



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

Deem Travel Partner Dashboard Training - Module Four – Rules and Groups On-Demand Reporting Version 17, October 19, 2015 Series

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1 Module Series Overview

Welcome to Deem's 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 Rules and Groups

A user's access to services and other options is determined by the groups to which the user belongs. If a user belongs to more than one group, the group with the lowest priority number (the one appearing closest to the top of the list) is selected to govern the access and options available to the user. By default, if a user is not included in another group with a higher priority or if no other groups are added to rules, the user will follow the rules established for the **Everyone Group**.

Groups are prioritized to decide which rule will be applied if a user is a member of more than one group. The **Priority** column is found to the left of each **Group** whose rules are defined on the Rules tab. The lower the priority number (located at the top of the list), the higher the rule priority this group will have. The rule with the lowest priority will be applied to members of the group.

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

2.1 Rules Tab

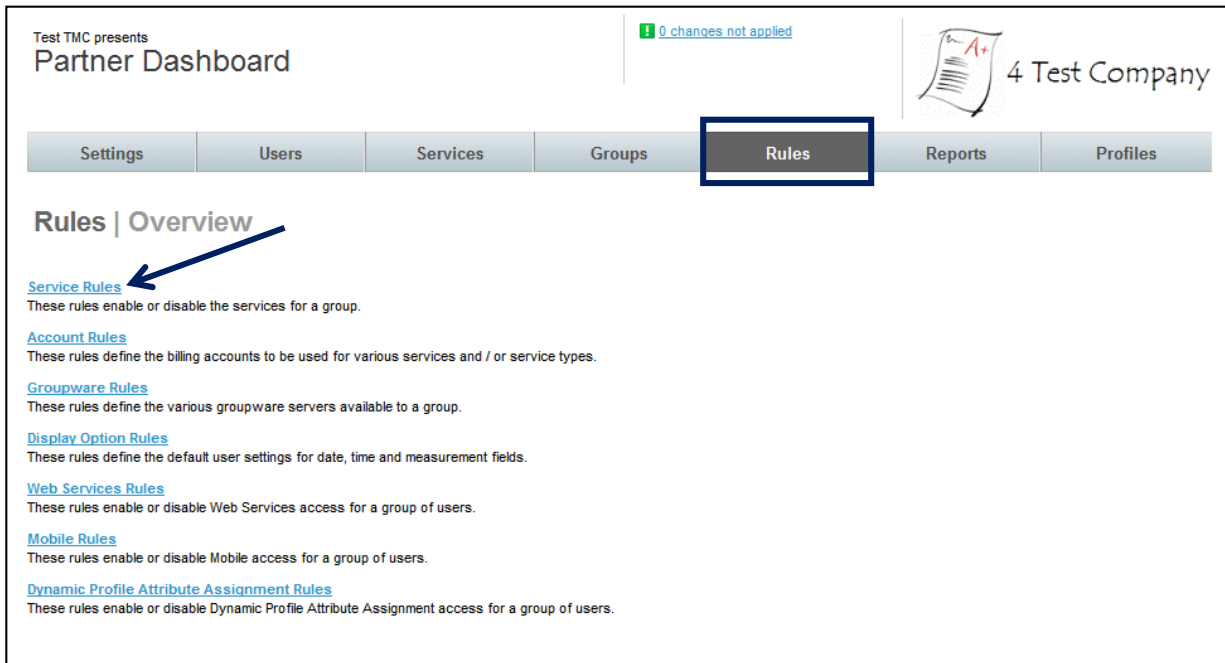
The Deem Dashboard Service Rules Tab is where to establish the rules engaged when a user is viewing and booking Travel (Air, Car and Hotel) and other services such as Conferencing, Shipping, and Dining.

In an earlier Basic Dashboard Training module Configuration and Policy settings for Services were discussed. Here, enforcement of different rules for different user groups will be learned. The point to keep in mind is that a user can belong to more than one group. The lower the priority number of the rule (closest to the top of the list) governs what rule to apply to the user.

To configure **Service Rules**:

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** tab page is displayed. Click the **Rules** tab to access the different types of rules available on the dashboard.

4. The **Rules** tab page is displayed.



Service Rules: These rules enable or disable the services for a group.

Account Rules: These rules define the billing accounts to be used for various services and / or service types.

Groupware Rules: These rules define the various groupware servers available to a group.

Display Option Rules: These rules define the default user settings for date, time and measurement fields.

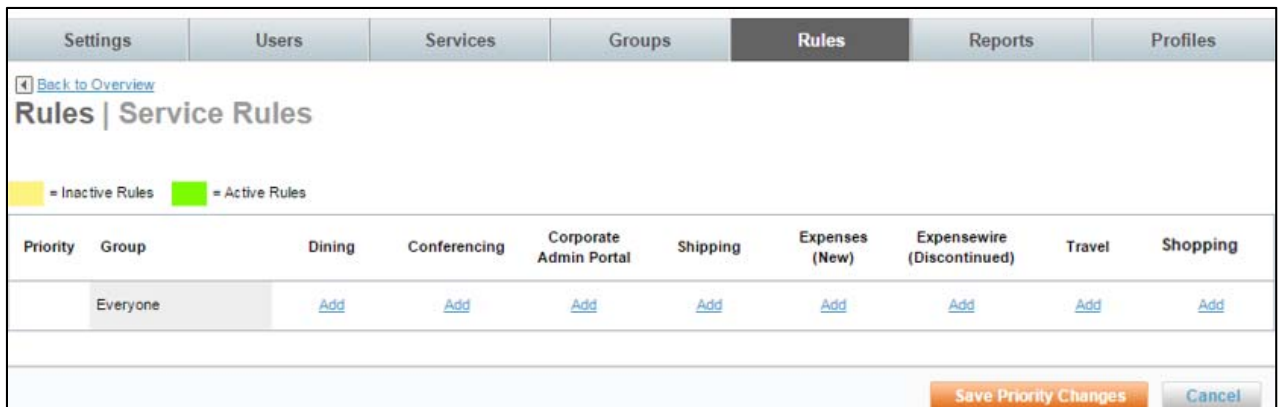
Web Services Rules: These rules enable or disable Web Services access for a group of users.

Mobile Rules: These rules enable or disable Mobile access for a group of users.

Dynamic Profile Attribute Assignment Rules: These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

5. Click the **Service Rules** link to enable service rules. The **Rules | Services Rules** page is displayed. Several different service rules can be configured on the page:

Note: Only contracted services will appear on the page. If interested in additional services, please contact your Account Management team member.



Dining - Used to establish rules for groups enabling Dining

Conferencing - Used to establish rules for groups enabling Conferencing

Corporate Admin Portal – Used by the domain or corporate administrator to enable other contracted stores

Shipping – Used to establish rules for groups enabling our Package Shipping store

Expenses – Used to establish rules for groups enabling Expense

Travel - Used to establish rules for groups enabling Air, Hotel, Car, Airport Parking, and Car Service

Shopping – Used to establish rules for groups enabling Shopping.

Note: The order in which these columns appear may differ by site.

There are 3 possible values for each group within the **Service Rules** columns:

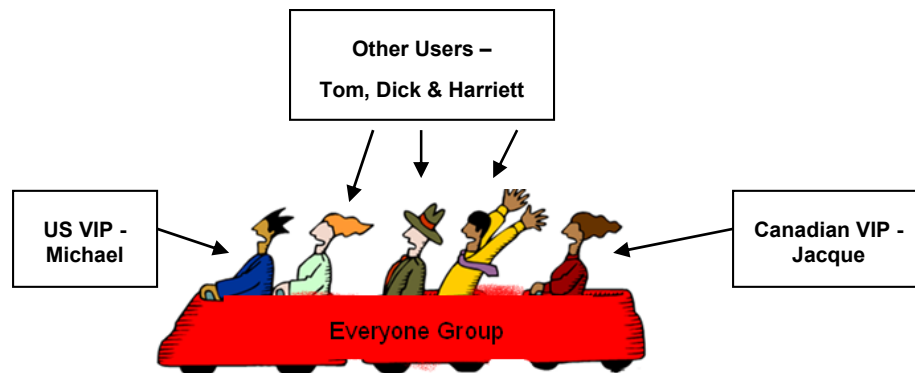
- **Add** link indicates there are currently no rules established for the group for the specific service
- **Edit** link with GREEN coloration indicates there are rules established for the group for the specific service and they are active
- **Edit** link with YELLOW coloration indicates there are rules established for the group for the specific service but they are inactive

2.1.1 Travel Rules for the Everyone Group

To enable Travel Rules, first determine if all users will use the same rules or if there are different rules for different groups of travelers or users. If everyone will follow the same rules, only add Travel Service Rules to the Everyone Group.

Think of the Everyone Group as a car with all users inside. Here we see a US VIP named Michael, a Canadian VIP named Jacque, and the other users named Tom, Dick and Harriett. For right now, they are all only in the Everyone Group. With only the Everyone Group defined, all users would follow the same rules – all or none would be allowed Conferencing or Dining, for example. All would be found to be out of policy if they selected First Class for International flights or all Pseudo-Cities and queue delivery options would be the same for all users unless we add additional groups and set parameters for their user definition.

Important to Remember: - Users can belong to more than one group. Priorities govern which rule will be enforced.



If different users will follow different travel rules, VIP's for example, add other groups to define each unique set of users and then add Travel Service Rules to the appropriate group. We will discuss adding additional groups and establishing their rules later in this guide.

