Deem Travel:
Partner Dashboard Training

Day One –

2017

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1   Partner Dashboard Overview

Welcome to Deem Travel Basic Dashboard Training.

Whether this is an introduction to the Partner Dashboard or it is a refresher, we are confident that needed information about the dashboard will be gathered during each section of this course.

As an Administrator or Reseller of the Deem Travel application, the basics of administering users, managing policy, understanding customization, reporting features and enabling additional long tail services will be learned. These have all been identified as areas of key customization after the template site has been configured for the successful site administrator.

Classes have been arranged in a logical consecutive flow and will be offered several times each year. The content and learning objectives for each session are designed to stand alone so if necessary, some of the sessions can be taken now and others can be attended during later series to complete the course, as time allows. We also offer session recordings that can be downloaded and listened to at a more convenient time.

In preparation for any of the online training sessions, please become familiar with the documentation required for each session.

We are glad you could join us!

2   Managing the Super Domain Tabs

A Deem Site Administrator is defined as any person outside of the Deem configuration team who is responsible for maintaining and updating a site or group of sites for the agency or Travel Management Company (TMC) they represent.

The purpose of this section is to define the configuration and maintenance tasks which are the responsibility of the Site Administrator, as well as what tasks should still come to Deem for completion.

2.1   The Sites Tab

On the Sites tab the Site Administrator can define a site template and clone sites using the template.

2.1.1   Post-Deployment Responsibilities for a Site Administrator

Once a site has been launched, the Site Administrator takes primary responsibility for maintaining their sites.

The activities involved in site maintenance include but are not limited to the following:

Template Identification and Site Cloning

Before a Site Administrator can clone a site, a template must be created and identified for this purpose. The template must be created by configuring a site from a blank shell with the assistance of the Deem team.

Note: The template should be created from a non-transacting site.

To Identify a Site as a Template Site

1. Access the Deem Travel Partner Dashboard using the dashboard User Name and Password. The **Sites | Overview** page is displayed.

2. Click the **Manage Site Templates** link found on the left side of the page.

3. The **Sites | Manage Site Templates** page is displayed. Select the site to highlight it in the **Available Sites** box and click the **Make Template** link to move the site from the left box into the right box making it available to use as a template when creating new sites.
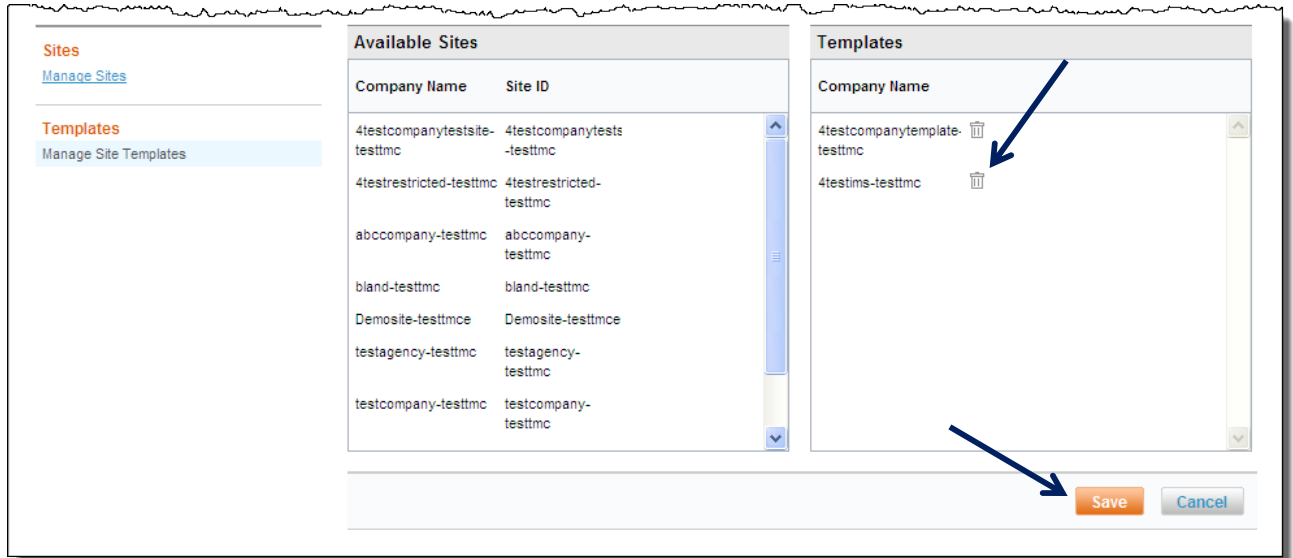
4. The site is moved to the right box and identified as a **Template**. Click the **Save** button to save the change. Click the trash can beside a site to remove the site from the templates drop down list.

To Clone a Site:

For site cloning, an administrator must have permission to access the Partner Dashboard on the dashboard and have a site identified as a template.

1. Access the Deem Travel Partner Dashboard using the dashboard User Name and Password. The **Sites | Overview** page is displayed.

2. Click the **Add a New Site** link found on the right side of the page.
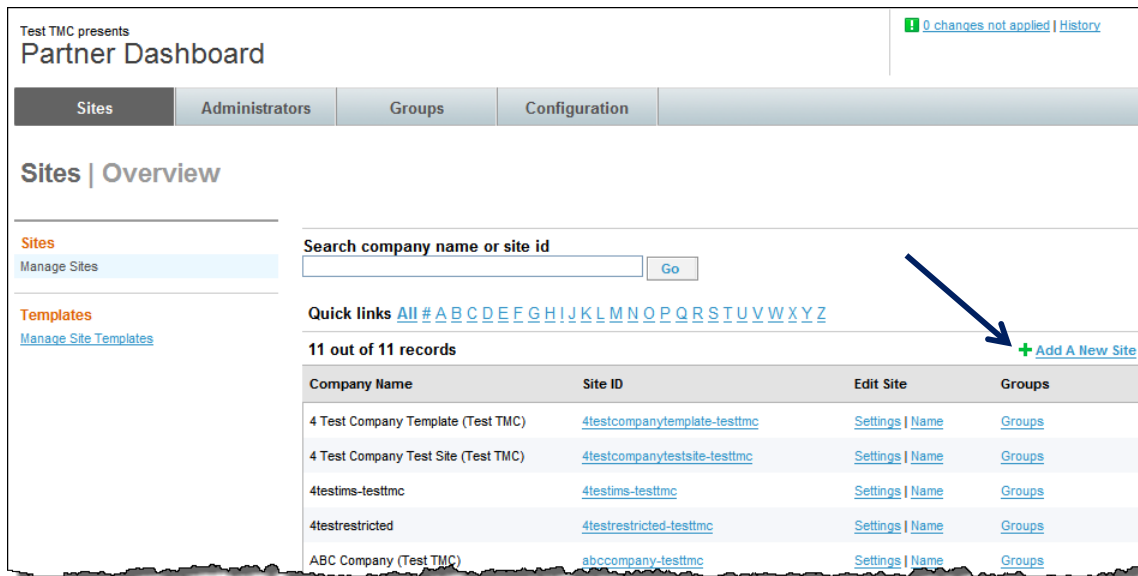
Note: The **Add a New Site** link will only become available with the appropriate site permissions. The **Sites | Domain Creation** page is displayed. Complete the form presented to create the new site without using the site template or clone a site by using the site template.

Note: The template configured during implementation is used most often to create a new site.

- **Domain & Company Details:** This section contains template to clone name, Company Name Site ID, Domain URL and other company specific information.

- **Contact & General Information:** This section contains the number of employees, Annual Air Spend, Contract Date, Industry, entity and usage type information.

- **Add an Admin Account (optional):** This section is no longer used.

- **Languages:** This section may appear, if the superdomain allows choice of language.

Complete the **Sites | Domain Creation** page:

- The **Domain & Company Details**:

  - ○ **Domain template to clone:** Click the drop down list and select the template to use for the creation of the new site / domain.

  - ○ **Company Name:** (Required) Enter the complete company name of the client. The naming convention should be the company name followed by, in parenthesis, the name of the super domain. Example: *4 Test Company Test Site (Test TMC)*

- o **Company External ID:** Enter the ID which can provide additional reporting. This field is not commonly used.

- o **Site ID:** (Required) Enter the new site name. The naming convention should be the new site name followed by a dash, then the super domain name removing any spaces. Example: *4testcompanytestsite-testtmc.*

- o **Domain URL:** (Required) Enter the site URL. The naming convention should be the new site name followed by a dash, then the super domain site name. Using the example the Site URL is: *4testcompanytestsite-testtmc.deem.com.*

IMPORTANT Note: The **Domain URL:** field is automatically populated based on the entry in **Site ID**. It is strongly recommended the Domain URL exactly match the site id. File uploads may be impacted if Domain URL and Site ID are not consistent.

Note: The **Your URL will be:** field is automatically populated based on the entry in **Domain URL**.

- o **Website URL:** Enter your company's URL. This is not commonly used.

- o **Phone number:** (Required) Enter the client phone number.

- o **Country:** (Required) Select the Country from the drop down list where the account is located.

Note: The Country selected will determine the address lines provided.

- o **Street Address 1:** (Required) Enter the first line of the client's address.

- o **Street Address 2:** Enter the second line of the client's address.

- o **City:** (Required) Enter the city of the client's address.

- o **State / Province:** Enter the state or province of the client's address.

- o **Postal code:** (Required) Enter the ZIP or postal code of the client's address.

- o **Currency:** (Required) Select the Currency from the drop down list for the client.

- o **Tier:** Select **ENT** from the drop down list.

- • The **Contact & General Information:**

Note: It is strongly suggested the site administrator complete this section with accurate estimations. These fields are used for analytics only.

- o **Feedback Email:** This address is displayed to the end user as an email address to which to send any Deem feedback.

- o **Number of Employees:** (Required) Enter an estimate of the total number of employees who may use Deem at this agency or company.

- o **Annual Air Spend:** Enter an estimate of the annual amount spent on air travel.
- o **Contract Date:** Select the date of the agency or company's contract. This is used for statistics only.
- o **Industry:** (Required) Select the company's industry from a list of 24 different industries found in the drop down list.
- o **Company Entity Type:** Select the company's entity type from the drop down list. Entries include Government, Private, and Public.
- o **Company Usage Type:** (Required) Select the company's usage type from the drop down list.

- Add an **Admin Account (Optional):**

Note: This section is no longer used.

- **Languages:** This section will appear if the superdomain allows language choice.

- o Select any 2 languages, indicating they will be available for selection to the end users.

3. Scroll down and click the **Save** button to save and create the new site

4. The **Domain Successfully Created** page is displayed. The new site can be accessed by clicking the site's URL.

5. To manage the settings for the new site click the **Click here to Manage the Settings** link. The **Partner Dashboard → Settings | Overview** page is displayed:

Test TMC presents

Partner Dashboard

⚠ 0 changes not applied

4 Test Company

| Settings | Users | Services | Groups | Rules | Reports | Profiles |

Settings | Overview

General Settings
Manage site's custom settings like Delegate settings, Support message etc.

Company Information
Capture the Company's Address and Contact Information used to profile the site and provide tips to optimize online spend program.

Groupware Servers
Integrate corporate Microsoft Exchange Servers, Lotus Notes/Domino Servers, Google Calendars and/or other web calendars with our platform. Helps improve user adoption. Recommended.

Email Settings
Setup Activation, Reminder and Password Reset Email templates for the Site.

FTP Servers
Setup FTP Accounts used for Bulk Profile updates. This activity needs IT assistance.

Open Enrollment
Enable End Users to self-onboard the site. Recommended.

Mobile Settings
Customize Mobile support info and upgrade reminder settings.

Password Security
Specify the password criteria for the site for example min 8 characters, enable remember me feature etc.

Home Page Options
Customize the message and additional resource links visible on the Home page.

Logo Image Upload
Upload the site's image. The logo is visible on the Application Header.

Privacy Policy Settings
Specify the Privacy Policy for the Site.

Profile Field Settings
Customize User profile settings. Specify which fields are mandatory, if the user can see and edit them etc.
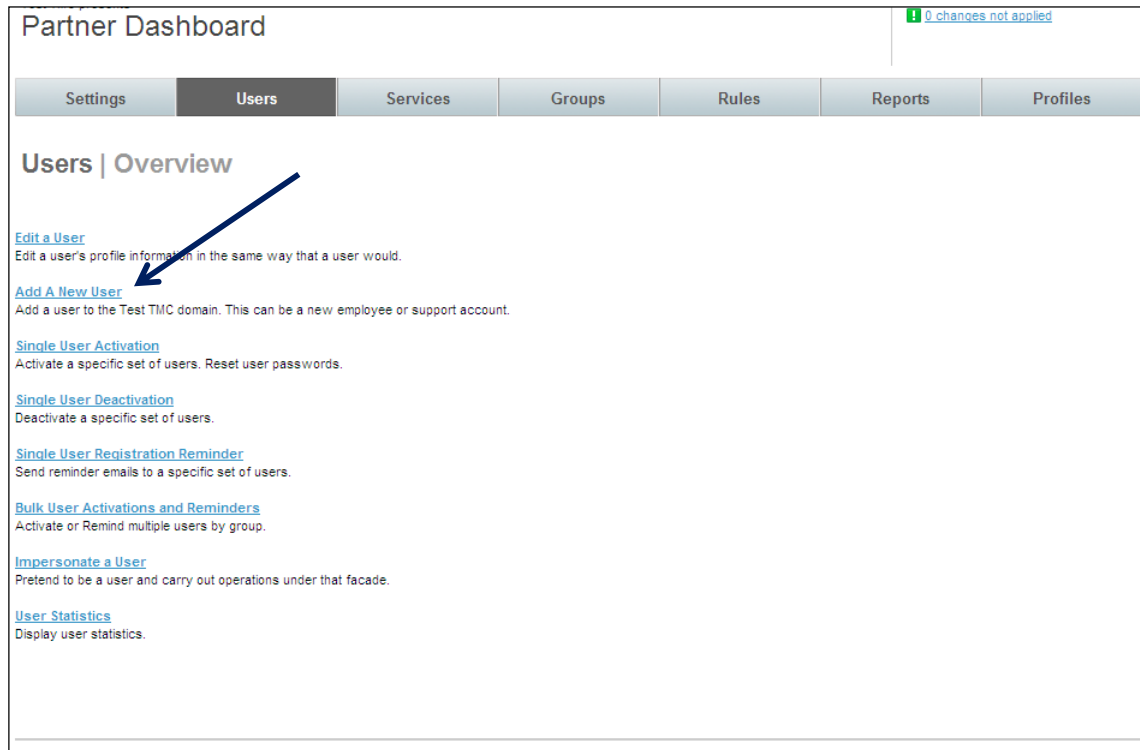
Web Services
Configure web service subscriptions for the site. This activity needs IT assistance.

Single Sign On
Integrate Company's intranet with the platform. It enables users to access this service through their intranet without having to remember a separate username and password. Recommended. This activity needs IT assistance.

Meeting Settings
Configure settings for enabling meeting integration for meeting attendees.

Cvent Meeting Settings
Configure settings for enabling Cvent meeting integration for meeting attendees.

Site Cloning Checklist

Clone a site using the Cloning Template. Once cloned, the site administrator will customize the site by following the *Site Cloning Checklist* below:

Settings Tab	
General Settings	**Home Page Options**
€ Add Launch date € Allow Delegation? € Allow Self Delegation? € Help Desk Contact Name & Method € Allow Importing / Exporting Contacts? € Spend Management Messaging	€ Home Page Messaging (Company News) € Resource Links (add new / remove duplicates)
Company Information	**Logo Image Upload**
€ Company Address € Contact Information € Additional Information	€ Company logo – 60h x 420w pixels max. GIF, PNG & JPG format only
	Password Security (if not SSO)
	€ Any company specific password security policy settings?
Groupware Servers	**Profile Field Settings**
Consumer Calendars (Google/Yahoo etc.) can be enabled for all users or a group of users. Customer enabling groupware integration? **If Yes:** € Has attended Deem training calls? € Has defined delegate username and password € Has updated all email accounts to allow the delegate user Define company groupware servers and delegate user name and password	€ Update field labels, data source (incl. if profile load should update ALL users or just new users), if fields should be displayed in profile and during registration, and if they are required € Customize Profile Fields to allow for unique reporting field requirements. I.e. Cost Center = 5 numeric € Rename and define "Misc" fields for display / reporting
Email Settings	**Web Services**
€ Update application URL for end user / administrator € Update "From" email display (NOT email ADDRESS!)	€ No action necessary on site level € On SUPERDOMAIN level, assign new site to a Superdomain web services subscription (max 50 sites per subscription).

€ Update Activation Email (if customized per client)	

FTP Servers	*Single Sign On*

If customer is providing an HR feed for mass enrollment instead of Open Enrollment, do you want to automate the file loads directly with Deem?
 	
