

# Campaign Finance Template Management

City Council - Columbus, Ohio

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The following is a guide line on how to import financial data into the City of Columbus Campaign Finance online reporting system. There are many ways in which your financial data can be put in the proper structure to import, and this document will provide several methods and provide a guide for the types of data the system accepts and how to provide it.

## 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 First name(50) – This column is for 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 separated into two documents for the import.

## 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
<b>First name</b>	50	Must be used if not an organization
<b>Middle Name</b>	50	Optional
<b>Last Name</b>	50	Must be used if not an organization
<b>Suffix</b>	10	Optional
<b>Registration Number, if PAC</b>	50	If a PAC, registration number is required
<b>Employer/Occupation/Labor Organization</b>	100	Name of employer and occupation required for each contributor or “not applicable” if not employed
<b>Organization</b>	50	Name of organization making contribution must be listed if not an individual
<b>Address</b>	50	Street address of contributor
<b>City</b>	50	City
<b>State</b>	2	State
<b>Zip Code</b>	10	ZIP code
<b>Form</b>	50	Open text field for contribution, IE Cash, check, etc.
<b>Date</b>	MM/DD/YYYY	Date of contribution
<b>Amount</b>	-	Dollars and cents
<b>Event Date</b>	MM/DD/YYYY	If contribution was received at a social event of fundraiser, the date event must be indicated
<b>Form</b>	-	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	Must be used if not an organization
Middle Name	50	Optional
Last Name	50	Must be used if not an organization
Suffix	10	Optional
Organization	50	Must be used if 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 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.

## 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. 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.

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 spreadsheet 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 these instructions:
  - a. To select all cells on a worksheet, do one of the following:
  - b. Click the Select All button which is in the top left corner of the spreadsheet just outside the spreadsheet data.
  - c. 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).
  - d. On the "Home" tab, in the "Cells" group, click "Format".
  - e. 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 have the following things:

- You must have an ACCOUNT MANAGER profile created.
- 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).
- You must have
  - a 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

### Campaign Finance REPORTING SYSTEM

LOG OUT | HOME

#### - Campaign Information

- COMMITTEE
- SUBMIT FINANCIAL REPORT
- VIEW PREVIOUSLY SUBMITTED FINANCIAL REPORTS
- MANAGE YOUR PROFILE

#### - Forms

- 30-A OHIO CAMPAIGN FINANCE REPORT
- 30-D DESIGNATION OF TREASURER
- 31-A CONTRIBUTION PDF
- 31-A STATEMENT OF OTHER INCOME

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

### Campaign Finance REPORTING SYSTEM

LOG OUT | HOME

#### Submit New Report

PLEASE SELECT COMMITTEE NAME:	Test Committee
REGISTRATION NUMBER (IF PAC):	
FULL NAME OF CANDIDATE:	TEST CAUSE
OFFICE SOUGHT:	N/A
DISTRICT:	
STREET ADDRESS:	1111 E. BROAD ST.
CITY, STATE ZIP CODE:	COLUMBUS, OH 43224
TYPE OF REPORT:	Annual *REQUIRED.
YEAR:	2016 *REQUIRED FOR ANNUAL AND SEMIANNUAL REPORTS.
AMENDED REPORT?	<input type="checkbox"/>
DATE OF ELECTION:	

NEXT

CANCEL

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

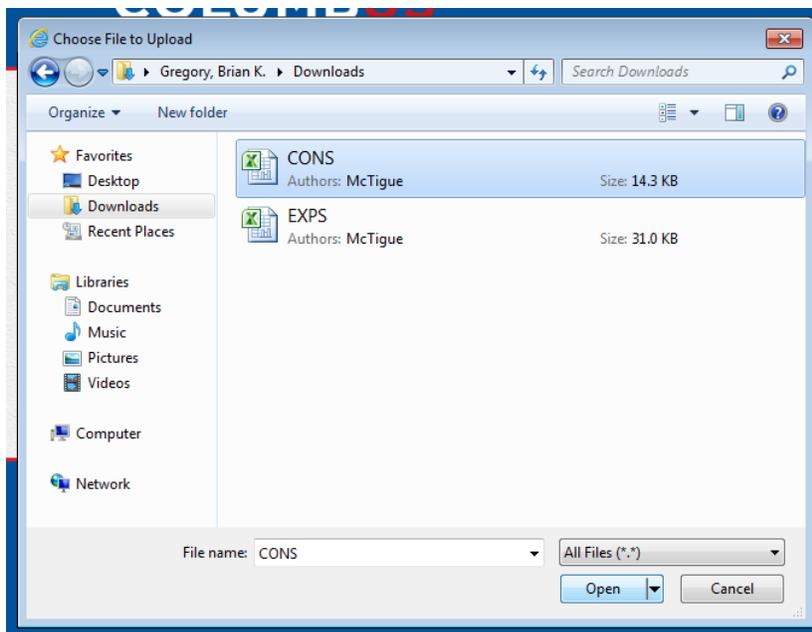
## 31-A Statement of Contributions Received

FORM FILE UPLOAD

UPLOAD DATA: C:\Users\bkgregory\Downr Browse...