Let's first set up travel rules for the **Everyone Group** to see how it is done:

1. Click the **Add** or **Edit** link found in the **Travel** column for the Everyone Group. As noted above, the link found beside the Everyone Group may be either Add or Edit depending on if rules have previously been set up for the group.
2. The **Rules |Travel Rule** page is displayed. Enter a Rule **Description** that describes the intent of this rule and will be easily recognizable when it appears in a drop down list. Be sure to click the **Activate Rule** checkbox.

Settings Users Services Groups **Rules** Reports Profiles

[Back to Service Rules](#)

Rules | Travel Rule

Rule Definition

Description: Activate Rule

IF...

Group: Everyone

3. Scroll down to the **THEN** section of the page. (Travel Mode through Travel Policy displayed here)

4. Click the **Enable Travel service with the following options and selected providers** checkbox and select the **Enable Rearden Travel** radio button.

5. Continue down the page:

- **Travel Mode:**
 - Select **Full service** from the drop down list if the rule is to include the travel store
 - Select **Read only** from the drop down list if the rule is for PNR Synchronization or the Mobile Store only with no travel
- **Enable Train**
 - Select **Enable Train** checkbox to enable train for this rule / Group.
- **Vendor Preferences:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Vendor Preferences discussion.

- **Airline Preference Set:** Select the Airline Preference Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Airline Sets** link to go to the configuration page.

- The **Rules | Airline Preference Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Airline Preference Sets</h2>						
Airline Preference Sets						
Preference Set Name		Used In Rule				
Sacramento		No				
AI AIR SET		No				
AFD Property Mgt		Yes				
Add A New Airline Preference Set						

- Select the **Preference Set Name** link to review the set or click **Add A New Airline Preference Set** to add a new set.
- o **Rental Car Preference Set:** Select the Car Rental Preference Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Car Rental Sets** link to go to the configuration page.
- The **Rules | Car Rental Preference Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Car Rental Preference Sets</h2>						
Car Rental Preference Sets						
Preference Set Name		Used In Association				
AI CAR SET		No				
CARE'S SET		Yes				
Add A New Car Rental Preference Set						

- Select the **Car Rental Preference Set Name** link to review the set or click **Add A New Car Rental Preference Set** to add a new set.

- **Hotel Chain Preference Set:** Select the Hotel Chain Preference Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Sets** link to go to the configuration page.
 - The **Rules | Hotel Chain Preference Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles																		
Back to Travel Rule																								
<h3>Rules Hotel Chain Preference Sets</h3>																								
<table border="1"> <thead> <tr> <th colspan="3">Hotel Chain Preference Sets</th> </tr> <tr> <th>Preference Set Name</th> <th>Used In Association</th> <th></th> </tr> </thead> <tbody> <tr> <td>hk</td> <td>Yes</td> <td></td> </tr> <tr> <td>Sacramento</td> <td>No</td> <td></td> </tr> <tr> <td>IHC Hotel</td> <td>No</td> <td></td> </tr> <tr> <td colspan="3"> Add A New Hotel Chain Preference Set </td> </tr> </tbody> </table>							Hotel Chain Preference Sets			Preference Set Name	Used In Association		hk	Yes		Sacramento	No		IHC Hotel	No		Add A New Hotel Chain Preference Set		
Hotel Chain Preference Sets																								
Preference Set Name	Used In Association																							
hk	Yes																							
Sacramento	No																							
IHC Hotel	No																							
Add A New Hotel Chain Preference Set																								

- Select the **Hotel Preference Set Name** link to review the set or click **Add A New Hotel Chain Preference Set** to add a new set.
- **Restricted Countries Set:** Select the Restricted Countries Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Restricted Countries Sets** link to go to the configuration page.
 - The **Rules | Restricted Countries Configuration Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles												
Back to Travel Rule																		
<h3>Rules Restricted Countries Configuration Sets</h3>																		
<table border="1"> <thead> <tr> <th colspan="3">Restricted Countries Configuration Sets</th> </tr> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;"> You do not have any Restricted Countries Configuration Sets defined </td> </tr> <tr> <td colspan="3"> Add Restricted Countries Configuration Set </td> </tr> </tbody> </table>							Restricted Countries Configuration Sets			Set Name	Used In Rule	Last Update	You do not have any Restricted Countries Configuration Sets defined			Add Restricted Countries Configuration Set		
Restricted Countries Configuration Sets																		
Set Name	Used In Rule	Last Update																
You do not have any Restricted Countries Configuration Sets defined																		
Add Restricted Countries Configuration Set																		

- Select the **Restricted Countries Configuration Sets Name** link to review the set or click **Add Restricted Countries Configuration Set** to add a new set.
- **Travel Policies:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Travel Policies discussion.

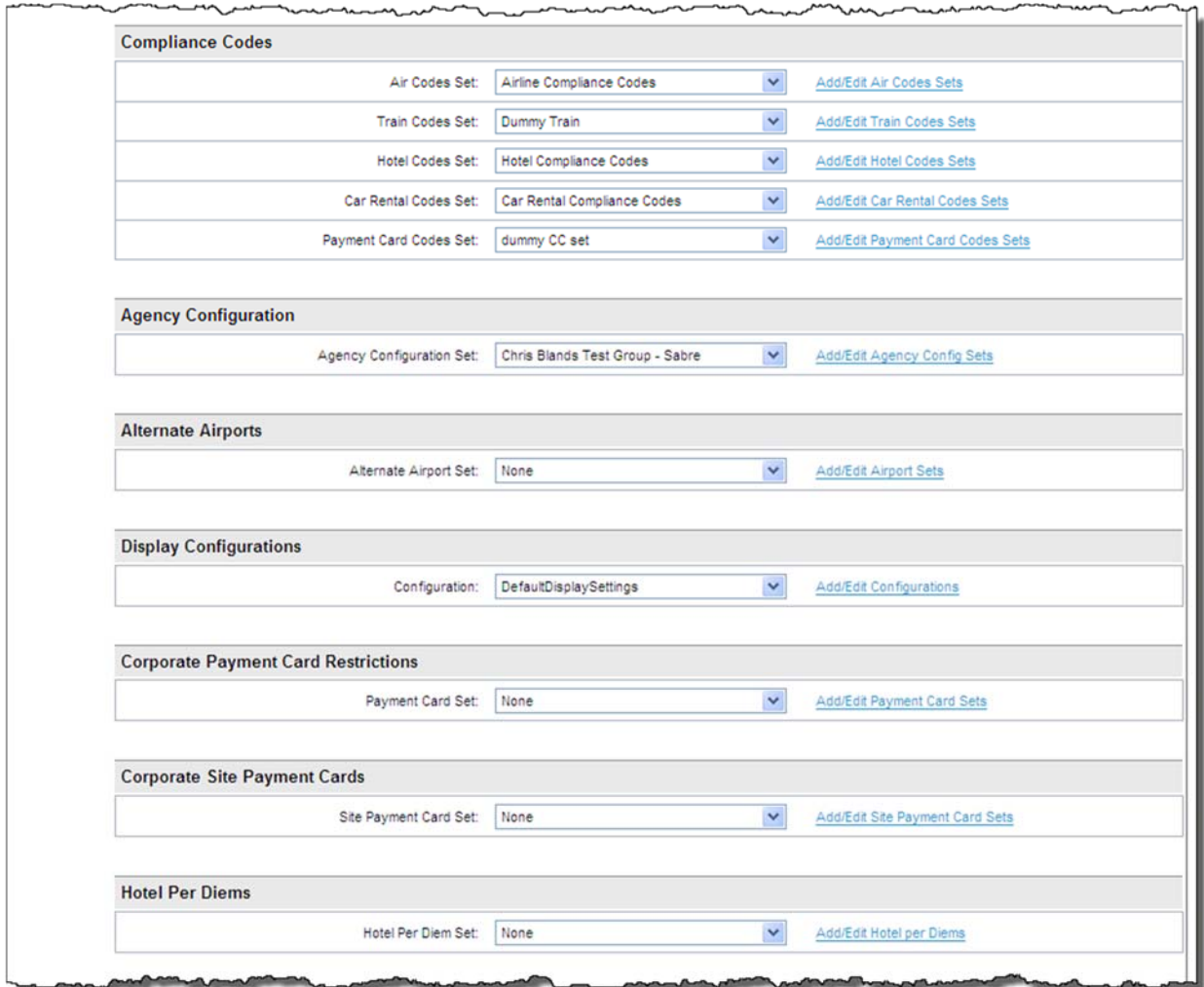
- **Policy Set:** Select the Policy Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Policy Sets** link to go to the configuration page.
 - The **Rules | Policy Sets** page is displayed.

Set Name	Used In Rule	Last Update	
Guest Travel	No	August 16, 2007	
Everyone	No	August 16, 2007	
Sacramento	No	August 21, 2007	

[Add A New Travel Policy Set](#)

- Select the **Policy Set Name** link to review the set or click **Add A New Travel Policy Set** to add a new set.

- 6. Scroll down further in the **THEN** section of the page. (Compliance Codes through Hotel Per Diems displayed)



- **Compliance Codes:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Compliance Code discussion.

Note: Please note that all compliance codes are displayed when any of the links are selected in this section. Be sure to select the appropriate code for the element being worked.

- **Air Codes Set:** Select the Air Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Air Codes Sets** link to go to the configuration page where compliance codes can be added as needed.

