



FDM "Org Units" group Filers by reviewing Supervisor. Agencies that do not use Supervisory review assign a paralegal or legal clerk in the Supervisor role to perform a technical screening for completeness.

In the paper filing process, an ethics counselor or administrative assistant routinely groups Filers into organizations or departments. The Org Units tool simply allows you to do this process online in FDM, eliminating the need to have a paper-tracking system to manage your Filers.

Org Units are simply an electronic version of your agency organization structure. Determine your organizational structure by using an organization chart or wire diagram. Use this same structure as the model for your Org Unit structure in FDM.

ADDING A NEW ORG UNIT

Additional Org Units are necessary when you need different or separate groupings of Filers and review chain participants.

Note: A new org unit is not required when a successor Supervisor replaces an incumbent one. In that case, simply delete the departed Supervisor and assign the new one.

You can add a new Org Unit and assign roles on the Admin / Org Units page.

1. From any point within FDM, go to **ADMIN | ORG UNITS**.
2. On the list, locate the Org Unit you wish to place the sub org unit under and click on the down arrow.
3. Click **ADD NEW ORG UNIT**.

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

4. Type the **ORG UNIT NAME** and **DESCRIPTION**.

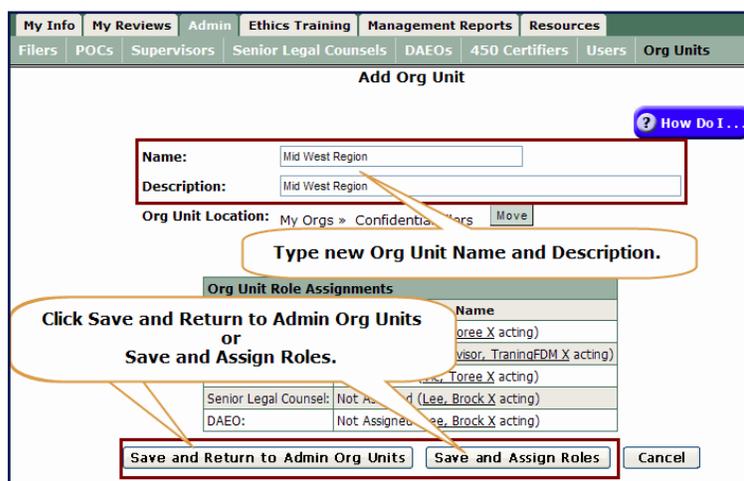
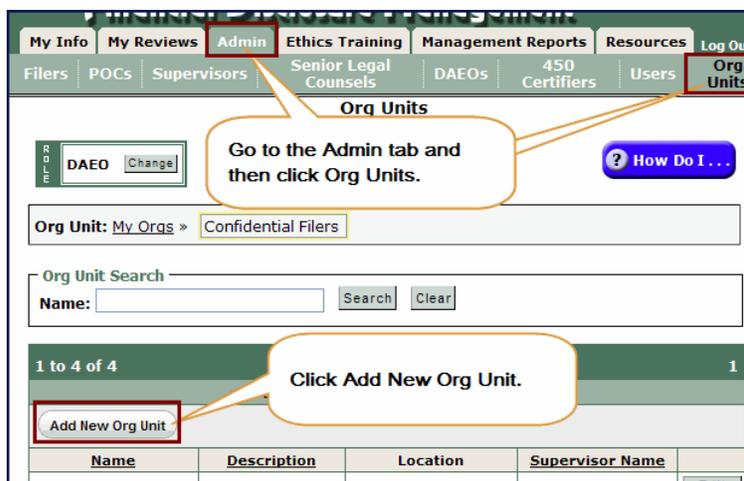
Org Unit Name

- 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 supervised. 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.

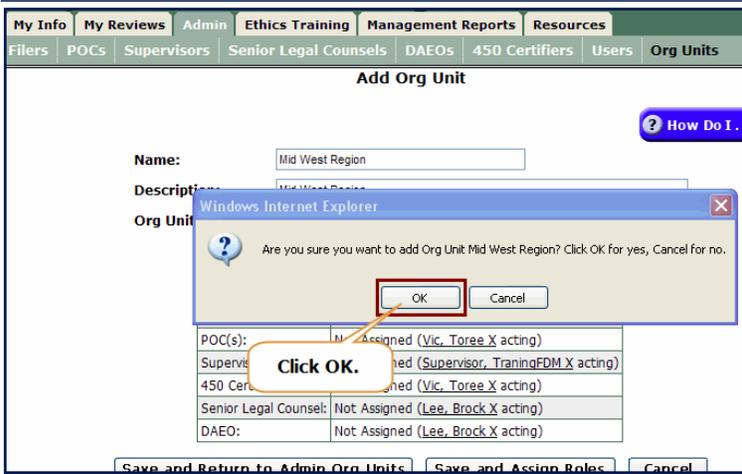
Org Unit Description

- 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.

