Campaign Finance Template Instructions

August 2021

Contents

These template instructions demonstrate how to import financial data into the City of Columbus Campaign Finance online reporting system.

Understanding the Templates

Each template has a header row identifying the data type that needs to be in that column. At the end of each column description will be a number within parentheses. The number indicates how many characters are allowed in that field.

For example: In the Form 31A Template below, the First Name (50) column lists the first name of the contributor. The "50" at the end of it indicates that the field may be up to 50 characters long.

Important Things to Know...

- When populating the fields of the template or using your own spreadsheet, be sure there are no formulas in the spreadsheet, the data import will only take values.
- Ensure there are no hidden rows or columns in your spreadsheet before importing.
- The data must be in the proper order as indicated in the lists below.
- You will need to keep CONTRIBUTIONS and EXPENDITURES in two separate documents for the import.
- If columns A and C for contributor name are filled in, and column G for contributor organization is also filled in for the same contribution, Form 31A will not autofill correctly. Therefore, one should list the first and last name *or* an organization as the contributor – but both should not be listed.

The Templates

Form 31A (For CONTRIBUTIONS from Ohio Secretary of State Forms 31A & 31E)

Form 31A has the following data columns in order from left to right:

Data Type	Field Limit	Description
First Name	50	Fill out, unless contribution is from an organization
Middle Name	50	Optional
Last Name	50	Fill out, unless contribution is from an organization
Suffix	10	Optional
Registration Number, if PAC	50	If a PAC, registration number is required
Employer/Occupation/Labor Organization	100	Name of employer and occupation required for each contributor or "not applicable" if not employed
Organization	50	Fill out if organization is making the contribution, not an individual
Address	50	Street address of contributor
City	50	City
State	2	State
Zip Code	10	ZIP code
Form	50	Open text field for contribution, i.e. cash, check, transfer
Date	MM/DD/YYYY	Date of contribution
Amount	-	Dollars and cents
Event Date	MM/DD/YYYY	If contribution was received at a social event of fundraiser, the date event must be indicated
Form	-	31A for standard contributions or 31E if contribution was received from a social event or fundraiser

Form 31B (for EXPENDITURES from Secretary of State Forms 31B & 31F)

Form 31B has the following data columns in order from left to right:

Data Type	Field Limit	Description
First Name	50	Fill out, unless contribution is from an organization
Middle Name	50	Optional
Last Name	50	Fill out, unless contribution is from an organization
Suffix	10	Optional
Organization	50	Fill out if organization is making the contribution, not an individual
Purpose	100	Purpose of expense
Address	50	Street address of individual or organization paid
City	50	City
State	2	State
Zip Code	10	ZIP code
Check Number	50	Number of check used for the transaction
Date expenditure made	MM/DD/YYYY	Date expenditure made
Amount	-	Dollars and cents
Event Date	MM/DD/YYYY	If expenditure was made for a social event of fundraiser, the date of event must be indicated
Schedule Code	-	31B for standard expenditures or 31F if expenditure was made for a social event of fundraiser

Preparing the Document for Import

Please take note of the following before beginning:

- Ensure there are no hidden columns or you may unintentionally copy over from your spreadsheet.
- Ensure there are no formulas being copied over, if there are formulas please make sure you paste them into the template as "VALUES ONLY."
- 31A (CONTRIBUTIONS) and 31B (EXPENDITURES) data must be in separate Excel documents. The import will not work properly if they are in separate tabs on the same Excel document.
- To ensure you always have the most recent version of the template, it is recommended you download the most current set of templates from the website before each data import.

Using the Template Files

Inputting Data Directly into the Template

If you are using the Form 31A and Form 31B template files provided on the Campaign Finance website (https://campaignfinance.columbus.gov) the columns are already in the appropriate order, and the data types are formatted for friendly user input.

If you are simply entering the data by hand into the provided template spreadsheets, then no extra steps need to be taken to prepare the data. Each column is formatted to support properly formatted currency and dates.

Importing Data into the Template

If you are using your own Excel spreadsheets to track committee contributions and expenditures, you can copy the required data from your spreadsheet directly into the provided templates. In order to do this you will need to copy and paste each data column into the template from your own spreadsheet.

