

## SIS WEBINAR #04 - 2020 CONTACT & USER MANAGEMENT

**Presenters: Samuel Diano-Brown & Xhonina Osmani** 



# Get ready to actively participate!

Agenda



- SIS Contact Management
  - What is a contact
  - Importance of Having Contacts Correctly Setup in SIS
  - Contact Management & Alerts Assignment
  - Important Email Alerts & What They Mean
    - Informational Contacts
    - Processing Contacts
    - Clearing House Contacts
- SIS User Management
  - Contacts vs. Users
  - Create Users
  - Manage Users
  - User Permissions
    - Working with Permission Templates
  - Location Association for Users & Contacts
- Reports
  - Member Detail Report
  - Contact Detail Report
  - Complete Contacts Data CSV File
  - > SIS Users Report

## IATA Legal Reminders

! Participants are reminded that live streaming of this webinar by participants to parties not in attendance is not permitted, except as indicated by and with the express permission and knowledge of IATA.

! Unauthorized recording of the meeting is also prohibited.

! IATA will record the webinar and share the link afterwards to the members of this group.



## SIS Contact Management



## What is a SIS Contact?

SIS Contacts are email IDs configured in the system to receive important notifications related to SIS and ICH processes, such as the failure of a file submitted or the ICH Advice Day, or they can be configured for informational purposes, such as your PAX Interline Manager or your CGO Head of Department, so your business partners can get in touch easily.





### Contacts vs Users

- A User can be a contact as well, but a contact does not need to be a user;
- Users can login to the platform while contacts can only interact with the system by receiving email notifications;
- If a User is also a Contact with the same email address, then the two are automatically linked:
  - Once linked, all changes made to the user will be reflected on the contact
  - If the user is deactivated, the contact is also deactivated
  - Contacts previously linked to a user can be reactivated as standalone contacts
- For security purposes, users should have individual access instead of a shared email tracking who did what for audit purposes;
- As a good practice, do not create users with generic email addresses and/or domains (Gmail, Yahoo...etc.);
   make sure the designated contact is reachable!

#### How to make the best use of the SIS Contacts

#### Chapter 10 of the ISPG

- Two categories of contacts available:
  - Processing Contacts
    - Receive alerts for system processing activities;
    - Can be configured by Billing Category, by Location ID, allowing for segregation of duties;
    - These contacts are private, not visible to other SIS participants;

#### Informational Contacts

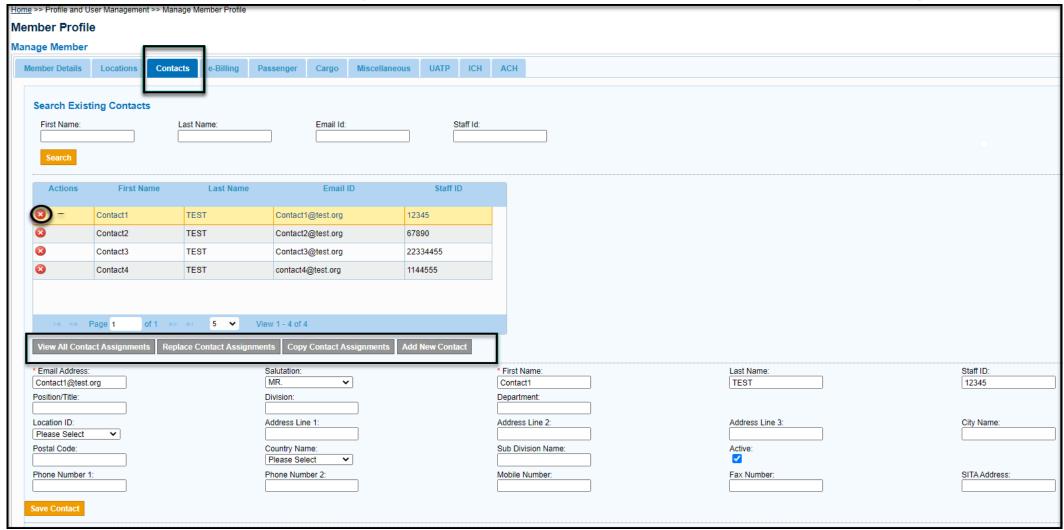
- General contact details for the various departments and activities within your Organization;
- IATA uses these contacts for sharing Industry Bulletins (RA, IBS OPS, SIS, ICH) and Call of Meetings/Conference Calls/Webinars;
- > These contacts are public, available to all other SIS participants.



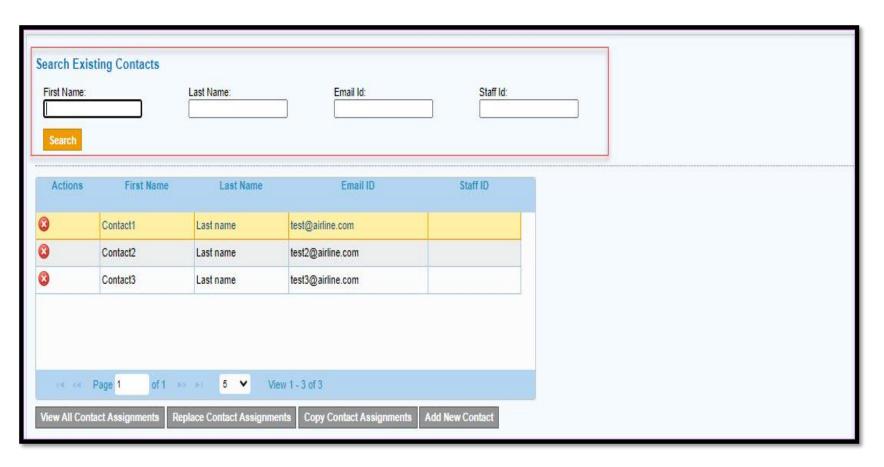
## Importance of Correctly Setup ICH Contacts

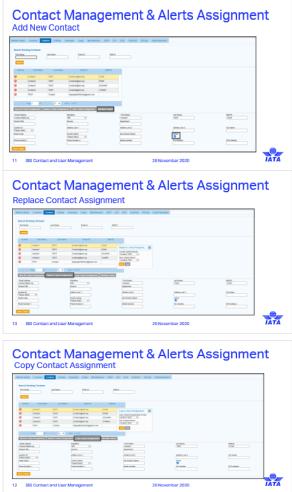
- By maintaining up to date Contacts you can ensure that:
  - Important Clearing House related information and notifications is received on time;
  - The right contact(s) will receive settlement related notifications and avoid possible late payments;
  - Protests are always addressed to the right contacts preventing additional financial adjustments;
  - Important information related to your SIS account and is delivered to the appropriate person, on time!





