

Note: You will need Microsoft Excel using this method. Also, you must have at least 10 filers in order to use the Upload feature.

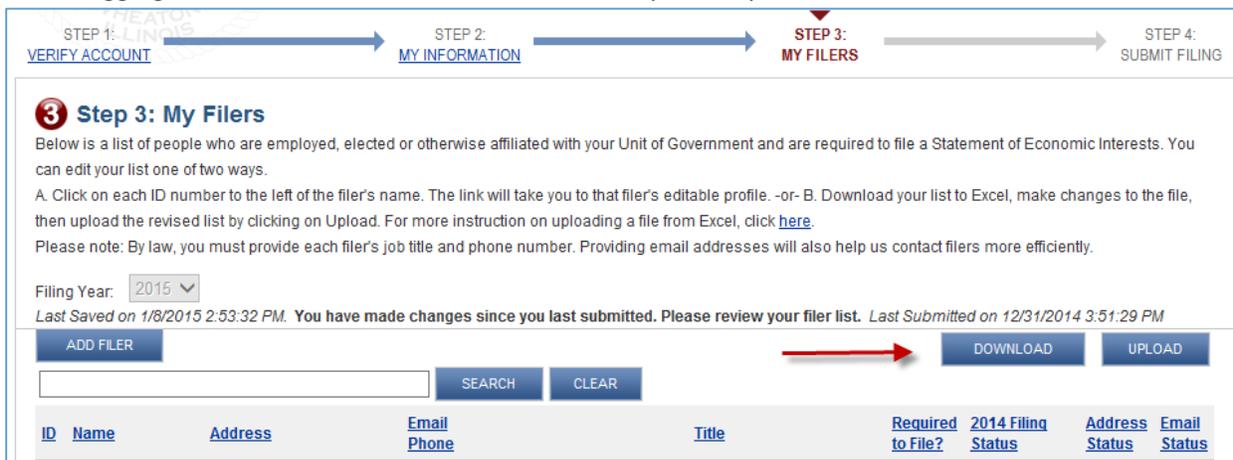
For the first time, the Clerk’s office is offering units of government the option of editing their list in Excel on their own computer or network. This will be especially helpful for agencies with dozens or hundreds of filers. Each year, you will be able download the list from our site, make changes in Excel and upload the list back to our site.

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Step 1: Download the file

1. After logging into the UOG Portal, start with Step 3: My Filers and click on the “Download” button.



2. A popup box will ask you to “Open” or “Save” the file. Select “Save,” identify where you want to save the file on your computer and click “Save.” Another box will open prompting you to “Open” the document. The Excel file will appear and you will see a pre-populated list with 12 columns.
3. **All columns and headers in the download file MUST be in the upload file and in the same order.** The required columns are marked with an asterisk (*): Agency Code; First Name; Last Name; Title; Address1; City; State; Zip; Phone. Optional columns – Filer ID and Email – must be kept in the file even if the fields are blank. **NOTE: Although email is not listed as required, it will be required for filers to reset their password.**
4. Auto-fit the columns to the text:

Statements of Economic Interests - Units of Government Filer List Download/Upload Instructions

- a. Click in the left uppermost corner to highlight worksheet

	A	B	C	D	E
1	COUNTY CLERK				
2	Agency Cc	Filer Id	First Name	Last Name	Title*
3	151	8 PAUL	HINDS	COUNTY C 63	
4	151	8 KATHY	KING	CHIEF DEP 21	

- b. Double click on line between columns A & B to expand columns

	A	B	C	D	E
1	COUNTY CLERK				
2	Agency Cc	Filer Id	First Name	Last Name	Title*
3	151	8 PAUL	HINDS	COUNTY C 63	
4	151	8 KATHY	KING	CHIEF DEP 21	

- c. The columns will automatically expand to fit text in fields.

5. A completed file will look like this:

	A	B	C	D	E	F	G	H	I	J	K	L
1	COUNTY CLERK											
2	Agency Code*	Filer Id	First Name*	Last Name*	Title*	Address1	Address2	City	State	Zip	Email	Phone*
3	151	8 PAUL	HINDS	COUNTY CLERK		630 S. GRANT AVENUE		VILLA PARK	IL	60181	PAUL.HINDS@DUPAGECO.ORG	6304075574
4	151	8 KATHY	KING	CHIEF DEPUTY COUNTY CLERK		3114 CHARLEMAGNE		ST. CHARLES	IL	60174	kathy.king@dupageco.org	6304075574

Step 2: Update the Excel file

Once the Excel file is downloaded to your machine, make the necessary changes following the procedures below.

Deleting Filers

NOTE: Filers should only be deleted if they are no longer required to file.

1. Click on the row number to highlight that row;
2. Right click your mouse, or from the Edit menu, select Delete.
3. Note: When you return to the site, you will be prompted to select a reason why that filer was deleted: Deceased, No Longer Employed; Retired; Not Required to File.

Updating Filers

1. Review all spellings of names
2. Addresses should reflect the filer's home address, not the agency address
3. Enter titles into the Title column
4. Enter emails into the Email column
5. Enter phone numbers into Phone column, without any dashes or parentheses (ex. 6305555555).

Adding a Filer

1. Go to the end of your list and add a filer in a new row
2. Enter the agency code as shown
3. Leave the Filer ID blank. It will be assigned by the Clerk's office
4. Enter the remaining fields.