- The **Rules | Compliance Codes Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Compliance Codes Sets</h2>						
<h3>Compliance Codes Sets</h3>						
Set Name	Type	Used In Rule	Last Update			
Air Compliance Codes	Airline	Yes	October 25, 2010	✘		
Airline Compliance Codes	Airline	Yes	September 22, 2010	✘		
Car Rental Compliance Codes	Car Rental	Yes	April 21, 2008	✘		
Charge Card Compliance Codes	Payment Card	Yes	April 21, 2008	✘		
Dummy Train	Train	Yes	June 22, 2009	✘		
Hotel Compliance Codes	Hotel	Yes	April 21, 2008	✘		
dummy CC set	Payment Card	Yes	October 26, 2008	✘		
Add A New Compliance Code Set						

- Select the **Set Name** link to review the set or click **Add A New Compliance Code Set** to add a new set.
 - **Train Codes Set:** Select the Train Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)
 - **Hotel Codes Set:** Select the Hotel Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)
 - **Car Rental Codes Set:** Select the Car Rental Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Car Rental Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)
 - **Payment Card Codes Set:** Select the Payment Card Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Payment Card Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)
- **Agency Configuration:**

Note: Please refer to *Module 2: Travel (Part One)* for an Agency Configuration discussion.

- **Agency Configuration Set:** Select the Agency Configuration Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Agency Configuration Sets** link to go to the configuration page.

- The **Rules | Agency Settings** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule Rules Agency Settings						
Agency Settings						
Setting Name ▾	GDS	PCC	Location	Used In Rule		
Agency Configuration	Sabre	1234	SFO	No		
Add A New Agency Setting						

- Select the **Setting Name** link to review the set or click **Add A New Agency Setting** to add a new set.

- **Alternate Airports:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Alternate Airport discussion.

- **Alternate Airport Set:** Select the Alternate Airport Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Airport Sets** link to go to the configuration page.
- The **Rules | Alternate Airport Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule Rules Alternate Airport Sets						
Alternate Airport Sets						
Set Name ▾	Used In Rule	Last Update				
Charlotte Based	Yes	May 15, 2009				
Sacramento	Yes	March 03, 2008				
TPA:BOS	No	March 03, 2008				
VA	Yes	March 03, 2008				
Add A New Alternate Airport Code Set						

- Select the **Set Name** link to review the set or click **Add A New Alternate Airport Code Set** to add a new set.

- **Display Configuration:**

Note: Please refer to *Module 2: Travel (Part One)* for Display Configuration discussion.

- **Configuration:** Select the Configuration previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Configurations** link to go to the configuration page.

- The **Rules | Display Configuration Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Display Configuration Sets</h2>						
Display Configuration Sets						
Set Name	Used In Rule	Last Update				
Guest Travel	No	August 22, 2007				
Everyone	No	August 21, 2007				
Add A New Display Configuration Set						

- Select the **Set Name** link to review the set or click **Add A New Display Configuration Set** to add a new set.

- **Corporate Payment Card Restrictions:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Corporate Payment Card discussion.

- **Payment Card Set:** Select the Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Payment Card Sets** link to go to the configuration page.
- The **Rules | Corporate Payment Card Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Corporate Payment Card Sets</h2>						
Corporate Payment Card Sets						
Set Name	Used In Rule	Last Update				
XYZ hotel GTD	No	August 21, 2007				
Add a new payment card set						

- Select the **Set Name** link to review the set or click **Add A New Payment Card Set** to add a new set.

- **Corporate Site Payment Cards:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Corporate Site Payment Card discussion.

- **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Site Payment Card Sets** link to go to the configuration page.

- The **Rules | Site Payment Cards Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Site Payment Cards Sets</h2>						
<h3>Site Payment Cards Sets</h3>						
Set Name ▾		Used In Rule	Last Update			
Corp American Express Card		No	October 25, 2010			
Add a new site payment card set						

- Select the **Set Name** link to review the set or click **Add a New Site Payment Card Set** to add a new set.

- **Hotel Per Diems:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Hotel Per Diem discussion.

- **Hotel Per Diem Set:** Select the Hotel Per Diem Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Per Diems** link to go to the configuration page.

- The **Rules | Hotel Per Diem Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Hotel Per Diem Sets</h2>						
<h3>Hotel Per Diem Sets</h3>						
Set Name ▾		Used In Rule	Last Update			
MCO		No	May 15, 2009			
Add A New Hotel Per Diem Set						

- Select the **Set Name** link to review the set or click **Add Hotel Per Diem Set** to add a new set.

7. Scroll down further in the **THEN** section of the page. (Reference Points through the bottom of the page is displayed)

Reference Points

Reference Points Set: Reference Points 14Apr08 [Add/Edit Reference Points Sets](#)

Private Negotiated Rate Sets

Airline Rate Set: Airline Rate Set [Add/Edit Airline Rate Sets](#)

Train Private Rate Set: Train Set [Add/Edit Train Rate Sets](#)

Rental Car/Hotel Discount Code Set: Car and Hotel Rates [Add/Edit Rental Car/Hotel Discount Code Sets](#)

Hotel Private Rate Set: None [Add/Edit Hotel Private Rate Sets](#)

Company Information

Company: Acme Corp [Add/Edit Company Info](#)

Custom Fields

Custom Field Set: DefaultCustomSet [Add/Edit Custom Fields Set](#)

Enable Airport Parking with the following options:

Configuration:	ABC CO.everyone	Manage Configurations
Site Payment Card Set:	None	Manage Site Payment Card Sets
Policies:	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	Add Policies to List Remove Selected Policies from List Manage All Policies

Enable Car Service with the following options:

Configuration:	Deem Network	Manage Configurations
Reference Points Set:	None	Manage Reference Points Sets
Payment Card Set:	None	Manage Payment Card Sets
Site Payment Card Set:	None	Manage Site Payment Card Sets
Policies:	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	Add Policies to List Remove Selected Policies from List Manage All Policies

Save
Cancel

- **Reference Points:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Reference Point discussion.

- **Reference Points Set:** Select the Reference Points Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Reference Points Sets** link to go to the configuration page.

- The **Rules | Reference Point Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles									
Back to Travel Rule															
<h2>Rules Reference Point Sets</h2>															
<table border="1"> <thead> <tr> <th>Reference Point Sets</th> <th>Set Name</th> <th>Used In Rule</th> </tr> </thead> <tbody> <tr> <td></td> <td>Reference Points</td> <td>Yes </td> </tr> <tr> <td colspan="3"> Add A New Reference Point Set </td> </tr> </tbody> </table>							Reference Point Sets	Set Name	Used In Rule		Reference Points	Yes 	Add A New Reference Point Set		
Reference Point Sets	Set Name	Used In Rule													
	Reference Points	Yes 													
Add A New Reference Point Set															

- Select the **Set Name** link to review the set or click **Add A New Reference Point Set** to add a new set.
- **Private Negotiated Rate Sets:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Private Rates discussion.

- **Private Negotiated Rates Set:** Select the Airline Rate Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Airline Rate Sets** link to go to the configuration page.
- The **Rules | Airline Rate Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles						
Back to Travel Rule												
<h2>Rules Airline Rate Sets</h2>												
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> </tr> </thead> <tbody> <tr> <td>A20</td> <td>No </td> </tr> <tr> <td colspan="2"> Add A New Airline Rate </td> </tr> </tbody> </table>							Set Name	Used In Rule	A20	No 	Add A New Airline Rate	
Set Name	Used In Rule											
A20	No 											
Add A New Airline Rate												

- Select the **Set Name** link to review the set or click **Add A New Airline Rate** to add a new set.
- **Train Private Rate Set:** Select the Train Private Rate Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Train Rate Sets** link to go to the configuration page.
- The **Rules | Train Rates Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles						
Back to Travel Rule												
<h2>Rules Train Rates Sets</h2>												
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> </tr> </thead> <tbody> <tr> <td>Northeast Corridor</td> <td>No </td> </tr> <tr> <td colspan="2"> Add A New Train Private Rate Set </td> </tr> </tbody> </table>							Set Name	Used In Rule	Northeast Corridor	No 	Add A New Train Private Rate Set	
Set Name	Used In Rule											
Northeast Corridor	No 											
Add A New Train Private Rate Set												

- Select the **Set Name** link to review the set or click **Add A New Train Private Rate Set** to add a new set.
- **Rental Car / Hotel Discount Code Set:** Select the Rental Car / Hotel Discount Code Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Rental Car / Hotel Discount Code Sets** link to go to the configuration page.
- The **Rules | Rental Car / Hotel Discount Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
Rules Rental Car/Hotel Discount Code Sets						
Rental Car/Hotel Discount Code Sets						
Set Name ▾		Used In Rule				
kf car/HOTEL set		No				
MC set		No				
Add A New Rental Car Discount Code Set						

- Select the **Rental Car / Hotel Discount Code Set Name** link to review the set or click **Add A New Rental Car Discount Code Set** to add a new set.
- **Hotel Private Rate Set:** Select the Hotel Private Rate Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Private Rate Sets** link to go to the configuration page.
- The **Rules | Hotel Private Rate Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
Rules Hotel Private Rate Sets						
Hotel Private Rate Sets						
Set Name		Used In Rule				
You do not have Sets for Negotiated Rates at this moment						
Add A New Hotel Private Rate Set						

- Select the **Hotel Private Rate Set Name** link to review the set or click **Add A New Hotel Private Rate Set** to add a new set.
- **Company Information:**

Note: Please refer to *Module 1: Roles and Responsibilities of Administrators* for configuration of Company Information discussion.

