SIS Webinar #1

New SIS Functionalities - Are you making the most of them?

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IATA

Agenda

Key features and functionalities deployed in SIS Production in 2019 (November 2019 - Release 1.15 and May 2019 - Release 1.14):

- Contact management
- Changes to user and contact management data retention policy [Nov-19]
- Payment status for 'MISC' invoices and the new data purging process [Nov-19]
- New passenger rejections analysis report [May-19]
- New correspondence aging report and alerts [May-19]

Contact management

Contact management

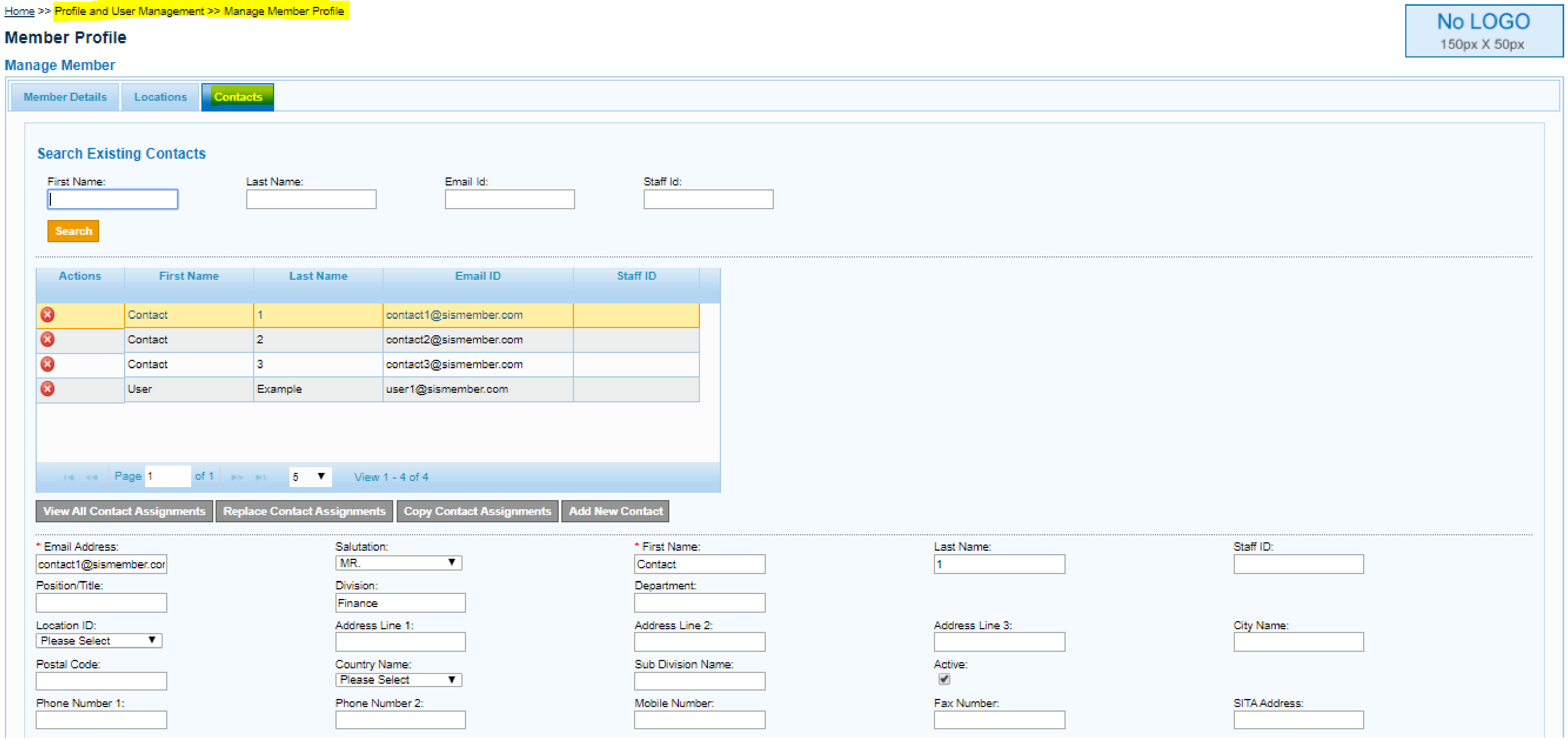
- SIS contacts are email addresses that are assigned to receive important and timely automated email alerts for SIS processing activities, such as:

  - Correspondence alerts;
  - File validation/sanity check report notifications;
  - SIS output file availability;
  - Clearing House (ICH/ACH) advice and clearance notifications;
  - Reports availability.

- Important!
  - A contact does **not** need to be a user; they can be active as stand-alone contacts;
  - Only **SIS super-users** or users with the appropriate permissions can add/manage contacts;
  - It is very important for **contacts to be regularly maintained** for SIS member accounts to make the most of the related SIS functionalities and features.

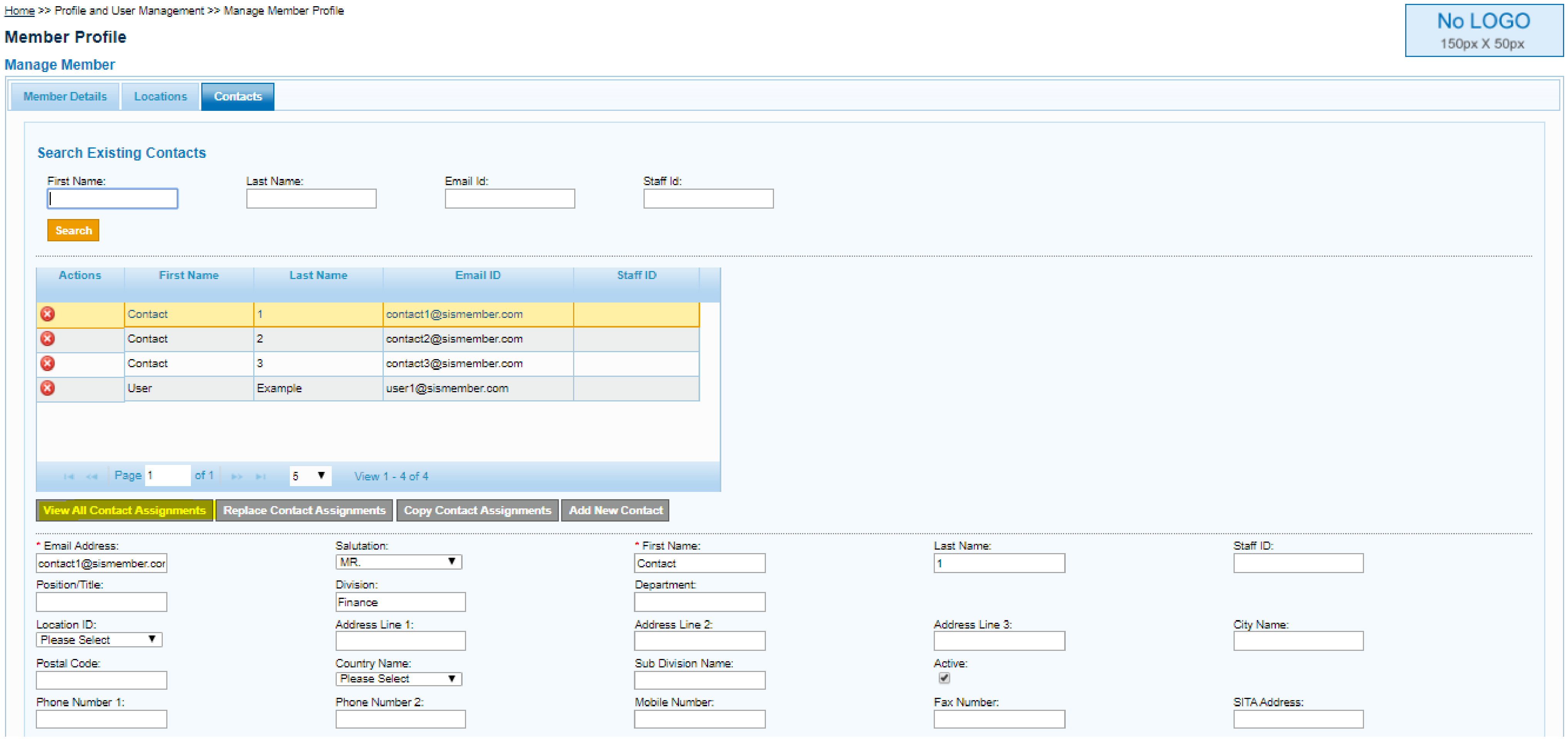
Contact management

- Retrieve your SIS contacts: Profile and User Management >> Manage Member Profile - 'Contacts' tab