If Yes:
 	
  €   Define SFTP server
	€ Enable / Disable
	
	If Enabled – Initially:
	
	  € Enter a Support Portal Case. Include names & emails of all individuals who should be sent a confirmation notification
	
	  € For Ping Adapter Requests - Use template provided by Deem
	
	  € Provide name in URL. Use site name up to .deem.com (Example: acme-yourtravel)
	
	  € Use address pre-filled on ping adapter request (support@deem.com)
	
	  € Copy your Activation Manager

Open Enrollment	*Mobile Settings*
€ Enable / Disable € Restrict access using Allowed Domains and / or Secret Key € Add Successful enrollment email notification address € Update Activation Email (if customized per client) Remember: Open Enrollment is NOT enabled when cloned from the template	€ Update Helpdesk Email / Phone, as applicable. € Click SAVE (even if no changes made) to enable mobile functionality

Services Tab	

Travel (Heading)	*Travel – Vendor Management*
€ Resource Links (add new / remove duplicates)	€ Client specific preferences for air / car / hotel

Travel - Agency Configuration	
€ Agency Settings - Pseudo City Code, Default Queue and PCC Sales Location € Agency Settings - TA Printer Address to Auto Void and/or Refund € Agency Settings – Ancillary Sources – verify Source configuration for adding passive segments to GDS and queues.	€ Agency Settings - PNR Synch enablement required only if different queues used from PNR Synch site or if PNR Synch site does not exist. € Agency Settings – Enter airline Negotiated Rate Code € Agency Settings – Verify Train Support identifiers and contact. The generic code can be used for sites without negotiated rates or site card. A new code

€ Agency Settings - Ancillary Sources – add/delete sources as necessary. € Agency Settings - Agency Information, incl. ARC/IATA and Time Zone € Agency Settings – enter client Domestic Definition € Agency Settings – PNR Synch - Owner ID (MUST match profile map! EX: SYNCHID vs. SYNCH ID)	must be requested for site card and / or negotiated rates by company. € Agency Settings – Review Pre-trip Approval settings € Custom PNR – Update first level star name for site € Custom PNR – Update/Add other specific scripts (queues, etc.) € Queue / Delivery Options – Conditions, PCC, etc. **Note:** If you are enabling TravelFusion for their Low Cost Carrier content, the request must be submitted to Deem Support as only Deem can enable this feature on your site.
Travel – Travel Policy Management	*Travel - Compliance Code Management*
€ Client specific flight, car and hotel policy € Policy messaging, behavior and queuing € Determine if multiple policies are required for separate groups of travelers (Default/VIP/Guest etc.)	€ Update codes for policy compliance
Travel – Private Rates	*Travel – Display Configuration*
€ Add / update Airlines Rates (if more than 1 rate code in agency settings),Car Rental CD numbers, hotel rate code for client € Add Train Discount Code and message € Verify room rates removed (AAA/AARP etc,) € Upload client hotel database	€ Alternate airports, search radius for air/hotel, etc € Override company name on disclaimer € Hotel Shopping Display – Use Tabs? € Page messaging € Determine if multiple displays are required for separate groups of travelers (Default/VIP/Guest etc.)
Travel – Reference Points	*Car Service / Airport Parking*
€ Download / update template then upload using good CSV procedure	€ Update configuration / policies as necessary € If negotiated rates, submit forms to Deem Car Service
Shipping	
€ Enable / Configure € Provide Account numbers	
Groups Tab	**Reports Tab**
€ Create new groups (VIP, etc.) € Create "Is A Traveler" Group for Profile Synch	€ Review Report schedules

€ Does a Guest Traveler (non-profiled traveler) group need to be added? See Guest Traveler training clip for complete instruction. **Note:** Do not use special characters or spaces in group names	
Profiles Tab	**Rules Tab**
€ Schedule HR file/profile loads if not Open Enrollment € If Unused Ticket Upload file is currently being submitted on the Superdomain, include users from this new site in the file (all tickets for all TMC customers should be uploaded via a single master file on the Superdomain vs. individual files per site).	€ Service Rules - Assign appropriate rules to user groups € Groupware Rules – verify Calendar Type (iCal, inline or Groupware) € Display Option Rules - Time Zone, etc € Web Services Rules – enable Profile Synch (profile pull) € Mobile Rules - Add / Activate for all users or a group.
Other	
€ Restricted Countries on Site or Superdomain level? € Identify new custom fields, if any € Add Site Payment Card (Ghost Card/BTA), if applicable. € Define Corporate Payment Cards. i.e. AX series 3878444 € Define Hotel Per Diems based on specific locations € Clone/Create new profile map in the Profile Synch Interface (ETSI) and update lines as necessary. € If new PCC, submit POS form for ITA	€ Ensure client has whitelisted all Deem email domains: deem.com us.deem.com us1.deem.com € Ensure client has unblocked the following URLs: deem.com rcobjs.com google-analytics.com main.rcmsg.com € Send Activation emails

Data File Management

A Site Administrator is responsible for maintaining a number of important database files necessary to ensure proper functionality of the site. The files are typically provided by Deem during the pre-deployment phase or are downloaded from the Deem Travel Partner Dashboard in the form of a data template as they are needed. Each data template includes instruction for formatting and uploading the file into the services dashboard.

These files include the following:

- **Profile Maps Template** – The template used to upload agency specific GDS profiles to ETSI – our partner for PNR Synchronization used to send PNR's to the agency GDS

- **User Profile Upload Template** – The template used to map uploads of users into the dashboard.

- **Delegate Association Upload Template** – The template used to upload the traveler / arranger association into the dashboard

- **Hotel Private Rate Database** – The template used to upload client preferred properties

- **Reference Point Database** – The template used to upload client locations for use during hotel and car shopping

- **Unused Tickets** – The template used to upload unused tickets into the database.

Once initial creation and upload of the data file has taken place, it is the responsibility of the Site Administrator to maintain these files. Based on the template type, each time a file is updated the administrator must either provide the file to the Deem configuration team at the secure server for upload to the appropriate site or process the upload using the Deem services dashboard themselves.

<u>Site Administrator:</u>

Initial User Profile Upload: The Site Administrator can process all initial User Profile uploads.

<u>Deem Team:</u>

Mass Updates to Existing Users: Any mass updates to existing users via the profile upload utility should be submitted to the Deem team for processing.

Profile Maps: Profile maps must always be submitted to the Deem team for processing.

Note: An Advanced User Data Management class is available to assist in the successful upload of data files into the dashboard. Contact Deem to learn when the next class is being offered.

IMPORTANT NOTES TO REMEMBER WHEN PROCESSING A DATA FILE:

<u>Use MS Excel with caution:</u> Although files may be initially provided during pre-deployment or by using the dashboard download in MS Excel format, it is important to save the file in CSV format once data updates are made. Do NOT use MS Excel to make future updates. MS Excel alters the format of the data making it invalid for upload into the services dashboard. The use of CSVed is recommended to manipulate the data. Free download of CSVed is available from websites such as Snapfile, PCWorld, or SoftPedia.

<u>Maintain a data repository:</u> It is the responsibility of the Site Administrator to maintain a historical repository for all files uploaded into the Services Dashboard. Deem is unable to extract files previously uploaded.

Other Key Settings

In addition to database file maintenance, a Site Administrator is also responsible for maintaining other key settings within the Deem services dashboard to ensure proper functionality of the sites they manage. These include:

Travel:

- Air Private Rates
- Car Private Rates
- Vendor Preferences (air, car, hotel)
- Site Charge Card(s)
- Corporate Charge Card Preferences / Restrictions
- Alternate Airports
- Policy Settings
- Compliance Codes
- Hotel Per Diems

- o   Custom Fields
- o   Restricted Countries
- o   ITA Rate Code Requests (and verification of completion)
- o   Travel Agency Configuration (queues, etc)
- o   Unused Ticket database upload

Car Service:

- o   Reference points
- o   Policy Settings
- o   Vendor Preferences

Airport Parking:

- o   Policy Settings

Conferencing:

- o   Complete vendor order form
- o   Notify Deem with contract information as accounts are activated by vendor

Shipping:

- o   Vendors
- o   Contacts
- o   Policy Settings
- o   Billing information (including account numbers)
- o   Service Options
- o   Rate Information
- o   Documentation Requirements
- o   International Requirements
- o   Endicia Account Setup (for US Postal Service)
- o   Notify Deem with contract information as accounts are activated by vendor(s)

Other Data Management Activities

Proper user data management is an essential part of the Site Administrator's responsibilities. However, there are additional activities that must be managed. These activities include:

- Testing and ongoing support of user creation and maintenance to include user password reset, reminder and activation email origination
- Providing user first level of support
- Setting up the User and Profile tab access
- Completing Profile Extracts (Extracts are typically used to create up-to-date profile upload files)
- Completing configuration of cloned sites

2.2 The Groups Tab

There are several areas in the dashboard where domain groups are used to define, grant, or limit access to services. These site groups are defined on the Groups tab.

2.2.1 Define a Group of Sites

To define Domain Groups:

1. Access the Deem Travel Partner Dashboard using a dashboard User Name and Password.

2. The **Sites | Overview** page is displayed. Select the **Groups** tab.
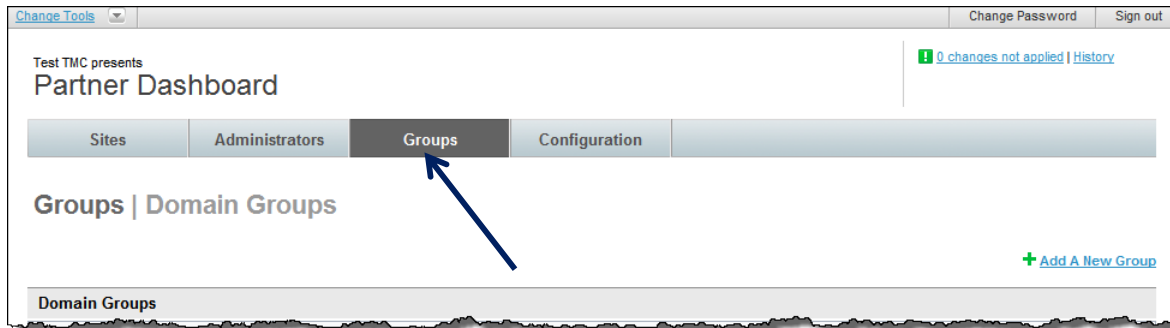
3. The **Groups | Domain Groups** page is displayed. Click the **Add A New Group** link.
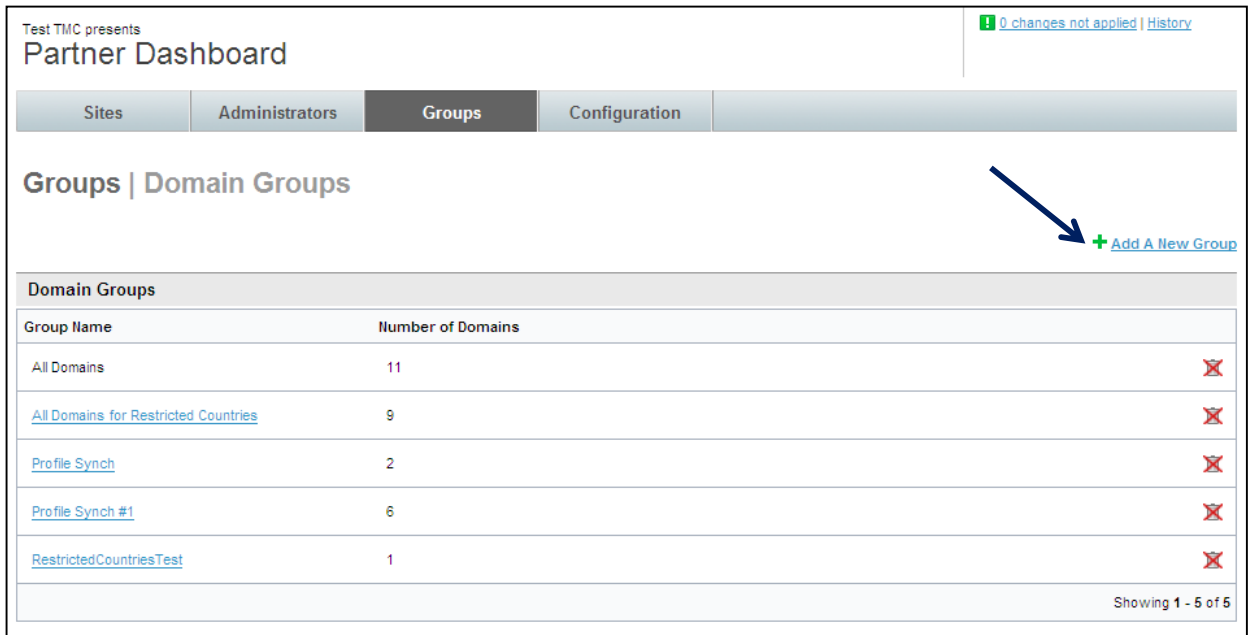
4. The **Groups | Add / Edit Domain Groups** page is displayed. Enter a **Domain Group Name** for the group

5. Click a site / domain name in the right box to highlight it and click the **Add** button to add it to the group and move it to the left box. More than one site can be selected by holding down the control key.

6. Once all the sites / domains have been added to the group, click the **Save** button to save changes. Commit changes.

2.2.2 Display Groups to Which a Site Belongs

1. To display the **Domain Groups** to which a site belongs:

2. Access the Deem Travel Partner Dashboard using a dashboard User Name and Password.

3. The **Sites | Overview** page is displayed. The list of sites includes a **Groups** column. Clicking the **Groups** link displays a list of groups to which this site belongs.

4. The **Group Name** popup box is displayed containing each of the groups to which this site belongs.
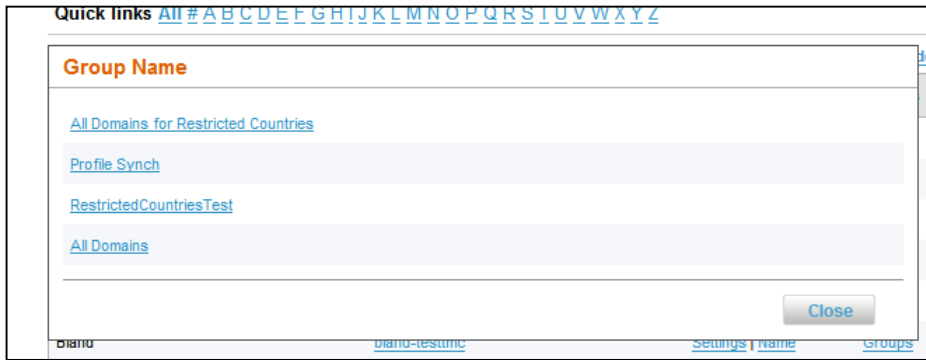
2.3 The Administrator Tab

There are several levels of access available to assign to an administrator of a site. These will be discussed in this section.

2.3.1 Manage Existing Administrators

To manage existing Dashboard Administrators:

1. Access the Deem Travel Partner Dashboard using a dashboard User Name and Password.

2. The **Sites | Overview** page is displayed. Select the **Administrators** tab.

3. The **Administrators | Overview** page is displayed. Enter **Search Criteria** to locate the Administrator.

- **User Name:** Enter the searched for Administrator's full or partial user name

- **First Name:** Enter the searched for Administrator's full or partial first name

- **Last Name:** Enter the searched for Administrator's full or partial last name

- **Email:** Enter the searched for Administrator's full or partial email address

- **Status:** Select the **All, Active** or **Not Active** radio button.

- **Super Domain Admin**: Select this checkbox if the searched for administrator is a Super Domain Administrator

- **Domain Admin:** Select this checkbox if the searched for administrator is a Domain Administrator

- **Domain Drop-down List:** Searches for the administrator can also be done by domain by clicking the domain drop down list.

- **Roles:** Click the drop down list to select the searched for administrator's role

4. Click the **Search** button. A list of Administrators meeting the search criteria is displayed.

Note: If fewer than 200 administrators exist, the search of all administrators can be done by entering no selection criteria and clicking the **Search** button.

Note: An Administrator cannot access their own profile.

Note: The sort order of the search results can be changed by clicking either the **Name** or **User Name** links at the top of the search results.

5. Click the **Name** link of the user to display an administrator's profile. The **Administrators | Edit Administrator** page of the selected user is displayed.

2.3.1.1 Change the Password for a Partner Dashboard Administrator

To change the Partner Dashboard password for an existing Administrator:

1. Access the Deem Travel Partner Dashboard using a dashboard User Name and Password.

2. The **Sites | Overview** page is displayed. Select the Administrators tab.

3. The **Administrators | Overview** page is displayed. Enter **Search Criteria** to locate the Administrator.

-   **User Name:** Enter the searched for Administrator's full or partial user name

-   **First Name:** Enter the searched for Administrator's full or partial first name

-   **Last Name:** Enter the searched for Administrator's full or partial last name

-   **Email:** Enter the searched for Administrator's full or partial email address

-   **Super Domain Admin:** Select this checkbox if the searched for administrator is a Super Domain Administrator

-   **Domain Admin:** Select this checkbox if the searched for administrator is a Domain Administrator

-   **Domain Drop-down List:** Search for the administrator by site / domain by clicking the domain drop down list.

-   **Role:** Click the drop down list to select the searched for administrator's role

Note: If fewer than 200 administrators exist, display all administrators by entering no selection criteria.

4. Click the **Search** button. A list of Administrators meeting the search criteria is displayed.

5. Click the **Change Password** link of the user to change their password. The **Administrators | Change Password** page is displayed.

6. Clear the fields, enter and confirm the new password.

7. Click **Save** to save the new password.

Note: The password may not contain the user name, user first name, or user last name. It may also not include a common word or name and must include at least one numeric character. An acceptable password would be p8ssw0rd, but not passw0rd because "pass" is a common word.

8. The **Administrator's Partner Dashboard** password was changed.

2.3.1.2   Deactivate Partner Dashboard Access of an Administrator

Deactivation of a Dashboard Administrator is the preferred method of removing access to the Dashboard. It provides a method of viewing what access was available to the administrator.

To deactivate Partner Dashboard access of an Administrator:

1. Access the Deem Travel Partner Dashboard using a dashboard User Name and Password.
2. The **Sites | Overview** page is displayed. Select the **Administrators** tab.
3. The **Administrators | Overview** page is displayed. Enter **Search Criteria** to locate the Administrator.

   - **User Name:** Enter the searched for Administrator's full or partial user name
   - **First Name:** Enter the searched for Administrator's full or partial first name
   - **Last Name:** Enter the searched for Administrator's full or partial last name
   - **Email:** Enter the searched for Administrator's full or partial email address
   - **Super Domain Admin:** Select this checkbox if the searched for administrator is a Super Domain Administrator
   - **Domain Admin:** Select this checkbox if the searched for administrator is a Domain Administrator
   - **Domain Drop-down List:** Search for the administrator by site / domain by clicking the drop down list.
   - **Role:** Click the drop down list to select the searched for administrator's role

Note: If fewer than 200 administrators exist, display all administrators by entering no selection criteria.

4. Click the **Search** button. A list of Administrators meeting the search criteria is displayed.

Note: The sort order of the search results can be changed by clicking either the **Name** or **User Name** links at the top of the search results.

5. Click the **Name** link of the administrator to open their profile.

6. The **Administrators | Edit Administrator** page is displayed. Deselect the **Is Active** checkbox of the user to be inactivated. Confirm the action by clicking the **OK** button.

7. Scroll down and click the **Save** button.

2.3.1.3   Delete Partner Dashboard Access of an Administrator

To delete Partner Dashboard access of an Administrator:

1. Access the Deem Travel Partner Dashboard using a dashboard **User Name** and **Password**.

2. The **Sites | Overview** page is displayed. Select the **Administrators** tab.

3. The **Administrators | Overview** page is displayed. Enter **Search Criteria** to locate the Administrator.

- **User Name:** Enter the searched for Administrator's full or partial user name

- **First Name:** Enter the searched for Administrator's full or partial first name

- **Last Name:** Enter the searched for Administrator's full or partial last name

- **Email:** Enter the searched for Administrator's full or partial email address

- **Super Domain Admin:** Select this checkbox if the searched for administrator is a Super Domain Administrator

- **Domain Admin:** Select this checkbox if the searched for administrator is a Domain Administrator

- **Domain Drop-down List:** Search for the administrator by site / domain by clicking the drop down list.

- **Role:** Click the drop down list to select the searched for administrator's role

Note: If fewer than 200 administrators exist, display all administrators by entering no selection criteria.

4. Click the **Search** button. A list of Administrators meeting the search criteria is displayed.

Note: The sort order of the search results can be changed by clicking either the **Name** or **User Name** links at the top of the search results.

5. Click the **Delete** link of the user to be deleted. Confirm the deletion by clicking the **OK** button.

3 Managing the Site Tabs

The Partner Dashboard at the site level is made up of several tabs. These tabs include the Settings, Users, Services, Groups, Rules, Reports and Profiles tabs of which all but the Profiles tab will be covered in these classes. The Profiles tab is covered in the Advanced User Data class.

Once a site is added or cloned, additional maintenance may be needed to ready the site for users. One task is the on-boarding of users.

3.1 The Users Tab

The Users tab allows a site administrator to add and edit users, to activate and deactivate users, to send single or bulk activations and reminder emails, impersonate a user and view user statistics. All of the functions are governed by the privileges given to the administrator.

3.1.1 Methods of On-boarding Users

With the Users tab privileges a site administrator maintains Deem end-users' profiles.

