# **Financial Disclosure Management**

8.1.0.9 Release Notes

Publication 1.0 October 2017

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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: <u>https://www.fdm.army.mil/helpSupport/releaseNotes.htm</u>.

# 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**

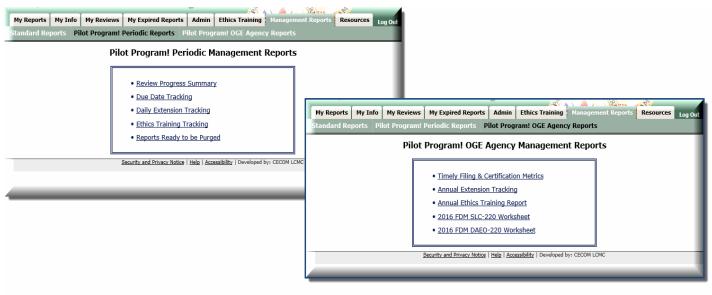
The current FDM Management Reports are now located under the Standard Reports tab.

Standard Management Reports										
Current FDM Management Reports	New FDM Management reports with charts									
	Success Score for 450 Certifier  ETHICS TRAINING  Ethics Training Reports									

Figure 1: Management Reports Menu

#### **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**

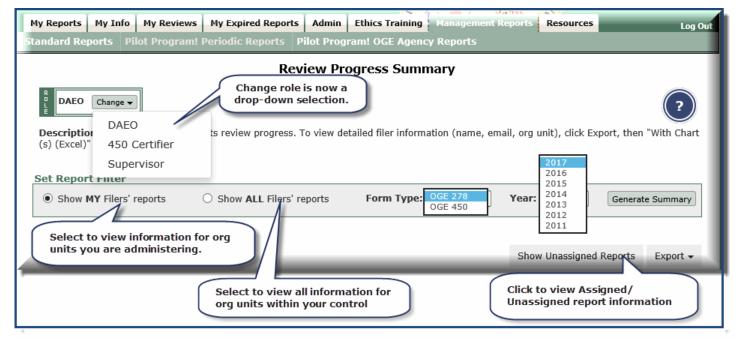
The following report filters are available:

- 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.

Show My Filer's	Limits your management report to listing information relevant to the org units for which you are responsible.
Show All	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.

- 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

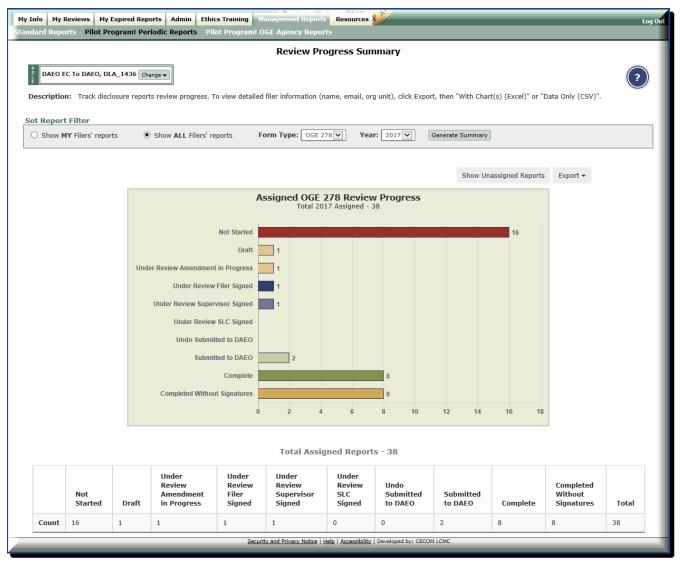
The five Periodic Management Reports are:

