

Financial Disclosure Management

7.0.2.2.5 Release Notes

April 2016

[Export Ethics Training Reports to Excel](#)
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Introduction

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

Release 7.0.2.2.5 implements these enhancements:

- **Export Ethics Training Reports to Excel**
- **Export Disclosure Detail Report to Excel**

Export Ethics Training Reports to Excel

POCs and Reviewers, who track and monitor ethics training in FDM, can now export Ethics Training information entered into FDM to an excel worksheet. The following Ethics Training reports can be exported to excel:

- Ethics Training – Not Trained
- Ethics Training – Filers Trained
- Ethics Training - Exceptions

To export ethics training to excel from the Not Trained or the Exceptions tab, click **Export to Excel** once the list of filers displays, then, select either **Open, to view the file,** or **Save, to save the file.**

Figure 1. Ethics Training – Not Trained with Export to Excel

The screenshot shows the 'Filers Not Trained' interface. At the top, there are navigation tabs: My Info, My Reviews, Admin, Ethics Training, Management Reports, Resources, and Log Out. Below these are sub-tabs: Not Trained, Trained, Exceptions, and Training Reports. The main heading is 'Filers Not Trained'. A search box contains 'Senior Legal Counsel' with a 'Change' button. Below the search box are search filters: 'Org Unit: My Orgs >' with a dropdown menu set to 'Confidential Filers', and two radio buttons: 'Show Filers for Confidential Filers' (unselected) and 'Show My Filers' (selected). There is also a checkbox for 'Include Filers for Org Units assigned to other Senior Legal Counsels' which is checked. Search criteria include 'Calendar Year' (2016), 'Last Name Starts With', 'Last Name', and 'First Name'. 'Search' and 'Reset' buttons are present. A table below shows a list of filers with columns for Name, Org Unit, and Filer Role(s). An 'Export to Excel' button is circled in red. A callout bubble points to the 'Search' button with the text: 'Click Search to list your Filers and then click Export to Excel.' Another callout bubble points to the 'Open' and 'Save' buttons in a file dialog with the text: 'Click Open or Save to work with Ethics Training in Excel.' The file dialog at the bottom asks: 'Do you want to open or save FilersNotTrained.xls from fdm-preview.army.mil?' with 'Open', 'Save', and 'Cancel' options.

Figure 2. Filers Not Trained in Excel

	A	B	C	D	E	F	G	H
1	Name	Org Unit	Filer Role(s)					
2	450_10, Training X	North East~ 1	450 Filer					
3	450_13, Training X	North East~ 1	450 Filer					
4	450_14, Training X	North East~ 1	450 Filer					
5	450_30, Training X	North East~ 1	450 Filer					
6	Day, Summer X	Central North	450 Filer					
7	Edsel, Ford X	South East Region	278 Filer					
8	Mello, Cara X	Confidential Filers	450 Filer					
9	MonHead, Lee X	South East Region	450 Filer					
10	Rhodes, Dusty X	Central North	450 Filer					
11	Romeo, Alfa X	West Coast	450 Filer					
12	Sea, Stormy X	Confidential Filers	450 Filer					
13	Storm, Raine X	North East Region	278 Filer; 450 Filer					
14	Tuesday, Ruby X	Confidential Filers	450 Filer					
15	Vader, Ella X	Central North	450 Filer					
16	Winds, Gail X	North East Region	278 Filer; 450 Filer					
17	Wynd, Augusta X	North East Region	450 Filer					
18	Zuki, Sue X	West Coast	450 Filer					
19								
20								
21								
22								

Export Disclosure Detail Report to Excel

Administrative and legal FDM users, who are monitoring filing and reviewing progress, can now export the Disclosure Detail Report to an excel worksheet.

To export the Disclosure Detail report to excel, click **Export to Excel to generate the report**. Once the report is generated, select either **Open**, to view the report, or **Save**, to save the report to a file.

Figure 3. Disclosure Report Detail – Export to Excel

The screenshot shows the 'Disclosure Report Detail' interface. At the top, there are navigation tabs: My Info, My Reviews, Admin, Ethics Training, Management Reports, Resources, and Log Out. Below these are sub-tabs: Disclosure, Administration, Currently Overdue, SLC-220 Worksheet, and Review Metrics. The main content area is titled 'Disclosure Report Detail' and includes a dropdown for 'Senior Legal Counsel' (set to 'Senior Legal Counsel') and a 'How Do I...' button. Below this is a section for 'Select an Org Unit and Scope' with 'Org Unit: My Orgs' and a dropdown for 'Confidential Filers'. There are radio buttons for 'Show Filers for Confidential Filers' and 'Show My Filers', and a checked checkbox for 'Include Filers for Org Units assigned to other Senior Legal Counsels'. The 'Set Report Filter' section includes dropdowns for 'Form Type: OGE 278', 'Year: 2015', 'Reporting Status: All', and 'Review Status: All', along with a 'Generate Report' button. A callout box points to the 'Generate Report' button with the text: 'Click Generate Report to list your Filers and then click Export'. Below the filters is a 'Report Results' table with columns for Year, Filer, Filer E-mail, Submission Date, Reporting Status, Review Status, Supervisor, and Signed By. The table contains three rows of data and a total row. A callout box points to the 'Export to Excel' button in the table with the text: 'Click Open or Save to work with Ethics Training in Excel.' At the bottom, a file save dialog is open, asking 'Do you want to open or save DisclosureReport.xls from fdm-preview.army.mil?' with 'Open', 'Save', and 'Cancel' buttons. A 'Summary Results' table is partially visible at the bottom.

Year	Filer	Filer E-mail	Submission Date	Reporting Status	Review Status	Supervisor	Signed By				
							Supvr	SLC	SLC EC	DAEO	DAEO EC
2015	Edsel, Ford X	F.Edsel@FDMSandbox.com	03/01/2016	New Entrant	Under Review - Amendment in Progress*	Mello, Cara					
2015	Edsel, Ford X	F.Edsel@FDMSandbox.com	04/07/2016	Incumbent	Under Review	Mello, Cara		**	**		
2015	Storm, Raine X	R.Storm@FDMSandbox.com	11/25/2015	New Entrant	Complete	Edsel, Ford	11/25/15			11/25/15	
Total:	2				3	eSigned:	1	0	0	1	0
					Amendment in Progress: 1						
					Completed w/o Filer's Signature		-	-	-	0	-
							0	0	0	0	0

Reporting Status	Total	Draft	Under Review	Submitted to	EO	Complete			
Total	3	0	0.00%	2	66.67%	0	0.00%	1	33.33%

Figure 4. Disclosure Report Detail in Excel

The screenshot shows an Excel spreadsheet titled "DisclosureReport [Read-Only] [Compatibility Mode] - Excel". The spreadsheet contains a table with the following data:

Year	Filer	Filer E-mail	Submission Date	Reporting Status	Review Status	Supervisor	Signed By Supervisor	Signed By SLC	Signed By SLC EC	Signed By DAE0	Signed By DAE0 EC
2015	Edsel, Ford X	F.Edsel@FDMSandbox.com	03/01/2016	New Entrant	Under Review - Amendment in Under Review	Mello, Cara					
2015	Edsel, Ford X	F.Edsel@FDMSandbox.com	04/07/2016	Incumbent	Under Review	Mello, Cara		**	**		
2015	Storm, Raine X	R.Storm@FDMSandbox.com	11/25/2015	New Entrant	Complete	Edsel, Ford	11/25/15			11/25/15	

The spreadsheet also shows a ribbon with tabs for FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ApproveIt, and ACROBAT. The bottom status bar indicates "READY" and "100%" zoom.