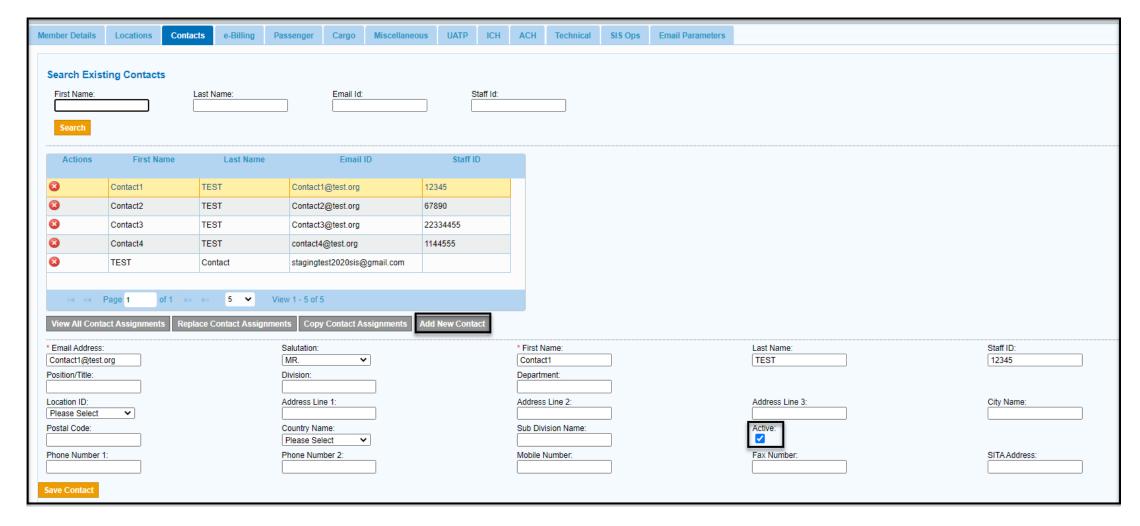






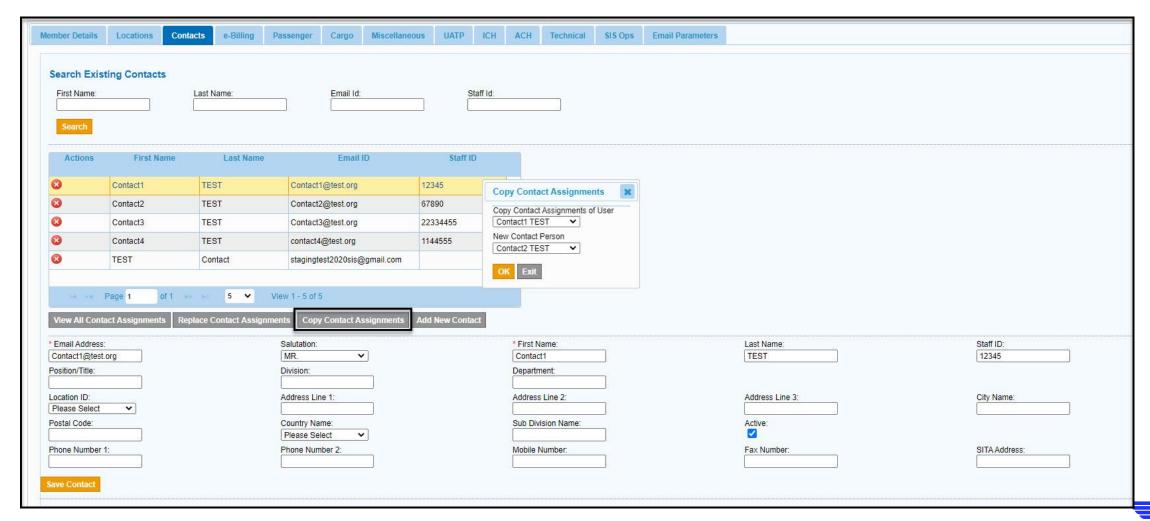


#### **Add New Contact**

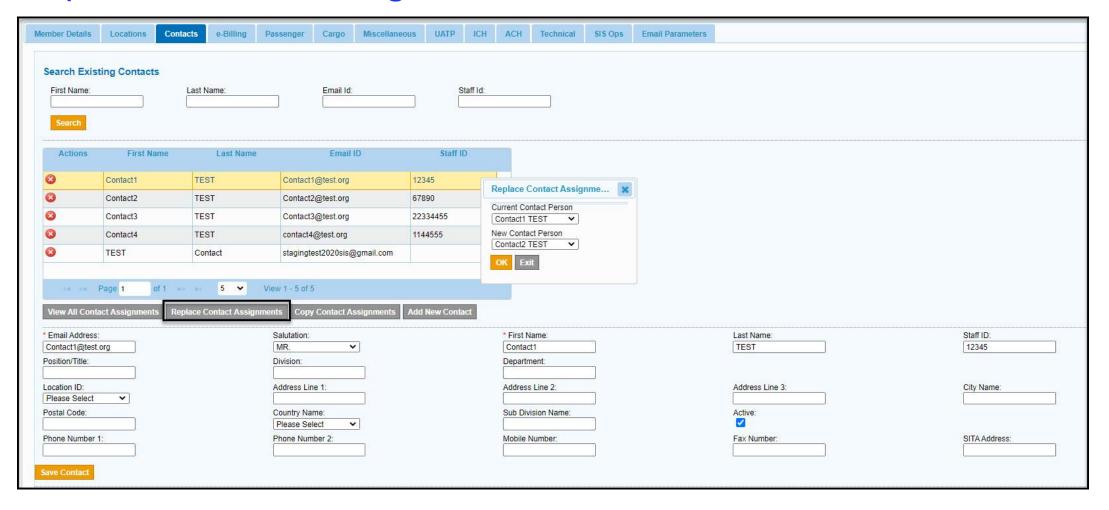




**Copy Contact Assignment** 

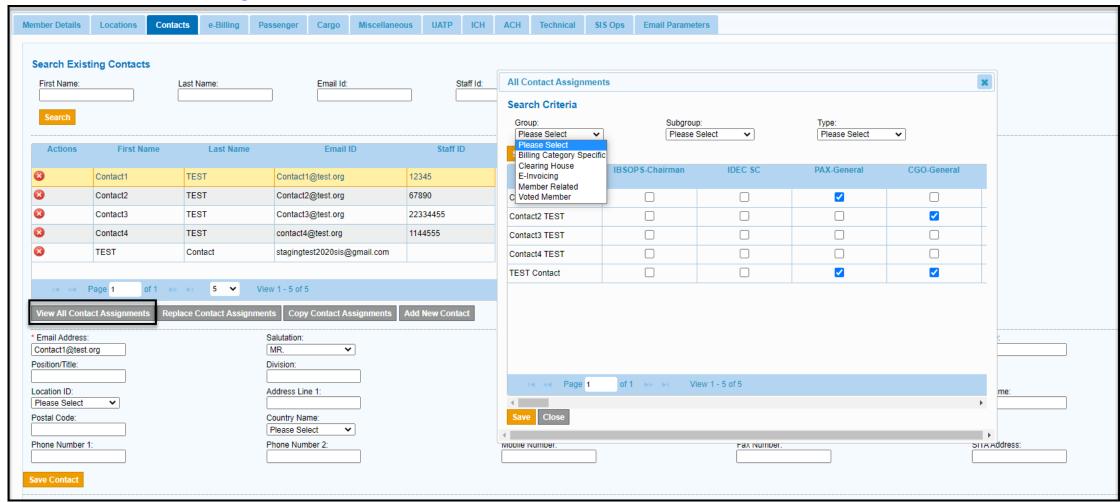


#### Replace Contact Assignment



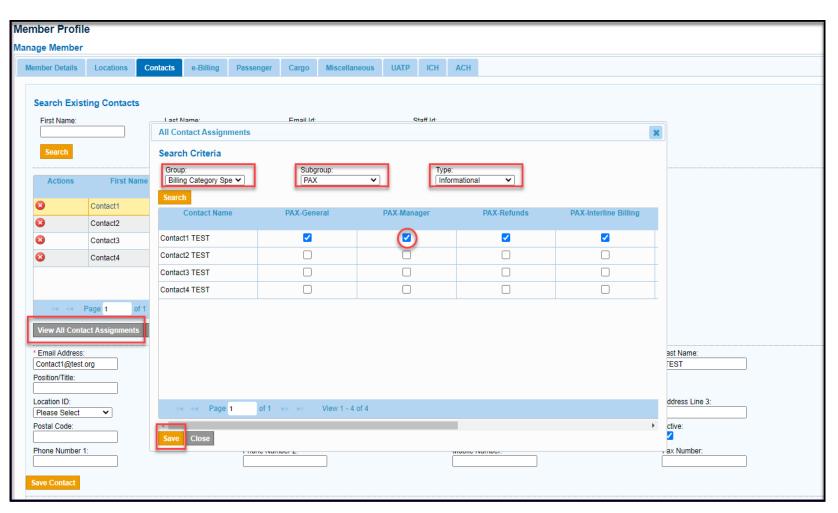


**View Contact Assignment** 



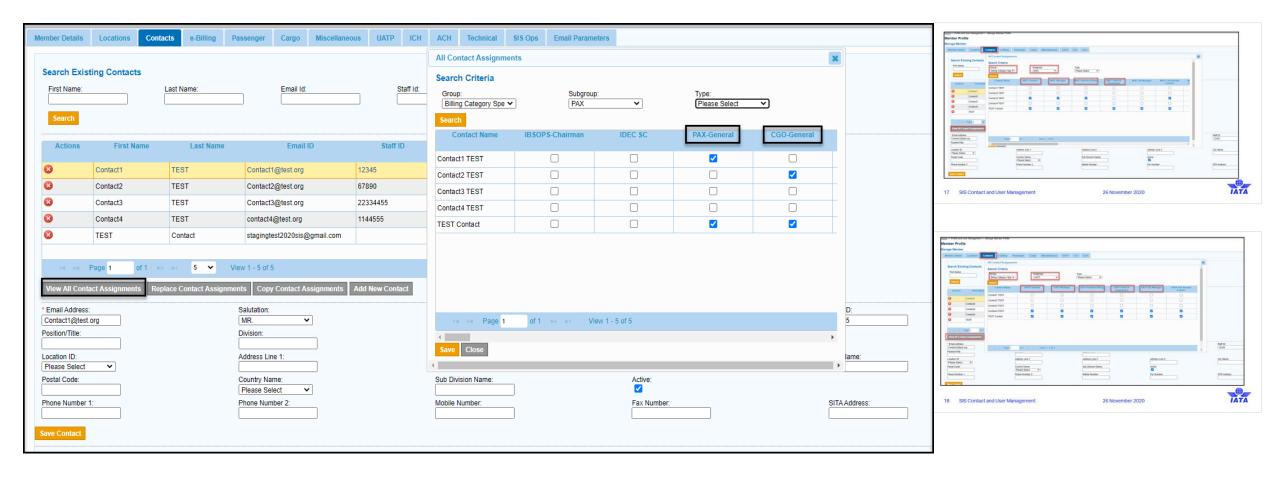
#### Informational Contacts

- General Contact
- Billing Category Manager
- Interline Billing Contact
- Head of Department
- RA Manager

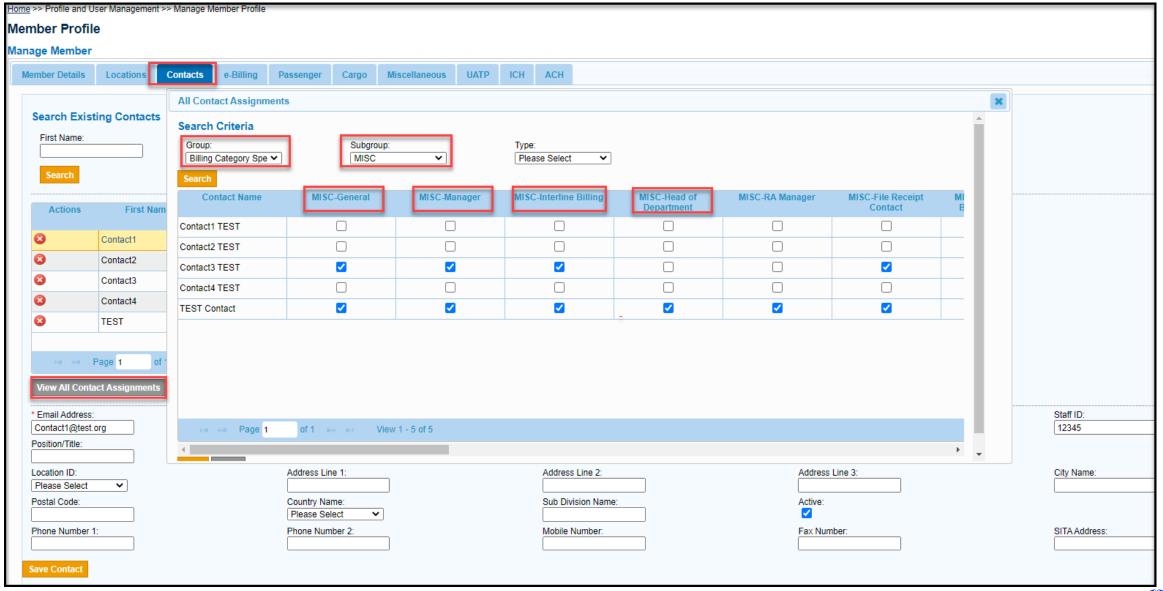




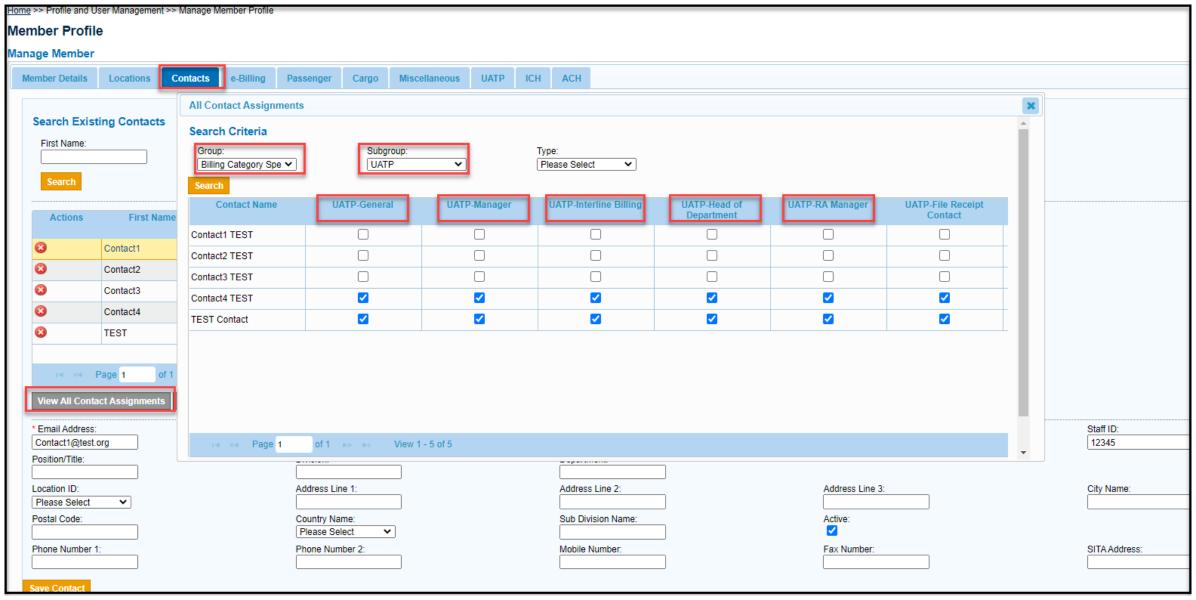
#### Informational Contacts





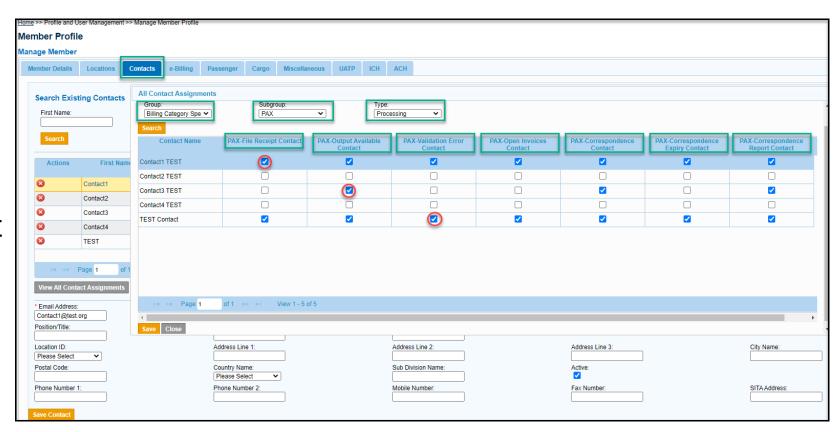








- File Receipt Contact
- Output Available Contact
- Validation Error contact
- Open Invoices contact
- Correspondence contact
- Correspondence Expiry Contact
- Correspondence Report Contact





File Receipt Contact

New File Received - SIS Prod

Dear SIS Member,
The following file was received:
CIDEC-0082020112000005.ZIP
Regards,
IATA SIS Operations Team
Access your SIS account or contact us for support at <a href="https://www.iata.org/cs">www.iata.org/cs</a>



#### Output Available Contact

Dear SIS Member,

The following file has been generated and is available for download via IS-WEB:

OAR-PAX-R-008-20201118.ZIP

Regards,

IATA SIS Operations Team



Validation Error Contact

SIS: Output Files: Files transferred to iiNET - SIS PROD - ValidationSanityCheckReportsIsIdecIsXml

Dear SIS Member,

The following file has been generated and transferred to your iiNET account:

MXMLF-00820200704202008052212345\_VAL.ZIP

Regards,

IATA SIS Operations Team



#### Open Invoices

Dear SIS User,

One or more new invoices are available in your SIS account, please see below a summary:

Billing Member	Invoice/Credit Note Number	Charge Category	Invoice Currency	Invoice Amount
XB-A89-IATA MONTREAL	TESTIT2	Finance	USD	6,167.000

For more detailed information and to view or download the invoices, please log in to your SIS account. For fraud prevention reasons, invoices are not attached to this email and are available online, in your secure account accessible via the IATA Customer Portal.

