



Financial Disclosure Management Release 8.2.0.17

October 22, 2018

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Introduction

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

8.2.0.17 Enhancements

Defects and Changes

Admin Center

New Admin Center Features

New Features

- Org Tree Navigation
- Ability to manage Filers within an Org Unit
- Accessible Org Unit audit history
- 450 Certifiers and their ECs can now manage 450 Filer Assistants
- Move Filer now lists eligible and ineligible reports. (Complete reports are ineligible)
- Improved User Profile Disclosure Reports List Table

Org Management

Org Tree Navigation

The Org Tree replaces the Org Unit Breadcrumb trail for navigating through the Org Units you manage in FDM.

Working with Org Units


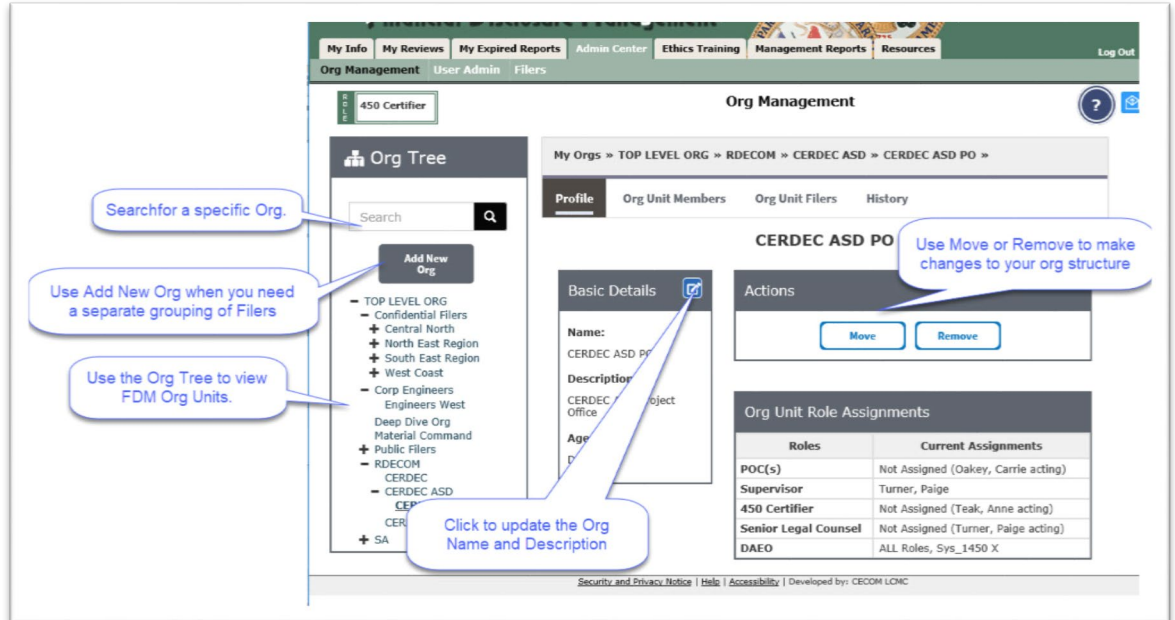
1. Go to **Admin Center | Org Management**.
2. Navigate the **Org Tree** on the left to locate and select where you want to add the new Org Unit.
3. On the Org Unit Profile page you can:
 - Click **Add New Org**, located above the Org Tree panel and then enter a name and description for your new Org Unit. The Org Unit will be added below the selected Org Unit.
 - Click **Move** to move a selected org to align filers and review chain participants.
 - Click **Remove** to delete an org unit in FDM.
 - Click the **Edit Icon**  to edit/change an org unit name and description.

Figure 1. Org Unit Profile



Important Information

- Additional Org Units are only necessary when you need different or separate groupings of Filers and Review Chain participants. You may also have new Filers and/or reviewers who need to be grouped together.
- The Org Unit name must be unique: duplicate names are not permitted at the same level within the Org Unit.

- Each Org Unit inherits the review chain participants from the Agency Org Unit until a different review chain is assigned to the subordinate Org Unit.
- Move an Org Unit to a different location in the Org Tree to align the Filers and review chain participants appropriately after a transformation.
- When removing an Org Unit, any associated Filers must be moved to another Org Unit or have their Filer role removed if they are no longer Filers in FDM.