- 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



### 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

My Info My Reviews M	ly Expired Re			nagement Reports	esources							
Standard Reports Pilot F		·						Log Out				
	Due Date Tracking											
DAEO EC To DAEO, E	DAEO EC To DAEO, DLA_1436 Change -											
Description: Track disclosure reports that are not currently submitted (i.e., eSigned) by the filer as of today's date. To view detailed filer information (name, email, org unit, etc.), click Export, then "With Chart(s) (Excel)" or "Data Only (CSV)".												
Set Report Filter												
Show MY Filers' rep	oorts	O Show ALL File	ers' reports For	rm Type: OGE 278	] Year: 2017 ▼	Generate Report						
Show Unassigned Reports Export -												
			Ass	igned OGE 278 I	Due Date Trackii	ng						
				Total 2017 As	signed - 12							
		Due	in more than 90 days, 3									
				7		Overdue, 7						
			(									
			t									
			Due in 46-90 days, 1									
				$\boldsymbol{\boldsymbol{\zeta}}$								
			Due in 2-15 day									
			Due III 2-15 day	/5, 1								
				Total Assigned	Reports - 12							
	Overdue	Due Today	Due in 2-15 days	Due in 16-30 days	Due in 31-45 days	Due in 46-90 days	Due in more than 90 days					
7		0	1	0	0	1	3					
			Security	and Privacy Notice   Help	Accessibility   Developed by:	CECOM LCMC						

### **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

My Info My Reviews M	Info       My Reviews       My Expired Reports       Admin       Ethics Training       Management Reports       Resources       Log Out         ard Reports       Pilot Program! Periodic Reports       Pilot Program! OGE Agency Reports       Difference       Pilot Program! Periodic Reports       Pilot Program! OGE Agency Reports									
	Daily Extension Tracking									
Ē	, DLA_1436 Change  v iisclosure reports that have extensions as of today'	s date. To view detailed filer information (name, em	ail, org unit, etc.), click Export, then	"With Chart(s) (Excel)" or "Data						
Show MY Filers' rep	eports O Show ALL Filers' reports F	form Type: OGE 278 V Year: 2017 V	Generate Report							
	(so Combination, 2	OGE 278 Extension Tracking Total 2017 Reports with Extensions - 7 ome reports may have more than one extension)		Export •						
	(some r Agency Extension(s)	Total Reports with Extensions - 7 reports may have more than one extens Combat Zone Extension(s)	sion) Combination							
2	2	3	2							
	Securi	ity and Privacy Notice   <u>Help</u>   <u>Accessibility</u>   Developed by: CECC	DM LCMC							

### **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

Pinancial	Financial Disclosure Management											
	Info     My Review     My Expired Reports     Admin     Ethics Training     Management Reports     Resources     Management Reports     Log On       Indard Reports     Pilot Program! Periodic Reports     Pilot Program! OGE Agency Reports     Pilot Program! OGE Agency Reports											
	Ethics Training Tracking											
E     Description: Track E	450 Certifier EC To 450C, DLA_1426 Change Description: Track Ethics Training information recorded for filers that were in your Org Units during the selected calendar year. To view detailed filer information (name, email, org unit, etc.), click Export, then "With Chart(s) (Excel)" or "Data Only (CSV)".											
Set Report Filter												
O Show MY Filers	Show ALL Filers For	orm Type: OGE 450 Year: 2	Generate Repor	t								
					Export							
	DGE 450 Ethics Training 2 Total 2017 Filers - 27											
		Total F	ilers - 27									
	Initial Training	Annual Training	Exception	Not Trained	Total							
2	2	3	1	21	27							
		Security and Privacy Notice   Help	<u>Accessibility</u>   Developed by: CE	COM LCMC								

#### **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

- Financial P	isciosur	e Management 🛛 🍂	00			
ly Info My Reviews My E andard Reports Pilot Pro	xpired Reports ogram! Period			_		Log Out
		Reports	Ready to be Purged			
		y to be purged (have passed or are about to p	ass their required retention period). Re	ports expire six years after the	Filer filed (eSign	ed by the Filer) the
report. Show All displays counts f						
•		ion (name, email, etc.), click Export, then "With Reports   Purge Reports.	Chart(s) (Excel)" or "Data Only (CSV)			
• • • • • •	o My Expired	Reports   Purge Reports.				
Set Report Filter	arts (i) a	Show ALL Expired reports Form Type: (	DGE 278 Generate R	nort		
	xpired more tha xpired in past 6	an 60 Days ago 10 Days			Export •	
Ex	(pires in 60 Day	ys				
		Expired R	Reports to be Purged			
	2					
	1					
	0					
	S	iec, ASD1 Sec, ASD101 Sec, ASD102	Sec, ASD105 Sec, ASD107 Sec	ASD108 Sec, ASD110		
		Τα	tal Reports - 7			
		Expired more than 60 Days ago	Expired in past 60 Days	Expires in 60 Days	Total	
Sec,	ASD1	0	1	0	1	
	ASD101	1	0	0	1	
	ASD102	0	1	0	1	
	ASD105	0	1	0	1	
	ASD107	0	1	0	1	
	ASD108	0	0	0	1	
Sec,			ce   <u>Help</u>   <u>Accessibility</u>   Developed by: CECOM I		*	