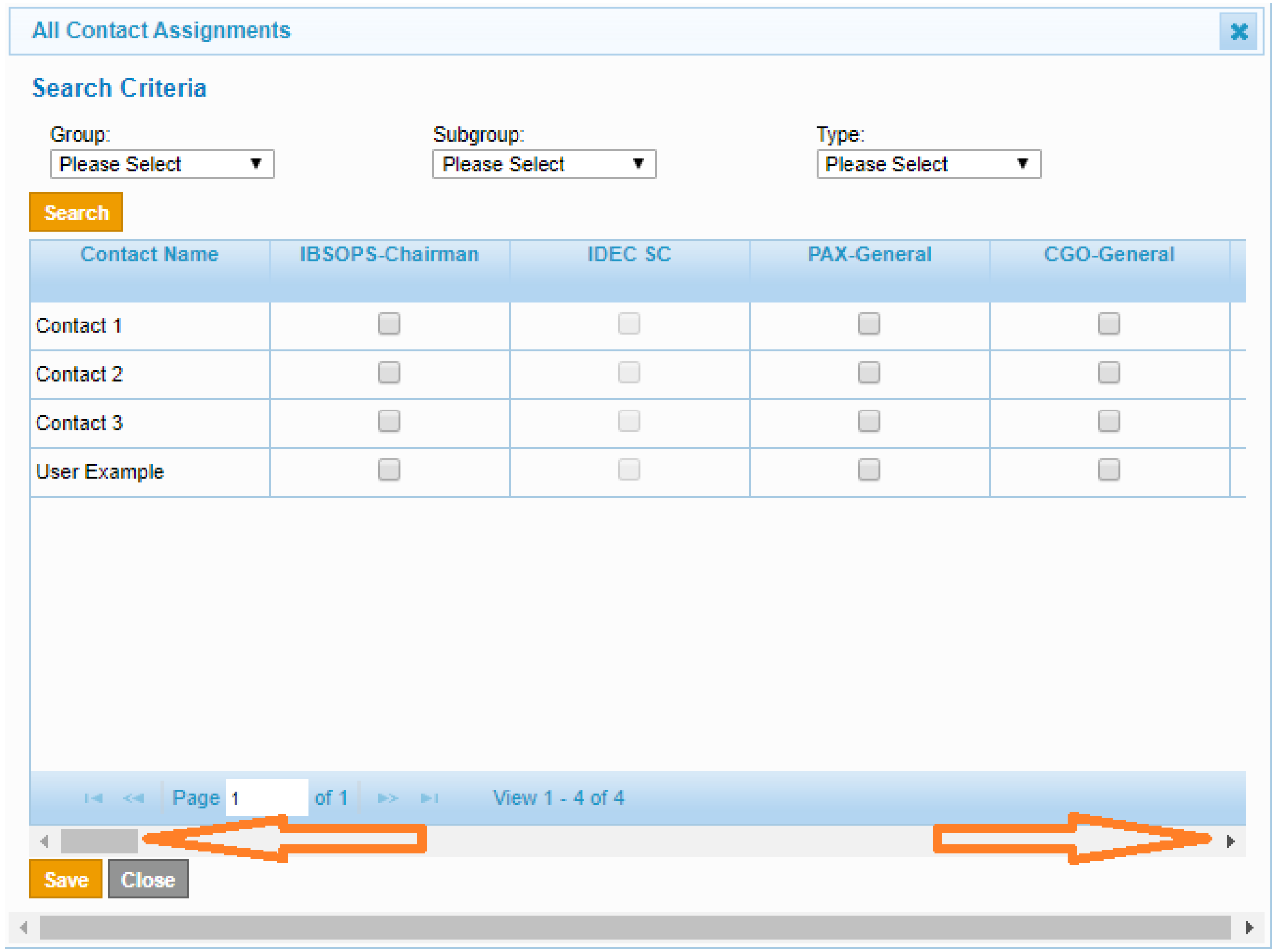
Contact management

- View your SIS contacts' email alert assignments: Click 'View All Contact Assignments'



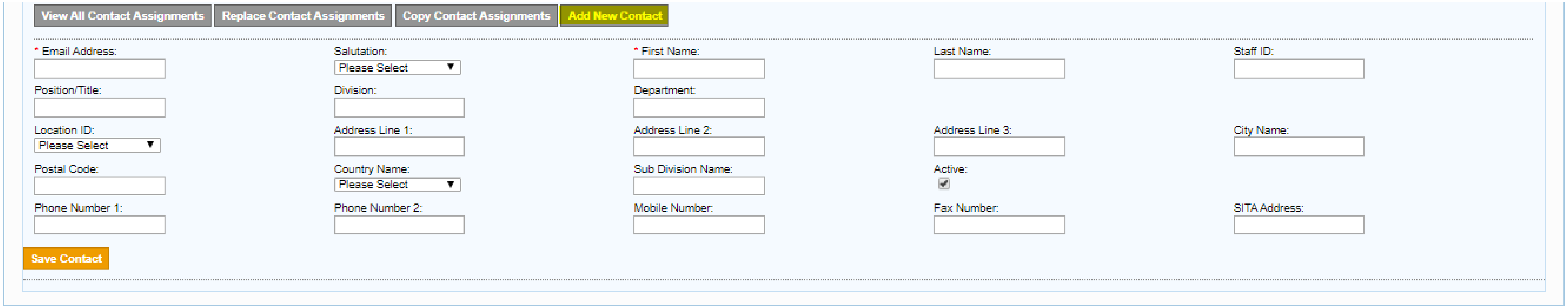
Contact management

- Assign contacts email alerts: New window should pop-up to display all your active SIS contacts and their email alert assignments. Users with appropriate permissions will be able to add/remove contact assignments in this window.



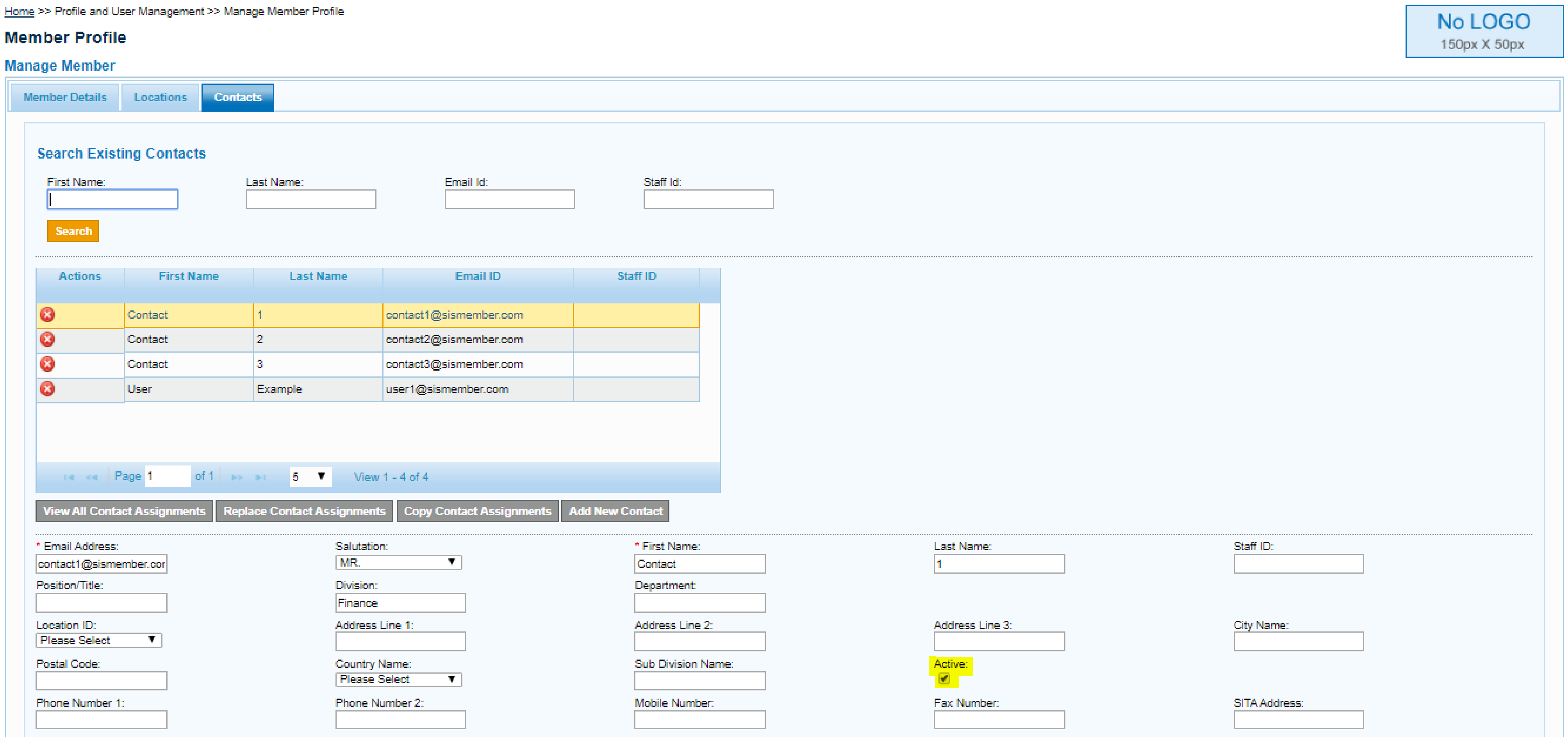
Contact management

- <u>Add New Contact</u>: Users with appropriate permissions will be able to add new contacts by entering the fields on the contact details form and save.