Method	How are accounts created?	How is the data populated?	Password?
Open Enrollment	Users create their own account from the login page. Access is restricted by email domain name	All data is entered by user	Created by user during enrollment process

deem.com

	or a specific security code (Secret Key).		
Manual creation	Dashboard Admin with Users Tab access manually adds new users	Available data added by dashboard admin, remainder added by user.	Randomly generated if activation emails are triggered. Pre-defined if activation emails are not used.
HR Feed	Initial and/or ongoing client HR feed is uploaded manually or via an SFTP process.	Most data existing in the client's HR database can be uploaded. Non-HR data (usually travel related preferences, conferencing numbers etc.) is added by user. File must meet the Deem User Database Template specifications.	Same as Manual Creation
Agency Upload	Agency uploads initial user database file created from an extract from another tool or GDS profiles. Subsequent new accounts created by HR feed, open enrollment or dashboard creation	Any data available to the agency can be uploaded. File must meet the Deem User Database Template specifications.	Same as Manual Creation
Provisioning via SSO	Users are created and activated in our database when they access the Deem via SSO for the first time	Pre-defined user data is passed from agency or client portal via SSO when user accesses the Deem via this method.	NA - access via SSO from other portal

3.1.2 Add a User

To add a user manually to the Deem Travel Partner Dashboard:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Add a New User** link to add a new user to Deem.

5. The **Users | Add A User** page is displayed. Complete the **Account Information**.

- **Support Account:** If checked, this user will not appear in the reporting for the site and will not be overridden by a profile upload. A support account is usually a site administrator or someone who will perform testing or QA on a site and not be a traveler.

- **User Name:** (Required) Enter the new user's user name. This name must be unique to the site and will be used to access Deem. It is often times the user's first initial and last name.
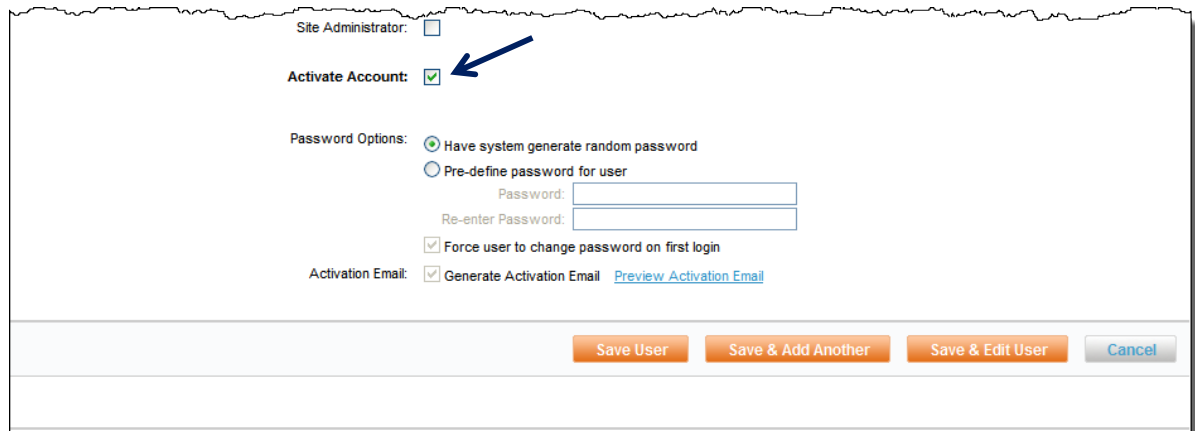
Note: It is important for the format of the User Name to be consistent across the site.

- **External ID:** (Required) Enter the new user's External ID. This ID must be unique and will be used in many areas of the tool. The External ID many times is the employee number of the user.

Best practice is to NOT use the email address because of the chance that it will change over time.

- **Email:** (Required) Enter the new user's email address.

- **Groupware ID:** Enter the new user's Groupware ID. This will default to the user's email address that was entered above.

- **Title:** Select the new user's title from the drop down list.

- **First Name:** (Required) Enter the new user's first name.

- **Middle Name:** Enter the new user's middle name.

- **Last Name:** (Required) Enter the new user's last name.

Note: It is important for the First, Middle and Last Name to agree with the government issued documents that will be presented at the airport for check in.

6. Select the **Site Administrator** checkbox if this end user is to have access to the **Insights Dashboard** and has access as an **Expense Administrator**.

Note: The **Insights Dashboard** is an online, at-a-glance tool that allows companies to **monitor and manage spending** for multiple service categories, aggregating data in real time.   Companies can review data on **adoption rates, transaction metrics, and spending trends** to make immediate policy adjustments to maximize cost savings. In addition, travel management companies (TMC's) who use the Deem platform can use the Insights Dashboard to monitor each of their customers' trends and make change recommendations to yield future savings.

a. **Insights Dashboard** is accessed by clicking either the **Site ID** link on the **Sites | Overview** page:

b. Or by clicking the **Site ID** link from the **Change Site** list.

c. The **Insights page** is divided into four tabs; the Spending, Service Analysis, Service Activity and User Activity.

Spending: This page shows the statistics about a company's spending.

Spend	Transactions		Select dates: December 2008
	Airport Parking	22.60%	(4845)
	Car Service	4.20%	(896)
	Dining	2.90%	(614)
	Flights	45.80%	(9829)
	Hotel	21.80%	(4679)
	Package Shipment	0.00%	(0)
	Rental Car	2.90%	(621)
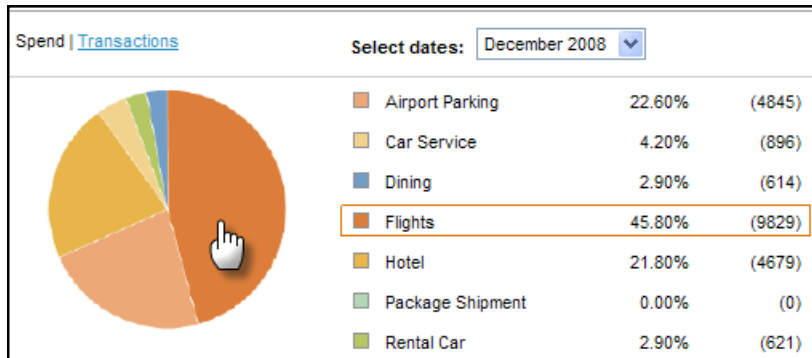
Service Analysis: This page shows how often employees are using the application. View **All** transactions, or view statistics by each service enabled on the site. (Airport Parking or Car Service, for example)
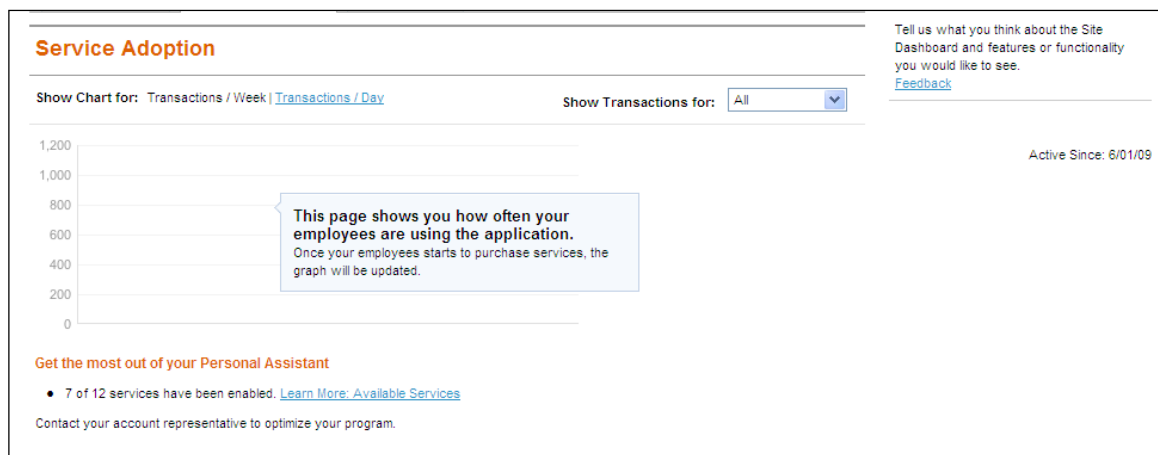
Service Activity: This page shows how often employees are using the application. View **All** transactions, or view statistics by each service enabled on the site. (Airport Parking or Car Service, for example)
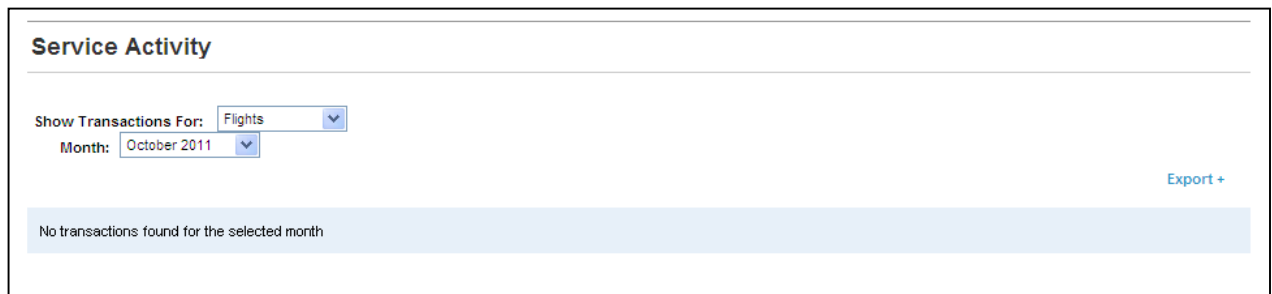
User Activity: This page shows adoption statistics showing **Unique Logins Per Day**.
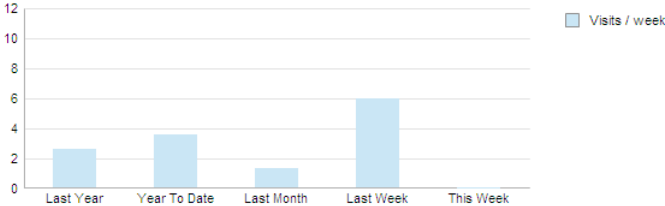
User Activity: This page shows adoption statistics showing **Visits Per Week**.

d. Click the **What is Peer Benchmarking** link to view how Peer Benchmarking is defined in the **Insights Dashboard**.

Peer Benchmark

What is Peer Benchmarking?
Peer Benchmarking allows site administrators to gauge their site performance by comparing it to other similar organizations who have had success reducing spend using our application.

After you provide us with information about your organization, we will place you in a peer group based on several criteria, including Industry, Number of Employees, and Annual Spend. You can then measure your site performance against your peer group to better understand your data. You can also use their best practices as a guide to optimize adoption and increase savings. Peer groups are broken down as follows:

Peer Group	Number of Employees
Small	1-99
Medium	100-499
Large	500-2499
Enterprise	2500+

What if I am below my Peer Benchmarks?
There could be many reasons your data is below your Peer Benchmarks. The most common reasons are:

- Users are not aware of the advantages of the application.
- Users have not registered yet.
- You have not enabled all the stores used by organizations in your peer group.

Also, your employees might be booking services offline or using suppliers that are not preferred by your organization. If this happens:

- You cannot measure, monitor and manage usage trends effectively.
- Company policies cannot be enforced at the point of purchase.
- Your organization is missing opportunities to lower costs and increase productivity.

Contact your account representative for more information about Peer Benchmarks.

Close

e. Click the **Learn More: Available Services** link to view other Deem Services available.

Learn More: Available Services

Get unprecedented control over employee spending, and give your employees access to the largest marketplace for services with over 160,000 merchants and third-party application providers.

Services currently available:
- Travel - Reduce travel costs by helping employees create an itinerary that meets their needs and complies with corporate policy.
- Airport Parking - Save money by letting employees pre-reserve off-airport parking with their next trip.
- Car Service - Increase traveler convenience and gain control over spending by reserving chauffeured car service online.
- Dining - Help your employees quickly find and book the perfect restaurant and save up to 10%.
- Event Tickets - Increase your visibility into spending and make it easier for employees to plan corporate entertainment online.
- Expense Management - Control expenses and save employees valuable time.
- Package Shipping - Save money by letting your employees schedule, label and track shipments straight from their desktops.
- Conferencing - Conveniently schedule web and audio conferences and create significant savings for your company.
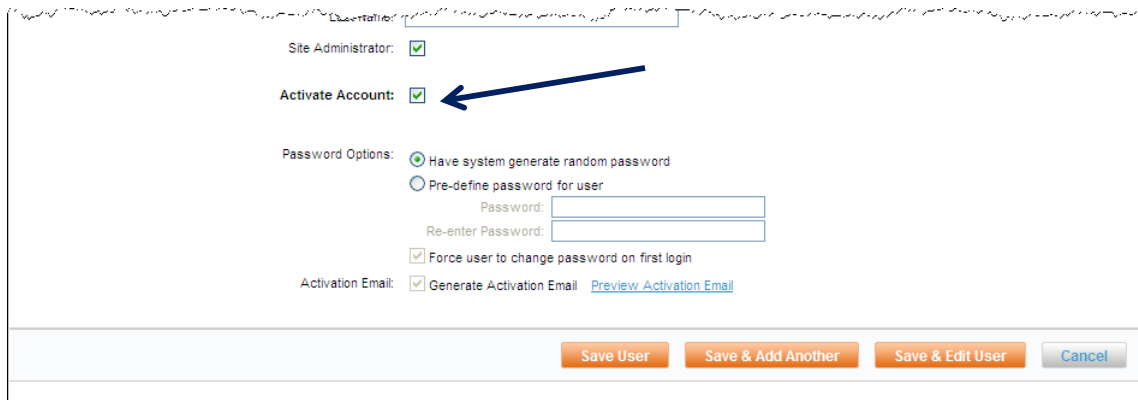
Close

7. Click the **Activate Account** checkbox.

Important Note: If the **Activate Account** checkbox is not selected, the user will not be able to log into Deem without additional steps by the site administrator.

After selecting the checkbox, additional fields are displayed:

- **Password Options:** Select either:

  Have system generate random password: The system will generate an Activation email and require the password be changed by the user upon first log in.

Note: Force user to change password on first login and Generate Activation Email are the defaults.

  Pre-define password for user: The password can be selected by the site administrator and will need to be changed by the user upon first log in.

Note: Force user to change password on first login is the default and Generate Activation Email is not available.

- o **Password:** If Pre-define password for user was selected, this is the password, which must be changed by the user upon first login.

- o **Re-enter Password:** If Pre-define password for user was selected, this is the confirmation of the password, which must be changed by the user upon first login.

- o **Activation Email:** Select this checkbox to send the new user an activation email.

- o **Preview Activation Email:** Click this link to preview the completed activation email. Enter the email address to receive the activation email preview when prompted.
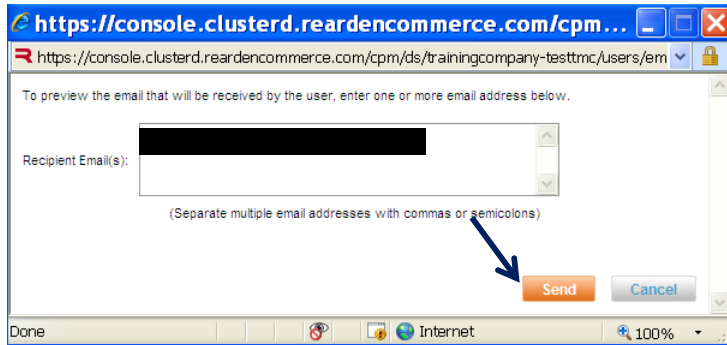
8. Click **Send** to send the preview activations email to the email address(es) entered.

9. The **Users | Add A User** page is redisplayed. Click **Save User** if finished adding users, **Save & Add Another** if adding another user and **Save & Edit User** to continue with the configuration of this user.

10. For the purpose of this document, we will click **Save & Edit User** to continue the configuration of this user.

Note: **Save User** and **Save & Add Another User** will generate the Activation Email if the Activation Email checkbox was selected.

11. The **Users | User Name** page is displayed. Edit the user from this page.

3.1.3 Edit a User

As a site administrator with **Users** tab privileges, user's profiles can be modified directly in the dashboard. In many cases, updates to the User Profile are done via a Human Resources feed. Check to be sure a feed is not used before making changes to the profile. Changes may be overridden the next time the feed occurs.

To manually edit a user in the Deem Travel Partner Dashboard:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Edit a User** link to edit an existing user of Deem.

5. The **Users | Edit a User** page is displayed. Enter search criteria.

6. Enter search criteria including the full or partial first name, full or partial last name, full or partial user name, email address, or employee ID of the user to be located. Searches can also be done by account type (End User, Support or all), if the user was manually added or if the user is inactive or not. Once

search criteria have been entered, click **Search**. A list of users who meet the search criteria is displayed.

Note: If more than 200 users meet the search criteria, the following message is displayed. Narrow the search criteria and click the **Search** button again.

7. The Search Results are displayed. Click the link below the user's name to select that user. The **Users | User Name** is displayed.

- **Title:** The user's title is displayed.

- **First Name:** The user's first name is displayed.

- **Last Name:** The user's last name is displayed.

- **User Name:** The user's user name is displayed.

- **External ID:** The user's external ID is displayed.

- **Job Title:** The user's job title is displayed.

- **Email:** The user's email address is displayed.

- **Business Phone:** The user's business phone number is displayed.

- **Mobile Phone:** The user's mobile phone number is displayed.

Note: Different options may be displayed depending on the functions enabled.

- **Assigned Expense approver:** If Expense is enabled, the name of the expense approver is displayed.

- **Expense Approver permission:** If Expense is enabled, does this user have expense approver ability.

- **Expense Payer permission:** If Expense is enabled, does this user have expense payer ability.

- **Assigned Shopping approver:** If Shopping is enabled, the name of the shopping approver is displayed.

- **Shopping Approver permission:** If Shopping is enabled, does this user have shopping approver ability.

- **Assigned Travel approver:** If Pre-trip Approval is enabled, the name of the travel approver is displayed.

- **Travel Approver permission:** If Pre-trip Approval is enabled, does this user have travel approver ability.

On the left navigator bar, **User Edit functions** are listed.

Support Information

Account Permissions

Profile:

- o **Personal and Employee Info**
- o **Address and Phone Numbers**
- o **Emergency Contact**
- o **Payment Cards**

Service Preferences:

- o **Travel**

Notifications:

- o **Notifications (Not managed from this page)**

Delegates:

- o **Delegates**

System Settings:

- o **Display Settings**

8. Click the **Support Information** link to view information used by Support about this user:

User Details			
Login Name	testusertmc	Email Notifications	████████████
Customer ID	343301224	Name	Chris Bland
User Account Creation Date	Jan 14 2013 - 11:59 AM EST		
User Status	Active	Contact Time	null - null
User Activation Date	Jan 14 2013 - 11:59 AM EST	First Login Time	
User Active in Company	true	Last Login Time	
Company Name	4testcompanytemplate-testtmc	Failed Login Attempts	0
RIM ID		Repeated Login Failure Time	
Time Zone	America/New_York	Failed Login Lockout-Time	
Calendar Attachment Type	None	Temporary Password Date	
Traveler Entity ID	0	Org Entity ID	0
Deem PNR Sync ID	312488089	Privacy Policy Accepted Time	
Last Profile Update Time		Last Modification Time	Jun 03 2014 - 1:58 PM EDT
Last Webservices Update Time		Is guest	false
Enabled Services (Group Name)	Travel (Everyone)		

9. Click the **Account Permissions** link to view / edit the user's account type. Click **Save** to save any changes. Click **Cancel** if no changes were made.