Managing Org Unit Members

1. Go to **Admin Center | Org Management**.
2. Select an Org Unit from the **Org Tree** and then click on the **Org Unit Members** header. A listing of the Org Unit Members is displayed.
3. From the Org Unit Member page, you can:
 - **Assign** specific individuals to Org Unit roles. Assigning replaces someone as an Org Unit Member.
 - **Add** specific individual to Org Unit roles. You can add multiple POCs to any Org Unit in order to help manage your Filers.
 - **Remove** assigned Org members from the Org Unit.
 - **Replace** an assigned Org member.

Figure 2. Org Unit Members

Org Unit Members tab displays a list of the Org Unit Review Chain and POCs.

Search through your agency directory to add or replace an Org Unit Member.

Click Add, Replace or Remove to update the Org Unit Members

Important Information

- If the selected person holds that role in the selected organization, the **Add Role Warning** displays. Try your search again for a different user.
- Only those roles that you have permission to change will display a **Replace** icon.
- In the search area on the right of your screen, select the appropriate Agency Directory, type the new user's email address, and then click **Search**.

Managing Org Unit Filers

1. Go to **Admin Center | Org Management**.
2. Select an Org Unit from the **Org Tree** and then click on the **Org Unit Filers** header.
3. Select the **Filer Panel** you are authorized to manage.
4. From the Org Unit Filer page, you can:
 - **Add** a Filer to the selected Org Unit
 - **Add Multi Filers**, up to 100, at the same time to an Org Unit.
 - **View** specific Filer's profile.
 - **Move** a Filer to a different Org Unit.
 - **Remove a Filer's Role** from FDM.
 - **Assign** a specific Filer a disclosure report.
 - **Add Assistant** to a specific Filer.

Figure 3. Org Unit Filers

The screenshot shows the 'Org Unit Filers' page for the 'CERDEC ASD PO' Org Unit. The interface includes an 'Org Tree' on the left, a 'Profile' tab, and a table of filers. Callouts provide the following information:

- Org Unit Filers tab displays a list of the Filers associated with the selected org unit.**
- Click Add Filer to add Filers one at a time to an org unit. Click Add Multi to add up to 100 Filers at a time to an Org Unit.**
- Click a Filer Panel to view a listing of Filers for the selected Org Unit.**
- Click the appropriate icon to:**
 - View a Filer's Profile
 - Move a Filer
 - Remove a Filer's Role
 - Assign a report to a Filer
 - If authorized, add a Filer assistant to a Filer

E-mail	Last Name	First Name	M I	Org Unit Name	Org Unit Description	Supervisor	View	Move	Assign	Remove 450 Filer	Add Assistant
b_ross_19@us.army.mil	King	Leigh		CERDEC ASD PO	CERDEC ASD Project Office	Turner, Paige					
b_ross_21@us.army.mil	Kuehl	Molly		CERDEC ASD PO	CERDEC ASD Project Office	Turner, Paige					
b_ross_18@us.army.mil	Walker	Jay		CERDEC ASD PO	CERDEC ASD Project Office	Turner, Paige					

Important Information

- Click the table headers to sort your list of Filers.
- If you are trying to add a Filer who is already a Filer in another Org Unit in FDM, you will see the Move Filer page.
- You can only move a Filer to an Org Unit within your Org Tree View.
- If you are a 450 Certifier or a 450 Certifier EC, you can add 450 Filer Assistants.
- If you are a DAEO or DAEO EC, you can add 278 Filer Assistant.
- Removing a Filer only removes his/her Filer role in FDM and does not permanently remove the user from FDM.

Adding Multiple OGE 450 Filers

In FDM, you can now add 100 filers at the same time.

1. Go to **Admin Center | User Admin**.
2. Select an Org Unit from the **Org Tree** and then click on the **Org Unit Filers** header.
3. Select the **OGE 450 Filer** panel.

Figure 4. Figure Add Multiple 450 filers

Org Management

My Orgs » TOP LEVEL ORG » Confidential Filers » North East Region »

Profile Org Unit Members Org Unit Filers History

North East Region
Supervisor: Sea, Stormy X 450 Certifier: Raine, Misty X

Add Multiple 450 Filers

Agency Directory: DoD

Copy/Paste Email Addresses
Instructions: Type or copy and paste e-mail addresses in the box below. Each address requires a separate line. Enter a maximum of 100 e-mail addresses.
Copy and paste e-mail address here.

