

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

Bulk Upload - Donor

Introduction

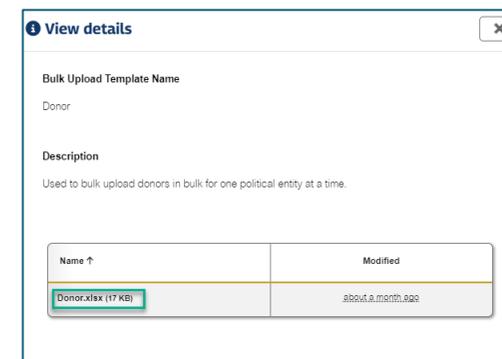
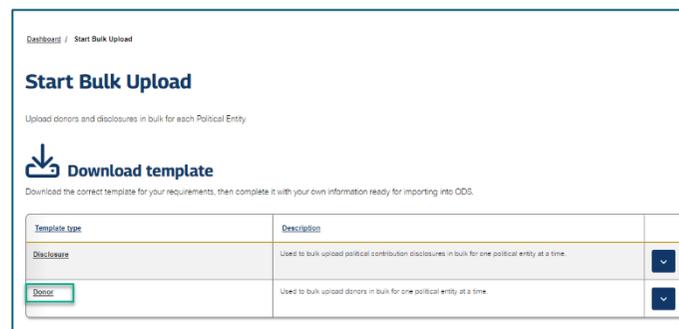
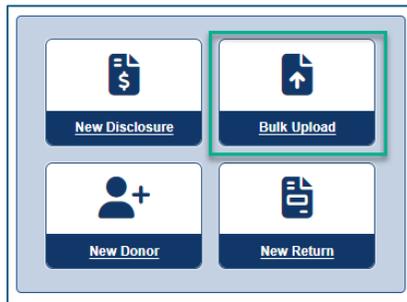
This guide is for Responsible Persons (registered agents and financial controllers) and Assistants managing the collection and reporting of political contributions. It contains information on creating Donors using the Bulk Upload function.

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.

View details ✕

Bulk Upload Template Name

Donor

Description

Used to bulk upload donors in bulk for one political entity at a time.

Name ↑	Modified
Donor.xlsx (17 KB)	2024.08.15 10:00 AM

Upload completed template

Once you have completed the template, select the matching political entity and upload type then press start.

Note: Only one file per Political Entity allowed. File must match the political entity selected and the original template for successful upload. If multiple files, only the first will be processed.

