



301 Howard Street, 21st Floor 415.590.8300 TEL  
San Francisco, CA 94105 415.590.8301 FAX

# **Deem Travel: Partner Dashboard Training**

## **Module One – Roles and Responsibilities of Administrators:**

### **Managing the Super Domain Tabs**

**Sites Tab**

**Administrators Tab**

**Groups Tab**

### **Managing Site Tabs**

**Users Tab**

**Settings Tab**

**(Version 17, October 19, 2015 Series)**

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# 1 Module Series 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 module are designed to stand alone so if necessary, some of the modules 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 module.

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 Pre-Deployment Responsibilities for a Site Administrator:

Prior to the deployment of a site, the Site Administrator already plays a key role.

Their responsibilities include:

- Attend all applicable certification training courses / provide feedback on documentation provided – including Basic and Advanced Studies
- Complete initial data files (see [Data File Management](#))
- Thoroughly test all configuration settings of the cloning template
- Sign off acceptance of the cloning template
- Attend all support hand-off calls and complete the Support Hand-off form
- Provide the names and email addresses for personnel who will be given access to the Partner Marketplace to view upcoming events and to the Support Portal where they can manage issues
- Provide email address to be used for educational event and other informational emails

#### 2.1.2 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.

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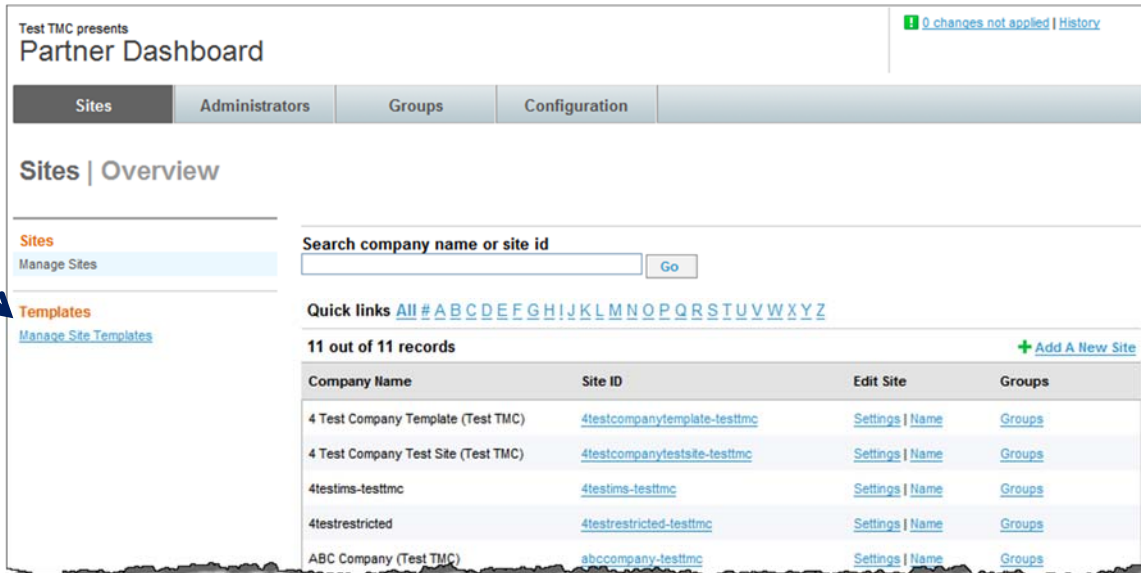
**Note:** The template should be created from a non-transacting site.

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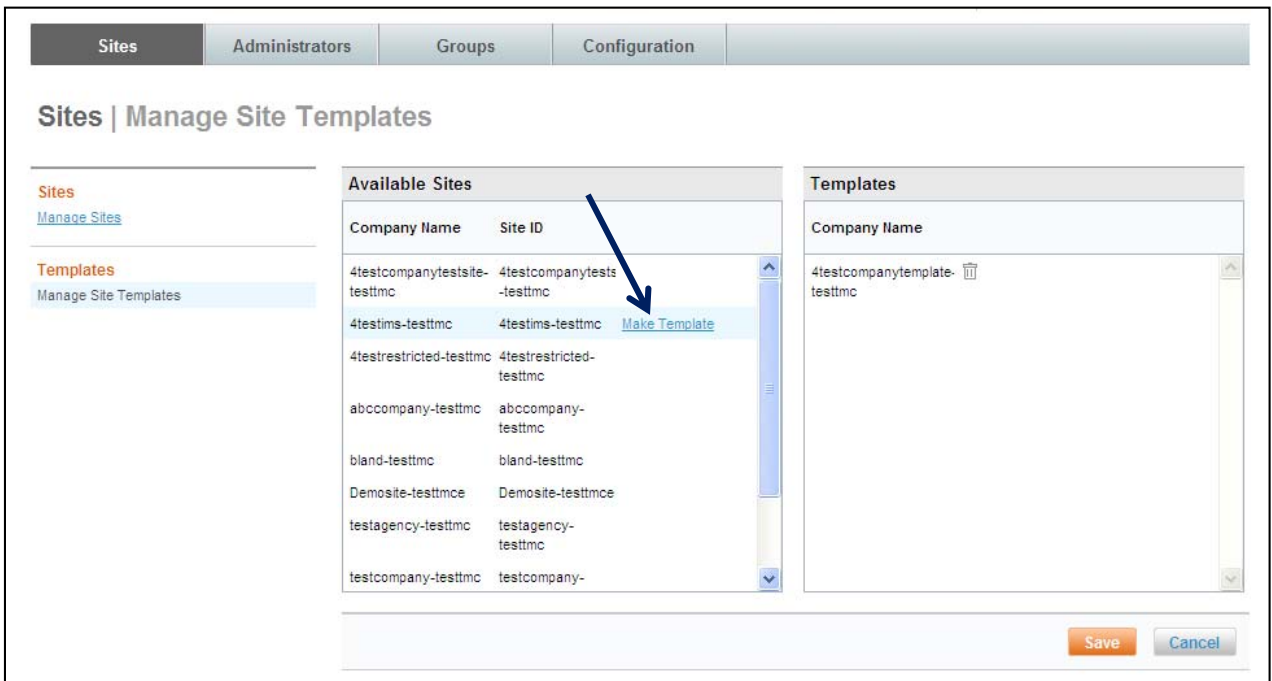
##### **To Identify a Site as a Template Site**

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

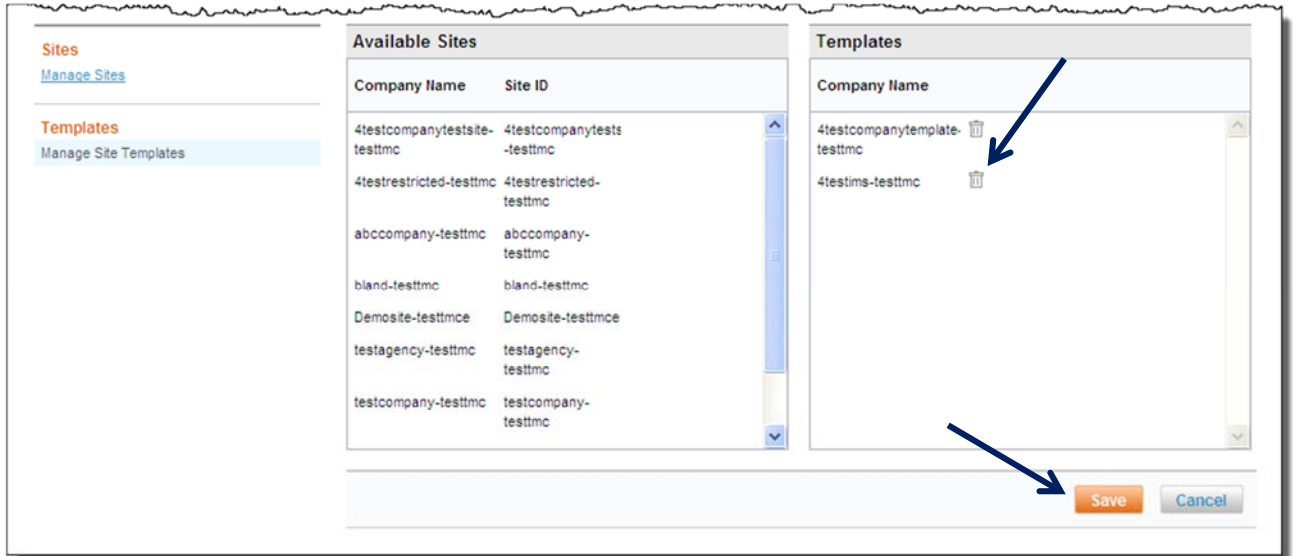
2. Click the **Manage Site Templates** link found on the left side of the page.



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.



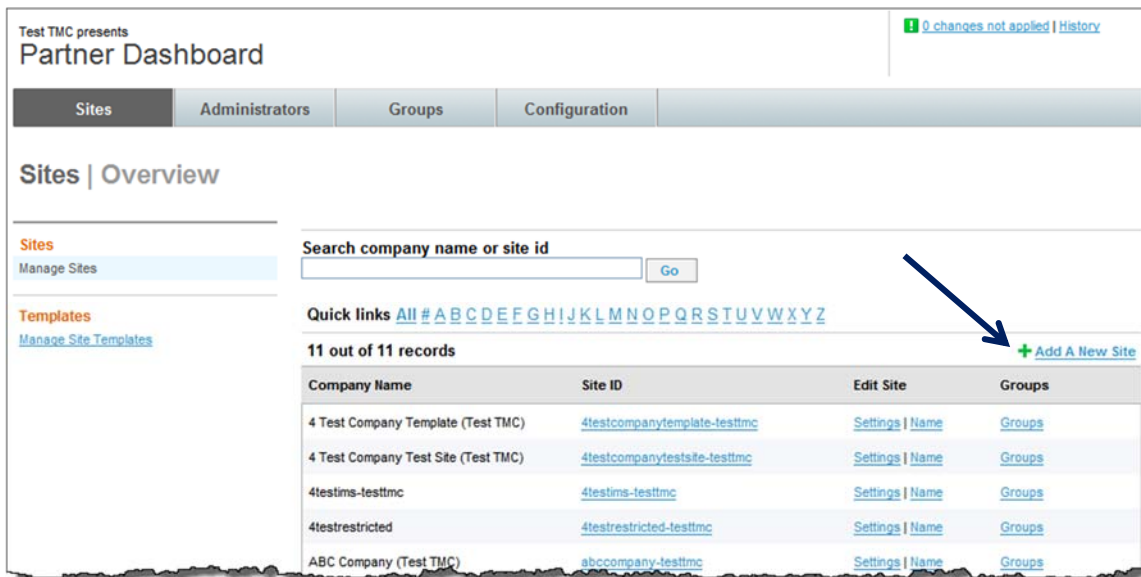
- The site is moved to the right box and identified as a **Template**. Click the **Save** button to save the change. Click the trash can beside a site to remove the site from the templates drop down list.



**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.

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

The page is divided into 3 sections:

- **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)*



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

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**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.

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

- **Website URL:** Enter your company's URL. This is not commonly used.
- **Phone number:** (Required) Enter the client phone number.
- **Country:** (Required) Select the Country from the drop down list where the account is located.

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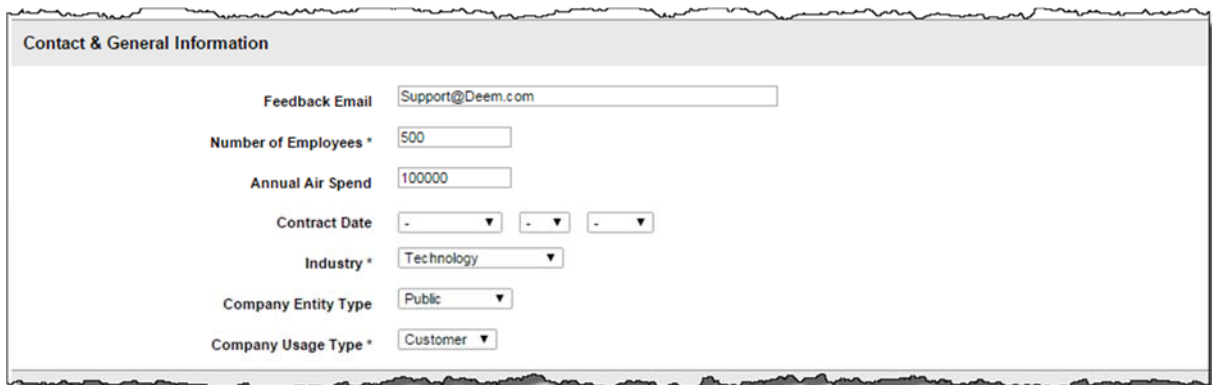
**Note:** The Country selected will determine the address lines provided.

- **Street Address 1:** (Required) Enter the first line of the client's address.
- **Street Address 2:** Enter the second line of the client's address.
- **City:** (Required) Enter the city of the client's address.
- **State / Province:** Enter the state or province of the client's address.
- **Postal code:** (Required) Enter the ZIP or postal code of the client's address.
- **Currency:** (Required) Select the Currency from the drop down list for the client.
- **Tier:** Select **ENT** from the drop down list.

- **The Contact & General Information:**

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



The screenshot shows a form titled "Contact & General Information" with the following fields and values:

- Feedback Email: Support@Deem.com
- Number of Employees \*: 500
- Annual Air Spend: 100000
- Contract Date: - - -
- Industry \*: Technology
- Company Entity Type: Public
- Company Usage Type \*: Customer

- **Feedback Email:** This address is displayed to the end user as an email address to which to send any Deem feedback.
- **Number of Employees:** (Required) Enter an estimate of the total number of employees who may use Deem at this agency or company.
- **Annual Air Spend:** Enter an estimate of the annual amount spent on air travel.

- **Contract Date:** Select the date of the agency or company’s contract. This is used for statistics only.
- **Industry:** (Required) Select the company’s industry from a list of 24 different industries found in the drop down list.
- **Company Entity Type:** Select the company’s entity type from the drop down list. Entries include Government, Private, and Public.
- **Company Usage Type:** (Required) Select the company’s usage type from the drop down list.

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

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**Note:** This section is no longer used.

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

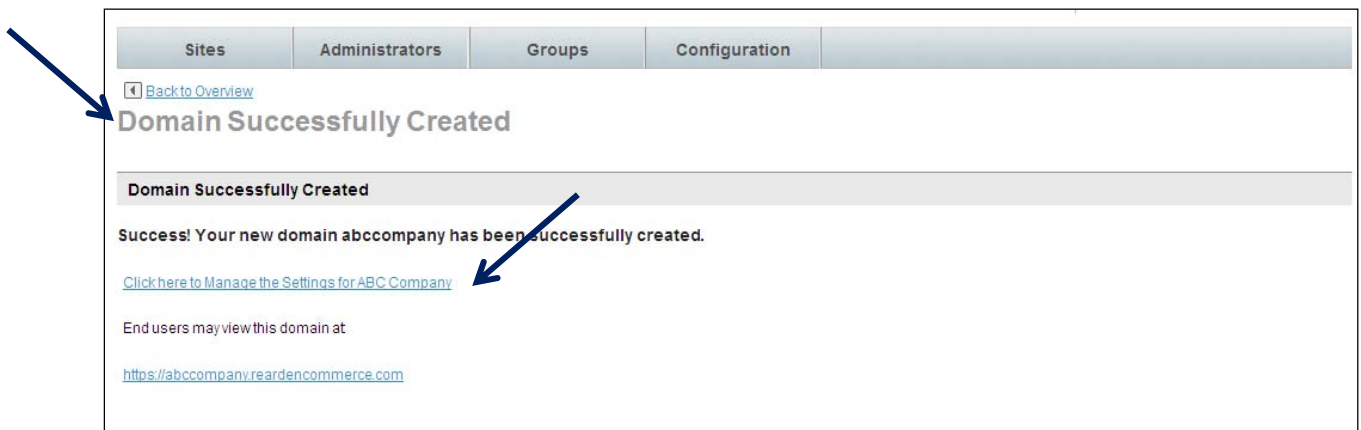


- Select any 2 languages, indicating they will be available for selection to the end users.

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:


The screenshot shows the Partner Dashboard interface for '4testcompanytemplate-testtmc'. The top navigation bar includes links for 'Partner Dashboard Home', 'Change Tools', 'Change Password', 'Help', and 'Sign out'. The main header displays 'Test TMC presents Partner Dashboard' and the '4 Test Company' logo. A navigation menu below the header contains tabs for 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. The 'Settings | Overview' section is active, listing various configuration options:



- General Settings**: Manage site's custom settings like Delegate settings, Support message etc.
- Home Page Options**: Customize the message and additional resource links visible on the Home page.
- Company Information**: Capture the Company's Address and Contact Information used to profile the site and provide tips to optimize online spend program.
- Logo Image Upload**: Upload the site's image. The logo is visible on the Application Header.
- 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.
- Privacy Policy Settings**: Specify the Privacy Policy for the Site.
- Email Settings**: Setup Activation, Reminder and Password Reset Email templates for the Site.
- Profile Field Settings**: Customize User profile settings. Specify which fields are mandatory, if the user can see and edit them etc.
- FTP Servers**: Setup FTP Accounts used for Bulk Profile updates. This activity needs IT assistance.
- Web Services**: Configure web service subscriptions for the site. This activity needs IT assistance.
- Open Enrollment**: Enable End Users to self-onboard the site. Recommended.
- 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.
- Mobile Settings**: Customize Mobile support info and upgrade reminder settings.
- Meeting Settings**: Configure settings for enabling meeting integration for meeting attendees.
- Password Security**: Specify the password criteria for the site for example min 8 characters, enable remember me feature etc.
- 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:

|  |   |
|--|---|
|  <b>Settings Tab</b>  |   |
| <p><b>General Settings</b></p>   | <p><b>Home Page Options</b></p>   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Add Launch date</li> <li><input type="checkbox"/> Allow Delegation?</li> <li><input type="checkbox"/> Allow Self Delegation?</li> <li><input type="checkbox"/> Help Desk Contact Name &amp; Method</li> <li><input type="checkbox"/> Allow Importing / Exporting Contacts?</li> <li><input type="checkbox"/> Spend Management Messaging</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Home Page Messaging (Company News)</li> <li><input type="checkbox"/> Resource Links (add new / remove duplicates)</li> </ul>  |
| <p><b>Company Information</b></p>  | <p><b>Logo Image Upload</b></p>   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Company Address</li> <li><input type="checkbox"/> Contact Information</li> <li><input type="checkbox"/> Additional Information</li> </ul>  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Company logo – 60h x 420w pixels max. GIF, PNG &amp; JPG format only</li> </ul>   |
|  | <p><b>Password Security (if not SSO)</b></p>  |
|  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Any company specific password security policy settings?</li> </ul>  |
| <p><b>Groupware Servers</b></p>  | <p><b>Profile Field Settings</b></p>  |
| <p>Consumer Calendars (Google/Yahoo etc.) can be enabled for all users or a group of users.<br/>Customer enabling groupware integration?</p> <p><b>If Yes:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Has attended Deem training calls?</li> <li><input type="checkbox"/> Has defined delegate username and password</li> <li><input type="checkbox"/> Has updated all email accounts to allow the delegate user</li> </ul> <p>Define company groupware servers and delegate user name and password</p> | <ul style="list-style-type: none"> <li><input type="checkbox"/> 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</li> <li><input type="checkbox"/> Customize Profile Fields to allow for unique reporting field requirements. I.e. Cost Center = 5 numeric</li> <li><input type="checkbox"/> Rename and define “Misc” fields for display / reporting</li> </ul> |
| <p><b>Email Settings</b></p>   | <p><b>Web Services</b></p>  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Update application URL for end user / administrator</li> <li><input type="checkbox"/> Update “From” email display (NOT email ADDRESS!)</li> </ul>  | <ul style="list-style-type: none"> <li><input type="checkbox"/> No action necessary on site level</li> <li><input type="checkbox"/> On SUPERDOMAIN level, assign new site to a Superdomain web services subscription (max 50 sites per subscription).</li> </ul>  |

|   |   |
|---|---|
| <input type="checkbox"/> Update Activation Email (if customized per client)   |   |
| <b>FTP Servers</b>  | <b>Single Sign On</b>   |
| <p>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?</p> <p><b>If Yes:</b></p> <input type="checkbox"/> Define SFTP server   | <input type="checkbox"/> Enable / Disable<br><b>If Enabled – Initially:</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Enter a Support Portal Case. Include names &amp; emails of all individuals who should be sent a confirmation notification</li> <li><input type="checkbox"/> For Ping Adapter Requests - Use template provided by Deem</li> <li><input type="checkbox"/> Provide name in URL. Use site name up to .deem.com (Example: acme-yourtravel)</li> <li><input type="checkbox"/> Use address pre-filled on ping adapter request (integration@deem.com)</li> <li><input type="checkbox"/> Copy your Activation Manager</li> </ul> |
| <b>Open Enrollment</b>  | <b>Mobile Settings</b>  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Enable / Disable</li> <li><input type="checkbox"/> Restrict access using Allowed Domains and / or Secret Key</li> <li><input type="checkbox"/> Add Successful enrollment email notification address</li> <li><input type="checkbox"/> Update Activation Email (if customized per client)</li> </ul> <p>Remember: Open Enrollment is NOT enabled when cloned from the template</p> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Update Helpdesk Email / Phone, as applicable.</li> <li><input type="checkbox"/> Click SAVE (even if no changes made) to enable mobile functionality</li> </ul>  |
|  <b>Services Tab</b>   |   |
| <b>Travel (Heading)</b>   | <b>Travel – Vendor Management</b>   |
| <input type="checkbox"/> Resource Links (add new / remove duplicates)   | <input type="checkbox"/> Client specific preferences for air / car / hotel  |
| <b>Travel - Agency Configuration</b>  |   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Agency Settings - Pseudo City Code, Default Queue and PCC Sales Location</li> <li><input type="checkbox"/> Agency Settings - TA Printer Address to Auto Void and/or Refund</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Agency Settings - PNR Synch enablement required only if different queues used from PNR Synch site or if PNR Synch site does not exist.</li> <li><input type="checkbox"/> Agency Settings – Enter airline Negotiated Rate Code</li> <li><input type="checkbox"/> Agency Settings – Verify Train Support identifiers and contact. The generic code can be used for</li> </ul>   |

|  |  |
|--|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Agency Settings – Ancillary Sources – verify Source configuration for adding passive segments to GDS and queues.</li> <li><input type="checkbox"/> Agency Settings - Ancillary Sources – add/delete sources as necessary.</li> <li><input type="checkbox"/> Agency Settings - Agency Information, incl. ARC/IATA and Time Zone</li> <li><input type="checkbox"/> Agency Settings – enter client Domestic Definition</li> <li><input type="checkbox"/> Agency Settings – PNR Synch - Owner ID (MUST match profile map! EX: SYNCHID vs. SYNCH ID)</li> </ul> | <p>sites without negotiated rates or site card. A new code must be requested for site card and / or negotiated rates by company.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Agency Settings – Review Pre-trip Approval settings</li> <li><input type="checkbox"/> Custom PNR – Update first level star name for site</li> <li><input type="checkbox"/> Custom PNR – Update/Add other specific scripts (queues, etc)</li> <li><input type="checkbox"/> Queue / Delivery Options – Conditions, PCC, etc.</li> </ul> <p><b>Note:</b> 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.</p> |
| <p><b>Travel – Travel Policy Management</b></p>  | <p><b>Travel - Compliance Code Management</b></p>  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Client specific flight, car and hotel policy</li> <li><input type="checkbox"/> Policy messaging, behavior and queuing</li> <li><input type="checkbox"/> Determine if multiple policies are required for separate groups of travelers (Default/VIP/Guest etc.)</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Update codes for policy compliance</li> </ul>  |
| <p><b>Travel – Private Rates</b></p>   | <p><b>Travel – Display Configuration</b></p>   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Add / update Airlines Rates (if more than 1 rate code in agency settings), Car Rental CD numbers, hotel rate code for client</li> <li><input type="checkbox"/> Add Train Discount Code and message</li> <li><input type="checkbox"/> Verify room rates removed (AAA/AARP etc.)</li> <li><input type="checkbox"/> Upload client hotel database</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Alternate airports, search radius for air/hotel, etc</li> <li><input type="checkbox"/> Override company name on disclaimer</li> <li><input type="checkbox"/> Hotel Shopping Display – Use Tabs?</li> <li><input type="checkbox"/> Page messaging</li> <li><input type="checkbox"/> Determine if multiple displays are required for separate groups of travelers (Default/VIP/Guest etc.)</li> </ul>  |
| <p><b>Travel – Reference Points</b></p>  | <p><b>Car Service / Airport Parking</b></p>  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Download / update template then upload using good CSV procedure</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Update configuration / policies as necessary</li> <li><input type="checkbox"/> If negotiated rates, submit forms to Deem Car Service</li> </ul>  |
| <p><b>Shipping</b></p>   |  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Enable / Configure</li> <li><input type="checkbox"/> Provide Account numbers</li> </ul>  |  |
| <p> <b>Groups Tab</b></p>   | <p> <b>Reports Tab</b></p>  |

|   |  |
|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Create new groups (VIP, etc.)</li> <li><input type="checkbox"/> Create “Is A Traveler” Group for Profile Synch</li> <li><input type="checkbox"/> Does a Guest Traveler (non-profiled traveler) group need to be added? See Guest Traveler training clip for complete instruction.</li> </ul> <p><b>Note:</b> Do not use special characters or spaces in group names</p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Review Report schedules</li> </ul>   |
| <p> <b>Profiles Tab</b></p>  | <p> <b>Rules Tab</b></p>  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Schedule HR file/profile loads if not Open Enrollment</li> <li><input type="checkbox"/> 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).</li> </ul>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Service Rules - Assign appropriate rules to user groups</li> <li><input type="checkbox"/> Groupware Rules – verify Calendar Type (iCal, inline or Groupware)</li> <li><input type="checkbox"/> Display Option Rules - Time Zone, etc</li> <li><input type="checkbox"/> Web Services Rules – enable Profile Synch (profile pull)</li> <li><input type="checkbox"/> Mobile Rules - Add / Activate for all users or a group.</li> </ul> |
| <p> <b>Other</b></p>   |  |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Restricted Countries on Site or Superdomain level?</li> <li><input type="checkbox"/> Identify new custom fields, if any</li> <li><input type="checkbox"/> Add Site Payment Card (Ghost Card/BTA), if applicable.</li> <li><input type="checkbox"/> Define Corporate Payment Cards. i.e. AX series 3878444</li> <li><input type="checkbox"/> Define Hotel Per Diems based on specific locations</li> <li><input type="checkbox"/> Clone/Create new profile map in the Profile Synch Interface (ETSI) and update lines as necessary.</li> <li><input type="checkbox"/> If new PCC, submit POS form for ITA</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Ensure client has whitelisted all Deem email domains:<br/>deem.com<br/>us.deem.com<br/>us1.deem.com</li> <li><input type="checkbox"/> Ensure client has unblocked the following URLs:<br/>deem.com<br/>rcobj.com<br/>google-analytics.com<br/>main.rcmsg.com</li> <li><input type="checkbox"/> Send Activation emails</li> </ul>   |

**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.

### **Site Administrator:**

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

### **Deem Team:**

*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:**

Use MS Excel with caution: 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.

