



# CAMPAIGN FINANCE REPORTING

## User Guide

August 2021

## Contents

1	Introduction .....	1
2	How to Register.....	1
3	How to Log In .....	2
4	How to Reset a Password.....	2
5	Portal Navigation .....	3
5.1	Main view.....	3
5.2	Add/ Edit/ Delete functions .....	4
6	Account and Report Management Guidelines.....	5
6.1	Inactivity timeout.....	5
6.2	Multiple user access.....	5
6.3	Reuse existing information .....	5
6.4	Create and fill out a report .....	5
6.5	Submit a report .....	6



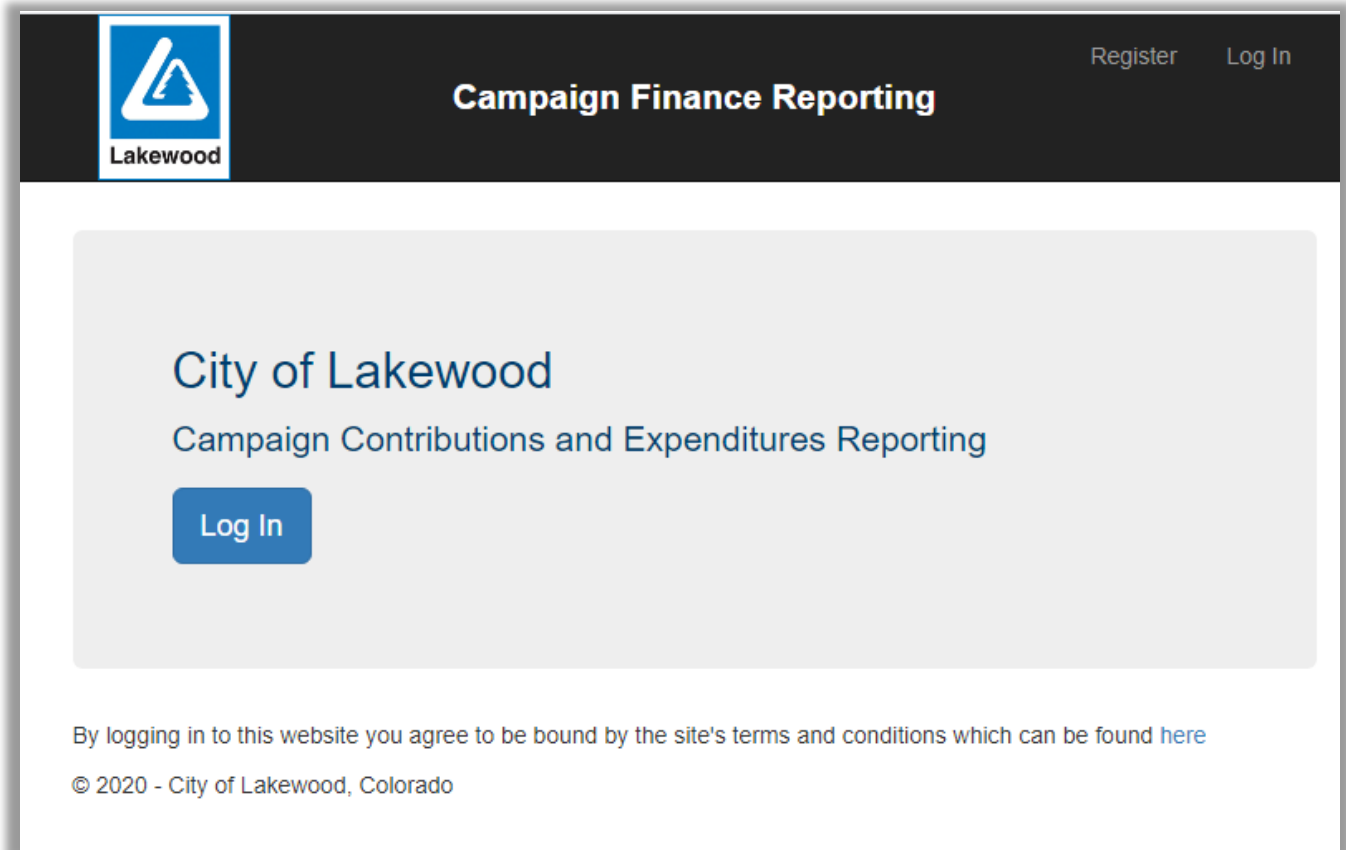


## 1 Introduction

The City of Lakewood, CO uses custom Campaign Finance solution to submit campaign finance reports.

Currently, Campaign Finance Reporting website allows candidates and elected officials to:

- Register their committee
- Create and submit Contributions and Expenditures report.