Political Entity * ✕

Bulk Upload Type * ▼

Lookup records ✕

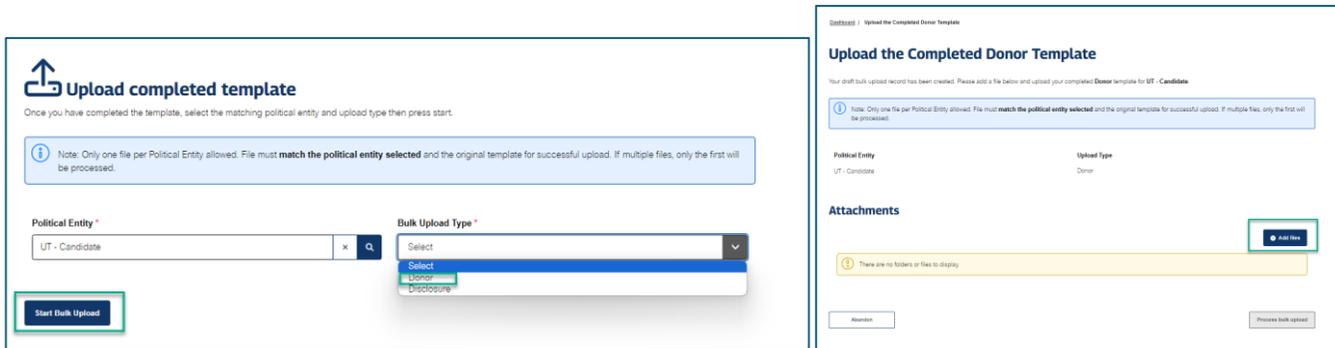
Search 🔍

Choose one record and click Select to continue

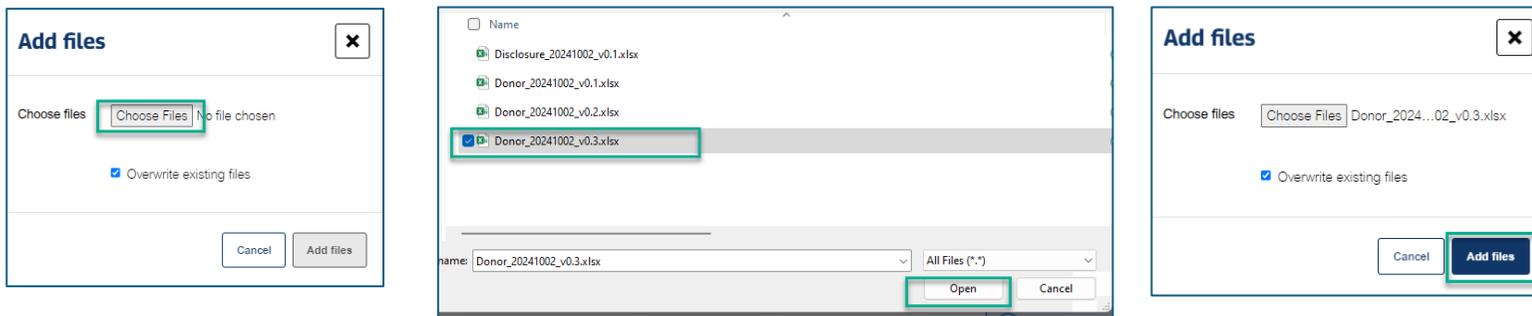
	Political Entity Name	Political Entity Type
<input type="checkbox"/>	Animal Justice Party	Associated Entity
<input type="checkbox"/>	The Showcase LG Group	Legislative Council Group
<input type="checkbox"/>	HEATHER MASCAL	Third Party Campaigner
<input checked="" type="checkbox"/>	UT - Candidate	Candidate

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- 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.

Upload the Completed Donor Template

Your draft bulk upload record has been created. Please add a file below and upload your completed Donor template for UT - Candidate.

Note: Only one file per Political Entity allowed. File must match the political entity selected and the original template for successful upload. If multiple files, only the first will be processed.

Political Entity	Upload Type
UT - Candidate	Donor

Attachments

[Add files](#)

Name ↑	Modified
Donor_20241002_v0.3.xlsx (0 KB)	24/10/2024 4:35 PM

[Abandon](#) [Process bulk upload](#)

[Dashboard](#) / Bulk Donor Upload Processing

Bulk Donor Upload Processing

Info: Your file has uploaded successfully and the Donor bulk upload is Processing. For large files, this can take some time.

Attachments

Name ↑	Modified
Donor_20241002_v0.3.xlsx (0 KB)	24/10/2024 4:35 PM

Donors

Info: No records to display. Once your file has finished processing the donor records will appear here. Reload the page or come back later.

[Back to dashboard](#) [Reload page](#)

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.

Dashboard / Review Donor Bulk Upload

Review Donor Bulk Upload

✔ Your bulk upload has successfully been checked. You may now submit your bulk upload. If required, you can edit the records, but you will need to click recheck before you can submit.

Attachments

Name ↑	Modified
Donor_20241002_v0.3.xlsx (20 KB)	04/10/2024 4:54 PM

Donors

Donor name ↑	Political entity	Type	Postcode	Reference number	ABN	Silent elector	Bulk upload status	Status	
Black Panther	UT - Candidate	Person	6001			Yes	Success	Active	▼
Captain America	UT - Candidate	Person	6000			Yes	Success	Active	▼
Captain Marvel	UT - Candidate	Person	6000			No	Success	Active	▼
Iron Man	UT - Candidate	Person	6000			Yes	Success	Active	▼
Spider Man	UT - Candidate	Person	6000			No	Success	Active	▼
Thor	UT - Candidate	Person	6000			No	Success	Active	▼

Abandon Recheck **Submit**

Dashboard / Donor Bulk Upload Complete

Donor Bulk Upload Complete

✔ Import successfully completed. You can now see all records in the relevant table on your dashboard.