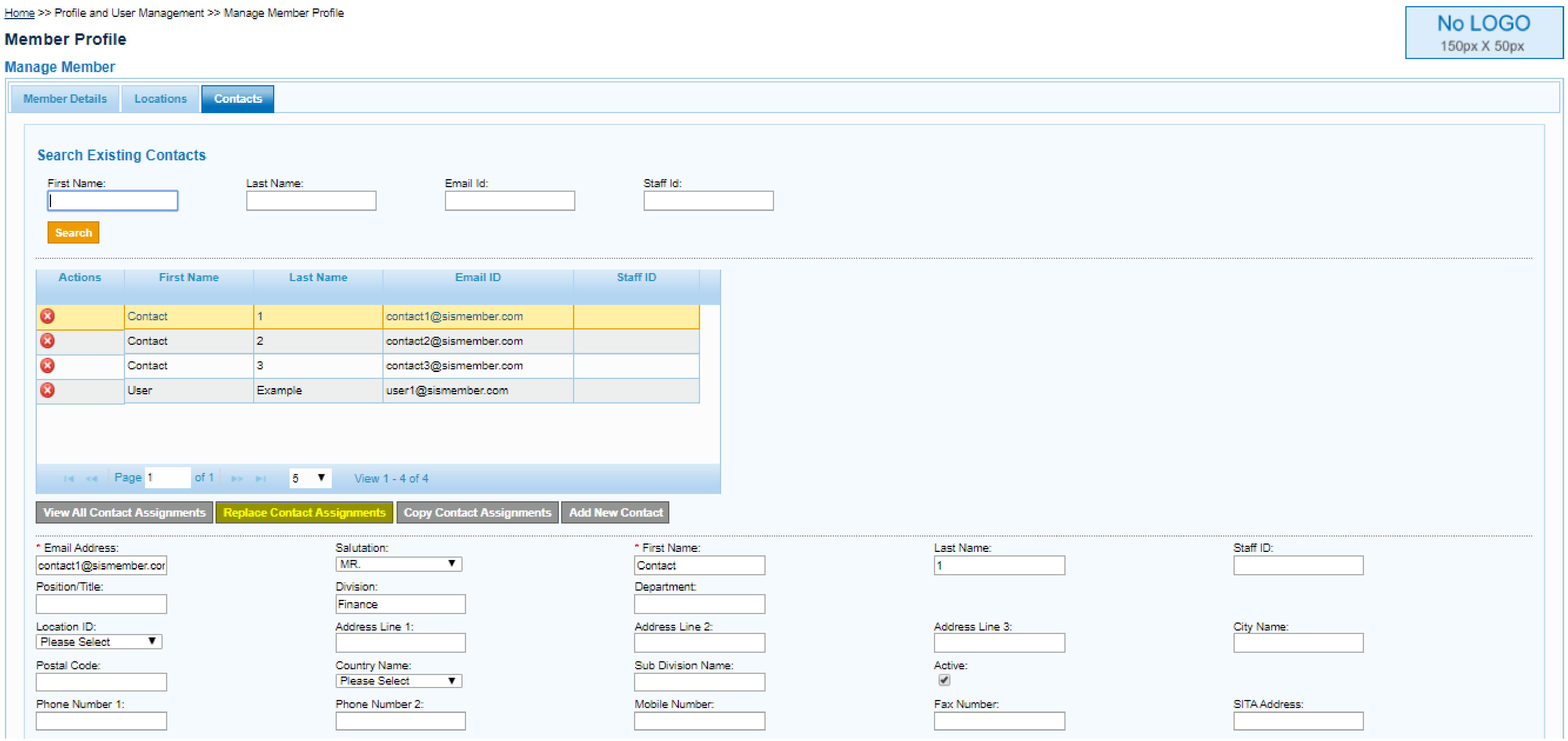
Contact management

- <u>Deactivate Contact:</u> Users with appropriate permissions will be able to deactivate a contact by ticking or un-ticking the check-box to activate or deactivate a contact respectively under 'Active' in the contact details.



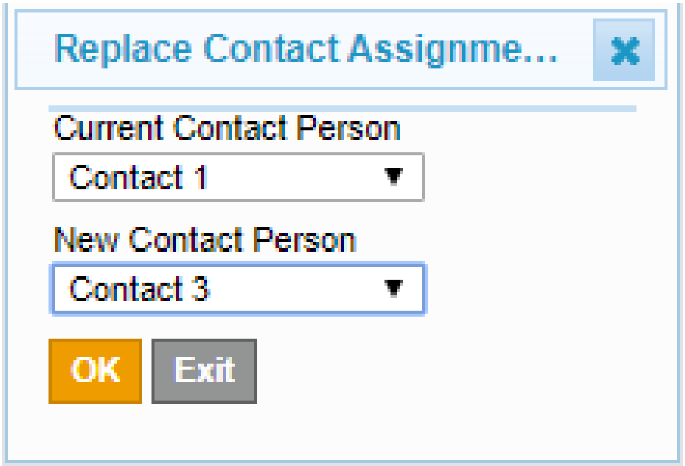
Contact management

- <u>Replace Contact Assignments</u>: Click 'Replace Contact Assignments'



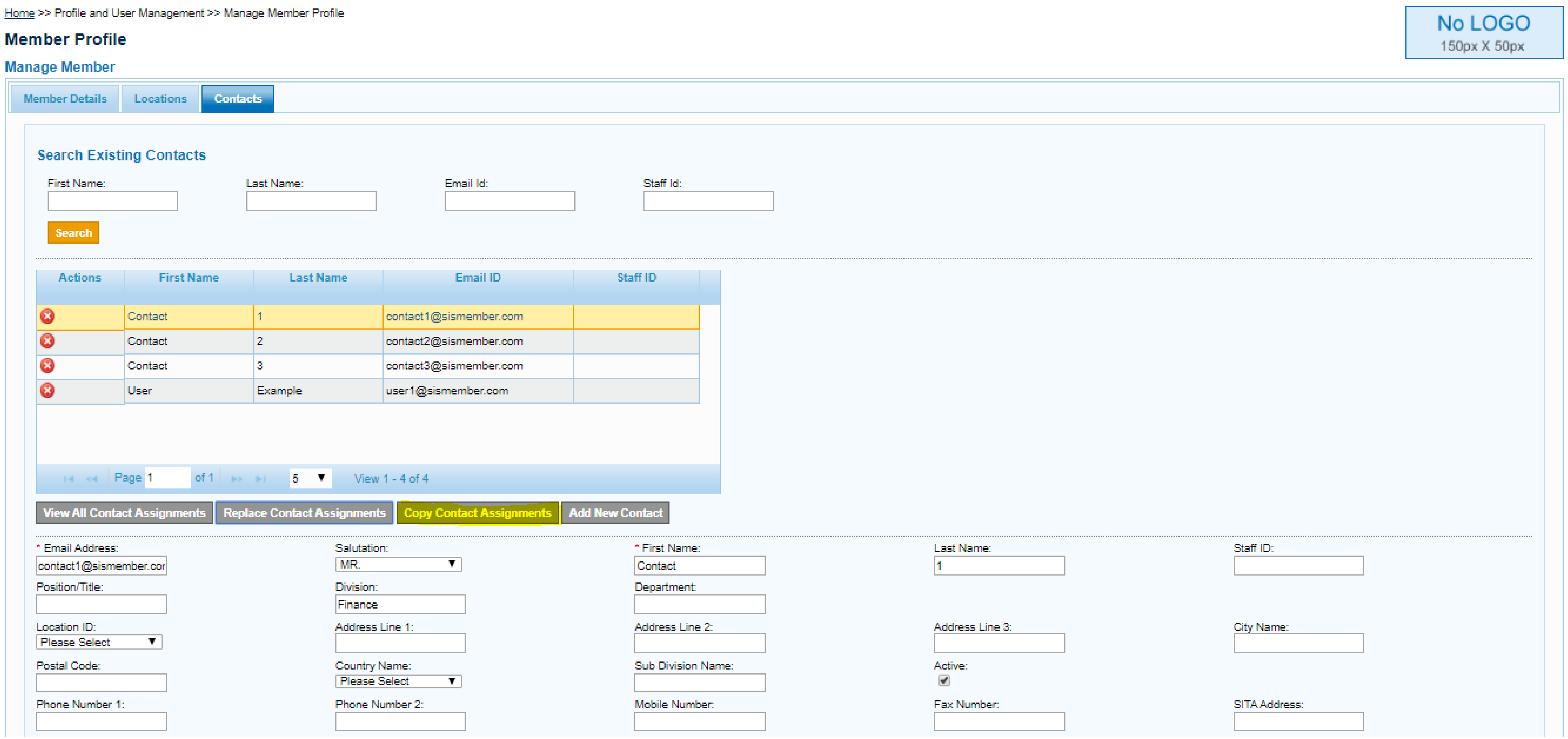
Contact management

- Replace Contact Assignments: New window should pop-up to display a drop-down menu with all active contacts. Users with appropriate permissions will be able to select the contacts from and to which the email alerts assignments should be replaced.



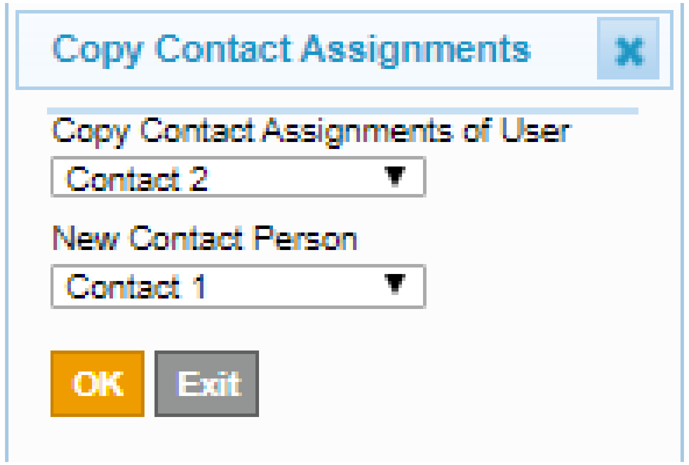
Contact management

- Copy Contact Assignments: Click ‘Copy Contact Assignments’



