

Financial Disclosure Management

Release 8.3.0.5

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Introduction

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

8.3.0.5 ENHANCEMENTS

Defects and Changes

FDM Account Profile

All FDM users have an account profile. Your FDM account profile contains:

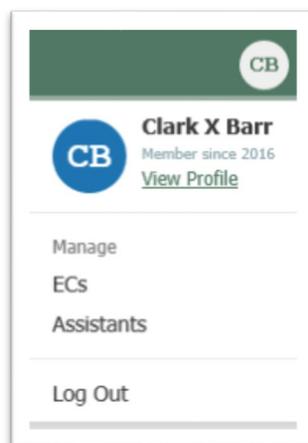
- personal details such as name, telephone number and email address
- report contact information.
- roles you hold in FDM,
- a listing of assistants and ECs you may have
- a history of actions that have been applied to your FDM account.

Best Practice

Filers should update their account profile information prior to starting a new report in FDM. Any updates made to your account profile copy into the Report Contact information section of any reports not yet signed by a filer (Review Status of Not Started, Draft, and Amendment in Progress.)

PROFILE

1. From any point within FDM, click on your initials or profile image and then click **View Profile**.



2. Enter or update your:
 - Profile Details such as name, email and phone number.
 - Mailing Address.
 - Report Related information if you are a Filer.

Figure 1: FDM User Profile

The screenshot shows the FDM User Profile page for Clark X Barr. The page is divided into several sections:

- Navigation Menu:** My Reports, My Reviews, My Expired Reports, Admin Center, Ethics Training, Management Reports, Resources.
- User Profile Header:** CB Clark X Barr, Member since 2015.
- Profile Menu:** Profile (selected), Assistants, ECs, Roles, History.
- Details Section:**
 - General Contact Information:** Last Name (Barr), First Name (Clark), MI (Optional) (X).
 - E-Mail:** C.Barr@FDMSandbox.com.
 - Confirm E-Mail:** C.Barr@FDMSandbox.com.
 - Phone:** 000-000-0000.
 - DSN (Optional):** [Empty field]
- Mailing Address Section:**
 - Street Address:** Addr1.
 - Bldg/Apt/Suite/Other (Optional):** Addr2.
 - City/Province:** City.
 - State:** AK (checked).
 - Zip Code:** 00000 (with 000 in a separate field).
 - Country:** UNITED STATES (checked).
- Report Related Section:**
 - Grade:** 13.
 - Branch/Unit:** [Empty field]
 - Agency:** [Empty field]
 - Position/Title:** [Empty field]
- Save Changes:** Button at the bottom.

ASSISTANTS

FDM users with a 450 Certifier or SLC role can designate someone to assist them with their FDM tasks. Use the Assistants section to add or remove an assistant to yourself. You can also see a list of users who have added you as an assistant to them.

Figure 2: Assistants

The screenshot displays the 'My Assistants' section of a user interface. The user is identified as Clark X Barre, a member since 2016. The navigation menu on the left includes Profile, Assistants (selected), ECs, Roles, and History. The main content area is divided into two sections:

- My Assistants:** This section features a table with columns for Name, E-mail, and a '+Add' button. A dropdown menu is open, showing two options: '450 Filer Assistant' and '450 Certifier Assistant'. Below the table, it states 'No Assistants Found'.
- I am an Assistant to:** This section features a table with columns for Who I Assist, E-mail, Org Name, and Asst Role. One entry is visible: Enike, Mike X, M.Enike@FDMSandbox.com, South East 4, 450 Filer Assistant.

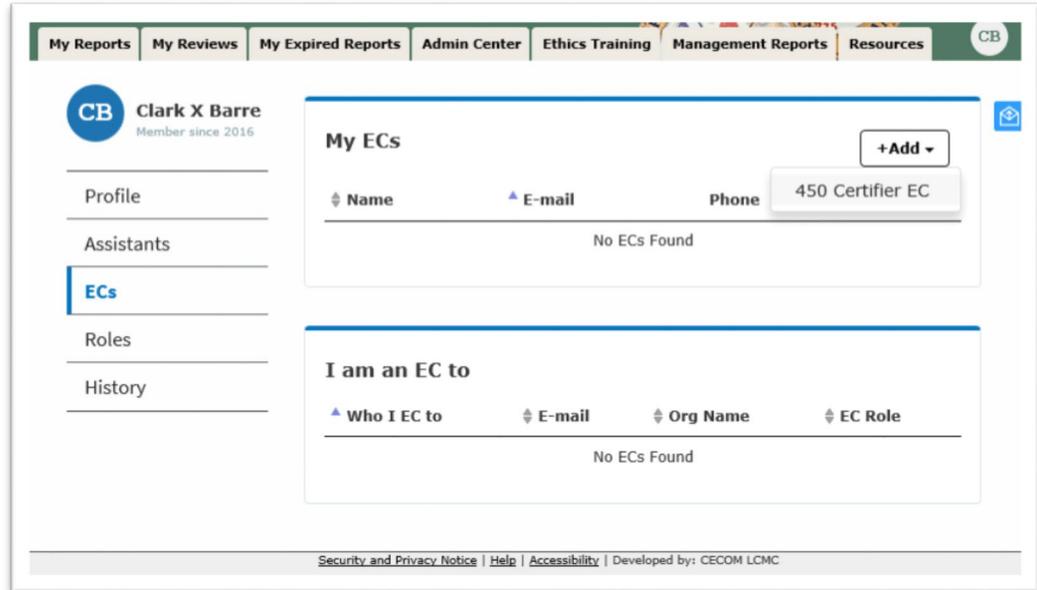
At the bottom of the page, there is a footer with links for Security and Privacy Notice, Help, Accessibility, and a note that the page was developed by CECOM LCMC.