Account Permissions	
Account Type :	○ End User ● Support
Account Roles :	☑ Site Administrator

10. Click the **Personal and Employee Info** link to view / edit the personal and employee information. The page is divided into 2 sections.

Note: Fields displayed may be different depending on setting selections and custom fields enabled.

Note: Indicating a user is a **Support** user removes the user's activity from reports and statistics. Transactions made by a Support user are real and need to be cancelled or voided to avoid ticketing and billing!

- **Personal Information:**
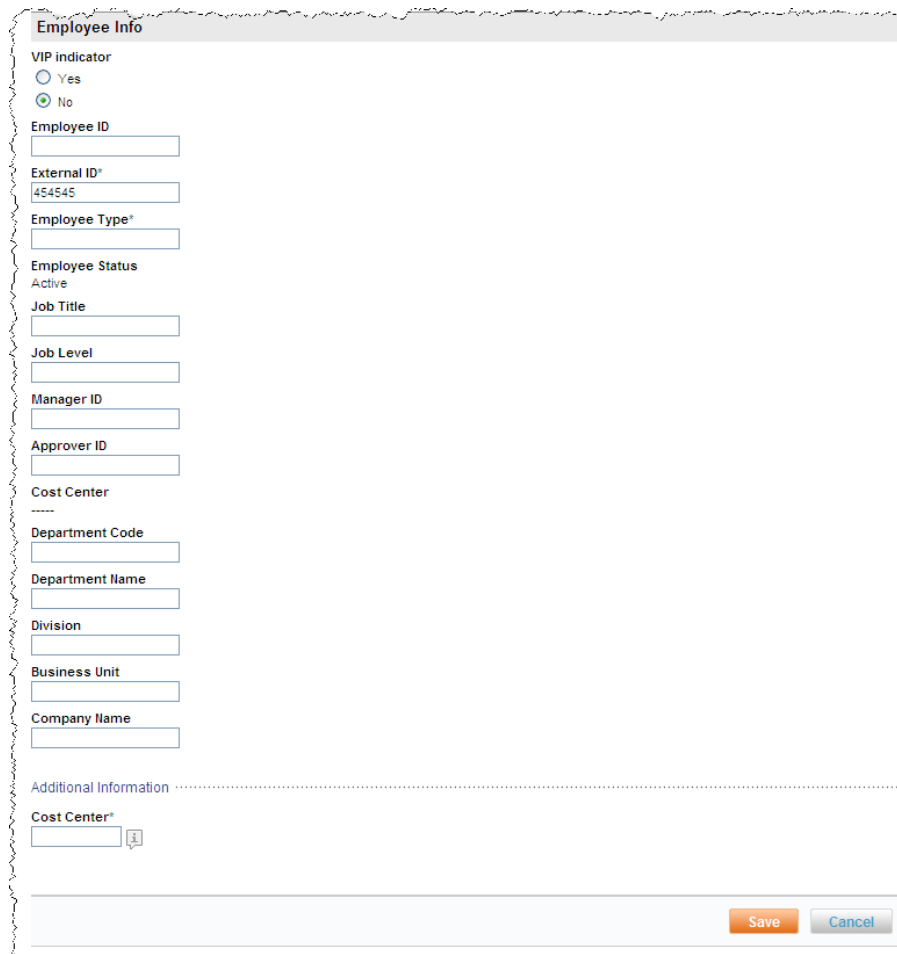
Personal Info

Title
Mrs. ▼

First Name*
Chris

Middle Name

Last Name*
Bland

Suffix

Username*
testusertmc

Date of Birth* ⓘ
** ▼ ** ▼ ** ▼
Date of birth displayed as ** for security reasons

Gender ⓘ
Female ▼

Profile Pin

Note: Date of birth will appear masked to the admin. Only the user themselves will see the actual date of birth.

- **Employee Information:**

Employee Info

VIP indicator
◯ Yes
◉ No

Employee ID

External ID*
454545

Employee Type*

Employee Status
Active

Job Title

Job Level

Manager ID

Approver ID

Cost Center

Department Code

Department Name

Division

Business Unit

Company Name

Additional Information ....

Cost Center*
[ ] ⓘ

[Save] [Cancel]
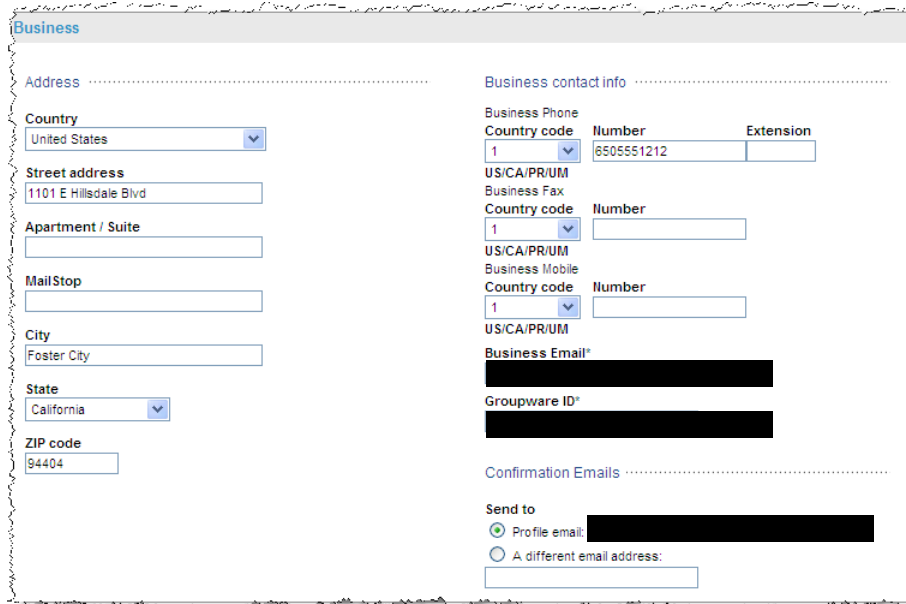
Note: Fields on the profile may appear differently depending on site configuration and features enabled.

11. Click **Save** to save any changes. Click **Cancel** if no changes were made.

12. Click **Address and Phone Numbers** to view / edit the address and phone number information. The page is divided into 2 sections.

Note: The address fields are dependent on the country selected from the drop down list. The examples here are based on the country having been selected as United States.

- **Business:**

- **Home:**

13. Click **Save** to save any changes. Click **Cancel** if no changes were made.

14. Click **Emergency Contact** to view / edit the emergency contact information.

Note: The address fields are dependent upon the country selected from the drop down list. The examples here are based on the country having been selected as United States.

15. Click **Save** to save any changes. Click **Cancel** if no changes were made.

16. Click **Payment Cards** to view / edit the credit card information.

   • The default credit cards are listed. To add a credit card, click **Add payment card**.

- The **Payment Card Information** page is displayed:

Payment Card Information:

- o **Corporate Card:** Select this check box if this is a Corporate Card.

- o **Name this Card:** (Required) Enter a name that will be meaningful to the end user. It will appear on drop down lists when credit cards are listed.

- o **Card Type:** (Required) Select the Card Type from the drop down list.

- o **Card number:** (Required) Enter the Card Number without dashes.

- o **Expiration date:** (Required) Select the Expiration Month and Year from the drop down list.

Billing Address:

- o **Company name:** Company name as it appears on the card, if this is a Corporate Card.

- o **Country:** Select the Billing Address country from the drop down list.

Note: The address fields are dependent on the country selected from the drop down list. The examples here are based on the country having been selected as United States.
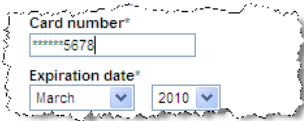
- o **Street address:** Enter the Billing Address street address.

- o **Apartment / Suite:** Enter the Billing Address apartment / suite number.

- o **Mailstop:** Enter the Billing Address mailstop.

- o **City:** Enter the Billing Address city.

- State: Select the Billing Address state from the drop down list.
- Zip code: Enter the Billing Address zip code.

Expiration alert:

- Display alert: Select the Display alert from the drop down list. A message will appear on the user's home page when this length of time remains to the Expiration Date.

17. Click **Save** to save any changes. Click **Cancel** if no changes were made. Once the credit card has been saved, only the last 4 digits of the card number will be displayed. The remaining numbers will be replaced with asterisks.
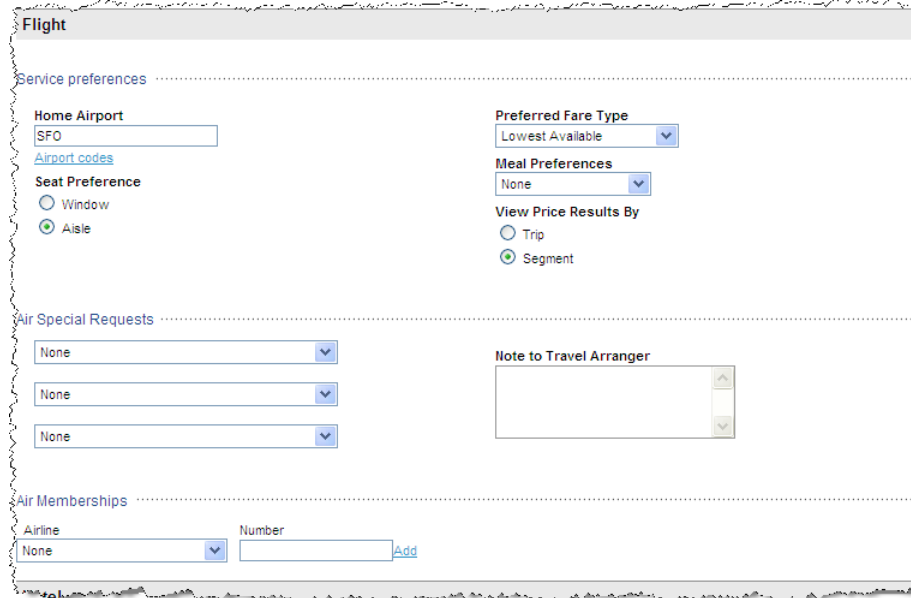
18. Click **Travel** to view / edit the travel preference information. The page is divided into 5 sections.

- **Flight:**
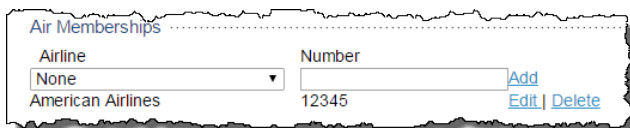
- Enter a **Home Airport, Preferred Fare Type, Meal Preferences, Seat Preference**, and pricing preference.
- Select up to 3 **Air Special Requests** from the drop down lists
- Add **Air Memberships** by clicking the **Add** link after entering the membership information.

- Edit or delete membership information by clicking the **Edit / Delete** link beside the membership to edit or delete.

o **Hotel:**

- Select up to 3 **Hotel Amenities** and / or **Hotel Special Requests** from the drop down lists.

- Add **Hotel Memberships** by clicking the **Add** link after entering the membership information.

- Edit or delete membership information by clicking the **Edit / Delete** link beside the membership to edit or delete.

o **Rental Car:**

- Select the **Default Car Size** from the drop down list.

- Select up to 3 **Car Special Requests** from the drop down lists.

- Add **Rental Car Memberships** by clicking the **Add** link after entering the membership information.

- Edit or delete membership information by clicking the **Edit / Delete** link beside the membership to edit or delete.

○ **Train:**

Train

Home Train Station

Default Search Type
◉ One Way
○ Round Trip

Preferred Service Class
Coach ▾

Membership Number
Rail Carrier   Number
None ▾   Add

- Enter the **Home Train Station.**
- Select the **Preferred Service Class** by clicking the drop down list.
- Enter the **Membership Number** information.
- Select the **Default Search Type** by clicking either the **One Way** or **Round Trip** radio button.

○ **Travel Documents:** Most travelers will have either a Passport or a Visa, but not both.

Travel Documents

Passport Information
No passports
Add a passport

Visa Information
No visas
Add a visa

National ID Information
No national ID cards
Add national ID card

- Click **Add a passport** to add a passport.

Information

Country
United States ▾

Expiration date
March ▾   24 ▾   2011 ▾

Issue date
March ▾   24 ▾   2006 ▾

Number
12345678

Issue country
United States ▾

Display alert
6 months prior to expiration ▾

Save   Cancel

▪ Enter the Passport Information:

- **Country:** Select the residency country from the drop down list
- **Expiration Date:** Select the Expiration date from the drop down lists
- **Issue Date:** Select the Issue date from the drop down lists.

- **Number:** Enter the Passport Number

- **Issue Country:** Select the issuing country from the drop down lists

- **Display alert:** Select the display alert from the drop down list. A message will appear on the user's home page when this length of time remains to the Passport Expiration Date.

o Click **Save** to save any changes. Click **Cancel** if no changes were made. The **Travel Documents** page is re-displayed.

Note: A second Passport may be added if the traveler had been issued a new passport, possibly as a result of marriage / divorce where a name change has taken place or upon renewal of an expiring passport.

---

o Edit or delete a Passport by clicking the **Edit / Delete** link beside the passport to edit or delete.

o Click **Add a Visa** to add a visa.

- Enter the Visa Information:

  - **Country:** Select the residency country from the drop down list

  - **Expiration Date:** Select the Expiration date from the drop down lists

  - **Number:** Enter the Visa Number

  - **Visa Type:** Select the Visa Type from the drop down list.

  - **Display alert:** Select the display alert from the drop down list. A message will appear on the user's home page when this length of time remains to the Visa Expiration Date.

o Click **Save** to save the entry. Click **Cancel** if no changes were made.

o Edit or delete a Visa by clicking the **Edit / Delete** link beside the Visa to edit or delete. The **Travel Documents** page is re-displayed.

o **Additional Documents:** Many travelers will also have Redress or Known Traveler Numbers.

- Enter a **Redress** number. This is a number for those travelers who use the Department of Homeland Security's Redress Inquiry Program.

- Enter the **Known Traveler Number**. This is a number assigned by the Transportation Security Administration

  o Click **Save** to save Travel Preferences for the user. Click **Cancel** if no changes were made.

- **Notifications** are not maintained here and are discussed in a later session.

- Click the **Delegates** link to view / edit delegate settings for the user. The **Delegate Access** page is displayed.

Note: A delegate is a user who is able to book travel or other services for another user. Delegates can be assigned by the other user or if allowed by the delegate themselves.

19. Click the **Add a delegate** link to add a user who can book travel for you.

  o Enter the full or partial **Name** or **email address** of the user who can book travel for you and click **Search** to locate the user.

Note: The user must have a status of **Active** to be displayed.

20. Click the radio button beside the user to select them and click **Select** to allow them to book travel for you.

  o The **Delegate Access** page is redisplayed with the selection(s).

- Click the **Become a delegate** link to add a user who for whom you can book travel and other services.

- Enter the full or partial **Name** or **email address** of the user for whom you can book travel for and click **Search** to locate the user.

Click the radio button beside the user to select them and click **Select** to allow you to book travel for them.

Note: The user must have a status of **Active** to be displayed. Self-delegation is controlled at the site level. An email is sent to the person to notify them that you have become a delegate for them.

o The **Delegate Access** page is redisplayed with the selections.

o Remove a delegate by clicking the **Delete** link beside their information.

Note: When adding yourself as a delegate for someone else, an email is sent to that person to assure they are aware you have made yourself a delegate for them.

21. Click the **Display Settings** link to view / edit the display preferences for the user.   The **Display Settings** page is displayed.

- o **Date:** Select either Month Day Year or Day Month Year.
- o **Time:** Select either a 12 hour or 24-hour clock.
- o **Time zone:** Select the preferred time zone from the drop down list.
- o **Measurement:** Select the preferred unit of measure – US / Imperial or Metric.
- o **Currency**: Select the currency from the drop down list.
- o **Country**: Select the country from the drop down list.

22. Click **Save** to save the Display Settings or click **Cancel** if no changes were made.

3.1.4 *Single User Activation – User Password Reset*

The **Single User Activation** link is used to activate a single user or a small group of users and most commonly to reset a user password.

To **Activate a Single User**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Single User Activation** link to activate users one at a time.

5. The **Users | Activate Users** page is displayed. Enter search criteria. Enter the full or partial first name, full or partial last name, full or partial user name, email address, or employee ID of the user to be located. Search by account by type (End User, Support or all), if the user was manually added or if the user is inactive or not.

6. Once search criteria have been entered, click **Search**. A list of users who meet the search criteria is displayed.

7. Click the **Add** button to select a user for processing. The user will appear in the **Selected Results** list.

Note: Remove a name from the list by clicking the **Remove** button beside the user. This will remove the user from the Selected Results.

8. Once all users to be processed have been selected, click the **Continue** button. Continue to search for and add users to the **Selected Results** until the **Continue** button has been clicked.

The **Users | Confirmation** page is displayed.

- **Selected Results:**
  - ○ **Status:** The status of the user in the system – either Active or Not Active.
  - ○ **Status In Company:** The status of the user within the company – either Active or Not Active.

Note: An **Active** user will appear in reports; a **Not Active** user will not appear in reports.

  - ○ **Type:** Type of user – either Support or End User.

Note: An **End User** will appear in reports; a **Support** user will not appear in reports.

  - ○ **Source:** The method by which this user was loaded – either manual load or file upload.

- **Activate Account:**

  - o **Password Options:**

    - Have system generate random password: The system will generate an Activation email and require the password be changed by the user upon first log in.

    - Pre-define password for user: Select this option to pre-define a password. Enter and confirm entry of the password.

    - Force user to change password on first login – This entry is selected as the default when the system generated password option is selected.

  - o **Generate Activation email** – Select this option to generate the Activation email.

  - o **Preview Activation Email** – Click this link to preview the completed activation email. Enter the email address to receive the activation email preview when prompted.

9. Click the **Activate Now** link to send the email and activate the user.

Important Note: By generating the activation email, the user's password is being reset.

3.1.5 Single User Deactivation

Deactivating a user does not delete the user from the database. If a user is accidentally deactivated, they can easily be reinstated.

The process to deactivate a user is very similar to activating a user.
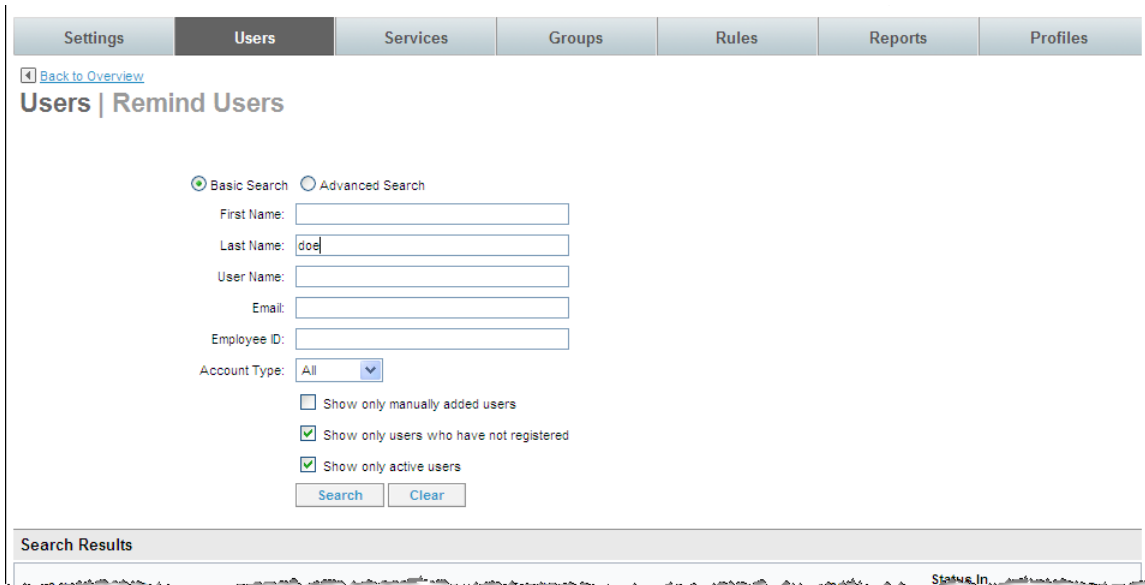
To **Deactivate a Single User**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Single User Deactivation** link to deactivate users one at a time.