Maintain a data repository: 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



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- Alternate Airports
- Policy Settings
- Compliance Codes
- Hotel Per Diems
- Custom Fields
- Restricted Countries
- ITA Rate Code Requests (and verification of completion)
- Travel Agency Configuration (queues, etc)
- Unused Ticket database upload

### Car Service:

- Reference points
- Policy Settings
- Vendor Preferences

### Airport Parking:

- Policy Settings

### Conferencing:

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

### Shipping:

- Vendors
- Contacts
- Policy Settings
- Billing information (including account numbers)
- Service Options
- Rate Information
- Documentation Requirements
- International Requirements
- Endicia Account Setup (for US Postal Service)
- 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 Administrators Tab

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

### 2.2.1 Create a Dashboard Administrator

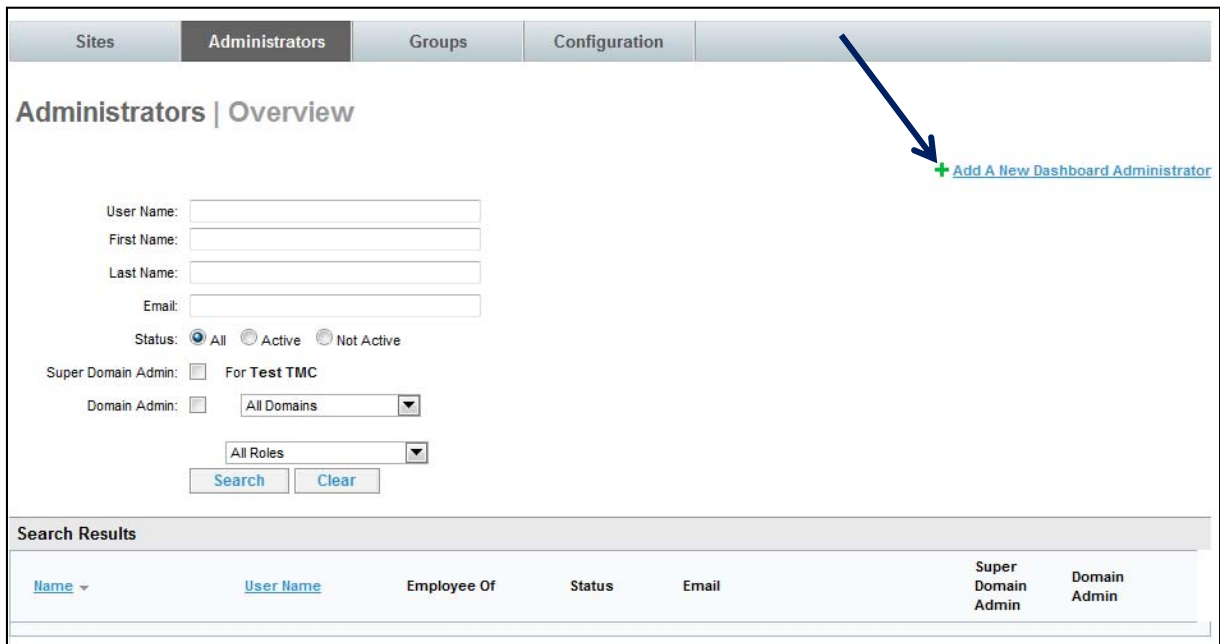
To create a Dashboard Administrator:

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. Click the **Add a New Dashboard Administrator** link.

**Note:** Only administrators with create an administrator permission may add new administrators.



4. The **Administrators | Add Administrator** page is displayed. Complete the **Account Information**:

- **User Name:** (Required) Enter the user name to be used by this administrator. The name must be unique to the dashboard.

Note: The Dashboard Administrator user name is **not** linked to or associated with the end user name in Deem.

- **First Name:** (Required) Enter the administrator’s first name.
- **Last Name:** (Required) Enter the administrator’s last name.
- **Email:** (Required) Enter the administrator’s email address.
- **Password:** (Required) Enter the password the administrator will use to access the Partner Dashboard.

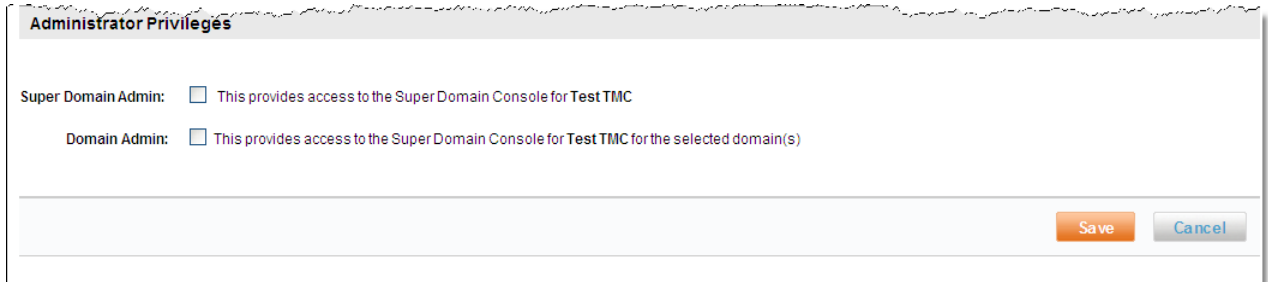
**Note:** The password may not contain the user name, user first name, or user last name. It may also not include a common word or name and must include at least one numeric character and one alpha character. For example, an acceptable password would be p8ssw0rd, but not passw0rd because “pass” is a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

- **Confirm Password:** (Required) Confirm the entry of the password by re-entering it.
- **Employee Of:** Select either *Partner* or *Client* from the drop down list.

**Note:** Select *Partner* when this administrator requires access on both the Partner Dashboard and Site levels. Select *Client* when this administrator requires access to only one Site.

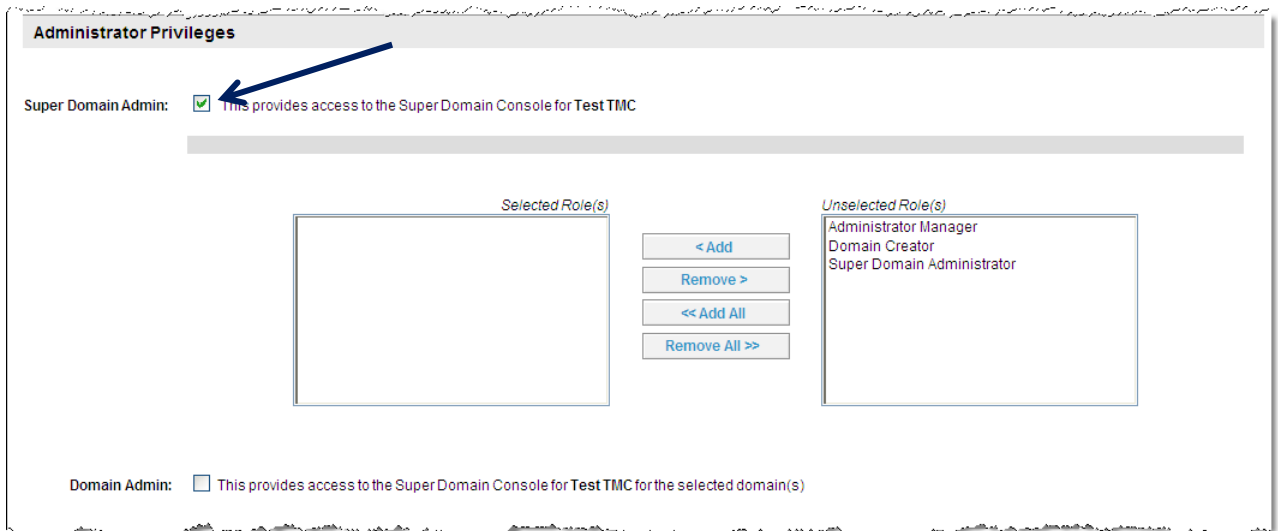
- **Department:** Select **Support Team**, **Customer Service**, or **Deployment** from the drop down list.
- **Super Domain:** The **Super Domain** name is displayed.

5. Complete the **Administrative Privileges** section of the page.



6. Select the **Super Domain Admin** checkbox, the **Domain Admin** checkbox or both if this administrator will have access on both the super domain and the site levels.

**Super Domain Admin** checkbox: By selecting this checkbox, the new administrator will be allowed access to the Partner Dashboard (Super Domain “Console”).



- Highlight the role to select it in the **Unselected Role(s)** box. Multiple roles may be selected by holding down the Control key while making selections.
- Click **Add** to move the selected role(s) to the left box – the **Selected Role(s)** box. Move / select all of the roles by clicking the **Add All** button.
- When the roles are selected / moved, they appear in the left – **Selected Role(s)** box and are no longer displayed in the right – **Unselected Role(s)** box.

7. Select the role(s) for the new administrator.

### 2.2.1.1 Roles Definitions – Super Domain Level:

#### Administrator Manager:

- Full Super Domain Dashboard access including:
  - Create and manage sites and site templates
  - Administrator Tab: Ability to create an administrator, search for existing administrators, edit administrator name and password, and delete administrators.
  - Domain Groups Tab: Add / edit domain groups

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- Configuration Tab: Access and maintain the Super Domain level site configuration: profile extract, pull, push offline unused ticket uploads, Service / Transaction Fees. Vendor preferences and manage rewards programs
  - View Insights Pages
- Full Partner Dashboard access including:
  - All options on Settings, Users, Services, Groups, Rules, Reports, and Profiles Tabs

### **Domain Creator:**

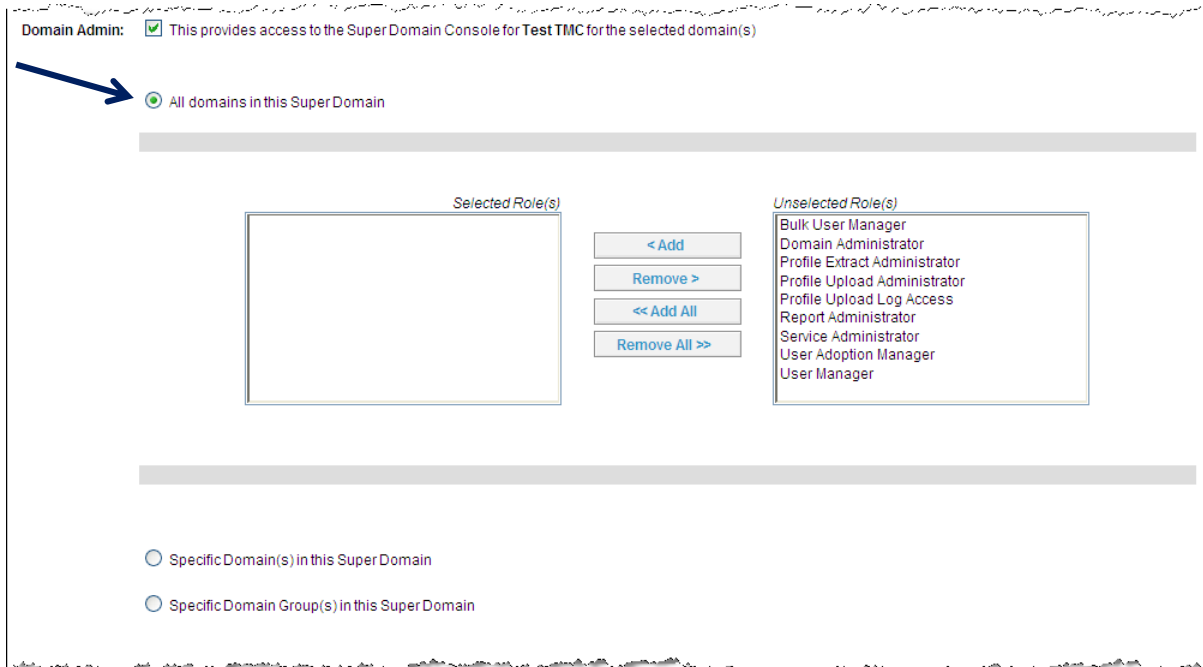
- Partial Super Domain Dashboard access including:
  - Create sites and manage site templates
  - View Insights Pages
  - Cannot access Administrators, Domain Groups or Configuration Tabs
- Partial Partner Dashboard access including:
  - All options on Settings, Users, Services, Groups, Rules, and Reports Tabs
  - Cannot access Profiles Tab

### **Super Domain Administrator:**

- Partial Super Domain Dashboard access including:
  - Create and manage sites and site templates
  - Domain Groups Tab: Add / edit domain groups
  - Configuration Tab: Access and maintain the Super Domain level site configuration: profile extract, pull, push offline unused ticket uploads, Service / Transaction Fees. Vendor preferences and manage rewards programs
  - View Insights Pages
  - Cannot access Administrators Tab: Cannot create an administrator, search for existing administrators, edit administrator name and password, or delete administrators.
- Partial Partner Dashboard access including:
  - All options on Settings, Users, Services, Groups, Rules, and Reports Tabs
  - Cannot access Profiles Tab

**Domain Admin** checkbox: By selecting this checkbox, the new administrator will be allowed access to either all sites within the Partner Dashboard superdomain site or to specific sites or groups of sites within the superdomain.

Here we have selected the **All domains in this Super Domain** radio button.



- Highlight the role to select it in the **Unselected Role(s)** box. Multiple roles may be selected by holding down the Control key while making selections.
- Click **Add** to move the selected role(s) to the left box – the **Selected Role(s)** box. Move / select all of the roles by clicking the **Add All** button.
- When the roles are selected / moved, they appear in the left – **Selected Role(s)** box and are no longer displayed in the right – **Unselected Role(s)** box.

### 2.2.1.2 Roles Definitions – Site Level:

**Bulk User Manager:** Access to the Users Tab (only):

- Full access to the Users Tab options

**Domain Administrator:**

- Full access to the Settings, Users, Services, Groups, Rules, and Reports Tabs
- Cannot access Profiles Tabs

**Profile Extract Administrator** - Access to the Profiles Tab (only):

- **Partial access to Profiles Tab**
  - Create Extract File (Both User and Delegate)
  - View Extract Activity Logs
  - Cannot access:
    - Schedule Profile Uploads
    - View Upload Activity Logs
    - View Scheduled Uploads
    - Schedule Unused Ticket Uploads

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- View Unused Ticket Upload Activity Logs
- View Unused Ticket Scheduled Uploads
- Download User Profile, Delegate & Unused Ticket Templates

### **Profile Upload Administrator** - Access to the Profiles Tab (only):

- Partial access to Profiles Tab
  - Schedule Profile Uploads
  - View Upload Activity Logs
  - View Scheduled Uploads
  - Schedule Unused Ticket Uploads
  - View Unused Ticket Upload Activity Logs
  - View Unused Ticket Scheduled Uploads
  - Download User Profile, Delegate & Unused Ticket Templates
  - Cannot access:
    - Create Extract File (Both User and Delegate)
    - View Extract Activity Logs

### **Profile Upload Log Access** - Access to the Profile Tab (only):

- Partial access to Profiles Tab
  - View Upload Activity Logs (Both User and Delegate)
  - Cannot access:
    - Schedule Profile Uploads
    - View Scheduled Uploads
    - Schedule Unused Ticket Uploads
    - View Unused Ticket Upload Activity Logs
    - View Unused Ticket Scheduled Uploads
    - Download User Profile, Delegate & Unused Ticket Templates
    - Create Extract File (Both User and Delegate)
    - View Extract Activity Logs

### **Reporting Manager:** Grants full access to the Reports Tab only

### **Service Administrator:**

- Partial access to the Settings Tab:
  - Email Settings
  - Mobile Settings
  - Home Page Options
  - Logo Image Upload
  - Cannot access on Settings Tab:
    - General Settings
    - Company Information

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- Groupware Servers
  - FTP Servers
  - Open Enrollment
  - Password Security
  - Privacy Policy Settings
  - Profile Field Settings
  - Web Services
  - Single Sign On
  - Meetings View
- Full access to the Users, Services, Groups and Reports Tabs
  - Partial access to the Rules Tab
    - Service Rules
    - Account Rules
    - Dynamic Profile Attribute Assignment Rules
    - Cannot access:
      - Groupware Rules
      - Display Options Rules
      - Web Services Rules
      - Mobile Rules

### **User Adoption Manager** - Access to the Users Tab (only):

- Partial Access to the User Tab:
  - Edit a User
  - Add a User
  - Single User Activation
  - Single User Deactivation
  - Single User Registration Reminder
  - Impersonate a User
  - User Statistics with a link to statistics details
  - Cannot access:
    - Bulk User Activations & Reminders

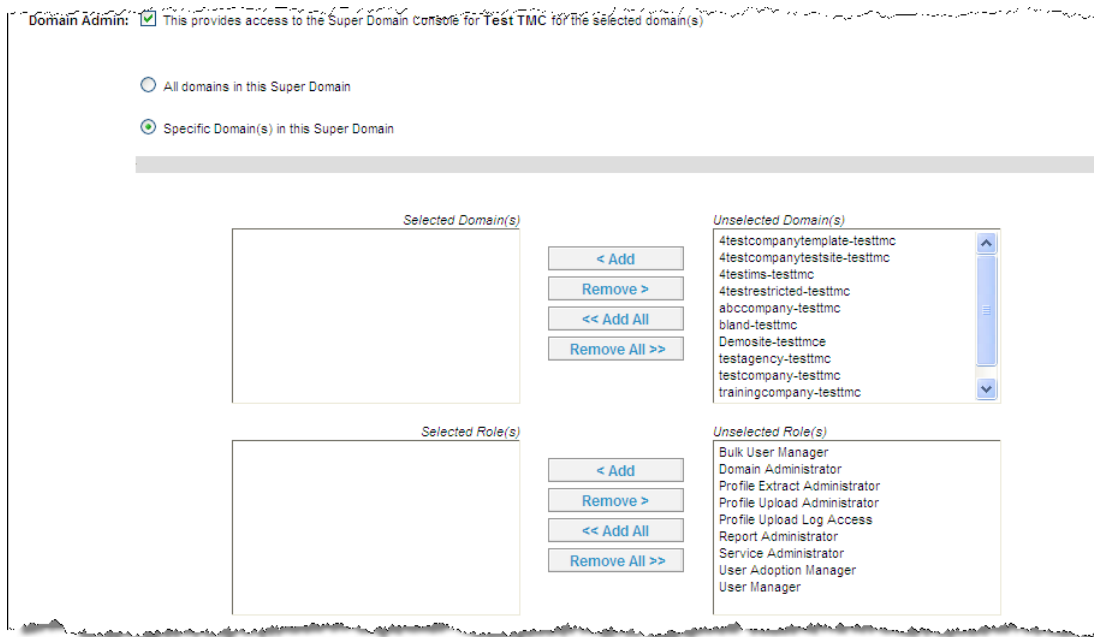
### **User Manager** - Access to the Users Tab (only):

- Partial Access to the User Tab:
  - Edit a User
  - Add a User
  - Single User Activation
  - Single User Deactivation
  - Single User Registration Reminder



- Impersonate a User
- User Statistics without the link to statistics details
- Cannot access:
  - Bulk User Activations & Reminders

Here we have selected the **Domain Admin: Specify domain(s) in this Super Domain**. Select the specific domains (sites) as well as the roles to assign to the administrator. See [Roles Definitions](#) for a complete explanation of Roles in the Deem Travel Partner Dashboard.



- Highlight the site / domain to select it in the **Unselected Domain(s)** box. Multiple sites / domains may be selected by holding down the Control key while making selections.
- Click **Add** to move the selected sites / domain(s) to the left box – the **Selected Domain(s)** box. Move / select all of the sites / domains by clicking the **Add All** button.
- Highlight the role to select it in the **Unselected Role(s)** box. Multiple roles may be selected by holding down the Control key while making selections.
- Click **Add** to move the selected role(s) to the left box – the **Selected Role(s)** box. Move / select all of the roles by clicking the **Add All** button.

---

**Note:** When the sites / domains and the roles are selected / moved, they appear in the left – **Selected Domain(s)** or **Selected Role(s)** boxes and are no longer displayed in the right – **Unselected Domain(s)** or **Unselected Role(s)** boxes.

**Note:** To remove a dashboard administrator's access to a site remove entries from the left – **Selected Domain(s)** or **Selected Role(s)** box by selecting them and clicking **Remove** to remove selected entries or click **Remove All** to remove all the entries. Once the site(s) or role(s) have been removed, they are displayed in the right – **Unselected Domain(s)** or **Unselected Role(s)** box.

---

- Here we have selected the **Domain Admin: Specify Domain Group(s) in this Super Domain**. Select the specific domain groups as well as the roles to assign to the administrator. See [Roles Definitions](#) for a complete explanation of Roles in the Deem Travel Partner Dashboard.

The screenshot shows a configuration interface with three radio buttons at the top: "All domains in this Super Domain", "Specific Domain(s) in this Super Domain", and "Specific Domain Group(s) in this Super Domain". The third option is selected. Below are two sections: "Selected Domain Group(s)" and "Selected Role(s)", each with a list box and a set of buttons: "< Add", "Remove >", "<< Add All", and "Remove All >>". The "Unselected Domain Group(s)" list contains "All Domains", "EPCO", and "Rearden Group" (highlighted). The "Unselected Role(s)" list contains "Bulk User Manager", "Domain Administrator", "Profile Extract Administrator", "Profile Upload Administrator" (highlighted), "Profile Upload Log Access", "Report Administrator", "Service Administrator", "User Adoption Manager", and "User Manager" (highlighted).

- Highlight the domain group to select it in the **Unselected Domain Group(s)** box. Multiple domain groups may be selected by holding down the Control key while making selections.
- Click **Add** to move the selected domain group(s) to the left box – the **Selected Domain Group(s)** box. Move / select all of the domain groups by clicking the **Add All** button.
- Highlight the role to select it in the **Unselected Role(s)** box. Multiple roles may be selected by holding down the Control key while making selections.
- Click **Add** to move the selected role(s) to the left box – the **Selected Role(s)** box. Move / select all of the roles by clicking the **Add All** button.

**Note:** When the domain groups and the roles are selected / moved, they appear in the left – **Selected Domain Group(s)** or **Selected Role(s)** boxes and are no longer displayed in the right – **Unselected Domain Group(s)** or **Unselected Role(s)** boxes.

The screenshot displays a configuration window with three radio buttons at the top: "All domains in this Super Domain", "Specific Domain(s) in this Super Domain", and "Specific Domain Group(s) in this Super Domain". The third option is selected. Below are four panels: "Selected Domain Group(s)" containing "Rearden Group"; "Unselected Domain Group(s)" containing "All Domains" and "EPCO"; "Selected Role(s)" containing "Bulk User Manager", "Profile Upload Administrator", and "User Manager"; and "Unselected Role(s)" containing "Domain Administrator", "Profile Extract Administrator", "Profile Upload Log Access", "Report Administrator", "Service Administrator", and "User Adoption Manager". Between the panels are sets of buttons: "< Add", "Remove >", "<< Add All", and "Remove All >>".

**Note:** To remove roles or access to a site / domain select the entries in the left – **Selected Domain Group(s)** or **Selected Role(s)** box and click **Remove** to remove selected entries or click **Remove All** to remove all the entries. Once the site(s) or role(s) have been removed, they are display in the right – **Unselected Domain Group(s)** or **Unselected Role(s)** box.

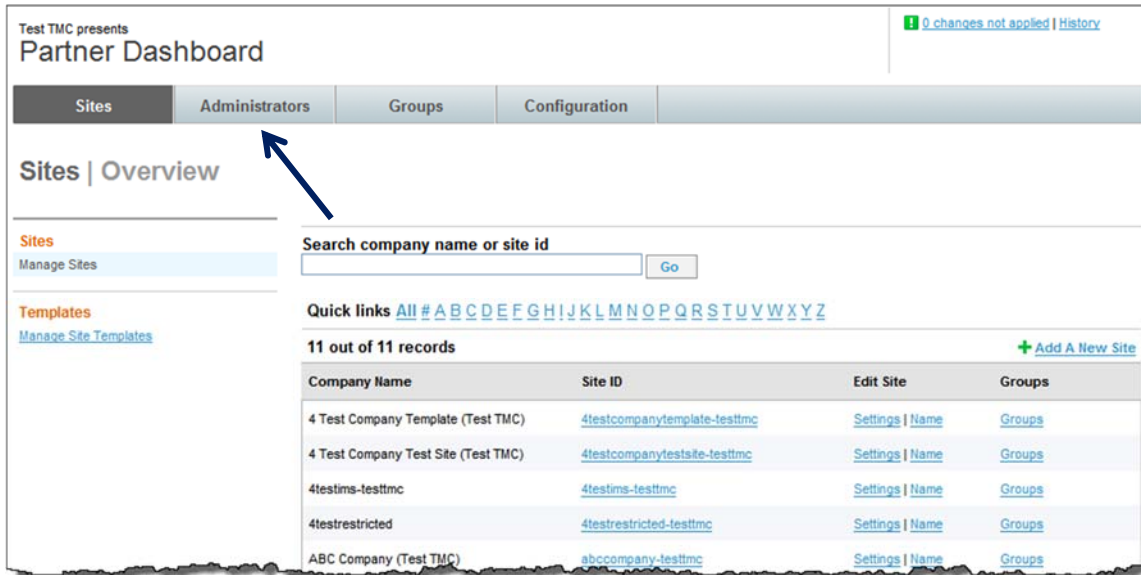
Click **Save** to save the Administrator.

The screenshot shows a dialog box with two buttons at the bottom right: "Save" (highlighted in orange) and "Cancel" (greyed out). A blue arrow points to the "Save" button.