IATA SIS Operations Team



- PAX Correspondence contact
- PAX Correspondence Expiry Contact

Dear SIS Member,

The time limit for responding to Received Passenger correspondence number 40000090472 is 13-Nov-2020 23:59:59 UTC. No response has been sent from your organization for this correspondence so far. If a response is not sent from your organization by this time limit, it will result in Expiry; and will allow a Debit Due to No Response by the Member who initiated this correspondence.

26 November 2020

Regards,

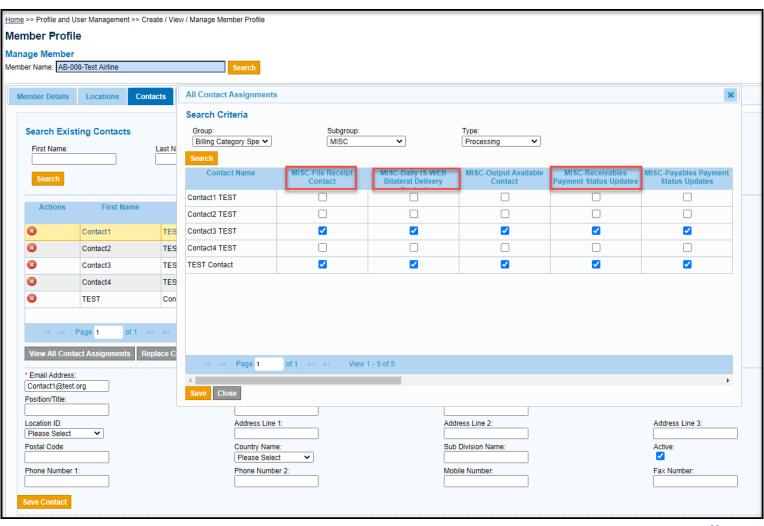
24

IATA SIS Operations Team



#### **Processing Contacts**

- MISC Daily IS-WEB Bilateral Delivery Contact
- MISC Receivables Payment Status Updates Contact
- MISC Payables Payment Status Updates Contact
- MISC Dispute Contact
- MISC Tax Related Contact
- MISC Invoices by Email





MISC Daily IS-WEB Bilateral Delivery Contact/ MISC Invoices by Email

Dear SIS User,

One or more new invoices are available in your SIS account, please see below a summary:

	Billing Member	Invoice/Credit Note Number	Charge Category	Invoice Currency	Invoice Amount
хв	-A89-IATA MONTREAL	0094541861	Service Provider	BRL	1,508.510

For more detailed information and to view or download the invoices, please login to your SIS account. For fraud prevention reasons, invoices are not attached to this email and are available online, in your secure account accessible via the IATA Customer Portal.

IATA SIS Operations Team

Access your SIS account or contact us for support at www.iata.org/cs

#### 尊敬的 SIS 用户:

您的 SIS 账户中有一张或多张新账单,请参阅以下摘要信息:

Billing Member	Invoice/Credit	Charge	Invoice	Invoice
	Note Number	Category	Currency	Amount
XB-A89-IATA MONTREAL	0094541861	Service Provider	BRL	1,508.510

如需详细信息以及查阅下载账单,请登录您的 SIS 帐户。出于防止欺诈的考虑,账单未附在此电子邮件中,您可通过国际航协客户入口 IATA Customer Portal 安全访问您的帐户。



MISC Receivables Payment Status Updates Contact

#### DoNotReply@iata.org

to me ▼

Dear SIS Member.

One or more Payment Status updates were performed by your organization, by the system, or by Billed Members on your Receivables Invoices/Credit Notes in the last 24 hours.

Please refer to the table below for details.

Lin #	Billing Year	Billing Month	Billing Period	Billing Member Code	Billing Member Name	Billed Member Code	Billed Member Name	Invoice/Credit Note Number	Invoice Value	Update Performed on Field	Payment Status	Update Timestamp UTC	Remarks	Currency of Amount Received / Paid	Amount	Total Amount	Received / I	Date of Wire Transfer Receipt / Execution	Reference Number
1	2020	11	1	ΔR3 I	Test Airline	008	Test Airline	TESTINV	USD 24.00	Payment Status as per Billed Member	Received	17-Nov-2020 01:01							
2	2020	11	1	ΔR3 I	Test Airline	008	Test Airline	TESTINV	USD 24.00	Payment Status as per Billing Member	Delivered	17-Nov-2020 01:01							

legards,

IATA SIS Operations Team

Access your SIS account or contact us for support at www.iata.org/cs



Nov 16, 2020, 11:00 PM (14 hours ago)

MISC Dispute Contact

SIS: Dispute - A new dispute received - 1162 - SIS PROD

Dear SIS Member,

A new dispute with a dispute reference number 1162 has been sent by XB-008 to XB-AB3

Please login to IS-WEB to view the details of the dispute.

Regards,

IATA SIS Operations Team



MISC Tax Related Contact

Subject: SIS: India E-Invoicing Tax Submission Status - SIS PROD

Dear SIS Member,

One or more Invoices/Credit Notes are reported for India E-Invoicing. Please refer to the table below for details.

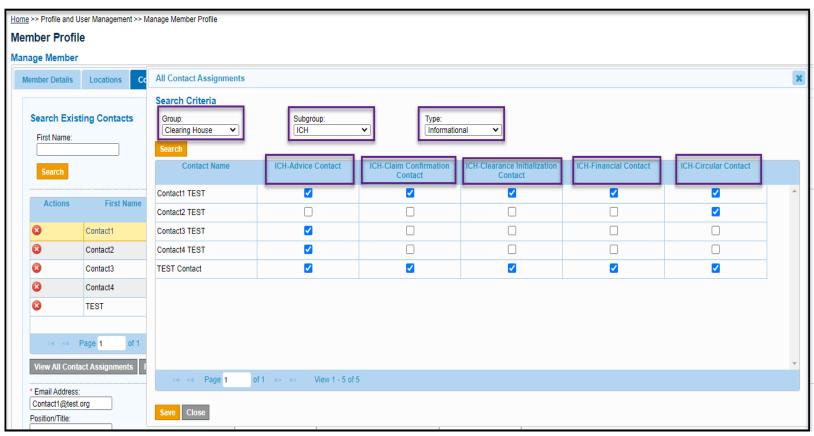
Billing Member	Billed Member	Member Invoice/Credit Note Number Tax Reporting Status IRN		IRN	Error Description
XB-008-Test Airline	(B-008-Test Airline XB-AB3-Airline Test 308528432 Acc		Accepted by IRP	da2f02d7117ee712c3e70c6ad7ecbe5210cb633855bbd39e42d20eec78cfe124	
XB-008- Test Airline	008- Test Airline XB-AB3-Airline Test 308528431		Accepted by IRP	12a4baf5833ebd85627dc4e01acadffbb39fdec9752784de97d63eacda9d4f34	

Regards,
IATA SIS Operations Team
Access your SIS account or contact us for support at <a href="https://www.iata.org/cs">www.iata.org/cs</a>



## Clearing House contacts

- Advice Contact
- Claim Confirmation Contact
- Clearance Initialization Contact
- Financial Contact
- Circular Contact
- Primary Contact





## **Clearing House contacts**

#### ICH Advice Contact

IATA Clearing House Operations <ichoperations@iata.org>

Company: AB-008 TEST Airline.

Attention to: Interline Team, ICH Advice Message contact

Clearance Period: 04 AUGUST 2020 of Standard

Advice Day: 10 Sep 2020

DUE TO ICH:

USD 135,823

Call Day: 17 Sep 2020

Final Form 3 is now available for download from the ICH.

Protest Deadline: 15 Sep 2020

SIS Billing output generation: 10 Sep 2020, 23:00 EST.