5. The **Users | Deactivate Users** page is displayed. Enter search criteria.

Enter the full or partial first name, full or partial last name, full or partial user name, email address, or employee ID of the user to be located. Search by account type (End User, Support or all), if the user was manually added or if the user is inactive or not.

- **Show only active users:** By selecting this button, only the users currently having a status of active will be returned.

- **Show only inactive (site) users still active in company:** By selecting this button, only the users currently having a status of inactive at the super domain level will be returned. Inactive super domain users which are still active in the company have a status of Active, but do not appear on reports.

- **Show all users:** By selecting this button, all users – both active and inactive will be returned.

6. Once search criteria have been entered, click **Search**. A list of users who meet the search criteria is displayed.

7. Click the **Add** link to select a user for processing. The user will appear in the **Selected Results** list.

8. Once all users to process have been selected, click the **Continue** button. Continue to search for and add users to the **Selected Results** until the **Continue** button has been clicked.

The **Users | Confirmation** page is displayed:

9. Cancel processing or

- Click the **Deactivate and Mark Inactive in Company** to disable login ability for the user and mark them as inactive. This is used most often when an employee has left the company and is not expected to return. This user would also be removed from reports and statistics.

- Click the **Deactivate Now** button to disable login ability for the user. This is used most often when an employee has taken a leave of absence or similar temporary absence from the company and is expected to return. This user would continue to be included in reports and statistics.

3.1.6 Single User Registration Reminder

A registration reminder is sent to remind a user to perform the registration process and begin using Deem.

The process to send a single user registration reminder is very similar to activating or deactivating a user.

To send a **Single User Registration Reminder**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Single User Registration Reminder** link to remind users to register one at a time.

5. The **Users | Remind Users** page is displayed. Enter search criteria.

Enter the full or partial first name, full or partial last name, full or partial user name, email address, or employee ID of the user to be located. Search by account type (End User, Support or all), if the user was manually added or if the user is inactive or not.

- **Show only manually added users:** By selecting this button, only the users added manually will be returned.

- **Show only users who have not registered:** By selecting this button, only users who have been invited to register and have not will be returned.

- **Show only active users:** By selecting this button only users who have been invited to register and have already done so will be returned.

6. Once search criteria have been entered, click **Search**. A list of users who meet the search criteria is displayed.

7. Click the **Add** link to select a user for processing. The user will appear in the **Selected Results** list.

Note: Remove a name from the list by clicking the **Remove** button beside the user.

8. Once all users to process have been selected, click the **Continue** button. Search for and add users to the **Selected Results** until the **Continue** button has been clicked.
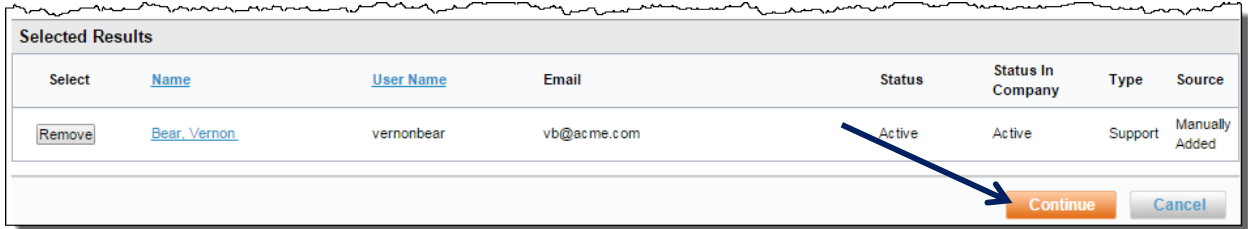
The **Users | Confirmation** page is displayed:
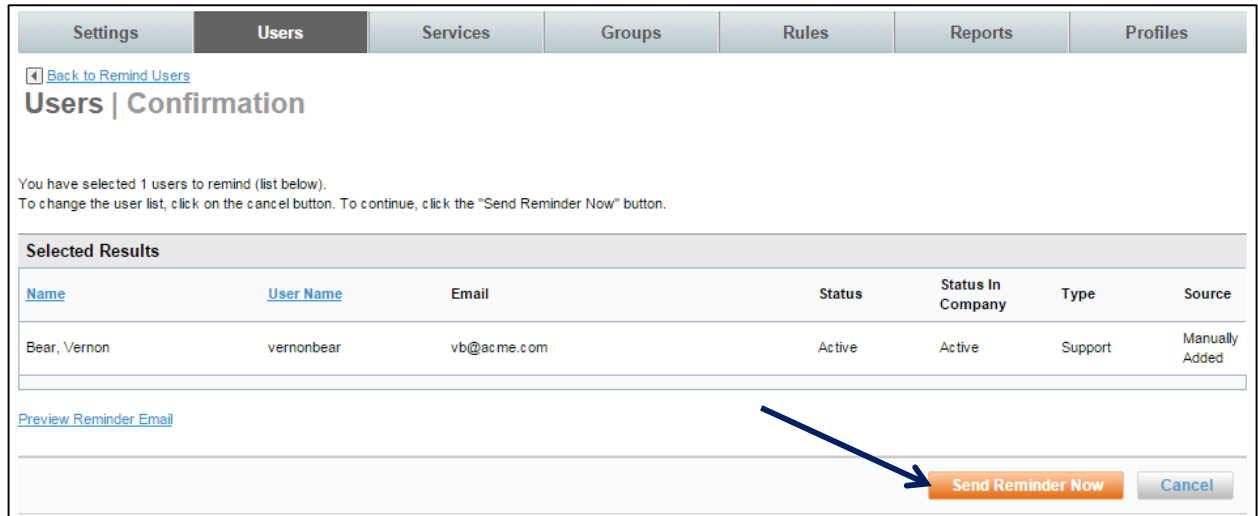
9. Click the **Send Reminder Now** button to send the reminder email. Preview the reminder email by clicking the **Preview Reminder Email** link. Enter an email address that will receive the email preview when prompted.
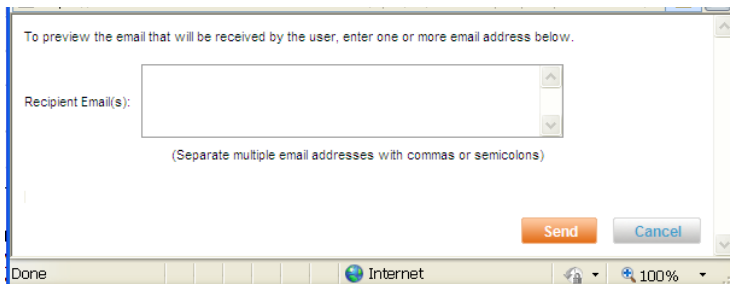
10. Click **Send Reminder Now** to send the registration reminder email.

3.1.7 Bulk User Activations and Reminders

Bulk User Manager Privileges allow the Site Administrator to schedule activation and reminder email jobs, view job logs and edit ongoing scheduled jobs.

Bulk User Activation is used to activate several users, a group of users or most often to reset passwords. It is important to pay close attention to search criteria selected.

Bulk User Reminders are used to send registration reminder emails to several users or a group of users to remind a previously invited user to perform the registration process and begin using Deem.

The process to send Bulk User Activations and Reminders is very similar to the Single User Activation and Single User Registration Reminder process.

To send a **Bulk User Registration Reminder:**

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users Tab permissions.

2. The **Partner Dashboard → Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Bulk User Activation and Reminders** link to activate and remind users to register several at a time.

5. The **Users | Bulk Activations and Reminders** page is displayed.

- **Bulk User Activation and Reminders** options include:

o **Schedule Bulk Activations and Reminders:** Click this link to schedule activations or reminders for multiple users by group

o **Activity Logs:** View previously submitted bulk user activation or reminder job activities.

o **Schedule Logs:** View scheduled bulk user activation or reminder jobs.

3.1.7.1 *Schedule Bulk Activations and Reminders*

1. Click the **Schedule Bulk Activations and Reminders** link to schedule activation or reminders. The **Users | Schedule** page is displayed:

o **Schedule Options:**

- **Now:** Schedule the activity to run one time now.

- **Once, on...:** Schedule to activity to run one time. Select a **Start Date** and **Time** for the activity to run. The **Month** drop down also includes a year.

Schedule: Once, on...
Start Date: Aug 13
Time: 9 AM : 43 (Pacific Time)

- **Daily:** Schedule the activity to run every day. Select a **Start Date** and **Time** for the activity to run. Select the duration for which the job will run daily.

  - **No end date:** The activity will run until it is manually stopped.

Schedule: Daily
Start Date: Aug 13
Time: 9 AM : 43 (Pacific Time)
Duration: ⦿ No end date
◯ Through end date
◯ Specify number of occurrences

  - **Through end date:** The activity will run until the **End date** specified. The **Month** drop down also includes a year.

Duration: ◯ No end date
⦿ Through end date
End date: Aug 1 (Pacific Time)

  - **Specify number of occurrences:** The activity will run for the specific number of times

Duration: ◯ No end date
◯ Through end date
⦿ Specify number of occurrences
Number of occurrences: [   ]

- **Periodic:** Schedule the activity to run periodically. Select a **Start Date** and **Time** for the activity to run. Select the "Repeat every" information and duration for which the job will run periodically.

  - **No end date:** The activity will run until it is manually stopped.

Schedule: Periodic
Start Date: Aug 13
Time: 9 AM : 43 (Pacific Time)
Repeat Every: 00 hours 00 minutes for: 2 times.
Duration: ⦿ No end date
◯ Through end date
◯ Specify number of occurrences

  - **Through end date:** The activity will run until the **End date** specified. The **Month** drop down also includes a year.

Duration: ◯ No end date
⦿ Through end date
End date: Aug 1 (Pacific Time)

  - **Specify number of occurrences:** The activity will run for the specific number of times

- **Weekly:** Schedule the activity to run weekly. Select an **Occurs On** day of the week. Also select a **Start Date** and **Time** for the activity to run. The **Month** drop down also includes a year. Select the duration for which the job will run weekly.

    - **No end date:** The activity will run until it is manually stopped.

    - **Through end date:** The activity will run until the **End date** specified. The **Month** drop down also includes a year.

    - **Specify number of occurrences:** The activity will run for the specific number of times

- **Bi-Weekly:** Schedule the activity to run every other week. Select an **Occurs On** day of the week. Also select a **Start Date** and **Time** for activity to run. The **Month** drop down also includes a year. Select the duration for which the job will run bi-weekly.

    - **No end date:** The activity will run until it is manually stopped.

    - **Through end date:** The activity will run until the **End date** specified. The **Month** drop down also includes a year.

- **Specify number of occurrences:** The activity will run for the specific number of times

- **Monthly:** Schedule the activity to run monthly. Select a **Start Month** and **Time** for the activity to run. Also select the **Occurs On (Day of the Month):** from the drop down list. The list also includes "Last" for the last day of the month. Select the duration for which the job will run monthly.

  - **No end date:** The activity will run until it is manually stopped.

  - **Through end date:** The activity will run until the **End date** specified. The **Month** drop down also includes a year.

  - **Specify number of occurrences:** The activity will run for the specific number of times

- **Job Options:** Enter a meaningful description of the job and the email address to which the job report will be sent. Enter more than one email address separated by commas or semicolons if needed.

o **Activate / Remind Options:** Select either Activation or Reminder emails.

- Select the **Activate** radio button if this job is to send activation emails.

- **Group Name:** Select a group of users from the drop down list.
- **Include inactive users (Default, recommended):** Selecting this option will only include users with a status of inactive. *It is RECOMMENDED this option be used.*
- **Include activated unregistered users:** Selecting this option will only include unregistered users. Using this option may confuse a user who has already received one activation email and hasn't acted upon it. They will now have 2 emails with differing passwords to use when they register.
- **Include registered users (Warning! This will reset all currently registered users and passwords.):** Selecting this option will reset all active, registered users' passwords. It is recommended to NOT use this option. Selection of this option will result in the following warning popup.
- **Include registered users added after:** Select a **Date** including year and **Time.**
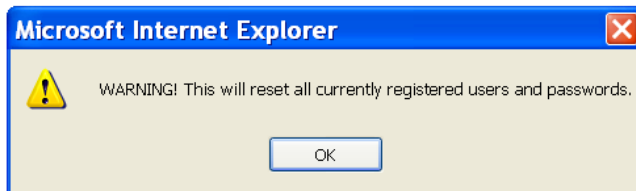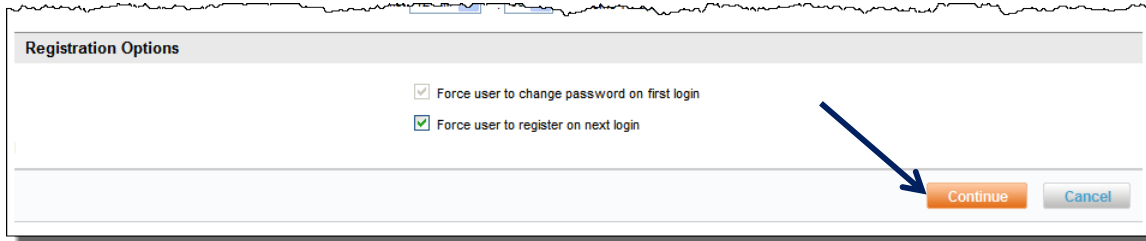
- Include registered users added after: Select a Date including year and Time.
- Select the **Remind** button if this job is to send reminder emails.

- **Group Name:** Select a group of users from the drop down list.
- **Include registered users added after:** Select a **Date** including year and **Time.** Notice this is the only available option when the **Remind** radio button is selected.

o **Registration Options:** The last selection is the Registration Options.
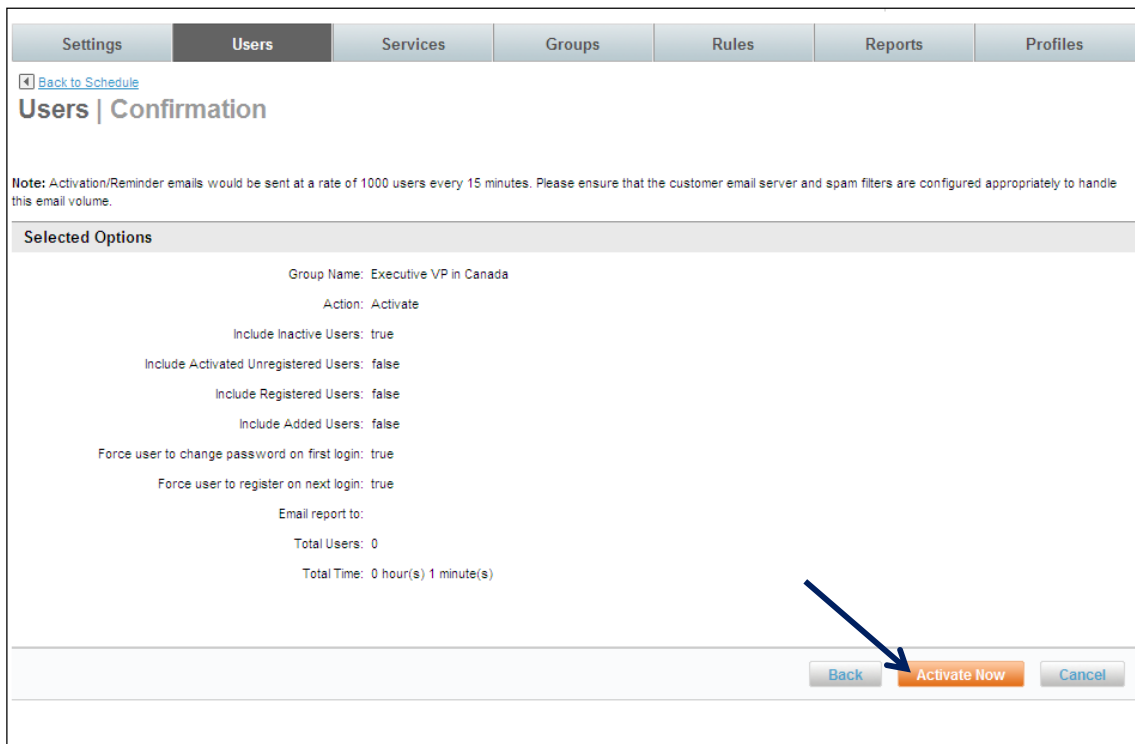
Registration Options

☐ Force user to change password on first login

☑ Force user to register on next login

Continue   Cancel

- When the **Activate** option is selected, select Force user to register on next login if appropriate.

- When the **Remind** option is selected, there are no registration options available for selection.

2. Click **Continue** to review the search criteria results before submitting the job to run. The **Users | Confirmation** page is displayed:

Settings	Users	Services	Groups	Rules	Reports	Profiles

◄ Back to Schedule

Users | Confirmation

Note: Activation/Reminder emails would be sent at a rate of 1000 users every 15 minutes. Please ensure that the customer email server and spam filters are configured appropriately to handle this email volume.

Selected Options

Group Name:	Executive VP in Canada
Action:	Activate
Include Inactive Users:	true
Include Activated Unregistered Users:	false
Include Registered Users:	false
Include Added Users:	false
Force user to change password on first login:	true
Force user to register on next login:	true
Email report to:	
Total Users:	0
Total Time:	0 hour(s) 1 minute(s)

Back   Activate Now   Cancel

3. Click **Activate Now**, or click **Back** to select a different search criteria or **Cancel** to cancel the process.

3.1.7.2 Activity Logs

Bulk User Manager Privileges allow the Site Administrator to view activity logs of Activation and Reminder jobs already run.

1. Select the Activity Logs link from the Users | Bulk User Activations and Reminders page.

2. The **Users | Activity Logs** page is displayed.

- **Action Type:**
  - o **Activate**: Displays a list of activation jobs that have been previously run.

- o **Description:** Displays the description of the job.
- o **Schedule:** Displays the scheduling option of the job.
- o **Started:** Displays the start date and time of the job.
- o **Completed:** Displays the end date and time of the job.
- o **Processed Users:** Displays the job's number of processed users.
- o **Activated Users:** Provides a link to download a list of activated users.

3. By clicking the **Description** link, the job detail is displayed:

Settings	Users	Services	Groups	Rules	Reports	Profiles

◄ Back to Bulk User Activations and Reminders

Users | Activity Logs

Job Name:	Acme Activation (Activate)
Submitted By:	carolw
Group Name:	Everyone
Include Inactive Users:	true
Include Activated Unregistered Users:	false
Include Registered Users:	false
Include Added Users:	false
Force user to change password on first login:	true
Force user to register on next login:	true
Job Status:	Completed
Submitted:	6/15/08 9:28 AM
Started:	6/15/08 9:28 AM
Completed:	6/15/08 9:28 AM
Email report to:	

Refresh | Back

Note: "Watch" a job as it is running by clicking the Refresh button.