LOAD SKIP THIS STEP CANCEL

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.

## 31-A Statement of Contributions Received

FORM FILE UPLOAD

UPLOAD DATA: C:\Users\bkgregory\Downr Browse...

LOAD SKIP THIS STEP CANCEL

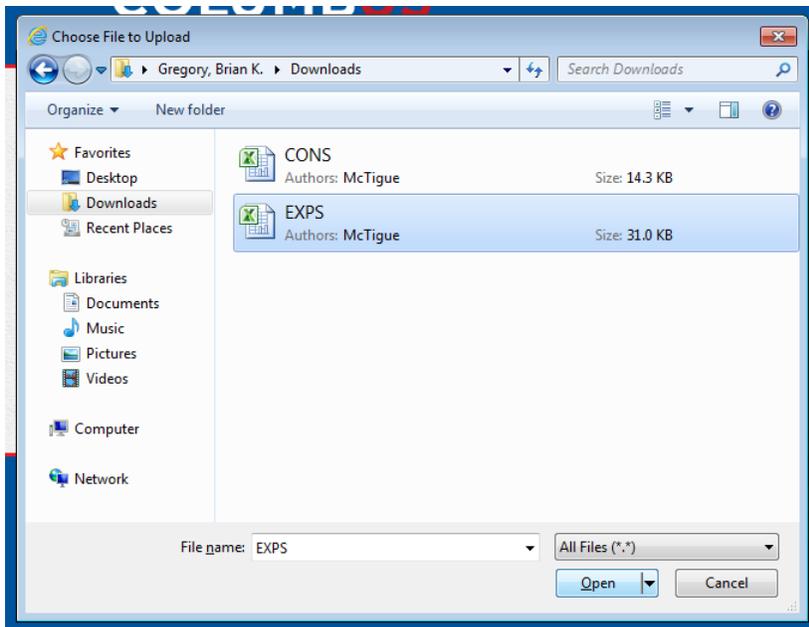
6. A list of all the contribution data that was imported will be displayed in a table on the screen. Review it carefully to ensure all records were imported. If there were any errors, they will be displayed at the

top of 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.

The screenshot shows the 'Campaign Finance REPORTING SYSTEM' interface. At the top right, there are links for 'LOG OUT' and 'HOME'. The main heading is '31-B/31-F Statement of Expenditures'. Below this, there are two buttons: 'FORM' and 'FILE UPLOAD'. A dropdown menu is set to '31-B'. Below the dropdown are four input fields labeled 'FIRST NAME:', 'MIDDLE NAME:', 'LAST NAME:', and 'NAME SUFFIX:'. The 'FILE UPLOAD' button is highlighted, indicating the next step in the process.

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.

**31-B/31-F Statement of Expenditures**

FORM FILE UPLOAD

UPLOAD DATA: C:\Users\lbkgregory\Down Browse...

LOAD SKIP THIS STEP CANCEL

10. A list of all the expenditure 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 of 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 any other campaign finance forms used and adjusting the totals for each line item. Please ensure all totals and page numbers are accurate.

**Cover Page 30-A**

1. AMOUNT BROUGHT FORWARD FROM LAST REPORT  Browse...

2. TOTAL MONETARY CONTRIBUTIONS (FROM FORM NO. 31-A) 17325.00 VIEW 31-A 31E - 1

3. TOTAL OTHER INCOME (FROM FORM NO. 31-B,2)  Browse...

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!

12. VALUE OF INDEPENDENT EXPENDITURES MADE (FROM FORM NO. 31-U)  Browse...

13. FOR ELECTRONIC FILING ENTITIES ONLY SUM OF LINES 2, 7, AND AMOUNT OF ANY NEW LOANS RECEIVED THIS PERIOD. 17325

CONTRIBUTION PAGES: 8

EXPENDITURE PAGES: 30

OTHER PAGES:

TOTAL PAGES: 38

FOR CANDIDATES ONLY, DURING AN ELECTION YEAR: IF TOTAL CONTRIBUTIONS AND EXPENDITURES EACH TOTAL \$500 OR LESS DURING THE COMBINED PRE- AND POST-PERIODS AT ONE ELECTION, CHECK BOX

NO OTHER FORMS ARE REQUIRED FOR A POST-PRIMARY OR POST-GENERAL PERIOD, IF ABOVE STATEMENT APPLIES. SEE R.C. 3517.10(H) FOR DETAILS.

SAVE CANCEL

You may contact Brian Shinn at 614-645-5525 or [beshinn@columbus.gov](mailto:beshinn@columbus.gov) if you have any questions.