Upload OGE 450 Filer List
Instructions: Import a list of Filers using the FDM Filer Import Template.
Click to download and use the FDM Filer Import Template.
Import

Type and/or copy and paste multiple filer email addresses.

Bulk add up to 100 new filers at one time.

Ability to upload 450 filers via FDM excel spreadsheet..

Figure 5. Add Multiple 450 filers – Search Results

Org Management

My Orgs » TOP LEVEL ORG » Confidential Filers » North East Region » North East 2 »

Profile Org Unit Members Org Unit Filers History

North East 2
Supervisor: Storm, Gail X 450 Certifier: Storm, Gail X

Add Multiple 450 Filers

Agency Directory: DoD

Review and Confirm
Instructions: Uncheck any individual you do not wish to add. Only selected individuals will be added to FDM.

Show 100 entries

Add	In FDM?	E-mail	Last Name	First Name	Middle Name	Phone	FDM Roles	Reason
<input type="checkbox"/>	No	Augusta.B.Smith2.cv@mail.mil	Smith	Augusta				
<input checked="" type="checkbox"/>	Yes	katrel.e.bishop_ctr@mail.mil	Bishop	Katrel	E	443-861-8247	DAEO, 450 Certifier, Awar Ethics officers, FDM User	Has incomplete reports
<input type="checkbox"/>	No	chris.collins@mail						Invalid Email Address
<input checked="" type="checkbox"/>	Yes	stormy.dry.cv@mail.mil					450 Filer	Already a Filer in FDM
<input type="checkbox"/>	No	janine.d.bland_ctr@mail.mil						Not found in directory
<input type="checkbox"/>	No	Troy.a.kelley_5_ctr@mail.mil						Duplicate Email Address

Confirm Cancel

Filer Profile – Reports list

In FDM, you can now view a complete list of reports associated to a specific Filer.

1. Go to **Admin Center | User Admin**.
2. Select an Org Unit from the **Org Tree** and then click on the **Org Unit Filers** header.
3. Select the **OGE 450 Filer panel**.
4. Click the **View** icon beside a specific filer

Figure 6. Filer Profile – Reports list

View a filer's profile to see a list of associated disclosure reports, their review status and current due date.

Report Year	Report Status	Review Status	Assigned	Current Due Date	Assigning Org Unit	
2015	OGE 450 Annual	Not Started	Yes	02/17/2015	Confidential Filers	
2016	OGE 450 New Entrant	Under Review - Amendment in Progress	Yes	10/10/2016	Confidential Filers	
2016	OGE 450 Annual	Draft	Yes	02/16/2016	Confidential Filers	
2018	OGE 450 New Entrant	Not Started	Yes	09/05/2018	Confidential Filers	

Filer Profile – Add Filer Assistants

In FDM, 450 Certifiers and their ECs can now add OGE 450 Filer Assistants.

1. Go to **Admin Center | User Admin**.
2. Select an Org Unit from the **Org Tree** and then click on the **Org Unit Filers** header.
3. Select the **OGE 450 Filer panel**.
4. Click the **Add Assistant** icon beside a specific filer.

Figure 7. Filer Profile – Assistant/ECs list

The screenshot displays the 'Profile - Windy Dey' interface. At the top, there are navigation tabs: My Info, My Reviews, My Expired Reports, Admin Center, Ethics Training, Management Reports, Resources, and Log Out. Below the navigation, there are sub-tabs: Org Management, User Admin, and Filers. A '450 Certifier' badge is visible in the top left. The main content area shows the user's profile, contact information, and a list of filer assistants. A callout box points to the 'Add Filer Assistant' button, stating: '450 Certifiers and their ECs can add a 450 Filer assistant'. Another callout box points to the profile information, stating: 'View a filer's profile to see: - Other roles the filer may have in FDM - A list of the filer's assistants and ECs - A list of the filer's reports - A list of activities, in chronological order for the Filer.'