- **Company:** Select the Company previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Company Info** link to go to the configuration page.
 - The **Rules | Company Information** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Company Information</h2>						
Companies						
<u>Name</u> ▾		Used in Rule				
Acme Corp		No				
Add A New Company						

- Select the **Company Information** link to review the set or click **Add A New Company** to add a new set.
- **Custom Fields:**

Note: Please refer to *Module 2: Travel (Part One)* for configuration of Custom Fields discussion.

- **Custom Field Set:** Select the Custom Field Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Custom Fields Set** link to go to the configuration page.
 - The **Rules | Custom Field Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Custom Field Sets</h2>						
Custom Field Sets						
<u>Set Name</u>		Used In Rule		<u>Last Update</u>	Action	
Trip Reason		No		August 21, 2007		
Add A New Custom Field Set						


- Select the **Custom Field Set Name** link to review the set or click **Add A New Custom Field Set** to add a new set.
- **Enable Car Service with the following options:**

Note: Please refer to *Module 6: Longtail Services* for configuration of Car Service discussion.

- **Configuration:** Select the Configuration previously established from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Configurations** link to go to the configuration page.
 - The **Rules | Configurations** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Configurations</h2>						
Configurations						
Name ▾		Description			Used in Rule	
Car Service					No 	
Add A New Configuration						

- Select the **Configuration Name** link to review the set or click **Add A New Configuration** to add a new set.
- **Reference Points Set:** Select the Reference Points Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Reference Points Sets** link to go to the configuration page.
 - The **Rules | Reference Point Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Reference Point Sets</h2>						
Reference Point Sets						
Set Name		Used In Rule				
Reference Points		Yes				
Add A New Reference Point Set						

- Select the **Reference Point Set Name** link to review the set or click **Add A New Reference Point Set** to add a new set.
- **Payment Card Set:** Select the Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Payment Card Sets** link to go to the configuration page.
 - The **Rules | Corporate Payment Cards Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Corporate Payment Card Sets</h2>						
Corporate Payment Card Sets						
Set Name ▾		Used In Rule		Last Update		
XYZ hotel GTD		No		August 21, 2007 		
Add a new payment card set						

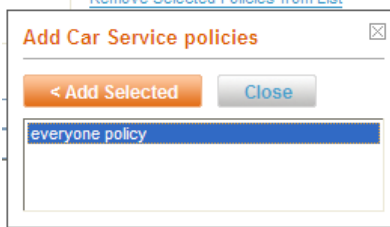
- Select the **Corporate Payment Cards Set Name** link to review the set or click **Add A New Payment Card Set** to add a new set.
- **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Site Payment Card Sets** link to go to the configuration page.
- The **Rules | Site Charge Cards Sets** page is displayed.



- Select the **Site Payment Cards Sets | Set Name** link to review the set or click **Add A New Site Payment Card Set** to add a new set.
- **Policies:** Select the Policy previously configured from the drop down list.
- If a new configuration is needed click the **Manage All Policies** link and click the **Add A New Policy** link.



- To add an existing policy to the list, click the **Add Policies to List** link, select the policy and click the **Add Selected** button.



- To Remove Policies from the list, click the policy to select it, and then click the **Remove Selected Policies from list** link to remove it from the list.
- To review an existing set, click the **Manage All Policies** link to go to the configuration page.
- To review an existing set, click the **Policies Name** link to go to the configuration page.

- If a new Policy is needed click the **Add A New Policy** link to go to the configuration page.
- **Enable Airport Parking service with the following options:**

Note: Please refer to *Module 6: Marketplace Services* for configuration of Airport Parking discussion.

- **Configuration:** Select the Configuration previously established from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Configurations** link to go to the configuration page.
- The **Rules | Configurations** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Configurations</h2>						
Configurations						
Name		Description			Used in Rule	
ABC CO .pdf					No	
Add A New Configuration						

- Select the **Configurations Name** link to review the set or click **New Configuration** to add a new configuration.
- **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Site Payment Card Sets** link to go to the configuration page.
- The **Rules | Site Charge Cards Sets** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Site Payment Cards Sets</h2>						
Site Payment Cards Sets						
Set Name		Used In Rule			Last Update	
Corp American Express Card		No			October 25, 2010	
Add a new site payment card set						

- Select the **Site Payment Cards Sets | Set Name** link to review the set or click **Add A New Site Payment Card Set** to add a new set.
- **Policies:** Select the Policy previously configured from the drop down list.
- To link an existing configuration to the rule, click the **Add Policies to List** link to go to the list of previously configured policies and make selections. Click the **Add Selected** button to add that policy to the rule.
- To Remove Policies from the list, click the policy to select it, and then click the **Remove Selected Policies from list** link to remove it from the list.

- To review an existing set or add a new one, click the **Manage All Policies** link to go to the configuration page.



8. Click **Save** to save changes to the Travel Rule configuration.
9. Click the **Changes not applied** link to commit changes. The Travel Service Rules have been established for the Everyone Group.

2.2 Groups Tab

Groups are used in the Deem application to define collections of users who have similar characteristics and can be gathered together for rule enforcement. By default, all users belong to the Everyone Group. Every new site has an Everyone Group.

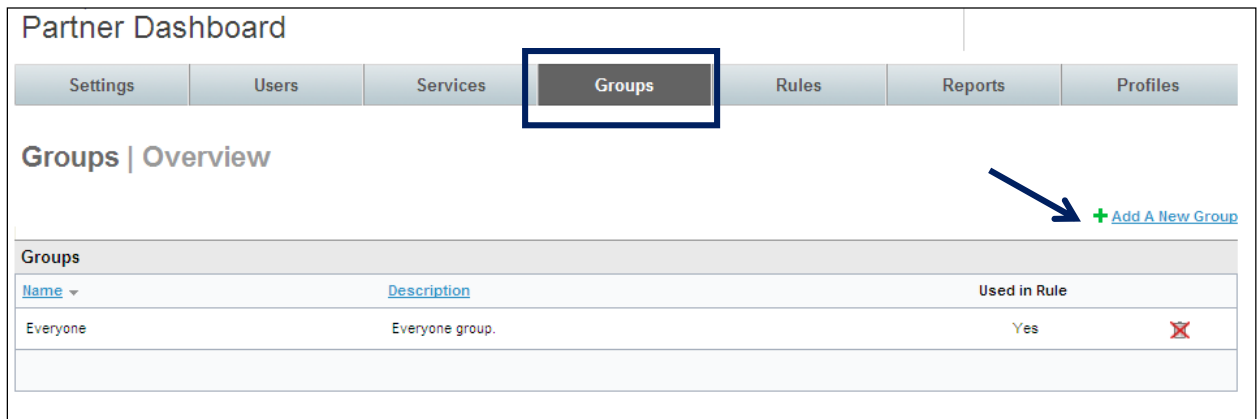
2.2.1 Travel Service Rules for Other Groups of Users

For the users we identified earlier (Michael and Jacque), we will need to set up 2 additional groups or collections of users for VIPs based on their country and VIP Indicator. We'll allow Agency and Display Configurations previously set up to be applied to the appropriate groups.

2.2.1.1 Defining Groups

First we will create a group to which we will add the VIP users.

1. Click the **Groups** tab and then the **Add a New Group** link.



2. The **Groups | Add Group** page is displayed.

3. Complete the page:

- **Group Name:** Enter a name that will be easily recognizable for the group (VIP, for example)

Note: Do not include any special characters in the Group Name.

- **Description:** Enter an optional group description.
- **Group Use:** Select the Rules where this group will be used.
 - **Service Rules:** Select this checkbox if the group will be displayed in the list of groups for Service Rules. (We have checked this box for the US VIP Group)
 - **Account Rules:** Select this checkbox if the group will be displayed in the list of groups for Account Rules.
 - **Groupware Rules:** Select this checkbox if the group will be displayed in the list of groups for Groupware Rules.
 - **Display Options Rules:** Select this checkbox if the group will be displayed in the list of groups for Display Options Rules. (We have checked this box for the US VIP Group)
 - **Web Services Rules:** Select this checkbox if the group will be displayed in the list of groups for Web Services Rules.
 - **Mobile Rules:** Select this checkbox if the group will be displayed in the list of groups for Mobile Rules.
 - **Dynamic Profile Attribute Assignment Rules:** Select this checkbox if the group will be displayed in the list of groups for Dynamic Profile Attribute Assignment Rules.
- **Group Parameters:** Select user criteria to define this group:
 - If **Group** was selected, select an existing Group name from the drop down list
 - If **User** was selected, a list of fields found on the user profile is displayed. Search criteria can include: External ID, User Name / Login, First Name, Middle Name, Last Name, Email, Work Phone, Home Phone, Employee ID, Mobile Phone, Employee

Status, Job Title, Job Level, Cost Center, Department Code, Department Name, Division, Business Unit, Company Name, Country Code, Groupware ID, Subdomain Short Name, Number of Credit Cards, Is Guest User, VIP Indicator, Employee Type, Is a Traveler, Dynamic Group Name and MIS 1 – 7.

Note: We have selected *VIP Indicator = Yes* to define the US VIP Group.

Note: Click the Add Parameter link if more than one Parameter is needed to define the group.

- 4. Click the **View Active Users** button to be sure the value used as the parameter is correct.

Group Parameters

And ...

User Vip indicator Equals Yes Remove

Add Parameter

View Active Users View All Users Save Cancel

- 5. A list of users who fit the criteria is displayed. Assure the list includes appropriate users. Click **Back** to return to the **Groups | Add Group** page.