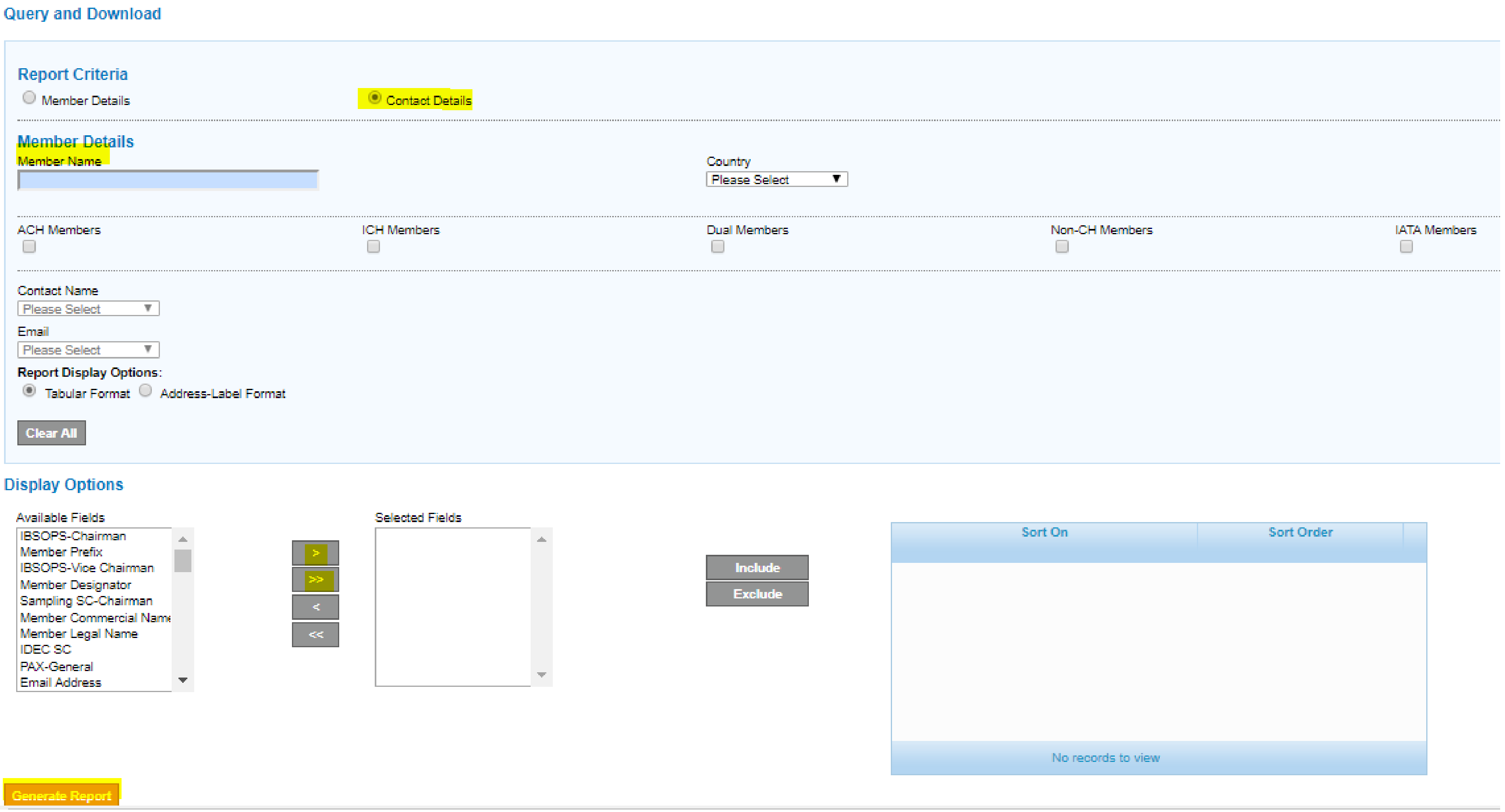
Contact management

- Copy Contact Assignments: New window should pop-up to display a drop-down menu with all active contacts. Users with appropriate permissions will be able to select the contacts from and to which the email alerts assignments should be copied.



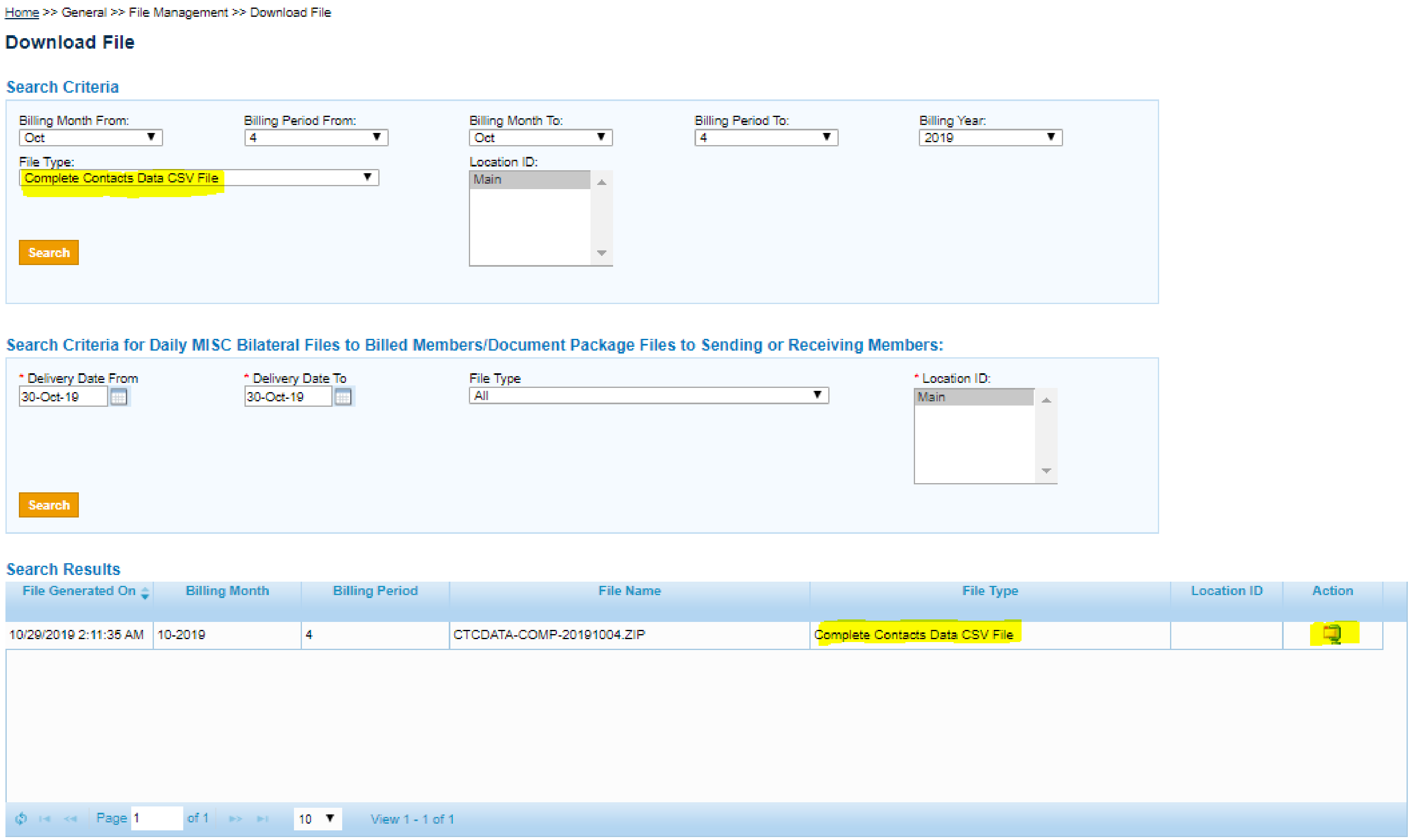
Contact management

- Member / Contact Report: Reports >> Member/Contact Report
- Generates report with a specific or all SIS members' contacts for the desired search criteria.



Contact management

- Complete Contacts Data CSV File: General >> File Management >> Download File – File Type: 'Complete Contacts Data CSV File'.
- Automated output file generated for all members at the end of each billing period that provides the most updated list of SIS member contacts.



Poll Question # 1

Respond to the poll if the statement below is TRUE or FALSE.

"It is possible to generate a report in SIS with a specific or all SIS members' contacts."

A = TRUE

B = FALSE

Changes to user and contact management data retention policy

Changes to user and contact management data retention policy

Changes in the EU GDPR legislation has provisioned new rules with regards to the storage of personal data in SIS.

Effective 8th November 2019, a new process in SIS will automatically:

- **invalidate and delete details of users and their linked contacts that have been deactivated by other users or deactivated by the system due to inactivity;**
- **deactivate the linked contact of the user;**
- **delete all deactivated users and contacts after two (2) years of being in a deactivated status.**

EU GDPR COMPLIANT

Changes to user and contact management data retention policy

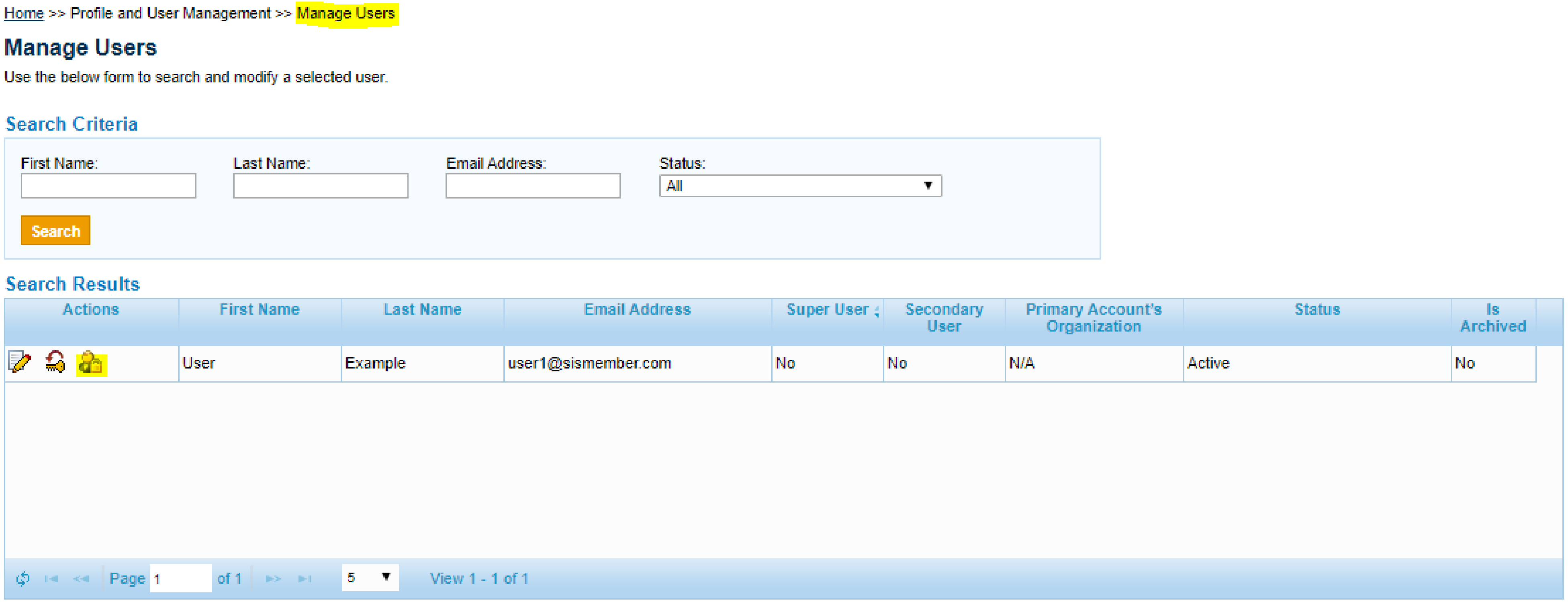
- When users and contacts are deleted, they will no longer show in the following SIS modules:
  - **'Manage Users' –** (*Profile and User Management >> Manage Users*)
  - **'Contacts' –** (*Profile and User Management >> Manage Member Profile*)
  - **'Assign Permission to User' –**
    (*Profile and User Management >> Manage User Permissions >> Assign Permission To User*)
  - **'Manage Location Associations' –**
    (*Profile and User Management >> Manage Location Associations*)
  - Report **'View Profile Changes Report' –** (*Reports >> SIS Users Report*)