4. Download a file containing the data processed by the job by clicking the **Download** link.

- **Action Type:**
  - o **Remind:** Displays a list of reminder jobs that have been previously run.

- - **Description:** Displays the description of the job.
  - - **Schedule:** Displays the scheduling option of the job.
  - - **Started:** Displays the start date and time of the job.
  - - **Completed:** Displays the end date and time of the job.
  - - **Processed Users:** Displays the job's number of processed users.
  - - **Reminded Users:** Provides a link to download a list of users reminded.

5. By clicking the **Description** link, the job detail is displayed:

Note: A job can be "watched" as it is running by clicking the **Refresh** button.

6. By clicking the **Download** link, a file can be downloaded containing the data processed by the job.

3.1.7.3 Schedule Logs
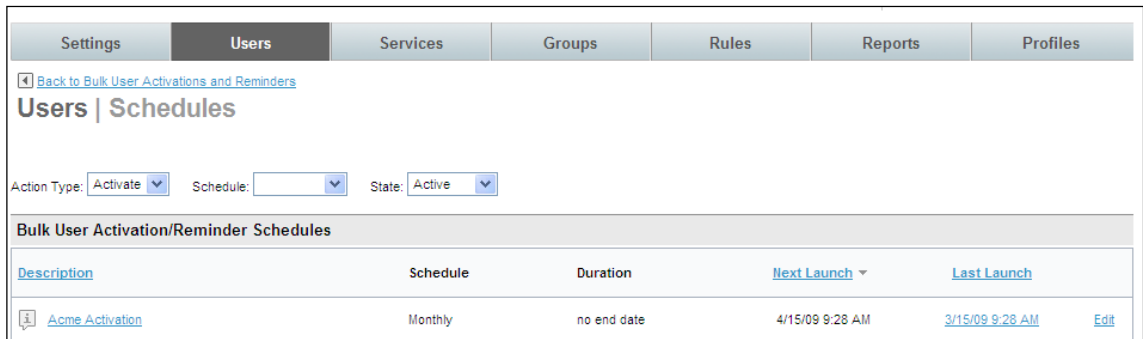
Bulk User Manager privileges allow the Site Administrator to view activity logs of scheduled jobs already processed and edit the running of upcoming jobs.

1. Select the **Schedule Logs li**nk from the **Users | Bulk User Activations and Reminders** page.

2. The **Users | Schedules** page is displayed.

- o **Action Type:**
  - **Activate:** Displays a list of activation jobs that have been previously run.
  - **Remind:** Displays a list of reminder jobs that have been previously run.
- o **Schedule:**
  - **Now:** Limit the display to only jobs that were run with a schedule of "Now".
  - **Once, on:** Limit the display to only jobs that were run with a schedule of "Once, on".
  - **Daily:** Limit the display to only jobs that were run with a schedule of "Daily".
  - **Periodic:** Limit the display to only jobs that were run with a schedule of "Periodic".
  - **Weekly:** Limit the display to only jobs that were run with a schedule of "Weekly".
  - **Bi-Weekly:** Limit the display to only jobs that were run with a schedule of "Bi-Weekly".
  - **Monthly:** Limit the display to only jobs that were run with a schedule of "Monthly".
- o **State:**
  - **Active:** Limit the display to only jobs that have a status of "Active".
  - **Expired:** Limit the display to only jobs that have a status of "Expired".
  - **Cancelled:** Limit the display to only jobs that have a status of "Cancelled".

- o **Description:** Displays the description of the job.
- o **Schedule:** Displays the scheduling option of the job.
- o **Duration:** Displays the duration of the job.
- o **Next Launch:** Displays the date the job is scheduled to run next.
- o **Last Launch:** Displays the date the job ran last.

3. Click the **Edit** link.

The **Users | Edit Schedule** page is displayed:

- o Edit the **Job Description** and **Email report to:** options for future jobs if appropriate.
- o Cancel the recurrence of the job by clicking the **Cancel Job** link.
- o Remember to click **Save Job** if changes have been made.

4. Click the **Description** link.

The **Users | Schedule Details** page is displayed. The job detail is displayed with resulting individual jobs run listed at the bottom of the page. Clicking on the individual job name will display the individual job detail.

- o By clicking the individual job's **Download** link, a file containing the data processed by the individual job can be downloaded.

3.1.8 Impersonate User

As a site administrator it may become necessary to impersonate a user to determine what the user is experiencing. Impersonation allows the site administrator to be logged onto Deem as the impersonated user to clearly identify and address issues affecting a single user.

Note: Be reminded that while impersonating the user, any action taken is real and will reflect the impersonated user's imprint. Do not book or cancel flights that are not intended to be booked or cancelled.

To **Impersonate a User:**

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users Tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

4. The **Users | Overview** page is displayed. Click the **Impersonate a User** link to search for and then impersonate a user on Deem.

5. The **Users | Impersonate User** page is displayed.

6. Enter the full or partial first name, full or partial last name, full or partial user name, email address, employee ID of the user, or account type (End User, Support or all). Click **Search** to locate the user to impersonate.

7. All users meeting the search criteria are displayed. Select a user by clicking on their **Name** link.

The site administrator is logged into the Deem application impersonating – or pretending to be - the selected user.

IMPORTANT NOTE: The site administrator's user name is displayed for reference at the top of the page. Be extremely careful when impersonating a user – bookings are "real".

8. First click the name and then select **Close** from the drop down list to return to the Partner Dashboard.

3.1.9 *User Statistics*

As a site administrator with Adoption Manager Privileges, site statistical data is available.

To view **User Statistics**:

9. Access the Deem Travel Partner Dashboard using the User Name and Password with Users Tab permissions.

10. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

11. The **Settings | Overview** page is displayed. Click the **Users** tab to access the user maintenance functions.

12. The **Users | Overview** page is displayed. Click the **User Statistics** link to view user adoption activity.

13. The **Users | User Statistics** page is displayed.

Each of the fields is defined at the bottom of the page.

Note: The Total Employees field is the number entered when the site was created. It may not be an accurate number of employees of the company.

14. Click the **View** link to download a file containing the specific users and their data.

Note: To have the **View** link available for selection, the **Adoption Manager** role in must be in the site administrator's profile.

3.2 The Settings Tab

After a site has been cloned, certain areas of the dashboard need to be updated to meet specific client and agency requirements for the site. Many of these areas are found on the **Settings** tab.

1. Access the Deem Travel Partner Dashboard using a User Name and Password with **Settings** tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed.

The **Settings Tab** contains links to several options including but limited to:

- General Settings
- Company Information
- Groupware Servers
- Email Settings
- FTP Servers
- Open Enrollment
- Mobile Settings
- Password Security
- Home Page Options
- Logo Image Upload
- Privacy Policy Settings
- Profile Field Settings
- Web Services
- Single Sign On

- Meeting Settings
- Cvent Meeting Settings

3.2.1 General Settings

1. Click the **General Settings** link found on the **Settings** tab of the Deem Travel Partner Dashboard.

2. The **General Settings** page is displayed. It is divided into several sections:

   o **General Settings:** Settings stored in this section include launch date, several site level delegation settings and URL information for Help and FAQ pages along with other "general" settings.

   o **Spend Management Messages:** This section defines messaging for out of policy trips.

   o **Help Desk:** Information to link to a Help Desk is defined in this section.

   o **Calendar Attachments:** The software product to use for calendar entries is defined in this section.

General Settings:

- o **Launch Date:** Select Month, Day and Year from the drop down list. This date is crucial for reporting, tracking, and adoption. It will not be displayed to the end user. It is highly recommended this field be completed.

- o **User session timeout after _ minutes of idle time:** Select the length of time during which if there is no user input, the user will be automatically signed out of the dashboard. The selection is in 5 minute intervals with a maximum of 15 minutes.

- o **Enable Daily Payer Notification emails:** This checkbox governs if daily emails will be sent to expense payers.

- o **Turn on automated Travel-based email reminders for Expense:** This checkbox governs if email reminders will be sent for travel-based expenses.

- o **Send registration emails:** This checkbox governs if registration emails can be sent out from this site. It is recommended this checkbox be selected to allow the emails.

deem.com

- **Send system emails in HTML format:** This checkbox governs if emails will be sent in HTML or in plain text format. Checking this box sends emails in HTML format, leaving the checkbox unchecked results in emails sent in plain text.

- **Enable Treo wireless access**: Currently not in use.

- **Allow User Delegation:** A delegate is a user who has been enabled as someone who can book travel and other services on behalf of another user or traveler. Checking this box will allow this functionality for this site. Leaving the checkbox unchecked results in no user delegation for this site.

- **Allow Self Delegation:** A delegate is a user who has been enabled as someone who can book travel and other services on behalf of a traveler. Checking this box will allow a user to designate themselves as a delegate for another user or traveler. Leaving the checkbox unchecked results in the user or traveler setting up delegates for themselves.

- **Allow Address Book Access:** This checkbox allows access to the corporate address book.

- **Allow Importing and Exporting Contacts:** This checkbox allows contacts to be imported and exported for use during shipping and car service.

- **Enable Profile Marketing View:** This checkbox allows the display of a marketing banner to the end user instead of the standard profile page. Generally this is used for self-service sites only.

- **Display customer-defined help** link:
  - **Help Link URL:** Enter the URL of the Help site. It must begin with http:// or https://. The Deem default site URL is loaded. If the company has its own help site, enter the URL here.
  - **Help Link Label:** Enter the Name to display as the label of the URL.

- **Display a hint to users on the sign-in page**:
  - **Hint Text:** This hint will be displayed upon access to the login page. The Deem default hint is loaded – "Add to Favorites". To edit the hint text, enter the hint text here.

- **Display a hint to users on the password reset page:**
  - **Hint Text:** This hint will be displayed when a password is being reset. The Deem default hint is loaded "Your password cannot contain the following". To edit the hint text, enter the hint text here.

- **Calendar Object Footer Text:** This text will be displayed at the bottom of every calendar entry that is the result of a calendar event being added to an Outlook or Lotus Notes calendar. The Deem default text is loaded. To edit the footer text, enter the footer text here.

Spend Management Messages: This section is used to define out of policy messaging.

Spend Management Messages

Policy Violation Reason Text:
> This request is out of policy. You have entered the following reason for booking the request:

Inadvertent Policy Violation Text:
> The provider has quoted a price that is out of policy. Modify or cancel this request to stay within corporate policy.

Policy Compliance Information Text:
> Your request has been updated. You are no longer out of policy.

- ○ **Policy Violation Reason Text:** This text will be displayed to the end user when a trip has been selected that is out of policy.

- ○ **Inadvertent Policy Violation Text:** This text will be displayed to the end user when a trip has been selected that is out of policy.

- ○ **Policy Compliance Information Text:** This text will be displayed to the end user when a previously determined out of policy trip has had a compliance code applied.

Help Desk: Depending on the levels of support agreed upon by the agency, the Contact Name and Method may change.

Help Desk

☐ Display a hint to users on the technical support method

Note - assign class with "textFooter" to use footer style

Hint Text:

Help Desk Contact Name:
Help Desk Contact Method:

Note: Generally the **Display a hint to users on the technical support method** is selected and the hint text is populated.   Regardless of the options selected, the information entered is displayed at the bottom of the dashboard and Deem pages as a hint for access to Support.

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- ○ **Display a hint to users on the technical support method:**
    - – **Hint Text:** Enter a free form HTML friendly text message that will be displayed at the bottom of each page as a hint for access to Support. The text will also print in the email footer for emails to delegates, for example.

OR:

- o **Help Desk Contact Name:** Enter the name of a Help Desk Contact.

- o **Help Desk Contact Method:** Enter the method to use when contacting the Help Desk.

UI: This section **should not be changed**.

Calendar Attachments: This section is used to define the calendar software program used when a calendar entry is sent.

Note: If assistance is needed while completing this section, open a ticket on the Customer Support Portal and assign it to the Integration team.

- o **Display name for iCal:** Enter the name and version of Outlook, Microsoft Exchange or Lotus Notes being used.

- o **Automatically Update the Calendar of Internal Invitees:** Select this checkbox if using Groupware.

3. Click **Save** to save the General Settings page.

4. Click the **Changes not applied** link to commit changes.

3.2.2 Company Information

Company information is used by Deem Support and other internal areas for reference only.

To access the **Company Information:**

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Settings Tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Company Information** link to view company address and contact information.

4. The **Settings | Company Information** page is displayed. Click the **Add a Company** link to add a company or the Company name to view an existing company's information.

5. The **Settings | Add Company** page is displayed.

- o **Company Information:**

Note: Although the entries on this page are for information only, it is recommended it be provided. Several services use the information found here if the data is not supplied elsewhere.

- - Company Name: (Required) The name of the new company that will display on the Change Domain page
- - Country: Company country name
- - Street 1: Company street address line 1
- - Street 2: Company street address line 2
- - Suite / Apt: Company suite or apartment number
- - City: Company city
- - State: Company state
- - Zip Code: Company Zip Code
- - Phone: Company main phone number
- - Email: Company main email address

- o **Contact Information:**

- - Name: Company main contact name
- - Phone: Company main contact phone number
- - Email: Company main contact email address

- o **Additional Information:**

- - Comment 1: Available for special PNR handling

- Comment 2: Available for special PNR handling

- Comment 3: Available for special PNR handling

6. Click **Save** to save the company information.

7. Click the **Changes not applied** link to commit changes.

3.2.3 Email Settings

Email templates are set up for Activation, Reminder and Password Reset emails within the **Email Settings** link found on the **Settings** tab of the Deem Travel Partner Dashboard.

To access the **Email Settings**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Settings Tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Email Settings** link to set up activation, reminder and password reset email templates.

The **Settings | Email Settings** page is displayed. The page is divided into several sections:

- Application URL Definition

- End User E-Mail Definitions

- Support User E-Mail Definition

▪ **Application URL:**

○ **Application URL for end user:** This is the URL or address used by the end user to access Deem.

Note: The Application URL **must** be updated to include the new site name when using a cloning template to create this site. Example: http://newsite.deem.com.

○ **Application URL for administrator:** This is the address used by a support user to access Deem.

Note: The Application URL **must** be updated to include the new site name when using a cloning template to create this site. Example: http://newsite.deem.com.

○ **From email display:** Enter the name to be displayed as the email sender.

○ **From email address:** Enter the email address to be displayed as the email sender.

Note: The "From email display:" and "From email address:" information **should NOT** be changed from what was set on the template site because of firewall and spam filtering.

○ **Activation email subject:** Enter the text to use as the subject line when an activation email is sent. This field is pre-populated when the site is the result of cloning a template site and can be changed if necessary.

○ **Registration email subject:** No longer in use.

○ **Reminder email subject:** Enter the text to use as the subject line when a reminder email is sent. This field is pre-populated when the site is the result of cloning a template site and can be changed if necessary.

○ **Password reset email subject:** Enter the text to use as the subject line when a password reset email is sent. This field is pre-populated when the site is the result of cloning a template site and can be changed if necessary.

▪ **End User E-Mail Definitions**

o **End User Activation E-Mail Definition (HTML & Text):** This text represents the email a user will receive upon activation. This applies to users whose profile information has been uploaded through a user profile load.

- **Preview Activation E-Mail:** Sends a preview of the email that will be created as a result of the HTML or plain text entered. Enter the recipient email address(es).

- Click **Send** to send the email. The email contains detail of what would be sent to the end user when activation emails are enabled.

deem

4 Test Company

Welcome to Deem

Click below to fill in your Profile information and activate your account so you can begin using Deem   to book all of your travel and business services.

Get started now

Introducing a powerful online tool to find and manage the services you need. It also remembers your preferences, automatically updates your calendar, and notifies you when anything changes.

© 1999-2013 Deem, Inc. All rights reserved. Please contact support@deem.com.

empowered by **deem**

o **End User Registration E-Mail Definitions (HTML & Text):** Currently not in use

o **End User Reminder E-Mail Definitions (HTML & Text):** This text represents the reminder email a user will receive if the user has been activated and has not yet used the application.

End User Reminder E-Mail Definition (HTML)

The text below represents the reminder email a user will receive if the user has been activated and has not used the Application.

Fill in the textbox below to define the **HTML** version of this e-mail. This field will accept HTML formatting.

```
<!DOCTYPE html PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN" "http://www.w3.org/TR/html4/loose.dtd">
<html>
<head>
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
<title></title>
</head>
<body bgcolor="#ffffff" style="font-family:Arial, Helvetica, sans-serif; font-size:11px;">
<table border="0" cellpadding="5" cellspacing="0" width="600">
 <tr>
  <td><table border="0" cellpadding="0" cellspacing="0" width="600">
   <tr>
```

Preview Reminder E-Mail

End User Reminder E-Mail Definition (Text)

The text below represents the email a user will receive if the user has been activated and has not used the Application.

Fill in the textbox below to define the **text** version of this e-mail.

```
LIFE. ONLY EASIER.

Just a friendly reminder that your very own personal assistant is available to help you find, book, and manage the services you need.

------------------------------

To get started, visit the url below:

>>Your site: $registration_url
>>Your username: $username
```

Preview Reminder E-Mail

- **Preview Reminder E-Mail:** Displays a preview of the email that will be created as a result of the HTML or plain text entered.

o **End User Account Password E-Mail Definitions (HTML & Text):** This text represents the email a user will receive upon account password reset.

End User Account Password Reset E-Mail Definition (HTML) *

The text below represents the e-mail user will receive upon account password reset.

Fill in the textbox below to define **HTML** version of this e-mail. This field will accept HTML formatting.

```
<!DOCTYPE html PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN" "http://www.w3.org/TR/html4/loose.dtd">
<html>
<head>
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
<title></title>
</head>
<body bgcolor="#ffffff" style="font-family:Arial, Helvetica, sans-serif; font-size:11px;">
<table border="0" cellpadding="5" cellspacing="0" width="600">
 <tr>
  <td>
   <table border="0" cellpadding="0" cellspacing="0" width="600">
    <tr>
```

Preview Account Password Reset E-Mail

End User Account Password Reset E-Mail Definition (Text) *

The text below represents the e-mail user will receive upon account password reset.

Fill in the textbox below to define the **text** version of this e-mail.

```
As requested, we have provided your account information to sign in to the
$BRANDING_TITLE_NAME

For security reasons, your password has been reset. Please click on the link below where you will be required to establish a new password before gaining access to the site.

----------------------------------------------------

SIGN IN NOW

Your site: $registration_url

Your user name: $username
```

Preview Account Password Reset E-Mail

o **Preview Account Password Reset E-Mail:** Displays a preview of the email that will be created as a result of the text entered. Enter the recipient email address(es).

o Click **Send** to send the email. :

o **Administrator Activation E-Mail Definitions (HTML & Text):** This represents the email an administrator will receive upon activation.

Note: It is recommended the Administrator Email and the End User Activation Email be the same to allow the administrator the ability to see what the end user is receiving.

- **Preview Activation E-Mail:** Displays a preview of the email that will be created as a result of the text entered.

o **Administrator Reminder E-Mail Definitions (HTML & Text):** This text represents the reminder email an administrator will receive if the user has been activated and has not yet used the application.