## 2 How to Register

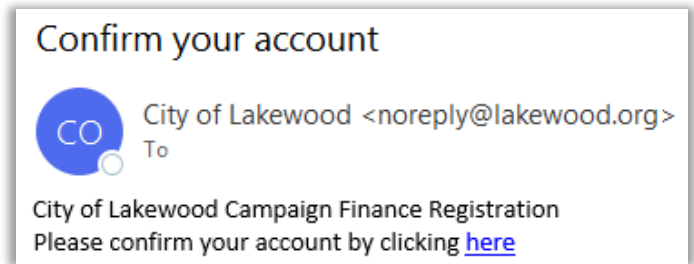
Click **Register** on the home page of the Campaign Finance portal and fill out account registration form.

*Email address and password provided on this page will be used to log in to the Campaign Finance portal.*

The screenshot shows the 'Campaign Finance Reporting' portal. At the top left is the Lakewood logo. To the right of the logo are the links 'Register' and 'Log In'. The main heading is 'Register' with the sub-heading 'Create a New Account'. Below this are three input fields: 'Email', 'Password', and 'Confirm password'. Under the password fields is a CAPTCHA image with the text 'BTSPDW' and 'BotDetect CAPTCHA ASP.NET Form Validation'. At the bottom of the form is a 'Register' button. A copyright notice at the very bottom reads '© 2020 - City of Lakewood, Colorado'.

To complete the registration process, use a link provided in the email to confirm your account.

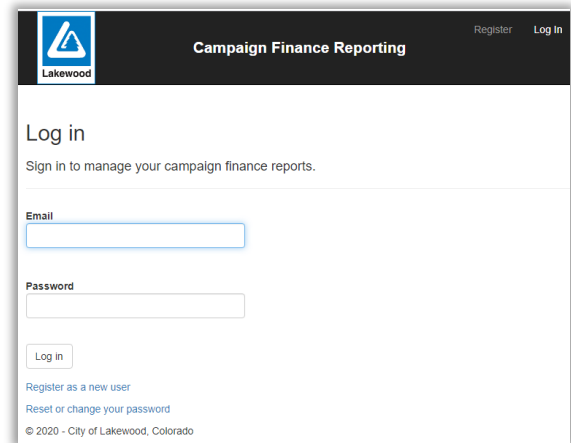
*Replies to this email will not be read. If you need assistance or have questions, please contact City Clerk's Office.*





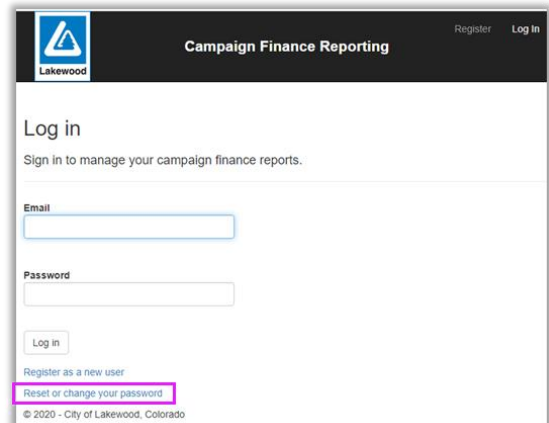
### 3 How to Log In

Click **Log In** on the home page of the Campaign Finance portal. Use email address and password you provided in the registration process.

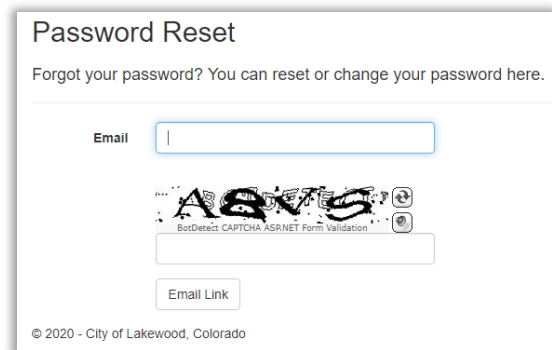


### 4 How to Reset a Password

Click **Log In** on the home page of the Campaign Finance portal, then **Reset or change your password**.



Fill out **Password Reset** form. Check your mailbox for the **Reset your password** email. Following instructions provided in that email.





## 5 Portal Navigation

### 5.1 Main view

Navigation elements of the portal are the following:

1. Committee selector.
2. Report selector for the selected Committee.
3. Contents of the selected Report.
4. Quick links to navigate to different sections of the selected Report.

The screenshot shows the 'Campaign Finance Reporting' portal. At the top left is the Lakewood logo. The title 'Campaign Finance Reporting' is centered at the top. On the right, there are 'User:' and 'Log Out' links. A left sidebar contains a menu with items: Summary, Monetary Contributions, Non-Monetary Contributions, Expenditures, Loans, and Transfers. The main content area has two dropdown menus: 'Committee' (with 'Add a Committee' link) and 'Report'. Below these are sections for 'Summary', 'Monetary Contributions', 'Non-Monetary Contributions', 'Expenditures', 'Loans', and 'Transfers', each with a table header and a 'Top' link. Numbered callouts (1-4) point to the Committee selector, Report selector, Summary section, and the sidebar menu respectively.