# Pilot Program! OGE Agency Reports

The five OGE Agency Management Reports are:

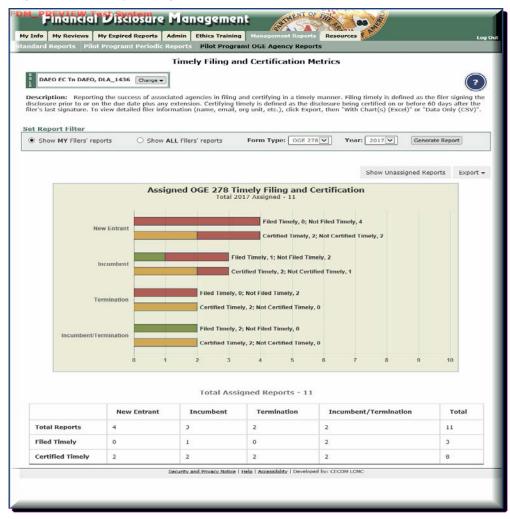
- Timely Filing & Certification Metrics
- Annual Extension Tracking
- Annual Ethics Training Report
- ✤ 2016 FDM SLC 220 Worksheet
- 2016 FDM DAEL-220 Worksheet

#### **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



### **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

- Pinancia				Start Sa	AL PROVINCE							
My Info My Reviews Standard Reports Pil	My Expired Repo ot Program! Peri		nics Training Ma Vilot Program! OG	nagement Reports	Resources 🔛		Log Out					
	Annual Extension Tracking											
DAEO EC To DAEO	DAEO EC To DAEO, DLA_1436 Change -											
<b>Description:</b> Track	Description: Track the total number of extensions applied for the past 6 years as of today's date. To view detailed filer information (name, ema org unit, etc.), click Export, then "With Chart(s) (Excel)" or "Data Only (CSV)".											
	xport, then with											
Set Report Filter	extensions	Show ALL Filer	s' extensions	Form Type:	DGE 278 🗸	Generate Report						
Non-SGE							Export 👻					
SGE												
		OGE 2	78 Annual Ex Total Extens		king							
18							_					
16							_					
14							_					
12												
10												
8	16											
6												
2		3										
0		2			1		_					
	2017	2016	2015	2014	2013	2012						
			Total Exten	sions - 16								
	2017	2016	2015	2014	2013	2012	Total					
SGE	0	3	0	0	0	0	3					
Non-SGE	16	2	0	0	1	0	19					
_		Security and F	Privacy Notice   <u>Help</u>   <u>/</u>	Accessibility   Develope	d by: CECOM LCMC		_					

### **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

My Info My Reviews My Expired Reports Admin Ethics Tra	ining Management Reports Resources Log Out
Standard Reports Pilot Program! Periodic Reports Pilot Program!	ogram! OGE Agency Reports
DAEO EC To DAEO, DLA_1436 Change	Ethics Training Report         Image: State of the selected calendar year. To view detailed         "With Chart(s) (Excel)" or "Data Only (CSV)".         De: OGE 278 V         Year: 2017 V         Generate Report
	Show Unassigned Reports Export -
Assigned	OGE 278 Ethics Training ilers with Assigned Reports - 20
	Trained, 10.0% Month Trained, 90.0%
Total Filers	with Assigned Reports - 20
Trained	Not Trained
10.00%	90.00%
Security and Privacy No.	stice   Help   Accessibility   Developed by: CECOM LCMC