1. Click **+Add** to add someone as an assistant to you.

ECs

FDM users with a 450 Certifier, SLC or DAEO role can designate someone as an EC to them to assist with their FDM reviewer tasks. Use the ECs section to add or remove an EC to yourself. You can also see a list of users who have added you as an EC to them.

Figure 3: ECs



1. Click **+Add** to add someone as an assistant to you.

ROLES

The Roles section of your Profile contains a listing of all your roles in FDM along with the Org Units to which they are associated. FDM Reviewers can also view a list of their Custom Reviewer roles along with the associated report and Filer.

Figure 3: Roles

The screenshot shows a user profile for Clark X Barre (Member since 2015) with a navigation menu on the left containing Profile, Assistants, ECs, Roles (selected), and History. The main content area is divided into two sections: 'Roles' and 'Custom Reviewer Roles'. The 'Roles' section contains a table with columns for Role and Org Name, listing 450 Certifier (South East 4), 450 Filer (South East Region), POC (TOP LEVEL ORG), and Supervisor (South East 4). The 'Custom Reviewer Roles' section contains a table with columns for Role, Filer's Report, and Filer Name, and displays 'No Custom Roles Found'. The footer includes links for Security and Privacy Notice, Help, Accessibility, and is developed by CECOM LCMC.

Role	Org Name
450 Certifier	South East 4
450 Filer	South East Region
POC	TOP LEVEL ORG
Supervisor	South East 4

Role	Filer's Report	Filer Name
No Custom Roles Found		

HISTORY

The History section of your Profile allows you to view a history of your FDM account activity.

Figure 5: History

The screenshot shows the user history page for Clark X Barre. The top navigation bar includes: My Reports, My Reviews, My Expired Reports, Admin Center, Ethics Training, Management Reports, Resources, and a user profile icon (CB). The left sidebar shows the user's profile information: Clark X Barre, Member since 2016, with links for Profile, Assistants, ECs, Roles, and History (which is highlighted). The main content area is titled "User History" and features a "Show 100 entries" dropdown menu and a page indicator "1". The history list contains the following entries:

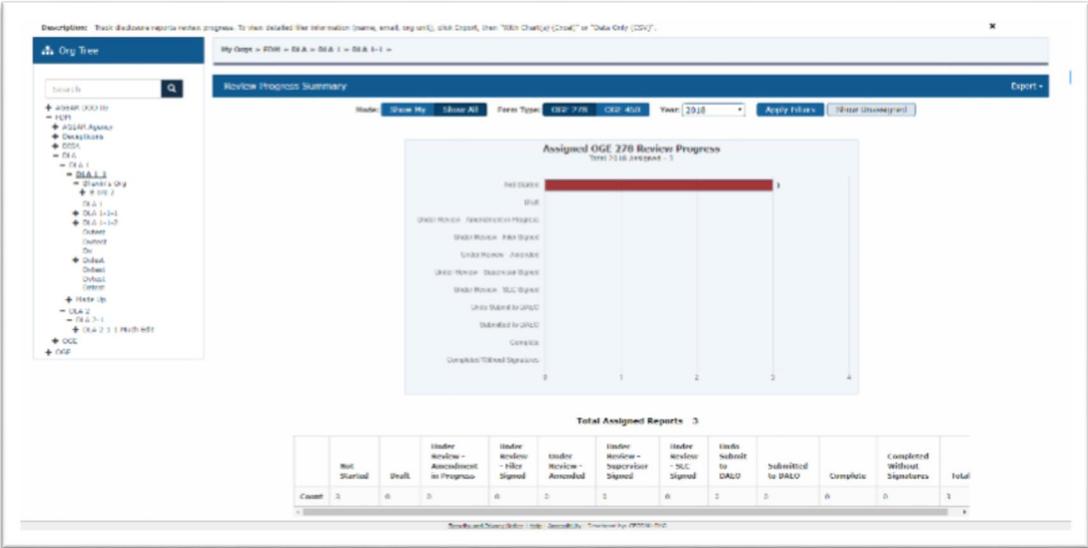
- Added as a 450 Filer Assistant to 450 Filer Enike, Mike X Barre, Clark X - 450 Certifier - Feb 6, 2019 12:51 PM CST
- Assigned Report 2019 OGE 450 Annual Burst, Starr X - POC - Feb 6, 2019 12:26 PM CST
- Edited Due Date 2018 OGE 450 New Entrant Other, 278_23 - 450 Certifier - Nov 28, 2018 09:45 AM CST
- Edited Due Date 2018 OGE 450 New Entrant Other, 278_23 - 450 Certifier - Nov 28, 2018 09:32 AM CST
- Edited Due Date 2018 OGE 450 New Entrant Other, 278_23 - 450 Certifier - Nov 28, 2018 09:32 AM CST
- Assigned Report 2018 OGE 450 New Entrant Other, 278_23 - 450 Certifier - Nov 28, 2018 09:31 AM CST
- Removed Report Assignment 2018 OGE 450 New Entrant Other, 278_23 - 450 Certifier - Nov 28, 2018 09:30 AM CST

