

## Org Tree

- ◆ The Org Tree is a hierarchical display of the Org Units that you can manage.
- ◆ You can view and manage all Org Units and members within your Org Tree hierarchy.
- ◆ The viewable org unit hierarchy is dependent on your selected role.
- ◆ The initial view of the Org Tree displays your top-level Org Unit and any subordinate Org Units.

## Navigating the Org Tree

1. Go to **Admin Center** tab then expand the Org Tree by selecting the **plus sign (+)** beside an Org Unit in your list.
2. Click the **minus sign (-)** beside an Org Unit to collapse or hide subordinate Org Units.
3. Select an Org Unit name to view its Profile.

## Searching for an Org Unit:

1. Click the **Admin Center** tab and then click **Org Management**.
2. In the search box at the top of the Org Tree, begin typing the name of the Org Unit you wish to locate.
3. Click on the Org Unit name once it appears in the search results drop-down field.

The screenshot shows the FDM system interface. At the top, there are navigation tabs: My Info, My Reviews, My Expired Reports, Admin Center, Ethics Training, Management Reports, Resources, and Log Out. Below this is the 'Org Management' section. On the left, the 'Org Tree' is displayed with a search box and an 'Add New Org' button. The tree shows a hierarchy starting with 'TOP LEVEL ORG', followed by 'Confidential Filers' (with a minus sign), and then several regional and organizational units with plus signs. The 'CERDEC ASD PO' unit is highlighted. Three callout boxes provide instructions: 'Search for a specific Org.' points to the search box; 'Use the Org Tree to view FDM Org Units.' points to the tree structure; and 'Clicking the + sign beside an org name, expands the org tree to display the next level of org units in the hierarchy.' points to the plus sign next to 'CERDEC ASD PO'. On the right, the 'Profile' for 'CERDEC ASD PO' is shown, including 'Basic Details' (Name, Description, Agency) and 'Actions' (Move, Remove). Below that is a table for 'Org Unit Role Assignments'.

Roles	Current Assignments
POC(s)	Not Assigned (Oakley, Carrie acting)
Supervisor	Turner, Paige
450 Certifier	Not Assigned (Teak, Anne acting)
Senior Legal Counsel	Not Assigned (Turner, Paige acting)
DAEO	ALL Roles, Sys_1450 X

## Adding New Org Units

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.

1. Go to **Admin Center | Org Management** then select the Org Unit in the Org Tree where the new Org Unit will be added.
2. Click **Add New Org** and then type the appropriate Name and Description for the new Org Unit.

### Org Unit Name and Description

- ♦ The Org Unit Name must be unique and should accurately reflect the Org Unit of filers you supervise.
  - ♦ 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.
3. When complete, click **Save** then **OK** to confirm the addition of the new Org Unit.

**Click Add New Org Unit**

**Type the new Org Unit Name and Description**

**Click Save.**

**Org Management - Add New Org Unit**

**Instructions**  
Org Unit name must be unique and no longer than 20 alphanumeric characters.  
Use the Description field to describe the Org Unit. Description is limited to 100 alphanumeric characters.

**ADD BASIC DETAILS**

**Name:**  
CECOM-RDEC

**Description:**  
CECOM Research and Development Center

**ACTIONS**  
Save Cancel

**Org Unit Role Assignments**

Roles	Current Assignments
POC(s)	Not Assigned (Parent, Supervisor_1434 X acting)
Supervisor	Not Assigned (Wynd, Augusta X acting)
450 Certifier	Not Assigned (Raine, Misty X acting)
Senior Legal Counsel	Not Assigned (DAEO, Confidential X acting)
DAEO	Not Assigned (DAEO, Confidential X acting)

## Editing an Org Unit

Editing an Org Unit allows you to change the Org Unit Name and Description.

1. On the Org Unit Profile page, click **Edit** button in the Org Profile Basic Details on the right.
2. Update the Org Unit Name and/or Description as needed and then click **Save**.

## Moving Org Units

Due to changes in your organization, you may need to move an Org Unit. This may change the review chain.

1. On the Org Unit Profile page, click the **Move** button in the Actions column of the Org Unit profile.
2. Select an Org Unit from the Org Tree that you want the moving Org Unit to fall under and then click **OK** to confirm.
  - ♦ 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. Choose from the list of legal reviewers.

## Removing Org Units

Before you can delete an Org Unit, you will need to move any associated Filers and Sub-Org units.

1. On the Org Unit Profile page, click on the button that says **Remove** in the Actions section of the Org Unit profile.
2. Click **Ok** to confirm.

**Org Management**

My Orgs » TOP LEVEL ORG » RDECOM » CERDEC ASD » CERDEC ASD PO »

Profile | Org Unit Members | Org Unit Filers | History

**CERDEC ASD PO**

Use Move or Remove to make changes to your org structure

Actions

Move Remove

Org Unit Role Assignments

Roles	Current Assignments
POC(s)	Not Assigned (Oakey, Carrie acting)
Supervisor	Turner, Paige
450 Certifier	Not Assigned (Teak, Anne acting)
Senior Legal Counsel	Not Assigned (Turner, Paige acting)
DAEO	ALL Roles, Sys_1450 X

Basic Details

Name: CERDEC ASD PO

Description: CERDEC ASD Project Office

Agency: DLA

Click to update the Org Name and Description

Security and Privacy Notice | Help | Accessibility | Developed by: CECOM LCMC

**Org Management**

My Orgs » TOP LEVEL ORG » Confidential Filers » North East Region » North East 1

**North East 1**

Warning - DAEO/SLC/450 Certifier Already Exists

Replace existing 450 Certifier, Gail X Winds with Gail X Storm

Ok Cancel

**Org Management**

My Orgs » TOP LEVEL ORG » Confidential Filers » North East Region » North East 1

**North East 1**

Are you sure you want to delete Org Unit North East 1?

Yes No

## Assigning Org Members to an Org Unit

1. Go to **Admin Center | Org Management** then select the Org Unit in the Org Tree where the new Org Member will be added.
2. Click the **Org Unit Members** tab.
3. Click the **+Assign** or **Replace** button to assign or Replace someone as an Org Member.
4. Select the appropriate **Agency Directory** from the drop-down list and then type the new Org Member's e-mail address in the e-mail field then click **Search**.
5. Select the individual whom you wish to add by clicking the **plus (+) sign** beside their name.

Org Unit Members tab displays a list of the Org Unit Review Chain and POCs.

Search through your agency directory to add or replace an Org Unit Member.

Click Add, Replace or Remove to update the Org Unit Members

## Removing Org Members

Removing a review chain participant simply removes their association to a selected Org Unit.

1. Click the **Remove button (X)** next to the Org Member you wish to remove and then click **OK**.

## Editing Org Unit Members

1. On the **Org Unit Members** page, click the **+Assign** or **Replace** link to assign or replace someone as an Org Member.

## Search & Select

2. Select the appropriate **Agency Directory** from the drop-down list, type the new Org Member's e-mail address and then click **Search**.
3. In the search results list, select the individual whom you wish to add by clicking the **plus (+) sign** beside their name.

North East 1

Search for POC

Agency Directory: DoD

E-mail:

Last Name: Wynd

First Name: augusta

Middle Name:

Show 10 entries

In FDM?	E-mail	Last Name	First Name	Middle Name	Phone
Yes	<a href="mailto:A.Wynd@FDMSandbox.com">A.Wynd@FDMSandbox.com</a>	Wynd	Augusta	X	000-000-0000

Showing 1 to 1 of 1 entries