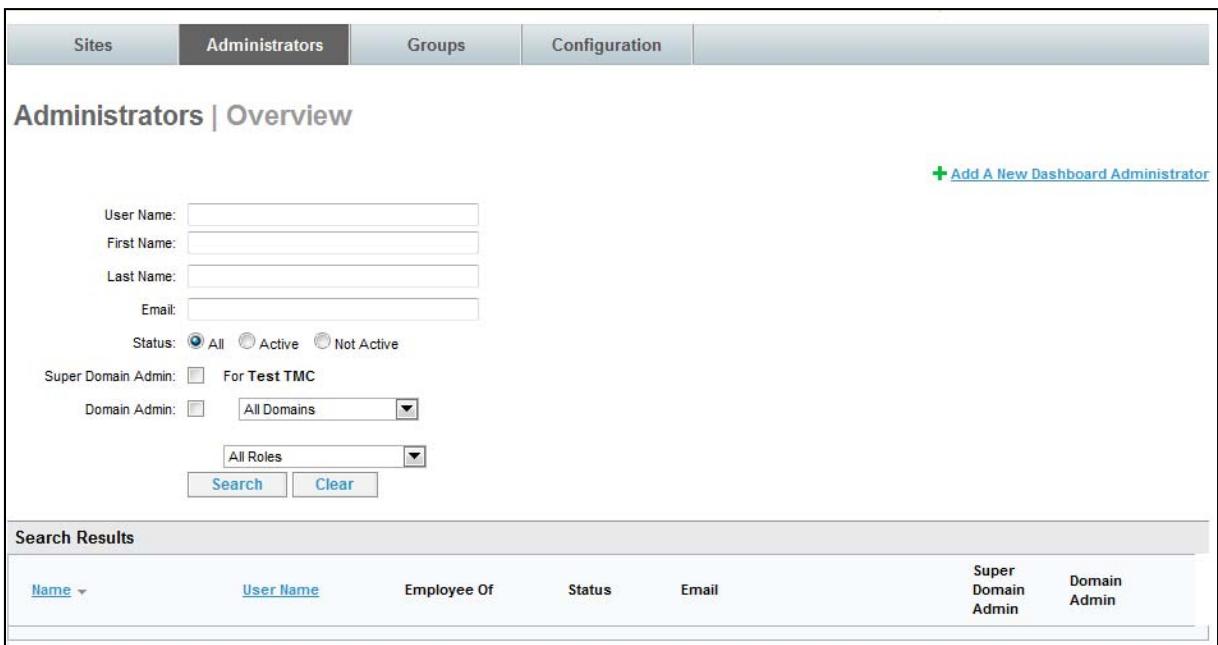
### 2.2.2 Manage Existing Administrators

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

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- **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.

The screenshot displays the 'Administrators | Overview' section of a web application. At the top, there are navigation tabs for 'Sites', 'Administrators', 'Groups', and 'Configuration'. Below the tabs, there is a search form with the following fields and options:

- User Name:
- First Name:
- Last Name:
- Email:
- Status:  All  Active  Not Active
- Super Domain Admin:  For Test TMC
- Domain Admin:  All Domains (dropdown)
- All Roles (dropdown)
- Search and Clear buttons

Below the search form, there is a 'Search Results' section containing a table with the following data:

| Name                            | User Name  | Employee Of | Status | Email                    | Super Domain Admin | Domain Admin   |
|---------------------------------|------------|-------------|--------|--------------------------|--------------------|--|
| <a href="#">Christine Bland</a> | chrisbland | Test TMC    | Active | cbland@reardencommer.com | x                  | <a href="#">Delete</a> <a href="#">Change Password</a> |

A blue arrow points to the 'Name' column header in the table.

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.

**Administrators | Edit Administrator**

**Account Information**

Is Active:

User Name:

First Name:

Last Name:

Email:

Employee Of:

Department:

Super Domain: Test TMC

**Administrator Privileges**

Super Domain Admin:  This provides access to the Super Domain Console for Test TMC

Domain Admin:  This provides access to the Super Domain Console for Test TMC for the selected domain(s)

**Selected Role(s)**

- Administrator Manager
- Domain Creator
- Super Domain Administrator

**Unselected Role(s)**

< Add  
Remove >  
<< Add All  
Remove All >>

Save Cancel

### 2.2.2.1 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.

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

The screenshot shows the 'Administrators | Overview' page with a navigation bar containing 'Sites', 'Administrators', 'Groups', and 'Configuration'. Below the navigation bar, there is a search form with the following fields and options:

- User Name:
- First Name:
- Last Name:
- Email:
- Status:  All  Active  Not Active
- Super Domain Admin:  For Test TMC
- Domain Admin:
- All Roles:
- Buttons: Search, Clear

Below the search form is a 'Search Results' section with a table header:

| Name | User Name | Employee Of | Status | Email | Super Domain Admin | Domain Admin |
|------|-----------|-------------|--------|-------|--------------------|--------------|
|------|-----------|-------------|--------|-------|--------------------|--------------|

- **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.

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

**Note:** Change the sort order of the search results by clicking either the **Name** or **User Name** links at the top of the search results.

**Administrators | Overview**

[+ Add A New Dashboard Administrator](#)

User Name:

First Name:

Last Name:

Email:

Status:  All  Active  Not Active

Super Domain Admin:  For Test TMC

Domain Admin:  All Domains

All Roles:

**Search Results**

| <a href="#">Name</a> ▾          | <a href="#">User Name</a> | Employee Of | Status | Email      | Super Domain Admin | Domain Admin   |
|---------------------------------|---------------------------|-------------|--------|------------|--------------------|--|
| <a href="#">Christine Bland</a> | chrisbland                | Test TMC    | Active | [REDACTED] | x                  | <a href="#">Delete</a> <a href="#">Change Password</a> |

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

**Administrators | Change Password**

[Back to Overview](#)

**Account Password**

Password:

Confirm Password:

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 been changed.

### 2.2.2.2 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:



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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.

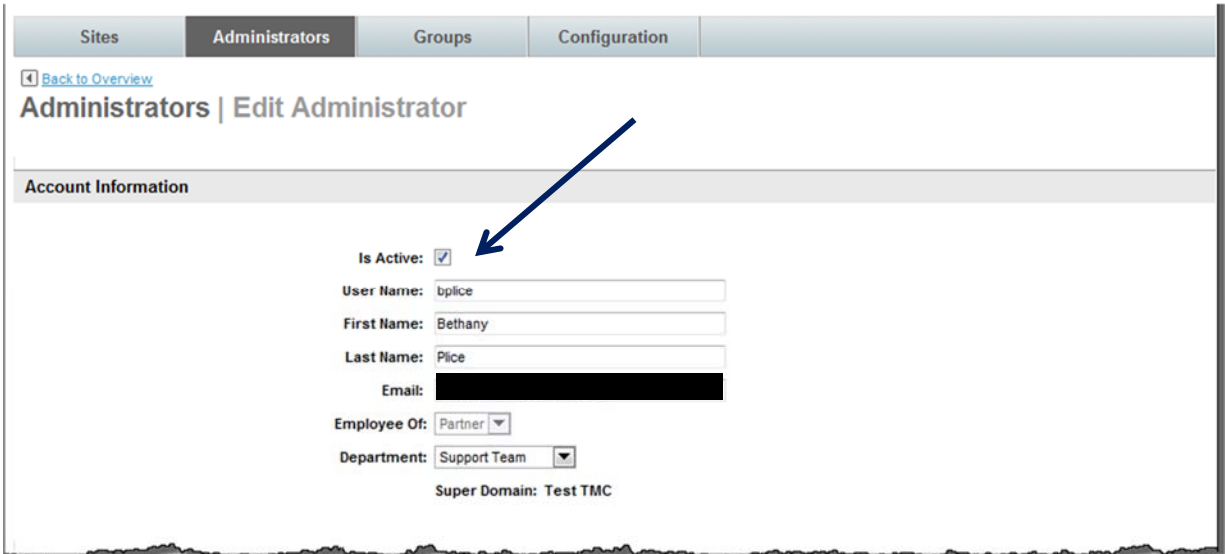
---

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

The screenshot displays the 'Administrators | Overview' page. At the top, there are navigation tabs: Sites, Administrators (selected), Groups, and Configuration. Below the tabs, the page title 'Administrators | Overview' is shown. On the right, there is a link '+ Add A New Dashboard Administrator'. The search filters section includes: User Name (empty), First Name (Beth), Last Name (empty), Email (empty), Status (radio buttons for All, Active, Not Active), Super Domain Admin (checkbox For Test TMC), Domain Admin (checkbox and dropdown menu), and All Roles (dropdown menu). Search and Clear buttons are present. Below the filters is a 'Search Results' section with a table. A blue arrow points to the 'Name' link in the table header. The table has columns: Name, User Name, Employee Of, Status, Email, Super Domain Admin, and Domain Admin. The first row shows 'Bethany Plice' with user name 'bplice', employee of 'All', status 'Active', and a redacted email. There are 'Delete' and 'Change Password' links for this administrator.

| Name                          | User Name | Employee Of | Status | Email      | Super Domain Admin | Domain Admin   |
|-------------------------------|-----------|-------------|--------|------------|--------------------|--|
| <a href="#">Bethany Plice</a> | bplice    | All         | Active | [REDACTED] | x                  | <a href="#">Delete</a> <a href="#">Change Password</a> |

- 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.



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



### 2.2.2.3 Delete Partner Dashboard Access of an Administrator

To delete Partner Dashboard access of an Administrator:

- Access the Deem Travel Partner Dashboard using a dashboard **User Name** and **Password**.
- The **Sites | Overview** page is displayed. Select the **Administrators** tab.
- 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

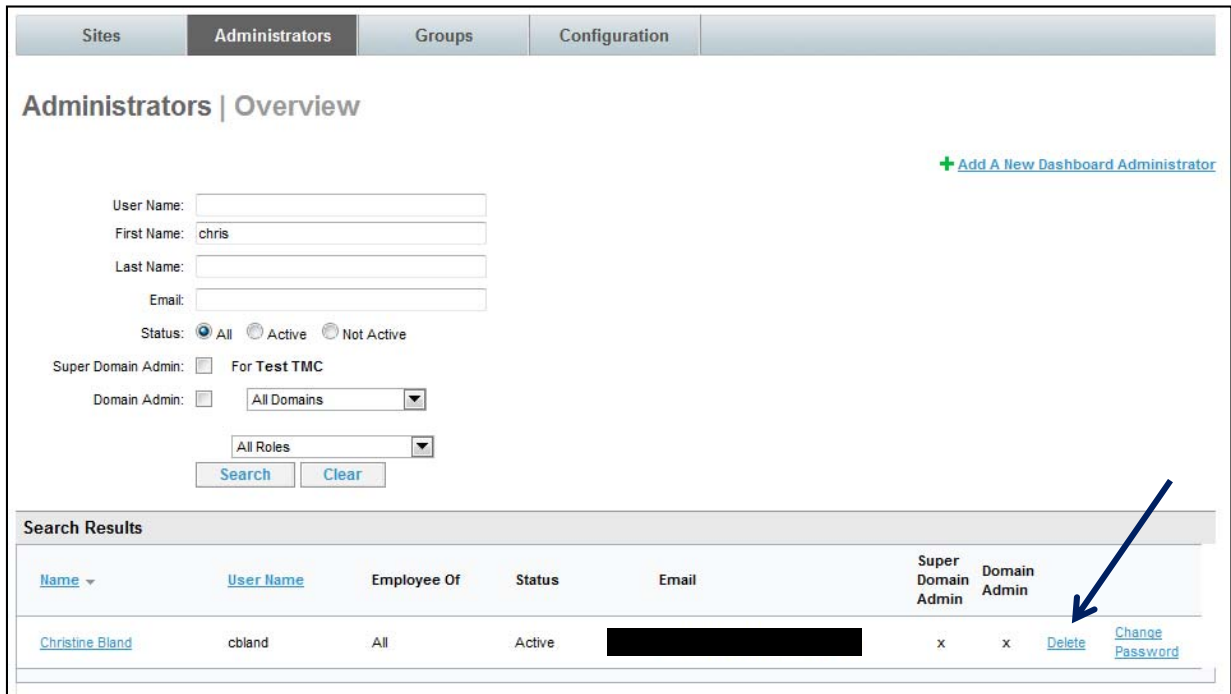
---

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

---

- 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.

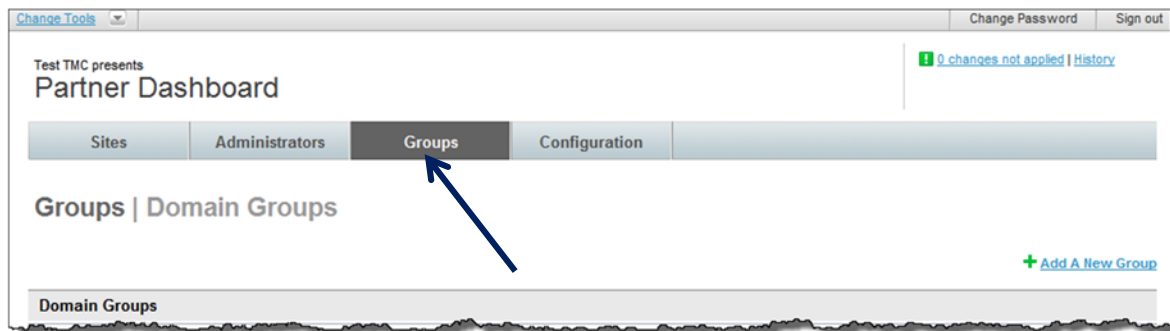
## 2.3 The Groups Tab

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.

### 2.3.1 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.



- The **Groups | Domain Groups** page is displayed. Click the **Add A New Group** link.

Test TMC presents  
Partner Dashboard

0 changes not applied | History

Sites Administrators **Groups** Configuration

Groups | Domain Groups

+ Add A New Group

| Group Name   | Number of Domains |   |
|--|-------------------|---|
| All Domains  | 11                | ✘ |
| <a href="#">All Domains for Restricted Countries</a> | 9                 | ✘ |
| <a href="#">Profile Synch</a>                        | 2                 | ✘ |
| <a href="#">Profile Synch #1</a>                     | 6                 | ✘ |
| <a href="#">RestrictedCountriesTest</a>              | 1                 | ✘ |

Showing 1 - 5 of 5

- The **Groups | Add / Edit Domain Groups** page is displayed. Enter a **Domain Group Name** for the group
- 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.

Sites Administrators **Groups** Configuration

[Back to Overview](#)

Groups | Add / Edit Domain Groups

Domain Group Name:

Domains In Group

Domains Not In Group

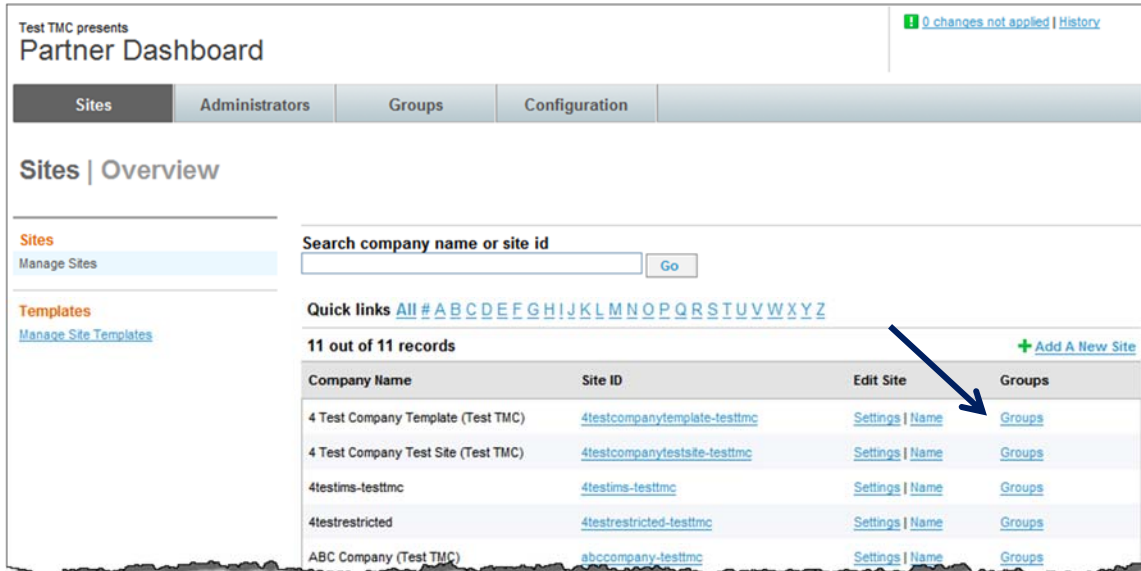
< Add  
Remove >  
<< Add All  
Remove All >>

Description: (optional)  
Enter up to 256 characters.  
\*

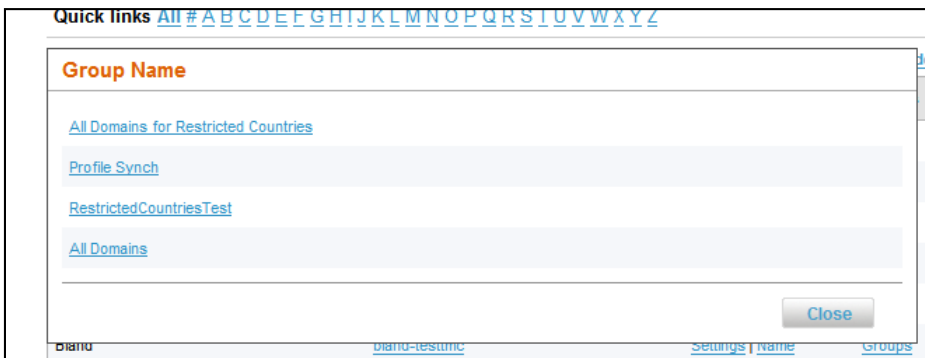
- Once all the sites / domains have been added to the group, click the **Save** button to save changes. Commit changes.

### 2.3.2 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.



### 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 the module series 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

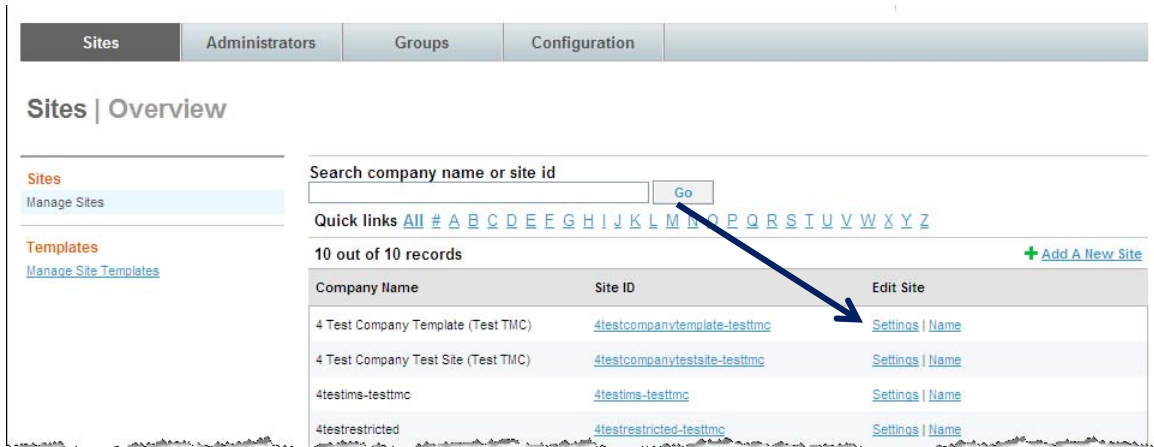
With the Users tab privileges a site administrator maintains Deem end-users' profiles.

| Method                      | How are accounts created?  | How is the data populated?   | Password?   |
|-----------------------------|--|--|---|
| <b>Open Enrollment</b>      | Users create their own account from the login page. Access is restricted by email domain name or a specific security code (Secret Key).  | All data is entered by user  | Created by user during enrollment process   |
| <b>Manual creation</b>      | 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. |
| <b>HR Feed</b>              | 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   |
| <b>Agency Upload</b>        | 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   |
| <b>Provisioning via SSO</b> | 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   |

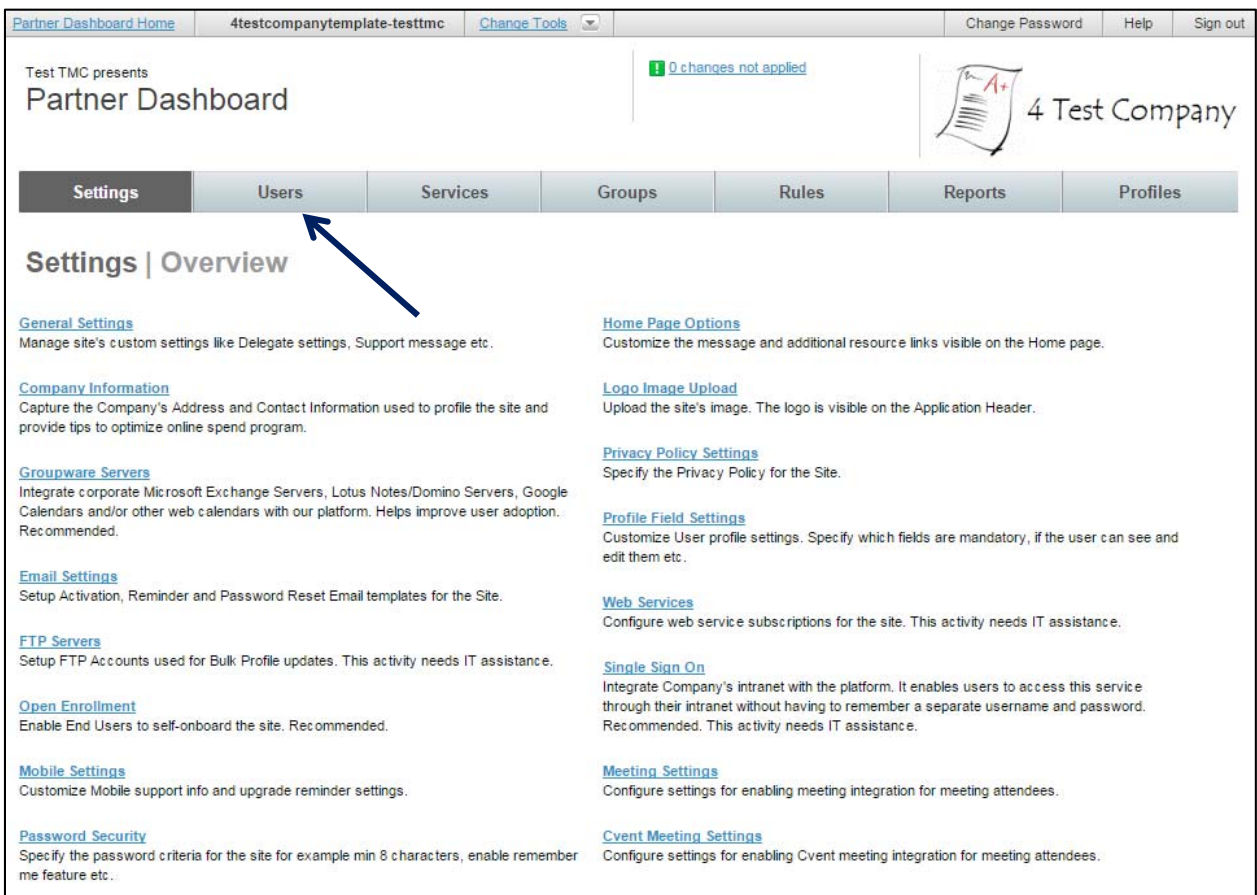
### 3.1.2 Add a User

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

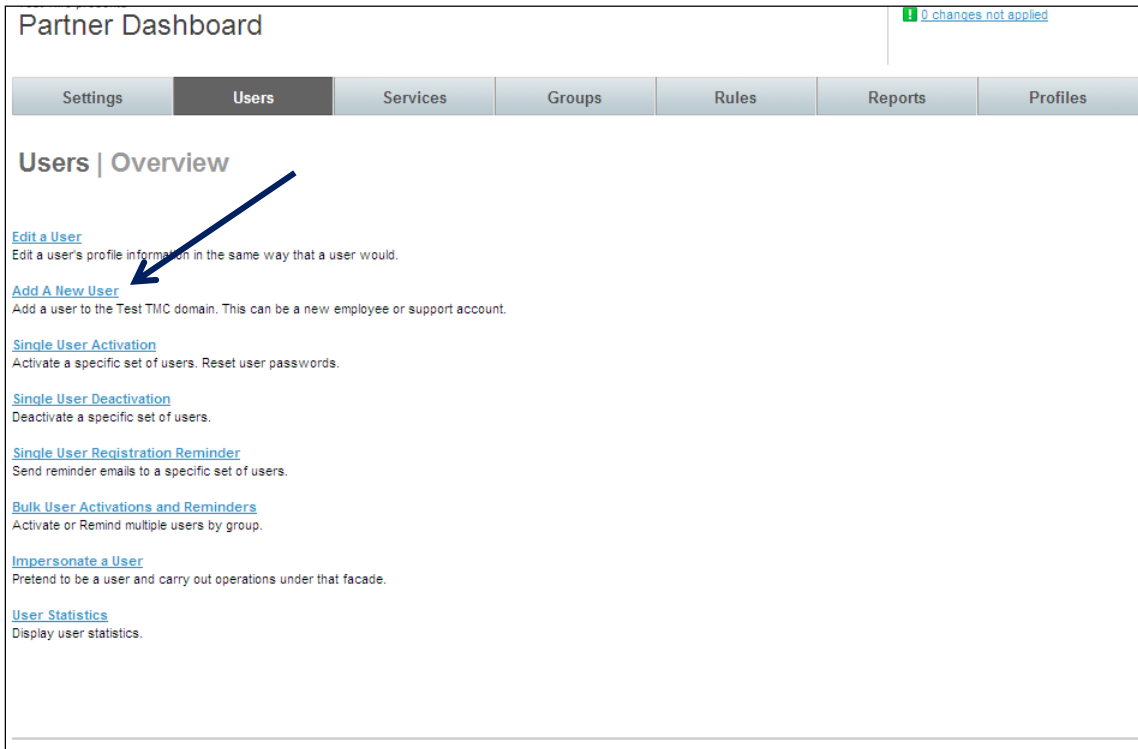
1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users tab permissions.
2. The **Sites | Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.



