Quick Reference Guide for the Online Disclosure System (ODS) Portal

Bulk Upload - Disclosure

Introduction

This guide is for Responsible Persons and Assistants managing the collection and reporting of political contributions. It contains information on creating disclosures using the bulk upload approach.

Bulk Upload (successful scenario)

Select Bulk Upload option on ODS Dashboard.

In the Start Bulk Upload screen, click on Disclosure template type in Download template section.
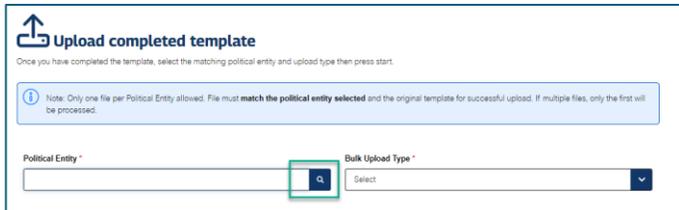
Select Disclosure.xls to download the upload template
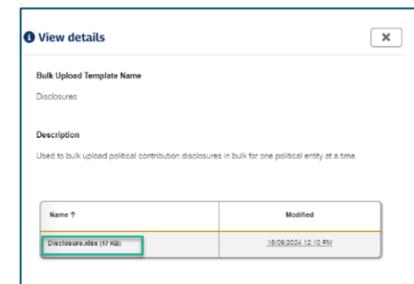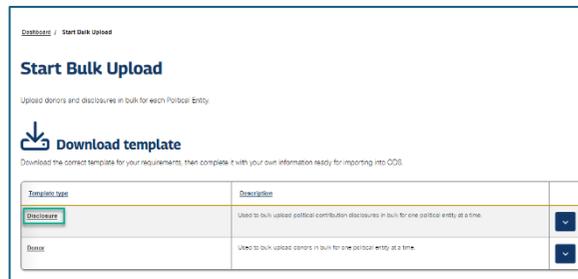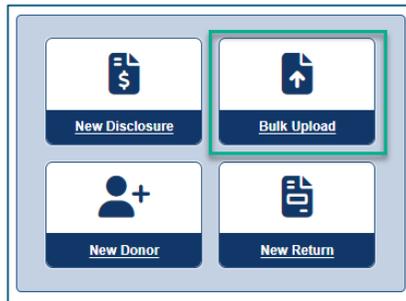
Enter disclosure details in the downloaded template and save.

Political Entity	Date Disclosure Received	Amount	Donor	Political Contribution Type
UT - Candidate	15/08/2024	11.00	Black Panther	Gift
UT - Candidate	10/08/2024	354.00	Captain Marvel	Gift
UT - Candidate	11/08/2024	128.00	Iron Man	Gift
UT - Candidate	1/08/2024	89.00	Captain America	Gift
UT - Candidate	7/08/2024	76.00	Spider Man	Gift

Search for Political Entity by clicking the magnifying glass icon.

Select checkbox against the desired political entity. Press the select button.
Select Disclosure under the Bulk Upload Type dropdown. Press Start Bulk Upload.

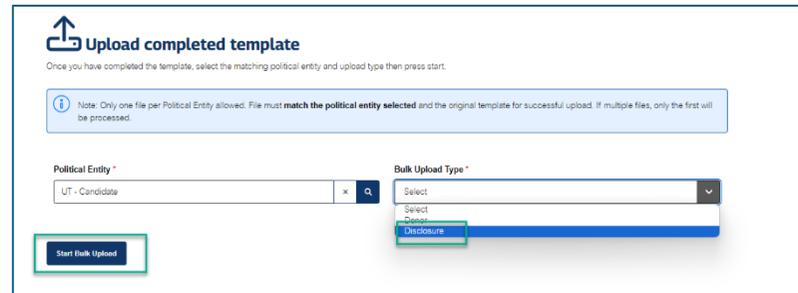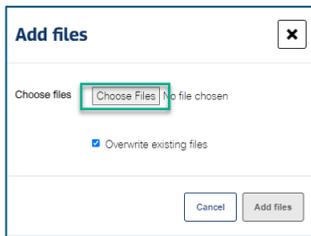Press the 'Add Files' button on the 'Upload the Completed Disclosure Template' screen.