Note: It is recommended the Administrator Reminder Email and the End User Reminder Email be the same to allow the administrator the ability to see what the end user is receiving.

- **Preview Reminder E-Mail:** Displays a preview of the email that will be created as a result of the text entered.

4. Click **Save** to save the email settings.

5. Click the **Changes not applied** link to commit changes.

3.2.4 Mobile Settings

The **Mobile Settings** link allows customization of mobile phone, PDA upgrade reminders and reauthorization intervals.

To access the **Mobile Settings**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Settings tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Mobile Settings** link.

The **Settings | Mobile Settings** page is displayed.

- o **Upgrade Reminder Interval:** When upgrades become available an email is sent to the users. If no action is taken by the user to upgrade, this field designates the amount of time before a reminder email will be sent.

- o **Reauthorization Interval:** Length of time that passes between logins before reauthorization is required.

- o **Helpdesk Email:** Optional Helpdesk email address that can display on the user's mobile phone. This information generally pre-populates from the super domain.

- o **Helpdesk Email Label:** Optional Helpdesk email name that can be displayed on the user's mobile phone. This information generally pre-populates from the super domain.

- o **Helpdesk 1 Phone** through **Helpdesk 4 Phone:** Optional Helpdesk phone numbers that can display on the user's mobile device.

- o **Helpdesk 1 Phone Label** through **Helpdesk 4 Phone Label:** Optional Helpdesk labels – most often contact names – that can be displayed on the user's mobile device.

- o **Calendar Synch:** Select **Use Super Domain Setting**, **Enabled**, or **Disabled** from the drop down list to allow synchronization of the mobile device to your calendar.

- o **Hotel Booking:** Select **Use Super Domain Setting**, **Enabled**, or **Disabled** from the drop down list to allow hotel bookings to be made on the mobile device.

- o **Blackberry Download Method:** Select **Use Super Domain Setting**, **Deem Site**, **Vendor Store** or **BES Push** from the drop down list to define the method of app download.

- o **Mobile Download Link:** Select **Use Super Domain Setting**, **Turn on Mobile Download Page**, or **Turn off Mobile Download Page** from the drop down list
4. Click **Save** to save the Mobile Settings page.
5. Click the **Changes not applied** link to commit changes.

3.2.5 Password Security

The **Password Security** link allows further customizing of the site by setting limitations on user passwords. These limitations can include password expiration rules, password length requirements and the number of failed sign in attempts permitted before a user ID is locked from the system.

To access **Password Security**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Settings tab permissions.
2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.
3. The **Settings | Overview** page is displayed. Click the **Password Security** link.

The **Settings | Password Security** page is displayed.

- o **Minimum password length:** Enter the minimum length a password must be. It is recommended the password be at least 6 characters in length.

- o **Password expiration:** Enter the number of days a password can be used before it "expires" and needs to be reset. It is recommended a password expire after 90 days.

- o **Password reuse history:** Enter the number of passwords that must be set before a password can be reused. It is recommended that 3 unique passwords be established before one can be reused.

- o **Maximum sign-in attempts:** Enter the number of failed log in attempts allowed before a user is locked from trying again. It is recommended this number be between 5 and 10 attempts.

- o **User Lockout time:** Once a user has been locked out of the system due to exceeding the maximum failed log in attempts, this is the amount of time that must pass before the user will automatically be allowed to retry without administrator intervention. It is recommended to use this option with caution.

- o **Prohibit the use of common words in passwords:** This checkbox will prohibit the use of any words found in the dictionary from being used. Example: password is prohibited, but passw0rd is permitted. It is recommended this option be used for added security.

- o **Force passwords to contain at least one letter and one number:** This checkbox will force passwords to contain at least one letter and one number within them. It is recommended this option be used for added security.

- o **Activate "Remember Me" feature:** This checkbox will allow the user to check the "Remember Me" box on the log-in page which stores their username for future use.

- o **Enable secret question and answer for password reset:** Selecting this checkbox enables the secret question functionality when a user has forgotten their password and requests it to be reset.

Note: The following is the list of currently available secret questions. No additional questions can be added. As part of user registration, the user will be asked to select a question and provide their answer which is validated upon password reset.

- Password security questions:
    - Your favorite sport or hobby?
    - Your childhood pet's name?
    - Where was your mother born?
    - Your mother's maiden name?
    - Who was your favorite teacher?
    - What was your first school?
    - Where were you born?
    - What is your date of birth?
    - Your favorite city or place?

4. Click **Save** to save the password security setting.
5. Click the **Changes not applied** link to commit changes.

3.2.6 Home Page Options

In **Home Page Options** configure custom messaging to appear on the Deem Home Page.

To access the **Home Page Options**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Settings tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Home Page Options** link.

The **Homepage Options** page is displayed.

- o **Custom Services Message:** Custom messaging can be entered that will appear under the "Company News" area of the Home Page.

Note: A maximum of 2000 characters may be entered in the message. It is a best practice, however to limit the number entered to assure end users will read the message.

- o **Additional Resource Links:** At site creation, default links are provided to allow pages outside of the Deem application to be accessed while remaining signed into the application. Links can be removed, additional links can be added and the URL's can be changed. Intranet links can also be used.

4. Click **Save** to save the Home Page Options settings.

5. Click the **Changes not applied** link to commit changes.

3.2.7 Profile Field Settings

The **Profile Field Settings** link allows a site administrator to customize the field names and field properties for the site. Fields can be made to appear to be hidden or displayed and / or required according to specific client business requirements.

To access the **Profile Field Settings:**

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Settings tab permissions.

2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.

3. The **Settings | Overview** page is displayed. Click the **Profile Field Settings** link.

4. The **Settings | User Profile Fields** page is displayed.

3.2.7.1 Standard Profile Fields

1. Click the **Configure Profile Fields** link to access the standard profile field definitions.

2. The **Settings | Configure** page is displayed:

- o The page is divided into eight "columns":
  - Field Name: The field name as it is referred to within Deem database
  - Display Label: The words used to present the field to the end user on Deem pages
  - Data Source: The source of the data – the result of a data feed or online edit.
    - Profile Load: The field can be populated with a profile load

      All Users: When a profile load is performed, the data found in the upload file will overwrite any existing data in this field for existing user. It is recommended this radio button not be selected.

      New Users Only: When a profile load is performed, the data found in the upload file will only write to this field for new users. It will not overwrite any existing data in this field for existing user. It is recommended this radio button be selected.

    - User Editable: Can the user change the field?

    - Agent Editable: Can an Agent change the field?

    - Admin Editable: Can an Administrator change the field?
  - Display in Settings: Select this check box if the field is to be visible to the end user in their online profile.
  - Display in Registration: Select this check box if the field is visible during user registration.
  - Required field for user: Select this check box if the field is required.
  - Display in Settings For Guests: Select this checkbox if the field will be visible to the guest end user in their online profile.

- **Required Field For Guest Users:** Select this check box if the field is required for guest users.

Note: If a field is required, be sure to also select the Display check box to allow its display.

- o **Personal Information:**

External ID	User Name
Title	First Name
Middle Name	Last Name
Home Phone	Home Email
Date of Birth	Suffix
VIP Status	Profile Pin
Gender	View Results By
Default Search Type	

- o **Contact Information:**

Business Email	Business Phone
Business Fax	Mobile Phone
Groupware ID	

- o **Employee Information:**

Employee ID	Employee Status
Employee Type	Job Title
Job Level	Manager ID
Delegate ID	Approver ID
Shopping Approver ID	Travel Approver ID
Cost Center	Department Code
Department Name	Division
Business Unit	Company Name
MIS Fields 1 - 7	

- o **Business Address:**

Country	Address Block
Mailstop	

- o **Home Address:**

Country	Address Block
Mailstop	

- o **Passports:**

  Passports

- o **Visas:**

  Visas

- o **Emergency Contact:**

Name	Relationship
Primary Phone Number	Secondary Phone Number
Email	Country
Address Block	Emergency Mailstop

o **Payment Cards:**

Personal Cards	Corporate Cards

o **Travel Preferences:**

Default Air Card	Default Hotel Card
Home Airport	Meal
Seats	Special Requests
Airline Memberships	Special Requests
Special Requests	Transmission
Car Type	Number of Doors
Car Memberships	Hotel Amenities
Hotel Memberships	Preferred Fare Type
Default Car Card	Seats Second Preference
Note to Travel Arranger	Display Alert
Home Train Station	Membership Number
Redress	Known Traveler Number
Preferred Service Class	Train Default Search Type

o **Travel Account (for Non-Deem Travel):** Currently not in use.

o **National Identification Info:**

National ID Information

o **Display Settings:**

Date	Time
Time Zone	Measurement
Currency	Country

o **Roles:**

Roles

3. Click **Save** to save the user profile configuration settings.   The **User Profile Fields** page is redisplayed.

3.2.7.2 Customize Standard Profile Fields

Note: Field labels are changed on the Configure Profile Fields page. Field types (List / Text) are changed on the Customize Profile Fields page.

1. Customize how several profile fields commonly used for reporting are defined by clicking the **Customize Profile Fields** link. The **Settings | Customize** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to User Profile Fields

Settings | Customize

Customizable Profile Fields

Field Name	Display Label	Field Type	Last Update	Action
Business Unit	BUN	--	--	Clear
Company Name	Company Name	--	--	Clear
Cost Center	Cost Center	--	--	Clear
Department Code	Department Code	--	--	Clear
Department Name	Department Name	--	--	Clear
Division	Division	--	--	Clear
Employee Type	Employee Type	List	January 2, 2009	Clear
MIS Field 1	Zone	--	--	Clear
MIS Field 2	MIS Field 2	--	--	Clear
MIS Field 3	MIS Field 3	--	--	Clear
MIS Field 4	MIS Field 4	--	--	Clear
MIS Field 5	MIS Field 5	--	--	Clear
MIS Field 6	MIS Field 6	--	--	Clear
MIS Field 7	MIS Field 7	--	--	Clear
Job Level	Job Level	--	--	Clear
Suffix		--	--	Clear

Done

2. By clicking the Field Name link, display options for several standard fields can be defined. The page is displayed. In this example, we are looking at the MIS Field which has been defined as a Text field.

- o **Customize Field: Field Information:**
  - ▪ <u>Name:</u> The field name as it is referred to within Deem database. This field cannot be changed here. Changes to this field are not made here. They are made within the Configure Profile Fields function.
  - ▪ <u>Label:</u> The words used to present the field to the end user on Deem pages. This field cannot be changed here. Changes to this field are not made here. They are made within the Configure Profile Fields function.

Note: These fields cannot be changed here. To change the name and or label, click the Profile Setting link.

- o **Field Type:** Specify if the field is to be <u>Text</u> (The field is displayed as free form text) or <u>List</u> (The field will have a drop down list)
  - ▪ <u>Display in Settings: :</u> Select this check box if the field is to be visible to the end user in their online profile. Changes to this field are not made here. They are made within the Configure Profile Fields function.
  - ▪ <u>Display in Registration:</u> Select this check box if the field is visible during user registration. Changes to this field are not made here. They are made within the Configure Profile Fields function.
  - ▪ <u>Required Field:</u> Select this check box if the field is required. Changes to this field are not made here. They are made within the Configure Profile Fields function.
- o **Field Type Preference: TEXT:** When the Field Type is set to Text, the following options are displayed:
  - ▪ <u>Min Length:</u> If the field is specified as required, the value of 1 or greater must be entered as the minimum length.
  - ▪ <u>Max. Length:</u> The value must be equal to or greater than the minimum length set above.

- **Allowed Characters:** Specify if alphabetic, numeric and / or special characters are allowed.

- **Default Value:** Specify a default value, if one applies.

o **Field Type Preference: LIST:** When the Field Type is set to List, the following options are displayed:

- **Option Labels and Values:** Enter the list items to be displayed

- **Sort labels alphabetically:** Select the checkbox to alphabetize the list.   The list will be displayed exactly as entered if the checkbox is not selected.

- **Default:** Select from the list what the default value is to be when the page is first presented.

  - Select first value as default:

  - Select value prefixed with "*" as default. Select one of the list items as the default by adding an asterisk before the selection. i.e. *None would place "None" as the default regardless of list alphabetizing or not.

  - Select no value as default.

3. Click **Save** to save the Profile Field settings.

4. Click the **Changes not applied** link to commit changes.

3.3 The Services Tab

3.4 Agency Configuration

When a site is cloned from a template, Agency Configuration settings are cloned too. Most settings can remain the same as those found on the template, but some may need to be adjusted depending on the individual site's requirements.

1. Click the **Services** tab
2. The **Services | Travel** page opens. Click the **Travel Agency** link.

3. The **Services | Agency Configuration** page opens. Click the **Agency Settings** link.

3.4.1 Agency Settings

Agency specific configuration includes the agency's PCC, pricing codes and several other agency specific settings.

1. The **Services | Agency Settings** page opens. Click **Add A New Agency Setting** to add a new record, or click the name link of an existing agency setting record to edit that record. The **Services | Edit** or **Add Agency Setting** page is displayed.

Note: If the site has been cloned, many of these settings will already be in place. Adjustments may only be needed to the agency settings.

- **Agency Configuration Settings:**

- ○ **Setting Name:** (Required) Name the agency configuration. This name should be easily recognizable as a specific agency configuration. An example is *Sabre Config* to show that this one uses Sabre vs. Worldspan. Other examples of the need for additional agency configurations are different PNR edits, different Pseudo cities or queue delivery options.

- **Host Information:**

- ○ **GDS:** (Required) Select the Global Distribution System from the drop down list.

- o **TA Groups:** (Required) Terminal Address: Must be set to *ExternalSabreNew* for Sabre, (*ExternalSabre* is an old setting) *ExternalApollo* for Apollo, *ExternalGalileo* for Galileo or *ExternalWorldspan* for Worldspan.
- o **Pseudo-City Code:** (Required) Enter the agency's pseudo-city code.
- o **Default Queue:** (Required) Enter the queue to use as a default. This queue can be changed for more specific queue delivery
- o **Sales Location:** (Required) Enter the airport code associated with the agency's pseudo-city used for faring with ITA.
- o **Ticketing TA Group:** Used with void / exchange feature
- o **Ticket Printer Address:** Used if void / exchange feature is enabled
- o **Itinerary / Invoice Printer Address:** Used with void / exchange feature
- o **Hardcopy Printer Address:** Used with void / exchange feature

Note: Enter a ticket and Support will help configure our void / exchange feature

- o **Ancillary Sources:** Click the **Add Ancillary Source** link to add a source. The **Add Ancillary Source** page is displayed. Once the Source has been selected from the drop down list, the remainder of the page will display.

Note: An Ancillary Sourced provider is one that does not use ITA as their fare / availability provider

- - **Source Name:** (Required) Enter the ITA non-participating carrier. (ITA is our shopping and booking tool) GDS or TravelFusion are used to source these carriers. Examples: Southwest (GDS directly) or BMI Baby (TravelFusion).
- - **Source:** (Required) Select GDS – Apollo, GDS – Galileo, GDS – Sabre, GDS – Worldspan, or Web – TravelFusion from the drop down list.

Note: Other options may be available depending on your site's configuration.

- **TA Group:** Select the appropriate TA Group from the drop down list
- **Pseudo City Code:** Provide the Pseudo City Code
- **Default Queue:** Provide a queue if appropriate
- **Segment Type:** Select *Flights, Hotels,* or *Rental Cars* from the drop down list.
- **Limit to These Vendors:** Enter a list of vendors separated by commas.
- **Use one-way low fare search requests for round trip and multi-city flight searches:** Select this check box if the same search parameters will be used for a round trip or multi-city search that were used for this leg. Best practice is to use one-way low fare search requests.
- **Airline Private Rate Codes:** Enter any appropriate Private Rate Codes.
- **Source Override:** Select *Replace Primary Source Content, Supplement Primary Source Content* or *Exclude Primary Source Content.*
- **Would you like the system to add ancillary passive segments to your primary GDS?** Select *Yes, using Custom PNR, Yes, system generated,* or *No, do not add passive segments to primary GDS*

Note: It is recommended to select either *Yes, system generated*, or *No, do not add passive segments to primary GDS.*

Note: If Source: WEB: TRAVEL fusion is selected, only "Airline", "Source Override" and "Would you like the system to add ancillary passive segments to your primary GDS fields" are displayed.

Airlines supported include: Aer Arann, Aer Lingus, Air One, Allegiant Air, Azul, bmibaby, Eastern Airways, easyJet, Flybe, Germanwings, Interjet, Jet2, JetBlue, Manx2, Monarch Airlines, Norwegian, Ryanair, TUIfly, Volaris and Wizz Air.

- o   Click **Save** to save the entry. The **Services | Add** (or **Edit**) **Agency Setting** page is redisplayed.

- **Agency Information:**

- o   **Agency Name:** (Required) Enter the agency name. Be careful to not exceed 30 characters.
- o   **ARC Number:** (Required) Enter the agency ARC number.

- o **Hotel ARC Number:** Enter the agency hotel ARC number.
- o **Rental Car ARC Number:** Enter the agency rental car ARC number.
- o **IATA Number:** (Required) Enter the agency IATA number.

Note: The IATA number should not include alpha or special characters.

- o **Country:** Enter the agency country.
- o **Street Address:** Enter the agency street address.
- o **Apartment / Suite:** Enter the agency apartment or suite number.
- o **City:** Enter the agency city.
- o **State:** Enter the agency state.
- o **Zip code:** Enter the agency zip code.
- o **Time Zone:** (Required) Enter the agency time zone used for ticketing cancelation.

- • **Agency Contact:**

  - o **Name:** (Required) Enter the contact name. This name will display on the Trip Confirmation Page and print on the trip's itinerary.
  - o **Title:** (Required) Enter the contact title. This information is used by Deem internal personnel for reference only.
  - o **Phone:** (Required) Enter the contact phone number. This phone number will display on the Trip Confirmation Page and print on the trip's itinerary.
  - o **Toll-Free Phone:** Enter the contact toll free phone number. This phone number will display on the Trip Confirmation Page and print on the trip's itinerary.
  - o **Email:** (Required) Enter the contact email address. This information is used by Deem internal personnel for reference only.

- • **Message to Users** (Optional):

- o **Text box provided:** Enter a message to display to users on the Purchase Page, Confirmation Page, Trip Detail Page, e-Receipt, Trip Notifications, and Calendar Entries. Do not use HTML tags or Travel lingo.
- o **Enable confirmation notifications from *site name*:** Click this checkbox to enable email confirmations to be sent from this site.

Note: It is **Recommended** this checkbox be selected.

- • **Domestic Definition:**

o   Select the countries that define domestic travel and click **Add** to move them to the **Selected Countries** box. These countries will fall under the domestic travel requirements. All others will be considered International.

Note: Search results windows and Queue Delivery Options may differ depending on the domestic / international designation.

- **PNR Configuration:**

o   **Booking Configuration:** Select a PNR edit configuration from the drop down list for this agency. This identifies what PNR edit sets to use for this agency configuration.

o **PNR Synchronization Settings:** Add the GDS to use for PNR synchronization. Click the **Add Synchronization Settings** link. The **Services | Add PNR Synchronization** page is displayed.

Note: It is recommended PNR Synchronization be enabled for ONE SITE only if all properties are the same across the sites. Enabling PNR synchronization on multiple sites adds unnecessary GDS churn.

