Financial Disclosure Report Instructions

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* FDR System Web Link *

To access your FDR use the following link: https://webapp1.sanantonio.gov/fdr/

The website page will open to:

* Logging on to the FDR System *

1. **Board Members:**
   - Select “Assigned Logon Id”
     - Contact your board liaison to obtain your logon ID
   - **Logon ID:** enter Assigned Logon ID
   - **Password:** pass1
   - Select: “Login”
   - Error Message: “Invalid LogonId or Password” contact your board liaison or the Office of the City Clerk

2. **Change Password**
   - **Current Password:** pass1
   - **New Password:** enter five characters or more (No special characters)
   - **Retype New Password:** (re-enter new password)
   - Select: “Change Password”
3. 

Change Password.
Password successfully changed.

- Select: “Continue”

4. 

- Select **File a New Report**
- Select current Report “Official20_ _”

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**FDR OPTIONS:**

- Home
- Logoff

Welcome Holly Hock

If you are not Holly Hock click [here](#)

Your current due date is: 10/31/20XX

<table>
<thead>
<tr>
<th>View Report</th>
<th>Finalized Date</th>
<th>Type</th>
<th>Attach</th>
<th>Amend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official20XX</td>
<td></td>
<td>Official</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Official2012</td>
<td>2/14/2013</td>
<td>Official</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amendment2011</td>
<td>2/11/2011</td>
<td>Amendment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Select most current Report from List “Official20_ _”

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5. 

Period of Report: Previous Year

Note:
The reporting period is for the previous year:
Example: Official2013 form will read as follows:
From January 1, 2012 To December 31, 2012
* Invalid Logon Id or Password Message *

- Error Message received:
  - “Invalid LogonId or Password
- Solution:
  - Contact the Office of the City Clerk or your Board Liaison (your information will have to be reset in the FDR System)

* Forgot Password *

1. Select “Forgot Password”

- Select “Forgot Password”
- UserID: enter your Logon ID
- Select
- An email with your new password will be sent from “FDR@sanantonio.gov” to the email address on file

Note: An email will also be sent to your Board Liaison notifying them you requested a new password
* Pop-Up Blockers *

Before you logon to the FDR System check to see if your computer has the “Pop-up Blocker” turned on:

If your “Pop-up Blockers” are on you may have problems logging on to the FDR System or opening your Report. See Option 5 for Mac Computers and Chrome Browser users.

Option 1:

- Click on the bar with the message and select Always Allow Pop-ups from the drop down menu

![Screenshot of pop-up blocking message]

Option 2:

- Open Internet Explorer
- Select Tools on the Menu Bar
- Select Pop-up Blocker from the drop down list
- Select Turn Off Pop-up Blocker from the side list

![Screenshot of Internet Explorer settings]
Option 3:

- Open Internet Explorer
- Select Tools on the Menu Bar

Select Pop-up Blocker from the drop down list
Select Pop-up Blocker Settings from the side list

- Enter https://webapps.sanantonio.gov/fdr/ in Address of website to allow
- Select the “Add” button
- Web Address will move to the box below titled “Allow Sites”
- Check off both boxes under “Show Notifications and blocking level:”
- Select the Close button
Option 4:

- Open Internet Explorer
- Select Tools on the Menu Bar
- Select Compatibility View Settings from the drop down list

- Make sure compatibility view was turned on for all websites
- Make sure both boxes have check marks as shown are checked

Tools → Internet options → Advanced → Browsing → Check the checkbox – Automatically recover page layout errors with compatibility view.
Option 5:

For MAC users:

*Safari:*
- Choose Safari > Preferences, then click Security
- In the “Web content” and “Internet plug-ins” sections, select “Un-Block pop-up windows,” then select Enable JavaScript, Allow plug-ins, or both

*Chrome:*
- Choose Chrome > Preference, then click Advanced Settings
- Under Privacy, select Content Settings, then select Pop-ups, Manage Exceptions
- Enter https://webapp1.sanantonio.gov/fdr and Allow

* How to Navigate through the FDR System *

<table>
<thead>
<tr>
<th>FDR Options:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
</tr>
<tr>
<td>Logoff</td>
</tr>
<tr>
<td><strong>Page 1</strong></td>
</tr>
<tr>
<td>Page 2</td>
</tr>
<tr>
<td>Page 3</td>
</tr>
<tr>
<td>Page 4</td>
</tr>
<tr>
<td>Finalize</td>
</tr>
<tr>
<td>Attachments</td>
</tr>
</tbody>
</table>