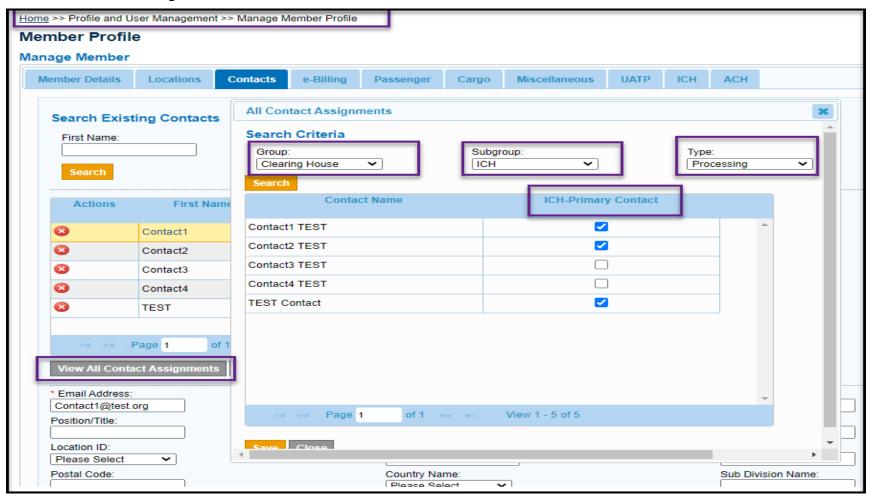
Should you have any queries or require assistance with claims submission please do not

hesitate to contact Help Desk



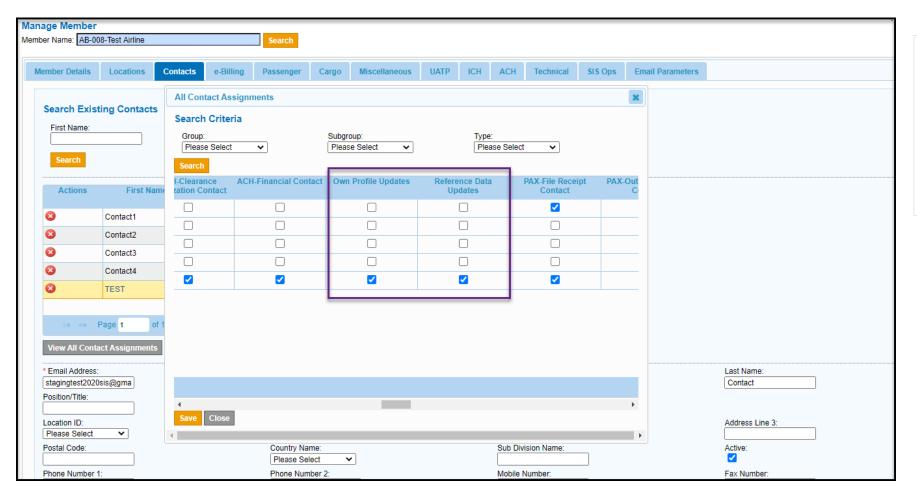
## Clearing House contacts

ICH Primary Contact





#### Get Notified for Member Profile Changes









## Get Notified for Member Profile Changes

#### DoNotReply@iata.org

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Dear SIS Member,

Please find attached details of the changes made to the Member profile of Member 008 - AB - Test Airline on 16-Nov-20.

Kindly take a note of the same.

Regards,

IATA SIS Operations Team



### Get Notified for Member Profile Changes

Group Element	Additional InfoAction Old Value	New Value	Effective DateEffective Period
MiscellaneousOnline Correction Allowed	UpdateNo	Yes	
MiscellaneousBilled Invoices - IS_XML	UpdateNo	Yes	
MiscellaneousBilling Invoices Submitted On Behalf of the Member	UpdateNo	Yes	
MiscellaneousMISC IS-XML Cert Status	UpdateNot Teste	dCertified	
MiscellaneousMISC IS-XML Certified On	Update	11/16/2020 12:00:00 AM	I
MiscellaneousMISC IS-XML Migrated From	Update	1/1/1900 12:00:00 AM	
MiscellaneousAs Billed-Invoice PDF	UpdateNo	Yes	
MiscellaneousAs Billing-Invoice PDF	UpdateNo	Yes	
MiscellaneousDaily IS-XML files for Receivables IS-WEB Invoices	UpdateNo	Yes	
MiscellaneousDaily Delivery in IS-WEB	UpdateNo	Yes	
MiscellaneousDaily Offline Archive Outputs	UpdateNo	Yes	
MiscellaneousDaily IS-XML Files	UpdateNo	Yes	
MiscellaneousFuture Billing Submissions Allowed	UpdateNo	Yes	
MiscellaneousReceive Copy of Location Specific Files at Location Main	UpdateNo	Yes	
MiscellaneousDaily Payment Updates for Receivables Invoices	UpdateNo	Yes	
MiscellaneousDaily Payment Updates for Payables Invoices	UpdateNo	Yes	
Miscellaneous Validation on Acceptable Delay for Payables Bilateral Invoice	es UpdateNo	Yes	
MiscellaneousCSV listing required as a Billing Entity	UpdateNo	Yes	
MiscellaneousCSV listing required as a Billed Entity	UpdateNo	Yes	
MiscellaneousMISC Document Packages	UpdateNo	Yes	
Miscellaneous Allow Resubmission of Failed Invoices	UpdateNo	Yes	
MiscellaneousNumber of Alerts	Update	1	
MiscellaneousDispute Output Files to Billing Member	UpdateNo	Yes	
MiscellaneousDispute Output Document Package	UpdateNo	Yes	
MiscellaneousDispute Review file by iiNET	UpdateNo	Yes	





## User Management



# Super User vs. Normal User

- Super Users are created during the original profile creation or changed by the SIS team based on the SIS Super User Form;
- If the login access for the Member Super User has been disabled for any reason, the Member Super User can contact the SIS Operations Support team via the <u>customer portal</u>;
- This Super User will have the right to create other User accounts and assign permissions. There is
  no limitation on the number of users that can be created for an eligible SIS account. The full
  management of regular users is solely at the responsibility of the super user (or any other user
  with the appropriately assigned permissions);
- The User has the ability to interact with SIS only in regard to the limitations set by their assigned permissions.

# Super User

- Only one Super User allowed per account
- Other users can have the same permission set
- The Super User is the main point of contact used by the IATA SIS Ops Team

#### **Change Super User**

- The <u>form</u> can be found on the SIS website (www.iata.org/sis)
- Complete the SIS Super User Form
- Make sure all mandatory\* fields are filled in correctly
- Return it to the SIS team via IATA Customer Portal (www.iata.org/cs)



#### SIS Super User Form

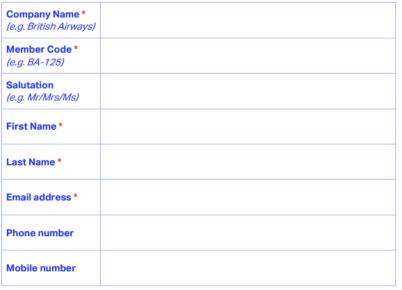
#### Role of the SIS Super User

During the sign-up process each SIS participant must delegate a SIS Super user – the Admin user who will have control over the company's SIS account.

The Super User is granted full access to the platform and is responsible for creating and managing any subsequent SIS users and the company's member profile. Only one Super user is allowed per member however, additional users with the same permission level can be created by the super user.

The Member Super User will have the ability to create as many Users as required, with the appropriate access rights in SIS, to ensure complete coverage for the company.

To change the delegated SIS Super User please fill out the required information:



<sup>\*</sup> Indicates mandatory fields

Please log in to your IATA Customer Portal account to submit the completed form.



# **Create Users**

 Additional Users can be created by the Super User, or other users with the necessary permissions;

 Mandatory information: First Name, Last Name, Email Address;

 Once a User is created, Name, email and Address cannot be changed - please contact us for updates

Surname change (Example: Martial Status)

Email change

 Upon creation users can be assigned to a specific location ID for e-invoicing management at a local level





## **Create Users**

- All users must have a Unique Email address
  - The <u>SIS Multi-Account Access</u> feature, where one email can be associated with various accounts is available as an optional service;
- Once created, a user can not be deleted only achieved.





