CROWN TEAM – 01274 726424
CORPORATE TEAM – 03300 082000
SCOTTISH GOVERNMENT TEAM – 01274 760650

SHIRE HOUSE | 2 HUMBOLDT STREET | BRADFORD | BD1 5HQ
www.travelctm.co.uk

Lightning
User Admin

Contents

About this guide

The first version of the Lightning admin guide was created May 2019. It was last updated August 2019. It is designed to show you:

- **How to use the administrator functions on Lightning step-by-step;**
- **How to create spreadsheets to bulk upload account details.**

It is always recommended to use the most up-to-date version of the guide where available, as the system is updated periodically with new features and enhancements. The latest version can always be found at https://travelctm-north.co.uk/index.html.
This guide is available free of charge and we encourage you to use and share it, but please do not make any modifications to the guide without asking us first. Thank you.

Feedback

If you have any questions, comments or suggestions about the guide, or about future releases of Lightning, we would love to hear from you. Please email **North.bsu@travelctm.com.** Thank you.

Using this guide

If you are reading this guide on a computer, you can navigate around by either:

Using the Contents Page – Press the Ctrl key and click on a section.

Pressing your Ctrl key and left-clicking links in the text – these will be underlined and highlighted, for example: **Using this Guide**

Colour-coding of important information is done throughout the guide:

ⓘ	⛯
This indicates an important point, or a tip to help you with your booking.	This indicates a link to an external website with useful information.

Need Further Assistance?

If you are still having difficulty making a booking after reading the guide, you can use the **Feedback Hub** to direct your query to the appropriate department at CTM for further assistance.

After clicking the *Feedback Hub* link from the help page you will see a form. If you have a hotels query for example, select *Hotel* from the drop-down.

Please fill out the form as completely as possible; this will help us process your feedback or complaint more efficiently.

Special characters such as spaces can cause problems when entered in to the telephone field, so please try not to use them.

V2.2b

The nature of your contact

◉ Feedback ○ Complaint

Business Areas ★

Select a Business Area ⌄

First name ★

Enter your first name here

Last name ★

Enter your last name here

Organisation

Type your organisation then select from the list

Supplier

Type your supplier then select from the list

Telephone ★

Enter your telephone number here

Email ★

Enter your email address here

Subject ★

Enter your subject here

Description ★

Enter your description here

Send to CTM (North)

Once you have sent your form you will be given a reference number; keep this in a safe place as you will need if you contact us about the feedback you have submitted.

Reporting Lightning errors

If you encounter any error messages while making bookings, please screenshot the message(s) and send to CTM's **Technical Support team** as soon as possible after their occurrence.

You can take a screenshot by pressing the 'PrtScn' key on your keyboard, then right click and 'paste' this in to an email. If you are using a laptop computer, you may have to press an 'FN' (function) key in addition for this to work.

Alternatively, you can copy and paste the message displayed on screen and include a note on where and when the error message occurred.

Booking requests cannot be guaranteed in absence of any screenshots or supporting information on the problem encountered.

Accounts, Registrations and Deactivation

Account types

There are four account types. Each account type has different features; users may be allowed to only book for themselves or be able to book for up to eight people at a time for example.

Account Types	Features
Traveller	• The most basic account; allows bookers to quickly add user details and avoid having to type information manually. • Doesn't have a log in, so cannot book travel themselves online.
Self-Book	• Able to book travel and accommodation in their name only – booking for colleagues is not allowed. • Able to edit their profile (e.g. name and address).
Self-Book and Others	• Able to book for other users, though they must be one of the travellers (or hotel guests). • Able to edit their profile (e.g. name and address).
Booker	• Can make bookings for any user in the same organisation, even if the booker is not one of the travellers. • Able to edit their profile (e.g. name and address).

You may choose to a have a mixture of different accounts registered at your organisation. For example, you could have a team of bookers who are responsible for making travel arrangements for a group of travellers.

Profile types are not fixed, so you can amend them later should an employee's circumstances change.
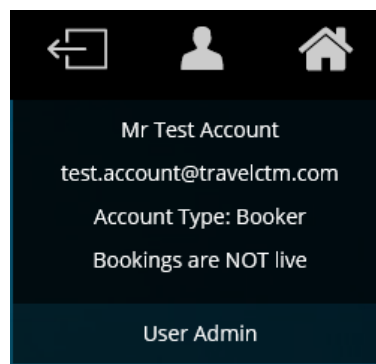
Creating accounts

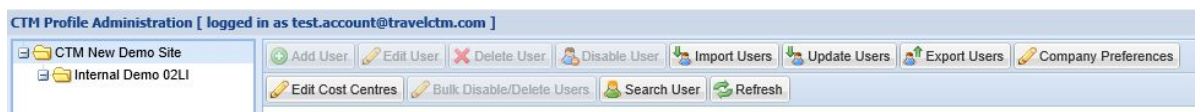As an Administrator, you can create new accounts by either:

- **Adding a single user**
- **Bulk uploading a list of users**

Add a single user

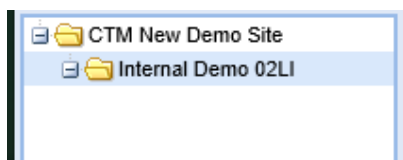To add a single user, first click the *User Admin* link within the avatar icon

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.

Click the folder at office level to see a list of users.

Next, click the **Add User** button to create a new user profile. You will then see a new window, prompting you to enter the user's details.
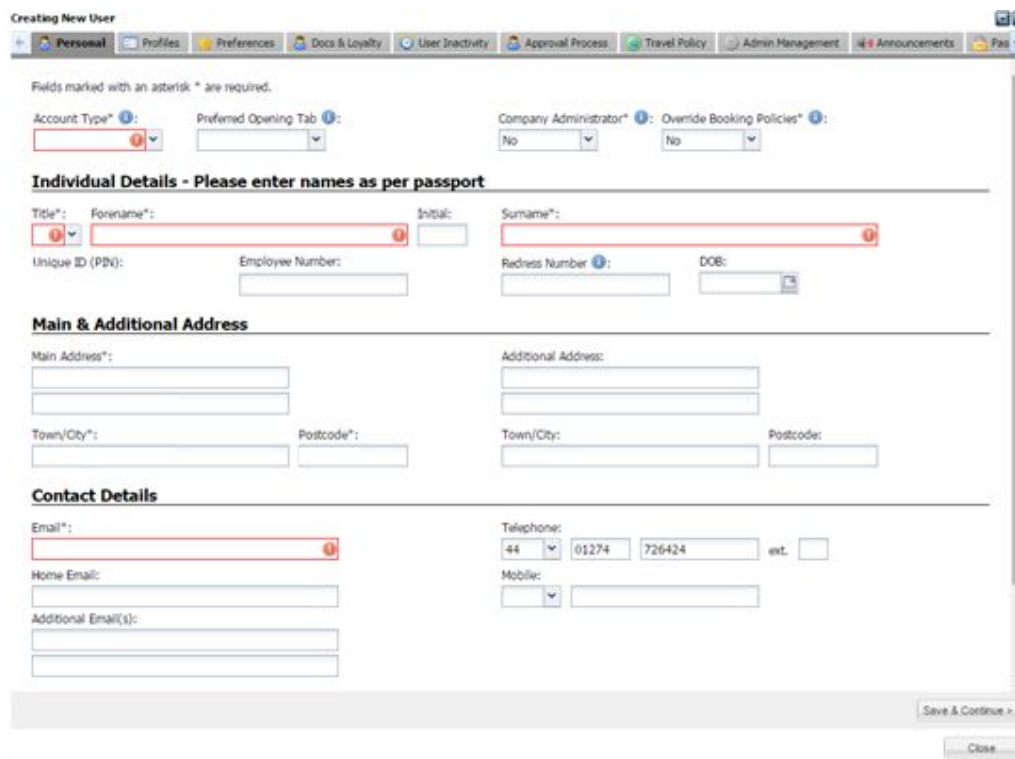

Setting Profile Details

The 'Personal' tab will be open by default.

All mandatory fields which have not yet been completed are displayed with a red line around them.

Lightning will fetch these details when users select 'Add Me' or 'Add Company User' during the booking process.

> **ⓘ**
>
> **Missing 'Personal' details?**
>
> Normal (i.e. non-admin) users will not be able to see anything above the
> 'Individual Details' heading when logged in, as only Administrators are able to modify these
> settings.

In this example, we will create a user with '**Self Book'** status.

