

Pre-Trip Approval (PTA) - FAQ

What is pre-trip approval (PTA)?

Pre-trip approval (PTA) is a process put into place to better manage business travel by allowing a trip to be approved or declined before it is ticketed. It offers an automatic method of controlling travel spending by designating *travel approvers* who can approve or deny a user's travel request.

The following are frequent terms used when describing the pre-trip approval process:

- *Primary approver*: User responsible for approving or declining trips triggered by the PTA process.
- *Secondary approver*: User identified to take action for trips triggering the process if the primary approver does not take action within the configured amount of time.
- *Expired Bookings*: Bookings which have not been approved or declined by the primary or secondary approvers within the configured amount of time. These are *not* automatically canceled unless you set up pre-trip approval to cancel declined itineraries. (You can decide whether or not to automatically cancel declined itineraries; see "Adding Custom Fields" in [Setting Up Pre-Trip Approval](#).)

How does PTA work?

Pre-trip approval works by auditing itineraries that include air, hotel, or car rentals. If an itinerary matches one of a number of criteria, it triggers the pre-trip approval process. You can add the JavaScript code for each criteria that can trigger the process, such as international flights, trips that don't include hotels, out-of-policy trips, and so on. The process sends an email to the user's designated Travel approver (or a secondary approver) for notification. The Travel user can provide a reason for the trip to include in the emails to approvers.

You can also configure the feature to not only send a notification email, but also enable travel approvers to approve or decline the trip before ticketing occurs by clicking the **Approve or Decline** link in the email that takes the approver to the Approve or Decline Trip page. Approvers can approve or decline the trip by email on a computer or mobile device.

Tip: You may want to reserve approve-decline emails for specific types of trips that need approval (such as international trips), and use notification-only emails for all other trips that fall out of policy for some reason.

How do I set up a user to be a travel approver?

As a site administrator, you can set a user to be a trip approver in the user profile by checking the Travel Approver Permission checkbox when editing a user under the **User** tab in the Partner Dashboard.

What global distribution (GDS) systems can be used with PTA?

Pre-trip approval works with the Sabre, Apollo, Galileo and Worldspan systems.

Are exceptions to the established rules handled by PTA?

Yes. As long as exceptions such as last minute travel have been defined, they can be handled.

What is the status of a booking during the PTA process?

The trip shows the following status on the Upcoming Reservation section of the Home page:

- *Waiting for Approval:* These bookings have not been approved or declined, and are within the configured amount of time for review.
- *Trip Declined:* These trips have been declined by the approver and have been canceled (if pre-trip approval is configured to cancel declined trips). Declined flights can be automatically canceled within 24 hours of purchase, and if the flight is declined within the 24 hour void window, the ticket cost can be fully refunded.
- *Canceled:* These trips have been canceled either manually or by the pre-trip approval process, if pre-trip approval has been configured to auto-cancel.
Note: Remember to manually cancel any expired trips if pre-trip approval is not configured to auto-cancel. Although the air ticket is not issued, the trip is not auto-canceled and could incur hotel penalties.
- *Pending Approval:* These trips have not been actioned within the configured period of time and are expired.
- *Confirmed:* Bookings which have been approved by primary or secondary approver and sent to ticketing.

How are Instant Purchase carriers handled?

- Instant Purchase carriers do not flow through the PTA process.

What is the notification-only PTA process?

- PTA can either trigger an approval process, in which an email is sent to the approver with the **Approve or Decline** link to approve or decline the trip, or it can send an email notifying an approver a trip has been scheduled, requiring no action.

Can a travel approver be a distribution list, or is an individual email address required?

- Approvers can be individuals or distribution lists. Simply add the email address where approver information is to be sent. You can decide whether to send the approval email to the email address in the approver's profile, or to a default approver email address defined in a PTA custom field. See "Adding Custom Fields" in [Setting Up Pre-Trip Approval](#) for details.

Can travel approvers be uploaded using a file?

- Yes. Travel approvers can be manually added to travelers' profiles, or the association can be set using the standard user upload file. See [Setting Up Pre-Trip Approval](#) for details.

Do all travel approvers need to be users in Deem Travel?

- No. If travel approval is defined at the custom field level with a default approver email address (see "Adding Custom Fields" in [Setting Up Pre-Trip Approval](#) for details), the approver's email address does not need to be for a profiled user. If travel approval is defined for a user profile, however, the travel approver for that user will need a Deem user profile.

What happens if the approver doesn't take action within the predefined period of time?

- If the primary approver doesn't take action within the predefined period of time, an email is sent to the secondary approver.

What happens if a secondary approver doesn't take action within the pre-defined period of time?

- If the secondary approver doesn't take action within the predefined period of time, the trip will show as "Expired" on the Upcoming Reservation section of the Home page, and will be canceled if you configure pre-trip approval to cancel tickets. You can decide whether or not to automatically cancel declined itineraries; see "Adding Custom Fields" in [Setting Up Pre-Trip Approval](#).