- Select Choose Files.
- Navigate to the saved Disclosure Template and select.
- Press Open.
- Then press the Add files button.
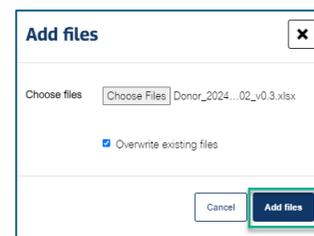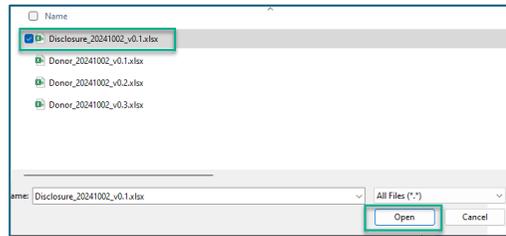
- Press the Process bulk upload button on the Upload the Completed Disclosure Template screen.
- Use Reload page button to refresh uploads in the Bulk Disclosure Upload Processing window.
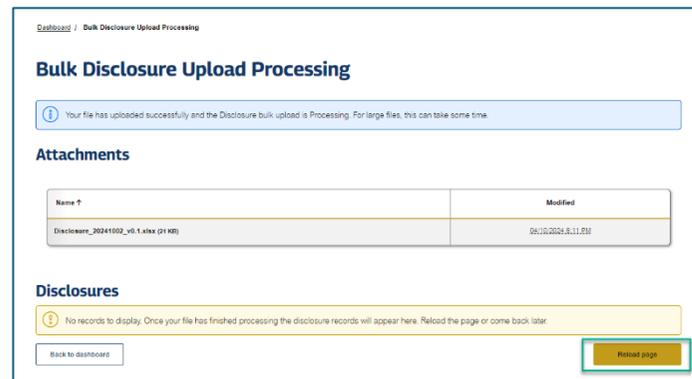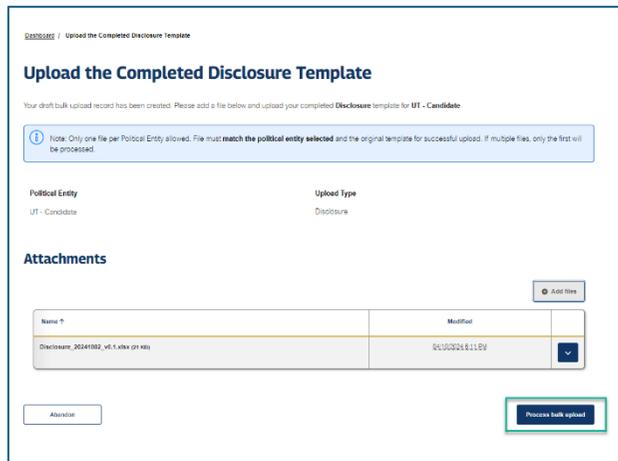
If the file successfully uploads, the Review Disclosure Bulk Upload screen will indicate with a message in the green box at the top of window. Success buttons will also appear for individual disclosures in the Bulk upload status column in the Disclosures table.

Press Submit.

The Disclosure Bulk Upload Complete screen will then appear.

Press the Back to dashboard button.

- Navigate to the Bulk section on Dashboard by pressing the Bulk tab.
- Scroll down to the All bulk upload section at the bottom of the Dashboard.
- Sort records by clicking on Bulk upload name at the top of the second column.
- Select the latest created Disclosure upload record.
- Verify the records are uploaded and are in an Active state.

Bulk Upload Process - Rectifying Minor Failures

This section covers situations where bulk upload attempts fail. The process for resolving bulk Disclosure failures is identical to that for Donor upload failures. Any failures will be identified by the system once the Process Bulk Upload stage has run.

Failure messages are displayed at the top of the Review Donor Bulk Upload screen, as well as for the individual disclosure entries where the failure exists.

To resolve failures, hover the cursor over the blue box on the RHS of the Disclosure field. This will provide two options, Deactivate and Edit.

- Clicking on the Edit option will display the Edit window, which will highlight the cause of the failure. In this case, the 'Donor' field was left blank in the import spreadsheet.
- Correct this by selecting the donor using lookup records (magnifying glass icon).
- Once correct donor is selected, click select.

- Select the orange Recheck button.

- In this case, the correction has resolved the failure issue, and the system now shows the status as Success.

- Click on Submit.

- Dashboard screen will be displayed and the All bulk uploads table will show that the Upload has been submitted.

Bulk Upload Process - Rectifying Major Failure

Another failure scenario is where the spreadsheet selected for the bulk upload is not formatted with the correct fields.

A screen titled Invalid Disclosure Bulk Uploaded Template displays.

The error message in the red box advises Users to start the upload process again.

In such cases, the failures are too extensive to be resolved using the 'correct and recheck' function for individual entries as described above.

In this case, it is advised that the process is abandoned and the upload process restarted with a new spreasdsheet with the correct formatting.

For assistance, contact fad@waec.wa.gov.au