Changes to user and contact management data retention policy

- When users and contacts are deleted, they will no longer show in the 'Search Criteria' fields of following SIS screens:
    - **'Manage Invoice'** - applicable for all billing categories; field 'Invoice/Credit Note Owner'
    - **'Billing History and Correspondence'** - applicable for all billing categories; field 'Correspondence Owner'
    - **'Manage Disputes'** - field 'Dispute Owner'

Changes to user and contact management data retention policy

- How to activate / re-activate a user: ‘Manage Users’: Profile and User Management >> Manage Users
- The highlighted ‘Action’ button below will activate or deactivate a user, based on their status at the time.



Changes to user and contact management data retention policy

- Important!:
  - After they are deleted, **users and contact must be created as a new user and/or contact.**
  - It is very important **super-users regularly maintain/update the list of their SIS member account users and contacts** to reflect their most appropriate status.
  - For additional guidance on managing users and contacts, please refer to the following resources published on our website:
    - Chapter 7 of the 'SIS User Guide';
    - Chapter 10 of the 'Integrated Settlement Participation Guide (ISPG)';
    - Module 'Member & User Profile' of the computer-based training.

Poll Question # 2

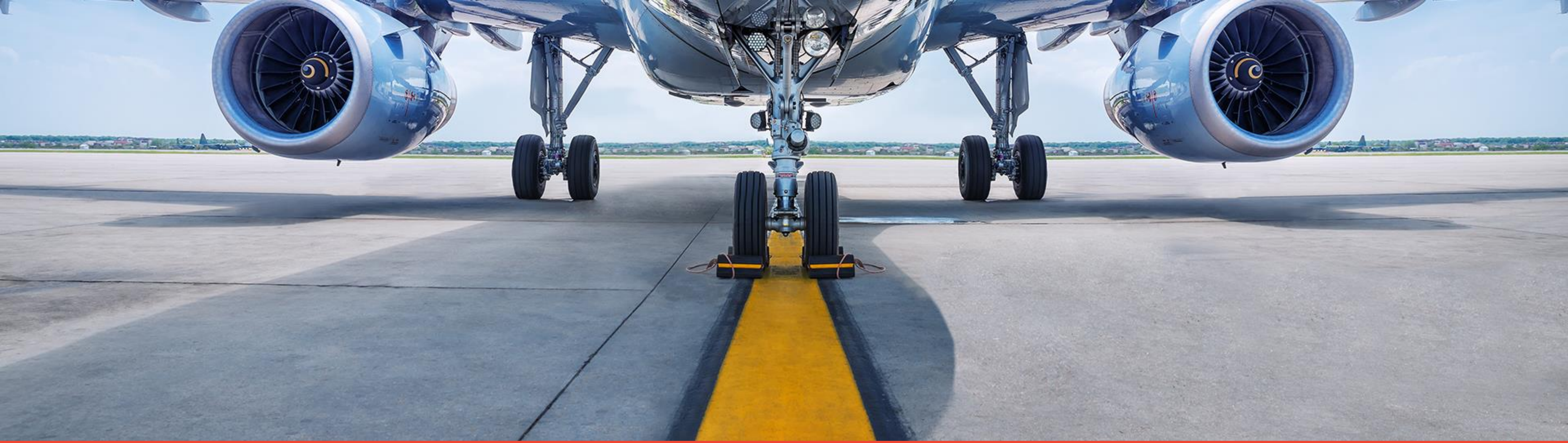
Select the correct response to complete the sentence below.

"After a user and contact is deactivated it takes _______ for the username and contact to delete."

A = Two (2) Years

B = Three (3) Years

C = Five (5) Years



Payment status for 'MISC' invoices and the new data purging process

Payment status for 'MISC' invoices and the new data purging process

Currently, Invoice PDF, Listing and CSV listings files for Bilateral MISC Invoices/Credit Notes are purged after 12 months.

With this change, if last payment status as per the Billing Member of an Invoice/Credit Note is a **status where purging of Invoice PDF and Listing Files should be excluded**, then…

the Invoice PDF and Listing Files of that particular Invoice/Credit Note will **not be purged <u>until</u>**…

the **payment status as per Billing Member is updated** to one of the payment statuses where invoice/credit note will be eligible for purging (*e.g. 'Full Payment Received').*

Payment status for 'MISC' invoices and the new data purging process

- The following are the payment statuses as per the Billing Member that will be excluded from existing purging process.

  - **'Overdue Payment'**
  - **'Partial Payment Accepted'**
  - **'Partial Payment Accepted as per Dispute'**
  - **'Partial Payment Disputed'**
  - **'Partial Payment Outstanding'**
  - **'Status Correction Payment Not Received'**

- All other payment statuses as per the Billing Member will be eligible for purging, as per the existing purging process.

Payment status for 'MISC' invoices and the new data purging process

- Important!
  - This change is applicable to Invoices/Credit Notes **only for Miscellaneous Billing Categories** with SMI 'B' and 'R' and any other **SMI that behaves as Bilateral**, with the exception of SMI 'X'.
  - The invoice PDF and Listing **files which have been purged prior to the deployment of this change will not be available for download.** If the user attempts to download such Invoice PDF/Listing, the system will provide the appropriate error message.

Poll Question # 3

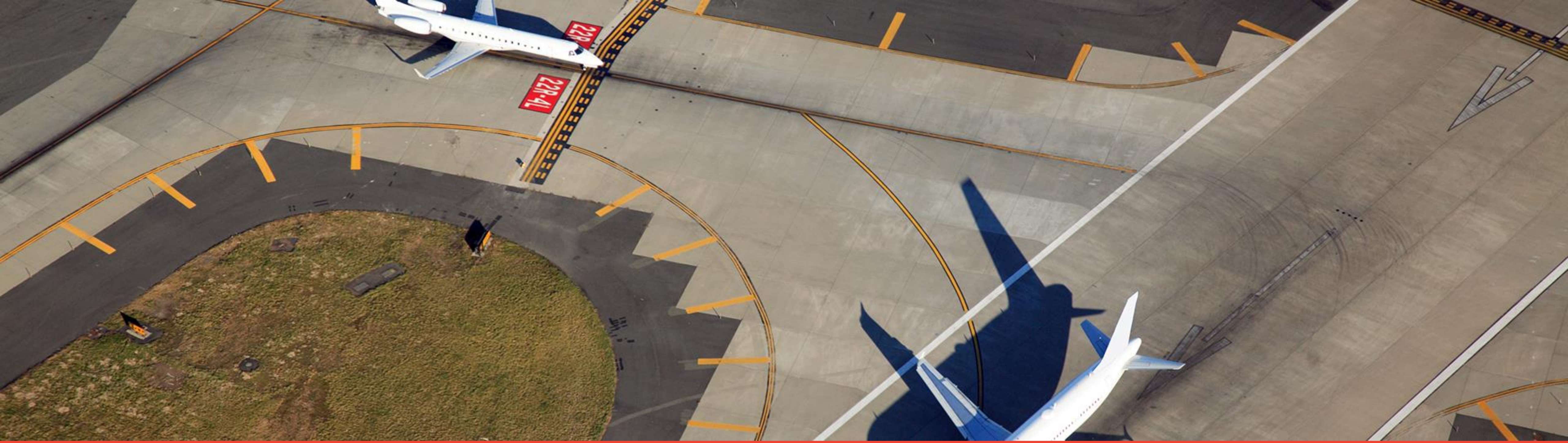
Select the correct response to answer the question below.

How many months does it take for invoices/credit notes to purge, as per the existing process?