Settings Users Services **Groups** Rules Reports Profiles

[Back to Add Group](#)

Groups | View Group Users

Results for "VIP"

Name	Email	Address
Michael Jordan	mjordan@reardencommerce.com	United States

Back

Note: If no users fit the criteria, the below page is displayed. Click Back to return to the Groups | Add Group page and adjust the selection criteria.

Settings Users Services **Groups** Rules Reports Profiles

[Back to Add Group](#)

Groups | View Group Users

Results for "VIP"

Name	Email	Address
No users found.		

Back

- 6. Click **Save** to save the group.

View Active Users View All Users Save Cancel

7. Repeat this process for each group of users needed. For our example, we will also need to create a group for Canadian VIP Users.
8. Click the **Add Group** link again. The **Groups | Add Group** page is displayed.

9. Be sure to use both the VIP Indicator and the Country Code as group Parameters when creating the Canadian VIP group to differentiate it from the US VIP group. Click **Save**.
10. The **Groups | Overview** page is re-displayed with the new group.
11. Click the **Changes not applied** link to commit changes. **Commit** the changes.

Important Note: By using the “Is a Traveler” designation, the number of profiles that are sent to the GDS can be limited to just the users who are travelers. We recommend a group be added that represents the travelers. Select the group parameter of “Is a Traveler” to define this group. Only those users who have Travel Preferences will be included in this group.

2.3 Applying Rules for Other Groups of Users

Now that we have configured rules for the **Everyone Group**, and added 2 groups let’s set up travel rules for these other groups of users.

For our example, Michael and Jacque have been set up in separate groups. We will need to do 2 things:

- i. Set the correct Priority for the groups
- ii. Configure rules for the VIP Groups based on their country code and VIP Indicator

2.3.1 Working with Rule Priorities

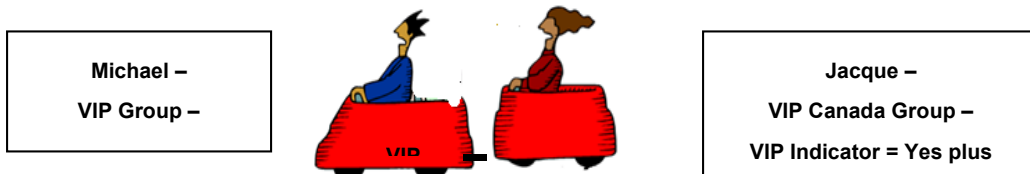
When rules are enforced, the Group selection parameters are engaged to determine the group into which the user falls. The rule for the group closest to the top is processed first. A user can belong to more than one group, but the group highest on the list to which they belong will be the rule that is enforced.

Take a look at how the groups are currently prioritized.

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Shopping
10	Corporate Manager	Edit	Add	Add	Add	Add	Add	Add
20	Executive VP US	Add	Add	Add	Add	Edit	Edit	Edit
30	Executive VP in Canada	Add	Add	Add	Add	Edit	Edit	Edit
	Everyone	Add	Add	Add	Edit	Edit	Edit	Add

Save Priority Changes Cancel

The users will be funneled first through the Travel column top to bottom where there are rules enabled.

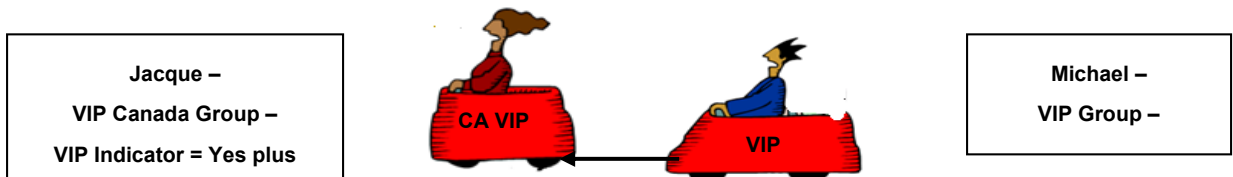


The VIP US Group is higher than VIP Canada Group therefore the VIP US Group’s selection parameters will be taken into consideration first to select users who meet the Group criteria. In our example, both Michael and Jacque have the VIP Indicator set to “Yes” as the selection parameter, therefore both Michael and Jacque will be selected. When the top most group finishes selecting users, the second group will select users that meet its selection parameters. Since Jacque has already been selected, he will be bypassed.

By reprioritizing the groups, Michael will be selected for the VIP US Group and Jacque will be selected for the VIP Canada Group.

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Shopping
10	Corporate Manager	Edit	Add	Add	Add	Add	Add	Add
20	Executive VP in Canada	Add	Add	Add	Add	Edit	Edit	Edit
30	Executive VP US	Add	Add	Add	Add	Edit	Edit	Edit
	Everyone	Add	Add	Add	Edit	Edit	Edit	Add

The users will be funneled through the VIP Canada Group selection parameters first.



Now, Jacque will follow the CA VIP Group rule and Michael will follow the VIP Group rule.

3 On Demand Reporting

Administrators can schedule detail reports for later retrieval through the Reports Tab.

- A Maximum of 10 detailed reports no more than 3 years prior to today and containing no more than 3 months of data may be stored
- A Maximum of 10 summary reports with 1 year of data (not changeable) may be stored
- A Maximum of 3 instances of the same report per domain may be stored
- Available scheduling options:
 - One Time Only – run Now
 - Recurring – Daily, Weekly, Bi-weekly, Monthly
- Report format: CSV, ZIP and PDF
- Notification Email sent upon schedule completion to a specific email address

3.1 Reports Tab

Click the **Reports** tab. The **Reports | Overview** page is displayed.

Note: If Expense is enabled for the site, the second tab (Expenses) will be shown. If Expense is not enabled, the tab will not be shown.

Reports | Overview

Scheduler Expenses

Setup your reporting schedules and access your reports.

View Summary and Detail Reports
Download the service activity summary and detail reports generated for the existing schedules. The 3 most recent reports generated for each schedule are maintained.

Schedule a Report
Create a new schedule to generate summary and detailed reports. You can schedule a Maximum of 10** reports overall, and a maximum of 3 extracts per service.

Manage Schedules
View, Edit and Delete existing report generation schedules.

- **View Summary and Detail Reports:** Download the service activity summary and detail reports generated for the existing schedules. The 3 most recent reports generated for each schedule are maintained.
- **Schedule a report:** Create a new schedule to generate summary and detailed reports. Schedule a maximum of 10 reports overall, and a maximum of 3 extracts per service.
- **Manage Schedules:** View, Edit and Delete existing report generation schedules.

3.1.1 View Summary and Detail Reports

1. Click the **View Summary and Detail Reports** link. The **Reports | View Summary and Detail Reports** page is displayed.

[Back to Overview](#)

Reports | View Summary And Detail Reports

View and Download the Summary and Detail Reports. The 3 most recent reports are maintained for each schedule.

Service Activity Reports and Extracts	
Scheduled Job Name	Reports
Total PNRs	8-14-2013.pdf
om	12-17-2013.zip
rail	4-3-2014.zip
test	2-19-2014.zip

2. Click the file name to download the report. The file download popup is displayed.
3. Click the **Open** button to open the file, or the **Save** button to save the report file to the hard drive.

3.1.2 Schedule a Report

Click the **Schedule a Report** link. The **Reports | Schedule a Report** page is displayed.

Note: In this example, the report will run monthly beginning on May 1st and has no end date. The report is an Airport Parking Detail Report for the last 31 days. The report will be named Airport Parking Detail and upon completion, an email will be sent to christine.bland@deem.com.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Overview						
<h2>Reports Schedule A Report</h2>						
Schedule summary and detail reports for service activities in your domain.						
Schedule Options						
Schedule: <input type="text" value="Now"/>						
Report Options						
Service: <input type="text" value="Travel"/>						
Report: <input type="text" value="Airport_Parking_Detail"/>						
Report Data From: <input type="text"/> (MM/DD/YYYY)						
Report Data To: <input type="text"/> (MM/DD/YYYY)						
Job Options						
New Job Name: <input type="text"/>						
Job Completion Email: <input type="text"/> (optional) <input type="text"/>						
<input type="button" value="Submit"/>						

Note: In this example, the report will run “Monthly”. The report is an Airport Parking Detail Report. The report will be named Airport Parking Detail and upon completion, an email will be sent to the address entered.

Settings	Users	Services	Groups	Rules	Reports	Profiles
----------	-------	----------	--------	-------	----------------	----------

[Back to Overview](#)

Reports | Schedule A Report

Schedule summary and detail reports for service activities in your domain.

Schedule Options

Schedule:

Start Month:

Occurs On (Day Of Month):

Duration: No end date
 Through end date

Report Options

Service:

Report:

For the last: days

Job Options

New Job Name:

Job Completion Email: (optional) ⓘ

3.1.3 Manage Schedules

1. Click the **Manage Schedules** link. The **Reports | Manage Schedules** page is displayed.

Job Name	Report Name	Type	Schedule	Status	Last Run Result	Last Run Date	Next Run Date	Edit	Delete
Car Rental Detail Jan thru Apr	Car_Rental_Detail	NOW		COMPLETED	SUCCESSFUL	4/1/2009		Edit	Delete
Car Service Detail Month of May 2008	Car_Services_Detail	NOW		COMPLETED	SUCCESSFUL	10/28/2008		Edit	Delete
Event Details Aug 2007	Event_Tickets_Detail	NOW		COMPLETED	SUCCESSFUL	10/28/2008		Edit	Delete
Flight Detail	Flight_Detail	NOW		COMPLETED	SUCCESSFUL	10/28/2008		Edit	Delete
Flight Summary generated October 2008	Flight_Summary	NOW		COMPLETED	SUCCESSFUL	10/28/2008		Edit	Delete
Hotel Detail Jan 2006	Hotel_Detail	NOW		COMPLETED	SUCCESSFUL	10/28/2008		Edit	Delete
Packship Details Dec 2005	Package_Shipment_Detail	NOW		COMPLETED	SUCCESSFUL	10/28/2008		Edit	Delete

2. Click the **Edit** link to edit the report detail. The **Reports | Schedule a Report** page is displayed.

Schedule summary and detail reports for service activities in your domain.

