Financial Disclosure Management
Release 8.4.1.4

November 20, 2019

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Introduction

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

8.4.1.4 ENHANCEMENTS

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Enhancements

NOTIFICATIONS

Notifications replace the Remind Filers and Remind Supervisors feature. Use the Notification tool to identify, monitor and send notifications to users who have not completed a filing or reviewing action. You can also now send bulk notifications to a group of FDM users at the same time.

Reminder Notifications

Use the Remind Filter to identify filers, supervisors and SLCs who have not completed a filing or reviewing process and send them reminder to complete the action.

The following reminder options are available:

Filers

- Initial Notification - Initial notification is only for those Filers who have been assigned a current year report. Use this option to locate Filers who are assigned an Annual Report and send a notification to remind them of their annual requirement to file.

- Not Started - Use this option to locate Filers who have not started their report.

- Not Submitted - Use this option to locate Filers who have not eSigned their report.

- Late - Use this option to locate Filers who are delinquent in eSigning their report.

Supervisor or SLC

- Not eSigned – Use this option to locate Supervisors or SLCs who have not eSigned a submitted report.

Note: When sending reminder notifications, you can opt to send a summary email to any associated POCs and Supervisors.

Bulk Notifications

You can also send a group of users with the same role a notification.

Filtering and sorting

Filtering and sorting allows you to quickly view and group the information you are viewing by specific criteria. The Notifications Search filters have been redesigned to improve search results and make it easier to find what you are looking for.

Set your filters to specify the users you wish to display.

You can sort the Notifications list by E-mail, Name, Org Unit, Report Status, Review Status and Supervisor.

| Filter Name	Filter Options	Description
Mode (REQUIRED)	• Show All • Show My	Show My limits your search result to information for which you are responsible. 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.
Form Type (REQUIRED)	• OGE 450 • OGE 278	Limits your list of results to either OGE 278 of OGE 450 reports.
Add Filter: Reminder (OPTIONAL)	• Initial Notification • Not Started • Not Submitted • Late • Not eSigned	Limits your list of results to users who have not completed the selected Remind filter action.