If you are using this method, as mentioned previously, please remember the following things:

- Ensure there are no hidden columns, you may unintentionally copy over from your spreadsheet
- Ensure there are no formulas being copied over, if there are formulas please make sure you paste them into the template as "VALUES ONLY"
- 31A and 31B data must be in separate Excel documents. The import will not work properly if they are in separate tabs on the same Excel document.

Moving data into the Templates

To easily copy your data into the template for import into the Campaign Finance website, follow these steps:

1. Identify the data you need to import into the template.
2. Copy each column of data individually from your spreadsheet into the template by doing the following:
    a. Select the top cell of data you will be copying by left clicking on the cell and holding the mouse button.
    b. Drag the mouse down the column to the bottom most cell of data. This will create a solid line and a shaded effect on the selected data.
    c. Copy the data into the clipboard by either:
        i. Holding down the "CTRL" button and pressing the "C" button, or
        ii. Releasing the left mouse button and with the data selected right click on it with the mouse bringing up the context menu and selecting "COPY" from the context menu.
    d. Open the template and find the appropriate column you wish to import your data into from the header row.
    e. To import the data, you may either:
        i. Select the top cell of the column you wish to populate and hold the "CTRL" key while pressing the "V" key, or
        ii. Right click the top cell in the data column you wish to populate and select "PASTE" from the context menu.
    f. You will need to repeat this step for each column of data until all the columns of the template are populated.

Using Your Own Spreadsheets to Import

If you wish to use your own spreadsheet to import into the Campaign Finance application, you will need to do the following steps:

1. Make a copy of your spreadsheet by:
    a. Opening your spreadsheet in EXCEL
    b. Navigate to the "FILE" menu
    c. Select "SAVE AS" from the file menu

   d. Save the file as a new name that can easily be identified as the import file

2. If you are storing both 31A and 31B data in a single spread sheet, it will need to be separated out into two Excel spreadsheets before you can go any further. Both types of data have to be imported in different steps of the process and cannot be mixed in the same Excel spreadsheet.

3. Ensure there are no hidden columns in the spreadsheet; you can do this by following the instructions below.
   To select all cells on a worksheet, do one of the following:
   a. Click the Select All button, which is in the top left corner of the spreadsheet just outside the spreadsheet data.
   b. Hold the "CTRL" key while pressing "A". (Note: If the worksheet contains data and the active cell is above or to the right of the data, pressing "Ctrl+A selects the current region. Pressing Ctrl+A a second time selects the entire worksheet).
   c. On the "Home" tab, in the "Cells" group, click "Format".
   d. Do one of the following:
      i. Under "Visibility", point to "Hide & Unhide" in the menu, and then click "Unhide Rows" or "Unhide Columns".
      ii. Under "Cell Size", click "Row Height" or "Column Width", and then type the value that you want in the Row Height or Column Width box. The default height for rows is 15, the default width for columns is 8.43.

4. Remove all formulas from the spreadsheet
   a. Select all the cells with formulas that you want to convert.
   b. Hold the "CTRL" and press the "C" or "CTRL" and "INSERT" to copy formulas and their results to clipboard.
   c. Hold the "SHIFT" and press the "F10" and then "V" to paste only values back to Excel cells.
      i. Hold the "SHIFT" and press the "F10" and then "V" is the shortest way to use Excel "Paste special - values only" dialog.

5. Re-order your columns to match the columns in the templates
   a. Select the column you wish to move with cursor by clicking the entire column.
   b. To move the column, point to the border of the selection.
   c. When the pointer becomes a move pointer (a black cross), left click on the border and drag the columns to another location and then release the mouse button.

6. Remove any extra data such as totals, notes, and columns that are not included in the data types accepted by the Campaign Finance website.