A = Six (6) Months

B = Twelve (12) Months

C = Twenty (20) Months

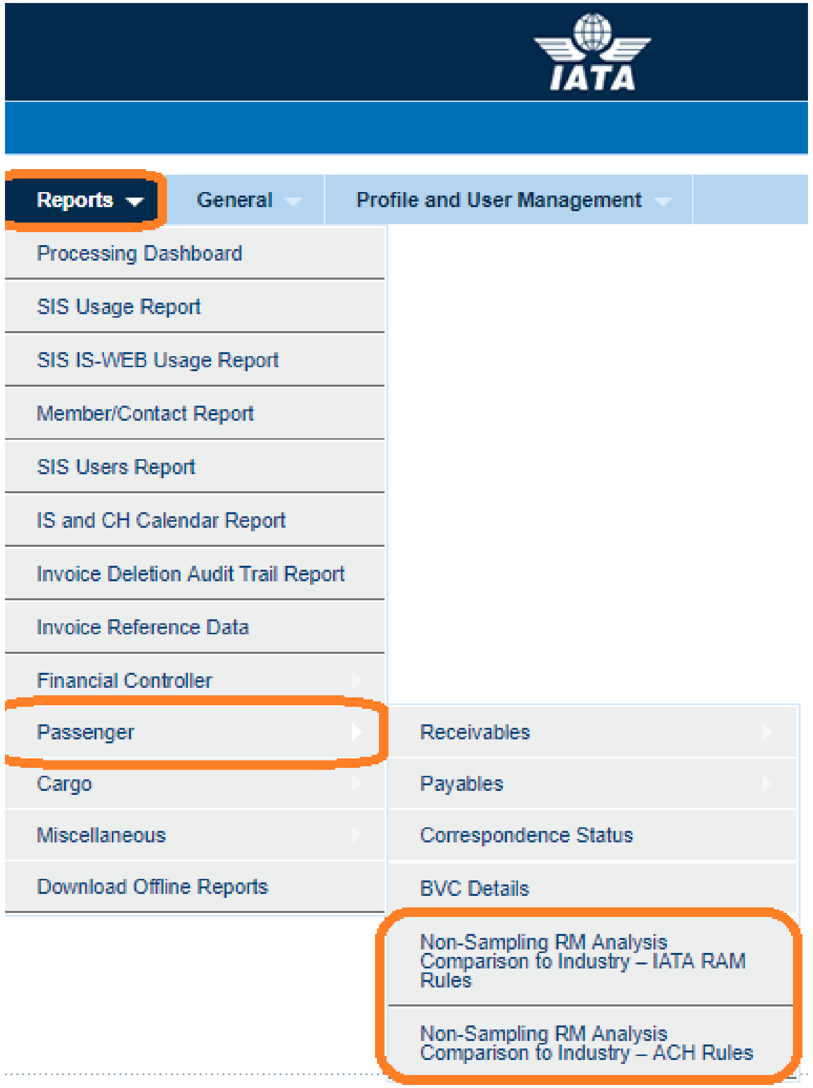


New passenger rejection analysis report

New analysis report for Passenger Rejections

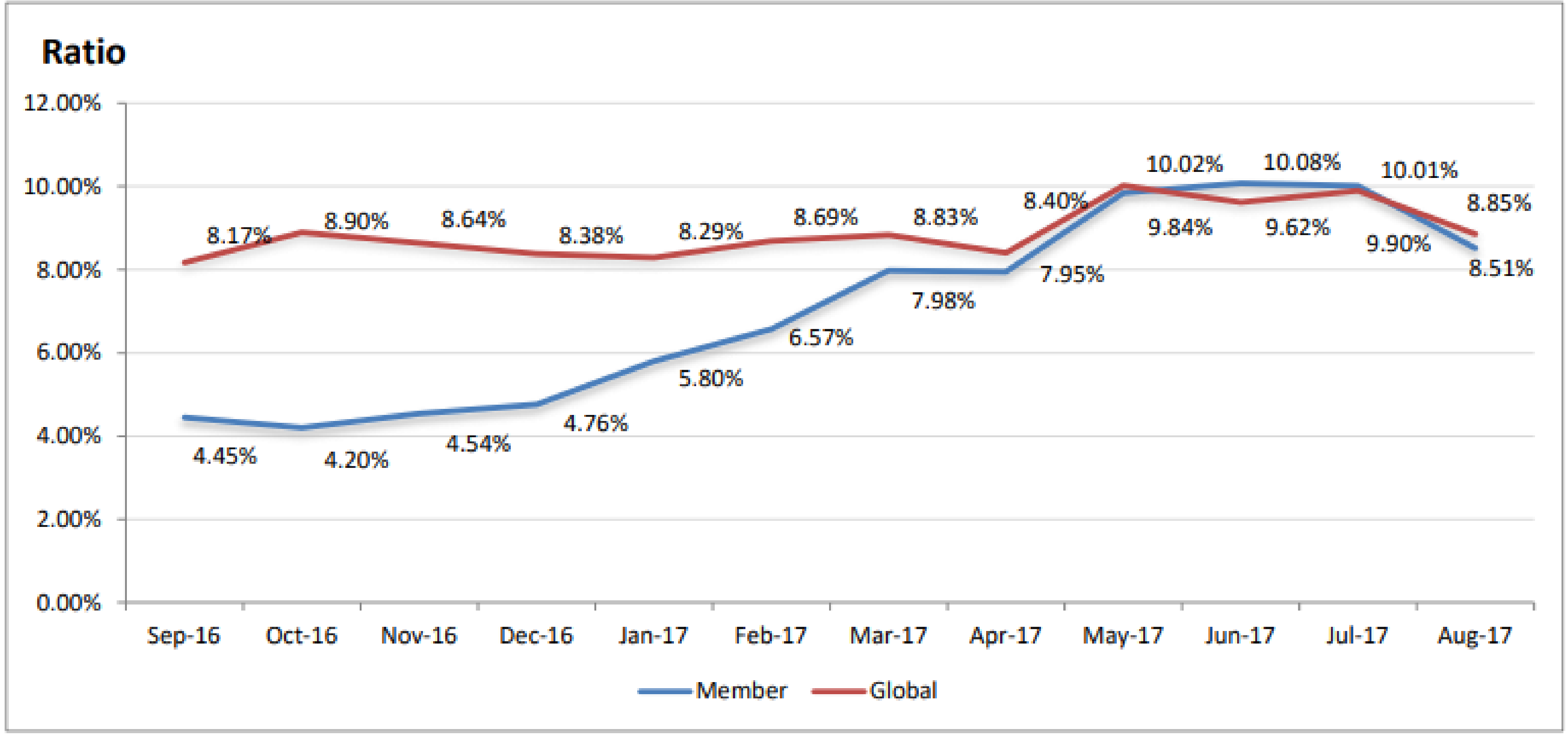
- In May 2019 a new report was introduced for airlines to analyze their incoming and outgoing passenger rejection memos and compare their performance against the global industry trend.
- This report is designed for passenger interline teams to…
  - assess their passenger rejection billing quality against the industry;
  - easily view their passenger rejection billing trends and anomalies;
  - take corrective action to bill correctly the first time to prevent/reduce rejections.
- This new functionality is a result of the Passenger Rejection Reduction initiative.

- Download the Report: Reports >> Passenger >> Non-Sampling RM Analysis Comparison to Industry



Example of report

Ratio of 1st stage rejections raised by member 'XB-ABC' over prime billings billed to member 'XB-ABC'



The chart above illustrates the trend of the estimated percentage of prime billings rejected by member 'XB-ABC'. From the chart we can see that the member 'XB-ABC' percentages are below the industry average but are increasing.

Example of report

Comparison between total count of prime billings received, total 1st stage rejection memos raised, total 2nd stage rejection memos received and total 3rd stage rejection memos raised by member 'XB-ABC'

	Sep'16-Aug'17	Sep'15-Aug'16
Count of Prime Billings billed by member 'XB-ABC'	2,312,387	1,851,029
Count of Stage 1 RM Coupons received by member 'XB-ABC'	300,885	270,981
Ratio of Stage 1 RM Coupons (received) to Prime Billings (raised)	13.01%	14.64
Count of Stage 2 RM Coupons raised by member 'XB-ABC'	64,298	62,663
Ratio of Stage 2 RM Coupons (raised) to Stage 1 RM Coupons (received)	21.37%	23.12
Count of Stage 3 RM Coupons received by member 'XB-ABC'	14,695	11,870
Ratio of Stage 3 RM Coupons (received) to Stage 2 RM Coupons (raised)	22.85%	18.94
Count of coupons disputed in Stage 1 Correspondences initiated by member 'XB-ABC'	2500	2515
Ratio of coupons disputed in Stage 1 Corrs (raised) to Stage 3 RM Coupons (received)	17.01%	21.19

It can be estimated that in Sep'16 - Aug'17 period **10%** of the Prime Billings raised by member 'XB-ABC' were rejected by the other airlines and accepted by member 'XB-ABC' as incorrect.

Example of report

Top 5 airlines raising rejections against member 'XB-ABC' :

Airline	Stage 1 received	Stage 2 raised by Member A	Stage 3 received	Top reason codes (Stage 1)
XB-AAA	26,487	4,528	3,447	1B + 1A
XB-BBB	19,344	3,285	2,119	1B + 1C + 1G
XB-CCC	15,144	699	420	1C
XB-DDD	13,498	7,200	2,998	1B
XB-CCC	10,581	4,360	50	1B

The 1st stage rejections raised by the Top 5 airlines against member 'XB-ABC' represent 54% of all 1st stage rejections received.

Reason Code	Reason Description	1st Stage Rejections Raised Count and Percentage	
1B	Fare Reclaim	105,421	66%
1G	Tax Reclaim	23,716	15%
1C	ISC Reclaim	13,746	9%
1A	Fare/Tax/ISC	10,340	7%
	Other reason codes	5,478	3%
	Total	158,701	100%

The Top 4 reason codes represent **97%** of all 1st stage rejections raised against member 'XB-ABC' during this period.

New analysis report for Passenger Rejections

Benefits realized from this new report:

- Get a snapshot of your passenger rejection memo billing performance against the global industry
- Helps identify possible gaps in your passenger rejection billing handling processes
- Easily identify the top 5 interline partners and reason codes every month for prompt corrective action
- Provides performance summary notes for supervisor/managerial reception
- Quickly view trends and anomalies for prompt corrective action

Poll Question # 4

Respond to the poll if the statement below is TRUE or FALSE.

" This new report is designed for passenger interline teams to assess their passenger rejection billing quality against the industry."

