

# Indiana Campaign Finance System– Secure Site

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## Overview

The Indiana Campaign Finance System is provided by the Indiana Election Division to enable campaign committees to manage contributions and expenditures, maintain contributors and payees and file all required reports on line. Using the Indiana Campaign Finance System will help committees escape some common errors that can occur with these filings by avoiding duplicates, and simple math errors that occur when filling out paper forms.

The system enables committees to:

- Maintain ongoing information about contributions and expenditures. Information can be entered and saved throughout the reporting period.
- Search for previous contributors while adding contributions, to allow for maintaining a Contributor’s Year-To-Date contribution amount.
- Search for previous payees while adding expenditures, to allow for maintaining a Payee’s Year-To-Date expenditure amount.
- Preview a report prior to filing by printing a hard copy or reviewing the report online.
- Once a report has been filed, if changes need to be made in any previously filed contributions or expenditures. The system allows the user to file an “Amended” report.
- Based on dates and dollar amounts of contributions the system will automatically add a “Large Contribution” report to the committee’s schedule that can be filed online.

The software also provides committees with the functionality to import data using either an Excel or XML template. This process eliminates the individual online entry of contributions and expenditures that are needed to complete a report.

By using the Campaign Finance System, a committee will reduce the chance of data entry errors that can result when the report is submitted on paper to the Election Division, then re-entered into the Campaign Finance system by hand in order for it to appear on the Election Division’s web site. Using the Campaign Finance system also will help save taxpayer money by reducing the data entry costs associated with re-entering this information.

## System Information

There is no software that needs to be installed on individual PC’s. The Indiana Campaign Finance System is a web-based application that runs using most web browsers. Before trying to access the Indiana Campaign Finance System please be aware that our site uses pop-up windows. If you are currently blocking pop-ups you may want to consider either enabling them for this website or temporarily turning off your pop-up blocker while on our site.

## Getting Started

To access the Committee Workspace of the Campaign Finance System users will need a **User Name** and **PIN**. To obtain your User Name and PIN please contact the Campaign Finance staff of the Indiana Election Division @ 317-232-3939 or email, [campaignfinance@iec.in.gov](mailto:campaignfinance@iec.in.gov) .

Once you have received your User Name and PIN - starting from the Indiana Campaign Finance System Homepage <http://campaignfinance.in.gov/PublicSite/Homepage.aspx> , follow the steps below.

- Click the Committee Login link located on the left side of the Campaign Finance Home page.
- Enter your **User Name** and **PIN** and click the **LOGIN** button.  
The first time you login to the application the system will take you to the First Login, Setup Page. On the First Login, Setup Page your user name will be displayed. To complete the setup you will need to enter the **PIN** you previously received from the Election Division, again. Enter a **New PIN** (this will be your personal PIN), then **Verify** that PIN (enter your New PIN again). You then need to select a **New** security Question from the drop down selection box, **Answer** the question you selected, then **Verify** that answer (enter the same answer again).
- Click SUBMIT

You will then be directed to the **Registered User Login** page, where you will be required to enter your User Name and PIN. (Remember your PIN is the new one you just set up in the steps above, not the one given to you by the Election Division). After you have entered your User Name and PIN, click the Login button.

## Problems Connecting to the Website

Having problems accessing the Campaign Finance web-site? The first two things you need to check before contacting the Campaign Finance staff of the Indiana Election Division are as follows:

1. Is the security level of your Internet browser is set to High? You may need to add the Campaign Finance web application URLs to your Trusted Sites list.
2. Are you are currently blocking Pop-Ups? You may need to enable pop-ups for this website or temporarily turn Pop-Up blockers off.

Instructions will vary for both items listed above depending on the browser used to access the Indiana Campaign Finance application.

