

AIM Software Version 1.8 - Release Notice

Production Release Date: 03/13/2010

1.0 INTRODUCTION

The web application, Authorization, Issuance, and Maintenance (AIM), was established in 2005 to provide an electronic workflow management system. The system provides electronic forms specific to issuance and maintenance of purchase cards. AIM is a component of a set of applications called Purchase Card Online System (PCOLS). This document addresses changes included in AIM release 1.8.

2.0 SYSTEM CHANGES

2.1 Software Upgrades/System Maintenance

The following system maintenance change is included in this release.

2.1.1 Performance Enhancements (Change Request #1289)

Performance enhancements are being made to improve the speed of the login process as well as the loading of account lists on the Managing Account, Accounts in Progress, and Account Migration tabs.

2.2 New Functionality

2.2.1 Save CAC User Segment (Change Request # 1082)

The system will be modified to capture and store the DEERS segment associated with an AIM user. When a user logs on to AIM with their Common Access Card (CAC), the system will store the required information so that AIM will be able utilize the email address associated with the segment when sending task and notification emails to the user. This change will only affect users that have more than one CAC segment in DEERS (e.g., a Civilian employee that is also a Reservist). The user must make sure to logon to their role in AIM with the appropriate CAC.

2.2.2 Account Migration - Account Cancelled (Change Request # 1171)

The system will be modified so that if an account is in the account migration workflow process and a cancellation update is received via a US Bank batch file, the account migration workflow will be stopped. A notification email will be sent to the Agency/Organization Program Coordinator (A/OPC) when this update occurs. The account will have a migration status of "Cancelled" and will be available for viewing under the Account Migration tab; however, the users will not be able to take any action on the account. There is no need for a user to complete migration on an account that can never be used.

As a reminder, it is recommended that all US Bank V9 accounts be reviewed prior to initiating the Account Migration process. All Active and V9 accounts will be migrated to AIM. If you do not wish to have an account migrated to AIM, it needs to be updated to T9 in the US Bank system prior to starting the migration process.

2.2.3 Account Migration Workflow Changes (Change Request # 1287)

The system will be updated to reduce the steps in the account migration workflow. Based on user feedback, the Managing Account migration process will only include the A/OPC and the Resource Manager (RM) and the Cardholder Account migration process will only include the A/OPC and the Cardholder. The system will be modified to require the A/OPC to enter all required data. The following figures depict the modified Managing and Cardholder Account Migration workflow processes.

