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Introduction

New management reports added to FDM to support the management of the disclosure process and to adhere to OGE reporting requirements.

Previous Release Notes are available on the FDM website at the following link: https://www.fdm.army.mil/helpSupport/releaseNotes.htm.

FDM 8.1.0.9 Enhancements

Pilot Program! Periodic Management Reports

- Review Progress Summary
- Due Date Tracking
- Daily Extension Tracking
- Ethics Training Tracking
- Reports Ready to be Purged

Pilot Program! OGE Agency Management Reports

- Timely Filing & Certification Metrics
- Annual Extension Tracking
- Annual Ethics Training Report
- 2016 FDM SLC-220 Worksheet (SLC Only)
- 2016 FDM DAEO-220 Worksheet (DAEO Only)
Management Reports

New Pilot Program! Management Reports

As part of the continued FDM modernization process, we are introducing 10 new management reports under the New Pilot Program! Management Reports tabs. These new reports consolidate and improve the existing management reports.

Key Change from Release 8.0.2.2

- Initial chart view
- Scope - Show My and Show All
- Ability to download report details into Excel or a .csv file
- View Assigned or Unassigned report information

Who can access the New Pilot Program! Management Reports?

All FDM roles can access the New Pilot Program management reports except for Filers and Filer Assistants.

Note: The management reports introduced in FDM release 5.1 are now located under Standard Reports tab and include the following reports: Registered Filers Summary, Disclosure Report Detail, Filers with No Disclosure Reports, Supervisors’ Org Units and Ethics Training Reports.
Current Management Reports

The current FDM Management Reports are now located under the Standard Reports tab.

Figure 1: Management Reports Menu

DISCLOSURE
- Registered Filers Summary
- Disclosure Report Detail
- Filers with No Disclosure Reports

ADMINISTRATION
- Supervisors’ Org Units

CURRENTLY OVERDUE
- Currently Overdue OGE 450 Annual Reports

SLC-220 WORKSHEET
- 2016 FDM SLC-220 Worksheet

REVIEW METRICS
- Success Score for 450 Certifier

ETHICS TRAINING
- Ethics Training Reports
Pilot Program! Management Reports Menus

There are two new tabs under Management Reports: Periodic reports and OGE Agency Reports. Periodic Management Reports provide a detailed view of how reports are progressing through the submission and review process. FDM Administrators and Ethics Officials can use the OGE Agency Reports to view information that is required for the Annual OGE Agency reports.

Figure 2: Pilot Program! Management Reports Menus
Management Report Filters

The following report filters are available:

- Ability to change FDM role and re-generate report
- Scope allows you to include or exclude specific information from your management report by selecting one of the “scopes” within Set Report Filter.

<table>
<thead>
<tr>
<th>Show My Filer’s</th>
<th>Limits your management report to listing information relevant to the org units for which you are responsible.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show All</td>
<td>Allows you to view all of the relevant information for the Org Units that are assigned to you and other FDM users with the same or lesser role as you.</td>
</tr>
</tbody>
</table>

- View specific report Form types
- View specific historical information by year. Current year is the default.
- View Assigned and Unassigned report information

Figure 3: Pilot Program! Management Report Filers

Show Assigned/Show Unassigned Reports

Some of the new Management Reports allow you to filter by Assigned or Unassigned Reports. Assigned reports are reports assigned by a POC or Ethics Official (450 certifier, SLC, DAEO) Unassigned reports are reports self-started by a filer who has not received a report assignment.
Pilot Program! Periodic Management Reports

The five Periodic Management Reports are:

- Review Progress Summary
- Due Date Tracking
- Daily Extension Tracking
- Ethics Training Tracking
- Report Ready to be Purged

Review Progress Summary

Review Progress Summary consolidates and combines information from the current Registered Filer Summary and Disclosure Detail Report. It provides a single report that displays submission and review status metrics for disclosures in FDM.

Figure 4: Review Progress Summary

[Image of Review Progress Summary report]

- **Description:** Track disclosure reports review progress. To view detailed filer information (name, email, org unit), click Export, then "With Chart(s) (Excel)" or "Data Only (CSV)".

- **Set Report Filter:**
  - Show NY Filer's reports
  - Show ALL Filer's reports
  - Form Type: OGE 278
  - Year: 2017

- **Assigned OGE 278 Review Progress**
  - Total 2017 Assigned - 38
  - Not Started: 16
  - Draft: 1
  - Under Review Amendment in Progress: 1
  - Under Review Filer Signed: 1
  - Under Review Supervisor Signed: 1
  - Under Review SLC Signed: 1
  - Under Submitted to DAO: 2
  - Submitted to DAO: 8
  - Complete: 8
  - Completed Without Signatures: 8

- **Total Assigned Reports - 38**

[Table showing count of each status]
Due Date Tracking

The Due Date Tracking report updates the *Currently Overdue* reports. Use this report to track disclosures as they near the due date or are simply overdue.

**Figure 5: Due Date Tracking Report**

![Due Date Tracking Report](image_url)
Daily Extension Tracking

This report tracks the number of specific extension types (Agency, Combat Zone, and Combination) that have been granted.

**Note:** Some reports may have more than one extension associated to it. If the report count and extension count are not equal, then multiple extensions may have been given for the same report.

Figure 6: Daily Extension Tracking
Ethics Training Tracking

This report counts the specific Ethics Training types, (Annual or Initial) recorded for Filers that are currently, as of report generation, in the Org Units you administer during the selected calendar year.

