



# Financial Disclosure Management Release 8.2.1.3

December 3, 2018

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# Introduction

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

## **8.2.1.3 Enhancements**

### **Defects and Changes**

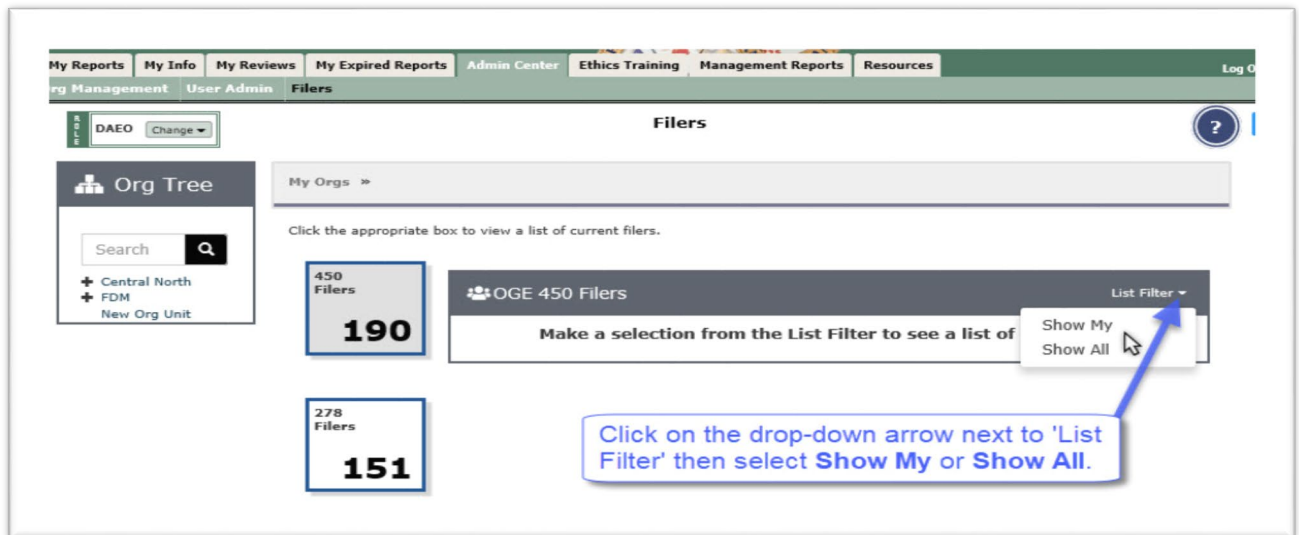
# Enhancements

## List Filters – Show My/Show All

You can now filter by Show My/Show All on the **Admin Center | User Admin** and **Admin Center | Filers** pages.

<b>Show My</b>	Limits the display list to users in the Org Units for which you are responsible.
<b>Show All</b>	Allows you to view all of the Users in the Org Units assigned to you and other FDM users with the same role.

Figure 1: FDM 2690 – Filter added to Admin Center Pages



# Sort Capability Added

Users can now sort user admin list for all their POCs, 450 Certifiers, Supervisors, SLCs and DAEOs by E-mail, Last Name, First Name, M.I., and Org Unit.

Figure 2: FDM 2701 – Sorting on User Admin List

The screenshot shows the 'User Admin' interface. On the left, there is an 'Org Tree' with a search box and a list of org units: Central North, FDM, and New Org Unit. Below this are three summary boxes: 'Points of Contact (POCs)' with a count of 82, 'Supervisors' with a count of 121, and '450 Certifiers' with a count of 88. The main area displays a table of users under the heading 'POCs'. The table has columns for E-mail, Last Name, First Name, M.I., Phone, Org Unit, and Org Unit Description. A search box is located in the top left of the table area. A callout box with a blue arrow points to the 'Last Name' column header, which has a small downward-pointing arrow next to it. The callout text reads: 'Use a field's sort arrows to sort by ascending or descending alphabetical order.'