Attachments

Name ↑	Modified
Donor_20241002_v0.3.xlsx (20 KB)	04/10/2024 4:54 PM

Donors

Donor name ↑	Political entity	Type	Postcode	Reference number	ABN	Silent elector	Bulk upload status	Status	
Black Panther	UT - Candidate	Person	6001			Yes	Submitted	Active	▼
Captain America	UT - Candidate	Person	6000			Yes	Submitted	Active	▼
Captain Marvel	UT - Candidate	Person	6000			No	Submitted	Active	▼
Iron Man	UT - Candidate	Person	6000			Yes	Submitted	Active	▼
Spider Man	UT - Candidate	Person	6000			No	Submitted	Active	▼
Thor	UT - Candidate	Person	6000			No	Submitted	Active	▼

Back to dashboard

- 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.

Dashboard - Online Disclosures

Sample of customisable message for Responsible Persons logged in.

Welcome, [Name]

You are currently viewing All Political Entities

New Disclosure **Bulk Upload**
New Donor **New Return**

Action Required

Disclosures Returns

Disclosures which have received feedback from a WAEC officer. **Note:** A delay in responding to a request for information will delay review of the disclosure. Please ensure it is done promptly to avoid penalties.

Search for disclosure... **Export** **New**

Donor	Political entity	Date received	Type	Amount	Financial year	Version
UT_Donor	UT - Registered Political Party	01/09/2024	Gift	\$100.00	2024-2025	Original
Cylops	UT - Candidate	07/09/2024	Gift	\$76.00	2024-2025	Original

Disclosures Returns **Bulk**

All bulk uploads

Bulk uploads which have been abandoned or submitted.

Political Entity Responsible Person Type **Apply**

Search bulk uploads... **Export** **New**

Political entity	Bulk upload name	Type	Responsible person	Status
UT - Candidate	BUP-000166 - Disclosure	Disclosure	Jitendra Bhagwat	Submitted
UT - Candidate	BUP-000166 - Donor	Donor	Jitendra Bhagwat	Submitted
UT - Candidate	BUP-000164 - Donor	Donor	Jitendra Bhagwat	Abandon
UT - Candidate	BUP-000145 - Donor	Donor	Jitendra Bhagwat	Submitted
UT - Candidate	BUP-000144 - Disclosure	Disclosure	Jitendra Bhagwat	Submitted
UT - Candidate	BUP-000143 - Donor	Donor	Jitendra Bhagwat	Submitted
UT - Candidate	BUP-000142 - Donor	Donor	Jitendra Bhagwat	Abandon
UT - Candidate	BUP-000141 - Donor	Donor	Jitendra Bhagwat	Abandon
HEATHER MASCAL	BUP-000137 - Donor	Donor	Heather Mascall	Submitted
HEATHER MASCAL	BUP-000132 - Donor	Donor	Heather Mascall	Submitted

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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

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	<div style="border: 1px solid black; padding: 2px;"> Deactivate Edit </div>

- 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.

Edit

Political Entity *
Green Bay Party

Donor name *
Bob Blue

Donor type *
Select

Street *
[Empty]

Street 2
[Empty]

Suburb *
[Empty]

Edit

Political Entity *
Green Bay Party

Donor name *
Bob Blue

Donor type *
Person

Street *
10 Queens St

Street 2
[Empty]

Suburb *
Perth

Edit

Postcode *
6000

Reference Number
1234

ABN
[Empty]

Silent elector

Description
[Empty]

Save

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: Green Bay Party Responsible Person: Type: Apply

Search bulk uploads... Q 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.

The screenshot shows a web interface with the following elements:

- Breadcrumbs:** Dashboard / Invalid Donor Bulk Uploaded Template
- Title:** Invalid Donor Bulk Uploaded Template
- Error Message (Red Box):** "The file you uploaded was invalid, please review your excel file and start the process again. Ensure your upload file matches the political entity selected and the template provided for the Donor upload type. The invalid file has been copied into the Processed folder."
- Metadata:**
 - Political Entity: Green Bay Party
 - Upload Type: Donor
- Attachments Table:**

Name ↑	Modified
Processed	08/12/2024 3:47 PM
- Donors Section:** "No records to display. Once your file has finished processing the donor records will appear here. Reload the page or come back later."
- Buttons:** "Back to dashboard", "Abandon" (highlighted with a red box), and "Reload page".

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 spreadsheet with the correct formatting.