Management Reports

ORG TREE NAVIGATION

The Org Tree replaces the Org Unit Breadcrumb trail when navigating through Management Reports in FDM.

Figure 6: Management Report with Org Tree Navigation



Search Filters

The Admin Center and Management Reports Search filters have been redesigned to improve search results and make it easier to find what you are looking for. Available filter options vary depending on FDM page you are on.

Set your filters to display the search results you want to see by clicking the Filter Name and then selecting a filter value from the available list. Some filters require you to enter specific criteria to filter your search results on.

Filter Name	Filter Options	Description
Mode (REQUIRED)	<ul style="list-style-type: none"> Show All Show My 	<p>Show My limits your search result to information for which you are responsible.</p> <p>Show All allows you to view all of the relevant information for the org units assigned to you and other FDM uses with the same role.</p>
Add Filter (OPTIONAL)	<ul style="list-style-type: none"> E-mail Last Name First Name Middle Initial Org Name 	You can select one or more filter values from the Add Filter option. And then, specify your search criteria.
No Current Report (OPTIONAL)		Limits your list of results to Filers who do not have a currently assigned report in FDM.
Form Type (REQUIRED)	<ul style="list-style-type: none"> OGE 450 OGE 278 	Limits your list of results to either OGE 278 or OGE 450 reports.
Year (REQUIRED)	<ul style="list-style-type: none"> Current Year plus the previous 6 calendar years 	Limits your list of results to data within the selected year.

Login

The Login page has been redesigned.

- The Government Network Acceptance message is no longer a pop-up. Users must still accept the user agreement prior to being allowed to log in.
- Forgot password? Link has been added to direct users who login with Username and Password to their appropriate contact.

Figure 7: FDM Login Page

The screenshot displays the FDM Login Page with the following elements:

- Header:** Financial Disclosure Management logo.
- Navigation:** Two tabs: "PIV or CAC" and "Username & Password".
- PIV or CAC Section:**
 - Image of a PIV/CAC card with "DATEXXXX", "SAMPLE", "Affiliate Contractor", "Agency Contractor", and "Buyer Contractor" labels.
 - Button: "Login with PIV/CAC"
- Username & Password Section:**
 - Label: "Login Using:"
 - Dropdown menu: "Test" (selected)
 - Label: "Username:"
 - Text input field
 - Label: "Password:"
 - Text input field
 - Link: "Forgot Password?"
 - Button: "Login with Username"
- Footer:**
 - Red "PREVIEW" banner.
 - Text: "Do you need assistance? Call (443) 861-8247, DSN 848-8247 or email usarmy.APG.cecom.mbx.FDMSpt@mail.mil
 - Green bar: "This information system is approved for UNCLASSIFIED/FOUO data."

Defects and Changes

FDM-2668 – Users can now click X on any Management Report page to return to the previously viewed page.

FDM- 2693 – Addition of Currently Assigned column on Admin Center | Filers list to see the currently assigned report for a filer. Consolidation of columns to allow for column addition

FDM-2750 – Instructions added to the Admin Center User Admin page.

FDM-2759 – Page navigation added to search results tables at top and bottom.

FDM-2807 – Filers sub tab removed from the My Reviews navigation tab. To add and manage org unit Filers, go to **Admin Center | Org Unit Filers** or use **Admin Center | Filers** page to review and update your filer list prior to filing season

FDM-2983 – Users can now click on Org Unit name link to view a list of Org Unit members without leaving the current view.

FDM-3445 – Edit Logins capabilities removed from the user's profile.