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.



**DEEM TRAVEL – PARTNER DASHBOARD TRAINING: MODULE 1**

- **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.

The screenshot shows a user creation form with the following elements:

- Site Administrator:**
- Activate Account:**  (indicated by a blue arrow)
- Password Options:**
  - Have system generate random password
  - Pre-define password for user
  - Below the radio buttons are two input fields: "Password:" and "Re-enter Password:"
- Force user to change password on first login
- Activation Email:**  Generate Activation Email [Preview Activation Email](#)

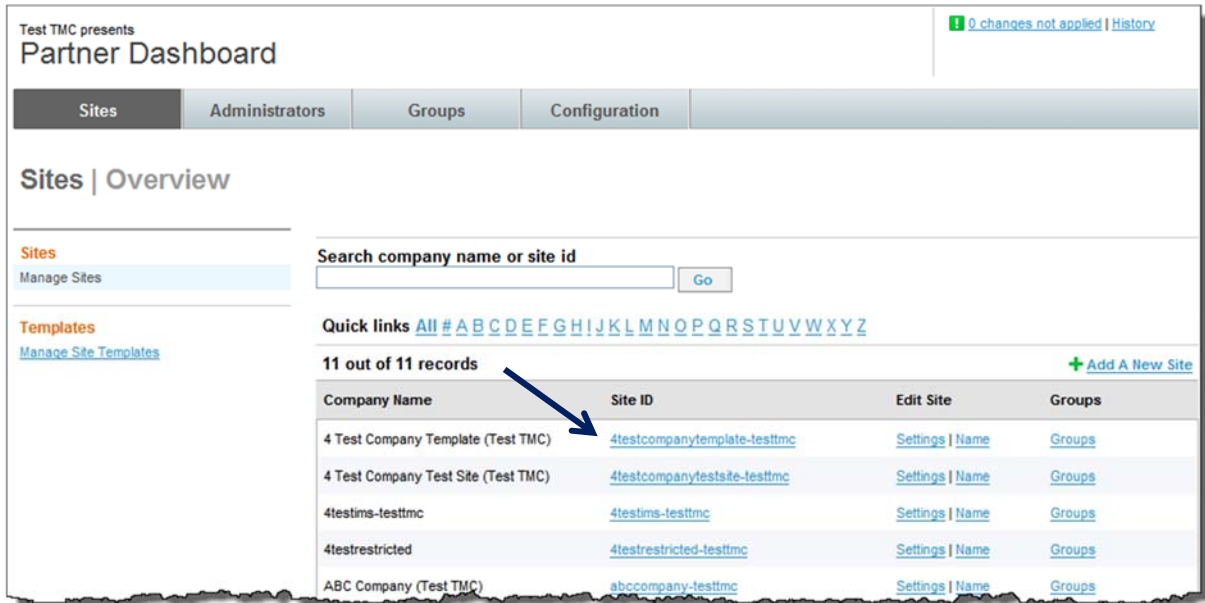
At the bottom of the form, there are four buttons: "Save User" (highlighted in orange), "Save & Add Another" (orange), "Save & Edit User" (orange), and "Cancel" (light blue).

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**.

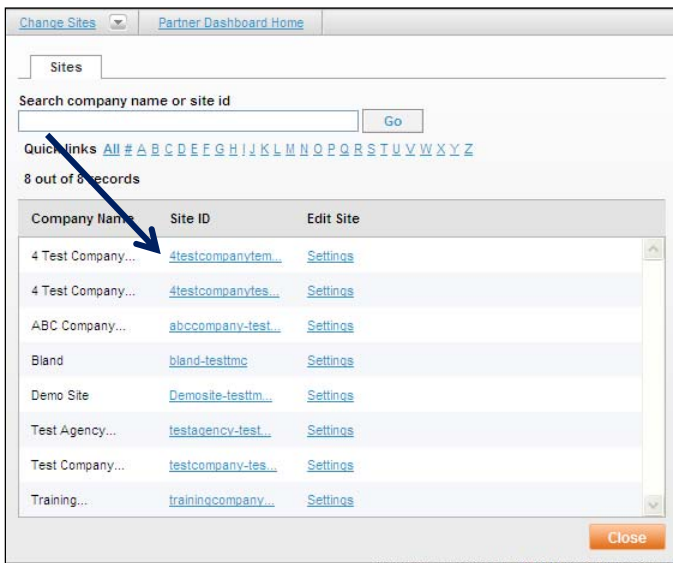
---

**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:

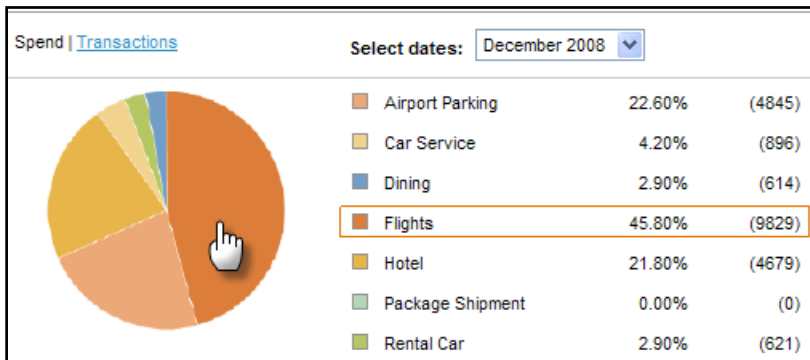


b. Or by clicking the **Site ID** link from the **Change Site** list.

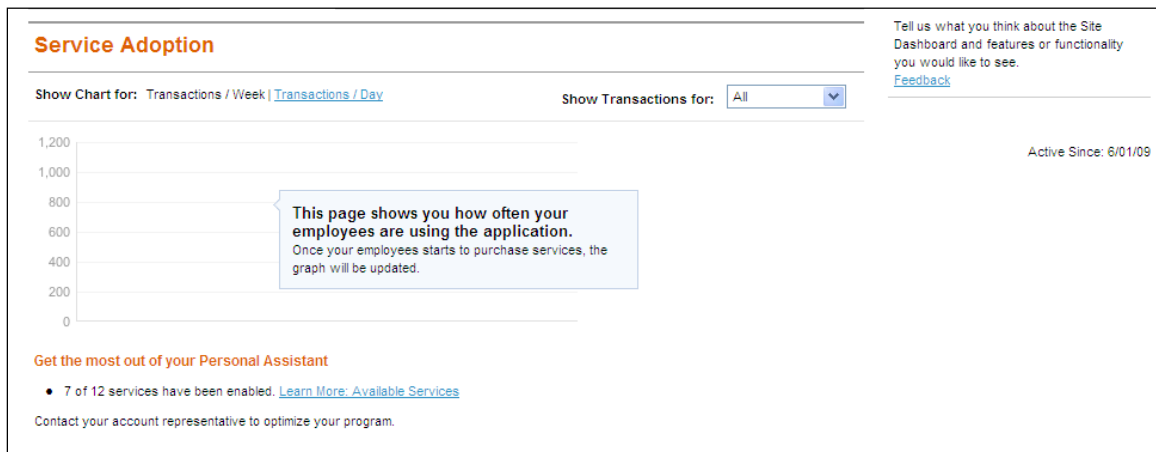


c. The **Insights page** is divided into four tabs; the Spending, Service Analysis, Service Activity and User Activity.

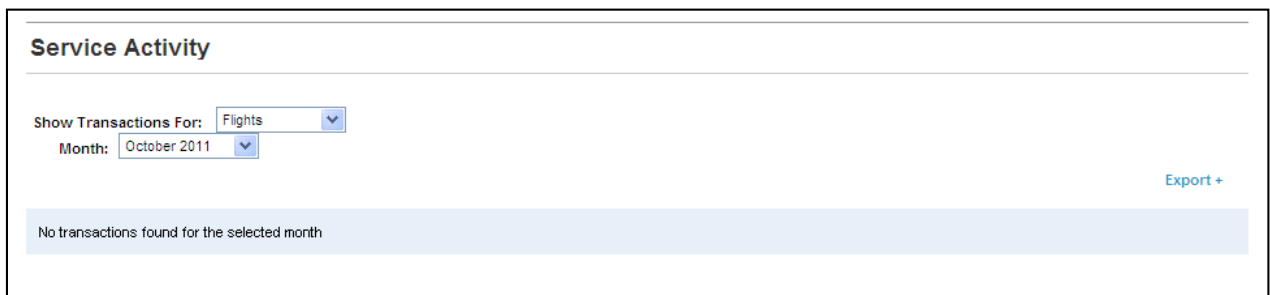
**Spending:** This page shows the statistics about a company’s spending.



**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 Adoption

Display: Unique Logins / Day | [Visits / Week](#)

---

#### User Login Trends

Loading... Active Since: 6/01/09  
You are being benchmarked as a small company. [What is peer benchmarking?](#)

---

#### User Adoption Funnel

Onboarded Users 6

Activated Users 6

Users who have logged in at least once 2

Users logged in within last 90 days 0

Total Employees: [50](#)

Tell us what you think about the Site Dashboard and features or functionality you would like to see. [Feedback](#)

**User Activity:** This page shows adoption statistics showing **Visits Per Week**.

### User Adoption

Display: [Unique Logins / Day](#) | [Visits / Week](#)

---

#### User Login Trends

Active Since: 6/01/09

| Time Period  | Visits / week |
|--------------|---------------|
| Last Year    | 3             |
| Year To Date | 4             |
| Last Month   | 1             |
| Last Week    | 6             |
| This Week    | 0             |

You are being benchmarked as a small company. [What is peer benchmarking?](#)

---

#### User Adoption Funnel

Onboarded Users 6

Activated Users 6

Users who have logged in at least once 2

Users logged in within last 90 days 0

Total Employees: [50](#)

Tell us what you think about the Site Dashboard and features or functionality you would like to see. [Feedback](#)

- 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](#)

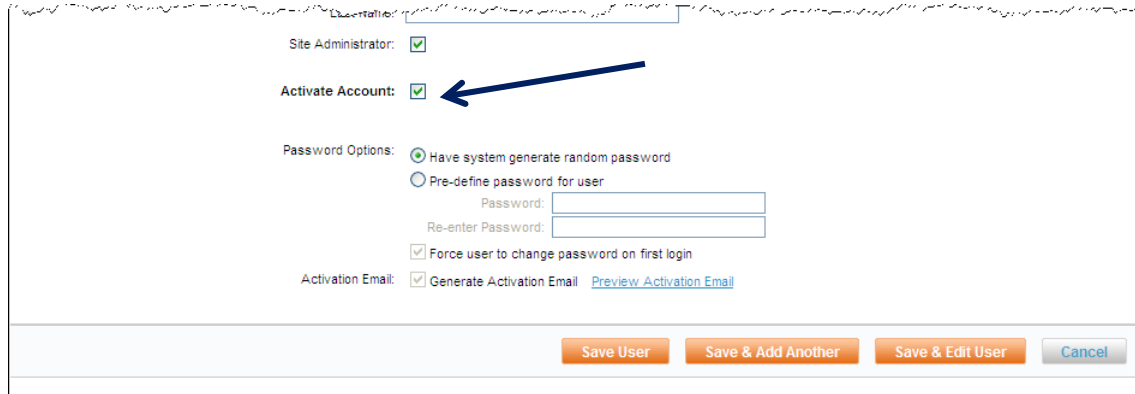
7. Click the **Activate Account** checkbox.

---

**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:



The screenshot shows a user creation form with the following fields and options:

- Site Administrator:
- Activate Account:  (indicated by a blue arrow)
- Password Options:
  - Have system generate random password
  - Pre-define password for user
- Fields for Pre-define password:
  - Password:
  - Re-enter Password:
- Force user to change password on first login:
- Activation Email:  [Preview Activation Email](#)

Buttons at the bottom: Save User, Save & Add Another, Save & Edit User, Cancel

- **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.

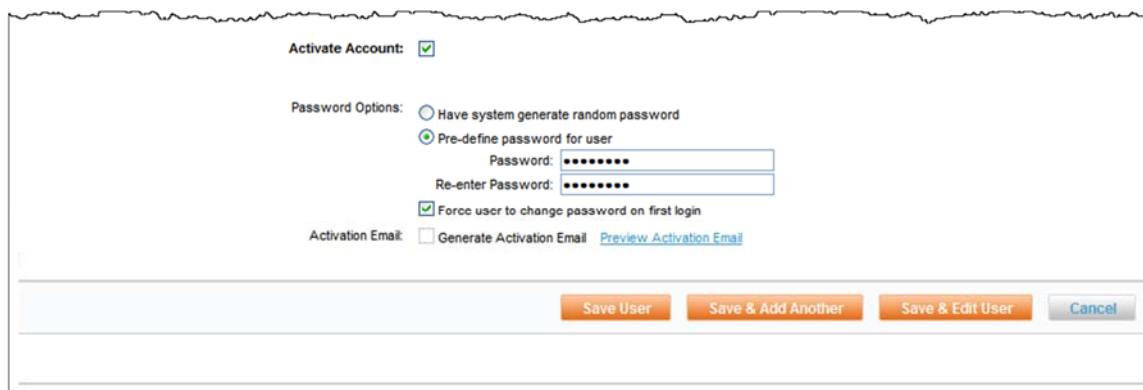
---

**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.



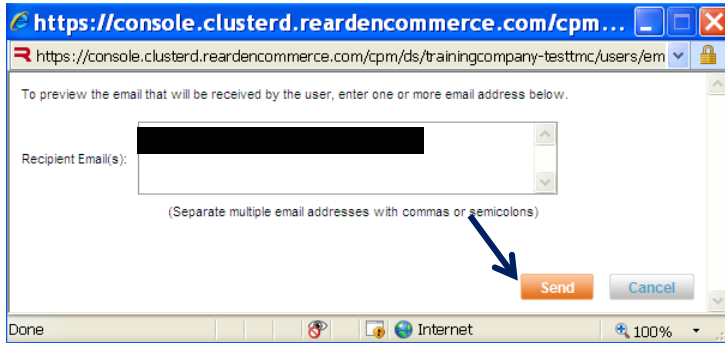
The screenshot shows the same user creation form, but with the following changes:

- Activate Account:
- Password Options:
  - Have system generate random password
  - Pre-define password for user
- Fields for Pre-define password:
  - Password:
  - Re-enter Password:
- Force user to change password on first login:
- Activation Email:  [Preview Activation Email](#)

Buttons at the bottom: Save User, Save & Add Another, Save & Edit User, Cancel

- **Password:** If Pre-define password for user was selected, this is the password, which must be changed by the user upon first login.
- **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.
- **Activation Email:** Select this checkbox to send the new user an activation email.

- **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.

Partner Dashboard 0 changes not applied

Settings **Users** Services Groups Rules Reports Profiles

### Users | Overview

[Edit a User](#)  
Edit a user's profile information in the same way that a user would.

[Add A New User](#)  
Add a user to the Test TMC domain. This can be a new employee or support account.

[Single User Activation](#)  
Activate a specific set of users. Reset user passwords.

[Single User Deactivation](#)  
Deactivate a specific set of users.

[Single User Registration Reminder](#)  
Send reminder emails to a specific set of users.

[Bulk User Activations and Reminders](#)  
Activate or Remind multiple users by group.

[Impersonate a User](#)  
Pretend to be a user and carry out operations under that facade.

[User Statistics](#)  
Display user statistics.

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

Settings **Users** Services Groups Rules Reports Profiles

[Back to Overview](#)

### Users | Edit A User

**Search Criteria**

To search for a user by entering content into one or more of the forms below. The more information you are able to enter, the more refined your search will be.

First Name:

Last Name:

User Name:

Email:

External ID:

Account Type: All

Active users

Manually added users

**Search Results**

| Name | User Name | Email | Status | Status In Company | Type | Source |
|------|-----------|-------|--------|-------------------|------|--------|
|      |           |       |        |                   |      |        |

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.

[Back to Overview](#)

## Users | Edit A User

### Search Criteria

To search for a user by entering content into one or more of the forms below. The more information you are able to enter, the more refined your search will be.

First Name:

Last Name:

User Name:

Email:

External ID:

Account Type:  ▼

Active users

Manually added users

### Search Results

| Name ▼                       | User Name   | Email      | Status | Status In Company | Type    | Source         |
|------------------------------|-------------|------------|--------|-------------------|---------|----------------|
| <a href="#">Bland, Chris</a> | testusertmc | [REDACTED] | Active | Active            | Support | Manually Added |

**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.

Partner Dashboard

Settings Users Services Groups Rules Reports Profiles

[Back to Overview](#)

## Users | Edit A User

\*There are more than 200 users who match the search criteria (Please be more specific in your search)

### Search Criteria

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

The screenshot shows the 'Users | Christine Bland' page in the DEEM TRAVEL Partner Dashboard. The page is divided into a top navigation bar with tabs for Settings, Users, Services, Groups, Rules, Reports, and Profiles. The 'Users' tab is selected. Below the navigation bar, there is a breadcrumb 'Users | Christine Bland' and a link 'Back to Edit a User'. The page is organized into a left sidebar and a main content area. The sidebar contains several sections: 'Support Information' with a link to 'Support Information'; 'Account Permissions' with a link to 'Account Permissions'; 'Profile' with links to 'Personal and Employee Info', 'Addresses and Phone Numbers', 'Emergency Contact', and 'Payment Cards'; 'Service Preferences' with a link to 'Travel'; 'Notifications' with a link to 'Notifications'; 'Delegates' with a link to 'Delegates'; and 'System Settings' with a link to 'Display Settings'. The main content area displays the user's details in a list format: Title, First Name, Last Name, User Name, External ID, Job Title, Email, Business Phone, Mobile Phone, Assigned Expense approver, Expense Approver permission, Expense Payer permission, Assigned Shopping approver, Shopping Approver permission, Assigned Travel approver, and Travel Approver permission. At the bottom right of the main content area, there is an 'Impersonate' button.

- **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:**

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

**Service Preferences:**

- **Travel**

**Notifications:**

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

**Delegates:**

- **Delegates**

**System Settings:**

- **Display Settings**

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

| User Details                  |                              |                              |                           |
|-------------------------------|------------------------------|------------------------------|---------------------------|
| Login Name                    | testusertmc                  | Email Notifications          | [REDACTED]                |
| 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:**

The screenshot shows a 'Personal Info' form with the following fields and values:

- Title: Mrs. (dropdown)
- First Name\*: Chris (text input)
- Middle Name: (empty text input)
- Last Name\*: Bland (text input)
- Suffix: (empty text input)
- Username\*: testusertmc (text input)
- Date of Birth\*: \*\* \*\* \*\* (masked date)
- Gender: Female (dropdown)
- Profile Pin: (empty text input)

Below the Date of Birth field, there is a note: "Date of birth displayed as \*\* for security reasons".

---

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

---

- **Employee Information:**

The screenshot shows an 'Employee Info' form with the following fields and values:

- VIP indicator:  Yes,  No
- Employee ID: (empty text input)
- External ID\*: 454545 (text input)
- Employee Type\*: (empty text input)
- Employee Status: Active
- Job Title: (empty text input)
- Job Level: (empty text input)
- Manager ID: (empty text input)
- Approver ID: (empty text input)
- Cost Center: -----
- Department Code: (empty text input)
- Department Name: (empty text input)
- Division: (empty text input)
- Business Unit: (empty text input)
- Company Name: (empty text input)
- Additional Information: -----
- Cost Center\*: (empty text input with help icon)

At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

---

**Note:** Fields on the profile may appear differently depending on site configuration and features enabled.

---

**DEEM TRAVEL – PARTNER DASHBOARD TRAINING: MODULE 1**

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:**

The screenshot shows a form titled "Business" with two main sections: "Address" and "Business contact info".

**Address section:**

- Country: United States (dropdown)
- Street address: 1101 E Hillsdale Blvd
- Apartment / Suite: (empty)
- MailStop: (empty)
- City: Foster City
- State: California (dropdown)
- ZIP code: 94404

**Business contact info section:**

- Business Phone: Country code (1), Number (8505551212), Extension (empty)
- US/CA/PR/UM: (dropdown)
- Business Fax: Country code (1), Number (empty)
- US/CA/PR/UM: (dropdown)
- Business Mobile: Country code (1), Number (empty)
- US/CA/PR/UM: (dropdown)
- Business Email\*: (redacted)
- Groupware ID\*: (redacted)

**Confirmation Emails section:**

- Send to:  Profile email: (redacted)  A different email address: (empty)

- **Home:**

The screenshot shows a form titled "Home" with two main sections: "Address" and "Personal info".

**Address section:**

- Country: United States (dropdown)
- Street address: (empty)
- Apartment / Suite: (empty)
- MailStop: (empty)
- City: (empty)
- State: - select - (dropdown)
- ZIP code: (empty)

**Personal info section:**

- Home Phone: Country code (1), Number (empty)
- US/CA/PR/UM: (dropdown)
- Home Email: (empty)

At the bottom right of the form are two buttons: "Save" (orange) and "Cancel" (grey).

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.

The screenshot shows a form titled "Emergency Contact Info" with a "\*Required" label. The form contains the following fields: Full Name (text input), Relationship (dropdown menu), Email (text input), Country (dropdown menu, currently set to "United States"), Street address (text input), Apartment / Suite (text input), MailStop (text input), City (text input), State (dropdown menu, currently set to "- select -"), ZIP code (text input), Primary Phone Number (table with columns: Country code, Number, Extension), and Secondary Phone Number (table with columns: Country code, Number, Extension). At the bottom right, there are "Save" and "Cancel" buttons.

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 screenshot shows the "Payment Cards" section with a table header: Name, Card type, Card number, and Expiration. Below the header is a link "Add payment card" with a blue arrow pointing to it. Underneath is a section titled "Default payment cards" with a dotted line separator. It lists four card types: Airline payment card, Hotel payment card, Rental Car payment card, and Train payment card, each with the text "No payment cards for this user." At the bottom right, there are "Save" and "Cancel" buttons.

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

**Payment Card Information**

\* Required

Corporate Card

Name this card\*

Card type\*

American Express

Card number\*

Expiration date\*

July 2010

Cardholder's name\*

Jessica Stephens

**Billing Address**

Country

United States

Street address

Apartment / Suite

Mail Stop

City

State

- select -

ZIP code

**Expiration Alert**

Display alert

1 month prior to expiration

Save Cancel

**Payment Card Information:**

- **Corporate Card:** Select this check box if this is a Corporate Card.
- **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.
- **Card Type:** (Required) Select the Card Type from the drop down list.
- **Card number:** (Required) Enter the Card Number without dashes.
- **Expiration date:** (Required) Select the Expiration Month and Year from the drop down list.

**Billing Address:**

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

---

- **Street address:** Enter the Billing Address street address.
- **Apartment / Suite:** Enter the Billing Address apartment / suite number.
- **Mailstop:** Enter the Billing Address mailstop.
- **City:** Enter the Billing Address city.

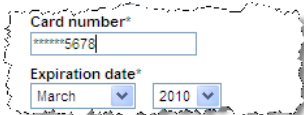


- **State:** Select the Billing Address state from the drop down list.
- **Zip code:** Enter the Billing Address zip code.

**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.

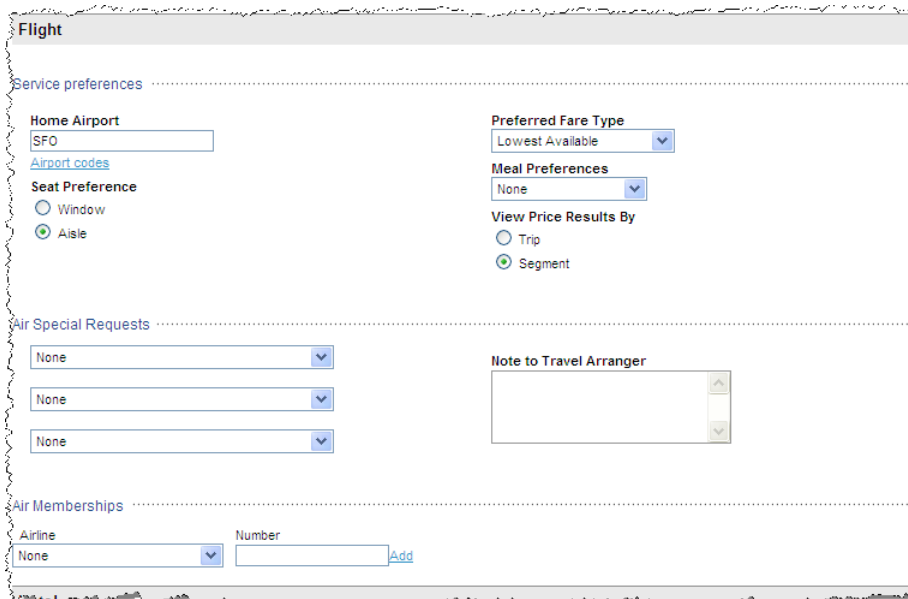


Card number\*  
\*\*\*\*\*5678

Expiration date\*  
March 2010

18. Click **Travel** to view / edit the travel preference information. The page is divided into 5 sections.

- **Flight:**



**Flight**

Service preferences

Home Airport: SFO

Preferred Fare Type: Lowest Available

Meal Preferences: None

Seat Preference:  Window  Aisle

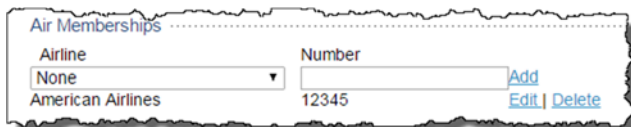
View Price Results By:  Trip  Segment

Air Special Requests: Three dropdown menus, all set to None.

Note to Travel Arranger: Text area.

Air Memberships: Airline: None, Number: [input], Add link.

- 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.



Air Memberships

Airline: None

Number: 12345

Add Edit Delete

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

○ **Hotel:**

**Hotel**

Hotel Amenities .....  
None ▾  
None ▾  
None ▾

Hotel Special Requests .....  
None ▾  
None ▾  
None ▾

Hotel Memberships .....  
Hotel Number  
None 12345 Add  
Baymont Inns Edit Delete

- 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.

○ **Rental Car:**

**Rental Car**

Options .....  
Default Car Size  
Intermediate ▾

Car Special Requests .....  
None ▾  
None ▾  
None ▾

Car Memberships .....  
Rental Car company Number  
None Add  
Edit Delete

**Train**

- 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:**

- 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.