A = TRUE

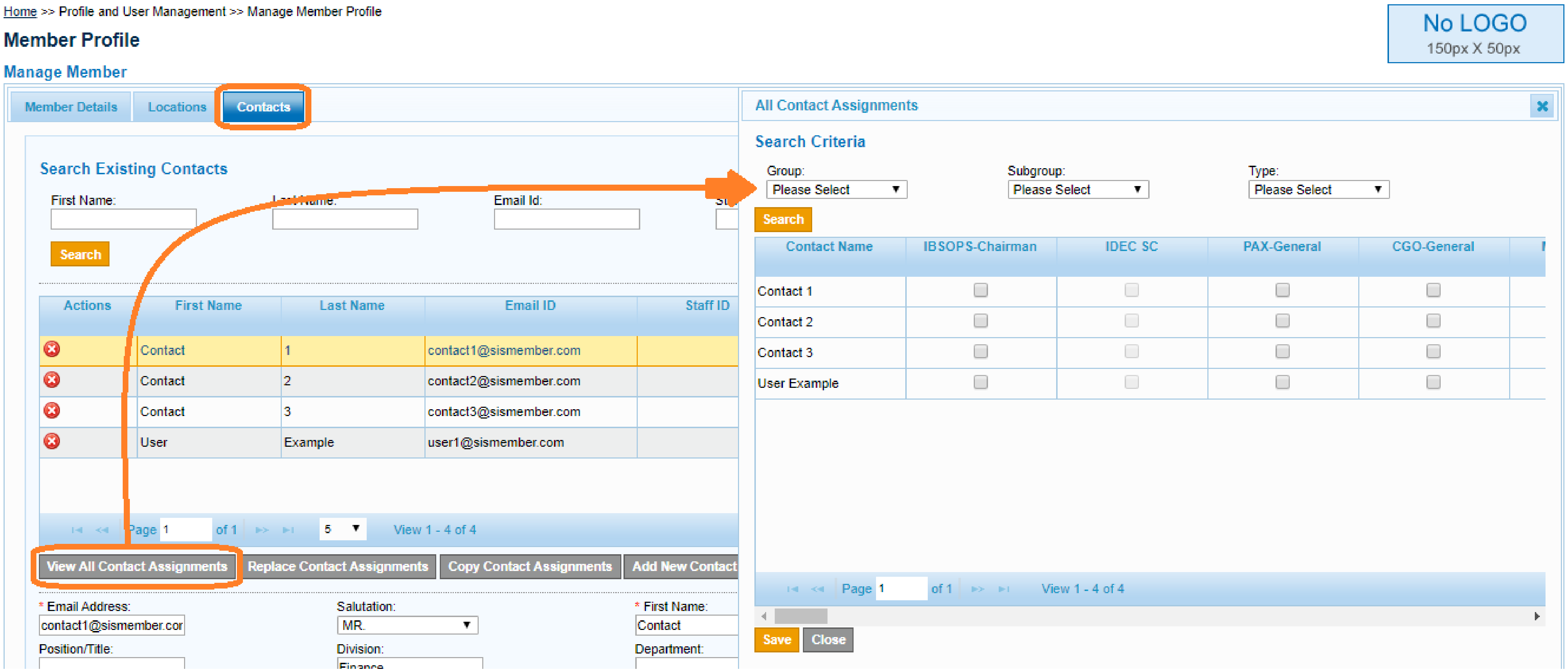
B = FALSE

Correspondence Aging Report and Alerts

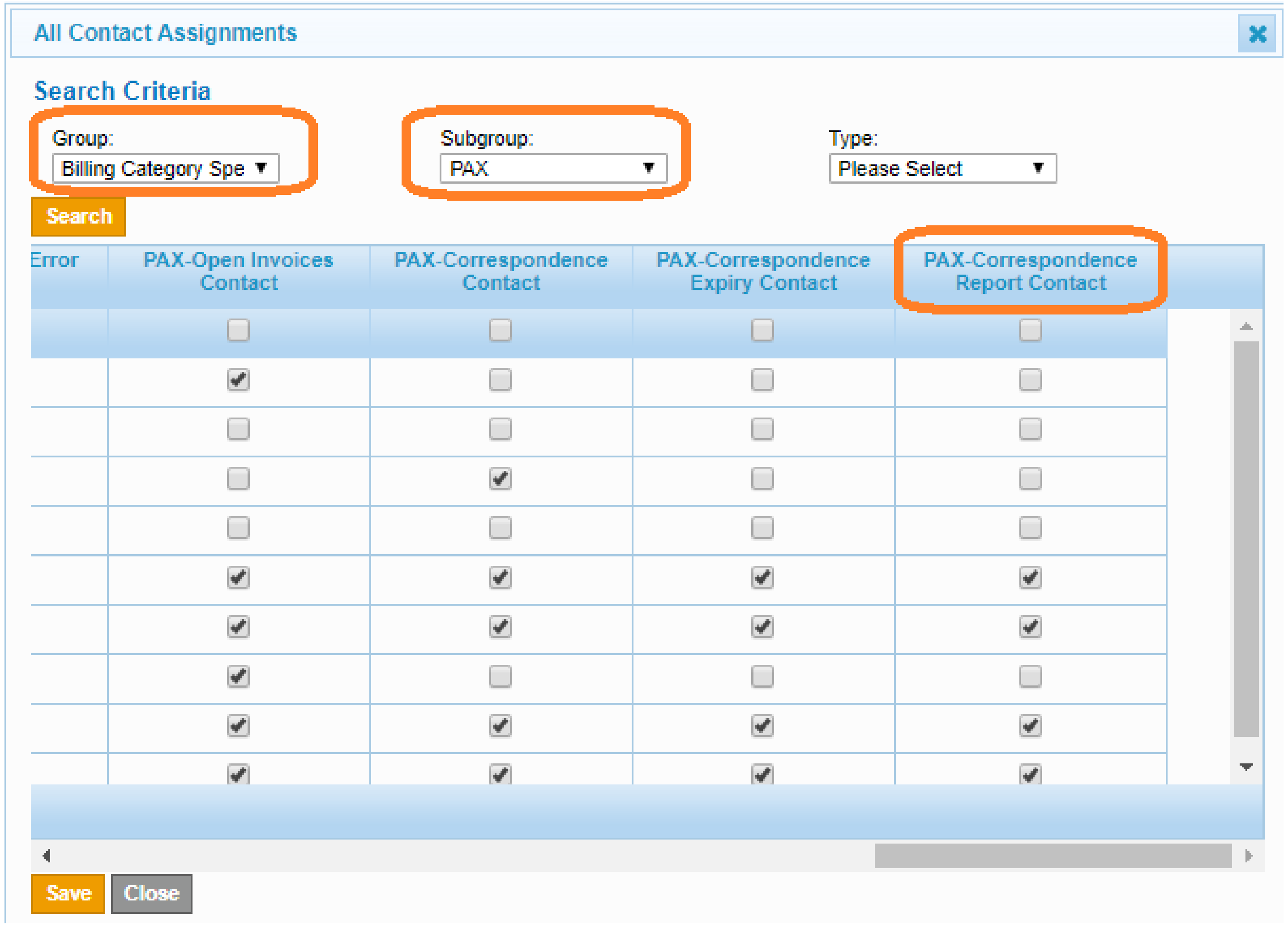
Correspondence Aging Report

- In May 2019, a new correspondence aging report is generated every month and sent to the contacts assigned to receive this email alert as setup in their member profile.
- This new report is applicable to Passenger, Cargo and Miscellaneous billing categories.
- This report is meant to provide a list of correspondences with the following criteria:
  - All Open Correspondences that have **crossed stage 7** (initiated and received)
  - A list of Correspondences initiated, for which **authority has been received** and **no billing memo has been raised**
  - A list of Correspondences initiated, which have **expired due to non-reply** from the other airline and **no billing memo has been raised**

- [Assign Correspondence Report Contact](#) :
  1. 'Contacts' Tab of SIS Module: Profile and User Management >> Manage Member Profile.
  2. View Contact Assignments.



- Assign Correspondence Report Contact (2):
  3. Search by Billing Category and Subgroup ‘PAX’ or ‘CGO’ or ‘MISC’.
  4. Tick the boxes for the relevant contacts under alert titled ‘**Correspondence Report Contact**’



Example Report

Dear SIS Member,
Please find below Correspondence Aging Report for Member XB-ABC.

Correspondences initiated by XB-ABC for which authority has been received but billing memos have not been raised:

Corr. Initiating Member	Corr. From Member	Corr. To Member	Corr. Reference No.	Corr. Stage	Corr. Status	Corr. Sub Status	Corr. Date	Currency Code	Amount To Be Settled	Authority to Bill Flag	Expiry Date
XB-ABC	XB-AAA-Airline2	XB-ABC-Airline1	1250030864	2	Open	Received	06/Jun/2018	USD	275.22	Y (Full)	06/Aug/2018
XB-ABC	XB-AAA-Airline2	XB-ABC-Airline1	1250030867	2	Open	Received	06/Jun/2018	USD	191.06	Y (Full)	06/Aug/2018
XB-ABC	XB-AAA-Airline2	XB-ABC-Airline1	1250030868	2	Open	Received	06/Jun/2018	USD	188.48	Y (Full)	06/Aug/2018

Correspondences initiated by XB-ABC that have expired due to non-reply from the other airline and no billing memos have been raised:

Corr. Initiating Member	Corr. From Member	Corr. To Member	Corr. Reference No.	Corr. Stage	Corr. Status	Corr. Sub Status	Corr. Date	Currency Code	Amount To Be Settled	Authority to Bill Flag	Expiry Date
XB-ABC	XB-ABC-Airline1	XB-BBB-Airline3	1250025564	7	Expired	Responded	01/Jun/2018	USD	296.63	N	01/Aug/2018
XB-ABC	XB-ABC-Airline1	XB-CCC-Airline4	1250025574	7	Expired	Responded	01/Jun/2018	USD	922.22	N	01/Aug/2018
XB-ABC	XB-ABC-Airline1	AI-098-AIR INDIA	1250025948	7	Expired	Responded	08/Jun/2018	USD	1442.16	N	08/Aug/2018

