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

Bulk Upload - Donor

Introduction

This guide is for Responsible Persons (registered agents and financial controllers) and Assistants managing the collection and reporting of political contributions. It contains information on creating Donors using the Bulk Upload function.

Bulk Upload (successful scenario)

Select Bulk Upload option on ODS Dashboard.

In the Start Bulk Upload screen, click on Donor template type in Download template section.

Select Donor.xls to download the upload template.
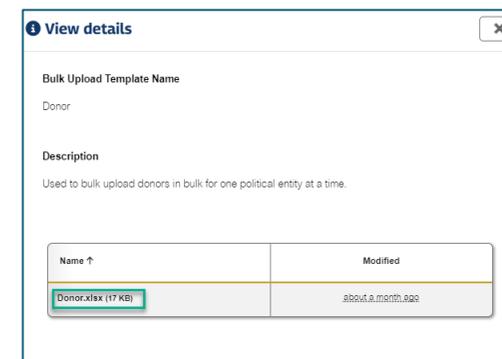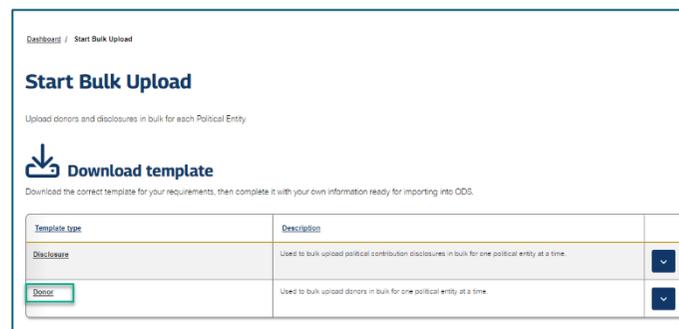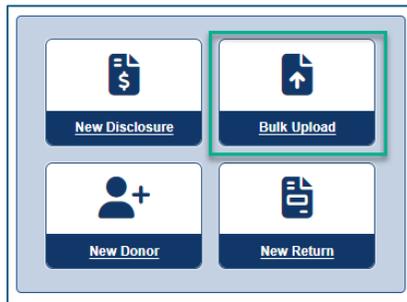
Enter Donor details in the downloaded template and save.

- Enter required donor details in the downloaded template and save the template.

- Ensure that your Political Entity name matches the name registered in ODS.

- Ensure the donor name details are correct. For example, no 'spaces' after the last word in each cell and between words. (It is essential for the donor name provided in the donor upload spreadsheet to match the donor name that appears in subsequent political contribution disclosures).

- If Silent elector is selected as yes, the address is still required for WAEC verification purposes but will not appear on the public disclosure website.

- Donor type is to be selected as Person (individual or company), Unincorporated Body, or Trust Fund or Foundation. For Unincorporated bodies, the names and addresses of Executive Committee members are included in the description field. For Trust funds and foundations, the names and addresses of all beneficiaries are to be provided.

- The ABN and Reference Number are not compulsory fields but help to verify the identity of the donor and to distinguish any donors with the same name.

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

- Press 'X' to close the dialogue box and return to the Start Bulk Upload screen.

- Search for Political Entity by clicking the magnifying glass icon.

- Select check box against the desired Political Entity.

- Press Select.