E-mail	Last Name	Fi	M.I.	Phone	Org Unit	Org Unit Description
sandbox.com						
<a href="mailto:S.Zuki@FDMSandbox.com">S.Zuki@FDMSandbox.com</a>			X	000-000-0000	DISA 1-1-1-2-1	Defense Information Systems Agency 1-1-1-2-1
<a href="mailto:V.Toree@FDMSandbox.com">V.Toree@FDMSandbox.com</a>	Toree	Vic	X	000-000-0000	AMC	AMC
<a href="mailto:V.Toree@FDMSandbox.com">V.Toree@FDMSandbox.com</a>	Toree	Vic	X	000-000-0000	Confidential Filers	Confidential Filers
<a href="mailto:M.Taylor@sandbox.com">M.Taylor@sandbox.com</a>	Taylor	Margaret	X	000-000-0000	AMC 1	AMC 1

# Moving/Removing Reports

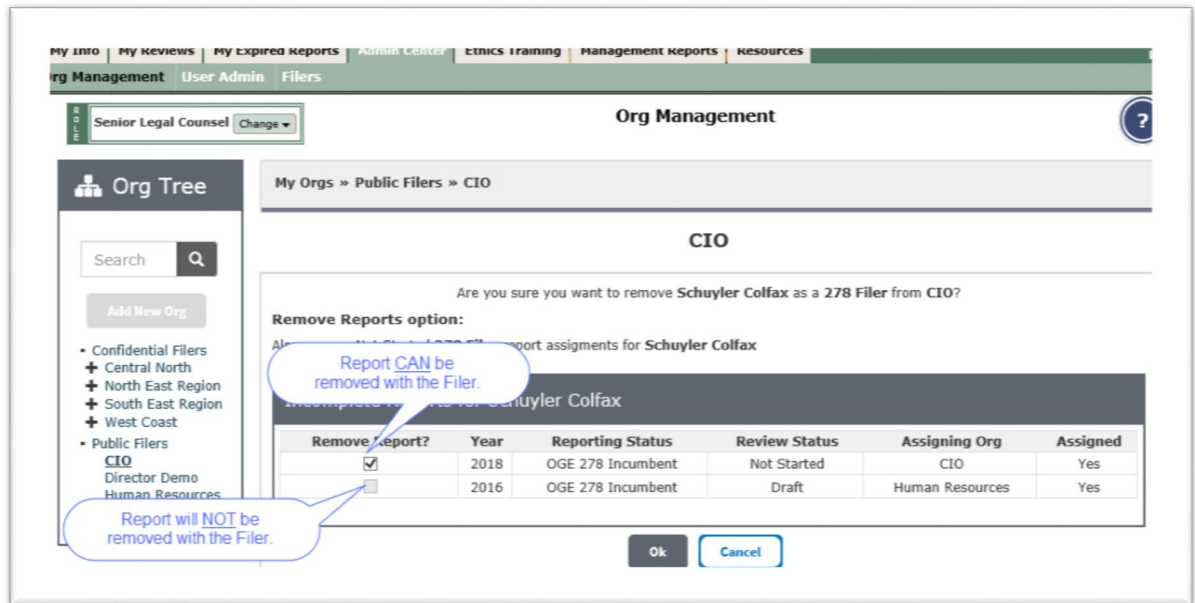
When moving a Filer or removing a Filer's role, you have the option to remove and/or move the Filer's reports depending which org unit assigned the report and the Report's Review Status.

## Remove Reports

The following options are available when removing a Filer's role.

Remove Report Checked	Able to uncheck/check	Definition
Yes	Yes	User can opt to remove the report as well or keep by checking.
No	No	Report cannot be removed when Filer's role is removed

Figure 3: FDM- 2682 – Remove Reports for Filer Table



**Note:** Reports are only eligible to be removed if the report has a Review Status of Not Started.

## Move Reports

The following options are available when moving a Filer to another Org Unit.

Remove Report Checked	Able to uncheck/check	Definition
Yes	No	Report will automatically move with the filer to the new Org Unit.
Yes	Yes	User can opt to move the report with the filer to the new Org Unit.
No	No	Report cannot move with the Filer to the new Org Unit.

**Figure 4: FDM- 2682 – Move Reports for Filer Table**

Are you sure you want to move **Brekinridge, John** as a 278 Filer from CIO to Director Demo?

**Move Reports option:**  
Review the list of reports associated with this filer. Reports that can be moved with this filer are selected. Any unassigned reports automatically move with the filer.