Setting an Account Type

You can set the user's access privileges from the *Account Type* drop down menu.
The choice of account type is not permanent; it can be changed again by opening the user's profile
and selecting another from the drop-down menu.
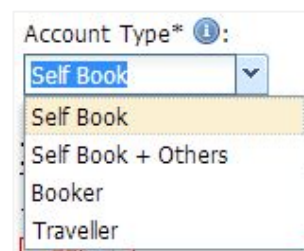
Optional: Set a Preferred Opening Tab

You can set a default tab to open when a user opens the search page, or selects *Start Again* on the
bookings menu.
If the user will perform mostly hotel bookings for example, you can select 'Hotels' from this menu so it
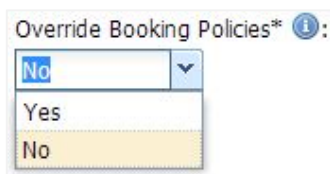is the first search page to open.
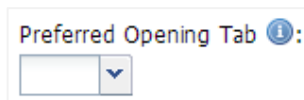
Setting Administrator Status

More than one user with Administrator status can be set for your organisation. If a user is being
created without access to the administrator options, you will need to select '*No*' from the drop-down.
Administrator status is not linked to a user's account type. They can be both a Booker and an
Administrator for example.
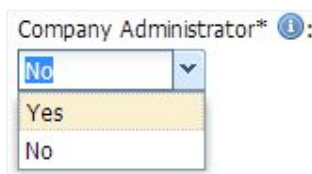
Setting the Booking Policies

With the **Override Booking Policies** drop-down, you can select whether or not the user can book outside your company travel policy.
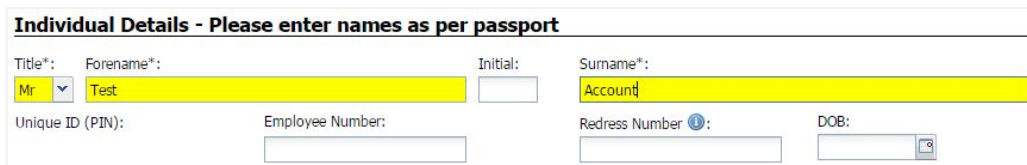

This can be useful in emergency situations where a booking needs to be made regardless of price.

For example, if a natural disaster prevents onward travel, your policy can be temporarily suspended so that affected users can book accommodation at short notice when rates tend to be highest. Selecting '**Yes**' will allow the user to book regardless of the travel policy you have set. The user will also see a message at the top of the Lightning website, notifying them that travel policies are disabled. **(All Travel Policies Disabled)**

Selecting '**No**' will prevent the user making any bookings which fall outside the travel policy (unless you have allowed certain bookings by providing a reason).

Entering User Details

Under the '**Individual Details**' heading, you will need to enter the name and title of the user.

Details which have been changed will be highlighted in yellow until they are saved.

When creating users, it is **recommended that the name on the system matches the one on their** passport. This will prevent any delays or additional cost to the user should they book a flight.

ⓘ

Selecting a title

The user's title must be selected from the drop-down menu. Including any punctuation in this field will generate error messages when booking.

A **redress number** is optional; this is for flights only. If you do not have a redress number, you do not need to enter anything here.

The **date of birth** (DOB) is also optional, but you will be required to supply it for flight and car hire bookings.

Specifying an address

The user's **main address needs to be specified at the minimum**. Depending on your company set up, you may see these fields already filled in.

Main & Additional Address

Main Address*:		Additional Address:	
CTM North			
Shire House, Humboldt Street			
Town/City*:	Postcode*:	Town/City:	Postcode:
Bradford	BD1 5HQ		

ⓘ

Check the address details

Please ensure that the address is up-to-date, if the user selects post as their delivery method, the tickets will be posted to their main address by default.

Entering Contact details

The email address will function as the username to log in to Lightning, as email confirmations sent after bookings and password reset emails are sent to this address, it is generally advised to use a work email address.

Contact Details

Email*:

test.account@travelctm.com

Home Email:

Additional Email(s):

eTicket Email Address:

Details which have been changed will be highlighted in yellow until they are saved.

> ⓘ
>
> **Entering email addresses**
>
> When entering the user's email address, it must match their work email address exactly and typed in lowercase. Typing an incorrect email address will prevent the user from receiving password reset emails and confirmations.

A telephone number must also be specified, and although mobile numbers and emergency contact details are optional, **CTM strongly recommend a mobile phone number is provided so we can contact the traveller if a hotel or airline contact us, and we need to alert them to a change of itinerary or a problem at a hotel**. Telephone numbers will be ONLY be used for travel matters and not for any marketing activity.

Next, you will need to activate the user's profiles. Press *Save & Continue* at the bottom right to proceed to the Profiles tab.

Activating Booking Profiles

By default, a user will not have any booking profiles enabled.

A profile is required to be activated before performing each type of booking, for example if the user is creating hotel bookings, they will need to have a hotels profile enabled.

Profiles are also required if someone is having a booking made on their behalf, otherwise an error will appear when booking.

You can choose to activate all profiles at once using the 'Activate All Booking Profiles' button or individually.

Once you have chosen to enable a profile, the window will appear grey for a few seconds and 'Creating profile...' will appear.

When the creation process is complete, you will receive an acknowledgement on screen that the profile creation was successful.

You will then see the ID number which the user has been allocated on the back-office system.
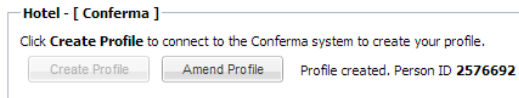
Repeat this process for each type of booking that the user will be performing.

Click **Next** to continue.

Optional: Setting Default Preferences

Under the *Preferences* tab, you can specify any default values for the user. For example, you can specify:

- Cost centres/account codes
- Seating
- Special requirements for flights

You do not need to set any information here, as **the user can set these values themselves once logged in**. If you do specify any preferences, **the information will be filled in automatically** when they get to the relevant sections of the booking process.

However if any preferences are specified, **remember to press *Save* at the bottom right of the window**. This will ensure that any data entered is not lost when the window is closed.

Once you have finished, press *Close* to return to the user list.

Bulk Upload

If you have many accounts which need to be created on Lightning, it's possible to upload them all at once using a single CSV file.
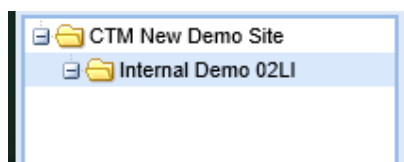
To begin, first click the *User Admin* link within the avatar icon
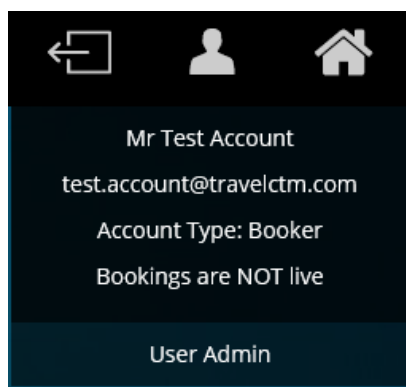
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.
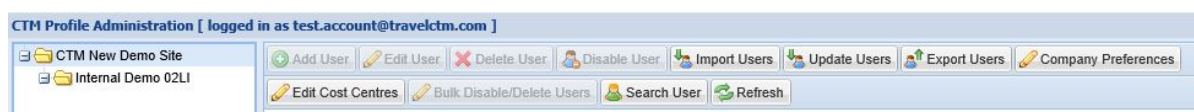
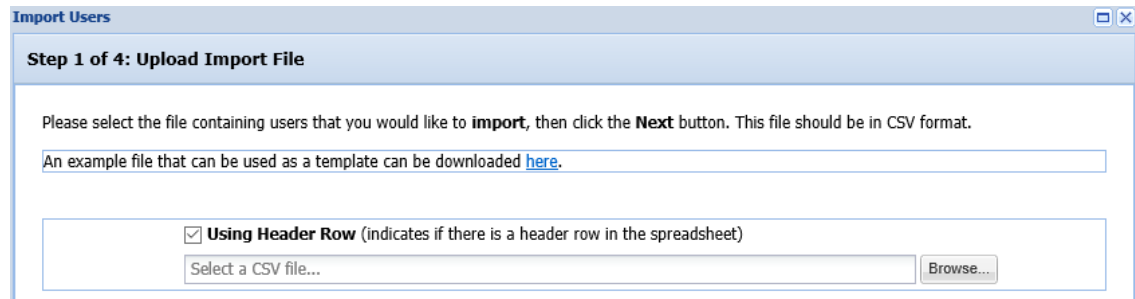Click the folder at office level to see a list of users.

Select the *Import Users* button to begin the four-step upload process.

V2.2b

Upload the CSV File

Click the Browse button to find the CSV file on your computer.

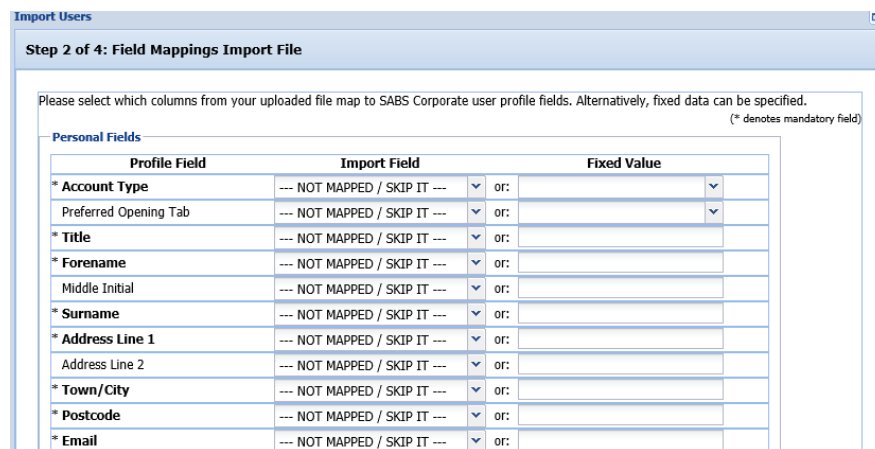Once selected, press the *Next* button to continue.