## **Create Users**

Home >> Profile and User Management >> Create Users

#### Create Users

Use the form below to create new User. All required fields are marked (\*)

Salutation: Mr	*First Name: Samuel		*Last Name: Diano-Brown	*Email Address: uatsistest2020@gmail.com
Position Title:	Staff ID:		Division:	Department:
Analyst	Example1		E-Invoicing	SIS
Telephone 1:	Telephone 2:		Mobile:	Fax:
+123-456-789				
SITA Address:	Secondary User:			
Location ID:  Address 1:		Address 2:		Address 3:
800 Rue du Square-Victoria		710000 2.		Tradition 5.
City Name: Montreal	Postal Code: H4Z 1M1		Country Name:	Subdivision Name: Quebec
Help Text Language:				
Save User Details				





# Manage Users



# Manage Users

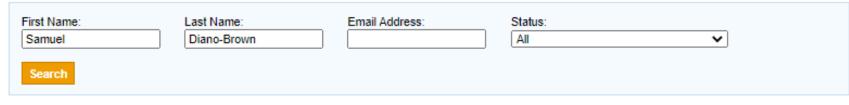
- Can Edit User Profile
- Activate/Deactivate User
- Reset Password
- View Status
  - > Active, Inactive Due to Password Expiry, Deactivated Due to Password Expiry, Deactivated by SIS Ops

Home >> Profile and User Management >> Manage Users

#### Manage Users

Use the below form to search and modify a selected user.

#### Search Criteria

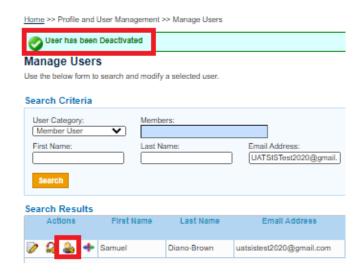


#### Search Results

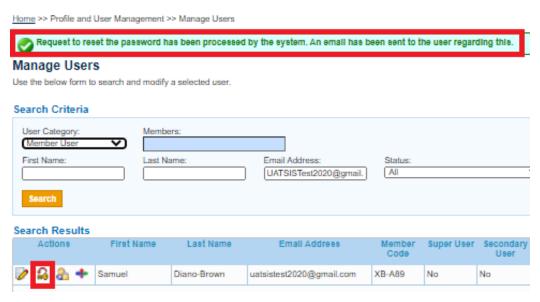
Actions	First Name	Last Name	Email Address	Super User 4	Secondary User	Primary Account's Organization	Status	ls Archived
🤛 🖴 🖀	Samuel	Diano-Brown	uatsistest2020@gmail.com	No	No	N/A	Active	No



# Manage User



Activate/Deactivate users



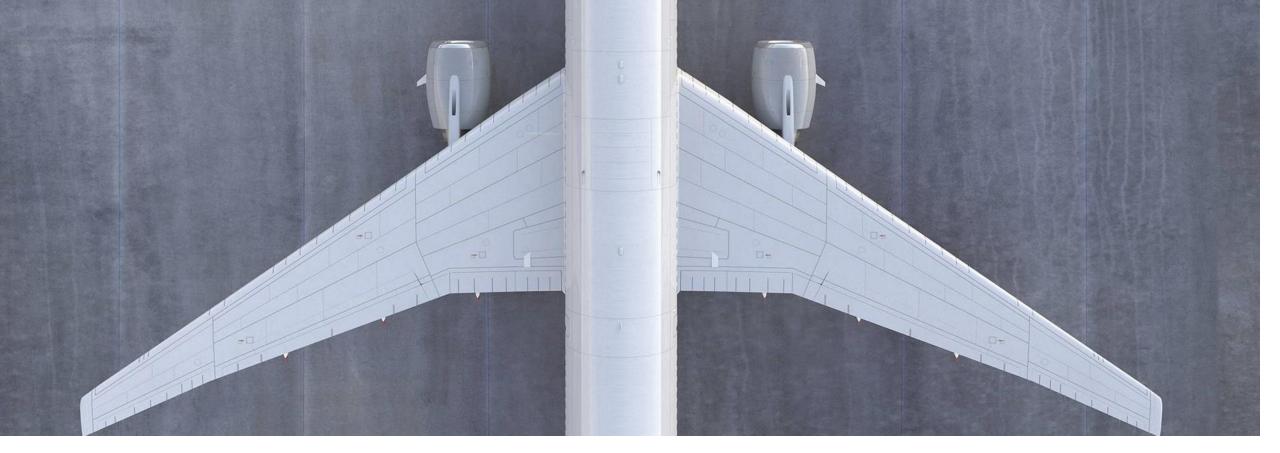
Reset User Password



## **User Status**

- For security reasons, SIS password must be changed every 90 days; users that do not log in for 90 days, will be marked as "Inactive due to Password Expiry";
  - Inactive users can login normally, and will be prompted to reset their password;
- Users that remain inactive for 18 consecutive months will be "Deactivated due to password expiry";
  - Deactivated users must be reactivated by their super user; if the Super User is deactivated, contact the SIS team for assistance;
- Users that remain deactivated for 2 consecutive years will be deleted permanently from the SIS database;
  - Users that have been deleted will have to be created again, if needed.





# **Users Permissions**

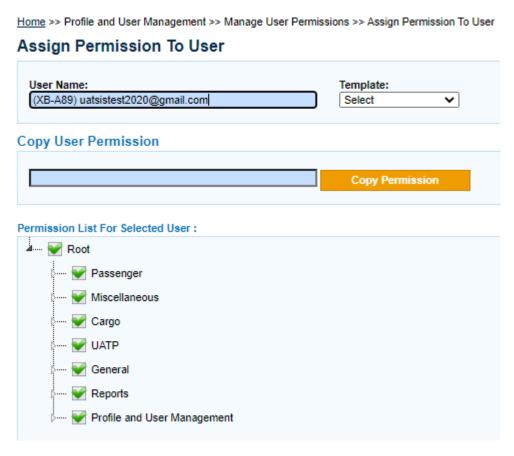


# **User Permissions**

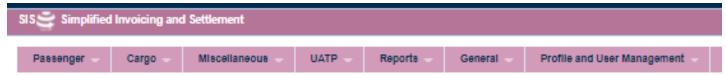
- New and existing users permissions can be edited by any user with the correct permission
- The Super User has the ability to create
   Permission Templates to facilitate permission
   delegation
- Users only have access to SIS modules they have been given permission to







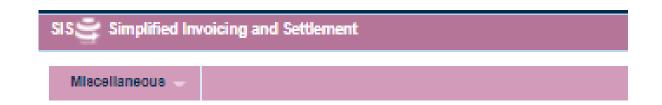
- A User given all Permissions can access all parts of SIS
- When "Root" is checked the User as ALL possible Permissions in SIS
- When a box is checked, the User has ALL possible Permissions within that category (Passenger)
- When a box is filled in, partial permission is given in that category





Home >> Profile and User Management >> Manage User Permissions >> Assign Permission To User **Assign Permission To User** User Name: Template: (XB-A89) uatsistest2020@gmail.com Select ~ Copy User Permission **Copy Permission** Permission List For Selected User: Passenger Miscellaneous Cargo General ..... Profile and User Management

- Can assign unique permissions to unique individuals
- Can help segregation of duties



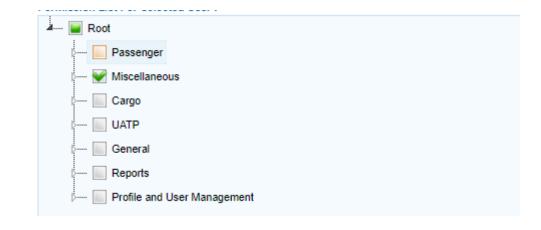


Home >> Profile and User Management >> Manage User Permissions >> Manage Permission Template

#### **Manage Permission Template**

# Search Criteria Template Name: Search Add New Template Clear







Home >> Profile and User Management >> Manage User Permissions >> Assign Permission To User Assign Permission To User User Name: Template: Cargo Receivables 💙 Add Permission Replace Permission Copy User Permission Copy Permission Permission List For Selected User Passenger Miscellaneous Create Invoice Cgo.Rec.Inv.CreateOrEdit Cgo.Rec.Inv.View Cgo.Rec.Inv.Submit Cgo.Rec.Inv.Download Cgo.Rec.CreditNote.CreateOrEdit Cgo.Rec.CreditNote.View

### Add permission:

The permissions included in this template will be added to already existing permissions for this User