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

- 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.

The screenshot shows a web form titled "Information" with a "< back to search results" link at the top right. The form contains the following fields:

- Country\***: A dropdown menu with "United States" selected.
- Expiration date**: Two dropdown menus for month and year, showing "July" and "2010".
- Number\***: An empty text input field.
- Visa type**: A dropdown menu with "--" selected.
- Display alert**: A dropdown menu with "Never" selected.

At the bottom right of the form are two buttons: "Save" (orange) and "Cancel" (grey).

- 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.

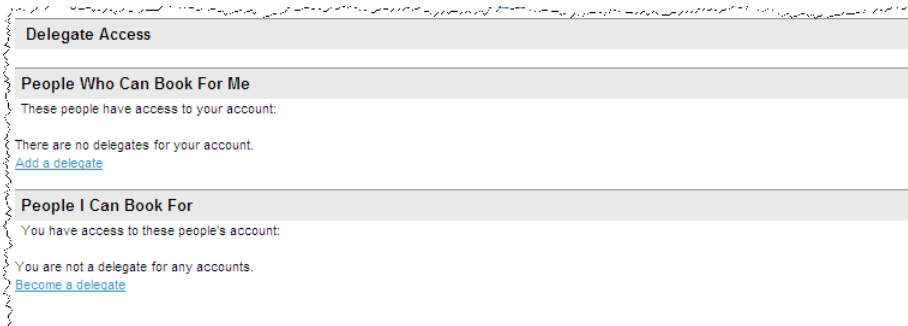
The screenshot shows a web form titled "Additional Documents". It contains two input fields:

- Redress**: A text input field with an information icon (i) to its left.
- Known Traveler Number**: A text input field with an information icon (i) to its left.

At the bottom right of the form are two buttons: "Save" (orange) and "Cancel" (grey).

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- 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
- 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 module.
- 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.

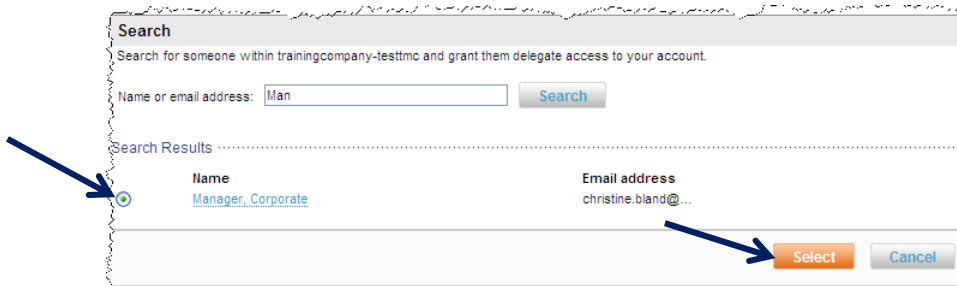
---

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

## DEEM TRAVEL – PARTNER DASHBOARD TRAINING: MODULE 1

- 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.

**Search**  
Search for someone within trainingcompany-testtmc and become a delegate for them.

Name or email address:

**Search Results**

| Name  | Email address       |
|---|---------------------|
| <input checked="" type="radio"/> <a href="#">Doe, James</a> | james.doe@rearde... |

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.

**Delegate Access**

**People Who Can Book For Me**  
These people have access to your account:

| Name                               | Email address       | Action                 |
|------------------------------------|---------------------|------------------------|
| <a href="#">Manager, Corporate</a> | christine.bland@... | <a href="#">Delete</a> |

[Add a delegate](#)

**People I Can Book For**  
You have access to these people's account:

| Name                       | Email address | Action                 |
|----------------------------|---------------|------------------------|
| <a href="#">Doe, James</a> | james.doe@... | <a href="#">Delete</a> |

[Become a delegate](#)

- 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.

**Display Settings**

\* Required

**Date \***  Month Day Year (November 17, 2003)  
 Day Month Year (17 November, 2003)

**Time \***  12 Hour Clock (3:00 PM)  
 24 Hour Clock (15:00)

**Time zone \*** Eastern Daylight Time

**Measurement \***  US / Imperial  
 Metric

**Currency \*** United States Dollar

**Country \*** United States

- o **Date:** Select either Month Day Year or Day Month Year.

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

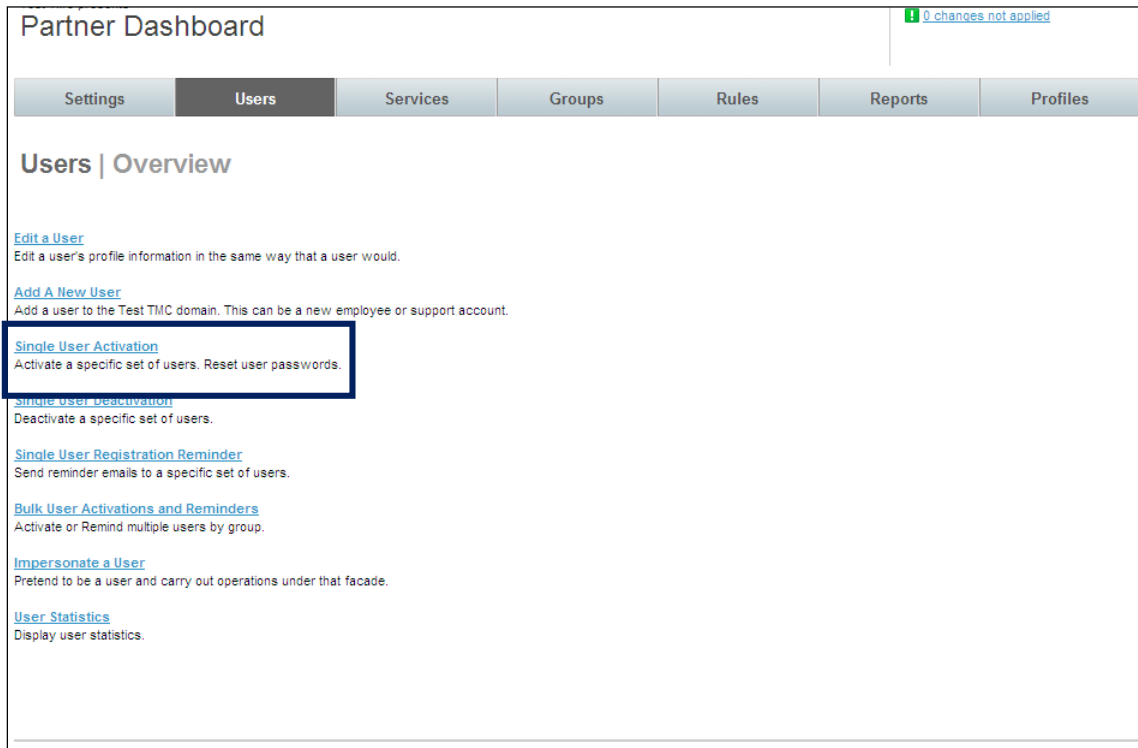
22. Click **Save** to save the Display Settings or click **Cancel** if no changes were made.

### 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.

## DEEM TRAVEL – PARTNER DASHBOARD TRAINING: MODULE 1

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

Settings Users Services Groups Rules Reports Profiles

[Back to Overview](#)

### Users | Activate Users

Basic Search  Advanced Search

First Name:

Last Name:

User Name:

Email:

Employee ID:

Account Type: All

Show only manually added users

Show only inactive users

#### Search Results

| Select                             | Name                            | User Name | Email     | Status     | Status In Company | Type    | Source         |
|------------------------------------|---------------------------------|-----------|-----------|------------|-------------------|---------|----------------|
| <input type="button" value="Add"/> | <a href="#">Jordan, Michael</a> | mjordan   | mj@rc.com | Not Active | Active            | Support | Manually Added |

#### Selected Results

| Select | Name | User Name | Email | Status | Status In Company | Type | Source |
|--------|------|-----------|-------|--------|-------------------|------|--------|
|        |      |           |       |        |                   |      |        |

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

#### Search Results

| Select                             | Name                            | User Name | Email     | Status     | Status In Company | Type    | Source         |
|------------------------------------|---------------------------------|-----------|-----------|------------|-------------------|---------|----------------|
| <input type="button" value="Add"/> | <a href="#">Jordan, Michael</a> | mjordan   | mj@rc.com | Not Active | Active            | Support | Manually Added |

#### Selected Results

| Select                                | Name                            | User Name | Email     | Status     | Status In Company | Type    | Source         |
|---------------------------------------|---------------------------------|-----------|-----------|------------|-------------------|---------|----------------|
| <input type="button" value="Remove"/> | <a href="#">Jordan, Michael</a> | mjordan   | mj@rc.com | Not Active | Active            | Support | Manually Added |

**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.

**Search Results**

| Select                             | Name                            | User Name | Email     | Status     | Status In Company | Type    | Source         |
|------------------------------------|---------------------------------|-----------|-----------|------------|-------------------|---------|----------------|
| <input type="button" value="Add"/> | <a href="#">Jordan, Michael</a> | mjordan   | mj@rc.com | Not Active | Active            | Support | Manually Added |

---

**Selected Results**

| Select                                | Name                            | User Name | Email     | Status     | Status In Company | Type    | Source         |
|---------------------------------------|---------------------------------|-----------|-----------|------------|-------------------|---------|----------------|
| <input type="button" value="Remove"/> | <a href="#">Jordan, Michael</a> | mjordan   | mj@rc.com | Not Active | Active            | Support | Manually Added |

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

Partner Dashboard
0 changes not applied

Settings
**Users**
Services
Groups
Rules
Reports
Profiles

[Back to Activate Users](#)

### Users | Confirmation

You have selected 1 users to activate (list below). Activation allows the user to access the Test TMC System. To change the user list, click on the cancel button. To continue, click the "Activate Now" button.

**Selected Results**

| Name            | User Name | Email     | Status     | Status In Company | Type    | Source         |
|-----------------|-----------|-----------|------------|-------------------|---------|----------------|
| Jordan, Michael | mjordan   | mj@rc.com | Not Active | Active            | Support | Manually Added |

**Activate Account**

Password Options:

Have system generate random password

Pre-define password for user

Password:

Re-enter Password:

Force user to change password on first login

Activation Email:  Generate Activation Email [Preview Activation Email](#)

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

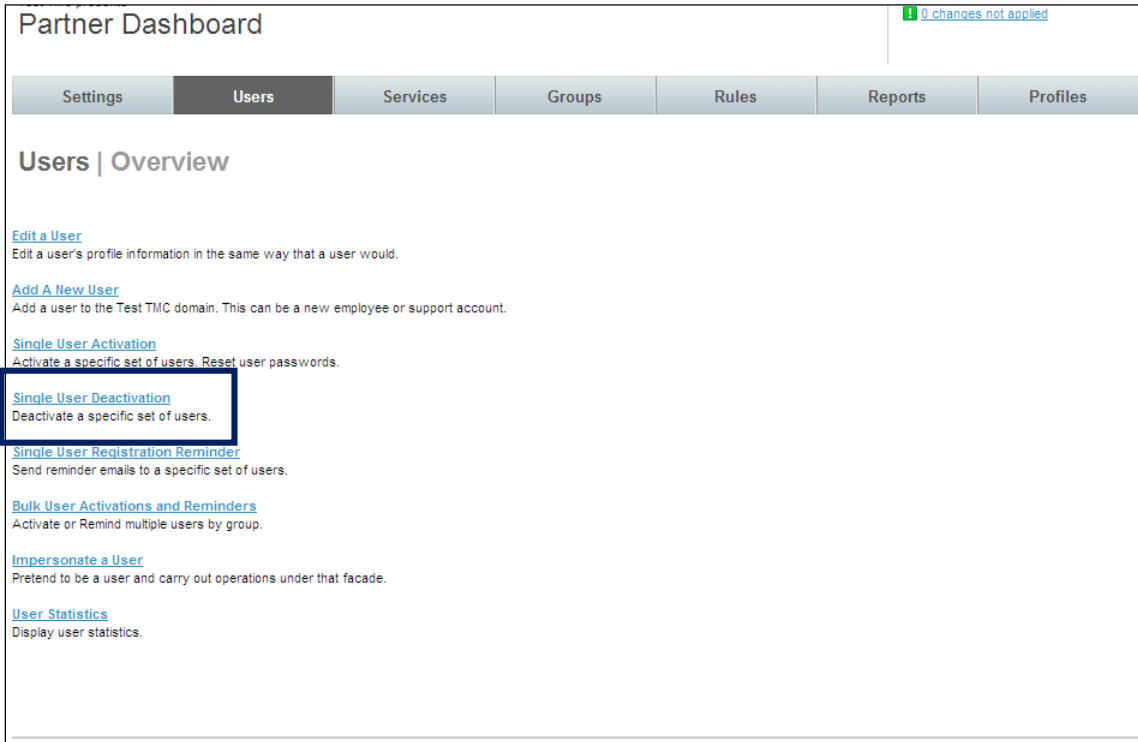
Deactivating a user does not delete the user from the database. If a user is accidentally deactivated, they can easily be reinstated.

The process to deactivate a user is very similar to activating a user.

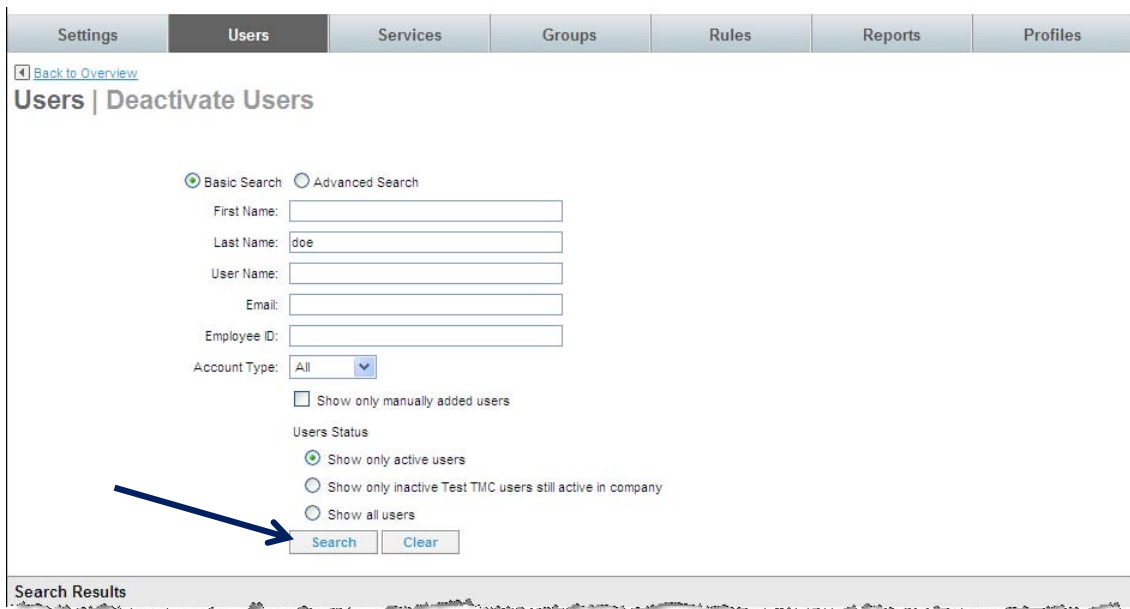
To **Deactivate a Single User:**

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.

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



- 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.

The screenshot shows the 'Users | Deactivate Users' page with the following search criteria:

- Basic Search selected
- First Name: madison
- Last Name: (empty)
- User Name: (empty)
- Email: (empty)
- Employee ID: (empty)
- Account Type: All
- Show only manually added users: unchecked
- Users Status:
  - Show only active users: selected
  - Show only inactive Test TMC users still active in company: unselected
  - Show all users: unselected

The Search Results table is as follows:

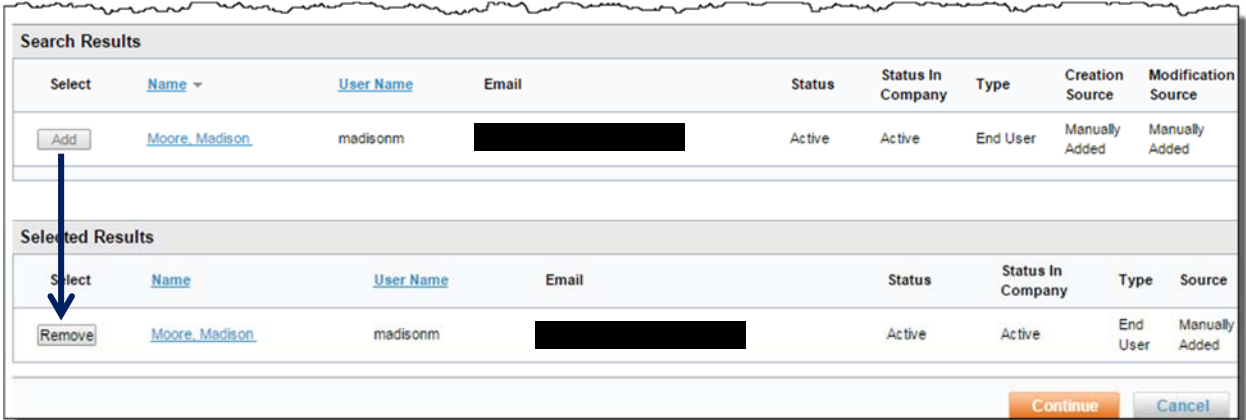
| Select              | Name                           | User Name | Email      | Status | Status In Company | Type     | Creation Source | Modification Source |
|---------------------|--------------------------------|-----------|------------|--------|-------------------|----------|-----------------|---------------------|
| <a href="#">Add</a> | <a href="#">Moore, Madison</a> | madisonm  | [REDACTED] | Active | Active            | End User | Manually Added  | Manually Added      |

The Selected Results table is currently empty.

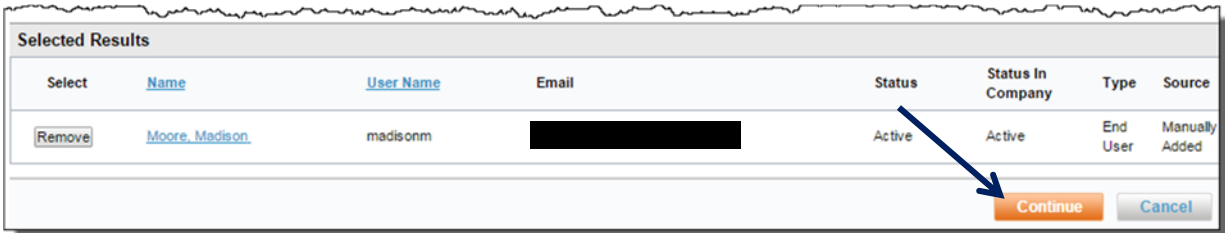
Buttons: Search, Clear, Continue, Cancel

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

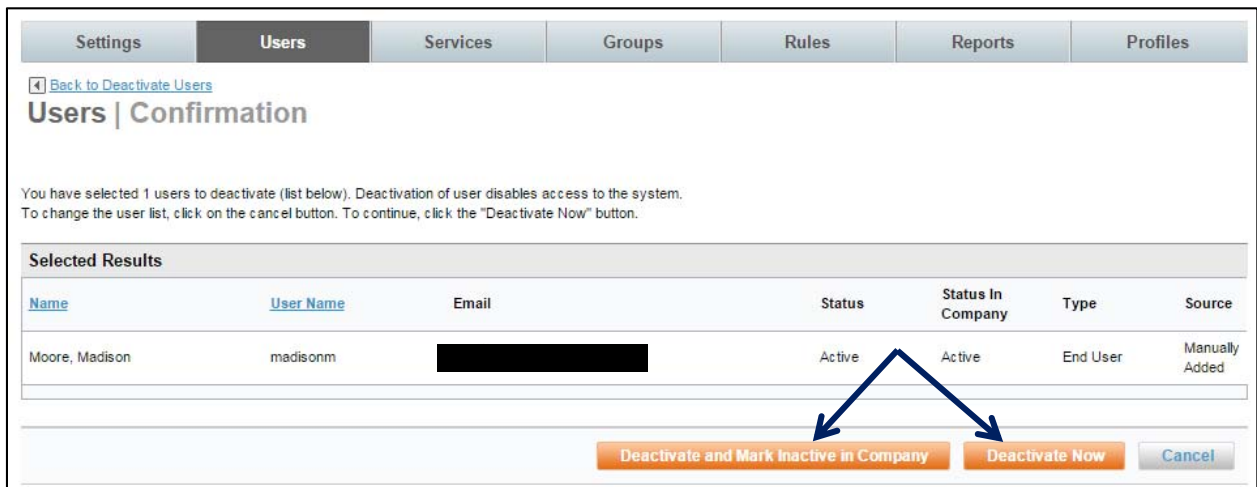
**Note:** Remove a name from the **Selected Results** list by clicking the **Remove** button beside the user.



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.

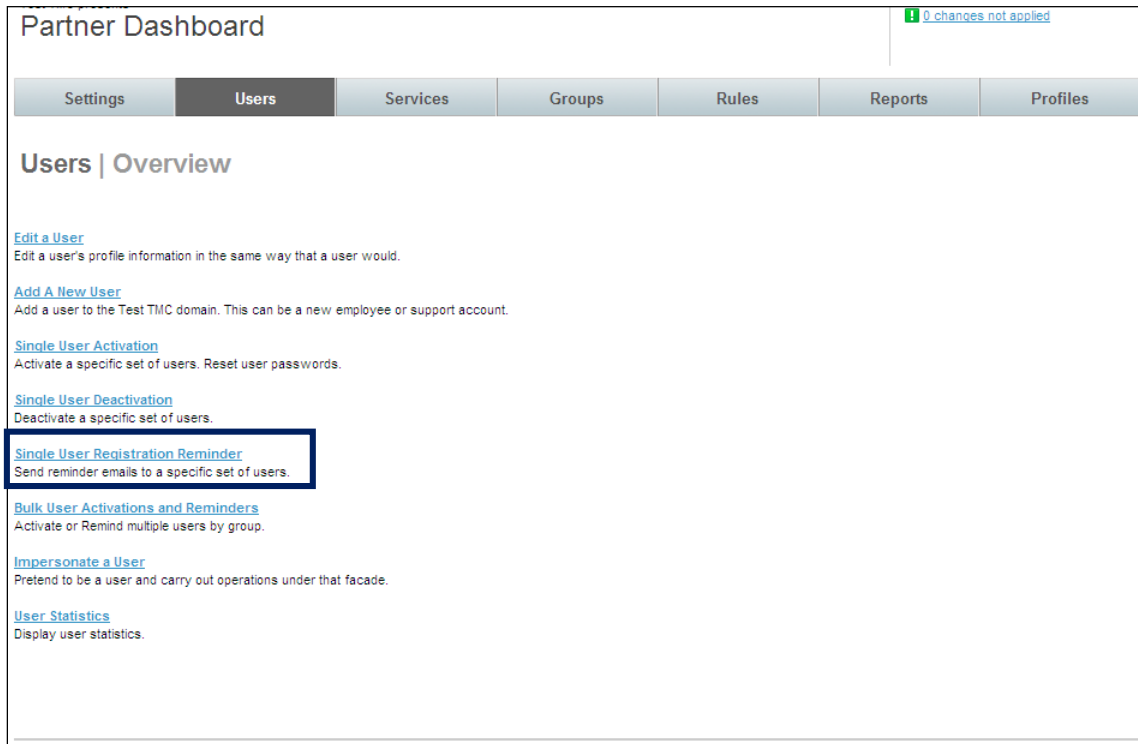
### 3.1.6 Single User Registration Reminder

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.

Settings Users Services Groups Rules Reports Profiles

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## Users | Remind Users

Basic Search  Advanced Search

First Name:

Last Name:

User Name:

Email:

Employee ID:

Account Type:

Show only manually added users

Show only users who have not registered

Show only active users

Search Results

| Status |
|--------|
|--------|

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.