#### 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

FDM_	Plind	ncial Disci	osure	Mana	gemer	nt	BIMEN	T OF THE	00 3	
	_	eviews My Expired I				_	ment Re	ports Reso	urces	Log Out
Stand	ard Repor	ts Pilot Program!	Periodic R		Pilot Progra					_
				201	L6 FDM S	LC-220	works	sneet		
0.4		gal Counsel Change 🗸								(?)
Ins OGI sho ann	tructions 278, OGE uld aid you ual agency	for the Legal Office 450), ethics training in filling out part of t ethics report. Army in	Senior Le recorded f he annual will be usin	gal Couns or Filers yo agency rep g an online	el (SLC): u support, a ort to OGE. : submission	1) This wor nd Filers in 2) You will and separa	ksheet sl the Org need to s te instru	hows informa Units/Subord supplement th ctions will inc	tion available in FD inate Org Units when is worksheet when lude a link to that s	M on disclosure reports (i.e., sre you are the SLC. It preparing your part of the ite.
						erate Worksł				
	ew Ethic: ick here to	view detailed lists of	filers count	ted as requi	ired to receiv	ve and actu	ally recei	ived ethics tr	aining in Part 3 Edu	cation and Training questions.
										Export -
		Worksheet covers Note: Report only						150 X is Leg	al Office SLC:	
Part 1.	Question	Question Text and ORGANIZATION/R Number of Special G	ESOURCE:	5	(SGE) show	n in FDM fo	or reports	s during 2016	as of December 31	1, 2016: <u>0</u>
з.		EDUCATION AND T								
	1. 2.	From the FDM Ethics From the FDM Ethics training:	Training ta Training ta	ab, number ab, number	of Filers sho of Filers sho	wn who ac	tually re re requir	eceived initia red to receive	I ethics orientation: , and Filers who ac	: <u>0</u> tually received annual ethics
		l l		Required t Training	o Receive A	Annual Eth	ics Ac	tually Recei	ve Annual Ethics	
		Public Filers (OGE 27 non-PAS	101	D			0			
		Confidential Filers (C 450)					0			
	3.	Training methods use Distribution of w			ning:					
		Video presentatio	on							
		Satellite broadca		onferencli	ng					
		Classroom instru								
		Computer/web-t	ased train	ning						
	4.	Other Training materials us	od for your	athics train	nina					
	4.	Copies of the Sta				cy supple	mental r	regulations		
		Summaries of the		ds of Cond	uct					
		Pamphlets/Brock	nures							
		Posters								
		Case studies								
		Videos Message from Ag	iency Lead	lership						
		Other								
6.		PUBLIC FINANCIA	DISCLOS	URE						
	1.	number of reports ac	tually filed.		ancial disclos	ure reports	(OGE 2	78) required (		excluding SGEs, and the
		E	tominee/I Intrant Required	Filed	Incumben Required		Termin	ed Filed	Termination Required File	
		PAS		0	0	0	0	0	0 0	u
		Non-Career SES 0 Career SES 0	)	0	0	0	0	0	0 0	
		Schedule C C Other C		0	0 0	0	0	0	0 0	
	2.	Number of public fina				vith reports	in FDM :	showing filing	extensions: 0	
7.	1.	CONFIDENTIAL FIR The number of confid employees in 2016, d	lential finar	ncial disclos	ure reports	OGE Form	450) she	own in FDM a	s required to be file	d by permanent full-time
		employees in 2016, 0	Actualing S	ocs, and th	Confident				nom.	
		OGE Form 450			Required 3			Filed Not Availab		
		OGE Form 450A Alternate OGE appro	ved form		Not Availab Not Availab			Not Availab	le	
	2.	Number of confidenti						FDM showing	filing extensions:	2
8.	1.	ADVISORY COMMI In FDM the number of committee members who actually filed.	of SGEs (as	shown on I	the Filer's Co	ontact Infor	mation s	creen when p ile financial d	preparing the report isclosure reports in	) who served as advisory 2016 and the total number
			Required	itial Repor	Filed		Public R Require		Filed	
		Advisory Committee Members (FACA & non-FACA)	0		0		0		0	
		Experts/Consultants			0		0		0	
		Board Members Commissioners	0		0		0		0	
		Senior Mentors (SMs)	Not Applie	cable	Not Applica	ible	0		0	
		Other (except for SMs)	0		0		0		0	
				Security and F	Privacy Notice	Help   Access	ibility   De-	veloped by: CEO	OM LCMC	
-										

