Maintaining Contributors, Recipients, and Loan Sources

Step by Step Instructions
Contents

General Information ................................................................................................................................. 3
Public Site Homepage ............................................................................................................................... 4
The Guardian Filer Login ......................................................................................................................... 5
Entity Overview Page ............................................................................................................................. 6
Update a Contributor ............................................................................................................................... 7
Update a Recipient ................................................................................................................................. 12
Update a Loan Source ............................................................................................................................ 17
Need more help? .................................................................................................................................... 22
The guidelines provided here describe one option or a series of steps to complete the task described. (Alternate) steps may be available. The ability to execute the transactions and steps described in this guide will depend upon your user logon security role and the permissions for access you are granted.

Horizontal Page Navigation Tabs are located at the top of the page. Each one has a set of tabs to separate functionality and aid navigation.

<table>
<thead>
<tr>
<th>If you are a...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td>New User of The Guardian</td>
<td>Click Registration Tab</td>
</tr>
<tr>
<td>Registered User of The Guardian</td>
<td>Click the Filer Login Tab</td>
</tr>
</tbody>
</table>
1. Click in the address bar of your web browser and go to https://guardian.ok.gov/PublicSite/HomePage.aspx

The Guardian Public Site Homepage is displayed.

2. Click the Filer Login.
3. Enter **User Name** and **Password**.
4. Click **Login**.

If you forgot your password or username click the “**Forgot your password?**” or “**Forgot your User Name?**” links.

**Important:** Required fields are indicated by a **Red (*) Asterisk**
### Did you know - ?

Each page in The Guardian system has a name that is located under the menu bar. The “Entity Overview” underneath the Home tab is the page name for the first page you see when you log in.

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The **Entity Overview** page displayed. This page displays information related to your candidate or committee.

- Account Status
- Filed Transaction History
- Reports Due
- Document Images

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<table>
<thead>
<tr>
<th>Account Status</th>
<th>Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Filed Ending Balance</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified Contributions</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified In-Kind Contributions</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified Loans, Less Loan Forgiveness</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified Other Funds Received</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified Expenditures</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified In-Kind Expenditures</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified Transfers-In</td>
<td>$0.00</td>
</tr>
<tr>
<td>Unified Transfers-Out</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

Welcome back: JOHN DOE (ID: 8437)

Your registration or renewal fee is due.

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Help with this page

Pay Registration Fee

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To view steps on updating a Contributor, go to page 7.

To view steps on updating a Recipient, go to page 11.

To view steps on updating a Loan Source, go to page 15.
Update a Contributor

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### Steps for Updating a Contributor

1. To get to the Contribution Administration page, click Financial and then Contributions/Transfers-In.
2. The Contribution Administration page allows you to add contributions, add transfer-ins, and find contributions.

Under the Contributor Maintenance section you can search for contributors and modify them as necessary.

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**Contribution Administration**

Welcome back: JOHN DOE (ID: 8629)

[Help with this page]

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**Contribution / Transfer-In History**

This is a list of the 100 most recent contributions and transfers that have been added or updated. New contributions and transfers may be added by clicking the ADD button. If you wish to view or update prior contributions and transfers, click the Find button. To update a specific contribution or transfer, use the links in the ACTION column. To update a Specific Loan or Loan Forgiveness (Contribution) please go to the Loan Work Page.

Click here for information about Offset Records

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**Contributor Maintenance**

By entering the Contributor Maintenance area, you will have the ability to search for a contributor and make any necessary changes to the information that is stored about the selected contributor.

**Update a Contributor**

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3. On the Contribution Administration page, click the Update a Contributor link.

The Contributor Update page is displayed.
4. Select the type of Contributor you want to update:
   a. Business
   b. Candidate Committee (Not Registered)
   c. Commercial Finance Institution
   d. Individual
   e. Political Action Committee (Not Registered)
   f. Political Party Committee (Not Registered)
   g. All Types

**Contributor Update**

Welcome back: JOHN DOE (ID: 8629)

**Help with this page**

<table>
<thead>
<tr>
<th>Type:</th>
<th>All Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>MI</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Suffix</td>
<td></td>
</tr>
<tr>
<td>Organization Name</td>
<td></td>
</tr>
<tr>
<td>Address 1:</td>
<td></td>
</tr>
<tr>
<td>Address 2:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td></td>
</tr>
<tr>
<td>State:</td>
<td></td>
</tr>
<tr>
<td>Zip:</td>
<td></td>
</tr>
<tr>
<td>Employer:</td>
<td></td>
</tr>
<tr>
<td>Occupation:</td>
<td></td>
</tr>
<tr>
<td>External Reference ID</td>
<td></td>
</tr>
<tr>
<td>Committee Number</td>
<td></td>
</tr>
</tbody>
</table>

**Search Results**

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Address</th>
<th>City, State, Zip</th>
<th>External Reference ID</th>
<th>Employer</th>
<th>Occupation</th>
<th>Committee Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>JOHN Doe</td>
<td>Individual</td>
<td>222 APPLEWOOD LN</td>
<td>ANYWHERE, OK 99999</td>
<td></td>
<td>ATT</td>
<td>SALES</td>
<td></td>
</tr>
</tbody>
</table>
Tip to Remember.

All fields marked with a red asterisks (*) are required fields and must be completed before proceeding with the registration process.

Information entered in upper and lower case text will be converted to all Uppercase.