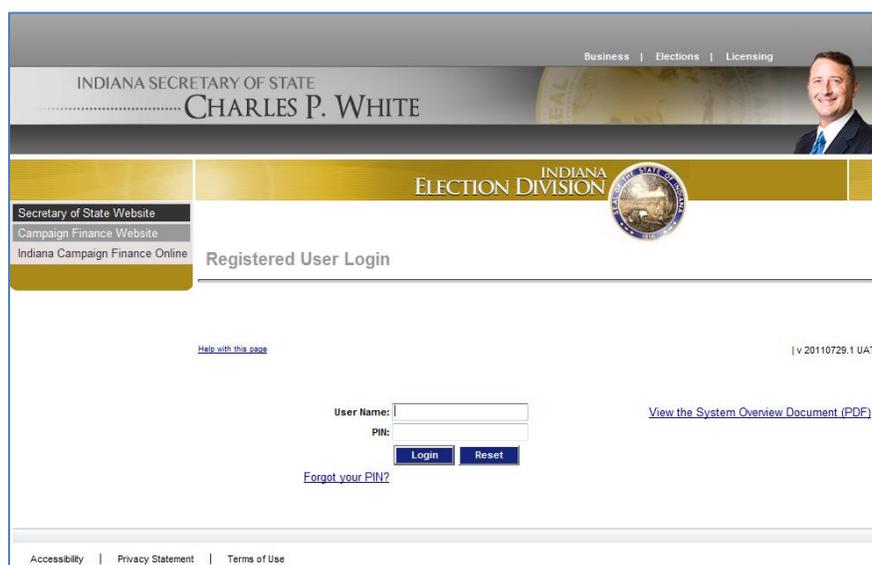
## Problems Logging in

Having problems getting logged into the Campaign Finance web-site? Is it due to one of the items listed below?

1. You have forgotten your password.
2. You have been locked out of your account for one of two reasons.
  - a. You failed to successfully log in after three consecutive attempts.
  - b. You failed to change your password within 7 days of being prompted by the system.

If you have forgotten your password, click the **Forgot Your PIN?** link on the Registered User Login page.

## Registered User Login page



The screenshot shows the 'Registered User Login' page. At the top, it identifies the Indiana Secretary of State as Charles P. White. The page is part of the Indiana Election Division website. On the left, there are navigation links for 'Secretary of State Website', 'Campaign Finance Website', and 'Indiana Campaign Finance Online'. The main content area features a login form with fields for 'User Name:' and 'PIN:', a 'Login' button, and a 'Reset' button. There are also links for 'Help with this page', 'Forgot your PIN?', and 'View the System Overview Document (PDF)'. The version number 'v 20110729.1 UAT' is displayed in the top right corner of the form area. At the bottom, there are links for 'Accessibility', 'Privacy Statement', and 'Terms of Use'.

The Registered User Login page contains 3 links. The links on the page are as follows:

1. *Help with this page* – This link provides access to page-level Help. The page-level Help provides access to the table of contents, index, glossary and search feature, it is available on every page of the application. Help opens in a separate window, and can be opened and closed independently of the Campaign Finance application. For detailed information on using Help, click the Help with the page link.
2. *Forgot your PIN?* – This link provides users the ability to retrieve their password by providing the correct answer to the Security Question they selected when initially setting up their password. For detailed information on retrieving a password, please refer to the online Help.
3. *View the System Overview Document* – This link opens this Overview document in PDF format.