5. Click **SAVE AND RETURN TO ADMIN ORG UNITS** if you do not need to make any other changes to your newly added org unit. Click **SAVE AND ASSIGN ROLES** to assign specific org unit members in place of the acting org unit members.



ASSIGNING ORG UNIT ROLES



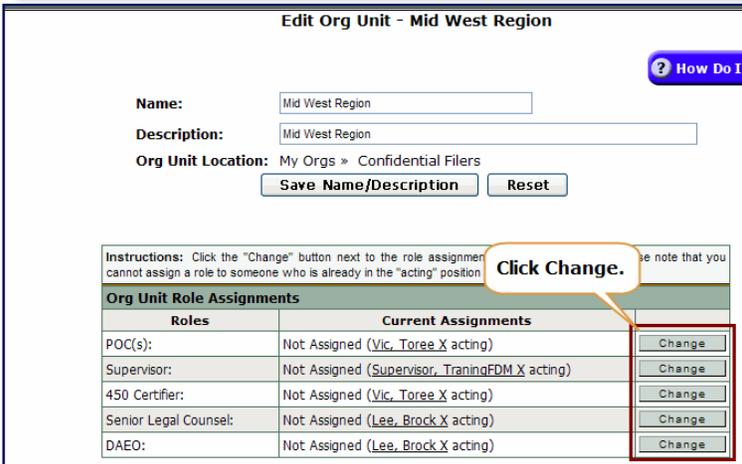
1. Click **SAVE AND ASSIGN ROLES** to assign a specific org unit role.

Note: When an Org Unit does not have an assigned Review Chain Participant or POC, FDM assigns the person in that role in the Org Unit that is the next level up in hierarchy and their name displays as acting.

2. Click **OK** to confirm adding this org unit.

3. Click the **CHANGE** button beside any of the listed org unit roles.

Note: Only those roles that you have permission to change will display a Change button.



4. Type the new org unit member's e-mail address in the e-mail starts with box.

Note: If you don't have the e-mail address, you can search by Last and First Name.

5. Select the appropriate Agency Directory from the drop-down list and then click **SEARCH**.

Note: The Search & Select New (FDM Role) search, searches within the selected agency's directory.

6. Click **SELECT** beside the name of the person you want to add.

Note: The Search Results display. If more than one name is listed, be sure to check the e-mail address to ensure you are selecting the correct person.



7. **CONFIRM** your selection. You return to the Edit Org Unit page and your newly added org unit member displays.

Note: If you want to change another role, depending on your permissions, click on the **Change** button for that role and repeat the above process.

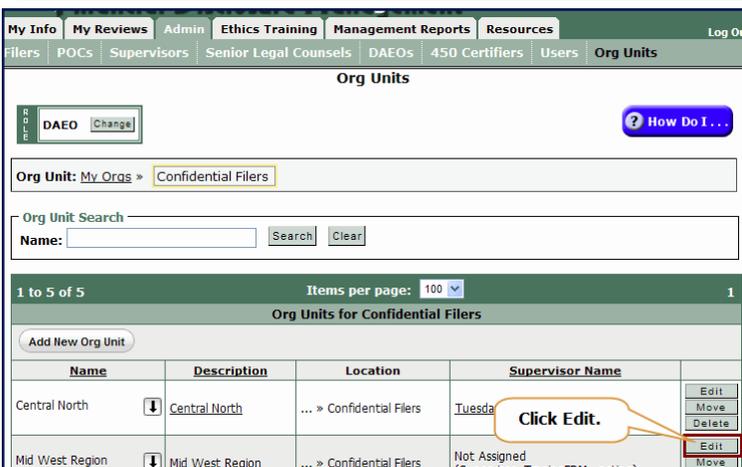
8. Click **RETURN TO ADMIN ORG UNITS LIST**.

EDITING AN ORG UNIT

Click **EDIT** to change an Org Unit name, description, or replace roles.

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** or follow the directions below to update any org unit roles.



Replacing Org Role Assignments

When editing an org unit you can also replace or remove the currently assigned org unit role.

FDM automatically assigns the org unit role from the superior Org Unit as the acting org unit role until a different org unit role is assigned.

If the person is associated to all of the subordinate org units, there is no need to assign that person to each subordinate org unit. In fact, you may not need the subordinate Org Unit in that case.

Update the org unit name or description.

Click Change beside the person you wish to change.

Click Change beside the person you wish to change.

Roles	Current Assignments	
Org Unit POC:	Kin, Manny X	Change
Supervisor:	Not Assigned (Supervisor, TrainingFDM X acting)	Change
450 Certifier:	Not Assigned (Vic, Toree X acting)	Change
Senior Legal Counsel:	Not Assigned (Lee, Brock X acting)	Change
DAEO:	Not Assigned (Lee, Brock X acting)	Change

3. Click **CHANGE** beside the org unit role you wish to change.

4. Select **REPLACE CURRENT ORG UNIT ROLE** and then click **CONTINUE**.

Note: You can add additional POCs to assist with the administration of this org unit.

