

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
- ◆ Disclosure Detail Report

## OGE Agency Management Reports

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

## Legacy Management Reports

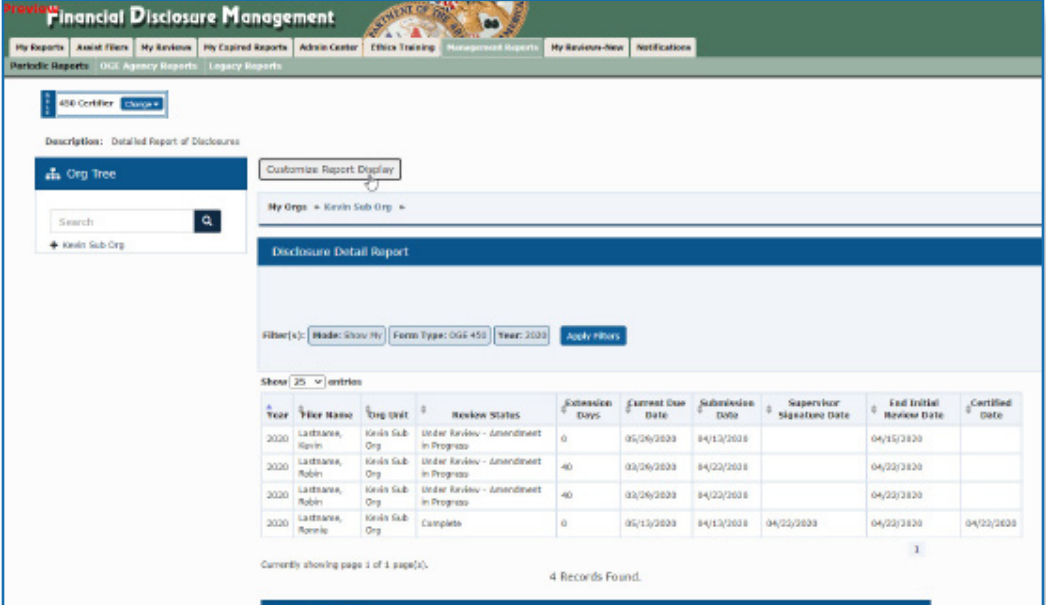
- ◆ Registered Filers Summary
- ◆ Disclosure Report Detail
- ◆ Filers with No Disclosure Reports
- ◆ Supervisors' Org Units
- ◆ Currently Overdue OGE 450 Annual Reports
- ◆ Success Score for 450 Certifier
- ◆ Ethics Training Reports

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. Go to **Management Reports** and then select one of the Management Report tabs.
2. Select an Org Unit in the Org Tree.
3. Select the appropriate report filter(s) and click **Apply Filters** to generate a report.
4. After generating a report, click **Export** then select **With Chart(s) (Excel)** or **Data Only (CSV)**.



The screenshot shows the FDM web application interface. The main content area displays the 'Disclosure Detail Report' for the year 2020. The report includes a table with the following columns: Year, Filer Name, Org Unit, Review Status, Extension Days, Current Due Date, Submission Date, Supervisor Signature Date, End Initial Review Date, and Certified Date. The table contains 4 records.

Year	Filer Name	Org Unit	Review Status	Extension Days	Current Due Date	Submission Date	Supervisor Signature Date	End Initial Review Date	Certified Date
2020	Ludmann, Kevin	Kevin Sub-Org	Under Review - Amendment in Progress	0	05/04/2020	04/13/2020		04/15/2020	
2020	Ludmann, Robin	Kevin Sub-Org	Under Review - Amendment in Progress	40	02/04/2020	04/02/2020		04/02/2020	
2020	Ludmann, Robin	Kevin Sub-Org	Under Review - Amendment in Progress	40	02/04/2020	04/02/2020		04/02/2020	
2020	Ludmann, Robin	Kevin Sub-Org	Complete	0	05/13/2020	04/13/2020	04/22/2020	04/22/2020	04/22/2020

Currently showing page 1 of 1 page(s). 4 Records Found.



# MANAGEMENT REPORT DESCRIPTIONS

## Periodic Reports

Review Progress Summary	The Review Progress Summary 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 tracks 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).
Disclosure Detail Report	The Disclosure Detail Report provides reporting and reviewing status details by Org Unit, form type, year and various other customizable filters. Use this report to track review progress of Filers' reports.

## OGE Agency Reports

Timely Filing & Certification Metrics	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.