#### 2016 FDM DAEO-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

		views My Expired Rep Is Pilot Program! Pe		Pilot Program! OGE Age	the second se	ources		
				2016 FDM DAEO-2	20 Workshee	et		
1	DAFO EC 1	To DAEO, DLA_1436	hange +					C
8			1					C
nst or F	tructions Filers you s	for the DAEO: 1) This support, and Filers in the	worksheet shows Org Units/Suborg	information available in F linate Org Units where you	DM on disclosure r u are the DAEO. It	eports (i.e., OGE 2 should aid you in f	78, OGE 450), Illing out part o	ethics training record of the annual agency
ppo	ort to OGE.	<ol> <li>You will need to sup d separate instructions</li> </ol>	plement this work	sheet when preparing you	r part of the annua	I agency ethics rep	ort. Army will	be using an online
				Generate Wo	rksheet			
	ck here to	view detailed lists of file	ars counted as req	uired to receive and actua	lly received ethics	training in Part 3 E	ducation and T	raining questions.
								Export
		Worksheet covers t	he following Org	Units where DAEO, DL	A_1436 is Legal (	Office DAEO: 3		
		Note: Report only s	hows portions fo	r which FDM has answe	vrs.			
	t Questio	n Question Text and I ORGANIZATION/RE						
	1.			es (SGE) shown in FDM fr	or reports during 2	016 as of Decembe	r 31, 2016: <u>13</u>	L
		EDUCATION AND T	AINING (Click V	iew Ethics Training Deta	ails link in the Inst	ructions section ab	ove to view file	ers list.)
	1.	From the FDM Ethics	Training tab, numb	er of Filers shown who ac	tually received in	itial ethics oriental	tion: Z	
	2.	training:	190000000000000000000000000000000000000	er of Filers shown who we				ved annual ethics
			Requir Trainin	ed to Receive Annual Et g	hics Actually Training	Receive Annual I	thics	
		Public Filers (OGE 27 PAS	8) - non- 17		0			
		Confidential Filers (O 450)	GE Form 14		0			
	з.	Training methods use	d for your ethics tr	aining:				
		Distribution of wr						
		Video presentatio						
		Satellite broadcas		cing				
		Classroom instruc						
		Computer/web-b						
		12 S		and Materials): Self-st	udy manual			
	4.	Training materials use						
		☑Copies of the Star	idards of Conduc	t and or agency supple	montal monitation	83-01 F		
					mental regulation	15		
		Summaries of the	Standards of Co		mentar regulation	15		
		Pamphlets/Broch	Standards of Co		mentar regulatio	ns		
		Pamphlets/Broch	Standards of Co		mentar regulation	ns		
		Pamphlets/Broch Newsletters Posters	Standards of Co		mental regulation	ns		
		Pamphlets/Broch	Standards of Co		menta regulato	ns		
		Pamphlets/Broch Newsletters Posters Case studies	Standards of Co ures		inentai regulato	ns		
		Pamphlets/Broch Newsletters Posters Case studies Videos Message from Age	Standards of Co ures ency Leadership				faterials)	
5.		Pamphlets/Broch Newsletters Posters Case studies Videos Message from Ag Ø Other (See "Other PUBLIC FINANCIAL	Standards of Co ures ency Leadership r" in Training Me DISCLOSURE	nduct thods above for the cor	nplete list of Oth	er Methods and I		
i.	а.	Pamphlets/Broch Newsletters Posters Case studies Videos Message from Ag Ø Other (See "Other PUBLIC FINANCIAL	Standards of Co ures ency Leadership r" in Training Me DISCLOSURE number of public	nduct	nplete list of Oth	er Methods and I		SGEs, and the
5.	1,	Pamphlets/Broch Newsletters Posters Case studies Videos Message from Age Vibler (See "Other PUBLIC FINANCIAL By Filer category, the number of reports act	Standards of Co ures ency Leadership r" in Training Me DISCLOSURE number of public	nduct thods above for the cor	nplete list of Oth	er Methods and I	16, excluding	SGEs, and the
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5.	1.	Pamphlets/Broch Newsletters Posters Case studies Videos Message from Ag Øther (See "Other PUBLIC FINANCIAL By Filer category, the number of reports act	Standards of Co ures ency Leadership e" in Training He DISCLOSURE number of Jubilit in Standard Filed intrant Standard Filed	nduct thods above for the cor financial disclosure reports Incumbent	nplete list of Oth 5 (OGE 278) requir Termination	er Methods and I ed to be filed in 20 Incum	16, excluding ent and ation	SGEs, and the
	1,	Pamphlets/Broch Newsletters Posters Case studies Videos Wessage from Ag Other (See "Other PUBLIC FINANCIAL By Filer category, the number of reports act PAS Non-Career SES Career SES	Standards of Co ures ency Leadership e" in Training Me DISCLOSURE number of public July filed. Sominear Hew intrant Required Filed 0 0 0	nduct thods above for the cor financial disclosure reports Required Filed 1 0 2 3 0 1	Termination           Required         Fi           0         0           1         0	er Methods and I ed to be filed in 20 Incum Iced Require 0 0 0	16, excluding eent and ation ed Filed 0 0 0	SGEs, and the
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# 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, can22 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:

