MANAGEMENT REPORTS



The following management reports are available in FDM:

Periodic Management Reports

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

OGE Agency Management Reports

- Timely Filing & Certification Metrics
- Annual Extension Tracking
- Annual Ethics Training Report

Legacy Management Reports

- Registered Filers Summary
- Disclosure Report Detail
- Filers with No Disclosure Reports
- Supervisors' Org Units
- Currently Overdue OGE 450 Annual Reports
- Success Score for 450 Certifier
- Ethics Training Reports

Each standard report can be run by selecting filter options and then clicking 'Generate Report.

Generating a Management Report

To generate a Management Report:

- 1. Click Management Reports and then select one of the Management Report tabs.
- **2.** Select the appropriate report filter(s).
- 3. Click Generate Report.
- 4. After generating a report, click **Export** then select **Export to Excel** or **Export to .csv**.

Review Progress Summary	(
8 2 450 Certifier Change ▼	?
Description: Track disclosure reports review progress. To view detailed filer information (name, email (s) (Excel)" or "Data Only (CSV)". Navigate to the appropriate C	il, org unit), click Export, then "With Chart Org Unit
My Orgs » DLA » TOP LEVEL ORG -SELECT-Next Level Down	Select report filers and
Set Report Filter	then Generate Summary
○ Show MY Filers' reports	Year: 2018 V Generate Summary
	Show Unassigned Reports Export -
Assigned OGE 450 Review Progress Total 2018 Assigned - 16	Export to Excel
Not Started	10
Draft 1	
Under Review - Amendment in Progress 2	

Working in Excel

- 1. Click **Open** to open the file in Excel.
- 2. Click the **Enable Editing** and then select the **DATA** tab to sort and filter the data.
 - **NOTE:** You can use any of Excel's features/tools to sort and filter your data.

Filtering Data in Excel

- **3.** Click the arrow in the column heading you wish to filter.
- 4. Select the items you wish to filter on.

Sorting Data in Excel

 Select the column header drop-down arrow that you wish to sort on and then select Sort A to Z and then click OK. The data is sorted by the selected column.

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278_1073 R	training_278		ОК	Cancel	2017	Incumbent OGE 278
278_1073 R	training_278	· · · · · ·			2017	New Entrant OGE 278

Printing a Report

For Periodic and Agency reports:

- **1.** Generate a report and then Export to Excel.
- 2. Select File and then Print.

For Legacy Reports:

- 1. Generate a report and then click on the Printer
- 2. Friendly link and then click Print to print the report.

Saving a Report

For Periodic and Agency reports:

- 1. Generate a report and then Export to Excel
- 2. Select Save .

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New	Click Save		
Open	Documents » FDM » Training » 2018 Documentation » 2018 QRCs » Management Reports		
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MANAGEMENT REPORT DESCRIPTIONS

Report Name	Report Description
Periodic Reports	
Review Progress Summary	The 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 reports in FDM. Use this report to track how many reports for the selected year have or have not been submitted, along with their review progress.
Due Date Tracking	The Due Date Tracking report consolidates Filers with No Disclosures and Currently Overdue reports. Use this report to track reports as they near the due date or are simply overdue
Daily Extension Tracking	This report tracks the number of reports that have extensions. Some reports may have more than one extension granted to them.
Ethics Training Tracking	This report counts the specific Ethics Training Types (Annual or Initial)recorded for Filers that are currently in the Org Units you administer during the selected calendar year.
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,)
OGE Agency Reports	
Timely Filing & Certification Metrics	This report updates the <i>450 Certifier Success Score</i> report. Use this report to determine the count of reports that were filed and certified in a timely manner in accordance with OGE requirements. Timely filing is defined as the Filer eSigning prior to or on the due date, plus any extension. Timely certification occurs when the report is certified on or before 60 days after the Filer's last signature.
Annual Extension Tracking	This report tracks the total number of extensions provided for OGE 450 and OGE 278 reports in FDM over the past six years in FDM.
Annual Ethics Training Report	This report tracks ethics training recorded for Filers that were in your Org Units during the selected calendar year. The Excel export of this report ties the Filer's ethics training record to a report in FDM.

Legacy Reports	
Registered Filers Summary	The Registered Filer Summary provides a summary of your current Filer's submission status by Form Type and Year. Use this report to track how many Filers for the current year have or have not submitted reports in FDM.
Disclosure Detail Report	The Disclosure Detail Report provides reporting and reviewing status detail by org unit, form type and year. Use this report to track review progress of Filers' reports.
Filers with No Disclosure Reports	Filers with No Disclosure Report lists any registered Filers who have not started a report, assigned or not assigned, by the specified year and report type. This report facilitates the annual data cleanup process prior to the upcoming filing season. Use this report to track delinquent filers and manage Filer-org unit associations.
Supervisor's Org Units	The Supervisor's Org Unit report provides a listing of Supervisors and the org units they are assigned to in FDM. This report facilitates the annual data cleanup process prior to the upcoming filing season. Use this report to manage Supervisor to org unit associations. You should consider deleting an org unit if a Supervisor is listed for an org unit that has no Filers.
	org unit has sub org units listed, then you must first delete or move the sub org units before deleting the Supervisor's Org Unit.
Currently Overdue OGE 450 Annual Reports	The Currently Overdue OGE 450 Annual Reports can be used by DAEOs, SLCs and 450 Certifiers to view data about late annual reports for the current year. A report will display if it was assigned, has a Review Status of Not Started or Draft, or the reporting due date has already passed.
Success Score for 450 Certifier	This report shows 450 Certifiers their review progress with regards to the Office of Government Ethics' 60-day review rule. FDM displays for 450 Certifiers a summary table and a Success Score. The Review Progress Summary is available under Management Reports Review Metrics .
Ethics Training Reports	The Ethics Training Report allows you to view current and prior years' Ethics Training information for Filers who were recorded in your org units during the selected calendar year.