## Replace Permission:

The permissions already assigned to this user will be removed and **ONLY** what is in the template will be their new permissions



Cgo.Rec.CreditNote.Download

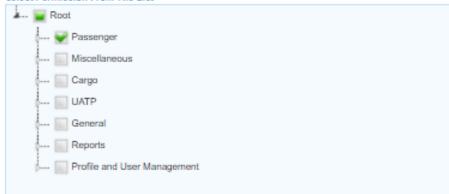
# Permission Templates can be as specific or general as desired

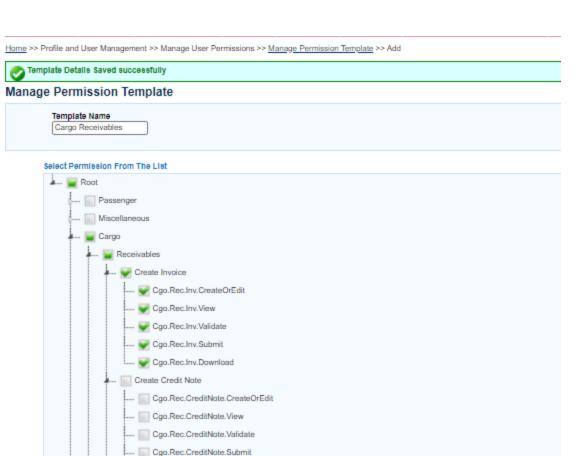
Home >> Profile and User Management >> Manage User Permissions >> Manage Permission Template >> Add

#### Manage Permission Template



#### Select Permission From The List







Cgo.Rec.CreditNote.Download



# **Location Association**

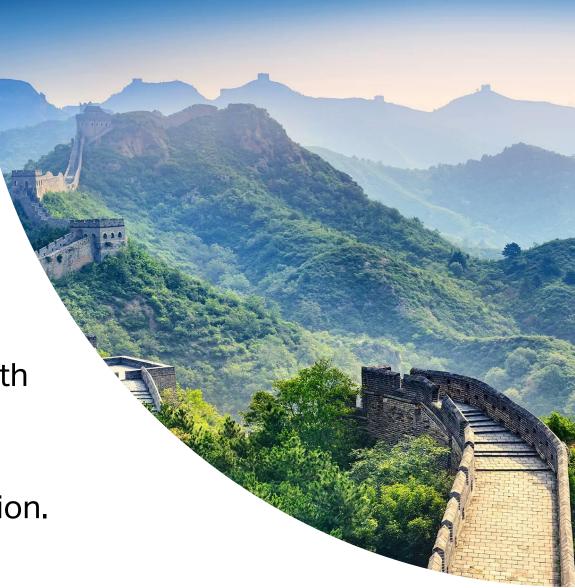


## **Location Association**

 Any User with the correct permission can assign a user to a specific location ID (the locations can be seen in the locations tab under profile and user management)

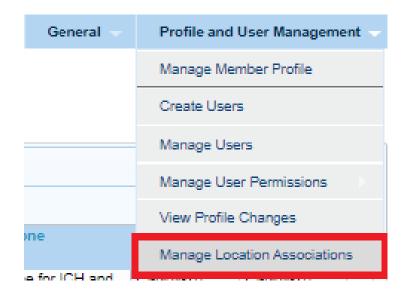
 Once assigned, the User can only interact with invoices billed to/from this location

Ability to Segregate duties in regard to location.

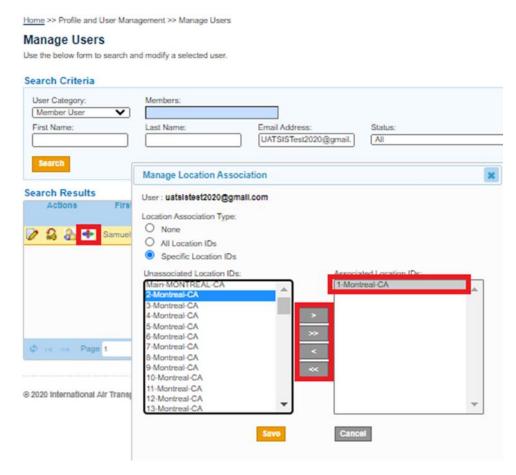




# Manage Location Associations



OR

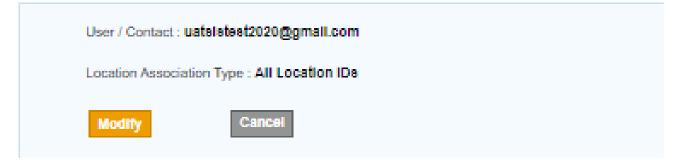




## **Location Associations**

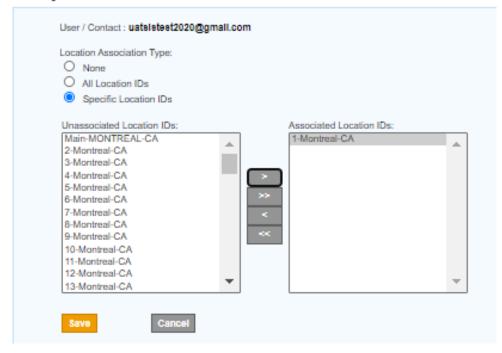
Home >> Profile and User Management >> Manage Location Associations >> View Location Association

#### View Location Association



Home >> Profile and User Management >> Manage Location Associations >> Modify Location Association

#### Modify Location Association







# Reports



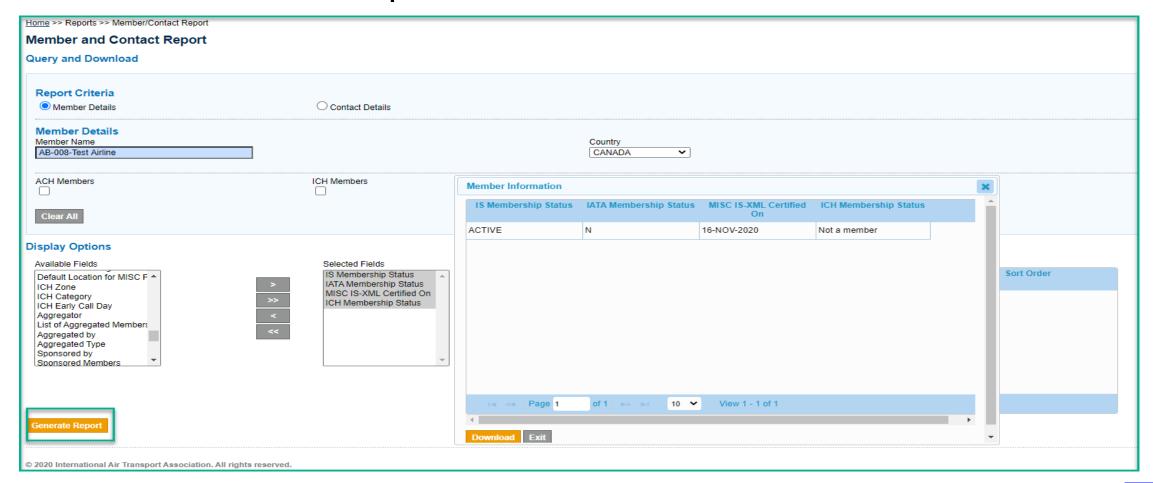
# SIS Reports

- Member Detail Report
- Contact Detail Report
- "Complete contacts data CSV file" (end of each billing period)
- SIS Users Report