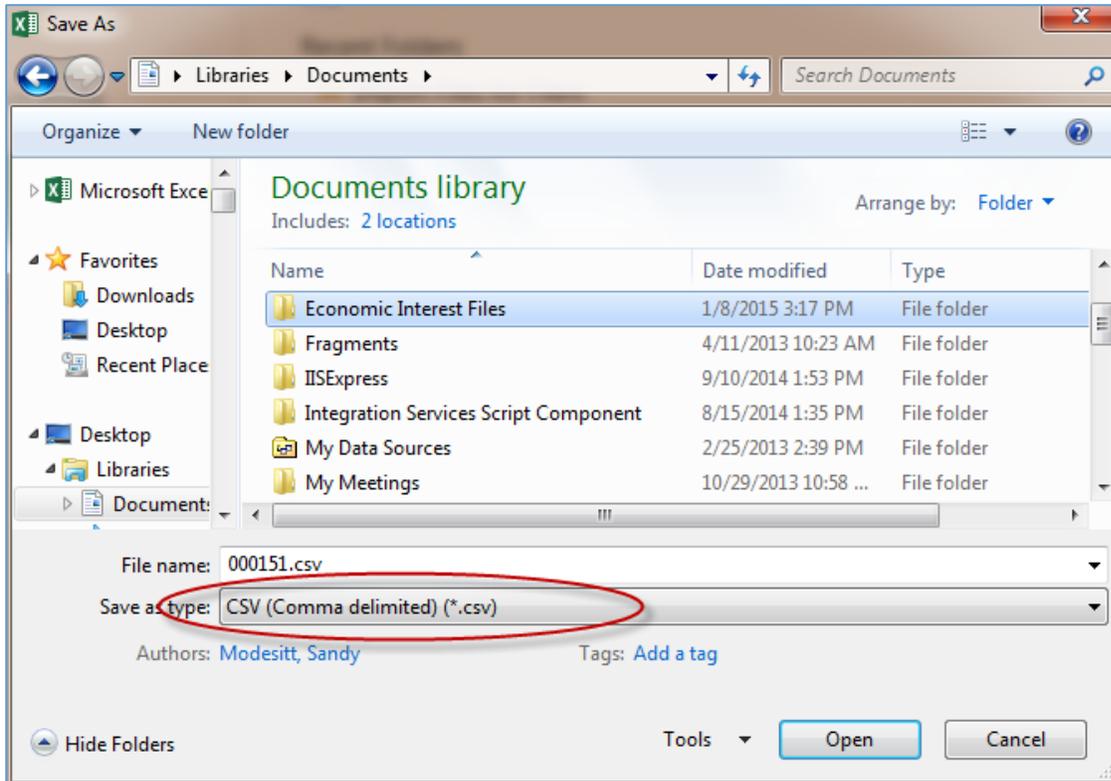
Step 3: Final Steps

Save the File as CSV

1. Select "Save As" from the File dropdown menu
2. Rename your file as you like
3. Pick a location on your computer to store the file

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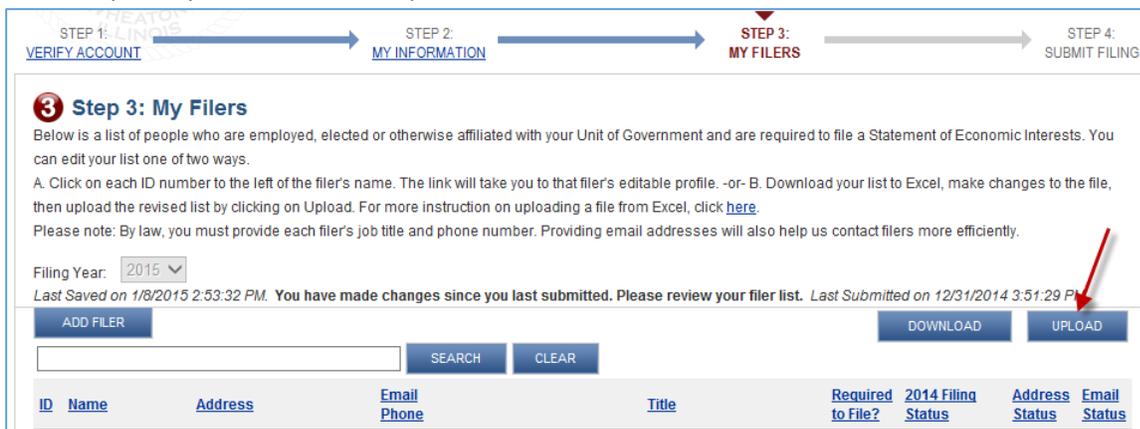
- IMPORTANT! From “Save as type” dropdown, choose “CSV (Comma delimited)”



- Click “Save”
- You may receive an error message that says the file contains features not compatible with CSV. If it asks, “Do you want to keep the workbook in this format?” select “Yes.”

Upload the File

- Return to the Unit of Government Filing site. You may need to log in again.
- From Step 3: My Filers, click on “Upload” button located above the list.



- Click on “Browse” to locate the edited CSV file you just saved to your computer; When you locate the file, click on it and select “Open”.
- The file location will appear in the “Upload File” line. Click “Upload”.
- Success: A green checkmark indicates the file was imported successfully.
- Errors: A red exclamation point indicates an error in the file.
 - Look to the far right of the chart to see the error reason.
 - Correct the error in the Excel file and upload the file again.

