

AGENDA

- Welcome
- Progress Since Last Meeting
- Project Timeline
- API Development and Testing
- API Demo
- Q&A / Wrap Up

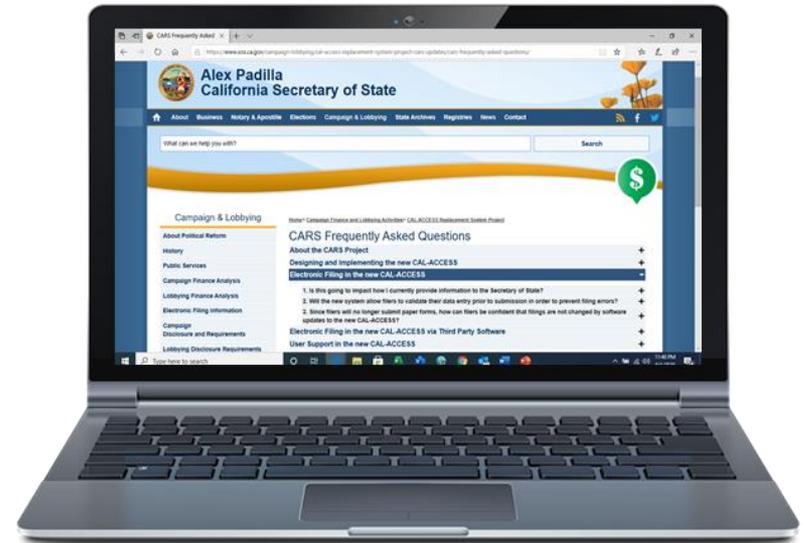


PROGRESS SINCE LAST MEETING

CAL-ACCESS WEBSITE UPDATE



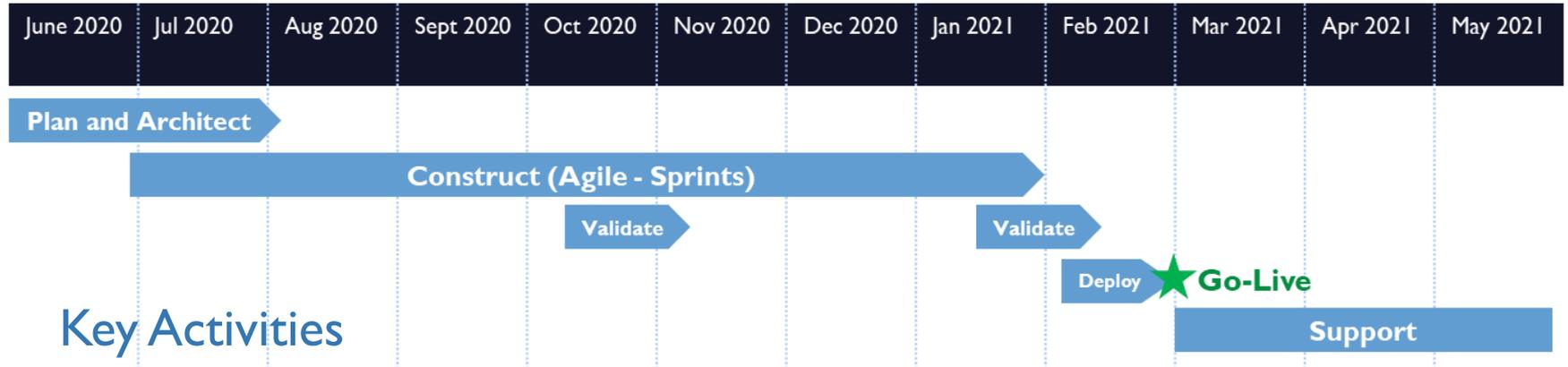
- New FAQs covering business and technical questions
- Calendar with links to meeting invitations
- CARS Project Pre 2020 Archive





- Three meetings held to date
- Topics covered
 - CAL File Preparation
 - Error Handling
 - Data Verification
 - Use of TRAN_IDs
 - XML File Schema Validations
 - Forms Verification / Attestation Process
 - Endpoint for Submitting Forms
 - Business Rules Validation Assumptions
 - Handling PDF Form Submission Files

PROJECT TIMELINE



Key Activities

- JULY 2020 - JANUARY 2021: Application Development
- SEPTEMBER - OCTOBER 2020: API Specifications and API Software Vendor Testing
- JANUARY - FEBRUARY 2021: SOS User Acceptance Testing (UAT)
- EVERY 6 TO 8 WEEKS: Software Vendor and Service Provider Meetings
- EVERY 2 WEEKS: Software Vendor Subgroup Sessions



API DEVELOPMENT AND TESTING

CAL-ACCESS SPRINTS 1 AND 2 COMPLETE



- Forms 400/402/410 Phase I (Phase II in progress)
- APIs developed
 - Read APIs
 - Search APIs
 - Lobbying Firm and Employer API
 - Committee API

API DEVELOPMENT ROADMAP



01: Requirements Analysis
Sprint Definition & Planning

01

02: API Design

Architecture to meet requirements

02

03: Mock API Development
CARS Project Team

03

04: Mock API Testing

SOS Information Technology Division
Software Vendor Subgroup
Additional Software Vendors

04

05: API Implementation

SOS Information Technology Division
Software Vendor Subgroup

05

06: API Integration Testing

SOS Information Technology Division
Software Vendor Subgroup

06

07: API End-to-End Testing

Software Vendor Subgroup
Additional Software Vendors
UAT: SOS Information Technology Division

07



Go Live!