**Committee** 1 [Add a Committee](#)

-- Select a Committee --

**Report** 2

-- Select a Report --

**Summary** 3

	Transactions	Balance
--	--------------	---------

Top

**Monetary Contributions**

Date	Contributor	Amount
------	-------------	--------

Top

**Non-Monetary Contributions**

Date	Contributor	Amount
------	-------------	--------

Top

**Expenditures**

Date	Vendor	Amount
------	--------	--------

Top

**Loans**

Loan	Transaction Total
------	-------------------

Top

**Transfers**

Transfer
----------

Top

© 2020 - City of Lakewood, Colorado



### 5.2 Add/ Edit/ Delete functions

**General Rule: Different functions will be presented next to the record elements based on the status of the record and the stage of the reporting process.**

For instance, only **Add a Committee** function is presented by the Committee element when there is no committee record selected:

The screenshot shows a form titled "Committee". On the right side, there is a button labeled "Add a Committee". Below the title is a dropdown menu with the text "-- Select a Committee --" and a downward arrow.

After a committee is selected, other record management functions become available:

- **Edit Committee Users** – grant other registered users access to this committee.
- **Edit** – update this committee’s information (phone, email, address, etc.)
- **Delete** – delete this committee from the reporting system.

The screenshot shows a form titled "Committee". On the right side, there are buttons for "Add a Committee", "Edit Committee Users", "Edit", and "Delete". Below the title is a dropdown menu with the text "One for Lakewood - 1st Street, Lakewood, CO 80226" and a downward arrow.

**NOTE: the system will suggest if an action cannot be performed with a reason.**

For example, committee cannot be deleted, nor its name can be changed if there is at least one submitted report for that committee:

- **Delete** function is not available next to the committee name:

The screenshot shows a form titled "Committee". On the right side, there are buttons for "Add a Committee", "Edit Committee Users", and "Edit". Below the title is a dropdown menu with the text "123 Lakewood - 1 Street, City, TT 35621" and a downward arrow.

- Committee name cannot be updated:

The screenshot shows a form titled "Edit Committee". At the top, there is an error message: "ERROR: Cannot change the name of a committee with submitted reports." Below this, there is a "Committee Type" dropdown menu with "Candidate Committee" selected and a "Required" label. Below that is a "Name" field with the text "124587 for Lakewood" and a "Required" label.



## 6 Account and Report Management Guidelines

### 6.1 Inactivity timeout

- User will be logged out of the system after 15 min of inactivity.

### 6.2 Multiple user access

- A committee reports can be accessed by more than one user.
- A user needs to be registered (see section 2 of this document) before they can be granted access to the committee.
- Use **Edit Committee Users** function to grant or revoke access to your committee.

### 6.3 Reuse existing information

- On many fields that have drop-down values you can choose to re-use existing records (to speed up data entry process and to maintain data accuracy and consistency on your reports), or you can create a new entry if a desired record does not exist.

For instance, for the Bank record you may pick a value from the list or add a new bank record (**Add New Bank** function):

- **Vendor** record can be used by any committee in the system (shared record).
- **Contributor** record can only be used by a committee they were created under (private record).

### 6.4 Create and fill out a report

- Use **Add a Report** function above the Report selector to create a new report.

- Multiple active (unsubmitted) reports can exist at the same time.
- Monetary Contributions, Non-Monetary Contributions, Expenditures, Loans and Transfers can be added/updated/deleted any time until a report is made final.

Monetary Contributions			<a href="#">Add a Monetary Contribution</a>
Date	Contributor	Amount	
8/2/2020	Company ABC - www.oak.oops	\$100.00	<a href="#">Edit</a> <a href="#">Delete</a>

[Top](#)





### 6.5 Review and submit a report

- **Submitted reports cannot be edited or deleted later.**
- PDF file of the submitted report will be emailed to the City Clerk’s Office and to the user who submitted it.
- Use **Show Details Below** function if you wish to view more information in the contributions and expenditures tables on this screen.
- To preview and/or submit a report, use **Preview/Submit This Report** function by the Report selector, or at the top or the bottom of the report:

## Report

[Add a Report](#)
Preview/Submit This Report

Regularly Scheduled Filing, 01/01/2021 through 01/04/2021
▼

[Edit](#)  
[Delete](#)

✔ Show Details Below

Net Loan Activity	\$0.00	\$0.00
Net Transfer Activity	\$0.00	
Ending Balance		\$1,025.00

[Top](#)

### Monetary Contributions

[Add a Monetary Contribution](#)

Date	Contributor	Amount	
2/1/2021	Friend 2 www.www.www Employer: Company A, Description: gift card	\$25.00	

[Top](#)

### Non-Monetary Contributions

[Add a Non-Monetary Contribution](#)

Date	Contributor	Amount	
------	-------------	--------	--

[Top](#)

### Expenditures

[Add an Expenditure](#)

Date	Vendor	Amount	
------	--------	--------	--

[Top](#)

### Loans

[Add a Loan](#)

Loan	Transaction Total
------	-------------------

[Top](#)

### Transfers

[Add a Transfer](#)

Transfer
----------

[Top](#)

Preview/Submit Report