Sending Notifications

1. Go to the **Notifications** tab and select the specific group of the users whom you wish to notify.

Figure 1: Notifications Filters
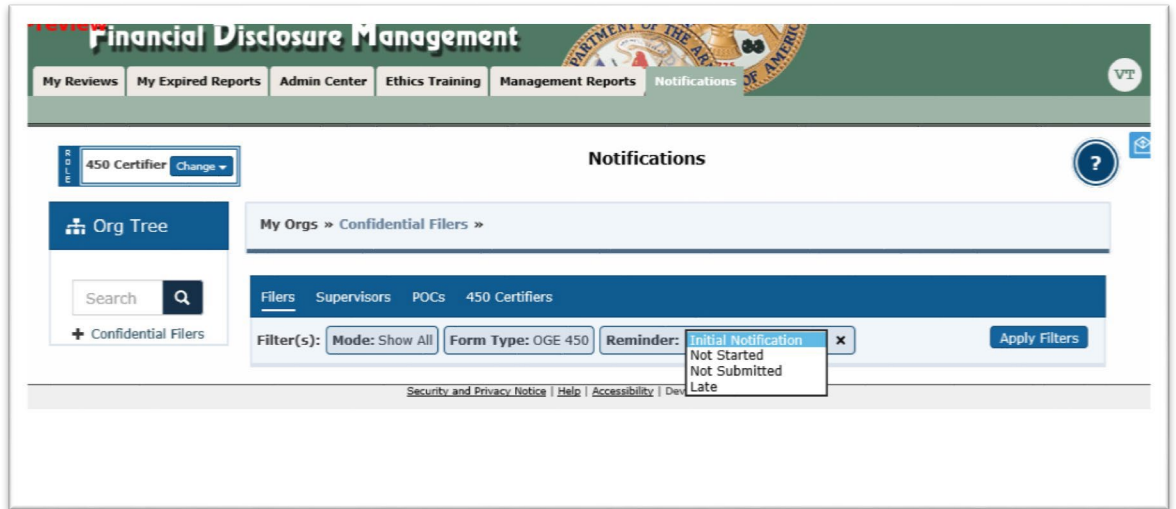
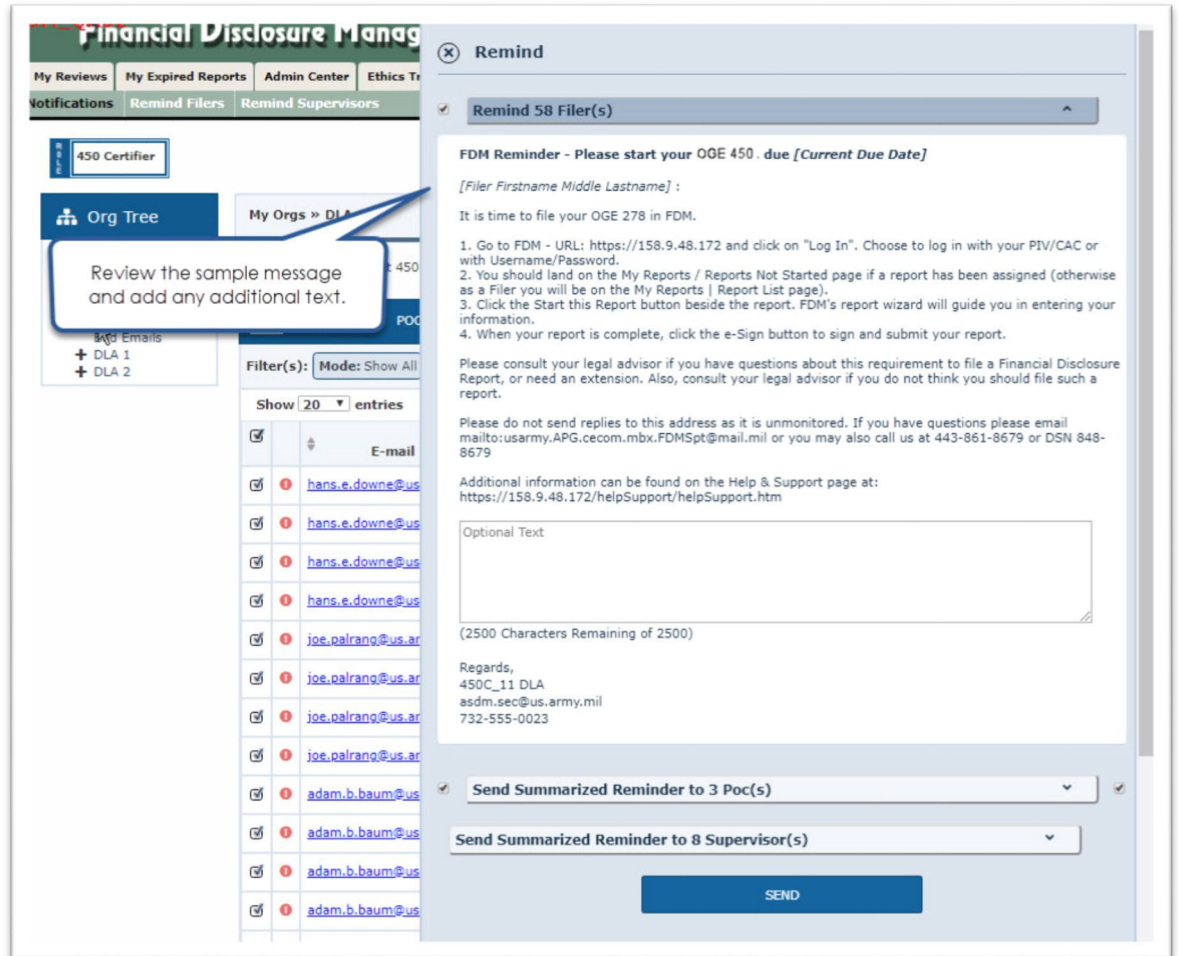2. Select the appropriate filters and click **Apply Filters**.