CWS, 278 1073 R

CWS, 278\_1073 R

Draft, 278 1037 R

Draft, 278 1037 R

#### 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. XI ... ReviewProgressSummary-Export.xlsx [Read-Only] - Excel Ť FILE HOME INSERT PAGE LAYOUT FORMULAS REVIEW VIEW ACROBAT DATA × ✓ fx 278 AgencyAgencyExt, DLA\_1471 X A2 1. Select the dropdown arrow to display auto B C F filter options. Filer Email Address Org Unit 278 AgencyAgencyExt, DLA\_1471 X t\_kennedy\_1 🛃 Sort A to Z 2017 New Entrant OGE 278 Draft t\_kennedy\_1 Z↓ Sort Z to A 2017 278 AgencyCbtExtsNoDate, DLA\_1470 X Incumbent/Termination OGE 278 Not Started 278 AgencyCZExtNoDate, DLA\_1472 X t\_kennedy\_1 Termination OGE 278 2017 Not Started Sor<u>t</u> by Color 278 AgencyExt 30, DLA\_1469 X t\_kennedy\_9 2017 Incumbent OGE 278 Not Started 🕵 🖸 Clear Filter From "Org Unit" 278 CombatExt 180, DLA 1476 X t\_kennedy\_1 2017 Termination OGE 278 Not Started 278 CombatExt 30 ind SLC, DLA\_1473 X t\_kennedy\_1 Submitted to DAEO E 278 2. Deselect (Select All) and 278 CombatExt 60, DLA\_1475 X t\_kennedy\_1 278 Not Started Text Filters only select the options you Amendment in Progress, 278 1055 R training\_278 wish to view and then click 78 Under Review Amendment in Search Amendment in Progress, 278 1055 R training\_278 OK ination OGE 278 Under Review Amendment in (Select All) Amendment in Progress, 278 1055 R training\_278 / Entran **OGE 278** Under Review Amendment in DLA 1 DLA 1-1-1 SOR 2017 Amendment in Progress, 278 1055 R training\_278 Termination OGE 278 Under Review Amendment in board members, 278\_1554 R fdmsandbox DLA 2 2017 Termination OGE 278 Draft BothSigs, 278\_1065 R training\_278 2017 Incumbent OGE 278 Undo Submitted to DAEO ---- DLA SOR Test BothSigs, 278 1065 R training 278 2017 Undo Submitted to DAEO New Entrant OGE 278 2017 Complete, 278\_1071 R training\_278 Incumbent OGE 278 Complete Complete, 278\_1071 R training\_278 2017 New Entrant OGE 278 Complete Complete, 278 1071 R training 278 2017 Termination OGE 278 Complete Complete, 278\_1071 R training\_278 2017 Incumbent/Termination OGE 278 Complete CWS, 278\_1073 R training\_278 OK Cancel 2017 Incumbent OGE 278 Completed Without Signature 2017 CWS, 278\_1073 R training\_278 New Entrant OGE 278 Completed Without Signature:

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

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training\_278\_19@us.army.mil

training\_278\_1@us.army.mil

training 278 1@us.armv.mil

**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.

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4 278 AgencyCZExtNoDate, DLA_1472 X	t_kennedy_12@us.army.mil	DLA 2	2017 Termination OGE 278		Not Started
5 278 AgencyExt 30, DLA_1469 X	t_kennedy_9@us.army.mil	DLA 2	2017	Incumbent OGE 278	Not Started
6 278 CombatExt 180, DLA_1476 X	t_kennedy_16@us.army.mil	DLA 2	2017	Termination OGE 278	Not Started
7 278 CombatExt 30 ind SLC, DLA_1473 X	t_kennedy_13@us.army.mil	DLA 2	2017	Incumbent OGE 278	Submitted to DAEO
8 278 CombatExt 60, DLA_1475 X	t_kennedy_15@us.army.mil	DLA 2	2017	New Entrant OGE 278	Not Started
13 board members, 278_1554 R	fdmsandbox@test.com	DLA 1	2017	Termination OGE 278	Draft
33 military, 278_20	john.r.fredericks.ctr@mail.mil	DLA 1	2017	New Entrant OGE 278	Submitted to DAEO
51					
52					
3					

**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.

A2 • : $f_x$ 278 AgencyAgencyExt, DLA_1471 X B C D E F							1. Select the dropdown arrow to display auto	
A Filer Name	<ul> <li>Filer Email Address</li> </ul>	✓ Org Unit		Reporting Status	▼ Review Status	filter options.		
278 AgencyAgencyExt, DLA 1471 X	t kennedy 11@us.army.mil	DLA 2	2017	New Entrant OGE 278	A Sort A to Z	Y N	-	
278 AgencyAgencyExt, DLA_1471 X 278 AgencyCbtExtsNoDate, DLA 1470 X	t kennedy 10@us.army.mil	DLA 2	2017	Incumbent/Termination OGE 278		T IN		
278 AgencyCDEXISNODATE, DEA_1470 X 278 AgencyCZExtNoDate, DLA 1472 X	t kennedy 12@us.army.mil	DLA 2	2017	Termination OGE 278	Z↓ Sort Z to A	2. Select Sort A to Z of	r Sr	
278 AgencyC2ExtNoDate, DEA_1472 X 278 AgencyExt 30, DLA 1469 X	t kennedy 9@us.army.mil	DLA 2	2017	Incumbent OGE 278	Sort by Color	to A and then click OK		
278 CombatExt 180, DLA 1476 X	t kennedy 16@us.army.mil	DLA 2	2017	Termination OGE 278	Clear Filter From "Review Status"	T T		
278 CombatExt 180, DLA_1478 X 278 CombatExt 30 ind SLC, DLA 1473 X	t kennedy 13@us.army.mil	DLA 2	2017	Incumbent OGE 278	Filter by Color	T N	_	
		DLA 2	2017			Y N Y N		
278 CombatExt 60, DLA_1475 X	t_kennedy_15@us.army.mil		2017	New Entrant OGE 278	Text Eilters >	Y N N N		
Amendment in Progress, 278 1055 R	training_278_10@us.army.mil	DLA SOR Test DLA SOR Test		Incumbent OGE 278	Search 🔎	N N		
Amendment in Progress, 278 1055 R	training_278_10@us.army.mil		2017	Incumbent/Termination OGE 278	····· (Select All)			
Amendment in Progress, 278 1055 R	training_278_10@us.army.mil	DLA SOR Test	2017	New Entrant OGE 278	Complete	N N		
Amendment in Progress, 278 1055 R	training_278_10@us.army.mil	DLA SOR Test	2017	Termination OGE 278	Completed Without Signatures	N N		
Amendment in Progress, 278 1077 C	training_278_21@us.army.mil	DLA SOC Only	2017	Incumbent OGE 278	□ Draft □ Not Started	N N		