# Navigating the System

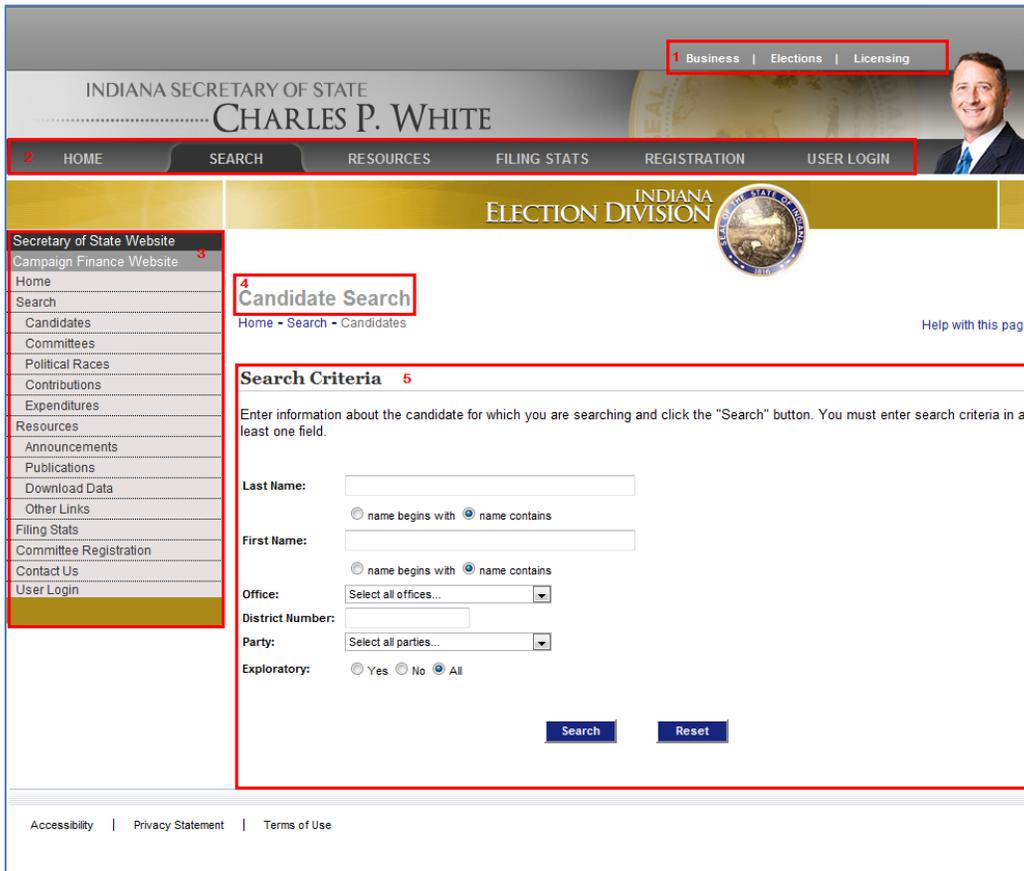
Listed below are the 6 topics that include various methods of navigating the system. Please take a few minutes and familiarize yourself with the system before entering data.

- ❖ Page Layout
- ❖ Menu
- ❖ Tool Tips
- ❖ Elements
- ❖ Data Grids

## PAGE LAYOUT

Each page in the system has a similar layout and is made up of 5 main parts.

1. Link Menu Bar – A group of links to pages
2. Tab
3. Left
4. Page Title
5. Workspace

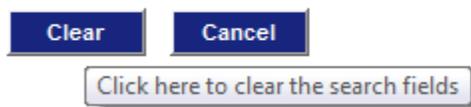


## MENU

Application functionality can be accessed using the Tab Menu Bar located directly above the Workspace or when using the Public Site, the Left Navigation Menu located to the left of the workspace. The options displayed in the menus vary based on your assigned security roles and the Public versus the Secure Site.

## TOOL TIPS

Most fields and buttons on a page have been assigned a tool tip, with the exception of fields and buttons within a data grid. Tool Tips are displayed when you hover the mouse over a field or button or, for some items such as drop-down lists boxes or radio buttons, in the blank space surrounding the item. Below is an example of a tool tip for the **Clear** button.