Profile - Windy Dey

Dey, Windy Contact Info

Last Name	Dey
First Name	Windy
Middle Initial	
E-Mail	W.Dey@FDMSandbox.com
Phone	000-000-0000

Roles Assistants/ECs Reports History

Dey, Windy Filer Assistants ➕ Add Filer Assistant

Email	Last Name	First Name	Middle Initial	Phone	Role
A.Wynd@FDMSandbox.com	Wynd	Augusta	X	000-000-0000	450 Filer Assistant

Assistants or ECs to Dey, Windy

Role	Asst or EC User Name
No data available in table	

Dey, Windy is an Assistant or EC to ...

Role	Org Name	Who User Assists
No data available in table		

Org Unit History

1. Go to **Admin Center | Org Management**.
2. Select an Org Unit from the **Org Tree** and then click on the **History** header.
3. Review the list of activities, listed in chronological order, which have affected the Org Unit.

Figure 8. Org Unit History

The screenshot displays the 'Org Unit History' interface. At the top, there is a navigation bar with tabs: 'My Info', 'My Reviews', 'My Expired Reports', 'Admin Center', 'Ethics Training', 'Management Reports', and 'Resources'. Below this, the 'Org Management' section is active, showing 'User Admin' and 'Files' options. A '450 Certifier' badge is visible in the top left. The main content area shows the 'Org Tree' on the left with a search bar and an 'Add New Org' button. The tree includes 'TOP LEVEL ORG', 'Confidential Filers', 'Corp Engineers', 'Deep Dive Org', 'Material Command', 'Public Filers', 'RDECOM', 'CERDEC', 'CERDEC ASD', and 'CERDEC PO'. The 'History' tab is selected for 'CERDEC PO'. A callout bubble points to the 'History' tab with the text: 'Org Unit History tab displays a list of the activities, in chronological order, for the Org Unit'. Below the breadcrumb 'My Orgs >> TOP LEVEL ORG >> RDECOM >> CERDEC PO >>', there are tabs for 'Profile', 'Org Unit Members', 'Org Unit Filers', and 'History'. The 'History' tab shows the 'Audit Trail History of CERDEC PO' with a 'Show 100 entries' dropdown. The table below lists two entries:

Date	Action Performed By	Role	History	Details
Tue Aug 21 10:06:36 CDT 2018	ALL Roles, Sys_1450 X	POC	Added BHAVIN G MODHA as POC to Org Unit CERDEC PO	
Tue Aug 21 10:06:14 CDT 2018	ALL Roles, Sys_1450 X	DAEO	Added Sys_1450 X ALL Roles as POC to Org Unit CERDEC PO	

Showing 1 to 2 of 2 entries

User Admin

User Admin allows you to see a full listing of the users, by role that you are responsible for within your Org Tree View. You can also search for a specific user in FDM.

Viewing User Lists by Role

1. Go to **Admin Center | User Admin**.
2. Select an Org Unit from the **Org Tree** and then click on a **Role Panel** to view a list of all of the users with that role.
3. Select the **Filer Panel** you are authorized to manage.
4. From the User Admin page, you can:
 - **Search** for a specific user in FDM
 - **View** a user's profile.
 - **Change** a user's role assignment.

Figure 9. User Admin

The screenshot displays the 'User Admin' interface. At the top, there is a navigation bar with tabs for 'My Info', 'My Reviews', 'My Expired Reports', 'Admin Center', 'Ethics Training', 'Management Reports', and 'Resources'. Below this, a breadcrumb trail shows '450 Certifier' and 'User Admin'. A search bar is present with the text 'Search - Find a specific user'. Below the search bar, there is a section for 'Browse and select an Org Unit' with an 'Org Tree' on the left. The 'Org Tree' shows a hierarchy starting with 'TOP LEVEL ORG' and 'Confidential Filers', leading to 'North East Region' and 'North East 5'. A 'Supervisors' panel is active, showing a list of users. A table lists supervisors with columns for E-mail, Last Name, First Name, M.I., Phone, Org Unit, and Org Unit Description. The table contains six entries. Callouts provide instructions: 'Use User Admin to search for a specific FDM User or to view a list of user by their FDM Role.' points to the search bar; 'Click the Search area to search for a specific user in FDM.' points to the search input; 'Click View to view a user profile. Click Change to assign a new user to the selected role.' points to the 'View' and 'Change' icons in the table; 'Click the Search area to search for a specific user in FDM.' points to the search input in the Org Tree; 'Points of Contact (POCs) 1' and 'Supervisors 6' are also indicated.