4 Amendment in Progress, 278 1077 C	training_278_21@us.army.mil	DLA SOC Only	2017	Incumbent/Termination OGE 278	Submitted to DAEO	N N		
Amendment in Progress, 278 1077 C	training_278_21@us.army.mil	DLA SOC Only	2017	New Entrant OGE 278	Under Review Amendment in Prog	N N		
6 Amendment in Progress, 278 1077 C	training_278_21@us.army.mil	DLA SOC Only	2017	Termination OGE 278	Under Review Filer Signed	N N		
7 board members, 278_1554 R	fdmsandbox@test.com	DLA 1	2017	Termination OGE 278	Under Review SLC Signed	N N		
8 BothSigs, 278_1065 R	training_278_15@us.army.mil	DLA SOR Test	2017	Incumbent OGE 278	< >>	N N		
9 BothSigs, 278_1065 R	training_278_15@us.army.mil	DLA SOR Test	2017	New Entrant OGE 278		N N		
0 Complete without Signature, 278_1039 C	training_278_2@us.army.mil	DLA SOC Only	2017	Incumbent OGE 278	OK Cancel	Y N		
1 Complete without Signature, 278_1039 C	training_278_2@us.army.mil	DLA SOC Only	2017	New Entrant OGE 278		Y N		
2 Complete without Signature, 278_1039 C	training_278_2@us.army.mil	DLA SOC Only	2017	Termination OGE 278	Completed Without Signatures	Y N		
Complete without Signature, 278_1039 C	training_278_2@us.army.mil	DLA SOC Only	2017	Incumbent/Termination OGE 278	Completed Without Signatures	Y N		
4 Complete, 278 1043 C	training_278_4@us.army.mil	DLA SOC Only	2017	Incumbent OGE 278	Complete	Y N		
5 Complete, 278 1043 C	training_278_4@us.army.mil	DLA SOC Only	2017	New Entrant OGE 278	Complete	Y N		
6 Complete, 278 1043 C	training_278_4@us.army.mil	DLA SOC Only	2017	Termination OGE 278	Complete	Y N		
7 Complete, 278 1043 C	training_278_4@us.army.mil	DLA SOC Only	2017	Incumbent/Termination OGE 278	Complete	Y N		
8 Complete, 278_1071 R	training_278_18@us.army.mil	DLA SOR Test	2017	Incumbent OGE 278	Complete	Y Y		
9 Complete, 278_1071 R	training_278_18@us.army.mil	DLA SOR Test	2017	New Entrant OGE 278	Complete	Y Y		
0 Complete, 278_1071 R	training_278_18@us.army.mil	DLA SOR Test	2017	Termination OGE 278	Complete	Y Y		
1 Complete, 278_1071 R	training_278_18@us.army.mil	DLA SOR Test	2017	Incumbent/Termination OGE 278	Complete	Y Y		
2 CWS, 278_1073 R	training_278_19@us.army.mil	DLA SOR Test	2017	Incumbent OGE 278	Completed Without Signatures	Y N		
3 CWS, 278_1073 R	training_278_19@us.army.mil	DLA SOR Test	2017	New Entrant OGE 278	Completed Without Signatures	Y N		
CWS, 278 1073 R	training 278 19@us.army.mil	DLA SOR Test	2017	Termination OGE 278	Completed Without Signatures	Y N		
CWS, 278 1073 R	training_278_19@us.army.mil	DLA SOR Test	2017	Incumbent/Termination OGE 278	Completed Without Signatures	Y N		
Dinsmore, Eve	eve.dinsmore@us.army.mil	DLA 1-1-1	2017	Incumbent/Termination OGE 278	Draft	N N		
7 Dinsmore, Eve	eve.dinsmore@us.army.mil	DLA 1-1-1	2017	New Entrant OGE 278	Not Started	Y N		

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.