## ELEMENTS

<b>Name:</b> <input type="text"/>	<b>Text Field</b> – An area on a page that allows you to enter or view a single unit of data (e.g., Name, Address)
<b>Penalty Status</b> <input type="text" value="Proposed"/> <ul style="list-style-type: none"> <li>Proposed</li> <li>Assessed</li> <li>Dismissed</li> </ul>	<b>Drop-Down List Box</b> – A list of available choices that displays when you click the arrow on the right side of the drop-down list box. Some drop-down list boxes are configured to allow you to select multiple items, while others allow you to select only one.
<b>Settlement Agreement</b> <input type="checkbox"/>	<b>Check Box</b> – A small, square box you can select or clear to turn an option on or off.
<b>Report Type:</b> <input checked="" type="radio"/> <b>Summary</b> <input type="radio"/> <b>Detail</b>	<b>Radio Button</b> – A button that represents a mutually exclusive selection (only one option may be selected at a time). When you click a radio button, the previously selected radio button is cleared.
<input type="button" value="Save"/>	<b>Push Button</b> – a rectangular box with a label or/graphic on the face that performs a specific action when you click it.
<a href="#">Help with this page</a>	<b>Link</b> – Underlined text that performs a specific action when you click it.

## DATA GRIDS

A data grid is used to display information pulled from the database in a table format (rows and columns). Each row represents a single record and each column represents a single field. For data grids, rows and records are interchangeable terms. Data grid titles and column headings are hidden if there are no records to display. If a column in a data grid contains no data, it's because the field was not populated by either the user or the system, whichever the cause may be.

- **Sorting**

*A column heading that is underlined indicates the data grid can be sorted by that column. Clicking a column heading will sort the data grid in ascending order by the column selected. Clicking the column heading again will sort the data grid in descending order by the column selected.*

- **Paging**

The number of records in a data grid may exceed the maximum allowed to display on a single page. In this case, page numbers are displayed at the bottom of the data grid to allow you to move between pages of the data grid. You can navigate the pages by clicking the desired page number.

- **Page Size**

The number of records displayed on a single page of the grid is limited to a pre-set amount. To increase the number of records displayed on the page, click the Page Size dropdown, to increase the number of items displayed on each page of the grid.

- **Links**

A data grid may contain links that allow you to view additional information for a specific row. Clicking on a link opens the detail page for the corresponding record. In the example below, when you click the **UPDATE** link for Advance America, that individual contribution is displayed to the screen for update.

<u>Contributor Name</u>	<u>Date Received</u>	<u>Date Entered</u>	<u>Amount</u>	<u>Type</u>	<u>Offset</u>	<u>CFA 4 Filed</u>	<u>CFA 11 Filed</u>	<u>Amend</u>		
	04/15/2010	05/23/2011	\$100.00	Unitemized	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
ACEC Indiana	06/25/2010	10/13/2010	\$300.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
Advance America	06/25/2010	10/13/2010	\$250.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
Allon Friedman	09/13/2010	10/15/2010	\$100.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
Alp Berker	07/22/2010	10/13/2010	\$100.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
Ambrosia	08/02/2010	10/12/2010	\$100.00	In-Kind	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
AMERICAN INSURANCE ASSOCIATION INDIANA PAC	08/05/2010	10/14/2010	\$250.00	Direct	No	Yes	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
American Physical Therapy Association Indiana Chapter Political Action Committee	08/13/2010	10/14/2010	\$250.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
ASSOCIATION TO BUILD A BETTER INDIANA	08/05/2010	10/14/2010	\$500.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>
AT&T Indiana Political Action Committee	08/05/2010	10/14/2010	\$500.00	Direct	No	No	No	No	<a href="#">Update</a>	<a href="#">Delete</a>

1 2 3 4 5 6 7 8 9 10 ... Page Size: 10 ▼

## Exiting the System

You can exit the system from anywhere in the application. Always complete or cancel out of the current transaction and log out of the system before closing your browser.

### To exit the system:

1. Click the **LOGOUT** link on the User Information Navigation Bar near the top of the page. You are logged off the system and the Login page is displayed.
2. Click the x in the upper right corner of your browser window. Your browser window is closed.