Schedule Options

Schedule:

Report Options

Service:

Report:

Report Data From: (MM/DD/YYYY)

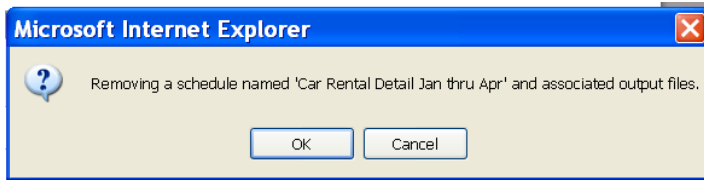
Report Data To: (MM/DD/YYYY)

Job Options

New Job Name:

Job Completion Email: (optional) ⓘ

- Click the **Delete** link to delete the scheduled report. The warning popup is displayed. Click **OK** to delete the scheduled future jobs.



3.2 Report Samples

3.2.1 Airport Parking:

Request Name	Request Date	User Id	Confirmation Number	Delegate Id	Delegate Firstname	Delegate Lastname	First Name	Last Name	Facility Name	Dropoff Airport	Dropoff Address 1	Dropoff Address 2
Airport Parking at PHL on Apr 11, 2010	04/01/10	555555	P0528455	555555	John	Doe	John	Doe	FASTTRACK South	PHL		
Airport Parking at DTW on Apr 12, 2010	04/01/10	555556	P0527999	555556	Jane	Doe	Jane	Doe	Airlines Parking	DTW		
Airport Parking at ORD on Apr 06, 2010	04/02/10	555557	P0529888	555557	John	Smith	John	Smith	AviStar	ORD		
Airport Parking at DFW on Apr 12, 2010	04/02/10	555558	P0529777	555558	Jane	Smith	Jane	Smith	PARK 'N FLY	DFW		

Dropoff City	Dropoff State	Dropoff Date	Parking Type	Rate	Company Currency	Company Cost	Cost Center	Department Code	Department Name	Business Unit	Division	Out Of Policy Reason	Company Id
		04/11/10	C	31.44	USD	33.44	10041230	Technology & Operations	ITG Enterprise Infrastructure	11000	ABC		999999
		04/12/10	A	40	USD	40	10023752	U.S. Business	Benefit Services Organization	11000	AAA		999999
		04/06/10	C	43.24	USD	43.24	10023831	Investments	Real Estate	11000	CCC		999999
		04/12/10	A	32.12	USD	34.77	40683001	Individual Business	Sales Distribution	41000	DDD		999999

3.2.2 Flight Cancellation:

Traveler First Name	Traveler Last Name	Delegate First Name	Delegate Last Name	Purchase Date	Cancellation Date	Cancellation Action	Issuing Carrier Name	Ticket Number	Total Fare	Currency
M	SMITH	JANE	DOE	9/20/2010	9/20/2010	VOID		17922244444		
M	SMITH	JANE	DOE	9/20/2010	9/20/2010	VOID		17922244444		
W	DOE	JOHN	SMITH	9/20/2010	9/21/2010	VOID	Alaska Airlines	27722244444		
W	DOE	JOHN	SMITH	9/20/2010	9/21/2010	VOID	Alaska Airlines	27722244444		
M	WHITE	JOE	SMITH	9/20/2010	9/22/2010	REFUND		67922277777		

3.2.3 Hotel Details:

Company Id	Request Name	Request Date	User Id	First Name	Last Name	Guest Name	Hotel Chain	Property Name	Property Address	Property City	Property State	Property Zip	Property Country	Check In Date	Departure Date	Number Of Guests
1111111	test htl only dom ADD c	06/29/10	jDoe	John	Doe		Homewood	Homewood	3620 W Ave	Sioux Falls	South Dak	57108	United Stat	09/28/10	09/29/10	1
1111112	DEN SFO	06/29/10	jDoe	Jane	Doe		Hyatt	Hyatt Sum	400 Conco	Belmont	California	94002	United Stat	08/26/10	08/27/10	1
1111113	Trip to Chicago, IL, US	06/29/10	jDoe	Jane	Doe		Hilton Hote	The Drake	140 E Walt	Chicago	Illinois	60611	United Stat	09/10/10	09/15/10	1
1111114	multi trip EWR STL MCI	06/29/10	jDoe	John	Doe		Hampton Ir	Hampton Ir	10820 Pea	St Louis	Missouri	63074	United Stat	09/07/10	09/08/10	1
1111115	multi trip EWR STL MCI	06/29/10	jDoe	John	Doe		Hyatt	Hyatt Place	5001 W 111	Overland P	Kansas	66211-122	United Stat	09/08/10	09/09/10	1
1111116	multi trip EWR STL MCI	06/29/10	jDoe	John	Doe		Hyatt	Hyatt Place	1899 Sulliv	College Par	Georgia	30337	United Stat	09/09/10	09/10/10	1

DEEM TRAVEL - PARTNER DASHBOARD TRAINING – MODULE 4

Daily Rate	Room Type	Confirmation Number	Record Locator	Cost Center	Department Code	Department Name	Business Unit	Division	Company	Out Of Policy Reason	Company Name	Last User Modified Time	Creation Time	Process Id	Sequence Id
119	Suite	88059XXX	ABCDE	5050					Acme		Acme	06/29/10	06/29/10	12121211	648585811
119	Suite	HY004190(AAAAA)		1234					Acme		Acme	06/29/10	06/29/10	12121212	648615046
279		3393521(X)BBBBB		1234					Acme		Acme	06/29/10	06/29/10	12121213	648605926
139	Queen	82847XXX	CCCCC	5050					Acme		Acme	06/29/10	06/29/10	12121214	648513691
109	Other	HY004184(DDDDD)		5050					Acme		Acme	06/29/10	06/29/10	12121215	648513706
109	Other	HY004184(EEEEE)		5050					Acme		Acme	06/29/10	06/29/10	12121216	648513721

Sequence Id	Currency Code	Number Of Days	Company Cost	Company Currency Code	Account Type	Booking Source	Out Of Policy Explanation	Property Number	Delegate Id	Delegate First Name	Delegate Last Name	Subdomain Name	Booking Type	Rate Type
648585811	USD	1	119	USD	0	Sabre		5097	jDoe	John	Doe	Acme	Online	Non-Private Rate
648615046	USD	1	119	USD	0	Sabre		SFOXS	jDoe	Jane	Doe	Acme	Online	Non-Private Rate
648605926	USD	6	0	USD	0	Sabre		05827	jDoe	Jane	Doe	Acme	Offline	Non-Private Rate
648513691	USD	1	139	USD	0	Sabre		4074	jDoe	John	Doe	Acme	Online	Non-Private Rate
648513706	USD	1	109	USD	0	Sabre		MKCZC	jDoe	John	Doe	Acme	Online	Non-Private Rate
648513721	USD	1	109	USD	0	Sabre		ATLZS	jDoe	John	Doe	Acme	Online	Non-Private Rate

3.2.4 Rail Details:

PROCESS ID	COMPANY ID	COMPANY PROVIDER	LAST MODIFIED TIME	CREATION TIME	USER FIRST NAME	USER LAST NAME	PASSENGER FIRST NAME	PASSENGER LAST NAME	USER ID	CUSTOMER ID	DELEGATE ID
223861247	9999999	Testsite	Wandrian 1900-01-01 00:00:00.0	2010-04-05 14:23:36.0	John	Doe	John	Doe	5555555	32115555	32115555
218593007	9999999	Testsite	Wandrian 1900-01-01 00:00:00.0	2010-04-05 12:49:48.0	Sue	Davis	John	Davis	7777777	31709333	31709333
218593007	9999999	Testsite	Wandrian 1900-01-01 00:00:00.0	2010-04-05 12:49:48.0	Sue	Davis	John	Davis	7777777	31709333	31709333
225274187	9999999	Testsite	Wandrian 1900-01-01 00:00:00.0	2010-04-05 13:54:22.0	Jane	Smith	Jane	Smith	3333333	32084555	32084555
225274187	9999999	Testsite	Wandrian 1900-01-01 00:00:00.0	2010-04-05 13:54:22.0	Jane	Smith	Jane	Smith	3333333	32084555	32084555

ID	DELEGATE FIRST NAME	DELEGATE LAST NAME	DEPARTMENT CODE	DEPARTMENT NAME	BUSINESS UNIT	DIVISION	COST CENTER	MARKETING CARRIER NAME
	John	Doe	Technology & Operations	ITG Enterprise Infrastructure	11000	ITG Enterprise Infrastructure	10023875	Amtrak
	Sue	Davis	Human Resources	HR	11000	HR	10021162	Amtrak
	Sue	Davis	Human Resources	HR	11000	HR	10021162	Amtrak
	Jane	Smith	U.S. Business	Manufacturing	11000	Manufacturing	10020757	Amtrak
	Jane	Smith	U.S. Business	Manufacturing	11000	Manufacturing	10020757	Amtrak
	John	Smith	Technology & Operations	ITG- Global Applications	11000	ITG- Global Applications	10021157	Amtrak