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

Settings **Users** Services Groups Rules Reports Profiles

[Back to Overview](#)

### Users | Remind Users

Basic Search
  Advanced Search

First Name:   
 Last Name:   
 User Name:   
 Email:   
 Employee ID:   
 Account Type:

Show only manually added users  
 Show only users who have not registered  
 Show only active users

| Search Results                     |                              |            |             |        |                   |         |                 |                     |  |
|------------------------------------|------------------------------|------------|-------------|--------|-------------------|---------|-----------------|---------------------|--|
| Select                             | Name                         | User Name  | Email       | Status | Status In Company | Type    | Creation Source | Modification Source |  |
| <input type="button" value="Add"/> | <a href="#">Bear, Vernon</a> | vernonbear | vb@acme.com | Active | Active            | Support | Manually Added  | Manually Added      |  |

| Selected Results |      |           |       |        |                   |      |        |  |  |
|------------------|------|-----------|-------|--------|-------------------|------|--------|--|--|
| Select           | Name | User Name | Email | Status | Status In Company | Type | Source |  |  |

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

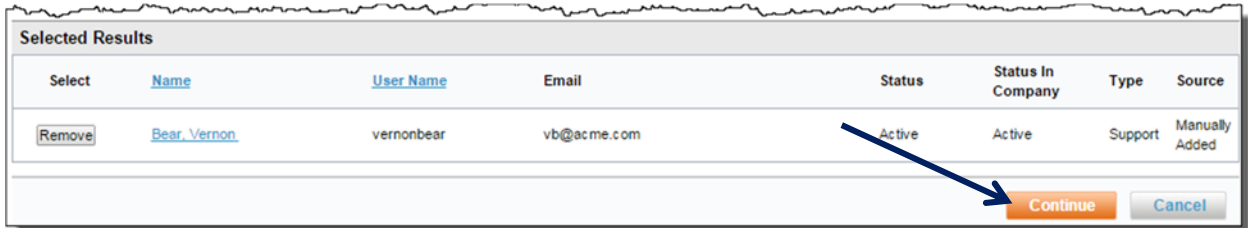
| Search Results                     |                              |            |             |        |                   |         |                 |                     |  |
|------------------------------------|------------------------------|------------|-------------|--------|-------------------|---------|-----------------|---------------------|--|
| Select                             | Name                         | User Name  | Email       | Status | Status In Company | Type    | Creation Source | Modification Source |  |
| <input type="button" value="Add"/> | <a href="#">Bear, Vernon</a> | vernonbear | vb@acme.com | Active | Active            | Support | Manually Added  | Manually Added      |  |

| Selected Results                      |                              |            |             |        |                   |         |                |  |  |
|---------------------------------------|------------------------------|------------|-------------|--------|-------------------|---------|----------------|--|--|
| Select                                | Name                         | User Name  | Email       | Status | Status In Company | Type    | Source         |  |  |
| <input type="button" value="Remove"/> | <a href="#">Bear, Vernon</a> | vernonbear | vb@acme.com | Active | Active            | Support | Manually Added |  |  |

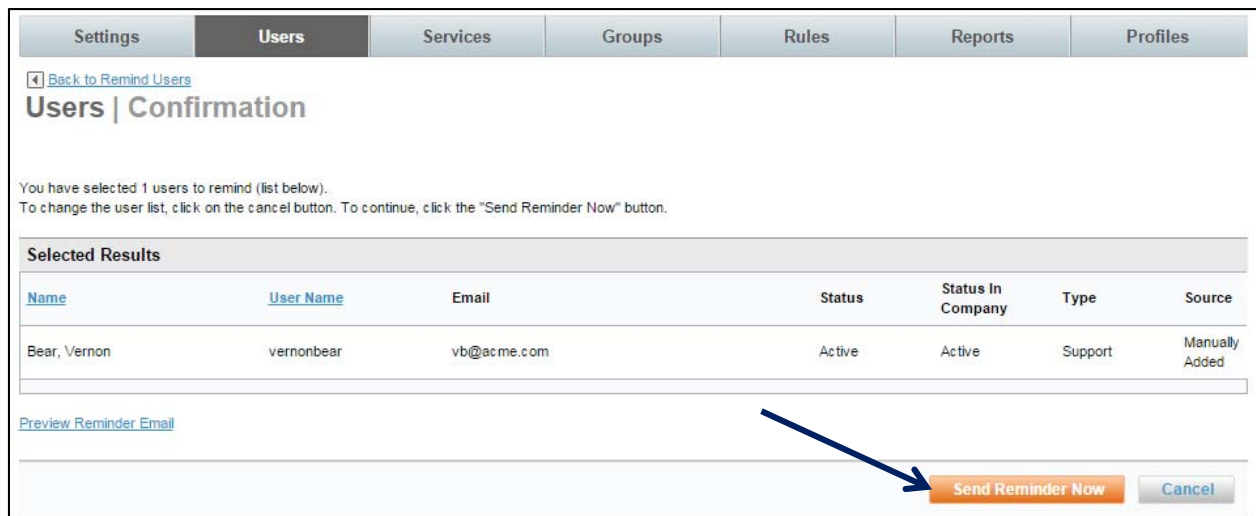
**Note:** Remove a name from the list by clicking the **Remove** button beside the user.



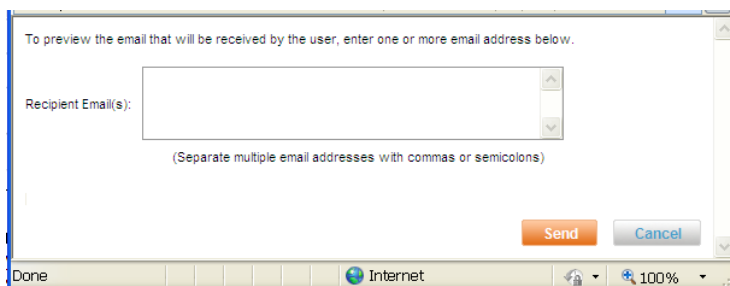
- Once all users to process have been selected, click the **Continue** button. Search for and add users to the **Selected Results** until the **Continue** button has been clicked.



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



- 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.



- 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.

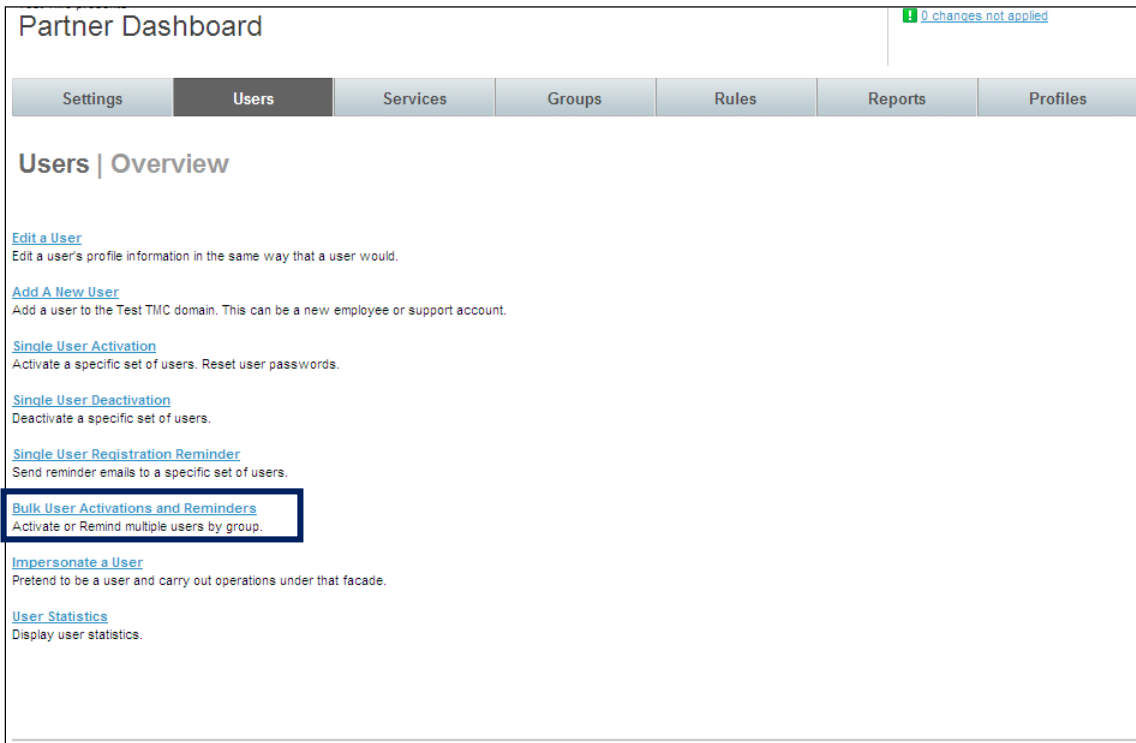
Bulk User Activation is used to activate several users, a group of users or most often to reset passwords. It is important to pay close attention to search criteria selected.

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.

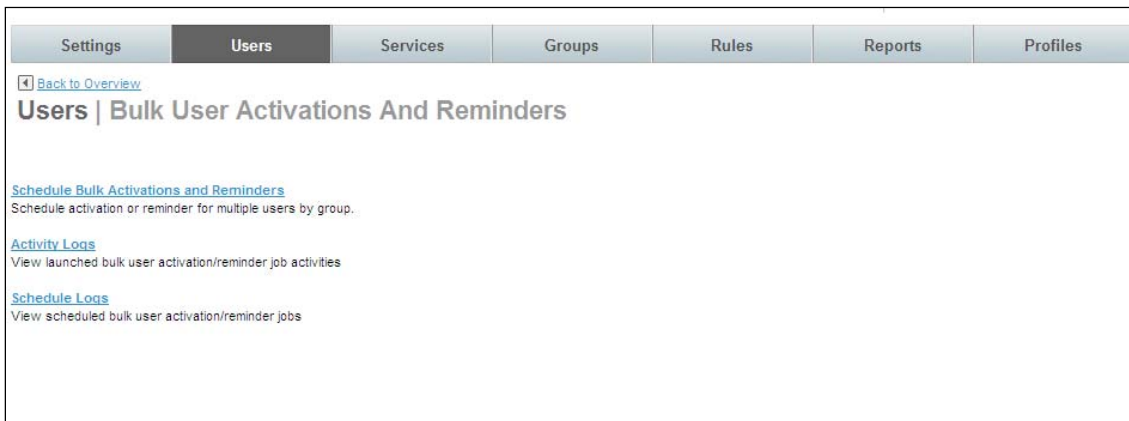
The process to send Bulk User Activations and Reminders is very similar to the Single User Activation and Single User Registration Reminder process.

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:

- **Schedule Bulk Activations and Reminders:** Click this link to schedule activations or reminders for multiple users by group
- **Activity Logs:** View previously submitted bulk user activation or reminder job activities.
- **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:

- **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...** (dropdown)  
 Start Date: Aug (dropdown) 13 (dropdown) (calendar icon)  
 Time: 9 AM (dropdown) : 43 (dropdown) (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** (dropdown)  
 Start Date: Aug (dropdown) 13 (dropdown) (calendar icon)  
 Time: 9 AM (dropdown) : 43 (dropdown) (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 (dropdown) 1 (dropdown) (calendar icon) (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** (dropdown)  
 Start Date: Aug (dropdown) 13 (dropdown) (calendar icon)  
 Time: 9 AM (dropdown) : 43 (dropdown) (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 (dropdown) 1 (dropdown) (calendar icon) (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:

- **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.

Schedule: Weekly   
 Occurs On:  Sun  Mon  Tue  Wed  Thu  Fri  Sat  
 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:

- **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.

Schedule: Bi-Weekly   
 Occurs On:  Sun  Mon  Tue  Wed  Thu  Fri  Sat  
 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:

- **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.

Schedule: Monthly  
Start Month: January  
Occurs On (Day Of Month): 13th  
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:

- **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.

Job Options

Job Description: Bulk User Activation Job

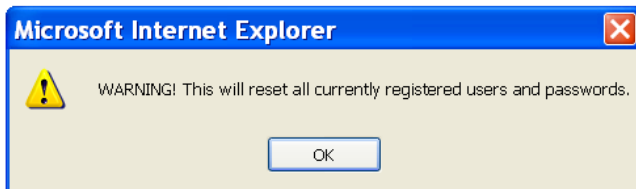
Email report to:

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

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

The screenshot shows a web form titled "Activate/Remind Options". At the top, there are two radio buttons: "Activate" (which is selected) and "Remind". Below this is a "Group Name" dropdown menu set to "Department A Group". There are four checkboxes: "Include inactive users (Default, recommended)" is checked; "Include activated unregistered users" is unchecked; "Include registered users (WARNING! This will reset all currently registered users and passwords.)" is unchecked; and "Include new users added after" is unchecked. At the bottom, there are date and time pickers. The date is set to a blank field, and the time is set to "12 AM : 00 (Pacific Time)".

- **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**.



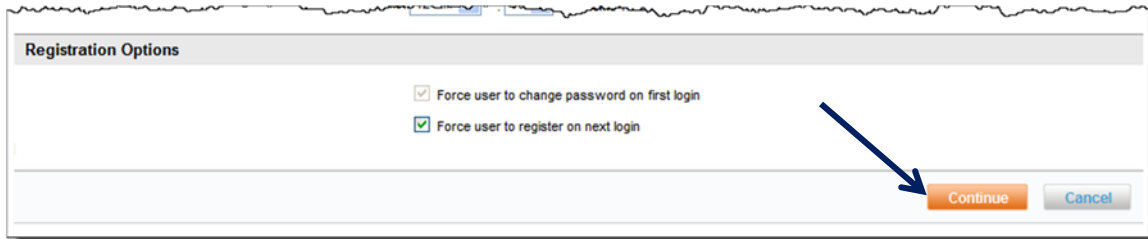
- Include registered users added after: Select a Date including year and Time.
- Select the **Remind** button if this job is to send reminder emails.

The screenshot shows the same "Activate/Remind Options" form, but now the "Remind" radio button is selected. All other elements, including the "Group Name" dropdown, checkboxes, and date/time pickers, remain the same as in the previous screenshot.

- **Group Name:** Select a group of users from the drop down list.

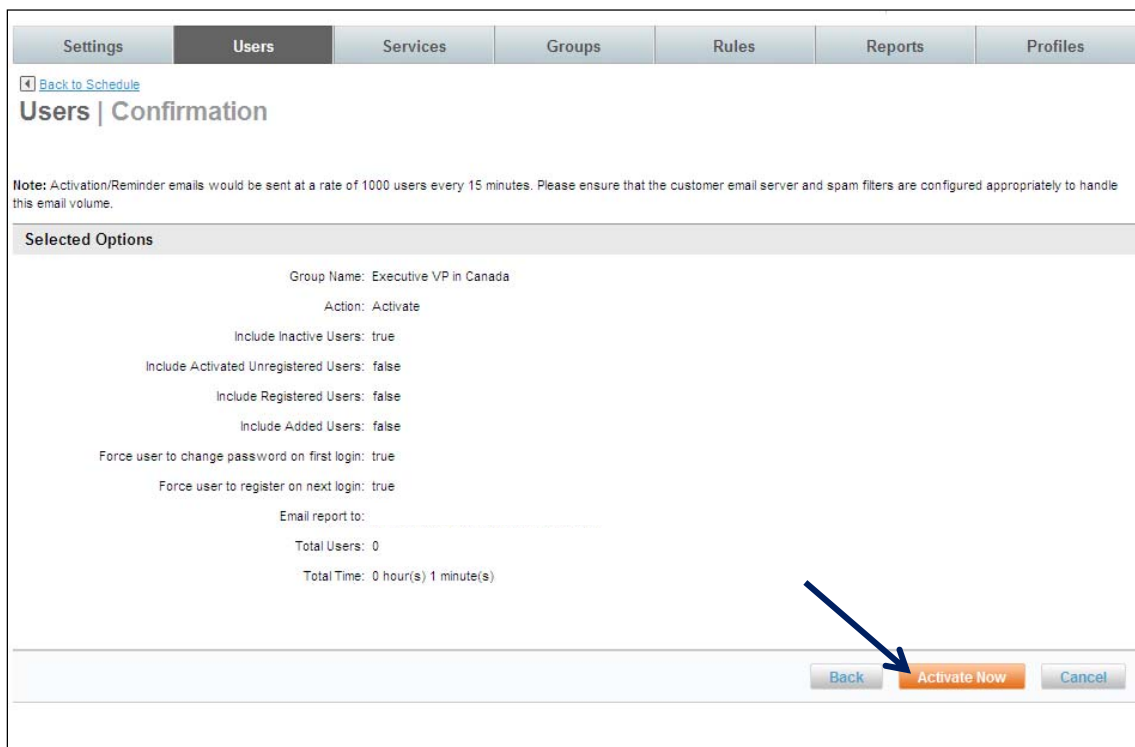
- **Include registered users added after:** Select a **Date** including year and **Time**. Notice this is the only available option when the **Remind** radio button is selected.

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



- 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:



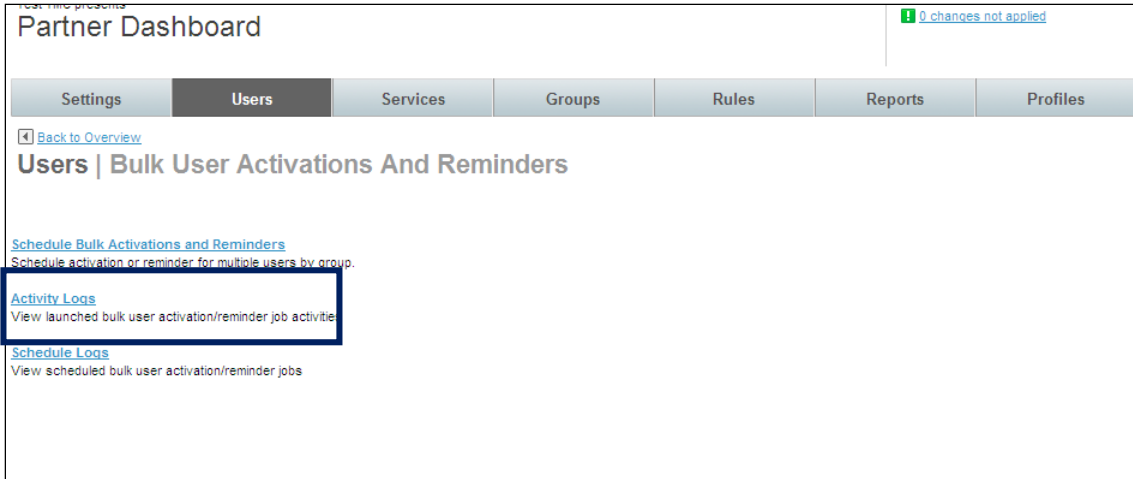
3. Click **Activate Now**, or click **Back** to select a different search criteria or **Cancel** to cancel the process.



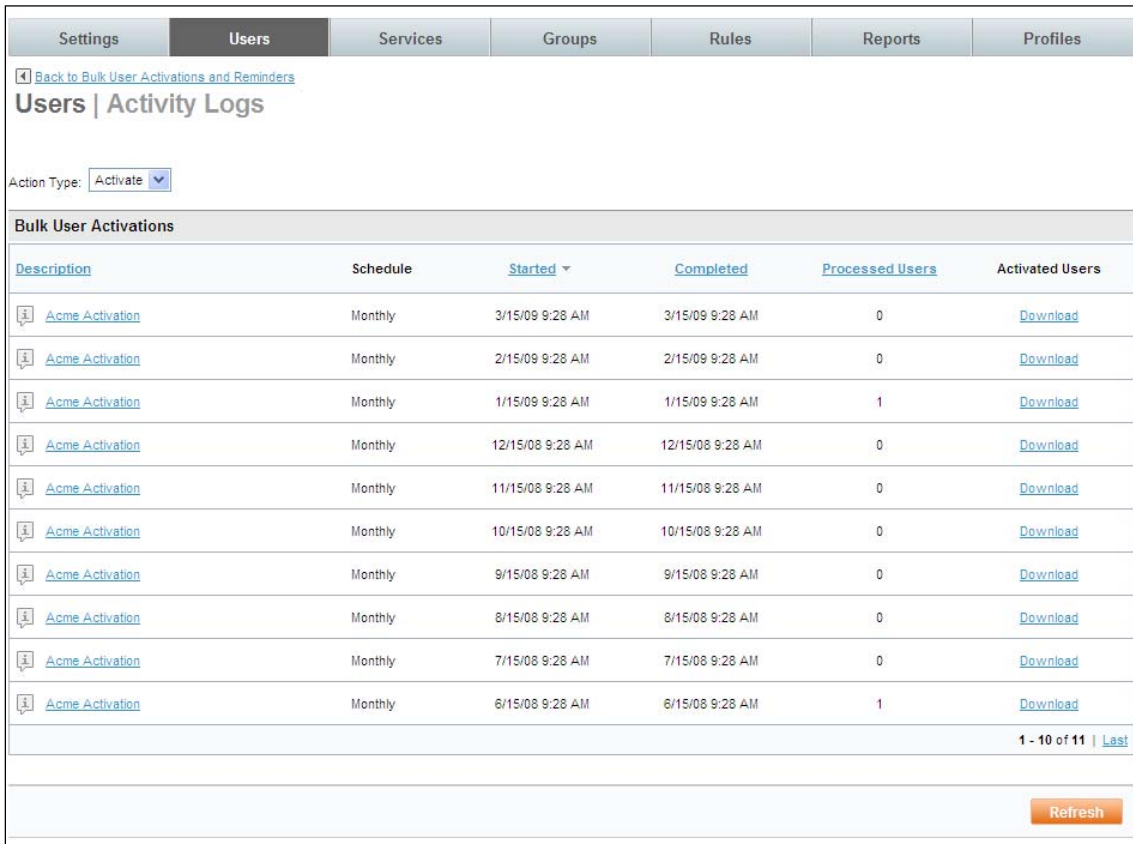
### 3.1.7.2 Activity Logs

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:**
  - **Activate:** Displays a list of activation 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.
- **Activated Users:** Provides a link to download a list of activated users.

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

The screenshot shows a web interface with a navigation bar containing 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. The 'Users' tab is active. Below the navigation bar, there is a breadcrumb link 'Back to Bulk User Activations and Reminders' and a heading 'Users | Activity Logs'. The main content area displays the following job details:

- 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:

At the bottom right of the content area, there are two buttons: 'Refresh' (orange) and 'Back' (blue).

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

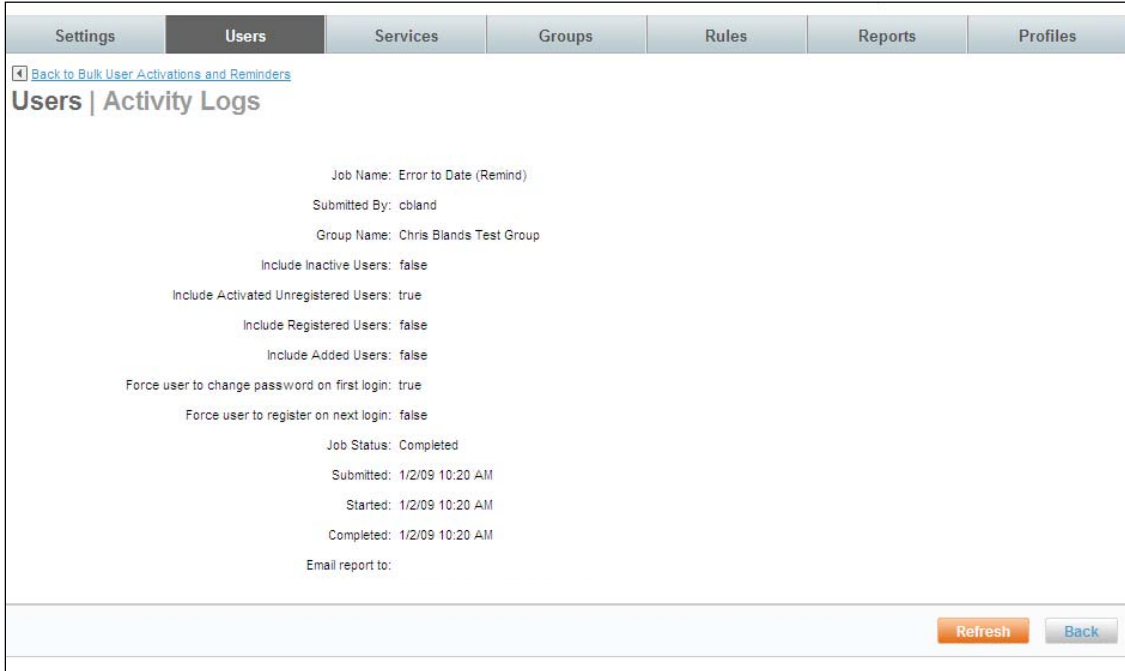
The screenshot shows the same web interface as above, but with the 'Action Type' dropdown menu set to 'Remind'. Below the dropdown, there is a heading 'Bulk User Reminders' and a table with the following data:

| Description                           | Schedule    | Started         | Completed       | Processed Users | Reminded Users           |
|---------------------------------------|-------------|-----------------|-----------------|-----------------|--------------------------|
| <a href="#">Error to Date</a>         | Now         | 1/2/09 10:20 AM | 1/2/09 10:20 AM | 2               | <a href="#">Download</a> |
| <a href="#">Reminder E-mail 27APP</a> | Once, on... | 4/27/08 6:00 PM | 4/27/08 6:00 PM | 0               | <a href="#">Download</a> |
| <a href="#">Training Activation</a>   | Now         | 4/13/08 4:02 PM | 4/13/08 4:02 PM | 6               | <a href="#">Download</a> |

At the bottom right of the content area, there is a 'Refresh' button (orange).

- **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:



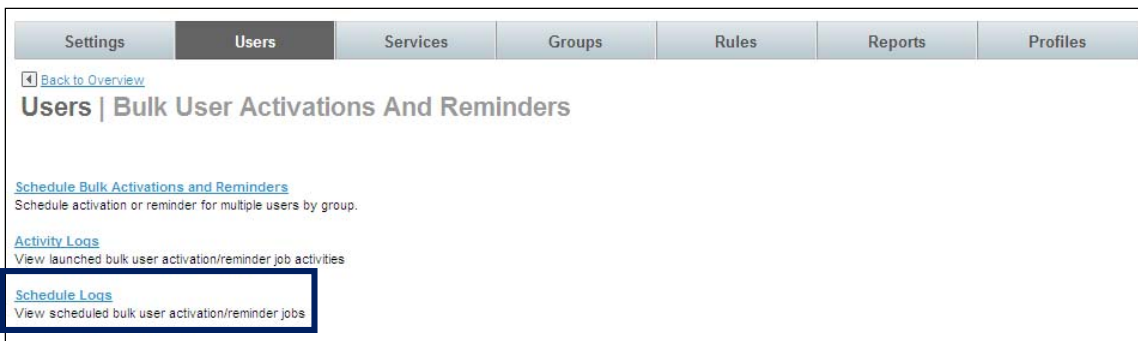
**Note:** A job can be “watched” as it is running by clicking the **Refresh** button.

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

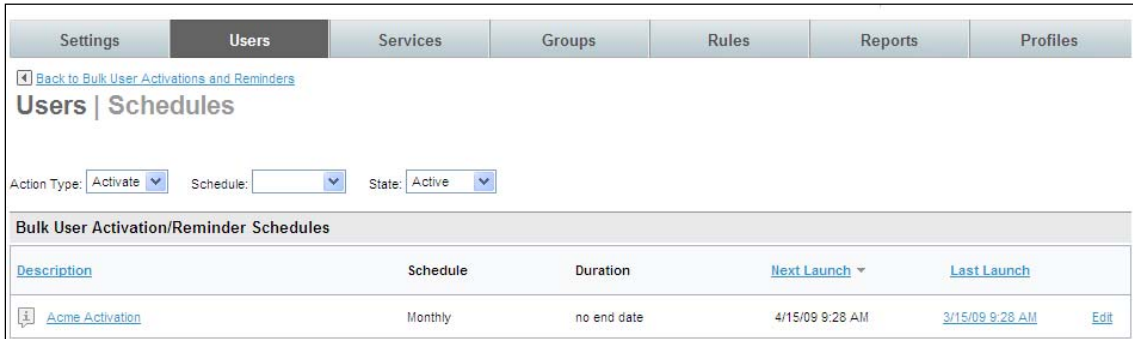
### 3.1.7.3 Schedule Logs

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** link from the **Users | Bulk User Activations and Reminders** page.



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



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

3. Click the **Edit** link.



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

Settings Users Services Groups Rules Reports Profiles

[Back to Schedules](#)

## Users | Edit Schedule

**Job Options**

Job Description:

Email report to:

[Cancel Job](#) [Save Job](#) [Back](#)

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

4. Click the **Description** link.

| Description                     | Schedule | Duration    | Next Launch     | Last Launch     |                      |
|---------------------------------|----------|-------------|-----------------|-----------------|----------------------|
| <a href="#">Acme Activation</a> | Monthly  | no end date | 4/15/09 9:28 AM | 3/15/09 9:28 AM | <a href="#">Edit</a> |

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.