5. Enter the search criteria:
   a. Business or Commercial Finance Institution
      i. Enter the Organization Name
      ii. Enter Address 1
      iii. Enter Address 2 if applicable
      iv. Enter City
      v. Enter State
      vi. Enter Zip
      vii. Enter an External Reference ID if applicable
   b. Candidate Committee, PAC, PPC, Non-Registered
      i. Enter the Organization Name
      ii. Enter Address 1
      iii. Enter Address 2 if applicable
      iv. Enter City
      v. Enter State
      vi. Enter Zip
      vii. Enter an External Reference ID if applicable
      viii. Enter the Committee Number if applicable
   c. Individual
      i. Enter First Name
      ii. Enter Middle Initial if applicable
      iii. Enter Last Name
      iv. Enter the suffix if applicable
      v. Enter Address 1
      vi. Enter Address 2 if applicable
      vii. Enter City
      viii. Enter State
      ix. Enter Zip
      x. Enter Employer Name
      xi. Enter Occupation
      xii. Enter an External Reference ID if applicable

6. Click the Search button.
7. A search results data grid will be displayed on the page displaying all entries with the same search criteria entered.
For this example, Individual type was selected. All Individual Contributors for John Doe are displayed in the Search Results data grid. (This Candidate Committee only has one individual contributor.)
These updates will be applied to all future entries.

To apply to previously entered transactions you must update each individual transaction.

Click Update to update/save the changes. Click Clear to clear all the data from the fields. Click Cancel to go back to the previous page.
Steps for Updating a Recipient

1. To get to the Expenditure Administration page, click Financial and then Expenditures/Transfers-Out.

Expenditure Administration

Welcome back: JOHN DOE (ID: 8629)

Did you know - ?

2. On the Expenditure Administration page, click the Update a Recipient link under the Recipient Maintenance section.

The Recipient Update page is displayed.

3. Select the type of recipient:
   a. Business
   b. Candidate Committee (Not Registered)
   c. Commercial Finance Institution
   d. Individual
   e. Political Action Committee (Not Registered)
   f. Political Party Committee (Not Registered)
   g. Special Function Committee (Not Registered)
4. Enter the search criteria:
   a. Business or Commercial Finance Institution
      i. Enter the Organization Name
b. Candidate Committee, PAC, PPC, Special Function, Non-Registered
   i. Enter the Organization Name
   ii. Enter Address 1
   iii. Enter Address 2 if applicable
   iv. Enter City
   v. Enter State
   vi. Enter Zip
   vii. Enter an External Reference ID if applicable
   viii. Enter the Committee Number if applicable

c. Individual
   i. Enter First Name
   ii. Enter Middle Initial if applicable
   iii. Enter Last Name
   iv. Enter the suffix if applicable
   v. Enter Address 1
   vi. Enter Address 2 if applicable
   vii. Enter City
   viii. Enter State
   ix. Enter Zip
   x. Enter Employer Name
   xi. Enter Occupation
   xii. Enter an External Reference ID if applicable

5. Click the Search button.
6. A search results data grid will be displayed on the page displaying all entries with the same search criteria entered.
For this example, Individual type was selected. All Individual type Recipients for John Doe are displayed in the Search Results data grid. (Pam Contributor was selected to be modified – City and Zip was changed)
These updates will be applied to all future entries.

To apply to previously entered transactions you must update each individual transaction.
Steps for Updating a Loan Source

1. To get to the Loan Administration page, click Financial and then Loans.

Loan Administration

Welcome back: JOHN DOE (ID: 8629)

Did you know…?

1. On the Loan Administration page, click the Update a Loan Source link under the Loan Source Maintenance section at the bottom of the page.

The Loan Source Update page is displayed.
3. Select the type of loan source:
   a. Commercial Finance Institution
   b. Individual
   c. All Types

4. Enter the search criteria:
   a. Commercial Finance Institution
      i. Enter the Organization Name
      ii. Enter Address 1
      iii. Enter Address 2 if applicable
      iv. Enter City
      v. Enter State
      vi. Enter Zip
      vii. Enter an External Reference ID if applicable
   b. Individual
      i. Enter First Name
      ii. Enter Middle Initial if applicable
      iii. Enter Last Name
      iv. Enter the suffix if applicable
v. Enter Address 1
vi. Enter Address 2 if applicable
vii. Enter City
viii. Enter State
ix. Enter Zip
x. Enter Employer Name
xi. Enter Occupation
xii. Enter an External Reference ID if applicable

5. Click the **Search** button.
6. A search results data grid will be displayed on the page displaying all entries with the same search criteria entered.

For this example, All Types was selected. All the loan types for John Test are displayed in the Search Results data grid.
Loan Source Update

Welcome back: JOHN DOE (ID: 8629)

Help with this page

Type: Individual

First Name: JOHN

MI: TEST

Last Name: *

Suffix:

Address 1: *
222 APPLEWOOD LN

Address 2:

City: *
ANYWHERE

State: *
OK

Zip: *
99999

Employer: ATT

Occupation: SALES

External Reference ID:

Update  Clear  Cancel

Click Update to update/save the changes. Click Cancel to go back to the previous page.
Click the Cancel button to return to the Loan Administration page.
If you need more help click [here](#) to see a YouTube video of Contributors, Recipients, and Loan Sources being updated.

If you want to learn about other features of The Guardian go to the [Public Site Home Page](#). From the Public Site Home page go to the [Resources](#) tab, then click [Publications](#) to review other helpful step by step documents.