Field Mappings

Step two will require you to match the contents of the CSV file to the fields on Lightning. You can also use this window to replace or fill in any missing information.

To replace existing information (or provide new information), you can either:

- Select a value from the *Fixed Value* drop down list; or
- Typing in the fields.

Mandatory fields are indicated with an asterisk (*) in front.

If you choose not to enter any information in a non-mandatory field, or there is missing information

from the CSV file, you can set the *Import Field* to '*NOT MAPPED/SKIP IT*'.

The final mandatory options in this window relate to **activating booking profiles**.

The profiles available are displayed in the table opposite.

In the example below, the imported users will not have any profiles enabled automatically

PROFILE TYPE	FEATURES
Cabfind	Taxis
Conferma	Hotels
Evolvi	UK Rail
Sabre	Flights/Eurostar etc.

Enable Accounts

Profile Field	Import Field		Fixed Value
* Cabfind Account	--- NOT MAPPED / SKIP IT ---	or:	false
* Conferma Account	--- NOT MAPPED / SKIP IT ---	or:	false
* Evolvi Account	--- NOT MAPPED / SKIP IT ---	or:	false
* Sabre Account	--- NOT MAPPED / SKIP IT ---	or:	false

Specifying accounts is mandatory information.

Confirm Import Process

Step three shows a preview of the information you are about to import. The number of accounts to be imported is shown in bold at the top.

In addition to mandatory fields, only fields which you have entered information for will be shown in this window.

Below is a preview of the **first user** out of **3**, ready to be **imported** under CTM INTERNAL DEMO   using the details in the following table.
(* subject to existing users been matched using their current **Email** address.)

Account Type	Title	Forename	Surname	Address Line 1	Town/City	Postcode	Email
Traveller	Mr	Some	User	16 Eldon Place	Bradford	BD1 3AZ	1some.user

Click the **Next** button to begin the **import** process.

Click **Next** to continue.

Processing the import

The final step confirms the process.

> You will be emailed shortly with the results of the import.

Any accounts which could not be activated will be shown in this window; it is possible that an incorrect email address was entered for example, or invalid data was entered into the column you selected in **step three.**
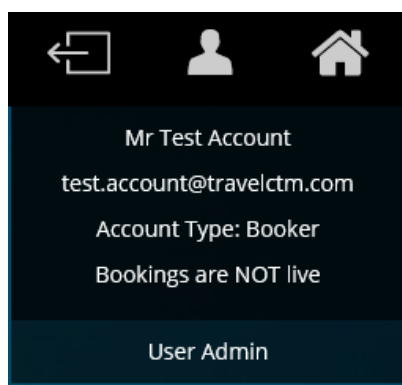
Once complete, click *Finish* to return to the user list; the accounts will be visible automatically. A receipt is sent to your registered email address once complete.
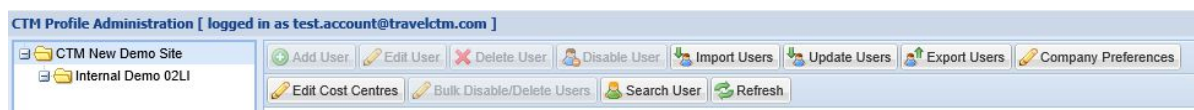
Amending accounts

As an Administrator, you can amend an account of someone within your organisation.
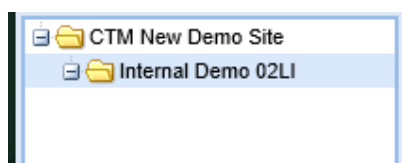
Amending an individual account

To amend a user account, first click the *User Admin* link within the avatar icon

Mr Test Account

test.account@travelctm.com

Account Type: Booker

Bookings are NOT live

User Admin

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.

CTM Profile Administration [logged in as test.account@travelctm.com]

CTM New Demo Site
  Internal Demo 02LI

Add User | Edit User | Delete User | Disable User | Import Users | Update Users | Export Users | Company Preferences
Edit Cost Centres | Bulk Disable/Delete Users | Search User | Refresh

Click the folder at office level to see a list of users.

CTM New Demo Site
  Internal Demo 02LI

Select the user's profile you would like to amend.

Next, click the *Edit User* button. The users profile details will then be displayed on screen, with the 'Personal' tab opened by default.

All sections within the personal tab that *are not* greyed out are amendable by you.
Amend the sections(s) that you require changes to be made to, in this example we are amending the email address.

Details which have been changed will be highlighted in yellow until they are saved.

When all details that require amendments have been actioned select save.
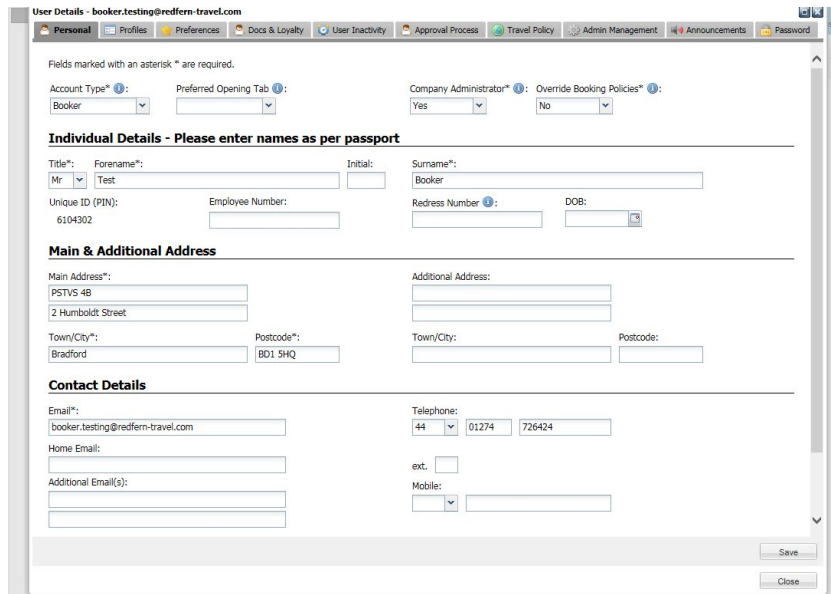
A message will then appear on screen asking you to confirm you would like to save the changes made.

The sections you have amended, that were highlighted in yellow, will now show as normal.

To exit out of the user's account select the cross in the top right corner.

If an email address has been amended, upon the users attempt at logging in they will need to enter the email address into user name and recover password, then follow instructions given on the automated email.

Resetting a password

To reset the user's password, click the *User Admin* link within the avatar icon
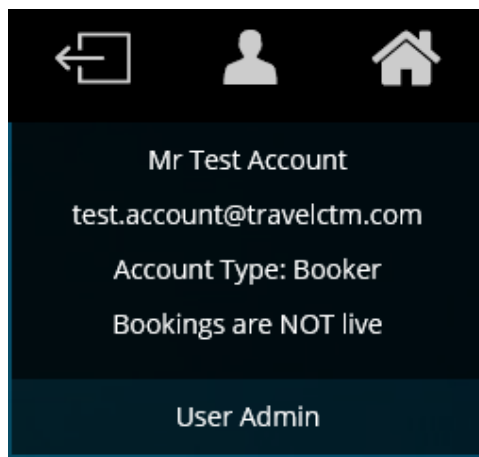
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.
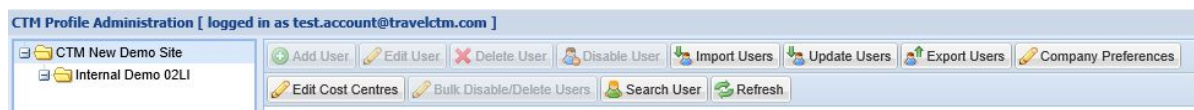
Click the folder at office level to see a list of users.
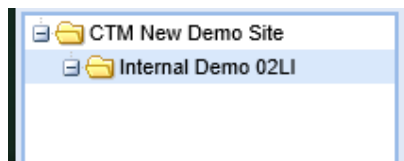
Select the user's profile you would like to change the password for.

Next, click the *Edit User* button. The users profile details will then be displayed on screen, with the 'Personal' tab opened by default.

Select the 'Password' tab.

You will then be prompted to enter:

- **Your own** password
- The new password for the user
- To confirm the new password for the user

When these fields have been filled in select Change Password.

The password will be successfully updated for the user account.
    To exit out of the user's account select the cross in the top right corner.

Deactivating accounts

It's possible to deactivate an account so that the user's details are still stored on Lightning (including all previous booking information), but the user will not be permitted to log in and make bookings.

You can deactivate accounts by either:

- Deactivating a single user
- Bulk deactivating a list of users

As this is a temporary measure, you can easily restore the account later by following the same process again ('*Disable User*' will switch to '*Enable User*').
You may wish to disable a user rather than deleting them if they are seconded away for a period of time, on maternity leave or long-term sick.

