



The FDM Org Unit tool allows you to categorize Filers into separate Org Units or departments by Supervisor based on their need to file a disclosure report.

The initial view of the Org Units page displays your Org Unit in the Breadcrumb Trail and any subordinate Org Units are listed below. You can identify Org Units that have a different person with the same role as you for that Org Unit by the triangle icon . You may view and work with these Org Units and its members; however, a different FDM user has the ultimate responsibility for these Org Units. You can “drill down” or view subordinate Org Units by clicking the down arrow beside any Org Unit Name.

ADDING A NEW ORG UNIT

Additional Org Units are only necessary when you need different or separate groupings of Filers such as at the beginning of the filing season when you may have new filers you need to group together. The structure of your Org Units in FDM should mirror the hierarchy of your organization.

1. From any point within FDM, click **Admin** and then **Org Unit**.
2. Click the Org Unit that will be superior to the Org Unit you are adding.

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

Verifying if the Org Unit Exists

Prior to adding a new Org Unit to FDM, first verify if this Org Unit already exists.

3. In the Name field, type the name of the Org Unit you wish to add and click **Search**. Review the list of matching results.

To add a new Org Unit:

4. Click **Add New Org Unit**.
5. 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. 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, 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.

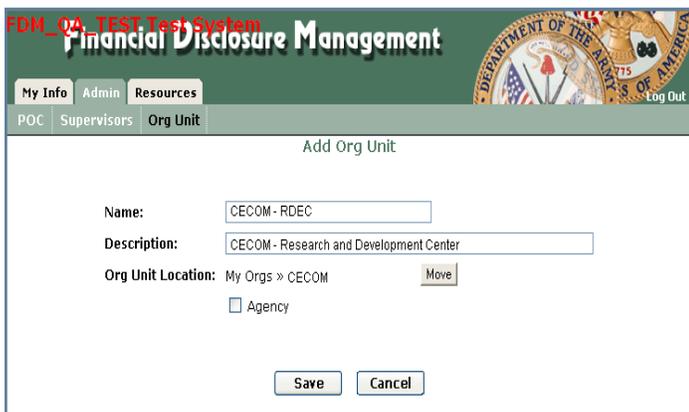
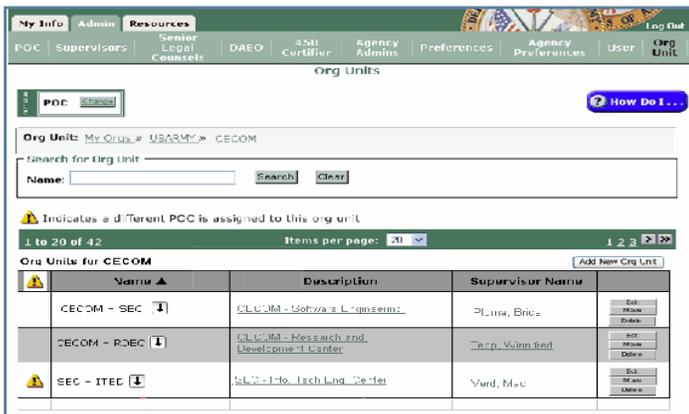
Move

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

Agency Org Units

Only System Administrators can create Agency Org Units. Creating an Agency Org Unit establishes a new Org Unit hierarchy.

6. Click **Save**, when complete.



EDITING AN ORG UNIT

Editing Org Units allows you to change an Org Unit Name and Description. Most often, Org Units should be updated when your Agency goes through a transformation or reorganization.

1. On the Org Unit page, click on **Edit** beside the Org Unit whose name has changed.
2. Update the Org Unit's Name and Description. When complete, click **Save**.

MOVING AN ORG UNIT

Moving Org Units allows you to align the filers and review chain participants appropriately after a transformation by placing an existing Org Unit under a different, superior Org Unit.

To move an Org Unit as a subordinate to a different Org Unit:

1. On the Org Units page, click **Move** beside the Org Unit who is reporting in to a different department now.
2. Click **Select** beside the Org Unit, which will be the new superior Org Unit for the Org Unit you are moving.
3. Click **OK** to the message confirming that you wish to make this move.

Reviewer Relationships Already Exist

At times, both Org Units, the one you are moving and the Org Unit you are moving to, may have existing review chain participant associations. You will need to choose the appropriate legal reviewer for the Org Unit you are moving.

4. Select **No** to use the review chain participants from the new main Org Unit or select **Yes**, to keep the subordinate Org Unit's existing legal reviewer associations.
5. Click **Confirm** when complete.

DELETING AN ORG UNIT

Deleting Org Units allows you to removed FDM Org Units when departments become consolidated after a transformation.

Important Information

- You cannot delete an Org Unit that has subordinate Org Units or Filers. If the Org Unit has subordinate Org Units and filers, the subordinate Org Units must be moved to other Org Units and the Filers must be re-associated with a different Org Unit first.

1. To begin, click Delete beside the Org Unit that no longer exists.
2. Click **OK** to the message confirming the deletion.

The screenshot shows the 'Move Org Unit' dialog in the FDM system. The title bar reads 'FDM_TRAIN Test System' and 'Financial Disclosure Management'. The main window title is 'Move Org Unit - OrgUnit SUPER_30, TR'. There is a 'How Do I...' help button. Below the title, there is a search field for the Org Unit name with 'Search' and 'Clear' buttons. A table titled 'Org Units for My Orgs' is displayed, showing one entry with columns for Name, Description, Location, and Supervisor Name. The entry is '11 - ALL' with description 'FED App Lic:10* Services DIV:10' and location 'SEC - F. In. Tech'. A 'Cancel' button is at the bottom.

Name	Description	Location	Supervisor Name
11 - ALL	FED App Lic:10* Services DIV:10	SEC - F. In. Tech	Word, M... <input type="button" value="Select"/>