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Creating a NIEM-XML Version of Annual FOIA Report Using the Excel Template

In order to download and use the Excel template, please perform the following steps:

1. Go to <http://tools.niem.gov/niemtools/iepd/display/container.iepd?ref=WQ1wZ-5CFBM>.
2. Click on the "Download" link located in the upper right portion of the screen, immediately below the box which states "IEPD Details."
3. A box will pop up asking whether you wish to open or save the file. Click "Save," and save the file to a location where you will be easily able to locate it.
4. Go to the location where you saved the file, and open it.
5. You will need to extract the contents of the file. If you are using WinZip, click once on the main folder, "[FOIA_Annual_Report_v.1.03.zip]," and click on the "Extract" button located on the bar at the top of the screen. Alternatively, you may right-click on "[FOIA_Annual_Report_v.1.03.zip]," and click on "Extract."
6. A box will pop up asking where you wish to extract the contents of the file to. Find a location that will be easy for you to remember, and click on the "Extract" button.
7. Go to the location where you extracted the file contents to. There should now be a folder titled "FoiaAnnualReport." Open that folder.
8. To use the Excel spreadsheet to create your Annual Report, open the "tools" folder.
9. Open the Excel template, "FoiaAnnualReport-v1.1."
10. You will need to enable Macros in order to use the template. Instructions appear on the template itself. If using Excel 2007, you should also see a bar near the top of the screen (above the cells, but below the toolbar), which states "**Security Warning** Macros have been disabled." Next to this is an "Options..." button. Click on the "Options..." button.
11. Click on the circle next to "Enable this content" and click "OK."
12. A box will pop up notifying you that it cannot locate "FOIARibbonOverride-v2.xlam." Click "OK."

13. A box will pop up allowing you to open another document. Go to the location where you extracted the contents of the file, the same location where you opened up the Excel Template from. Go into the "FoiaAnnualReport" folder.
14. Open the "tools" folder.
15. Open the file titled, "FoiaRibbonOverride-v2."
16. You should now be able to enter data into the spreadsheet. Before entering data, please review the information on the "Instructions" tab.
17. Note that you may save the worksheet as you are working on it, which OIP recommends doing throughout the process to avoid the loss of data.
18. Carefully follow the instructions located on each tab of the spreadsheet, and enter your agency's data.
19. After you have entered your agency's data, you will need to export the file to the appropriate format: NIEM XML. To do this, locate the "Add-Ins" tab at the top of the screen (located on the same line as (Home, Insert, Page Layout, etc.), and click on it.
20. Click "Export as NIEM XML."
21. A box will pop up allowing you to save the file. Go to the "FoiaAnnualReport" folder, then to "exchange_files", then to "sample." Save the file in the "sample" folder.
22. Your agency's XML Document should now be located in the "sample" folder. It is this XML Document, in addition to your agency's human-readable Annual FOIA Report, that you must provide to OIP.

NOTE: If you are unable to export your completed Excel template to an XML document, please review any error message(s), and check whether your template includes any red cells. A red cell indicates that the entered data has failed a system validation check. If the red cell is the result of a math or data entry error, the agency should (1) correct the data in the template and (2) correct the data in the human-readable report. If instead the figure in the red cell is not due to a math or data entry error and can be explained with a footnote, the agency should (1) annotate the data with a footnote, (2) save the Excel template, and (3) send that template to OIP for review. Please note that if your agency has no components, enter no information in the "Component Definition" section on the "Agency Information" tab. If you wish to copy and paste data in the Excel template, you must do so only in the way directed on the "Instructions" tab of the Excel template. **Please read the directions on the Excel template before seeking OIP's assistance.**