Deactivate a Single User

To disable a single user, click the **User Admin** link within the avatar icon
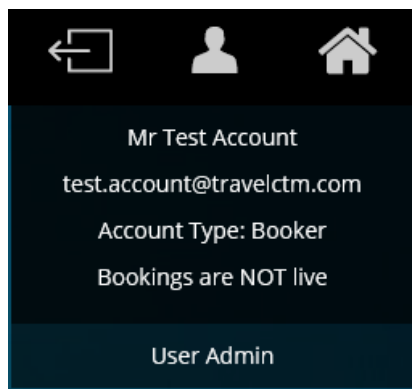
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.
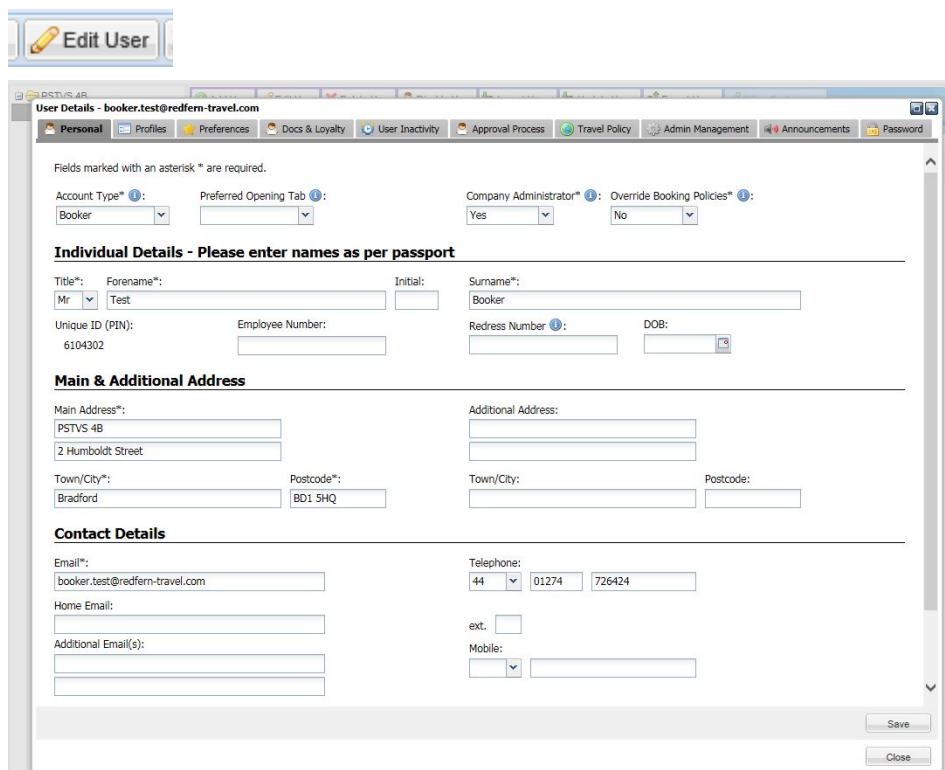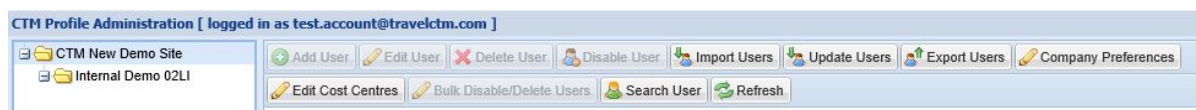

Click the folder at office level to see a list of users.
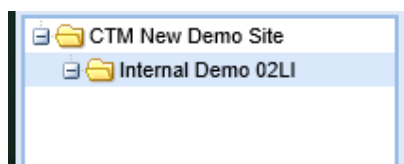
Select the account you would like to disable; this will turn grey.

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Searching for users

If there are a lot of users within your organisation, use the *Search User* button to find an account by their email address or surname.
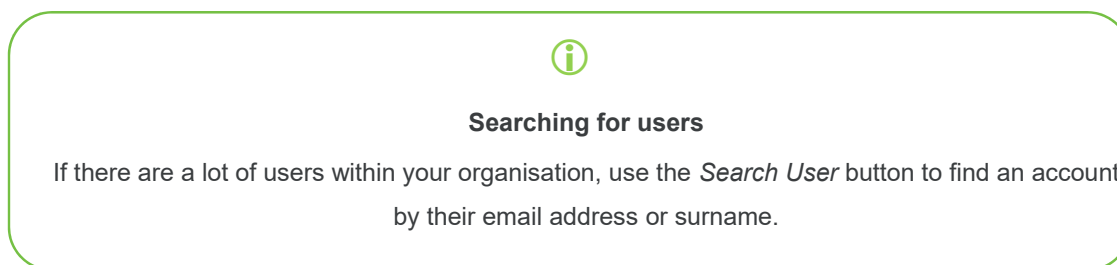
Click the **Disable User** button.

You will be asked to confirm whether you would like to disable the user click '**Yes**' to confirm.

V2.2b
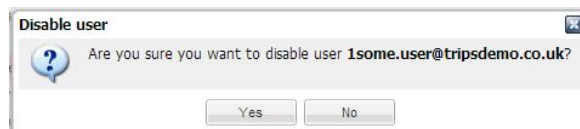
Once the account has been disabled, you will receive an acknowledgement. Press **OK** to close the window and return to the user list.

You will see that the account which has been disabled is highlighted in red.

Modifying disabled accounts

Once an account has been disabled, it will not be possible for either the user or any Administrator accounts to make any modifications to the user's details. If amendments are required, the account will need to be re-enabled first.

It will not be possible to search for any accounts which have been disabled using the *Search User* function; it is only possible to search for active accounts.

Bulk Deactivation

If you have many accounts which need to be deactivated on Lightning, it's possible to deactivate them all at once using a single CSV file.

To begin, first click the **User Admin** link within the avatar icon

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.

Click the folder at office level to see a list of users.

Click the *Bulk Disable/Delete Users* button to begin the five-step deactivation process.

Select an Action

Select the *Disable Users* button. You have a choice whether you would like to use the email address or employee number fields to disable the accounts; in the example below we will use email addresses.

Click *Next* to continue.

Upload the CSV File

Click the *Browse* button to find the CSV file on your computer.

Click *Next* to continue.

Field Mappings

Step three will request you to match the data type to the column in your CSV file. In the example below, the email address field is in the fourth column.

Mandatory fields are indicated with an asterisk (*) in front.

Click *Next* to continue.

ⓘ

Selecting import fields

If the incorrect Import Field is selected, you will receive an error message after selecting '*Next*'.

You will be prompted to return to this screen and choose again.

Confirm the Deactivation

Step four will allow you to preview the accounts which are being deactivated.

Click *Next* to continue.

Processing the Deactivation

The final step confirms the process.

A receipt is sent to your registered email address once complete.

Any accounts which could not be deactivated will be shown in this window; it is possible that an incorrect email address was entered for example, or invalid data was entered into the column you selected in **step three.**

Once complete, click *Finish* to return to the user list; the deactivated accounts will be shown in red.
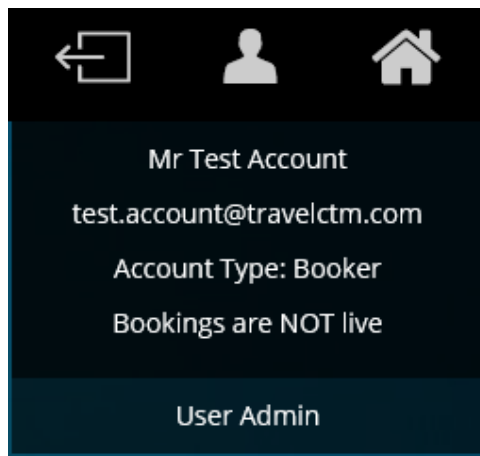
Once an account has been disabled, it will not be possible for either the user or any Administrator accounts to make any modifications to the user's details. If amendments are required, the account will need to be re-enabled first

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Having trouble finding an account?

It will not be possible to search for any accounts which have been disabled using the *Search User* function; it is only possible to search for active accounts.

Deleting accounts

If a user is leaving the organisation, they can be permanently removed from the system by deleting the account.

You can delete accounts by either:

- Deleting a single user
- Bulk deleting a list of users

ⓘ

Before you delete an account

Deleting a user is permanent and non-reversible. You will not be able to recover any account details once you have removed the profile. If there is a possibility the user will require the account again, consider deactivating it.

