Managing FDM Roles

The Admin roles screens allow you to manage review chain participants and POCs within their related Org Units.

**FDM Role Authorizations**

The table below lists the permission levels for adding new FDM users by FDM Role.

<table>
<thead>
<tr>
<th>Admin Role</th>
<th>Authorizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Admin</td>
<td>Can add, move or delete an SLC, 450 Certifier, Supervisor, POC or Filer</td>
</tr>
<tr>
<td>DAEO</td>
<td>Can add, move or delete all roles including Agency Admins</td>
</tr>
<tr>
<td>SLC</td>
<td>Can add, move or delete a 450 Certifier, Supervisor, POC, or Filer</td>
</tr>
<tr>
<td>450 Certifier</td>
<td>Can add, move or delete a Supervisor, POC or Filer</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Can add, move or delete a Supervisor, POC or Filer</td>
</tr>
<tr>
<td>POC</td>
<td>Can add, move or delete a Supervisor, POC or Filer</td>
</tr>
</tbody>
</table>

**Adding a New FDM User**

At the beginning of each filing season, you may have a few new POCs, Supervisors, Senior Legal Counsels, 450 Certifiers, or DAEOs to add to FDM.

Note: Since the screens for adding new roles are the same, for the purpose of this document, Admin page will refer to the POC, Supervisors, Senior Legal Counsels, DAEO, 450 Certifier and System Admin sub tabs.

To add a new user to an FDM Org Unit:

1. From any point within FDM, click Admin and then select any FDM Role tab, POCs, Supervisors, 450 Certifiers, SLCs, or DAEOs.
2. Select the Org Unit you wish to assign this new user to from the Next Level Down drop-down list and the appropriate Scope.

**Verifying if the User Exists in FDM**

Prior to adding a new user, first verify if this user already exists within FDM.

3. In the breadcrumb trail click My Orgs and then select Show My Supervisors and Include Supervisors for Org Units assigned to other SLCs.
4. In the Search area, type the name of the new user and click Search. Review the list of matching results.
5. Click Add New (FDM Role) and New OrgUnit.
6. Type at least three letters of the Last, First and/or Middle name and click Search.

**Note:** The Search & Select New (FDM Role) search, searches within the selected agency’s the Global Directory. If searching by e-mail, enter the user’s DOD Common Access Card embedded e-mail address only.

7. Click Select beside the name of the person you want to add.
User Already has Selected Role with Another Org Unit Add [Role] Warning

At times, the person you are adding may already hold the same FDM role for another Org Unit. You will need to decide if the person you are adding should hold the same role for multiple Org Units in FDM.

8. Select the Yes to allow this person to hold the same role for multiple Org Units and then click Confirm.

Adding a New Org Unit

Anytime a new Supervisor, 450 Certifier, SLC or DAEO is added to FDM, a new Org Unit must be added at the same time. Only one DAEO, SLC, 450 Certifier or Supervisor can be associated to an Org Unit at a time. However, you can associate more than one POC to each Org Unit to delegate of tasks effectively. Once a new Supervisor, 450 Certifier, SLC or DAEO is added with a new Org Unit, you can then assign other Org Unit review chain participants to the vacancy for the Org Unit. See the Vacancies - Assigning a User to an Org Unit section of this card for more information.

Note: All new Org Units are added as subordinate Org Units to the currently selected Org Unit.

9. Type the appropriate Name and Description for your Org Unit.

Org Unit Name

- The Org Unit Name must be unique and is limited to 20 alphanumeric characters. The Org Unit name should accurately reflect the Org Unit of filers you supervise. The structure of your Org Units in FDM should mirror the hierarchy of your organization. FDM does not prohibit you from naming Org Units whatever you like, however it is recommended that you follow a standardized Org Unit naming convention. For example, the Army office symbols.

Org Unit Description

- Use the Description field to describe the Org Unit further so you can easily distinguish the Org Unit from others that may have a similar name. For example, you could type ASD as the Org Unit’s name and Application Support Division (SEC/ITED) as the Org Unit Description. The Org Unit Description is limited to 100 alphanumeric characters.

Move

You can Click Move to make the new Org Unit subordinate to a different Org Unit.

10. Click Save and then click OK.

11. Confirm that you wish to assign the person the selected role and that the Org Unit is not a duplicate and then click Confirm.
**Deleting a Role in FDM**

Deleting a POC or review chain participant simply removes their association to a selected Org Unit. Once deleted, the screen will show a “vacancy” for that Org Unit and the next level up role in the “acting” position.

1. Locate the Org Unit where the POC, Supervisor or Legal Reviewer should be removed and then click **Delete**.

2. Click **OK** to the message confirming the removal of this person’s role for the Org Unit. The user with the same role at the superior Org Unit now becomes the acting FDM role for that Org Unit.

**Replacing an Admin User**

To replace a POC, Supervisor, etc. with a different person, you must first delete the original POC, Supervisor, or Legal Reviewer association to that Org Unit and then assign the appropriate user to that role.

**Vacancies - Assigning a User to an Org Unit**

Assigning a role in FDM allows you to appoint a specific user to the vacant role. When a user’s role is removed from an Org Unit, the user with the matching role from the superior Org Unit becomes the acting DAEO, SLC, 450 Certifier, Supervisor or POC until another user is assigned. There is no need to assign a specific DAEO, SLC, 450 Certifier, Supervisor or POC to every subordinate Org Unit in FDM as long as there is a user assigned with the same role at an Org Unit that is above it in the hierarchy.

To assign a user to a vacant role:

1. Locate the Org Unit where the vacancy exists from the Next Level Down drop-down list.

   Note: If you are a Supervisor in FDM, you can click **Show Acting** on the Supervisors page to display those Org Units who have acting supervisors.

2. Click **Assign** beside the appropriate name.

3. Type at least three letters of the Last, First and/or Middle name and click **Search**.

   Note: The Search & Select New (FDM Role) search, searches within the selected agency’s the Global Directory. If searching by e-mail, enter the filer’s DOD Common Access Card embedded e-mail address only.

4. Click **Select** beside the name of the person you wish to assign to the vacant role.

**User Already has Selected Role with Another Org Unit Add [Role] Warning**

At times, the person you are assigning may already hold the same FDM role for another Org Unit. You will need to choose if this person should hold the same role for multiple Org Units in FDM.

5. Select the **Yes** to allow this person to hold the same role for multiple Org Units and then click **Confirm**.
The Notify function allows you to send e-mail notifications to a list of FDM users at the same time. For example, at the start of each filing season, you may wish to send e-mail notifications to the Supervisors on your list to begin the disclosure process.

1. Select the appropriate names and then click **Notify**. You can select more than one name at a time when sending notifications from FDM.
   - The “TO” field automatically populates with the e-mail addresses of the selected users.
   - The e-mail address of the sender automatically populates in the “CC” field.

2. Type a subject in the **Subject** field, compose a message in the **Message** field and then click **Notify**. A message is sent to the selected users and a copy is sent to the originator of the e-mail. You return to the Admin page.