API SPRINTS



Sprint 0 (Closed)

(06/29/20-07/17/20)

- Azure Configuration Complete
- Security Configuration Complete
- POC: Bulk Data Load Job for File Upload Complete
- Data Model Review and PoC's Complete
- POC: Processing PDF's Complete
- POC: Converting .CAL to XML Complete
- POC: Azure Storage Directories and Access Levels Complete

Sprint 1 (Closed)

(07/20/20-08/07/20)

- Create API Specification for Form API, Read API and Mocks to Get Status / PDF Complete
- Review Data Model / Business Rules in SFDC Complete
- Profile Read API Complete
- Candidate Read API Complete

Sprint 2 (Active)

(08/10/20-08/28/20)

- Public Draft API Specifications for Vendors
- Recipient Committee Registration (Form 410 API) - I In Progress
- Slate Mailer Registration (Form 400 API) - I In Progress
- Slate Mailer Termination (Form 402 API) - I In Progress
- Committee List Read API Completed
- Search Candidates for Last Two (2) Years API (by Candidate) Completed
- Lobbying Firm and Employer API Completed
- Lobbyist Read API Completed
- Measures Read API Completed
- Committee Information API - I In Progress

Sprint 3

(08/31/20-09/18/20)

- Lobbying Amendment (Form 605 API)
- Lobbyist Termination (Form 606 API)
- Lobbyist Withdrawal (Form 607 API)
- Form 400: Read Reference Data API
- Form 410: Read Reference Data API
- Form 601: Read Reference Data API
- Form 602: Read Reference Data API
- Form 603: Read Reference Data API
- Form 604: Read Reference Data API
- Recipient Committee Registration (Form 410 API) - II
- Slate Mailer Registration (Form 400 API) - II
- Slate Mailer Termination (Form 402 API) - II

Sprint 4

(09/21/20-10/09/20)

- Committee Disclosure (Form 460 API)
- Committee Disclosure - No Activity (Form 425 API)
- Committee Disclosure - 24 Hour (Form 496 API)
- Contributors/Payee Read API (by Candidate, Committee, or Lobbyist)
- Top 10 List of Late Contributors API (by Candidate)
- Top 10 Lobbying Employers API (Spending)
- Top 10 Independent Expenditures List API (by Measure)
- Top 10 Independent Expenditures List API (by Committee)
- Top 10 Independent Expenditures List API (by Candidate)
- Top 10 Contributors List API (by Candidate)
- Top 10 Contributors List API (by Measure)
- Independent Expenditure Read API
- Top 10 Contributors List API (by Committee)
- Committee Information API - II

Sprint 5

(10/12/20-10/30/20)

- Major Donor / IE Disclosure (Form 461 API)
- Slate Mailer Disclosure (Form 401 API)
- Committee Disclosure - Small Activity (Form 450 API)
- Committee Disclosure - 24 Hours Continued (Form 497 API)
- Top 10 Independent Expenditures Target API (by Committee) New
- Top 10 Independent Expenditures Target API (by Candidate)
- Top 10 Independent Expenditures Target API (by Measure)

Sprint 6

(11/02/20-11/20/20)

- Candidate Disclosure - Short Form (Form 470 API)
- Slate Mailer Disclosure for Late Payment (Form 498)
- Lobbying Disclosure - Lobbyist Report (Form 615 API)
- Lobbying Disclosure - Lobbying Form Report (Form 625 API)

Sprint 7

(11/23/20-12/11/20)

- Committee Disclosure - Paid Spokesperson Exp. (Form 511 API)
- Lobbying Disclosure - Attachment (Form 630 API)
- Lobbying Disclosure - Lobbying Form Report (Form 635 API)
- Lobbying Disclosure - Attachment (Form 635-C API)
- Lobbying Disclosure - Attachment (Form 640 API)

Sprint 8

(12/14/20-01/01/21)

- Bug Fixes / Unplanned Activities + Deployment
- User Authentication
- User Reports / Dashboards / Notifications
- Knowledge Document Preparation



Additional sprints will be conducted for testing and bug fixes

API TESTING APPROACH



Publish

- Mock API and technical documentation shared with vendors
- Separate guidelines for mock API testing and mock API testing developed and shared with software vendors

Test

- Software Vendor Subgroup testing of mock APIs performed early/mid September
- Additional software vendor testing of mock APIs performed in September
- Additional software vendor testing of APIs begin in October

Refine

Software vendor defects / issues communicated via established testing process shared before start of testing activities



API DEMO



Meeting presentations and new Frequently Asked Questions (FAQs) are continuously posted to the CAL-ACCESS website

WHERE TO FIND PROJECT INFORMATION



Visit the CAL-ACCESS project website

<https://www.sos.ca.gov/campaign-lobbying/cal-access-replacement-system-project-cars-updates/>

- View documents, news, and events
- Sign up to receive project updates

CARS Email Address: Submit questions and comments to the CARS project team:
PRDCARS@sos.ca.gov

**CAL-ACCESS
Replacement System
Project (CARS) Updates**