Delete a single user

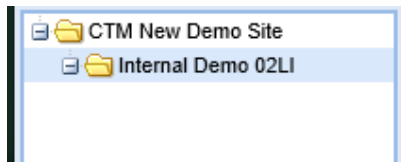To delete a single user, click the *User Admin* link within the avatar icon
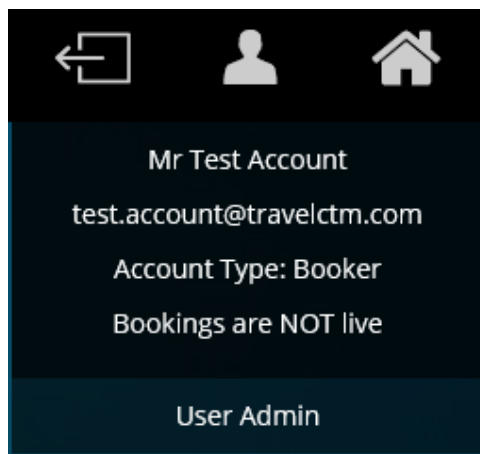
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.
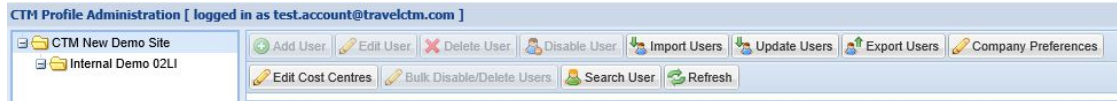
Click the folder at office level to see a list of users.
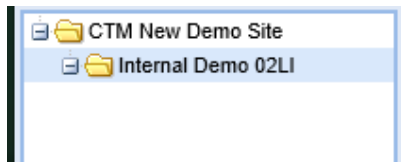
Select the account you would like to delete and click the **Delete User** button.
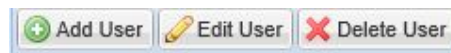
You will be asked to confirm whether you would like to delete the user; click '*Yes*' to continue.
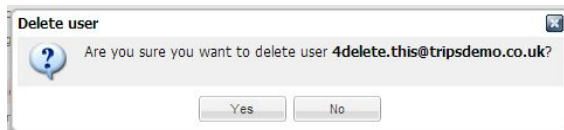
Once successfully deleted, you will receive an acknowledgement.

Click *OK* to close the window and return to the user list.
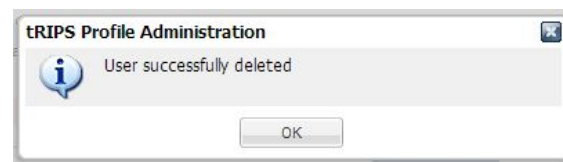
The user will no longer be visible on the user list.

Retrieving information from deleted accounts

Once an account has been deleted, it is not possible to retrieve any data which was contained their Baskets Manager.

Bulk Delete

If you have many accounts which need to be deleted on Lightning, it's possible to delete them all at once using a single CSV file

To begin, click the **User Admin** link within the avatar icon
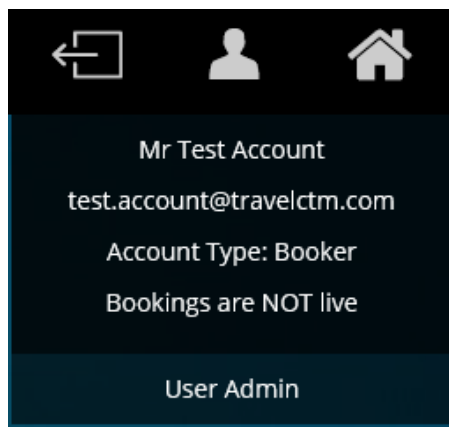
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.
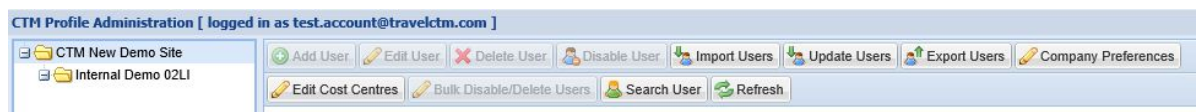
Click the folder at office level to see a list of users.
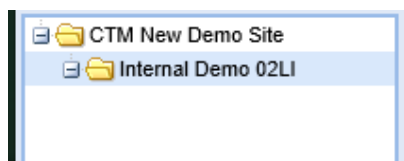
Click the Bulk Disable/Delete Users button.

Select an Action

Select the *Delete Users* button. You have a choice whether you would like to use the email address or employee number fields to disable the accounts; in the example below we will use email addresses.

> Following this wizzard should help you **Disable** *or* **Delete** multiple users via CSV file upload.
>
> ○ Disable Users
> ◉ Delete Users
> Here you can indicate the **type of action** you would like to initiate.
>
> ◉ Email Addresses
> ○ Employee Numbers
> Here you can indicate the **type of data** you would like to upload.
>
> Once you have made your choices, you could click the **Next** button for further assistance.

Click *Next* to continue.

Upload the CSV File

Click *Browse* to find the CSV file on your computer.

> Here you can upload a CSV file containing the **Email Addresses** of the users you wish to **Delete**.
> The CSV file must have *one column field* with **emails** data.
>
> | Demo User List.csv | Browse... |
>
> Once you have selected a CSV file, you could click the **Next** button for further assistance.

Click *Next* to continue.

Field Mapping

Step three will request you to match the data type to the column in your CSV file. In the example below, the email address field is in the fourth column.

> Here you can select *which column field* of the CSV file should be mapped.
>
> (* denotes mandatory field)
>
> **Map Fields**
>
> | Type of data | Import Field |
> |---|---|
> | * Email Addresses: | Column: label [D] - number [4] ▼ |
>
> Once you have made your choice, you could click the **Next** button for further assistance.

Mandatory fields are indicated with an asterisk (*) in front.

Click *Next* to continue.

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Confirm the Deletion

Step four will allow you to preview the accounts which are being deleted.

ⓘ

Before you delete accounts

Please double check that the correct accounts are being removed from the system. It will not be possible to reinstate these accounts once they have been deleted.

Click **Next** to continue.

Processing the Deletion

The final step confirms the process.

Any accounts which could not be deleted will be shown in this window; it is possible that an incorrect email address was entered for example, or invalid data was entered into the column you selected in **step three.**

Once complete, click **Finish** to close the window and return to the user list; the users will no longer be visible.

3 users were successfully **deleted.**

Thank you for using this wizzard.

ⓘ

Retrieving information from deleted accounts

Once any accounts have been deleted, it is not possible to retrieve any data which was contained in their Baskets Manager.

Booking codes

Adding booking codes

A booking code is a piece of information you wish to appear on your invoice or MI that can be captured at the time of booking. As an Administrator, you are able to add new booking codes by either:

- Adding a single code
- Bulk uploading a list of codes.

Adding a single code

To add a single code, click the **User Admin** link within the avatar icon

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.

While at company level, click the **Edit Cost Centres** button.

The 'Edit Cost Centres' window will appear; you will be able to see the list of fields in use for each type of booking.

After clicking the type of code you want to add, press **Click for Values** (under the 'Mask' column) or the **Add/Edit Cost Centre Values** button to bring up the list of codes currently in use.

To add a new value, click the **Add New Value** button.

The 'New Value' window will appear; type in the code to be used in the 'Value' field. You can also assign a description for the code in the 'Label' field.
Press **Save** to add the code to the list.

The list updates immediately after you have added a code.

Click the cross in the top right to close the window.

Booking codes are available for use the next time a booker logs in to the system. It will not be possible to use a new code if they are already part-way through a booking.

(i)

Adding a new code?

Please notify CTM of any new booking codes you are using, as these need to be added to a back-office system to work correctly. If a code has not been added to the system, it can cause bookings to fail.

Bulk Uploading Codes

If you have many booking codes which need to be added to Lightning, it's possible to upload them all at once using a single CSV file.

To begin, click the *User Admin* link within the avatar icon
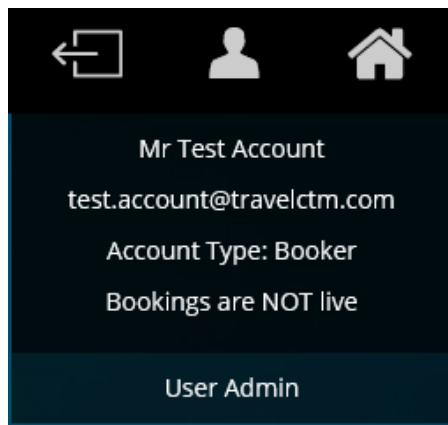
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.
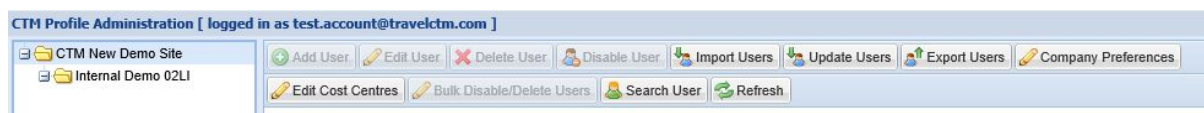
While at company level, click the *Edit Cost Centres* button.

The 'Edit Cost Centres' window will appear; you will be able to see the list of fields in use for each type of booking.