Move Report?	Year	Form Type	Reporting Status	Review Status	Assigning Org	Assigned
<input checked="" type="checkbox"/>	2018	OGE 278	Incumbent	Draft	CIO	No
<input checked="" type="checkbox"/>	2016	OGE 278	Termination	Under Review - Amendment in Progress	CIO	Yes
<input type="checkbox"/>	2017	OGE 278	Incumbent	Under Review - Amendment in Progress	DISA 1	No
<input type="checkbox"/>	2017	OGE 278		Draft	DISA 1	Yes
<input type="checkbox"/>				Complete	Director Demo	Yes
<input type="checkbox"/>	2016	OGE 278		Complete	Director Demo	Yes

Buttons: Yes No

**Note:** Reports are eligible to move with a filer to a different Org Unit:

- If the report is Self Started (Not Assigned)
- If the user moving the filer has access to the originally assigning Org Unit.
- If the report review status is not Complete.

# Defects and Changes

**FDM- 86** – The Asset Location Country no longer defaults to USA on the OGE 278 Transactions page. You must make a selection from the Country dropdown if you wish to add an Asset Location.

**FDM- 194, 2749** – The Actual Amount popup warning message when entering an OGE 278 Asset Value has been updated to “Please enter a dollar amount into the Actual Amount field. Avoid use of commas, decimals or minus (-) signs.”

**FDM- 452** – The Reports Not Started list now displays reports in the order listed below grouped by Due Date in ascending date order.

- New Entrant
- Annual/Incumbent
- Termination
- Incumbent Termination

**FDM- 485** – An Add Comment button has been included to the top of the Report Comments page to make adding comments easier.

**FDM- 2050** – Percentages display along with raw numbers in parenthesis on the Due Date Tracking Periodic Management Report Pie Chart.

**FDM- 2051** – Percentages display along with raw numbers in parenthesis on the Daily Extension Management Report Pie Chart.

**FDM 2052** – Percentages display along with raw numbers in parenthesis on the Ethics Training Management Report.

**FDM- 2460** – The Common Questions and Instructions on the OGE 278 Assets pages have been updated to reflect OGE’s required 2019 form changes.

**FDM- 2694** – The Supervisor’s name is now a “mailto:” link on Filer list.

**FDM- 2696** – Admin Filer list default is increased to 20 Filers.

**FDM- 2697** – Search fields in Admin center no longer retain the last entered search criteria in the search fields.

**FDM 2702** – Users can now sort by Org Unit on **Admin Center | Filer** list.

**FDM- 2703** – Users can now export a user admin list for all their POCs, 450 Certifiers, Supervisors, SLCs and DAEOs to Excel or a CSV file.

**FDM-2707** – The Common Questions and Instructions page on the OGE 450 and OGE 278 forms have been updated to reflect OGE’s required 2019 form changes.

**FDM- 2708** – Users can now filter by Org Unit Name in the **Admin Center | Filers**.



**FDM- 2282 & 2748** – The Reports Not Started page now displays when a Filer initially logs in to FDM.

**FDM- 2684** – The Report Assignment Due Date now defaults to the correct due date when assigning 2019 Incumbent and Annual Reports.

**FDM- 2685** – Reports Ready to be Purged category bars now display side-by-side in a Bar Graph.

**FDM- 2686** – 450 Certifier, POCs and Supervisors now have the ability to move dual hatted Filers.

**FDM- 2687** – The OGE Agency Management Report, Annual Extension Tracking report has been renamed to Extensions Granted by Calendar Year.

**FDM- 2688** – The Org Tree search is now functioning properly.

**FDM- 2700** – The OGE 450 Remove Filer notification now appropriately cc's the 450 Certifier.

**FDM- 2704** – The User Admin | Org Member Panel counts now display the correct counts for the select Org Unit when navigating the Org Tree.

**FDM- 2719** – When moving an org unit with a directly assigned Org Member under an Org with the same directly assigned Org Member, FDM now appropriately displays the Org Member of the sub Org Unit as Acting.

**FDM 2729** – Report assignment year now correctly defaults to the current year.

**FDM- 2738** – Removed extra "S" in the Daily Extension Tracking rollover text

**FDM- 2739** – POCs and Supervisors are now included in the "Replace Org Member" warning when moving Sub-Org Units.

**FDM- 2740** – 'Middle Name' has been changed to 'Middle Initial' in the **Admin Center| User Admin** list page.

**FDM- 2742** – DAEOs and DAEO ECs no longer get an application error when viewing a 450 report.

**FDM- 2743** – Admin Center| User Admin exported spreadsheets no longer have (Acting) column

**FDM- 2745** – Agency now correctly defaults to DoD when adding a Filer Assistant.

**FDM- 2747** – The 'Other' Training Method(s) text box is now active when recording Ethics Training for a user.