

# Compliance Report Instructions for Financial Disclosure Reports (FDR)

1. **Internal Liaisons:** <http://cosaweb/fdradmin> or Open COSAweb – Intranet Portal

In the address bar after <http://cosaweb/> type in: `fdradmin`



2. **External Users:** <https://webapps.sanantonio.gov/fdr/>

Select option: Assigned Logon id. (non-city employees)

Enter Logon ID and Password

Select Logon button

Login



\*\* If you have not received your Logon ID or Password, please contact the Office of the City Clerk at 210-207-7253.

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## 3. Select Reports on side menu



## 4. Select report: Users Not in Compliance

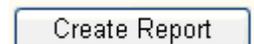


## 5. Following screen will appear:

- Click on down arrow and select correct Start and End dates from list (see next screen)  
\*you do not need to change the Start date, but you will need to change the End date.
- Filter By: Select Department



Select date from list and then select the Create Report button



I recommend you select the last date in the selection, in order to capture all individuals who have not completed a FDR.

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## 6. Non Compliance Report

The Board Members who have not completed their FDR through March 31, 2011 are listed. You will need to contact the Board Member to ensure they will complete their FDR by the due date.

Note: the list changes as Board Members are appointed by City Council on Thursdays. Make sure you pull a Non Compliance Report at least once a week. The Board Members name is removed from the Non compliance Report once their FDR is submitted.

## 7. Here you may select View Report, Export Report, or send email

Name	Logon Id	Due Date	Board, Commission, or Department	Email
BARROS MARCO A.		03/31/2011	Airport Advisory Commission	Email
BENSON EDWARD A.		03/31/2011	Airport Advisory Commission	Email
EGLIT VERNER		03/31/2011	Airport Advisory Commission	Email
GISH KYLE A.		03/31/2011	Airport Advisory Commission	Email
HENDLER MARSHA B.		03/31/2011	Airport Advisory Commission	Email
Hobgood Leslie A		03/31/2011	Airport Advisory Commission	Email
Jackson Earl		02/22/2011	Airport Advisory Commission	Email
Loomis Barbara L.		03/31/2011	Airport Advisory Commission	Email
QUINN JAMES D. Jr.		03/31/2011	Convention and Visitors Commission, Airport Advisory Commission	Email
RICHER PRISCILLA R.		03/31/2011	Airport Advisory Commission	Email
STONE NEIL H.		03/31/2011	Airport Advisory Commission	Email
TAFOLLA MARK		03/31/2011	Airport Advisory Commission	Email
Tate Kyle M		03/31/2011	Airport Advisory Commission	Email
Wolfe Michael K.		03/31/2011	Airport Advisory Commission	Email
WOOD LOREN G.		03/31/2011	Airport Advisory Commission	Email

## 8. Select Export Report, then Download to Excel

Name	Logon Id	Due Date	Board, Commission, or Department	Email
BARROS MARCO A.		03/31/2011	Airport Advisory Commission	Email
BENSON EDWARD A.		03/31/2011	Airport Advisory Commission	Email
EGLIT VERNER		03/31/2011	Airport Advisory Commission	Email
GISH KYLE A.		03/31/2011	Airport Advisory Commission	Email
HENDLER MARSHA B.		03/31/2011	Airport Advisory Commission	Email
Hobgood Leslie A		03/31/2011	Airport Advisory Commission	Email
Jackson Earl		02/22/2011	Airport Advisory Commission	Email
Loomis Barbara L.		03/31/2011	Airport Advisory Commission	Email
QUINN JAMES D. Jr.		03/31/2011	Convention and Visitors Commission, Airport Advisory Commission	Email
RICHER PRISCILLA R.		03/31/2011	Airport Advisory Commission	Email
STONE NEIL H.		03/31/2011	Airport Advisory Commission	Email
TAFOLLA MARK		03/31/2011	Airport Advisory Commission	Email
Tate Kyle M		03/31/2011	Airport Advisory Commission	Email
Wolfe Michael K.		03/31/2011	Airport Advisory Commission	Email
WOOD LOREN G.		03/31/2011	Airport Advisory Commission	Email