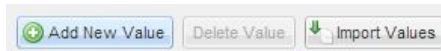| Cost Centre ▲	Val. Type	Mask	Handoff	Info
⊟ Type: Air - Full Service Carriers [Sabre] (4 Items)				
Cost Centre Box	Dropdown	click for values	PAXUDF3	
Have you had confirmation to bo…	Dropdown	click for values	PAXUDF6	
Name of authorising manager	Dropdown	click for values	PAXUDF5	
Project Code	Mask	AAA111	PAXUDF4	
⊟ Type: Air - Low Cost Carriers [Multicom] (4 Items)				
Cost Centre Box	Dropdown	click for values	PAXUDF3	
Have you had confirmation to bo…	Dropdown	click for values	PAXUDF6	
Name of authorising manager	Dropdown	click for values	PAXUDF5	
Project Code	Mask	AAA111	PAXUDF4	
⊟ Type: Hotel - [Conferma] (4 Items)				
Cost Centre Box	Dropdown	click for values	1	
Have you had confirmation to bo…	Dropdown	click for values	4	

After clicking the type of code you want to add, press **Click for Values** (under the 'Mask' column) or the **Add/Edit Cost Centre Values** button to bring up the list of codes currently in use.

Cost Centre Value ▲	Label
1E	
CTM	
Test	

Click the **Import Values** button.
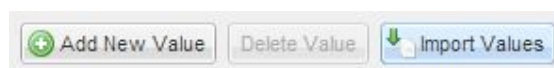
A new window will appear, prompting you to search for the CSV file containing your booking codes. Click **Browse** to search.

Once the CSV file has been uploaded, you have two options available to you:

- **Add CSV values to list** – Keep the original code list and add the new ones;
- **Delete list and add CSV values** – Delete the original list and keep the uploaded values.

If you are adding new values to an existing list, you can also tick the *Replace Duplicates* box to ensure that a code is not added more than once.

Click **Next** to continue.

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You will receive a prompt on screen about how many values are to be added. Click *Next* to continue.

Once successfully added, you will receive an acknowledgement. Click *OK* to close the window and return to the code list.

You will see it has been added to the list. Click the cross in the top right to close the window.

Cost Centre Value ▲	Label
1E	
Cost Centre	
D3M01	
D3M02	
D3M03	
D3M04	
D3M05	
Redfern	
Test	

Booking codes are available for use the next time a booker logs in to the system. It will not be possible to use a new code if they are already part-way through a booking.

ⓘ

Adding a new code?

Please notify CTM of any new booking codes you are using, as these need to be added to a back-office system to work correctly. If a code has not been added to the system, it can cause bookings to fail.

Deleting booking codes

To delete a booking code, click the **User Admin** link within the avatar icon

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons.

While at company level, click the **Edit Cost Centres** button.

The 'Edit Cost Centres' window will appear; you will be able to see the list of fields in use for each type of booking.

After clicking the type of code you want to delete, press **Click for Values** (under the 'Mask' column) or the **Add/Edit Cost Centre Values** button to bring up the list of codes currently in use.

Cost Centre Value ▲	Label
1E	
Cost Centre	
D3M01	
D3M02	
D3M03	
D3M04	
D3M05	
Redfern	
Test	
D3L3T3	

Click the code you would like to delete; this will be highlighted in grey. Click the **Delete Value** button.

Add New Value   Delete Value   Import Values

You will be asked to confirm the deletion; click '**Yes**' to delete.

Delete Value

? Are you sure you want to delete this value?

Yes   No
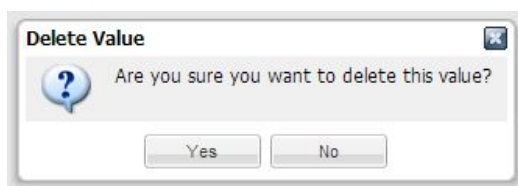
You will see that the value has been deleted from the list.

Cost Centre Value ▲	Label
1E	
Cost Centre	
D3M01	
D3M02	
D3M03	
D3M04	
D3M05	
Redfern	
Test	

> ⓘ
>
> **Retrieving deleted codes**
>
> It is not possible to recover any codes which have been deleted. You will need to **add them manually,** or **re-upload via a CSV file.**

Customising Lightning

You can customise Lightning to suit your individual company needs. Ways you can customise include:

- Setting **system announcements** specific to your organisation;
- Setting and amending your company **travel policy.**

Displaying system announcements

You can set system announcements (information messages) for your organisation through your 'Company Preferences' screen. These messages will display initially on the fare/accommodation selection screen for your users.

It's also possible to **opt-in** (or **opt-out**) to receive travel advice from the Foreign and Commonwealth Office.

Travel Advice

FCO travel advice can be shown to bookers if they (or a colleague) are travelling overseas. These alerts will link to **www.gov.uk/foreign-travel-advice** and provide information on any problems (e.g. political unrest) that they may encounter on their trip.

To receive travel advice from the FCO, first click the *User Admin* link within the avatar icon
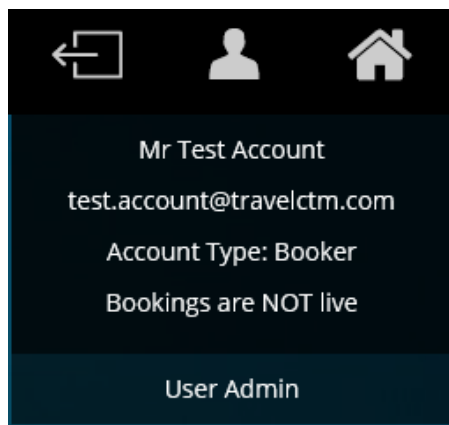
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons. Click the **Company Preferences** button.

A window named 'User Details' will open; click the ***Announcements*** tab.

At the top of the 'Announcements' page, you will see a tick-box under the 'Travel Advice and Alerts' heading.

Ticking this box will display travel alerts to bookers if they (or another traveller) are going overseas. For example, if they are booking a hotel in New York, they will see any alerts for the whole of the United States on a green message.
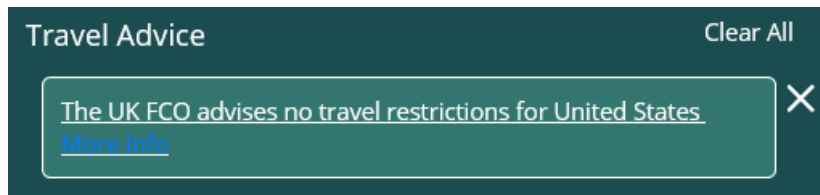
Clicking on the *More Info* link will send them to the applicable country page on **www.gov.uk/foreign-travel-advice.**

Foreign travel advice

USA

Summary
Current travel advice

Safety and security

Terrorism

Local laws and customs

Entry requirements

Health

Natural disasters

Contact FCO Travel Advice Team

Arctic travel

Get updates ✉ **email** 🔊 **feed**

Summary

Still current at: 6 January 2017
Updated: 16 December 2016
Latest update: Summary – removal of information and advice on wildfires in Tennessee

Snow storms during winter can cause delays and cancellations throughout the major airline hubs in the USA. See Natural disasters

---

Opting Out of Travel Alerts

To opt-out of the travel alerts (and remove the green information banner from Lightning, you will need to return to the **Announcements page.**

First click the *User Admin* link within the avatar icon
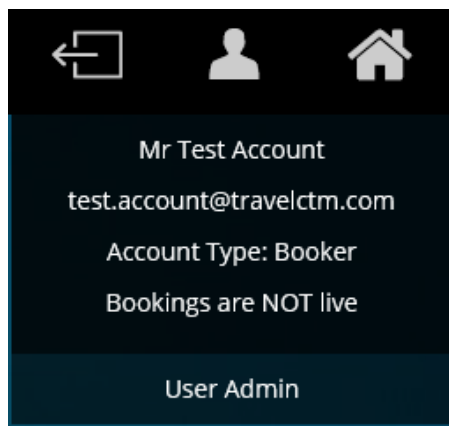
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons. Click the **Company Preferences** button.

A window named 'User Details' will open; click the *Announcements* tab.

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Un-tick the box under the 'Travel Advice and Alerts' heading; this will remove the green banner for all bookers.

Travel Advice and Alerts

☐ Enable Foreign and Commonwealth Office Travel Advice and Alerts

Press the **Save** button at the bottom of the window.

Adding New Announcements

To set an announcement, click the **User Admin** link within the avatar icon
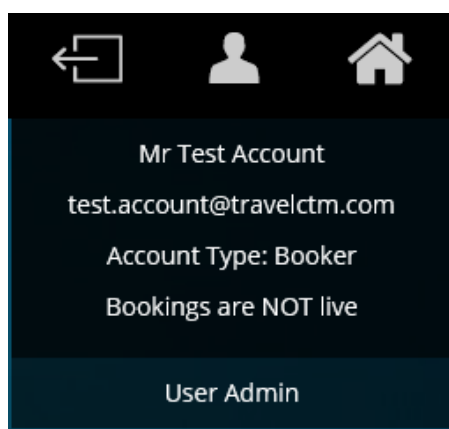
Mr Test Account
test.account@travelctm.com
Account Type: Booker
Bookings are NOT live

User Admin

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons. Click the **Company Preferences** button.

Import Users | Update Users | Export Users | Company Preferences

A window named 'User Details' will open; click the **Announcements** tab.
Messages can be set individually for each type of booking, e.g. a tube strike can be mentioned on the Rail booking page.
Announcements under the 'System' heading will display under each section across the Lightning web site.