Partner Dashboard

Settings Users Services Groups Rules Reports Profiles

[Back to Schedules](#)

### Users | Schedule Details

Description: Acme Activation  
 Schedule: Monthly (15th)  
 Duration: no end date  
 State: Active  
 Created 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  
 Created On: 5/13/08 9:13 AM  
 Next: 4/15/09 9:28 AM  
 Email report to:

| Launched Activations/Reminders  |                 |                 |           |                          |
|---------------------------------|-----------------|-----------------|-----------|--------------------------|
| Job Name                        | Started         | Completed       | Status    | Reminded Users           |
| <a href="#">Acme Activation</a> | 3/15/09 9:28 AM | 3/15/09 9:28 AM | Completed | <a href="#">Download</a> |
| <a href="#">Acme Activation</a> | 2/15/09 9:28 AM | 2/15/09 9:28 AM | Completed | <a href="#">Download</a> |
| <a href="#">Acme Activation</a> | 1/15/09 9:28 AM | 1/15/09 9:28 AM | Completed | <a href="#">Download</a> |

- 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.

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

Partner Dashboard 0 changes not applied

Settings **Users** Services Groups Rules Reports Profiles

### Users | Overview

[Edit a User](#)  
Edit a user's profile information in the same way that a user would.

[Add A New User](#)  
Add a user to the Test TMC domain. This can be a new employee or support account.

[Single User Activation](#)  
Activate a specific set of users. Reset user passwords.

[Single User Deactivation](#)  
Deactivate a specific set of users.

[Single User Registration Reminder](#)  
Send reminder emails to a specific set of users.

[Bulk User Activations and Reminders](#)  
Activate or Remind multiple users by group.

**[Impersonate a User](#)**  
Pretend to be a user and carry out operations under that facade.

[User Statistics](#)  
Display user statistics.

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

Settings **Users** Services Groups Rules Reports Profiles

[Back to Overview](#)

### Users | Impersonate User

**Search Criteria**

*To search for a user, enter information in one or more of the following fields.  
You can enter partial letters in any of the fields (e.g., "Jo" in the First Name field.)  
To refine your search, enter more information in a field or in multiple fields.*

First Name:

Last Name:

User Name:

Email:

Employee ID:

Account Type: All

**Search Results**

| Name ▾ | User Name | Email | Status | Status In Company | Type | Source |
|--------|-----------|-------|--------|-------------------|------|--------|
|        |           |       |        |                   |      |        |

- 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.

| Name                         | User Name  | Email       | Status | Status In Company | Type    | Creation Source | Modification Source |
|------------------------------|------------|-------------|--------|-------------------|---------|-----------------|---------------------|
| <a href="#">Bear, Vernon</a> | vernonbear | vb@acme.com | Active | Active            | Support | Manually Added  | Manually Added      |

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.

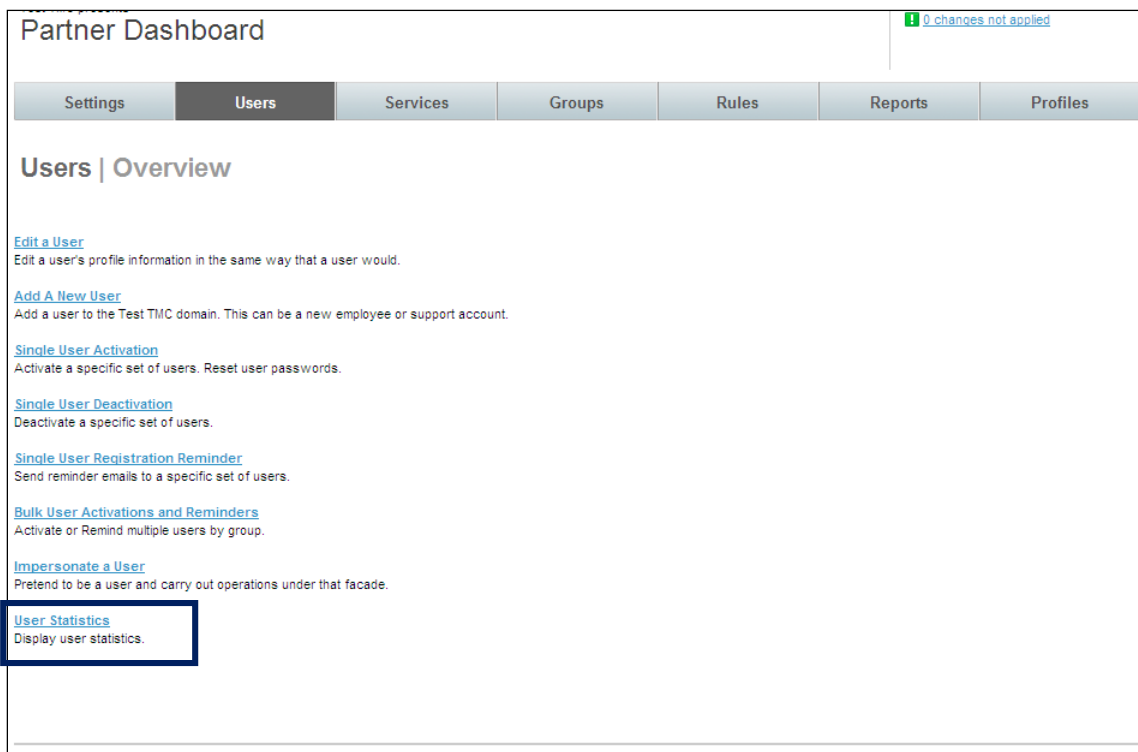


### 3.1.9 User Statistics

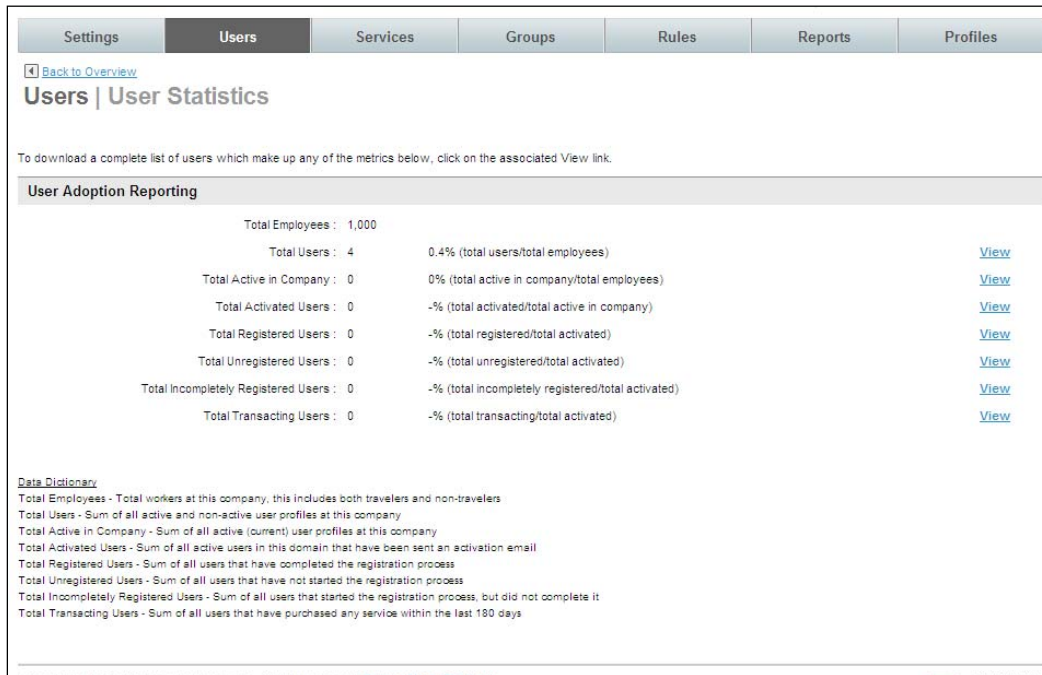
As a site administrator with Adoption Manager Privileges, site statistical data is available.

To view **User Statistics**:

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 **User Statistics** link to view user adoption activity.



5. 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.

---

6. 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 must be in the site administrator's profile.

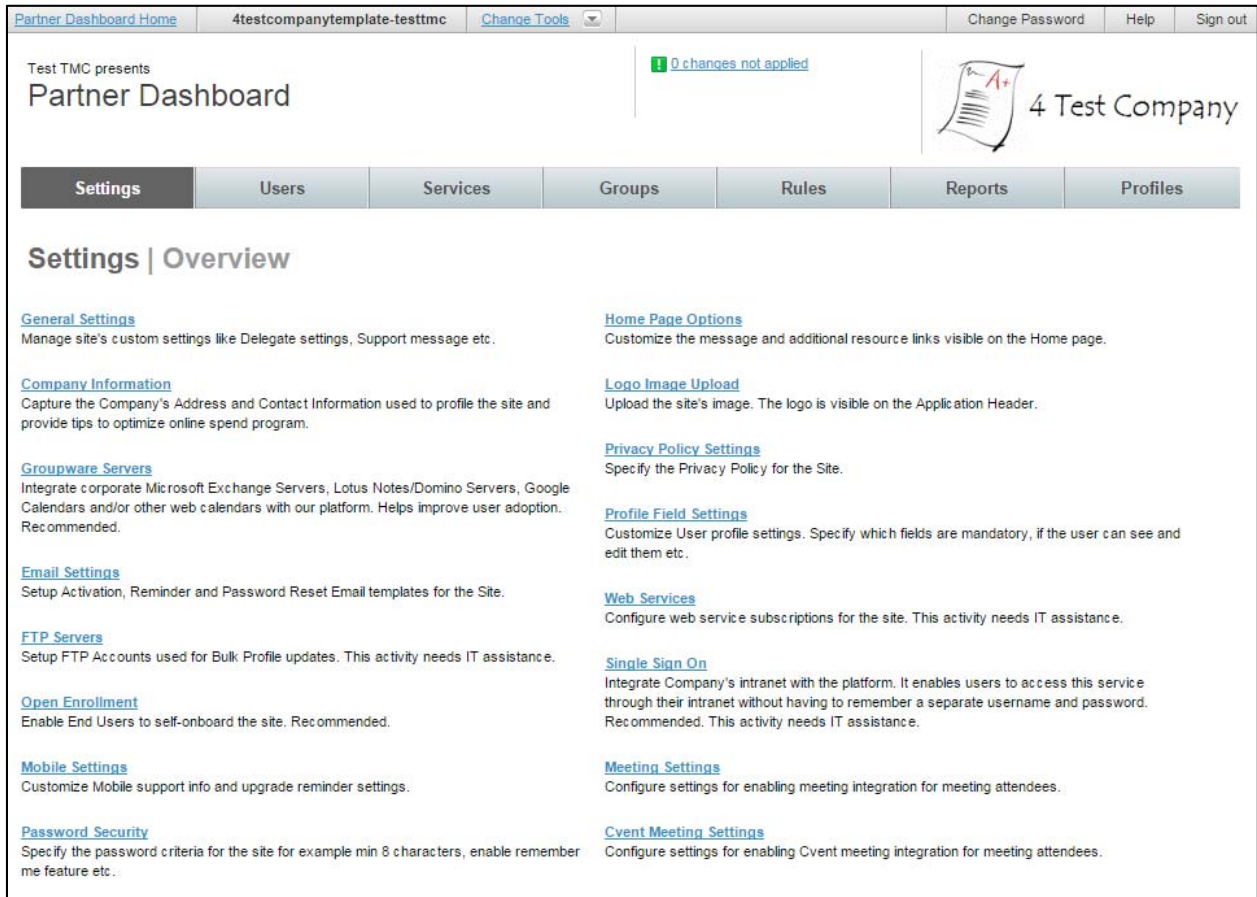
---

### 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.

The screenshot shows the Deem Travel Partner Dashboard interface. At the top, there is a navigation bar with links for 'Partner Dashboard Home', '4testcompanytemplate-testtmc', 'Change Tools', 'Change Password', 'Help', and 'Sign out'. Below this, the dashboard header includes 'Test TMC presents Partner Dashboard' and a notification '0 changes not applied'. A navigation menu contains tabs for 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. The 'Settings' tab is active, and the 'General Settings' link is highlighted with a blue box. The main content area is titled 'Settings | Overview' and lists various configuration sections: 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, and Cvent Meeting Settings.

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

- **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.
- **Spend Management Messages:** This section defines messaging for out of policy trips.
- **Help Desk:** Information to link to a Help Desk is defined in this section.
- **Calendar Attachments:** The software product to use for calendar entries is defined in this section.

**General Settings:**

- **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.
- **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.
- **Enable Daily Payer Notification emails:** This checkbox governs if daily emails will be sent to expense payers.
- **Turn on automated Travel-based email reminders for Expense:** This checkbox governs if email reminders will be sent for travel-based expenses.
- **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.

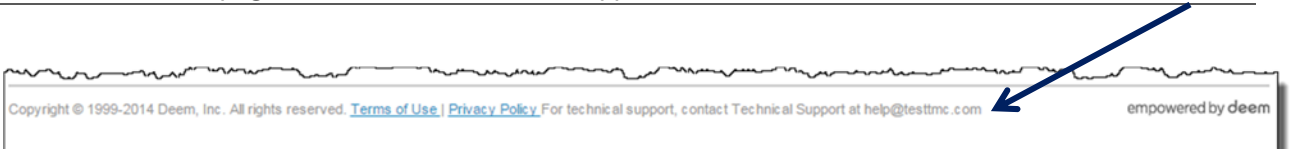
- **Send system emails in HTML format:** This checkbox governs if emails will be sent in HTML or in plain text format. Checking this box sends emails in HTML format, leaving the checkbox unchecked results in emails sent in plain text.
- **Enable Treo wireless access:** Currently not in use.
- **Allow 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.

- **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.

**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.



- **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:

- **Help Desk Contact Name:** Enter the name of a Help Desk Contact.
- **Help Desk Contact Method:** Enter the method to use when contacting the Help Desk.

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



The screenshot shows a settings panel with a header 'UI'. Below the header, there are two text input fields: 'Chrome Identifier:' and 'Custom CSS Directory:'. Between these fields is a checkbox labeled 'Use custom CSS'. The panel has a light gray background and a dark border.

**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.

---

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



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

Partner Dashboard Home 4testcompanytemplate-testtmc Change Tools Change Password Help Sign out

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.

[Event Meeting Settings](#)  
Configure settings for enabling Cvent meeting integration for meeting attendees.

- 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.

Settings Users Services Groups Rules Reports Profiles

[Back to Overview](#)

### Settings | Company Information

Companies

| Name                              | Used in Rule |  |
|-----------------------------------|--------------|--|
| <a href="#">Acme Corp</a>         | Yes          |  |
| <a href="#">Add A New Company</a> |              |  |

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

○ **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
- **Contact Information:**
  - Name: Company main contact name
  - Phone: Company main contact phone number
  - Email: Company main contact email address
- **Additional Information:**
  - Comment 1: Available for special PNR handling

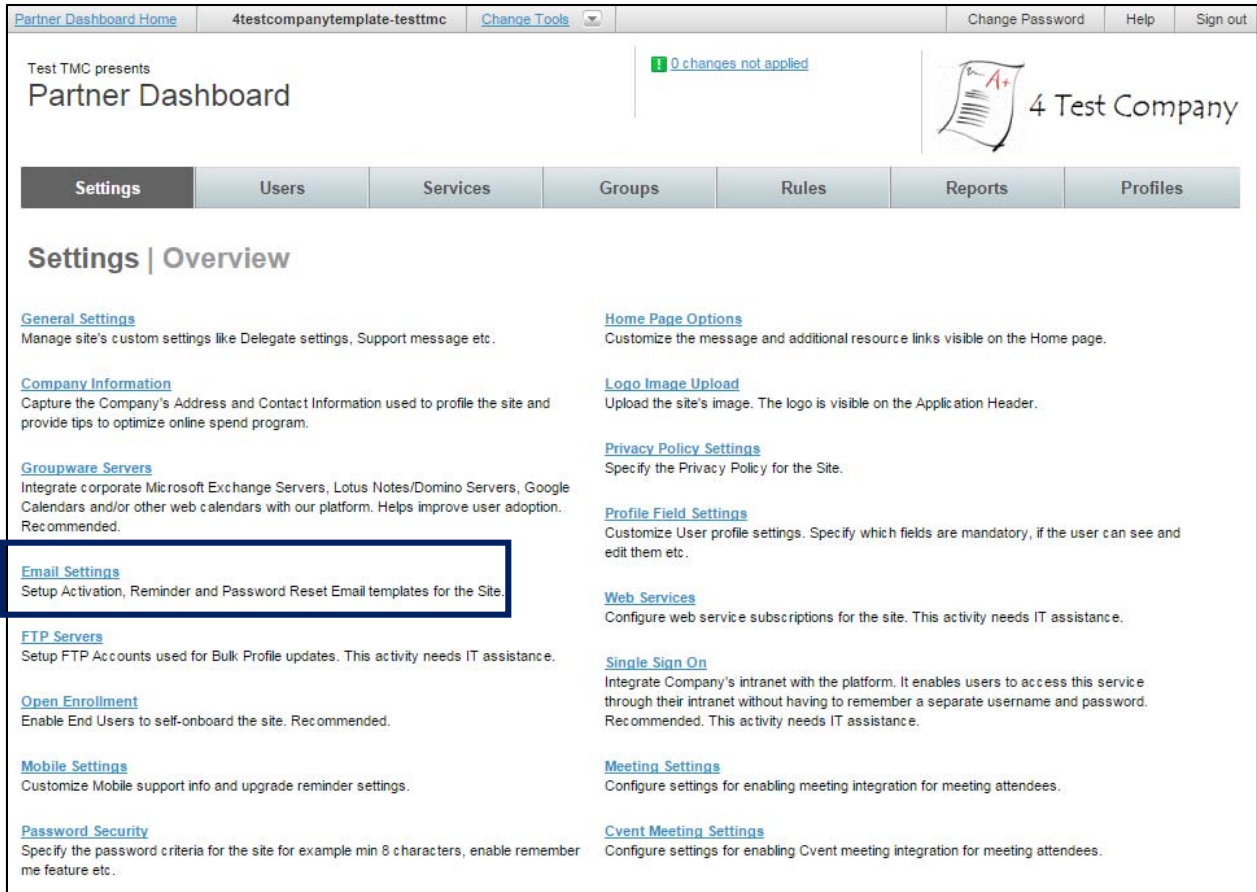
- Comment 2: Available for special PNR handling
  - Comment 3: Available for special PNR handling
6. Click **Save** to save the company information.
  7. Click the **Changes not applied** link to commit changes.

### 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.

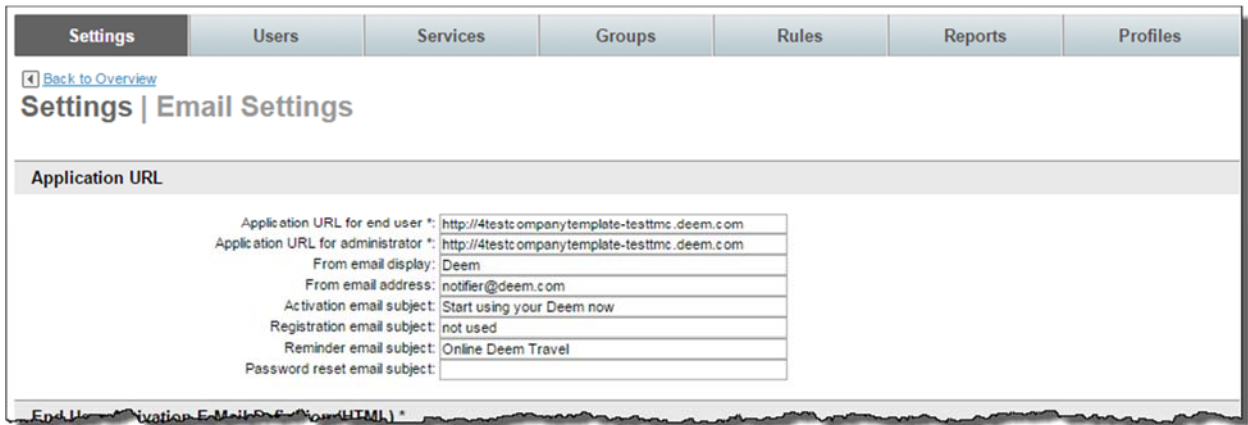
To access the **Email Settings**:

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**

- **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.

The screenshot displays two configuration panels for defining an activation email. The top panel, titled "End User Activation E-Mail Definition (HTML) \*", includes a description and a large text area containing HTML code for a table-based email layout. The bottom panel, titled "End User Activation E-Mail Definition (Text) \*", includes a description and a text area containing a plain text version of the email, including a welcome message and account activation instructions.

**End User Activation E-Mail Definition (HTML) \***

The text below represents the email a user will receive upon activation. This applies to users whose profile information has been uploaded through a user profile load.

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 style="font-family: Arial,Helvetica,sans-serif; font-size: 11px;" bgcolor="#ffffff">
<table border="0" cellpadding="5" cellspacing="0" width="600">
  <tbody><tr>
    <td>
      <table border="0" cellpadding="0" cellspacing="0" width="600">
        <tbody><tr>
```

[Preview Activation E-Mail](#)

**End User Activation E-Mail Definition (Text) \***

The text below represents the email a user will receive upon activation. This applies to users whose profile information has been uploaded through a user profile load.

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

Welcome to Deem

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.

-----

ACTIVATE YOUR ACCOUNT

>>Your site: Registration\_url  
>>Your username: Susername

[Preview Activation E-Mail](#)

- **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).

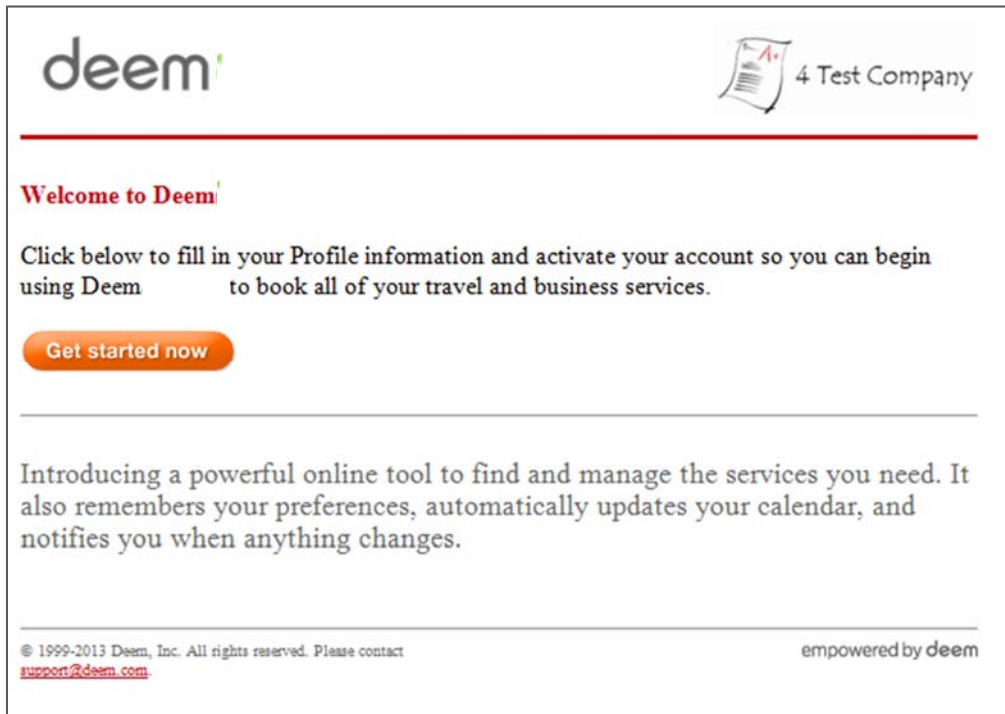
The dialog box prompts the user to enter one or more email addresses to preview the email. It features a text input field containing the email addresses "christine.bland@deem.com,jane.doe@deem.com", a "Send" button, and a "Cancel" button. A note below the input field states "(Separate multiple email addresses with commas or semicolons)".

To preview the email that will be received by the user, enter one or more email address below.

Recipient Email(s):

(Separate multiple email addresses with commas or semicolons)

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



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

- **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.

The screenshot displays a web interface for configuring reminder emails. It is divided into two main sections: HTML and Text.

**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.

- **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  
SBRANDING\_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: Sregistration\_url

Your user name: Susername

[Preview Account Password Reset E-Mail](#)

- **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).
- Click **Send** to send the email. :
- **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.

The screenshot shows two sections for defining administrator activation emails. The top section is titled "Administrator Activation E-Mail Definition (HTML)" and includes a text area with the following content: "Welcome to Deem", "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.", "-----", "ACTIVATE YOUR ACCOUNT", ">>Your site: \$registration\_url", and ">>Your username: \$username". Below the text area is a "Preview Activation E-Mail" link. The bottom section is titled "Administrator Activation E-Mail Definition (Text)" and contains the same text as the HTML section, but without the HTML formatting. It also includes a "Preview Activation E-Mail" link.

- **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.

---

**Administrator Reminder E-Mail Definition (HTML)**

The text below represents the reminder e-mail an administrator 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 style="font-family: Arial,Helvetica,sans-serif; font-size: 11px;" bgcolor="#ffffff">
<table border="0" cellpadding="5" cellspacing="0" width="600">
<tbody><tr>
<td>
<table border="0" cellpadding="0" cellspacing="0" width="600">
```

[Preview Reminder E-Mail](#)

**Administrator Reminder E-Mail Definition (Text)**

The text below represents the e-mail an administrator 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.

[Preview Reminder E-Mail](#)

Save Cancel

- **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 Open Enrollment

The **Open Enrollment** option is typically used by accounts not wanting to set up an ongoing HR feed to allow new user registration from the log in page.

---

**Note:** Open Enrollment is not cloned as enabled when a site has been cloned from a template site. The Administrator must enable open enrollment for each new site, if appropriate.

---

To access the **Open Enrollment**:

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 **Open Enrollment** link.

