

PCOLS Release Notice

AIM Release 4.02

Production Release Date: December 22, 2015

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 outlines the system change included in AIM Release 4.02.

2.0 System Changes

2.1 *Software Enhancement*

The following software enhancement will be included in the AIM 4.02 Release.

2.1.1 **Add Account Notes field to all accounts (Change Request #AIM-2099)**

At user request, a new field is being added to all accounts in PCOLS. This field will allow for the A/OPC to keep notes on the account. The notes field will be a text field that can be added by the A/OPC when the account is created in PCOLS or updated on any maintenance action. Other roles associated with the account will be able to view, but not update, the notes field.

Please note that an update to the notes field will replace the previous notes; the system will not maintain a history of the notes. At this time, the notes will only be available in PCOLS and will not flow to the bank.

2.1.2 **Allow AA to terminate workflow and resend appointment task email (Change Request #AIM-2084)**

The system will be enhanced to allow the Appointing Authority (AA) the ability to terminate an appointment workflow current assigned to an A/BO. In addition, the AA will have an option to resend the task email to the A/BO when the task is awaiting A/BO action. These functions will be available to the AA on the Appointments tab.

2.1.3 **Send Bank Failure task to appropriate user (Change Request #AIM-2078)**

AIM is being enhanced to direct the workflow task to the A/OPC or RM, as appropriate, after a failed attempt to send a request to the bank. For errors related to the financial information entered by the RM the task will be assigned to the RM for revision. All other errors will result in the task being assigned to the A/OPC.

2.1.4 **Include Inactive A/BO appointments on AA and AOPC Appointments tab (Change Request #AIM-2088)**

The Appointments tab will be modified to include appointments for all A/BOs including those that are no longer active in an A/BO position. This will allow the A/OPC and AA to view appointments for past A/BOs.

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2.2 Software Corrections

The following software corrections will be included in the AIM 4.01 Release.

2.2.1 Correctly handle long names when sending to bank (Change Request #AIM-2108)

The system will be modified to correctly handle last names of A/BOs and Cardholders that are longer than 23 characters. The system will be modified to match the name validation performed by the banks when creating account.

2.2.2 Fix GPC Training History (Change Request #AIM-2065, AIM-2095)

The training history will be modified to merge the tracking of GPC required training for individuals that are both A/BOs and Cardholders. This change will ensure that the training will be correctly displayed under both roles.

2.2.3 A/BO Revise button not enabled on Appointment task (Change Request #AIM-2083)

This correction will ensure that the reject button is initially enabled on the A/BO Appointment acceptance screen.

2.2.4 Date Reminder - Modify CH email address (Change Request #AIM-2039)

A correction will be made to ensure that the proper Cardholder email address is used for Training Reminder emails. The Training Reminder email will be sent to the email address associated with the CAC that was used to accept their Cardholder role in PCOLS.

2.2.5 Save as Draft is not working in CA creation AOPC role (Change Request #AIM-571)

The system will be corrected to ensure the Save As Draft feature works correctly for A/OPCs creating Cardholder Accounts. Previously, the system did not save the MCCGs correctly if all were removed from the account.