System

[+] Add New Announcement...

Rail

[+] Add New Announcement...

Hotels

[+] Add New Announcement...

Air

[+] Add New Announcement...

Eurostar

[+] Add New Announcement...

Taxi

[+] Add New Announcement...

Parking & Lounges

[+] Add New Announcement...

Click the *Add New Announcement...* button to add a new message.

An additional space will then appear. Enter the message you would like to display and press the *Save* button at the bottom of the window. In this example, we will add a rail message.

Rail

	Date		Station		No. of PAX	Message
✖	From: ☐ (Any)	Dep: ☐ (Any) ▾	☐ (Any)	Please note, a tube strke is planned in London on this date.
	To: ☐ (Any)	Dest: ☑ London ▾		
✖	From: ☐ (Any)	Dep: ☐ (Any) ▾	☐ (Any)	This is a demo message.
	To: ☐ (Any)	Dest: ☐ (Any) ▾		

[+] Add New Announcement...

This message will now appear each time the user is booking a rail journey.

Overviews on the different ways you can set announcements are listed below.

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TYPES OF ANNOUNCEMENT	DISPLAYS...	HOW TO SET IT
Date-specific	For particular dates before activating/expiring.	1. Clicking *Add New Announcement…* under the booking type; 2. Enter the date(s) in *From/To* where the announcement should apply.
Station (or airport)-specific	Only if the passengers are travelling from/to a particular station/airport.	1. Click on *Add New Announcement…* under the booking type; 2. Tick the *Dep* and/or *Dest* boxes and; 3. Typing the station/airport names which the announcement should apply.
Passenger-specific	When a certain amount of passengers (or guests) are specified on the search screen.	1. Click on *Add New Announcement…* under the booking type. 2. Tick the *No. of Pax* box; 3. Enter the number of passengers/guests where the announcement should apply.
System wide	On every booking screen; can be used in combination with the above.	Click *Add New Announcement…* under the System heading.

After making modifications to this page, click *Save* to confirm the changes

Removing Announcements:

You can remove information messages for your organisation through your Company Preferences screen. These messages will display initially on the fare/accommodation selection screen for your users.

To remove an announcement, click the *User Admin* link within the avatar icon

You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons. Click the **Company Preferences** button.

A window named 'User Details' will open; click the **Announcements** tab.

Click the **red** X next to the announcement you want to delete.

The page will update automatically.

Press **Save**.

Once deleted, press **Close** to return to User Admin.

Still seeing old messages?

If users are still able to see the messages after they have been deleted, they will need to clear their temporary internet files (cache). Pressing Ctrl and F5 keys together often helps.

Amending the travel policy

If your organisation only allows bookings to be made up to a particular price, or requires approval before the user can make a booking, you can set a travel policy within Lightning so users cannot exceed their limits.

To access the travel policy screen, first click the *User Admin* link within the avatar icon
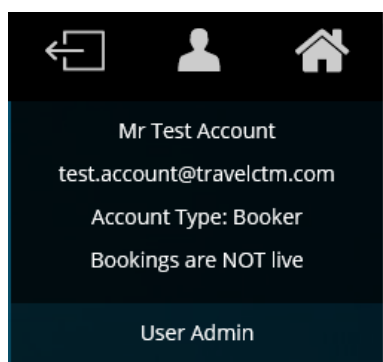
You will see your company listed on the left, with any offices/branches listed underneath. On the right, you will see the administrator action buttons. Click the **Company Preferences** button.

A window named 'User Details' will open.

Approval Process

If you require bookers to seek approval from a designated user (or users) before bookings can be completed, click the *Approval Process* tab.
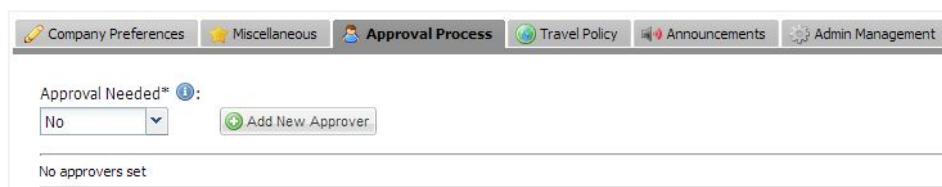
Changing the '*Approval Needed*' box to '*Yes*' will mean that the booker won't be allowed to complete the booking without prior approval from a designated user.

You can specify the approver's email address by clicking the **Add New Approver** button.

If circumstances change, you can remove an approver by clicking the red X button next to the approver's email address.

Once you have added the email addresses for approvals, click the **Save** button at the bottom to confirm the changes.

Notification-Only Approval

Instead of requiring manual intervention each time a booking is made, you can specify that approvers can just be notified each time a booking is made.

ⓘ

Does switching notifications on prevent bookings?

This option will **not** stop a booking being made – bookers will still be allowed to follow the booking process through to the confirmation stage.

To activate this option, select '*Notify Only*' from the '*Approval Needed*' drop-down menu.

Travel Spend and Route Restrictions

A company-wide travel policy can be set for **rail, hotels**, **flights / Eurostar and car hire.** Below is a breakdown of the different options available to administrators.

Rail

Defining travel policy dependent on journey time.

Both travel class and price restrictions can be made based on whether the journey is a 'normal' or 'long' journey.

If you wish to break down your travel policy, tick the box labelled '*Allow different Travel Policies for short and long journeys*'. This will reveal an additional box where you can enter an additional policy for long journeys.

Next, define a length of time (in hours) which the journey needs to exceed before the 'long' journey policy takes effect.

Hover over the blue icon to view further information.

Travel Class Restrictions:

The default travel class allowed is '*Any*'; this will allow bookers to choose both Standard and First Class fares.

If there is a restriction on First Class travel, select *Standard* as your maximum class. This will restrict bookers to view Standard Class fares only.

You can however select to enable bookers to choose First Class if it is cheaper than the least expensive Standard Class fare, or within a percentage of the least expensive Standard fare.

Hover over the blue icon to view further information

Price Restrictions:

Price restrictions can be enabled so a booker cannot select a fare which goes over a particular price, or they have to specify a reason for not choosing the cheapest fare.

'*Allow With Reason*' will let users book up to the specified value, but they will have to select a reason for choosing that fare. '*Disallow*' will prevent the user booking anything over the specified value.

Rail Operator Restrictions:

Specific train operators can be disallowed by clicking on their name and pressing the → button.

They can be re-enabled by clicking their name and pressing the ← button.

Route Restrictions:

Specific routes can be disallowed by clicking *Add Route*.

You will need to specify the departure and arrival points.

Click the *Add Route* button to add the journey.

If you specify Manchester to London, the restriction will apply to travel from/to all Manchester and London stations. You can be more specific by putting Manchester Piccadilly to London Euston for example.

Restrictions can be removed by pressing the *Delete Route* button.

<u>Hotels</u>

Price Restrictions:

Price restrictions can be enabled so a booker cannot select a rate which goes over a particular price, or they have to specify a reason for not choosing the cheapest rate.

'Allow With Reason' will let users book up to the specified value, but they will have to select a reason for choosing that rate. *'Disallow'* will prevent the user booking anything over the specified value. Regional price restrictions can also be applied by clicking the *Add Policy* button; this will override the values specified in *Price Restrictions*. This is useful when booking around London for example, as you could specify a higher limit for central London and a lower limit for outer London.

Price Restrictions

"Allow With Reason (and Approval)" Price ⓘ:	☑	85
"Disallow" Price ⓘ:	☑	150

Hover over the blue icon to view further information.

The example restriction below specifies a buffer rate for central London; bookers will be able to book over £120 – and up to £150 – by specifying a reason, for example availability. However, any rates over £150 cannot be booked.

Regional Price Restrictions

Region ▲	"Allow With Reason" Price	"Disallow" Price
London_Central	£120	£150

⊕ Add Policy   ✖ Delete Policy

You can remove a policy by pressing the *Delete Policy* button.

ⓘ

Applying travel policy

These policy limits will apply unless you have selected the **Override Booking Policies** option on the booker's profile.

Hotel Chain Restrictions:

Specific hotel chains can be disallowed by clicking on their name and pressing the → button.
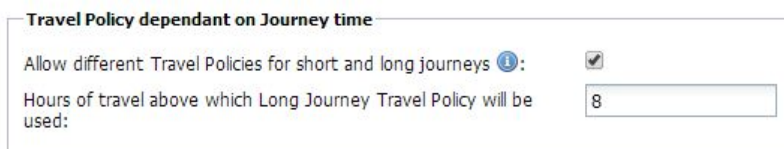
They can be re-enabled by clicking their name and pressing the ← button.

Air & Eurostar

Flights and Eurostar travel policies are combined under one heading, so the values set will apply to both types of travel.

Time-Based Travel Policy:

Different travel policies can be specified for long and short haul journeys; simply tick the '*Allow different Travel Policies for short and long journeys*' and set the number of hours to distinguish short and long journeys.

Hover over the blue icon to view further information.

For normal (short) journeys, you can specify any limits on travel class and price restrictions.