NAME	MARKETING SERVICE NAME	TRAIN NUMBER	DEPARTURE	DEPARTURE	ARRIVAL	ARRIVAL	CONFIRMATION NUMBER	RECORD LOCATOR	TICKET TYPE	CLASS OF	BASE PRICE	TOTAL PRICE	CURRENCY
	Acela Express	2166	NYP	NYP	BBY	01CXXX		B-REARDEN- QZC077777	TVM	Business	86	86	
	Acela Express	2160	NYP	NYP	RTE	00DXXX		B-REARDEN- VWD077777	TVM	Business	237	237	
	Acela Express	2255	RTE	RTE	NYP	00DXXX		B-REARDEN- VWD077777	TVM	Business	237	237	
	Northeast Regional	94	WAS	WAS	NYP	16BXXX		B-REARDEN- KUL077777	TVM	Coach	176	176	
	Northeast Regional	161	NYP	NYP	WAS	16BXXX		B-REARDEN- KUL077777	TVM	Coach	176	176	
	Northeast Regional	493	WFD	WFD	NHV	1008AA		B-REARDEN- CWF019999	TRX	Coach	172	172	

CURRENCY	COMPANY COST	COMPANY CURRENCY CODE	DEPARTURE DATE	ARRIVAL DATE	OUT OF POLICY	PURPOSE OF TRIP
USD	86	86	2010-05-05 16:00:00.0	2010-05-05 17:05:00.0		
USD	237	237	2010-05-05 08:10:00.0	2010-05-05 11:25:00.0		
USD	237	237	2010-05-02 15:00:00.0	2010-05-02 17:52:00.0		
USD	176	176	2010-04-13 06:00:00.0	2010-04-13 08:46:00.0		
USD	176	176	2010-04-12 05:24:00.0	2010-04-12 08:45:00.0		

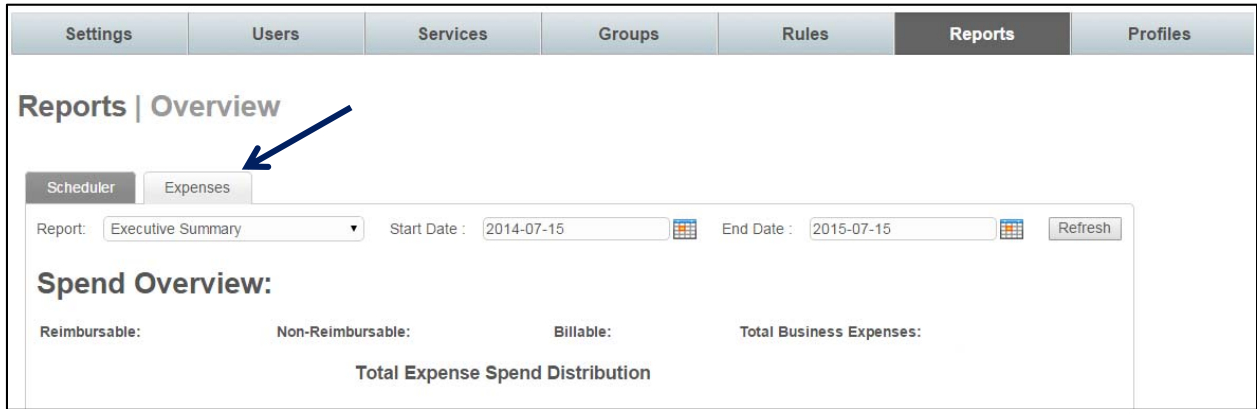
3.2.5 Unused Tickets:

Traveler First Name	Traveler Last Name	Delegate First Name	Delegate Last Name	Purchase Date	Cancellation Date	Issuing Carrier Name	Ticket Number	Total Fare	Currency	Penalty Amount	Unused Ticket Value	Expiration Date	Record Locator
JENNY	SMITH			10/14/2010	11/3/2010	Alaska Airlines	27792819999	377.6	USD	75	377.6	10/14/2011	ABCDEF
DANIEL	DOE			11/4/2010	11/23/2010	Delta Air Lines	6793297777	206.5	USD	150	206.5	11/4/2011	CCCCC
CHRISTOPHER	DOE			12/21/2010	12/21/2010	Delta Air Lines	6815488888	32.14	USD	0	32.14	4/7/2011	

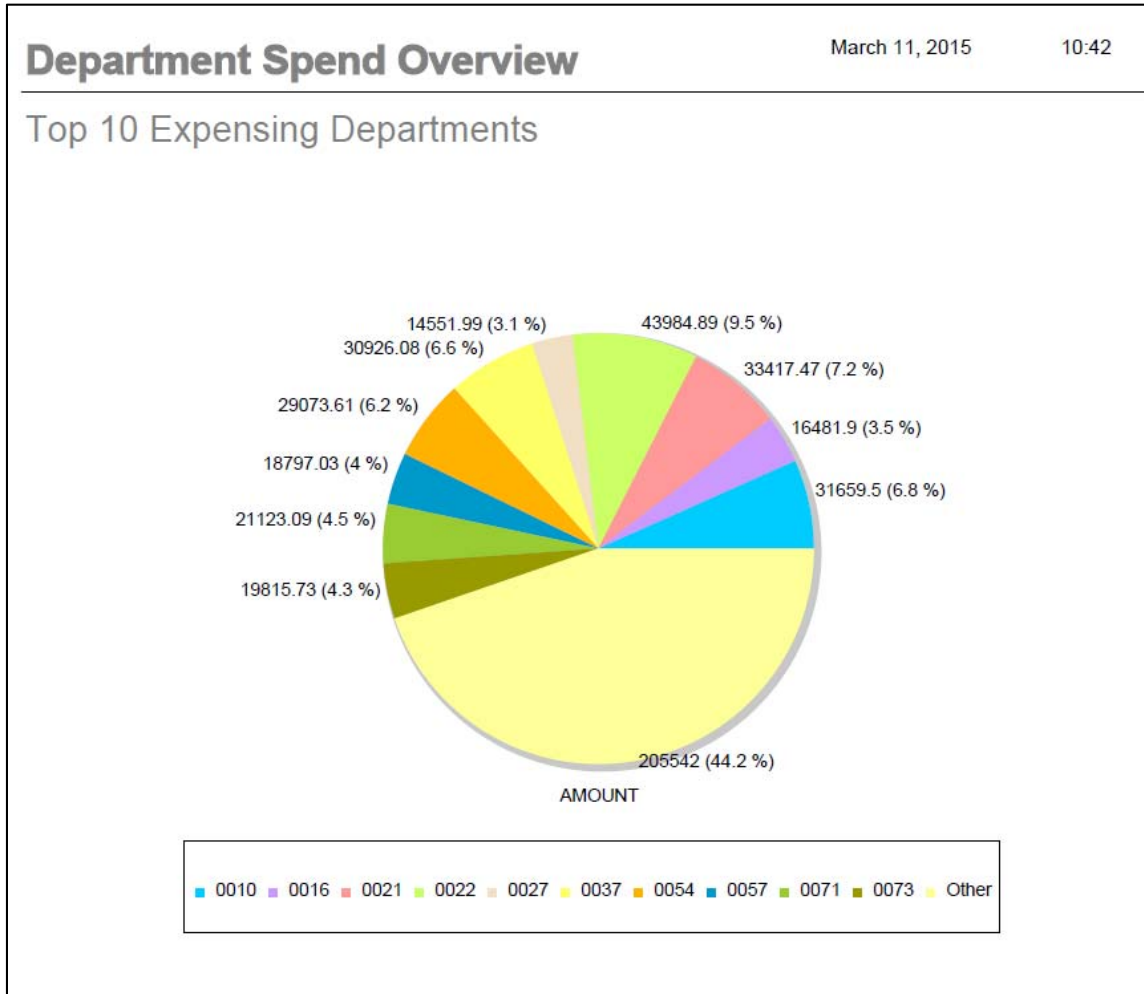
3.2.6 Expense:

Note: If Expense is enabled for the site, the second tab (Expenses) will be shown. If Expense is not enabled, the tab will not be shown.

Click the **Expense** tab to display Expense Reporting options.