Open Correspondences initiated by XB-ABC that have crossed the 7th Stage:

Corr. Initiating Member	Corr. From Member	Corr. To Member	Corr. Reference No.	Corr. Stage	Corr. Status	Corr. Sub Status	Corr. Date	Currency Code	Amount To Be Settled	Authority to Bill Flag	Expiry Date
XB-ABC	XB-BBB-Airline3	XB-ABC-Airline1	1250025211	8	Open	Received	14/Jun/2018	USD	90.26	Y (Partial)	14/Aug/2018
XB-ABC	XB-CCC-Airline4	XB-ABC-Airline1	1250025287	8	Open	Received	07/Jun/2018	USD	41.92	Y (Full)	07/Aug/2018

Open Correspondences which are not initiated by XB-ABC that have crossed the 7th stage:

Corr. Initiating Member	Corr. From Member	Corr. To Member	Corr. Reference No.	Corr. Stage	Corr. Status	Corr. Sub Status	Corr. Date	Currency Code	Amount To Be Settled	Authority to Bill Flag	Expiry Date
XB-DDD	XB-ABC-Airline1	XB-DDD-Airline5	750009445	8	Open	Responded	07/Jun/2018	USD	59.29	Y (Partial)	07/Aug/2018

Email Signature:
Regards,
IATA SIS Operations Team

Correspondence Aging Report and Alerts

Benefits realized from this new report:

- Take necessary steps and actions to prevent lengthy aging and expiry of correspondences
- Minimize loss of revenue due to no-response and expired correspondences
- Helps members improve quality of outward and inward billings

Poll Question # 5

Select the correct response to answer the question below.

What is the name of the alert type that can be assigned to contacts to receive the new Correspondence Aging Report?

A = Correspondence Expiry Contact

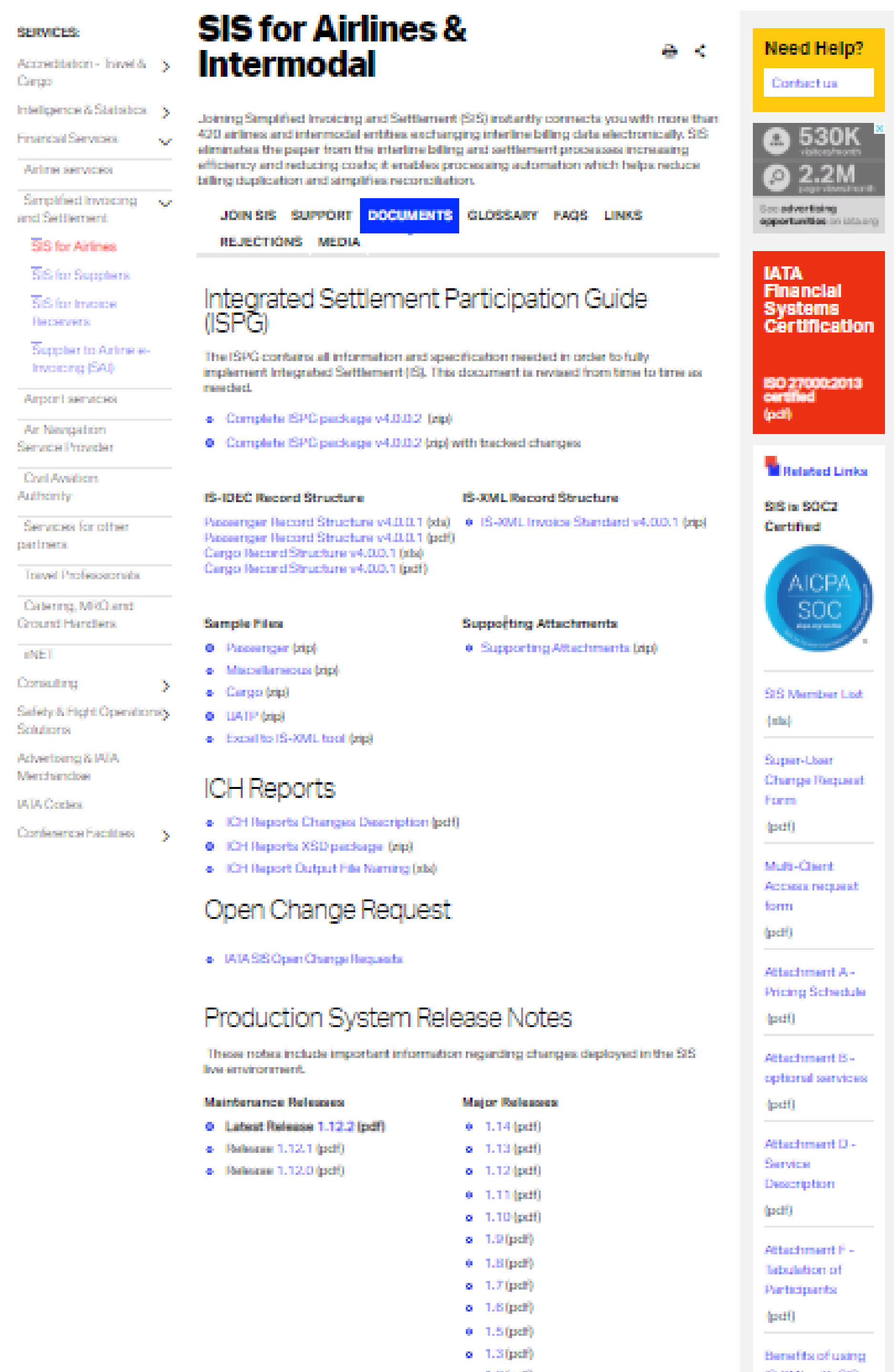
B = Correspondence Contact

C = Correspondence Report Contact

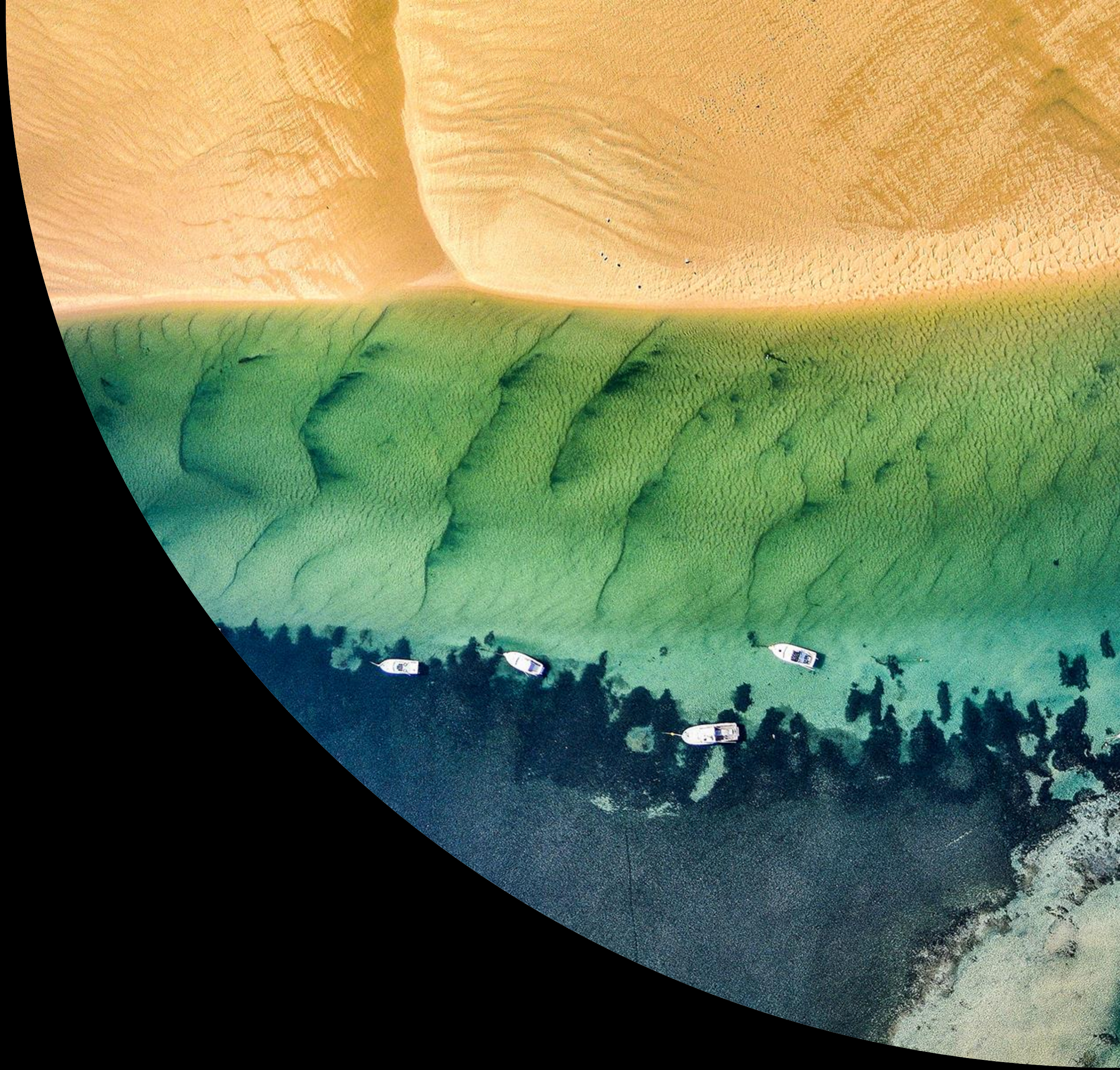
Are you making the most of the new SIS functionalities?

Learn more about **all** SIS functionalities

1. www.iata.org/SIS
2. 'SIS For Airlines'
3. 'Documents' tab



Questions
Comments
Feedback



Thank you