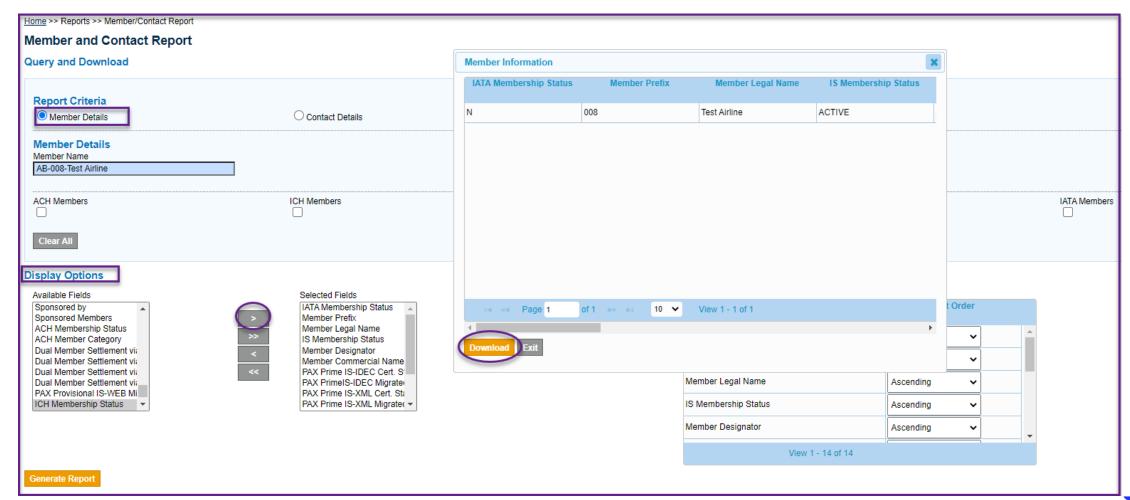




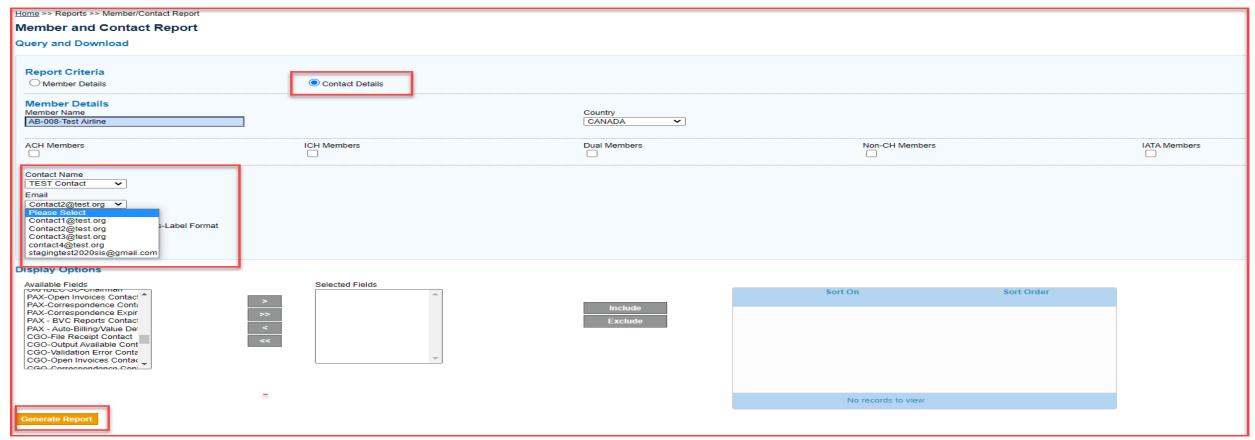
Member Details Report



Member Details Report – Generate Report

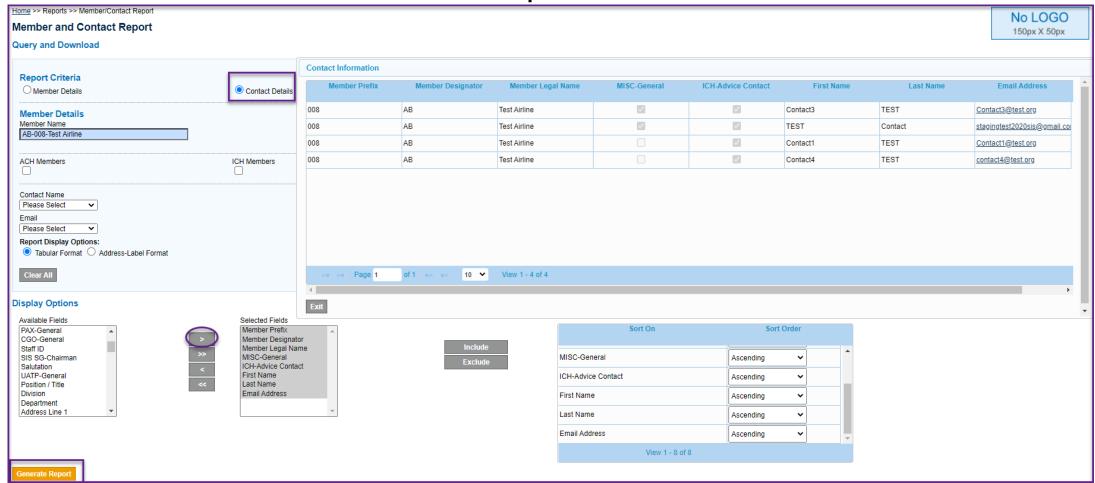


Contact Details Report

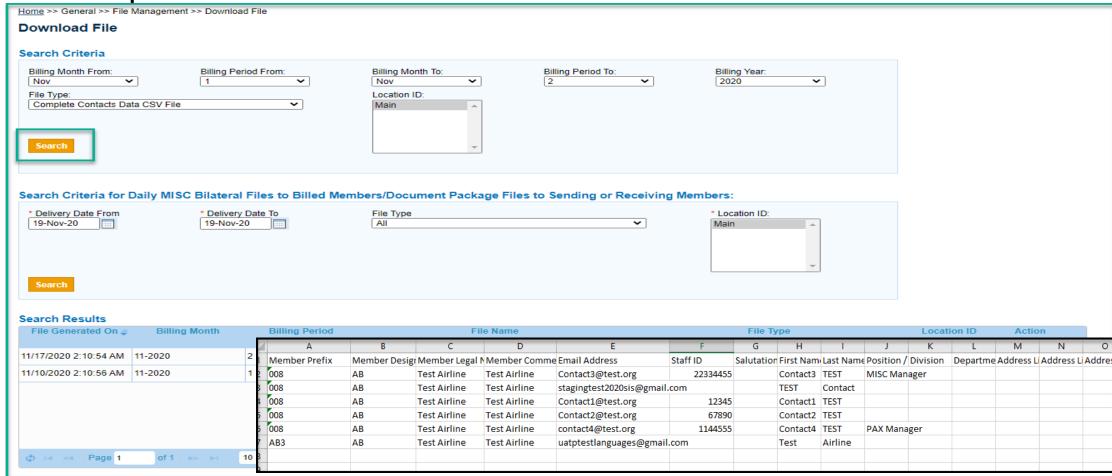




Contacts Details - Generate Report



Complete Contacts Data CSV file



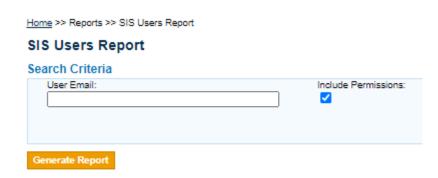
- Any User who has permission can extract the SIS Users Report
- Once Generated an excel file will be emailed to the requester
- Report Contains User Information for All registered Users in the profile
- Information Includes: Users Account Status, Archived, User Type, Primary User, Primary Account, Secondary Account, Location Association, Linked Contact, Last Login Date
- Possibility to see permissions







- Report can be generated either for one or all users associated with a SIS member profile
- Generated Via Email





Dear SIS Member,

The report requested by you has been generated and is now available for download.

Report: SIS Users Report

UTC date/time of report request: 17-Nov-2020 19:02

Search criteria provided:

User Email: All, Include Permissions: Yes

Follow the below link to download the file

https://iswebqa.iata.org:443/isweb/Reports/OfflineReports/DownloadReport?downloadId=bb2353b4-8472-a510-e053-51190a0a72be&offlineReportLogId=425f3c67-538e-444a-a537-5c7208fffa37

Regards,
IATA SIS Operations Team
Access your SIS account or contact us for support at <a href="https://www.iata.org/cs">www.iata.org/cs</a>



Members - SIS Users Report	Search Crite	eria: User Email:				
Email Address	User Name	Member Code	Is Active	User Account status	Is Archived	User Type
Example@123REVENUE.COM	Samuel	A89	Υ	Active	N	Normal User

Is Primary User	Primary Account	Secondary Accounts	Location Association	Linked Contact?	Last Log in Date
Υ			All	N	12-Nov-20



# Learn more about all SIS functionalities

- 1. www.iata.org/SIS
- 2. 'SIS For Airlines' or 'SIS For Suppliers'
- 3. 'Documents' Tab

www.iata.org/cs to contact us!