Importing Your Data

Before You Start

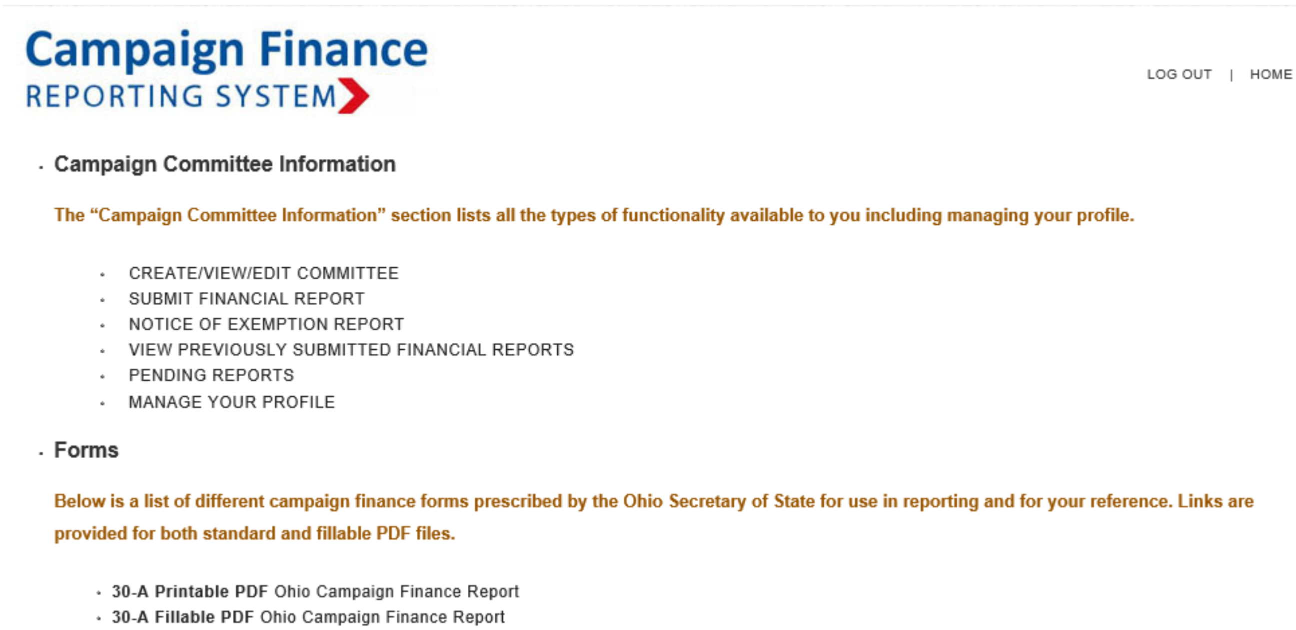
Before you can import your data into the Campaign Finance website, you must complete the following:

- Create an ACCOUNT MANAGER profile.
- A COMMITTEE created by the ACCOUNT MANAGER (the committee must be approved by the Clerk's Office before you will be able to report for that committee).
- Committee TREASURER PROFILE created *or* designated the ACCOUNT MANAGER PROFILE as the committee treasurer.

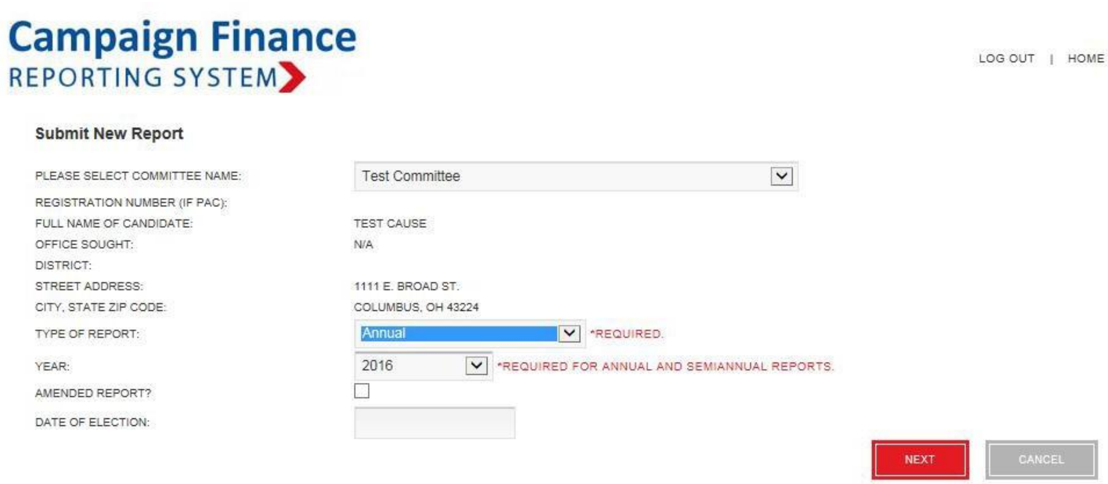
Data Reporting

Once you are ready to start, log into the Campaign Finance website (https://campaignfinance.columbus.gov). The following steps will walk you through the reporting process.