What information is included in the email to the approver?

- If you set up pre-trip approval to require approval, the approver receives a notification email with the **Approve or Decline** link that takes the approver to the Approve or Decline Trip page. The approver can then click the **Approve** or **Decline** button and enter a comment. If pre-trip approval is set up for notification only, the approver receives a notification email without the link.
- The subject line of the email contains the traveler's name and the trip name given to the trip by the traveler on the Purchase page. The body of the email provides additional trip information and messages you can configure for your site using a custom field (see "Adding Custom Fields" in [Setting Up Pre-Trip Approval](#) for details).

Where do I start my PTA configuration?

- Start the configuration on the Agency Settings page by enabling Pre-trip Approval and completing the configuration. Next, a custom field collection must be created with the custom field defined with the type "PTA". The collection must be associated with a rule and the changes must be committed. Additional configuration instructions can be found at [Setting Up Pre-trip Approval](#).

What is the PTA Process Flow?

- The PTA process flow begins when a user books and purchases flights, hotels and / or rental cars online or offline. The trip triggers a PTA rule and is flagged with pre-trip approval required. On the purchase page, the user will see the PTA rule messaging and will be given the option to include a note to the approver. If the user adds the optional note to approver and then selects purchase, the system will send out the approval email and put the trip in a pending approval state. The user will not be allowed to modify the trip until it is approved, however they can cancel the trip at any time. The trip will complete the fulfillment process after getting approved and both the traveler and approver will be notified of the completed action.

Can trips be approved online or via the mobile app as well as email?

- No, the only option at this time is to approve via email sent to the approver.

Does the Travel Agency have the ability to approve the reservation on the behalf of the Approver if they do not have the email?

- No, the Travel Agency does not have the ability to approve the reservation online in the Dashboard.

Will the user be able to determine the trip's progress through the PTA process?

- Yes. The Upcoming Reservations on the Homepage will indicate the itinerary status as it flows through the process. The trip will move from "Waiting for Approval" to either "Confirmed" or "Trip declined". If approval is not given in time, the trip will be marked "Expired".

Do I need to take action on "Expired" trips?

- Yes. The system will not auto-cancel an expired trip. The trip will flow to the defined PCC and queue. It is up to the site administrator to take action.

Where does the Site Administrator define the queues to use for PTA?

- The PTA enablement form contains fields for PCC and queues for each itinerary status: Approved, Declined and Expired.

How are multiple PTA rules handled?

- If a site is set up with multiple PTA rules, the system will evaluate each rule in the order defined in the PTA collection. The first rule to trigger PTA will define the specific pre-trip approval workflow. The trip is sent to the primary approver for approval.
- **Note:** The system will stop evaluating PTA rules once a given rule is triggered. It is recommended that you order the PTA rules in the collection from most important to least important. For example, a PTA rule for trips that exceed \$10K in total cost should appear higher in order than a PTA rule for international trips.

Are sample PTA PNR scripts available?

- Yes. Several sample scripts will be provided during the implementation process.

Is there a new PNR field type?

- Yes. A new field type has been introduced for and is named "Pre-trip Approval". The new script will only trigger during the trip action phase of PTA workflow.

Are any reports provided for PTA?

- Yes. The following fields will be included in the standard Pre-trip Approval Report:
- Company ID, Company Name, Traveler First Name, Traveler Last Name, Record Locator, Department Code, Department Name, Division, Process ID, Creation Time, Delegate ID, Delegate First Name,

Delegate Last Name, Booking Origin, Current Approval State (status), Actioned By, Approved By, Primary Approver Email, Secondary Approver Email, and Rule Name

What are the options for denying?

- It books to get the price and 24 hour window to cancel without penalty
- **Is it a true 24 hours or at midnight of the next day?**
- Example: Deem has a total of 1-11 hours for primary to make a decision, and total of 1- 11hrs for secondary. If they picked 11 for each, that would be 22 hours from booking they have to make a decision until it expires.
- WHEN it expires, you can configure to have the reservation auto approve, auto cancel or just go to a queue to be worked?

Is it different for last minute travel within x days of travel?

- If the trip is set to begin during the sum of amount of time the primary and secondary have to approve, then it will auto approve. If it is an instant purchase ticket, it will auto approve. In rare cases, if someone books a very restrictive fare that needs to be ticketed that same day (within hours) it will auto approve.
- It is placed on hold and then when approved, it books it.
- Any risk of selling out while on hold and are there any guarantees?
- The PNR would have the same guidelines as would apply if a travel counselor had the reservation on hold in the GDS so unfortunately not – all fares are subject to change until ticketed.

When does the price change and are there any guarantees?

- The PNR would have the same guidelines as would apply if a travel counselor had the reservation on hold in the GDS so unfortunately not – all fares are subject to change until ticketed.
- **Note:** PTA process will not kick off on a PNR that is only held, it would apply only once the traveler has hit purchase