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## 9. This is the report in Excel

	A	B	C	D	E
	Name	Logon id	Due Date	Board, Commission, or Department	Email
1					
2	BARROS MARCO A.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
3	BENSON EDWARD A.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
4	EGLIT VERNER	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
5	GISH KYLE A.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
6	HENDLER MARSHA B.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
7	Hobgood Leslie A	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
8	Jackson Earl	REDACTED	2/22/2011	Airport Advisory Commission	<a href="#">Email</a>
9	Loomis Barbara L.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
10	QUINN JAMES D. Jr.	REDACTED	3/31/2011	Convention and Visitors Commission,	
11	RICHER PRISCILLA R.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
12	STONE NEIL H.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
13	TAFOLLA MARK	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
14	Tate Kyle M	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
15	Wolfe Michael K.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
16	WOOD LOREN G.	REDACTED	3/31/2011	Airport Advisory Commission	<a href="#">Email</a>
17					

## 10. If you select Send Email you will get an option for Boards and Commissions and a drop down list with options for emails.

Report Type   Report Filters   View Report   Export Report   **Send Email**

No Email Type Selected

Email Recipients:  Boards and Commissions  
 Board Liaisons

Email Type:    **Create Email**

From: FDR Liaison  
 To: funny.name@gmail.com

BCC: **REDACTED**

Subject:

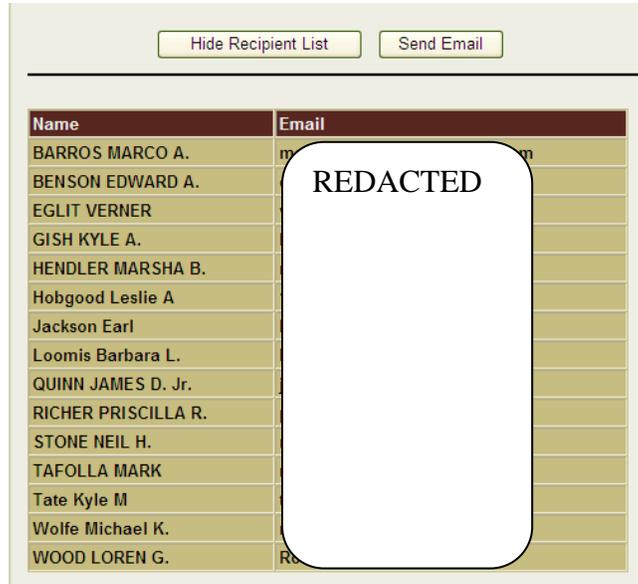
Body:

Be sure the email type is blank and select Create Email. You can put a message in the body and send it to all of the members listed in the report. At the bottom of the page you may chose

[Preview Recipients](#)   [Send Email](#)

# Compliance Report Instructions for Financial Disclosure Reports (FDR)

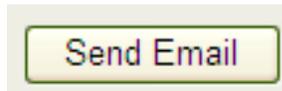
11. This is a good way to see exactly who you are sending an email to.



The screenshot shows a web interface for sending emails. At the top, there are two buttons: 'Hide Recipient List' and 'Send Email'. Below these is a table with two columns: 'Name' and 'Email'. The 'Name' column lists several individuals, and the 'Email' column contains redacted information. A large white box with the word 'REDACTED' is overlaid on the right side of the table.

Name	Email
BARROS MARCO A.	m
BENSON EDWARD A.	
EGLIT VERNER	
GISH KYLE A.	
HENDLER MARSHA B.	
Hobgood Leslie A	
Jackson Earl	
Loomis Barbara L.	
QUINN JAMES D. Jr.	
RICHER PRISCILLA R.	
STONE NEIL H.	
TAFOLLA MARK	
Tate Kyle M	
Wolfe Michael K.	
WOOD LOREN G.	Ro

12. When you are ready select



13. Please note: There are known issues with Firefox. Please use Explorer or Safari to complete/view FDR reports."