The screenshot shows the Partner Dashboard interface. At the top, there is a navigation bar with links for 'Partner Dashboard Home', '4testcompanytemplate-testtmc', 'Change Tools', 'Change Password', 'Help', and 'Sign out'. Below the navigation bar, the page title is 'Partner Dashboard' and a notification indicates '0 changes not applied'. A logo for '4 Test Company' is visible in the top right corner. A horizontal menu contains tabs for 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. The main content area is titled 'Settings | Overview' and lists various configuration options:

- 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. (This link is highlighted with a red box in the original image.)
- 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.

The **Settings | Open Enrollment** page is displayed.

- **Open Enrollment**
  - **Enable Open Enrollment:** Select the check box to enable open enrollment.
- **Restriction Criteria**
  - **Restrict by email address** – Selecting this checkbox will restrict self-enrollment to users who enter a business email address which includes email domain names listed in the Allowed domains: text box. Up to 500 characters including commas can be entered in the box.
  - **Restrict by secret key** – Selecting this checkbox will restrict self-enrollment to users who can provide the word or phrase listed in the Secret Key (alpha-numeric) text box when requested. The label to be displayed to the user asking them to enter the secret key is also required when selecting secret key.

---

**Note:** Email domain name and secret key can both be restricted by selecting both checkboxes.

**Process Reminder:** During enrollment, the user is asked to provide their business email address. By selecting the checkbox and entering email domain names on this page, open enrollment access is limited to users whose corporate email domain name is included in the list of email domain names listed on this page.

- **Open Enrollment Success Message:** Enter the text that will be displayed to the user upon successful open enrollment.
- **Open Enrollment Form Headers:** Enter the text that will appear as headers on the open enrollment email in HTML format.
  - General Information Header: This information is pre-populated from the site template.
  - Password Header: This information is pre-populated from the site template.
- **Open Enrollment Email Notifications:**

**Open Enrollment Email Notifications**

Enter comma separated email addresses:

Successful enrollment email notification list :

Failed enrollment email notification list :

---

**Open Enrollment User Activation E-Mail Definition (HTML)**

The text below represents the email a user will receive after open enrollment. This applies to users who have Open enrolled through the Test TMC application itself and are not a part of a user profile load.

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 style="font-family: Arial,Helvetica,sans-serif; font-size: 11px;" bgcolor="#ffffff">
<table border="0" cellpadding="5" cellspacing="0" width="600">
<tbody><tr>
<td>
  <table border="0" cellpadding="0" cellspacing="0" width="600">
  <tbody><tr>
```

[Preview Registration E-Mail](#)

---

**Open Enrollment User Activation E-Mail Definition (Text)**

The text below represents the email a user will receive after open enrollment. This applies to users who have open enrolled through the Test TMC application itself and are not a part of a user profile load.

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

```
Welcome to the DEEM

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.

-----

ACTIVATE YOUR ACCOUNT

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

- Enter the comma separated email addresses to receive notification of a successful enrollment

- Enter the comma separated email addresses to receive notification of a failed enrollment attempt.
- **Open Enrollment User Activation Email Definition (HTML / Text):** The text represents the email a user will receive after open enrollment. This applies to users who have Open Enrolled through the Deem application itself and are not a part of a user profile upload.
- **Preview Registration Email:** Preview the email to be sent by clicking this link.

The screenshot shows a configuration form with two sections: HTML and Text. The HTML section has a large empty text area. The Text section has a text area containing a sample email notification: "An Open Enrollment was attempted. Site: \$registration\_url Username: \$username". At the bottom right, there are "Save" and "Cancel" buttons.

- **Success / Failure Open Enrollment Admin Email Notifications (HTML / Text):** Enter the HTML or plain text that represents the email an administrator will receive after success or failure of an open enrollment.

---

**Note:** If assistance is needed when populating this area, open an issue in the Customer Portal and choose Configuration Request from the drop down list.

---

4. Click **Save** to save the company information.
5. Click the **Changes not applied** link to commit changes.

### 3.2.5 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 screenshot shows the 'Settings | Overview' page of the Deem Travel Partner Dashboard. The page has a navigation bar with tabs for Settings, Users, Services, Groups, Rules, Reports, and Profiles. The 'Settings' tab is active. Below the navigation bar, there are several sections of settings, each with a link and a brief description. The 'Mobile Settings' link is highlighted with a red box. The 'Mobile Settings' link is located in the left column, under the 'Mobile Settings' section. The 'Mobile Settings' link is located in the left column, under the 'Mobile Settings' section. The 'Mobile Settings' link is located in the left column, under the 'Mobile Settings' section.

|   |   |
|---|---|
| <a href="#">General Settings</a><br>Manage site's custom settings like Delegate settings, Support message etc.  | <a href="#">Home Page Options</a><br>Customize the message and additional resource links visible on the Home page.  |
| <a href="#">Company Information</a><br>Capture the Company's Address and Contact Information used to profile the site and provide tips to optimize online spend program.  | <a href="#">Logo Image Upload</a><br>Upload the site's image. The logo is visible on the Application Header.  |
| <a href="#">Groupware Servers</a><br>Integrate corporate Microsoft Exchange Servers, Lotus Notes/Domino Servers, Google Calendars and/or other web calendars with our platform. Helps improve user adoption. Recommended. | <a href="#">Privacy Policy Settings</a><br>Specify the Privacy Policy for the Site.   |
| <a href="#">Email Settings</a><br>Setup Activation, Reminder and Password Reset Email templates for the Site.   | <a href="#">Profile Field Settings</a><br>Customize User profile settings. Specify which fields are mandatory, if the user can see and edit them etc.   |
| <a href="#">FTP Servers</a><br>Setup FTP Accounts used for Bulk Profile updates. This activity needs IT assistance.   | <a href="#">Web Services</a><br>Configure web service subscriptions for the site. This activity needs IT assistance.  |
| <a href="#">Open Enrollment</a><br>Enable End Users to self-onboard the site. Recommended.  | <a href="#">Single Sign On</a><br>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. |
| <a href="#">Mobile Settings</a><br>Customize Mobile support info and upgrade reminder settings.   | <a href="#">Meeting Settings</a><br>Configure settings for enabling meeting integration for meeting attendees.  |
| <a href="#">Password Security</a><br>Specify the password criteria for the site for example min 8 characters, enable remember me feature etc.   | <a href="#">Event Meeting Settings</a><br>Configure settings for enabling Cvent meeting integration for meeting attendees.  |

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

- **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.
- **Reauthorization Interval:** Length of time that passes between logins before reauthorization is required.
- **Helpdesk Email:** Optional Helpdesk email address that can display on the user’s mobile phone. This information generally pre-populates from the super domain.
- **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.
- **Helpdesk 1 Phone** through **Helpdesk 4 Phone:** Optional Helpdesk phone numbers that can display on the user’s mobile device.
- **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.
- **Calendar Synchron:** Select **Use Super Domain Setting**, **Enabled**, or **Disabled** from the drop down list to allow synchronization of the mobile device to your calendar.
- **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.
- **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.



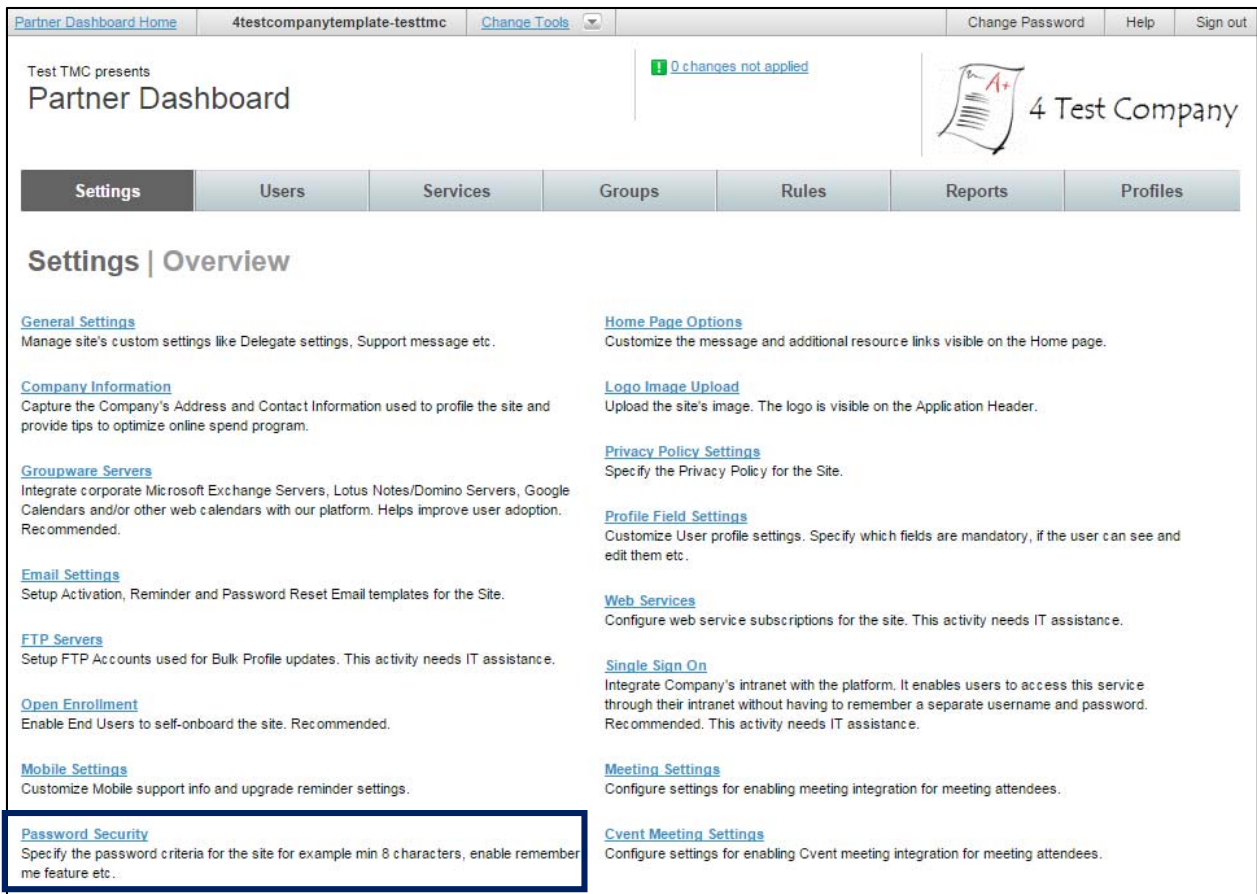
- **Mobile Download Link:** Select **Use Super Domain Setting, Turn on Mobile Download Page**, or **Turn off Mobile Download Page** from the drop down list
4. Click **Save** to save the Mobile Settings page.
  5. Click the **Changes not applied** link to commit changes.

### 3.2.6 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.

- **Minimum password length:** Enter the minimum length a password must be. It is recommended the password be at least 6 characters in length.
- **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.
- **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.
- **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.
- **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.
- **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 passwOrd is permitted. It is recommended this option be used for added security.
- **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.
- **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.
- **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.

### **3.2.7 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.

Partner Dashboard Home 4testcompanytemplate-testtmc Change Tools Change Password Help Sign out

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.

The **Homepage Options** page is displayed.

**Settings | Homepage Options**

**Custom Services Message**

Enter HTML or plain text to be displayed on the services home page:

```
<B>Welcome to Deem!</B><P>ACME has partnered with Deem to bring you the one-stop-shop for all of your travel, web and audio conferences, package shipments, and dining reservations.
</P><BR /><P>Deem offers many time-saving features for you as well, including:<BR /><OL><LI>Automatic calendar updates</LI><LI>Email, voice, and text messaging</LI><LI>Flight status
updates</LI></OL>
```

**Additional Resource Links**

| Link Name                 | URL                              |                        |
|---------------------------|----------------------------------|------------------------|
| Travel Advisories         | http://travel.state.gov          | <a href="#">Remove</a> |
| Passport Services         | http://travel.state.gov/passport | <a href="#">Remove</a> |
| Weather                   | http://www.weather.com           | <a href="#">Remove</a> |
| Maps & Directions         | http://www.mapquest.com          | <a href="#">Remove</a> |
| Currency Converter        | http://www.xe.net/ucc            | <a href="#">Remove</a> |
| Red Carpet Club Locations | http://www.united.com/rcc        | <a href="#">Remove</a> |
| Admirals Club Locations   | http://www.aa.com/admiralsclub   | <a href="#">Remove</a> |
| google                    | http://www.google.com            | <a href="#">Remove</a> |

[Add A New Link](#)

**Save** **Cancel**

- **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.

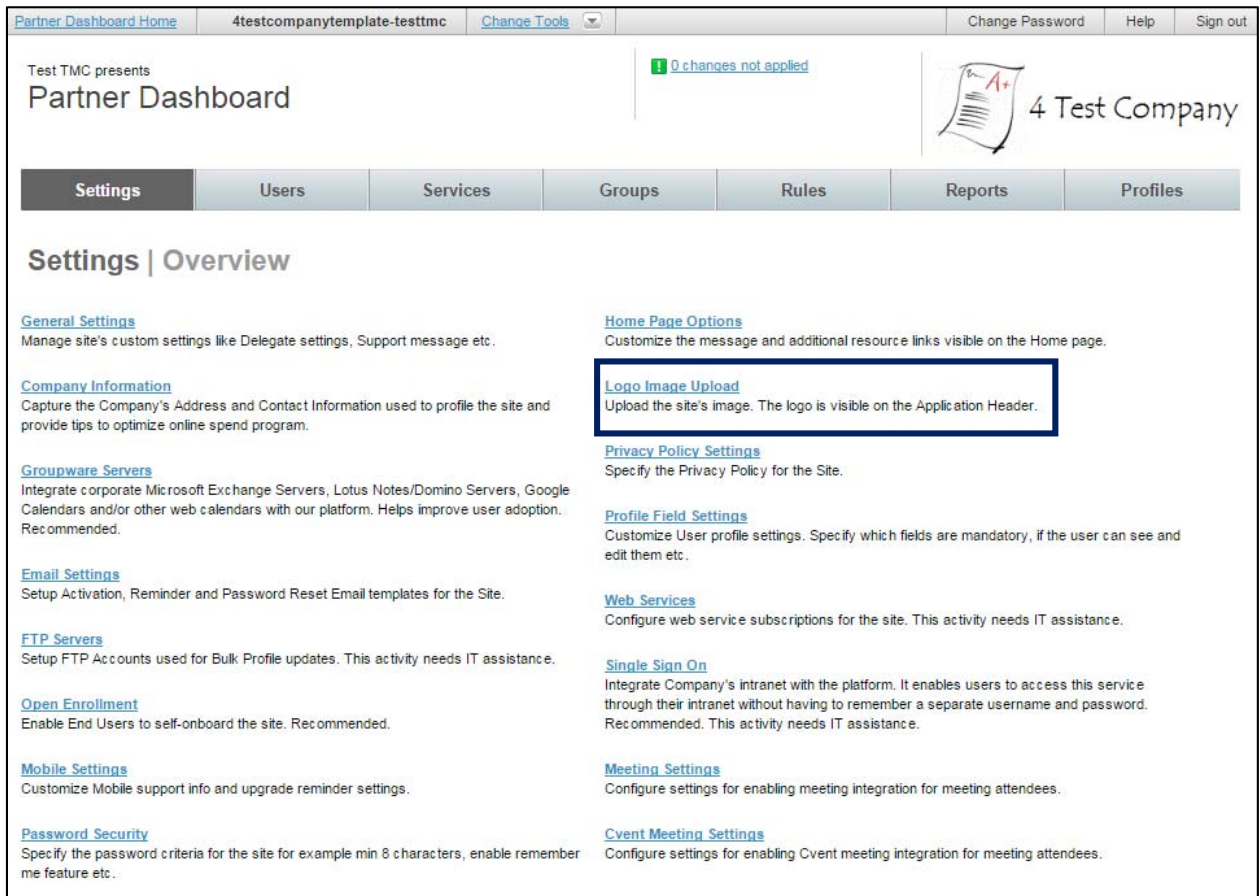
- **Additional Resource Links:** At site creation, default links are provided to allow pages outside of the Deem application to be accessed while remaining signed into the application. Links can be removed, additional links can be added and the URL’s can be changed. Intranet links can also be used.
4. Click **Save** to save the Home Page Options settings.
  5. Click the **Changes not applied** link to commit changes.

### 3.2.8 Logo Image Upload

The **Logo Image Upload** link allows the site administrator to further customize the site by loading the company or agency logo into the upper right corner of Deem pages and on the login page. The logo will also appear within all activation emails sent from this site.

To access the **Logo Image Upload**:

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 **Logo Image Upload** link.



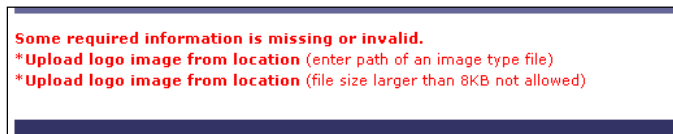
4. The **Settings | Logo Image Upload** page is displayed. Select the file to upload by clicking the **Browse** button and locating the logo on your hard drive.



**Note:** The image MUST be in GIF, PNG & JPG format and be not larger than 60 pixels high and 420 pixels wide. It is recommended the background be transparent for best results.

5. Once the file has been located and selected, click the **Update Logo Preview** button.

**Note:** If the image does not meet the above requirements, an error message similar to the one below will be displayed:



6. If the logo image meets the requirements, the logo is displayed as it will appear on Deem pages and in activation emails.



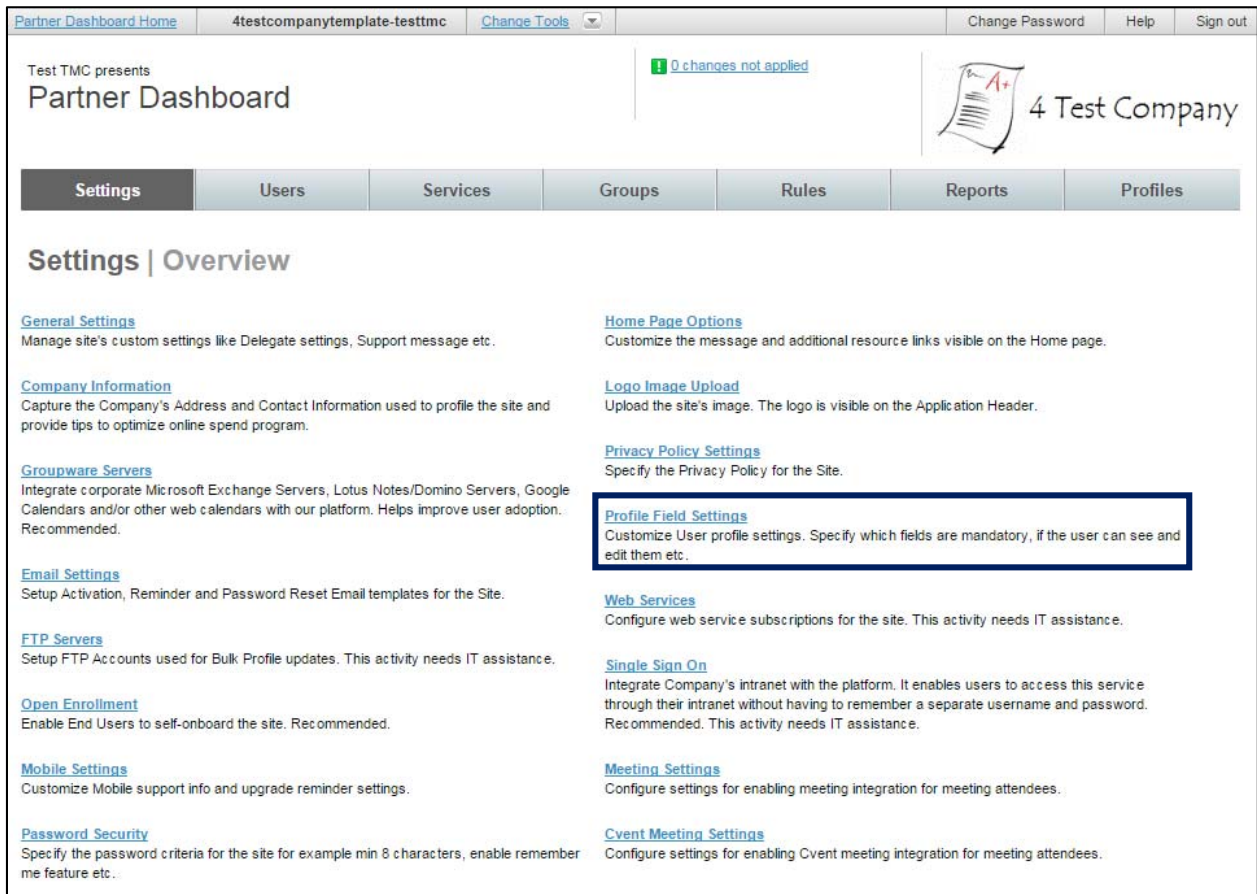
7. Click **Save** to save the logo image.
8. Click the **Changes not applied** link to commit changes.

### 3.2.9 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.



### 3.2.9.1 Standard Profile Fields

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



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

The screenshot shows the 'Settings | Configure' page with a table of profile fields. The table has eight columns: Field Name, Display Label, Data Source, Display in Settings, Display in Registration, Required Field for User, Display in Settings For Guests, and Required Field for Guest Users. Three rows are visible: External ID, User Name, and Title.

| Field Name  | Display Label | Data Source  | Display in Settings                 | Display in Registration  | Required Field for User  | Display in Settings For Guests | Required Field for Guest Users |
|-------------|---------------|--|-------------------------------------|--------------------------|--------------------------|--------------------------------|--------------------------------|
| External ID | Employee ID   | <input checked="" type="checkbox"/> Profile Load<br><input checked="" type="radio"/> All Users<br><input type="radio"/> New Users Only<br><input type="checkbox"/> User Editable<br><input checked="" type="checkbox"/> Agent Editable<br><input checked="" type="checkbox"/> Admin Editable |                                     |                          |                          |                                |                                |
| User Name   | Username      | <input checked="" type="checkbox"/> Profile Load<br><input checked="" type="radio"/> All Users<br><input type="radio"/> New Users Only<br><input type="checkbox"/> User Editable<br><input checked="" type="checkbox"/> Agent Editable<br><input checked="" type="checkbox"/> Admin Editable | <input checked="" type="checkbox"/> | <input type="checkbox"/> |                          | <input type="checkbox"/>       |                                |
| Title       | Title         | <input checked="" type="checkbox"/> Profile Load<br><input checked="" type="radio"/> All Users<br><input type="radio"/> New Users Only<br><input type="checkbox"/> User Editable<br><input checked="" type="checkbox"/> Agent Editable<br><input checked="" type="checkbox"/> Admin Editable | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>       | <input type="checkbox"/>       |

- 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.

## DEEM TRAVEL – PARTNER DASHBOARD TRAINING: MODULE 1

- 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 |
|---------|---------------|

## DEEM TRAVEL – PARTNER DASHBOARD TRAINING: MODULE 1

- Mailstop
- **Home Address:**
  - Country Address Block
  - Mailstop
- **Passports:**
  - Passports
- **Visas:**
  - Visas
- **Emergency Contact:**
  - Name Relationship
  - Primary Phone Number Secondary Phone Number
  - Email Country
  - Address Block Emergency Mailstop
- **Payment Cards:**
  - Personal Cards Corporate Cards
- **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
- **Travel Account (for Non-Deem Travel):** Currently not in use.
- **National Identification Info:**
  - National ID Information
- **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.

### 3.2.9.2 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 |
|--|-----------------|------------|-----------------|-----------------------|---------|----------|
| <a href="#">Back to User Profile Fields</a><br><b>Settings   Customize</b> |                 |            |                 |                       |         |          |
| Customizable Profile Fields  |                 |            |                 |                       |         |          |
| Field Name   | Display Label   | Field Type | Last Update     | Action                |         |          |
| <a href="#">Business Unit</a>  | BUN             | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Company Name</a>   | Company Name    | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Cost Center</a>  | Cost Center     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Department Code</a>  | Department Code | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Department Name</a>  | Department Name | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Division</a>   | Division        | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Employee Type</a>  | Employee Type   | List       | January 2, 2009 | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 1</a>  | Zone            | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 2</a>  | MIS Field 2     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 3</a>  | MIS Field 3     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 4</a>  | MIS Field 4     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 5</a>  | MIS Field 5     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 6</a>  | MIS Field 6     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">MIS Field 7</a>  | MIS Field 7     | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Job Level</a>  | Job Level       | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Suffix</a>   |                 | --         | --              | <a href="#">Clear</a> |         |          |
| <a href="#">Done</a>   |                 |            |                 |                       |         |          |

- 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.

○ **Customize Field: Field Information:**

- **Name:** 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.
- **Label:** 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.

- **Field Type:** Specify if the field is to be Text (The field is displayed as free form text) or List (The field will have a drop down list)
  - **Display in Settings:** 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.
  - **Display in Registration:** 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.
  - **Required Field:** 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.
- **Field Type Preference: TEXT:** When the Field Type is set to Text, the following options are displayed:
  - **Min. Length:** If the field is specified as required, the value of 1 or greater must be entered as the minimum length.
  - **Max. Length:** 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.
- **Field Type Preference: LIST:** When the Field Type is set to List, the following options are displayed:

The screenshot shows a configuration window for a 'List' field type. At the top, 'Field Type' is set to 'List'. Below this, there are three checkboxes: 'Display in Settings' (checked), 'Display in Registration' (unchecked), and 'Required Field' (unchecked). A blue arrow points to the 'Display in Settings' checkbox. The main section is titled 'Field Type Preference: LIST'. It contains a text area for 'Option Labels and Values'. Below the text area is a checkbox for 'Sort labels alphabetically'. Underneath that is a 'Default:' section with three radio button options: 'Select first value as default', 'Select value prefixed with "\*" as default', and 'Select no value as default' (which is selected). At the bottom right of the window are 'Save' and 'Cancel' buttons.

- 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.

## 4 Roles and Responsibilities - Deem

There are certain configuration tasks that are the exclusive responsibility of the Deem Configuration Team.

These tasks include:

- Initial Profile Map upload (GDS Profile sent to ETSI by Deem)
- Mass updates to existing users - Initial uploads can be performed by the Site Administrator
- Custom PNR script creation and maintenance
- Single Sign On Configuration
- Web Services Configuration
- Full calendar / contact integration configuration

Additional information about each of these topics is available in a Deem Advanced Class.