1. Select SUBMIT FINANCIAL REPORT from the main menu

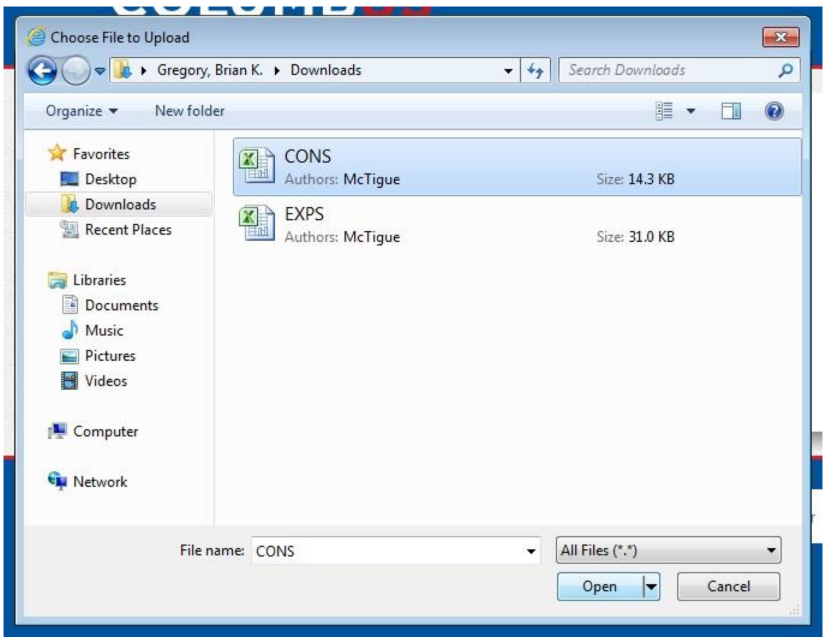


2. Select the Report Type (such as 5 Day, Quarterly, Semiannual), provide all required information for it, and then press "**NEXT**".

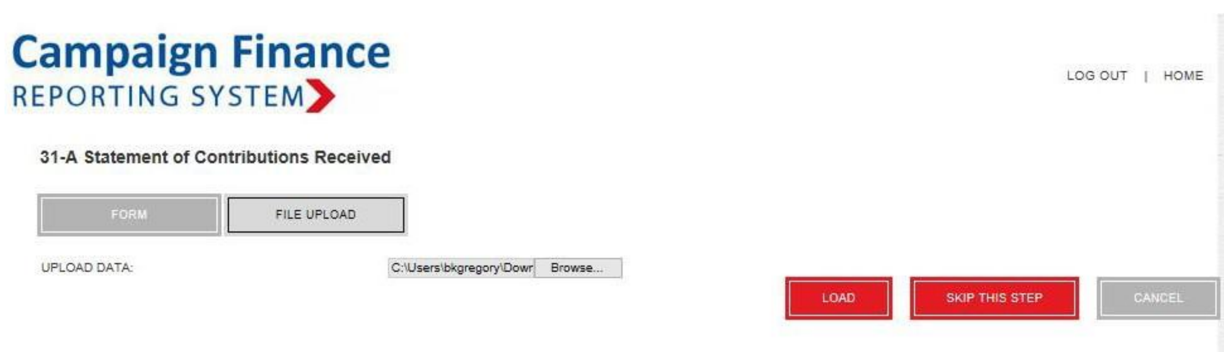


3. Select "FILE UPLOAD" for the 31-A reporting screen.

4. Select the “BROWSE” button to open the file dialogue and locate the spreadsheet that contains your contribution data (31-A). Select the file in the dialogue and press the “OPEN” button.