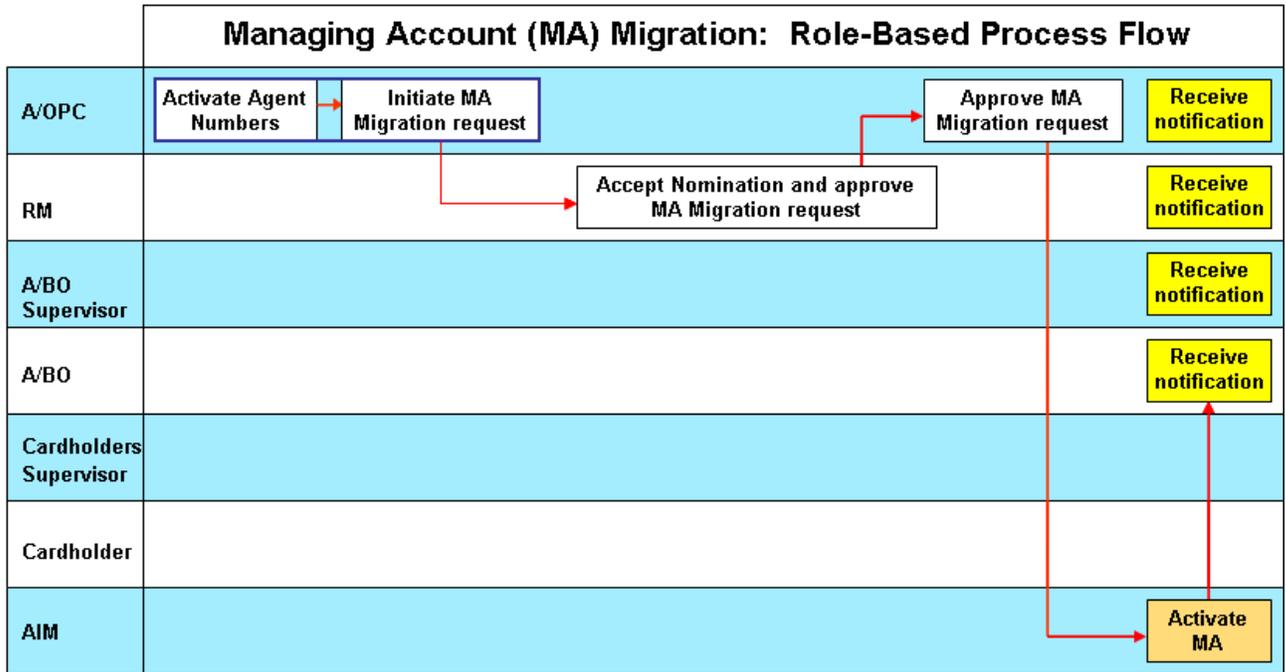


Figure 1 – Modified Managing Account Migration Workflow

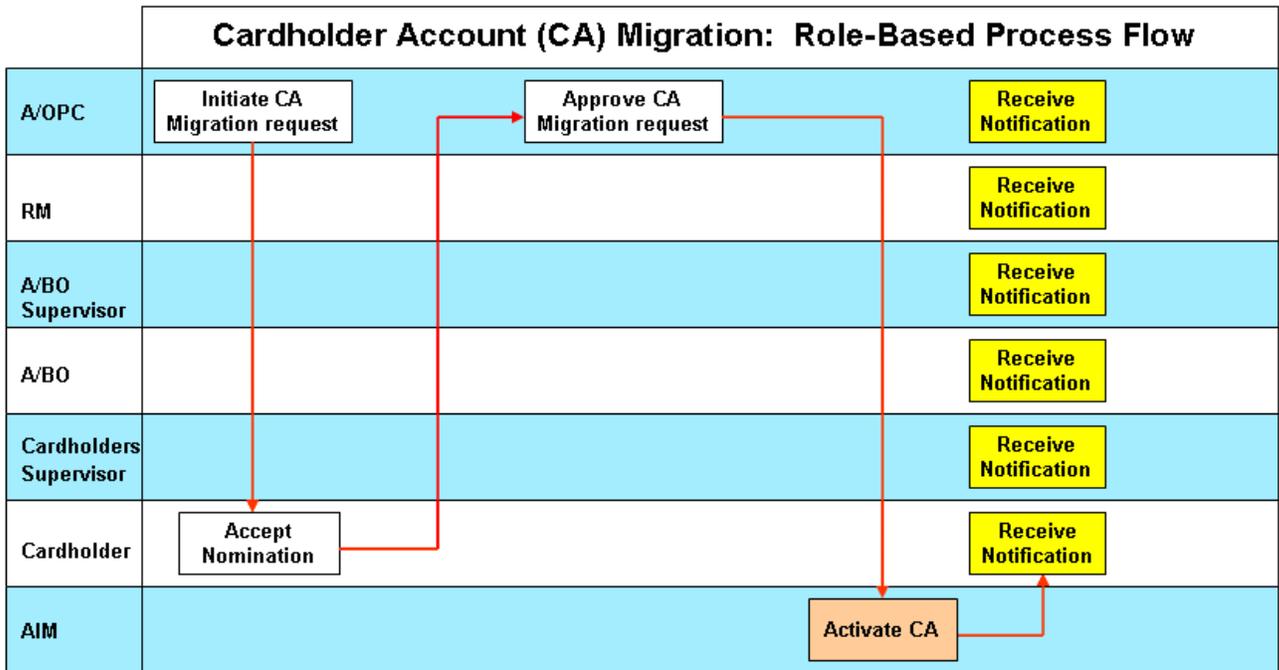


Figure 2 – Modified Cardholder Account Migration Workflow

2.2.4 Accept purchase limit of zero in USB batch processing (Change Request # 1295)

The system will be updated to handle a Single Purchase Limit and Cycle Limit of zero. The system will allow users to enter zero in the Single Purchase Limit and Cycle Purchase Limit fields, even though the fields are required. This change will ensure that AIM matches the validation performed by US Bank on these fields. In addition, the US Bank batch processing will be modified to populate the zeros in the fields when the value in the batch file is zeros. In the past, accounts were not migrated into AIM if these required fields did not have a value greater than zero.

2.2.5 Training Date Tab (Change Request # 1296)

The system will be modified to capture DAU Training dates for Alternate Approving/Billing Officials (A/BOs). The A/OPC will be required to provide the training date for each Alternate A/BO prior to submission. The "Training Dates" tab has been added for A/OPC's to maintain the dates.

2.2.6 System will remove spaces in the email address field (Change Request # 1299)

The system will be modified to automatically remove leading and trailing spaces from email addresses (RM and Cardholder) entered in AIM. When a user erroneously includes spaces at the beginning or end of an email address it is currently failing the address validation with an invalid email address error. The system will automatically remove the leading and trailing spaces before performing the validation of the address.

2.2.7 Allow US Bank Managing Accounts to be migrated without AVC (Change Request # 1310)

The system will be modified to allow US Bank accounts without an AVC Name to be migrated into AIM through the batch process. Account migration of Managing Accounts presently requires an AVC code. The batch process will be changed to accept Managing Accounts that do not have an AVC Name. If the AVC Name is not present, the AVC code will be set to 'NON-EDI DEFAULT.' Please note that this will allow existing accounts to be migrated from US Bank to AIM; however, any new accounts created through AIM will require a value in the AVC Name field.

2.3 Software Corrections

The following sections identify the software corrections being included in this release:

2.3.1 Update status after A/BO Reject (Change Request #1265)

The system will be modified to correct the request status displayed after an A/BO rejects a request for a new Managing Account. The status will be "Pending A/BO's Supervisor's revision."

2.3.2 Revision workflow for RM Pool Members (Change Request #1270)

The system will be modified to ensure that RM Pool members are being properly assigned tasks and emails when a request for a new account is returned for revision or sent to the pool by the RM.

2.3.3 Wrong email subject on organization update email (Change Request #1271)

The system will be modified to correct the subject of the email sent upon successful completion of an organization name update. The subject of the email will be: [PCOLS Notice] Organization Name Update success: Managing Account request.

2.3.4 Correct error assigning A/BO Supervisor after Supervisor is unprovisioned (Change Request #1285)

The system will be modified to correct the Update A/BO Supervisor function. Currently, the AOPC is receiving an error when trying to select a new A/BO Supervisor for a Managing Account if the existing A/BO Supervisor has been unprovisioned in EMMA.

2.3.5 Update CH Supervisor screen shows A/BO Supervisor list (Change Request #1298)

The system will be modified to correct the Update Cardholders Supervisor function. The screen for the A/OPC to update the Cardholders Supervisor will correctly display a list of provisioned Cardholders Supervisors.

2.3.6 Revision workflow for Cardholder Account Migration (Change Request #1317)

The system will be modified to prevent duplicate tasks from being created during the Cardholder Account Migration workflow.