E-mail	Last Name	First Name	M.I.	Phone	Org Unit	Org Unit Description	View	Change
W.Dey@FDM Sandbox.com	Dey	Windy		000-000-0000	North East 5	North East 5	View	Change
S.Sea@us.army.mil	Sea	Stormy	X	000-000-0000	North East Region	North East Region	View	Change
G.Storm@FDM Sandbox.com	Storm	Gail	X	000-000-0000	North East 2	North East 2	View	Change
R.Storm@FDM Sandbox.com	Storm	Raine	X	000-000-0000	North East 4	North East 4	View	Change
Winds@FDM Sandbox.com	Winds	Gail	X	000-000-0000	North East 1	North East 1	View	Change
A.Wynd@FDM Sandbox.com	Wynd	Augusta	X	000-000-0000	North East 3	North East 3	View	Change

Filers

Filers allows you to see a full listing of the Filers you are responsible for within your Org Tree View.

Viewing a Filer List

1. Go to **Admin Center | Filers**.
2. Select the **Filers**.
3. From the Filers page, you can:
 - **Export** your Filer list
 - **View** specific Filer's Profile.
 - **Move** a Filer to a different Org Unit.
 - **Remove a Filer's Role** from FDM.
 - **Assign** a specific Filer a disclosure report.
 - **Add an Assistant** to a specific Filer.

Figure 10. Filers

Use Filers to view a list of all the Filers in your Org Tree View.

Search for a specific filer in your list.

Click Export to export an excel spreadsheet list of your filers.

Click a Filer Panel to view a listing of Filers for the selected Org Unit.

Click the appropriate icon to:
- View a Filer's Profile
- Move a Filer
- Remove a Filer's Role
- Assign a report to a Filer
- If authorized, add a Filer assistant to a Filer

E-mail	Last Name	First Name	M. I.	Org Unit Name	Org Unit Description	Supervisor	View	Remove 450 Filer	Add Assistant
training_450_15@us.army.mil	450_15	Training	X	Central North 1	Central North 1	RegressFiler, 450_1443			
training_450_16@us.army.mil	450_16	Training	X	Central North 1	Central North 1	RegressFiler, 450_1443			
training_450_17@us.army.mil	450_17	Training	X	Central North 1	Central North 1	RegressFiler, 450_1443			
ams@sandbox.com	Adams	Abby	X	AMC HQ	AMC HQ	Niccombs, Christopher			
ams@sandbox.com	Adams	Louisa	X	AMC HQ	AMC HQ	Niccombs, Christopher			
thomas.a.berans_ctr@mail.mil	Admin	System_1409	X	Sam's Known	Test Known Issues	FilerAsst, 450			
margaret.baines@us.army.mil	Baines	Ma							
C.Barr@FDMsandbox.com	Barr	Cl							
janine.s.blend_ctr@mail.mil	Bland	Janine				Christopher			

Defects and Changes

FDM-1107– FDM users assigned at the Agency Org Unit level can no longer be deleted. Users at an Agency Org Unit level must be replaced.

FDM 2280 – Updated links reference OGE 278e to point to OGE site Excel form.

FDM- 2260 – Updates have been made to the Instructions and Common questions on the OGE 450 CQs for Gift Reimbursements and travel expense.

FDM-2281 – The Adobe Reader Test link has been removed on the disclosure report View/Print page.

FDM-2441 – The following Disclosure Review States have been added:

- Under Review – Filer Signed
- Under Review – Amendment in Progress
- Under Review – Amended
- Under Review – Supervisor Signed
- Under Review – SLC Signed
- Undo Submit to DAEO

FDM-2460 – Updates have been made to the Instructions and Common questions on the OGE 278 Assets Yes/No and Add/Edit/View Asset page.

FDM-2531 – A footer has been added to all FDM notifications from FDMDoNotReply that includes first, middle initial, last name, email and phone of sender.

FDM 2555 & FDM 2570 – The Pilot! Standard reports tab has been renamed Legacy reports under the management reports tab. The Legacy Reports tab has been moved to after the OGE Agency Reports tab.