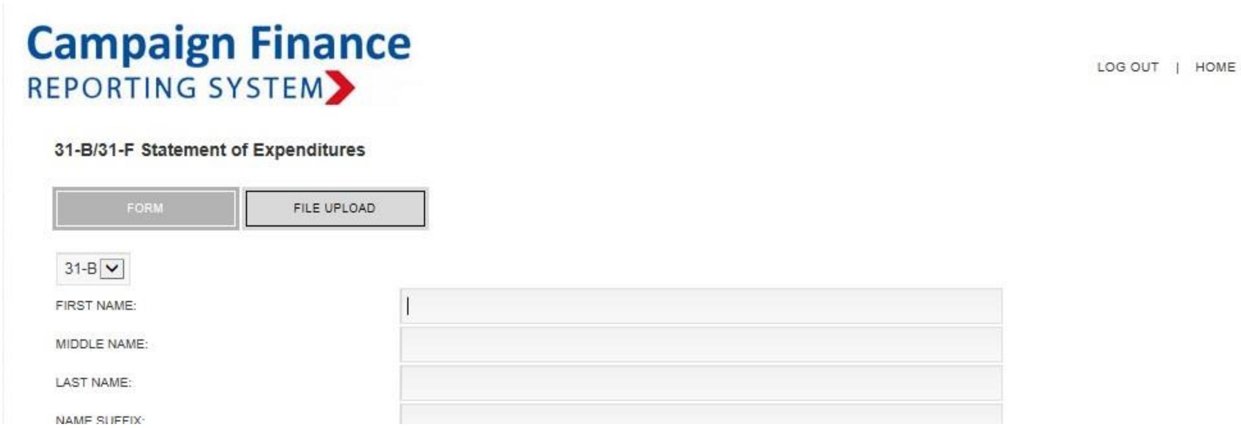


5. Select the “**LOAD**” button on the **31-A Statement of Contributions** screen.

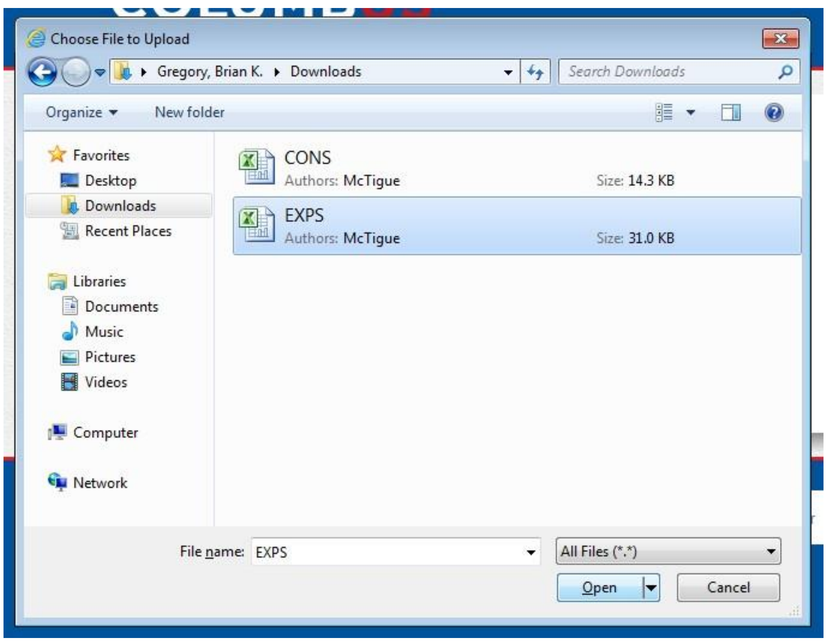


6. A list of all the contribution data that was imported will be displayed in a table on the screen. Review it carefully to ensure all records were imported. If there were any errors, they will be displayed at the top identifying which rows were skipped. You may edit or delete any row of data. Once the data has been verified as accurate, select the “NEXT” button.

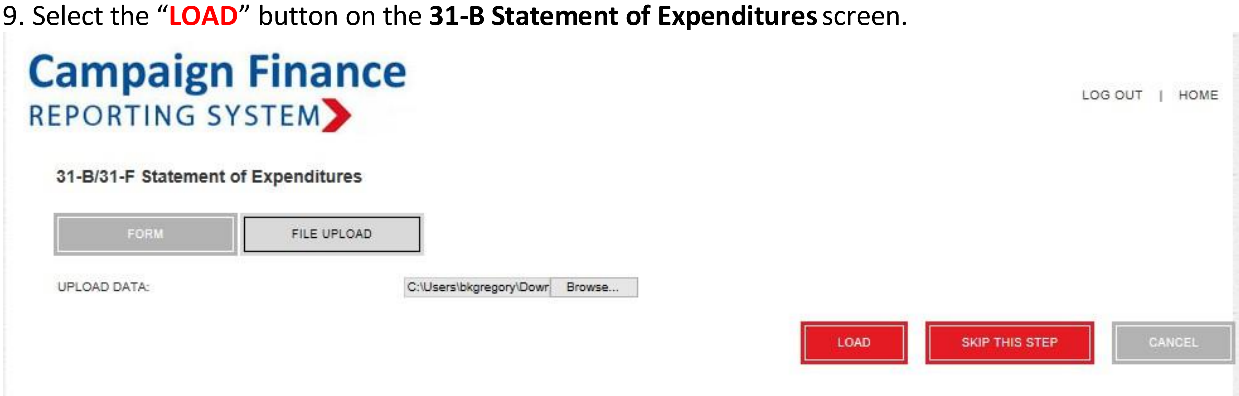
7. Select "FILE UPLOAD" for the 31-B reporting screen.