Travel Class Restrictions

The default travel class allowed is '*Economy*'.

If there is a restriction on travel class, select the maximum class which your policy allows; for example, if bookers cannot purchase Business or First class tickets, select Premium Economy as your limit.

Selecting '*Any*' from the drop-down menu will remove any restrictions on travel class, as bookers will be able to view all types of fare.

Hover over the blue icons to view further information.

If you have specified you would like different travel policies depending on travel time, you can also select travel class and price restrictions for 'long journey'.

Price Restrictions:

Price restrictions can be enabled so a booker cannot select a fare which goes over a particular price, or they have to specify a reason for not choosing the cheapest fare.

'Allow With Reason' will let users book up to the specified value, but they will have to select a reason for choosing that fare. **'Disallow'** will prevent the user booking anything over the specified value.

Airline Restrictions

Specific airlines can be disallowed by clicking on their name and pressing the → button.
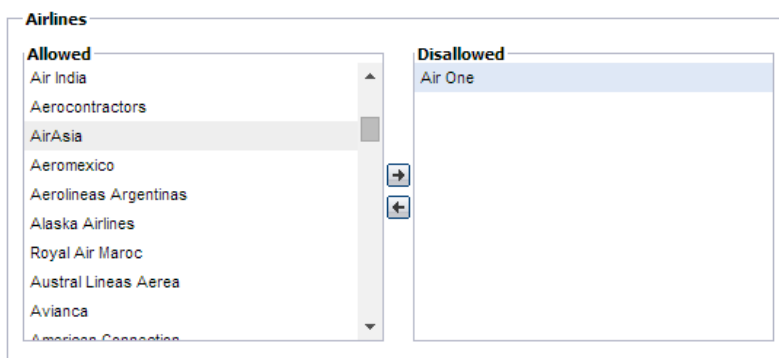
They can be re-enabled by clicking their name and pressing the ← button.

Route Restrictions:

Specific routes and countries can be disallowed by clicking Add Route, then the departure and arrival points.

You can specify the specific departure and arrival points, or *From Anywhere…* to be more general.

Click the **Add Route** button to add the journey.

If you need to disallow London to New York journey for example, you will need to add both London to New York and New York to London.

If you specify London to New York, the restriction will apply to travel from/to **all** London airports. You can be more specific by putting London Heathrow to New York for example.

Restrictions can be removed by pressing the **Delete Route** button.

Car Hire

Price Restrictions:

Price restrictions can be enabled so a booker cannot select a basic daily rental charge which goes over a particular price, or they have to specify a reason for not choosing the cheapest rental charge.

'Allow With Reason' will let users book up to the specified value, but they will have to select a reason for choosing that rate. **'Disallow'** will prevent the user booking anything over the specified value.

Travel Class Restrictions

'Travel Class' refers to the class of vehicle that can be selected.

V2.2b

Selecting 'Any' will allow any vehicle class to be selected.

Adding preferred (or corporate) rates for car hire

If you have preferred rates in place with a particular car hire company, you can add them in to the *Corporate Supplier Requests* tab.

Click the *Add Account* button to enter the associated details.

CVS file preparation

If you are uploading multiple users or codes at the same time, you will need to enter the data into a Comma Separated Value (CSV) file. You will need software capable of creating spreadsheet files, for example Microsoft Excel or OpenOffice Calc.

Required fields

When creating your file, you will need ten fields. These are:

Title	Forename
Surname	Email
Address Line 1	Address Line 2
Town/City	Postcode
Telephone	Account Type

The above fields are compulsory; however you can add additional fields such as Cost Centre, Account Code etc. if you wish. To add further fields, enter the name of the field at the top of the file.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address		Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type

Inputting user information

Title

A user's title needs to be one of six options, as these are the options available on the drop-down on the Lightning profile screen.

Prof	Dr
Mr	Mrs
Ms	Miss

If any other titles or punctuation is entered (e.g. "Mr.") this will cause errors in the user's profile and problems when booking.

Names

It is generally recommended that the name input on Lightning matches the one on the traveller's passport.

This will help avoid any problems with flights for example, where the traveller could possibly be delayed or incur additional fees for changing the name on the booking.

Please ensure that the names are no longer than 20 characters, as this can cause problems with the back-office booking systems.

Email Addresses

The email address needs to match the user's work (or personal) email address exactly; otherwise they won't be able to receive email confirmations once they have completed bookings. Please ensure that email addresses are no longer than 50 characters, as this can cause problems with the back-office booking systems.

Addresses

If all your users are based at a particular location, you can fill in one address and copy and paste it for the rest of the accounts. To do this, first highlight the information you wish to copy.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk						
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk						

Drag the black square (on the bottom right of your selection) downwards.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk	AiT House	17 Eldon Place	Bradford	BD1 3AZ		
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk	AiT House	18 Eldon Place	Bradford	BD1 3AZ		
5										

You will notice that instead of copying the exact address (16 Eldon Place), the number has increased by one for each user. To get around this, click the **Auto Fill Options** icon next to the black square.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk	AiT House	17 Eldon Place	Bradford	BD1 3AZ		
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk	AiT House	18 Eldon Place	Bradford	BD1 3AZ		
5										
6										
7										
8										
9										
10										

○ Copy Cells
◉ Fill Series
○ Fill Formatting Only
○ Fill Without Formatting

Change the selection to **Copy Cells** (instead of *Fill Series*) to update the information.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		

Telephone number

The telephone number is the final mandatory field required to create a Lightning account. This number is used by default for flights and Eurostar bookings; flight operators for example will use this if there is an issue with a booking.

If all the users in your organisation share the same work telephone number, you can copy and paste it for all users. To do this, first highlight the number you wish to copy.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	01274 726424	
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ		

Drag the black square (on the bottom right of your selection) downwards.

	A	B	C	D	E	F	G	H	I	J
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	01274 726424	
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	1275 726424	
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	1276 726424	
5										

You will notice that instead of copying the exact phone number, the zero has been missed for each number copied and the number at the end has increased by one each time. To get around this, click the *Auto Fill Options* icon next to the black square.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Title	Forename	Surname	Email Address	Address Line 1	Address Line 2	Town/City	Postcode	Telephone	Account Type		
2	Mr	Some	User	1some.user@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	01274 726424			
3	Ms	Demo	Account	2demo.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	1275 726424			
4	Mr	Dummy	Account	3dummy.account@tripsdemo.co.uk	AiT House	16 Eldon Place	Bradford	BD1 3AZ	1276 726424			
5												
6												
7												
8												
9												
10												

- ○ Copy Cells
- ◉ Fill Series
- ○ Fill Formatting Only
- ○ Fill Without Formatting

Change the selection to *Copy Cells* (instead of *Fill Series*) to update the information. Below shows you what the spreadsheet should look like when this is complete.

Account Types

Specifying an account type in your file is not mandatory as it can be specified at a later date, but it can be useful to add this if all your users will be set up in the same way.

Drag the black square (on the bottom right of your selection) downwards.

You will notice that instead of copying the exact phone number, the zero has been missed for each number copied and the number at the end has increased by one each time. To get around this, click the *Auto Fill Options* icon next to the black square.
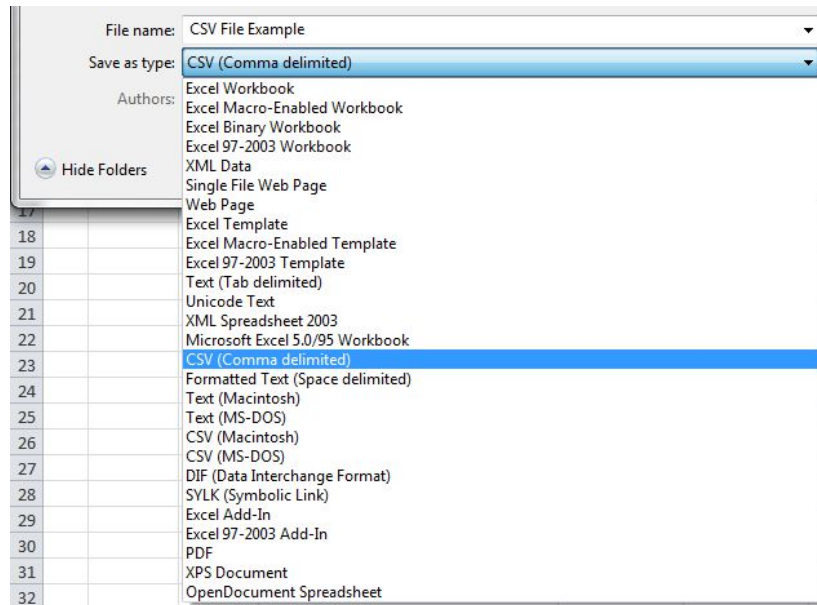

Change the selection to *Copy Cells* (instead of *Fill Series*) to update the information.

Saving the file

When you have finished, click on *File* and go to '*Save As…*'

The 'Save As' window will appear; click on the *Save as type* drop-down menu and select *CSV (comma delimited)*.

Errors can occur with uploads if the wrong file type is chosen, so please ensure it is correct before saving.