FDR Options:
- Select **Home**:
  - This option will take you to the Welcome Page
- Select **Logoff**
  - This option will exit you from the FDR System
- Select **Page** number from the list
  - This option will take you to the page number you select
- Select **Finalize**
  - This option will take you to the last page where you will:
    - Complete the Public Disclosure Information Statement
    - Consent for Public Information Statement
    - Complete the Oath
    - Enter your Electronic Signature
    - Submit your finalized report

- Select **Attachments**
  - To add, remove, or view an attachment

OR

Select **Next** or **Previous** at bottom of each page to move forward or return to prior page
* Entering Information in Cells *

1. Pre-Populated with:
   - Official Title:
   - Job Class/Department:
   - Board/Commission:

2. Pre-Populated with:
   - Last Name
   - First Name
   - Middle Name
   - Suffix

First Question on the report you will answer is Letter B:

3. Enter answer in cell (ex. “HEB”)  
4. Select [ADD/SAVE]

Proceed to the next question unless you have another entry for this question

- Answer will appear below the question (see below)
Entering more than one answer for the same question:

5. Enter information in cell if need and select [ADD/SAVE]
6. Your answer will appear above the first entry (see below)

Follow the same process if needed to enter more entries for the same question

*** Complete all fields: Enter “N/A” in each cell if you have no information to disclose (some questions require multiple answers)***

* Editing Information in Cells *

To EDIT an answer:

1. Select [EDIT] by the answer you wish to make changes to
2. Your answer will appear in the cell
   o Item in blue is the answer you are editing

3. Edit your answer in the cell
4. Select UPDATE/SAVE

5. The following will appear as your answer:
   • Review information entered, if correct move on to the next question
   • If new entry is wrong, repeat the EDIT steps above
* Deleting an Answer *

To DELETE an answer:

1. Select DELETE by the answer you want to remove

2. Select OK in the Message window

3. The following will appear as your answer:
How to add an Attachment

1. Select “Attachments” from the FDR Options

2. Select Browse... to select the file you want to attach

3. File Description: type a description of file you are attaching

4. Select Upload
5. Following message will appear: “Attachment Uploaded Successfully”
   a. To delete the attachment select “Delete”
   b. To edit the attachment select “Edit”

6. Select **Exit** to return to form

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**Finalizing your FDR**

1. Indicate by selecting the appropriate circle, if you would like for the public to have access to your personal information.
   - Your personal information will be redacted if an Open Records Request is received requesting your FDR

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**Public Disclosure of Information**

The Texas Public Information Act provides that each government official may choose whether to allow the public access to the information in the custody of the City that contains your home address, home telephone number, or reveals whether you have family members. Please note that this does not apply to business addresses, which are subject to public disclosure. If an open records request is filed requesting to view or obtain records that contain your personal information, the City will take steps to protect your personal information as authorized by the Texas Public Information Act, but only if you have elected to protect personal information.

<table>
<thead>
<tr>
<th>I want the public to have access to my: (Please indicate)</th>
<th>Home Address</th>
<th>Home Telephone Number</th>
<th>Family Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>(Yes) (No)</em></td>
<td><em>(Yes) (No)</em></td>
<td><em>(Yes) (No)</em></td>
<td><em>(Yes) (No)</em></td>
</tr>
</tbody>
</table>
2. Consent to Release of Public Information
   - Select box indicating you have read the Consent for Release of Public Information statement

   ![Consent for Release of Public Information](image)

3. Oath
   - Select box indicating you have read the statement
   - Type in name
   - Date will pre-populate

   ![Oath](image)

4. Last step: Click on **Finalize Report**
   - If report was completed correctly, you will receive the following message:
     
     “Report Submitted Successfully”
   
   - If you receive an Error Message in red follow instructions titled “Error when Finalizing your FDR”
* Error when Finalizing your FDR *

- **Error Message:**

  1. An error message will appear in red indicating which Question(s) in the report have an error.

  2. Select a Question to correct the error.

  3. Use the “Previous” and “Next” buttons at the bottom of the page to navigate to the next page.

  4. Once all corrections are completed you will have to finalize your Report again. Follow steps titled “Finalizing your Report.”

  5. Repeat process if another error message appears.