5. Type the new org unit role's e-mail address in the e-mail starts with box, select the appropriate Agency Directory and then click **SEARCH**.

6. Click **SELECT** beside the name of the person you want to add.

User Already has Selected Role with another Org Unit Add [Role] Warning

7. Select the **YES** to allow this person to hold the same role for multiple Org Units and then click **CONFIRM**. Otherwise, click **CANCEL**.

8. **CONFIRM** your changes. You return to the Edit Org Unit page and the newly assigned user appears in the role you changed.

9. Click **SAVE** and then click **RETURN TO ADMIN ORG UNITS LIST**.

Select Replace Current "org unit member".

Deleting an Org Unit Role in FDM

Deleting an org unit role simply removes their association to a selected Org Unit. Once deleted, the screen will show a "vacancy" for that Org Unit and the next level up role in the "acting" position until someone else is assigned to that role.

1. On the Org Units page, click **EDIT** beside the appropriate Org Unit

2. Click **CHANGE** beside the role you wish to delete.

3. Select **REMOVE THE CURRENT (ROLE) WITHOUT ASSIGNING A REPLACEMENT** and then click **CONTINUE**.

4. Click **OK**. The user with the same role at the superior Org Unit now becomes the acting FDM role for that Org Unit.

Select the current POC withough assigning a replacement.

MOVING AN ORG UNIT

My Info My Reviews Admin Ethics Training Management Reports Resources Log Out

Filers POCs Supervisors Senior Legal Counsels DAEOs 450 Certifiers Users Org Units

DAEO [Change] ? How Do I...

Org Unit: My Orgs » Confidential Filers

Org Unit Search
Name: [] Search Clear

1 to 5 of 5 Items per page: 100 1

Org Units for Confidential Filers

Add New Org Unit

Name	Description	Location	Supervisor Name	
Central North	Central North	... » Confidential Filers	Tuesday, Ruby X	Edit Move Delete
Mid West Region	Mid West Region	... » Confidential Filers	Not Assigned (Supervisor, TrainingFDM, acting)	Edit Move Delete

Click Move.

Click **MOVE** to move the org unit and all filers in that org unit simultaneously to a new location in FDM. Selected user roles may only move org units to another FDM location within their authority. Contact the FDM Help Desk if the desired new org unit location is not available.

Note: Keep in mind that moving an Org Unit may change the review chain of the Filers located in that Org Unit.

1. On the Org Units page, click **MOVE** beside the Org Unit who is now reporting in to a different department.

Note: You may need to drill down or click the down arrow beside the appropriate Org Unit.

2. Click **SELECT** beside the Org Unit, which will be the new superior Org Unit.
3. Click **OK** to confirm 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. Choose from the list of legal reviewers that is displayed in FDM. Look closely at the options.

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 review chain.
5. Click **CONFIRM** when complete.

ews Admin Ethics Training Management Reports Resources Log Out

Supervisors Senior Legal Counsels DAEOs 450 Certifiers Agency Admins Users Org Units

Move Org Unit - Mid West Region ? How Do I...

» Demo Agency » Confidential Filers

Org Unit Search
Name: [] Search Clear

Items per page: 100 1

Org Units for Confidential Filers

Description	Location	Supervisor Name	
Central North	... » Confidential Filers	Tuesday, Ruby X	Select
Mid West Region	... » Confidential Filers	Not Assigned (Supervisor, TrainingFDM, acting)	Select

Click Select.

DELETING AN ORG UNIT

Click **DELETE** to remove an unneeded Org Unit.

Important Information

Before you can delete an Org Unit, move any associated Filers to another Org Unit or remove the Filer's role if they are no longer Filers. See the [My Filers](#) card for further information. If the Org Unit has subordinate Org Units, move or delete the sub-Org Units.

1. To check if any Filers are located in this Org Unit, click on the description link and then click **SHOW FILERS**.
2. Close the Org Unit Profile and then on the Org Units page, click **DELETE** beside the Org Unit that no longer exists.
3. Click **OK** to the message confirming the deletion.

Org Unit: My Orgs » Confidential Filers » Central North

Org Unit Search
Name: [] Search Clear

1 to 6 of 6 Items per page: 100 1

Org Units for Central North

Add New Org Unit

Name	Description	Location	Supervisor Name	
Central North 1	Central North 1	... » Central North	Dave, Holly X	Edit Move Delete
Central North 2	Central North 2	... » Central North	Not Assigned (Supervisor, TrainingFDM, acting)	Edit Move Delete
Central North 3	Central North 3	... » Central North	Not Assigned (Supervisor, TrainingFDM, acting)	Edit Move Delete
Central North 4	Central North 4	... » Central North	Knight, Wednesday X	Edit Move Delete
Central North 5	Central North 5	... » Central North	Day, Summer X	Edit Move Delete

Click OK.

Windows Internet Explorer
Are you sure you want to delete Org Unit North Central Region? Click OK for yes, Cancel for no.

OK Cancel