What’s New?

CitiDirect Card Management System 13.2

16 August 2013

Department of Defense Travel Card Program

The features in this release are only applicable to DoD Travel Card Clients.
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Release Overview

- The CitiDirect Card Management System (CCMS) 13.2 release will be implemented on Friday, August 16, 2013. This release includes enhanced features for cardholders, approving officials and AOPCs. The enhancements provided in this release were developed based on your input and are designed to help streamline card management tasks and achieve greater efficiencies. Please consult the CCMS Help documentation for a full explanation of these new features and functions.
Features Available to DoD Clients

Non Cardholder POC Look Up

- This new feature allows users to search for members of any group or Contact Type (not just Program Administrators) who are within their direct hierarchy / management chain
  - This enhancement is applicable to all clients who have Manage Contacts enabled
  - The feature is customizable by program administrators; they determine which Groups & Contact Types are searchable within the hierarchy, and they also determine the type of Point of Contact (POC) information that will be visible to users.

The User Group values listed here are the same ones that are listed in Manage Contacts, unless the list is restricted by your management.

The Contact Type values listed here are the same ones that are listed in Manage Contacts unless the list is restricted by your management.
- Configurations set at the highest management level will cascade to the subordinate hierarchy levels, unless the Program Administrator at the lower level makes a different configuration. For example (Note how selections cascade and are supplanted at subordinate hierarchies)

- Level 1 (Yellow) Display Selections
  - User Group: PAs, Final Approvers
  - Contact Types: N/A
  - POC Results: Name, Phone

- Level 5 C (Purple) Display Selections
  - User Group: PAs, All Approver types
  - Contact Types: Primary & Alternate PAs
  - POC Results: Name, Phone, Email

- Level 5 E (Blue)
  - Same as Level 5 C

- PA for the Level 6 C (Red)
  - User Group: PAs, Final Approvers
  - Contact Type: N/A
  - POC Results: Name, Phone

Program Administrators can reach out to the help desk for assistance in configuring the POC Results display fields. They can be set by:

- Click **Configure POC Search Options** under the **Assistance** Tab
- Use the drop down choices to select the appropriate configuration for:
  - **User Group**: the groups who will have the ability to use this new search functionality
  - **Contact Types**: the category of users who will have the ability to leverage this new search functionality
  - **POC Search Result Options**: the fields of information that will appear in the search results

- Once the POC Lookup fields have been configured, the user may preview the results by clicking on the **POC Lookup Preview** button.

**Example display:**
Default User Group Search Options for DOD Travel Clients

- If the AOPC does not manually configure the POC Lookup options, then the following user groups will be selected, by default, for Government clients
  
  - AOPC
  - AOPC-ADHOC
Display User Group and Contact Type Information

- Logged In Users now have the ability to see the entitlement group they belong to; this aids in mapping out the user’s functional abilities within the tool
  - Provides ability to quickly see what entitlement level the user has within CCMS
    - AOPC
    - Program Administrator
  - [NOTE: If the user is not mapped to a “Contact Type” then it will display “Undefined” (see example #2 below)]

Example #1

Updates to Help Documentation for CCMS Report

- Reports in the CCMS' Help Desk Indices will all be standardized
  - All help content related to reports will be organized and displayed under the index “R”
    - Naming Convention is: “Rpt” – {Report#}-{Name of Report}
      EXAMPLE: RPT-MBUC – Multiple Business Unit Contact Report
  - The benefit of this enhancement is that all the Reports will be listed in a consistent manner allowing users to locate their desired report efficiently
  - The report list will be displayed based on the user’s entitlement level. User will be able to see more details by clicking on their desired report
Paper Free Statements

- The Paperless Statement capability is now live for DoD Cardholders

- Modify and View the Account Screen
  - Each cardholder’s paper free status will be indicated on the **Modify/View Account Screen**, within the **Controls** section
  - When the user clicks on the detail button, they will be presented with a pop-up message that indicates their paper free settings
- **Paper Free Selections**
  - User will need to select yes if they would like to opt into Paper free statements
  - Once a choice has been made, the user will need to click **Continue**
  - If the user clicks the **Cancel** button, they will be sent back to the demographics or CIP screen, based on the appropriate workflow

- **Confirming User’s current email address**
  - Once users confirm that they would like to receive paper free statements, they will be asked to confirm their most current email address
  - The following text box will appear for the cardholder to validate or correct the desired email address where paper free statements will be sent
• Supervisor/AOPC Approval Screen Updates
  – The DoD Application Workflow screens have been modified to show Paper Free Information
  – The fields below will appear on the following screens:
    • On the Supervisor Approval Screen
      • Inbox → Application Approval Screen
      • Inbox → Account Status (View & Print Screen)
    • On the Card Application Workflow Screen
      • Inbox → Application Approval Screens

[NOTE: Users may click on the detail button to be presented with a pop-up log of Paper-Free settings.]