Figure 7: Ethics Training Tracking
**Reports Ready to be Purged**

This report tracks reports that are ready to be purged (have passed or are about to pass their required retention period). **Show My** displays reports that need to be purged for the person generating the report. **Show All** displays counts for up to 10 Ethics Officials. The Excel Export includes reports for all other FDM users with the same or lesser role as you within your org unit structure.

**Note:** Reports expire six years after the Filer filed (eSigned by the Filer) the report.

**Figure 8: Reports Ready to be Purged**
Pilot Program! OGE Agency Reports

The five OGE Agency Management Reports are:

- Timely Filing & Certification Metrics
- Annual Extension Tracking
- Annual Ethics Training Report
- 2016 FDM SLC 220 Worksheet
- 2016 FDM DAEL-220 Worksheet

Timely Filing & Certification Metrics

This report updates the 450 Certifier Success Score report. Use this report to determine the count of disclosures that were filed and certified in a timely manner in accordance with OGE requirements.

**Note:** Timely filing is defined as the filer eSigning the disclosure prior to or on the due date, plus any extension. Timely certification is defined as: the disclosure is certified on or before 60 days after the filer’s last signature.

**Figure 9: Timely Filing and Certification Metrics**

![Timely Filing and Certification Metrics](image)
Annual Extension Tracking

This report tracks the total number of extensions provided for OGE 450 and OGE 278 reports in FDM over the past 6 years in FDM.

Figure 10: Annual Extension Tracking Report

![Annual Extension Tracking Report](image-url)
Annual Ethics Training Report

This report tracks ethics training recorded for filers who were assigned reports in your Org Units during the selected calendar year.

**Note:** The Excel Export of this report ties the filer’s ethics training record to a disclosure report.

**Figure 11: Annual Ethics Training Report**

![Annual Ethics Training Report](image_url)
2016 FDM SLC-220 Worksheet

This worksheet shows information available in FDM regarding disclosure reports (i.e., OGE 278, OGE 450), ethics training recorded for Filers you support, and Filers in the Org Units/Subordinate Org Units where you are the SLC. It will aid you in filling out part of the annual agency report to OGE. You will need to supplement this worksheet when preparing your part of the annual agency ethics report. Army will be using an online submission, and separate instructions will include a link.

Figure 12: 2016 FDM SLC-220 worksheet
This worksheet shows information available in FDM regarding disclosure reports (i.e., OGE 278, OGE 450), ethics training recorded for Filers you support, and Filers in the Org Units/Subordinate Org Units where you are the DAEO. It will aid you in filling out part of the annual agency report to OGE. You will need to supplement this worksheet when preparing your part of the annual agency ethics report. Army will be using an online submission, and separate instructions will include a link.

Figure 13: 2016 FDM DAEO 220 Worksheet
Exporting Data into Excel or `.csv` file

Use the Export feature to view the underlying detailed information of any FDM Management report. You can export the management report data into an Excel Spreadsheet or a CSV (Comma Separated Value) file. Exporting a report into Excel allows you to filter data by Filer name, Filer email address, Org Unit, report status, review status, assigned or unassigned status as well as report amendment status.

**Note:** Exports to excel include information for both Assigned and Unassigned reports on the Data tab for some management reports.

**Note:** The `.csv` files, or comma separated values files, can be used in Excel or other data management applications.

**Filtering and Sorting Data in Excel**

You can easily reorganize exported data by using the filtering and sorting functions in Excel. Sorting data rearranges your data based on particular defined criteria. You can filter exported management reports in Excel to see the data they way you want and to find information quickly. Each FDM Data tab is organized into different columns identified by header cells with drop down arrows beside each column header.

**Note:** Filtered results can be cleared at any time to re-display all rows that the filtering temporarily suppressed.
To filter an exported report:

1. Click **Enable Editing** button at the top of the Excel page.

2. Select the column header drop-down arrow you wish to filter. The Filter menu displays.

3. Uncheck the box beside **Select All** to deselect all data.

4. Check the boxes beside the data you want to filter and then click **OK**. The data will be filtered, temporarily hiding any content that does not match the selected criteria.

**Note:** You can also access filtering options from the Sort & Filter command on the Home tab in Excel.

You can apply multiple filters by selecting the dropdown arrow in multiple columns and deselecting/selecting specific data in the column to display.
To clear a filter:

5. Click the **Dropdown arrow** for the filter you wish to clear and select **Clear Filter** from in the Filter menu. The previously hidden data will redisplay.

**Sort Exported Data in Excel**

When you sort data, you are not changing the raw data on your excel worksheet, you are merely changing the display of the data. Sorting organizes data by one column.

To quick sort data in a column:

1. Click **Enable Editing** button at the top of the page.

2. Select the column header drop-down arrow you wish to sort. The Filter menu displays.

3. Select **Sort A to Z** and then click **OK**. The data sorts by the selected column.
Defects and Changes

**FDM 712** – The filer role removal notification message has been updated to direct filers to contact their legal advisor if they still require access to FDM.

**FDM 721** – The Application Error message has been updated to include instructions to close and re-open the browser.

**FDM 811** – New filers are no longer listed as untrained in previous year on the Ethics Training Not Trained list.

**FDM 1491** – On the Remind Supervisor page, “Show Filer’s Reports for My Orgs” was replaced with “Show Supervisor’s for My Orgs.”

**FDM 1865** – The Incorrect Certifier Assistant message removed from Worklist/Org Unit View.

**FDM 1928** – The links to FDM Tutorials in the Report Ready for Your Review Notification have been updated.

**FDM 1976** – The link to the OGE 450 form was updated to Getting Started Common Questions.

**FDM 1984** – Confirmation message now displays when a user tries to remove report assignment.

**FDM 1955** – OGE 450 instructions were updated to reflect verbiage changes in the new OGE 450 form.