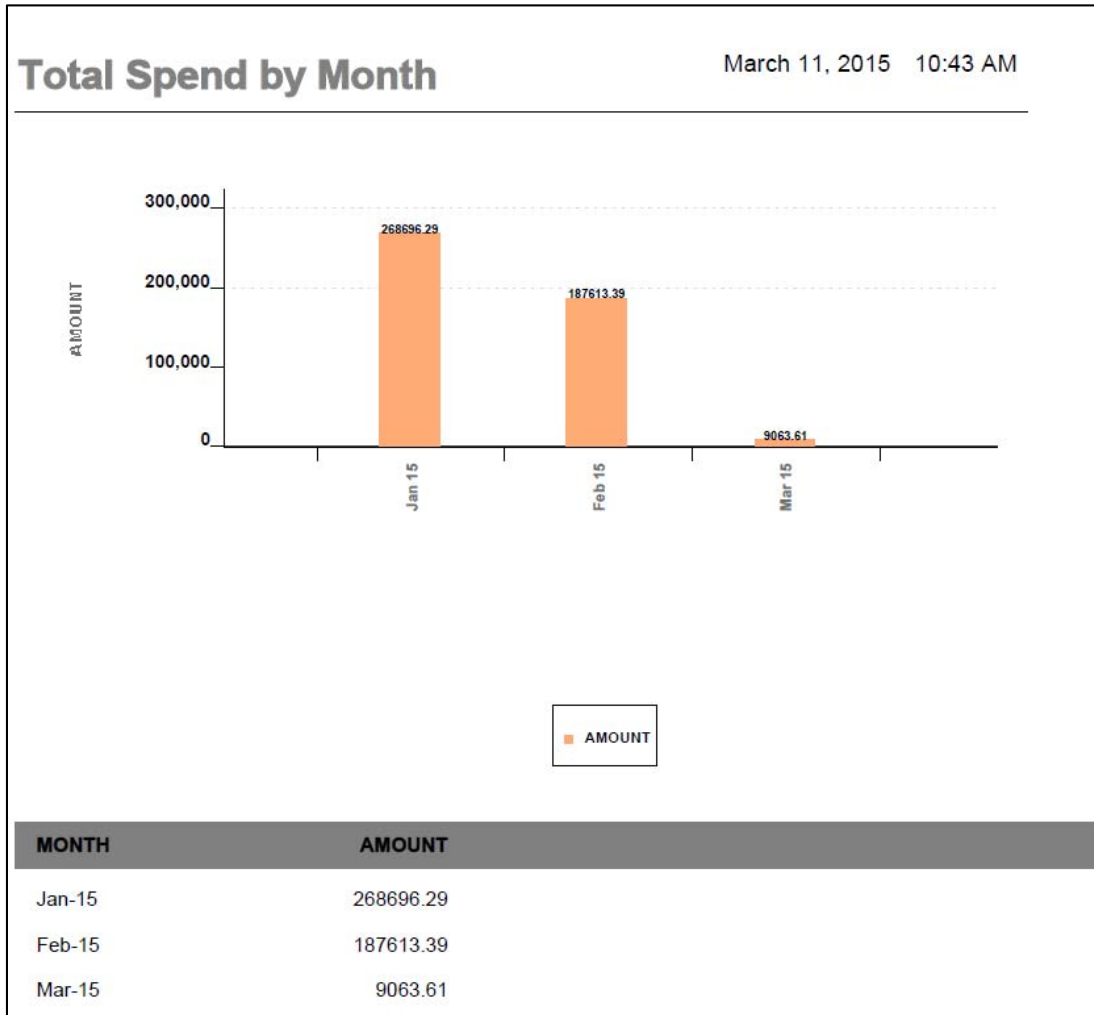
3.2.6.1 Department Spend Overview Report



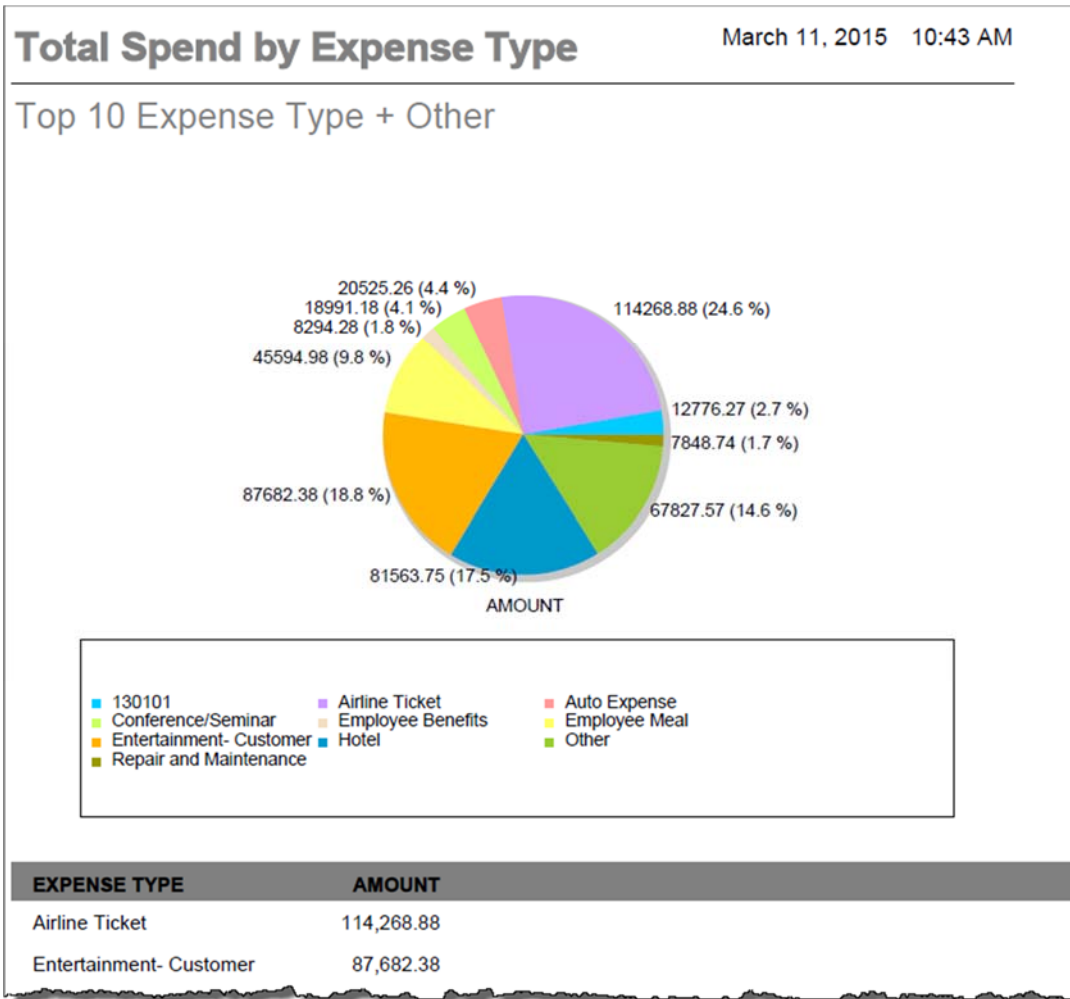
DEPARTMENT	AMOUNT
0022	43,984.89
0021	33,417.47
0010	31,659.50
0037	30,926.08
0054	29,073.61
0071	21,123.09

3.2.6.2 Executive Summary:

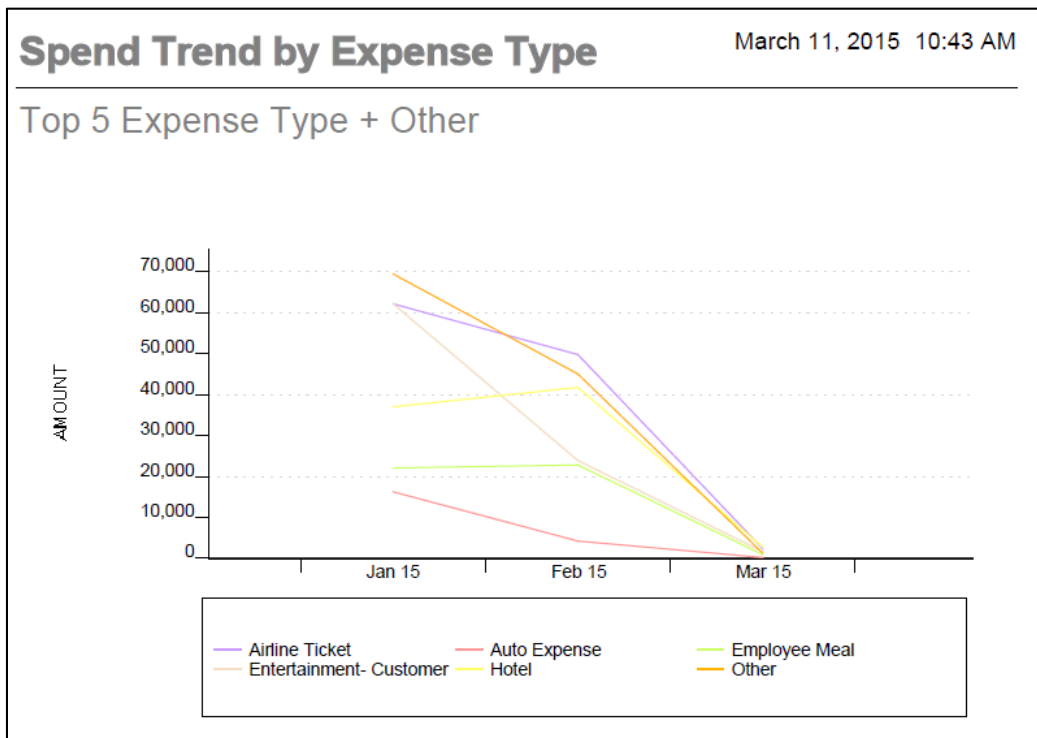
3.2.6.2.1 Total Spend by Month



3.2.6.2.2 Total Spend by Expense Type



3.2.6.2.3 Spend Trend by Expense Type



3.2.6.3 Top Expense Report Submitters

	A	B	C	D	E	F
1	FIRST NAME	LAST NAME	IDENTIFICATION EMAIL	DEPARTMENT	AMOUNT	CURRENCY
2	MICHAEL	JONES	mjones@acme.com		21 23,998.79	USD
3	NANCY	SMITH	nsmith@acme.com		54 18,044.87	USD

3.2.6.4 Expense Type Spend Detail

	A	B
1	EXPENSETYPE	AMOUNT
2	Airline Ticket	70,586.19
3	Hotel	51,634.21
4	Entertainment- Customer	33,770.20