- **Acquire off-line PNR's:** Select the checkbox to acquire off-line PNR's.
- **Select the GDS:** Select the GDS from the drop down list
- **TA Group:** Must be set to *ExternalSabreNew* for Sabre, (*ExternalSabre* is an old setting) *ExternalApollo* for Apollo, *ExternalGalileo* for Galileo or *ExternalWorldspan* for Worldspan.

- **Acquisition Queues:**
    - **Enter the Pseudo-city where PNR's are to be acquired:** Enter the pseudo-city code
    - **Enter the queue where off-line PNR's are placed for acquisition:** Enter the first queue to use for off-line PNR's.
    - **Enter the Pseudo-city where PNR's are to be processed if different from above:** Enter the pseudo-city code to use for processing if different from acquisition pseudo-city.
    - **Enter the first queue where off-line PNR's are to be processed:** Enter the first queue to use for off-line PNR processing.
    - **Enter the second queue where off-line PNR's are to be processed:** Enter the second queue to use for off-line PNR processing.
- **Acquisition Failure Queue:**
    - **Enter the pseudo-city for the queue where PNR's that fail acquisition are placed, if different from the acquisition pseudo-city:** Enter the pseudo-city to use for failed synch requests.
    - **Enter the queue (with queue action if appropriate) where off-line PNR's that fail acquisition are placed:** Enter the queue to use for failed synch requests.

Note: It is the responsibility of the agency to monitor failed acquisitions.

- **Owner Identification:**
    - **Select the method used to look up the owner of a PNR:** This is set during implementation and there is no need to change. It is a Best Practice to use "Unique Identifier".

        If "Unique Identifier" or "Login Name" were selected, an additional text box is displayed.

        > **Enter prefatory remarks that precede the traveler's _____ in the PNR.**

- **Hours of Operation:** Our scripts run every hour on the half hour. If scripts are to run more or less frequently or at a different time configure the timing here.
    - **Select the hours of operation for this PNR synchronization configuration:** Select Always On or Specific Hours and then define the hours of operation.
    - **Select how frequently PNR synchronization should be attempted:** Select the frequency to use for synchronization.

Note: Please remember that each time PNR synchronization is triggered there are GDS hits and this can incur charges. We recommend setting the interval to no more than every 60 minutes.

Note: When an error occurs during PNR synchronization, a Passive segment can be created, depending on if passive segments were enabled during the Agency Display Configuration.

- **Passive Segment Processing:** Not used very often. If passive segments are used, Deem Configuration Team can assist in creating this JavaScript.

- o **Passive Car Segments:** No longer used.
- o **Passive Hotel Segments:**
  - **Enter a JavaScript that will construct the GDS command to sell a passive hotel segment:** When passive segments are enabled, JavaScript entered here is used to process the passive segment.
  - **Enter a JavaScript that will parse the variable portion of a passive hotel segment:** If an error occurs during PNR synch due to agency unique requirements, enter JavaScript here that re-write the script for the PNR to succeed.

- **Travel Settings:**

- o **Enter the default passenger type code to be used for air pricing:**
  - **Customer Code:** (blank is "ADT") If not code is entered, the default is Adult.
- **Negotiated Rates**
  - o **Enter the customer code that is used to query for airline negotiated rates in the GDS:** This code will be sent to the GDS to retrieve the negotiated rates.

- o **Enter the ATPCO account codes that are used to query for airline negotiated rates from ITA:** This code will be sent to ITA to retrieve the negotiated rates.
- o **Specify the locales associated with the ATPCO account codes:**
  - - **Pseudo City Locale: Sales or Home.** Generally Sales is selected.
  - - **IATA Locale: Sales or Home.** Generally Sales is selected.
- • **Train Support:**

Note: To enable VIARail in Canada, complete the **Train Support** section as you would for US's Amtrak. However, the **Sales Location** found at the top of the **Agency Settings** page must be a Canadian airport code.

- o **Channel:** Enter the SilverRail supplied Channel code. (AXIOM, REARDEN or TVLPORT if the site is not using a site card. AXIOMSC, REARDENSC or TVLPORTSC if using a site card.). Must be all caps.
- o **Agency Identifier:** Enter the SilverRail supplied Agency Identifier. Must be all caps.
- o **Customer Identifier:** Enter the SilverRail supplied Customer Identifier. Must be all caps. This identifier defines a specific customer and should be created during implementation. The field is used for reporting only.
- o **Client ID Number:** Enter the number to be used when optional reporting is required.
- o **Customer DK Number:** Enter the number to be used when optional reporting is needed.
- ▪ Amtrak Specific Support:
  - o **Add passive train segment to primary GDS?:** Yes or No.

- o **Message for Train support procedure and phone numbers:** Enter the message to be displayed to the traveler on the purchase page and on confirmation messages. Do not include HTML tags or travel lingo.
- o **Train support phone number for mobile client:** Enter the phone number to be displayed in the mobile client if the number is different from other support numbers
  - ▪ **ATOC(UK) Specific Support:**
    - o **Message for Train support procedure and phone numbers:** Enter the message to be displayed to the traveler on the purchase page and on confirmation messages. Do not include HTML tags or travel lingo.
    - o **Train support phone number for mobile client:** Enter the phone number to be displayed in the mobile client if the number is different from other support numbers.
- • **Queue / Delivery Options**
  - o **Options Set:** (Required) Select the pre-defined Queue / Delivery Options Set for PNR (for ticketing, invoice, etc.) processing.
- • **Pre-Trip approval settings:** Click the **Add PTA Configuration** link to access Pre-trip approval settings.

Note: For more information about PTA, please contact your Account Success or Sales Manager.

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2. Click **Save** to save the changes. Click the **"_ changes not applied"** link to commit the changes.
3. The changes made since the last time a commit was done are displayed. Click the **Commit** button to commit the changes to the database.
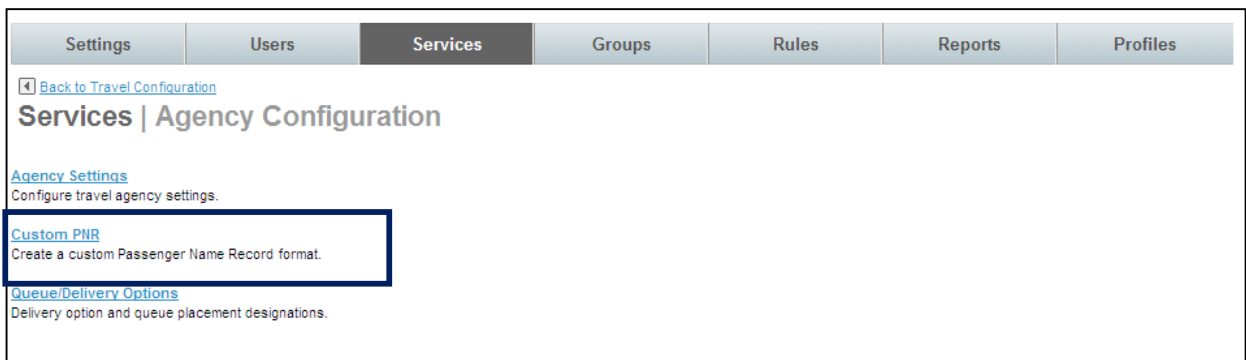
3.4.2 Custom PNR

Custom PNR string edits are performed to complete the GDS reservation. This allows the PNR to be sent to GDS with very little agency touch. The configuration can contain basic information like adding a cost center to a name field or can be more complex, like documentation for ticket exchanges. In general, custom PNR strings are created by the Deem configuration team during the site implementation process. Modification to PNR strings are the responsibility of the client, however, Deem is available to assist in any needed changes.

To determine which PNR edit strings are needed, Deem studies a typical agency booking and attempts to duplicate standard entries. This could include UDIDs, specialized cost savings documentation and variable credit cards options based on departmental requirements.

To access the PNR string edits:

1. Click the **Services** tab. The **Services | Travel** page is displayed.
   a. Click the Travel **Agency** link. The **Services | Agency Configuration** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◄ Back to Travel Configuration

Services | Agency Configuration

Agency Settings
Configure travel agency settings.

Custom PNR
Create a custom Passenger Name Record format.

Queue/Delivery Options
Delivery option and queue placement designations.

b. Click the Custom PNR link. The Services | Custom PNR Configurations page is displayed. Click the link below a **Set Name** to view the configuration or click the **Add a New PNR Configuration** to add a new one.

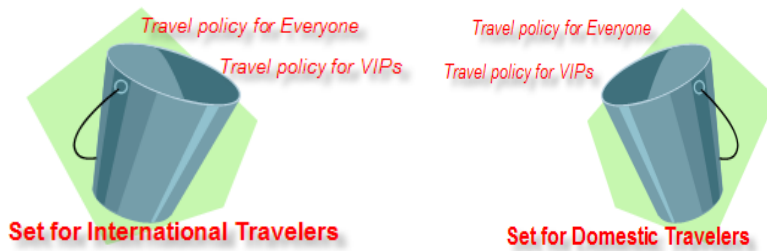c. The **Services | Add** (or **Edit**) **PNR Configurations** page is displayed.

3.4.3 Lists and Sets

The List and Set structure is used throughout the Deem Dashboard.

Using travel policy as an example, a **List** could be the policy set up for the general population of travelers. A second list could be the policy set up for VIP travelers and so on.

A **Set** is a holder, or a "bucket", into which related lists can be placed. Continuing with the travel policy example, the two lists mentioned (general population travelers and VIP travelers) could be placed in a Set titled Domestic Travelers. If travel policies were then created for internationally based travelers, a set could be created to hold those lists.

Once details have been defined (the list), add them to the holder (set) for use when configuring travel policy. In the dashboard a link for Lists and Sets will be seen under many of the Services functions.
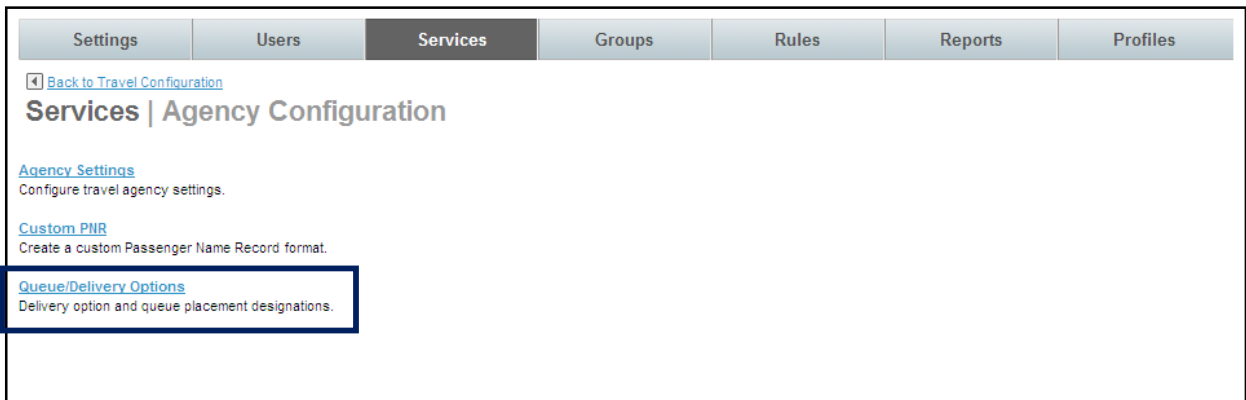

3.4.4 Queue and Delivery Options

Once the PNR is complete, the record must be sent to a queue for processing. It can be sent to the default queue set up on the Agency Configuration, or there can be a different queue set up in this link.

A separate list must be created for each unique delivery requirement. An example is where an airport requires a paper ticket. A list specific to this requirement must be created.
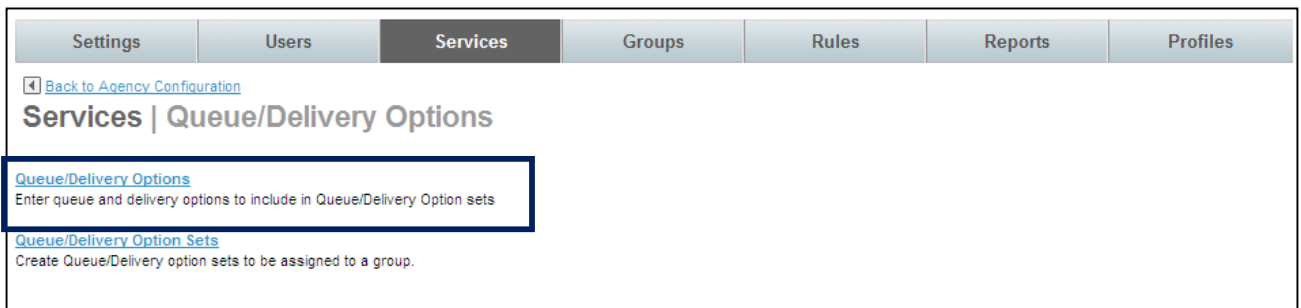
1. From the **Services** tab click the **Travel Agency** link. The **Services | Agency Configuration** page opens.

2. Click the **Queue / Delivery Options** link. The **Services | Queue / Delivery Options** page is displayed.

3. Click the **Queue / Delivery Options** link.

3.4.4.1 Queue / Delivery Options List Items

Note: **Queue / Delivery Options** follow the **List and Set** structure discussed earlier. First we will look at the List of options.

1. The **Services | Queue / Delivery Options** page is displayed.

Note: A PNR must meet ALL of the conditions outlined in queue / delivery options

2. Click the **Add Queue / Delivery Option** link to add a new option, or click the name link to edit an existing one. The **Services | Add** (or **Edit**) **Queue / Delivery Options** page is displayed.

3. Complete the page:

- Queue Delivery Options
    - o **Record Name:** Enter a record name that will be easily recognizable for the queue.
- **Record Type:** Select at least one record type: *New, Change, Cancel,* or *Tentative*. This is the type of PNR that the queue delivery option applies to.
- **Conditions:** Set the requirements that must be met by a PNR before the PNR will be placed in this queue.

- o **Itinerary Type Conditions:** Select either *All itineraries* or *Selected itineraries*. If *Selected itineraries* is chosen, select the itinerary guideline(s) such as *Itineraries with air segments* - from the drop down list. Multiple guidelines may be selected by using the control key. Select one or more from the drop down list:
  - – Itineraries with at least one international segment
  - – Itineraries with no international segments
  - – Itineraries with a car segment
  - – Itineraries with a hotel segment
  - – Itineraries with a private rate hotel
  - – Itineraries with passive segments
  - – Itineraries with hotel only
  - – Itineraries with car only
  - – Itineraries with car and hotel only
  - – Itineraries with rail segments
  - – Itineraries with air segments
- o **Vendor Conditions:**

- Select either *All airlines* or *Selected airlines*. If *Selected airlines* was chosen, select the airline(s) from the drop down list. Multiple airlines may be selected by using the control key.
- Also choose how the airline participates in the itineraries.
    - **Airline supports e-tickets:** Select *Yes, No* or *Not Applicable*
    - **Select one or more matching airline class of service:** Select the class of service from the drop down list. Choose more than one class by holding down the control key.
    - **Select one or more car companies that must be included in the itinerary:** Select the car company from the drop down list. Choose more than one by holding down the control key.
    - **Select one or more hotel chains that must be included in the itinerary:** Select the hotel chain from the drop down list. Choose more than one by holding down the control key.
- o **Date / Time Conditions:**
    - **Select a ticketing deadline** from the drop down list. *None, Any day after tomorrow, Today* or *Tomorrow.*
    - **Select a booking date / time range that should be used for itinerary evaluation** from the drop down lists.
    - **Select the airline flight departure, hotel check-in or rental car pickup date / time range that should be used for itinerary evaluation** from the drop down lists.
    - **Select the time range that the booking date must match that is prior to flight departure, hotel check-in or rental car pick-up** from the drop down lists.
- o **Departure Conditions:**

- **Enter one or more comma separated airport codes from which the itinerary must depart to be used for evaluation:** Enter the airport code(s). Multiple airports may be selected by using the control key.
- **Select one or more US states from which the itinerary must depart to be used for evaluation:** Select the state(s) from the drop down list. Choose multiple states by using the control key.
- **Select one or more country from which the itinerary must depart to be used for evaluation:** Select the country from the drop down list. Choose multiple countries by using the control key.

o **Return Conditions:**
- **Enter one or more comma separated airport codes from which the itinerary must return to be used for evaluation:** Enter the airport code(s). Choose multiple airports by using the control key.
- **Select one or more US states from which the itinerary must return to be used for evaluation:** Select the state(s) from the drop down list. Select multiple states by using the control key.
- **Select one or more country from which the itinerary must return to be used for evaluation:** Select the country from the drop down list. Select multiple countries by using the control key.

o **Other Conditions:**

- **Does the matching itinerary contain a ticket with any refundable value**: Select *Yes, No* or *Not Applicable.*
- **Is an unused ticket being recommended for exchange:** Select *Yes, No* or *Not Applicable.*
- **If a ticket is being voided:** Select *Yes, No* or *Not Applicable.*
- **Does the matching itinerary contain Special Handling Instructions**: Select *Yes, No* or *Not Applicable.*
- **Does the record contain multiple passengers**: Select *Yes, No* or *Not Applicable.*
- **Enter the GDS price variance that must be exceeded for matching itineraries:** Enter the price variance and select a unit of measure from the drop down list.
- **Create a custom script:** Enter a custom script to define the requirement for this queue. The Deem Configuration Team can help with this.

- **Actions:** The following actions will take place if ALL the above conditions are met:

- **Allow matches to other records:** Select *Yes* or *No.* Is a PNR allowed to go to more than one queue? If *Yes* is selected, the PNR will go to other queues. If *No* is selected, the PNR will go to the most restrictive queue.
    - **Enter the PCC and Queue where the matched booking record should be placed:** Enter a pseudo city code and queue name.
    - **Place matched booking records on both the assigned and default PCC/Queue:** Select *Yes* or *No.* The default queue is the queue assigned on the Agency Settings page.
    - **Enter the delivery option(s) that should be displayed to traveler on the Trip Purchase page if the itinerary matches:** Enter text that does not include travel lingo or HTML tags.
    - **Show delivery address information with above delivery options:** Select *Yes* or *No.* An *example* of when a delivery address is needed would be for a paper ticket.

4. Click the **Save** button to save the configuration. The **Services | Queue / Delivery Options** page is redisplayed. Click the **Back to Queue / Delivery Options** link at the top of the page. (NOT the browser Back button)

3.4.4.2 Queue / Delivery Options Sets

Note: Next, add the **List** (queue policy detail) to a **Set.**

1. Click the **Queue / Delivery Option Sets** link. The **Services | Queue / Delivery Option Sets** page is displayed.

2. Click the **Add Queue / Delivery Options Set** link or select a set name to add a List to an existing set. The **Services | Add Queue / Delivery Option Sets** page is displayed.

3. Enter a **Set Name** and click the **Add Option** button to add list items to the set. The **Services | Search & Add Queue / Delivery Options** page is displayed.

4. Select a list item by clicking the radio button beside it and clicking the **OK** button if only one list is to be added to the set or the **OK & Add Another** button to add this one list and then another one to the set. Repeat this step for each item to be added. When selection of lists to add to the set has been completed, click the **OK** button.

5. Click **Save** to save the set. Click the **"_ changes not applied"** link to commit the changes.

6. The changes made since the last time a commit was done are displayed. Click the **Commit** button to commit the changes to the database.