Figure 2: Notifications List
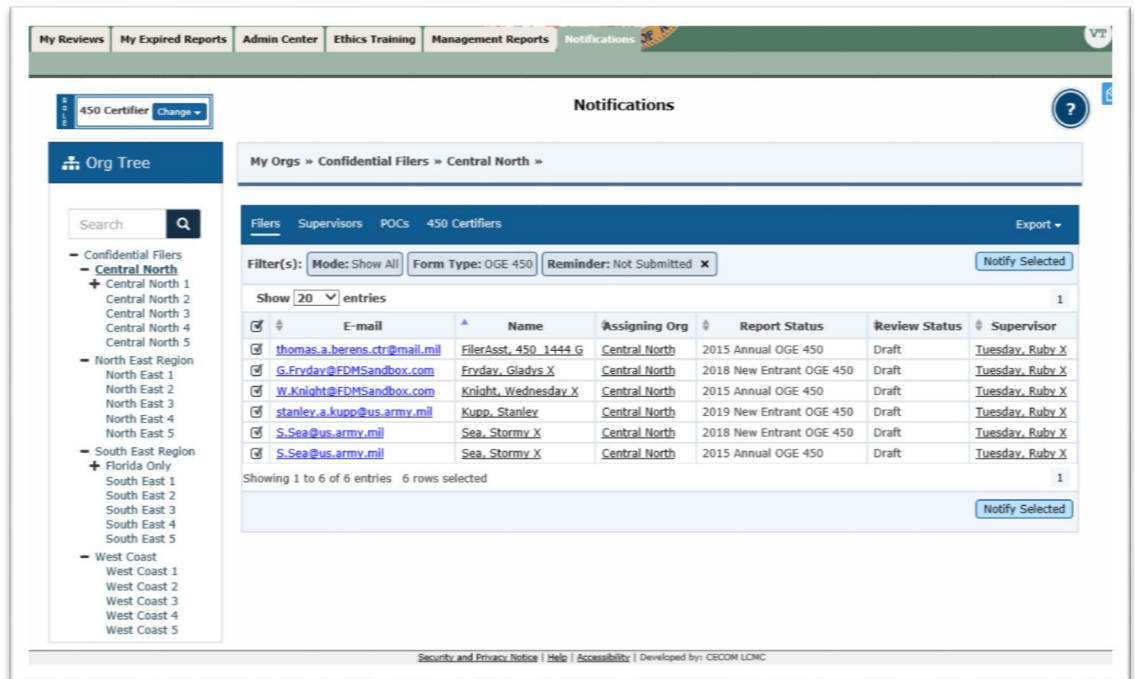
Note: You can deselect any of the users listed whom you do not wish to send a notification.

3. Review your list to be sure you have the appropriate users are selected and then click **Notify Selected**.

Figure 3: Notification Message

4. If you elected to send a reminder notification, add any additional text to the templated message. If you elected to send a Bulk message, enter your text into the appropriate field and then click **Send**.

FDM Notification History

You can now see which notifications you received and which notifications you sent in your Profile History.

Figure 4: Notification History

BLANK REPORTS – REPORTS THAT DO NOT CONTAIN ANY LINE ITEMS

On the My Reviews | Review Reports page in Worklist View, users can now filter the Worklist to list only reports which do not contain any report line items.

Figure 5: Worklist with Blank Reports

To view a list of reports which do not contain any line items:

1. Go to **My Reviews | Review Reports**.

2. Select the appropriate criteria and click the check box that says **Blank Reports**.

3. Click **Search**. A list of reports which do not contain any report line items is displayed.

   Note: The Blank Reports filter option is available in Worklist View Mode only.

DELETE DRAFT REPORTS WHEN FILER ROLE REMOVED

Draft reports are now eligible for deletion when removing a filer role.

Figure 6: Worklist with Blank Reports

Defects and Changes

FDM- 253 – Notifications sent from FDM_donotreply@conus.army.mil now explicitly state that the email address is unmonitored.

FDM- 268 – The mailbox notification button was removed from the My Reviews | Review Status screen.

FDM- 1156 – Report assignment notifications are now formatted so they are easier to read in plain text view.

FDM- 1453 – FDM notifications no longer include directions to use AKO username/password to log in to FDM.

FDM- 1780 – All FDM notifications now include a link to the FDM site.

FDM-2841 – All users can now use the criteria "Starts With", "Ends With", and "Equals" when searching for new users to add from the agency directory.

FDM- 3054 – An e-mail reminder to review outstanding reports will now be sent to report certifiers on a weekly basis between March 1 and December 31.

FDM-3456 – EC and Assistant roles can now search for Org Units in the Org Tree search bar.

FDM-3602 – The Resources tab was removed from the application.

FDM-3616 – Reminder to Purge notifications are no longer sent to ECs who are not authorized purge reports.

FDM-3640 – Creation of 278 Transaction life assurance assets no longer result in an application error.