- Select Donor under the Bulk Upload Type dropdown.
- Press Start Bulk Upload.
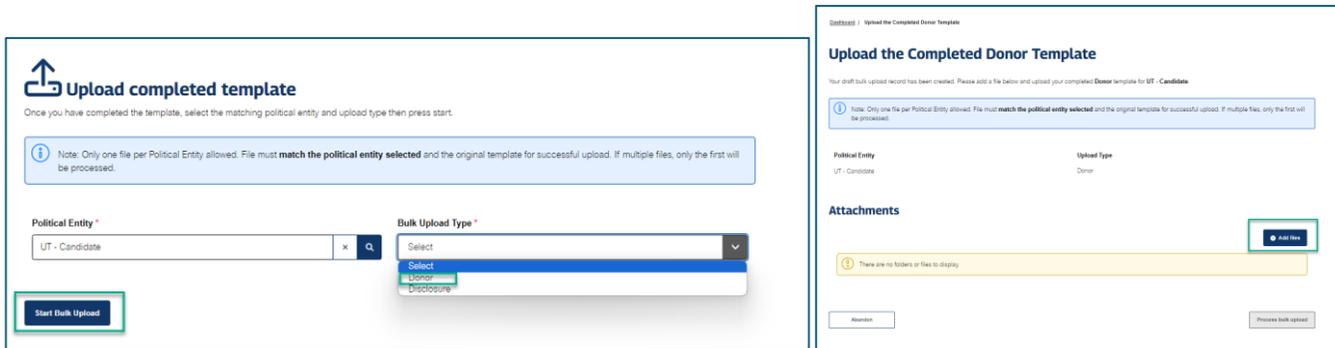
- Press Add Files on Upload the Completed Donor Template screen.
- Select Choose Files.
- Navigate and select the saved donor template.
- Press Open.
- Press Add files (ensure 'overwrite existing files' box is checked).
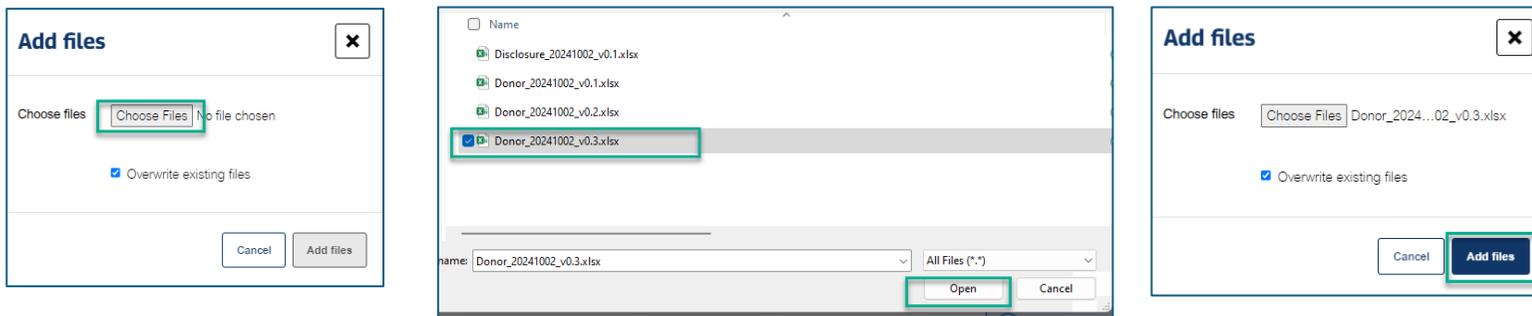
Upload the Completed Donor Template - press Process bulk upload.

Bulk Donor Upload Processing screen - a message will appear in the blue box at the top of the screen to advise 'your file has uploaded successfully.'

Use Reload button to refresh Bulk Donor Upload Processing window.

If the upload has been successful, the Review Donor Bulk Upload screen will indicate success with a message in the green box at the top of window.

The bulk upload status in the Donors table will display 'success' for each individual donor. See 'Rectifying Minor Failures' section below for guidance when there are failures associated with an upload attempt.

Press Submit, which will transmit to the WAEC for assessment and approval.

- Press Back to dashboard.
- 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 Donor upload record.
- Verify the records are uploaded.

Bulk Upload Process - Rectifying Minor Failures

This section covers situations where bulk upload attempts fail. 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 donor entries where the failure exists.

Dashboard / Review Donor Bulk Upload

Review Donor Bulk Upload

⊗ One or more records have failed validation. You will need to edit or deactivate each record and click recheck before you can submit.

Minimum requirements are: All donors must exist in the system. All mandatory fields must have a value. Postcodes are 4 digits only. Dates must be in Australian date format dd/mm/yyyy.

Political Entity

Green Bay Party

Upload Type

Donor

Attachments

Name ↑	Modified
Donor (17).xlsx (19 KB)	less than a minute ago

Donors

Donor name ↑	Political entity	Type	Postcode	Reference number	ABN	Silent elector	Bulk upload status	Status	
Bob Blue	Green Bay Party		6000	1234		No	Partial Failure	Active	⌄

| Abandon | | Recheck | Submit |

- To resolve failures, hover the cursor over the blue box on the RHS of the Donor 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 type field was left blank in the import spreadsheet.

- Correct this by selecting the type of donor and click save on the bottom of the window.

Select the orange Recheck button to process corrected item. The correction has resolved the failure issue and the system now shows the status as Success.

Donors

Donor name ↑	Political entity	Type	Postcode	Reference number	ABN	Silent elector	Bulk upload status	Status	
Bob Blue	Green Bay Party	Person	6000	1234		No	Success	Active	⌄

Abandon   Recheck   Submit

Click on Submit. The Dashboard screen will be displayed and the 'All bulk uploads' table will show that the Upload has been submitted.

All bulk uploads

Bulk uploads which have been abandoned or submitted.

Political Entity	Responsible Person	Type	
▼ Green Bay Party ⌄	▼ ⌄	▼ ⌄	Apply

Search bulk uploads... 🔍   Export   New

Political entity	Bulk upload name	Type	Responsible person	Submitted date ↓	Status
Green Bay Party	BUP-000106 - Donor	Donor	Andrew Main	21/11/2024 4:39 PM	Submitted
Green Bay Party	BUP-000097 - Disclosure	Disclosure	Kristian Ostle	11/11/2024 4:36 PM	Submitted
Green Bay Party	BUP-000102 - Disclosure	Disclosure	Andrew Main		Abandon
Green Bay Party	BUP-000103 - Disclosure	Disclosure	Andrew Main		Abandon
Green Bay Party	BUP-000105 - Donor	Donor	Andrew Main		Abandon

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 Donor Bulk Uploaded Template displays.

An error message also appears in the red box which 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