8. Select the "BROWSE" button to open the file dialogue and locate the spreadsheet that contains your expenditure data (31-B). Select the file in the dialogue and press the "OPEN" button.

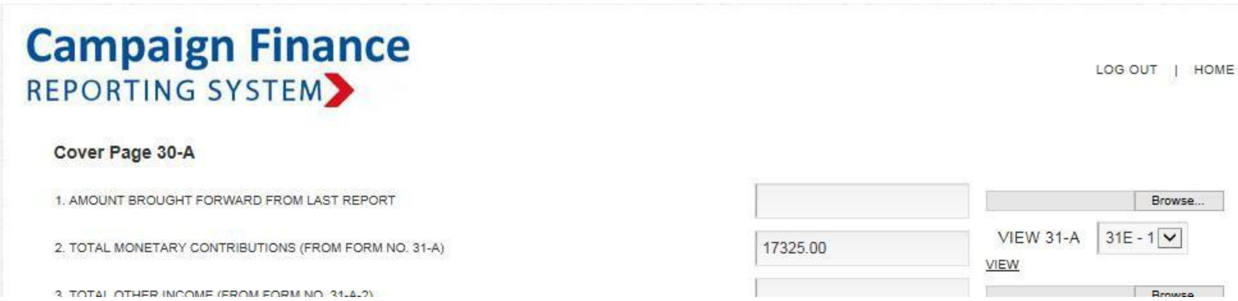


9. Select the "**LOAD**" button on the **31-B Statement of Expenditures** screen.

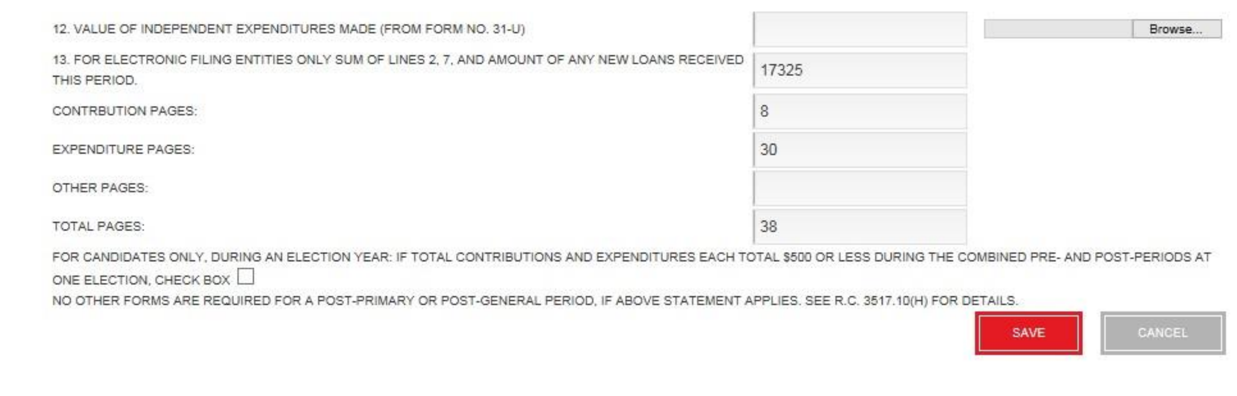


10. A list of all the imported expenditure data will be displayed in a table on the screen. Review it carefully to ensure all records were imported. If there were any errors, they will be displayed at the top identifying which rows were skipped. You may edit or delete any row of data. Once the data has been verified as accurate, select the "NEXT" button.

11. Complete the **30-A Cover Page** by uploading all other campaign finance forms used and adjusting the totals for each line item. Please ensure all totals and page numbers are accurate.



12. Once you have completed the cover page select the "**SAVE**" button to submit the data. This is the final step and makes the data available to the public.



Please contact Renata Ramsini at (614) 645-7673 or CampaignFinance@columbus.gov with any questions.