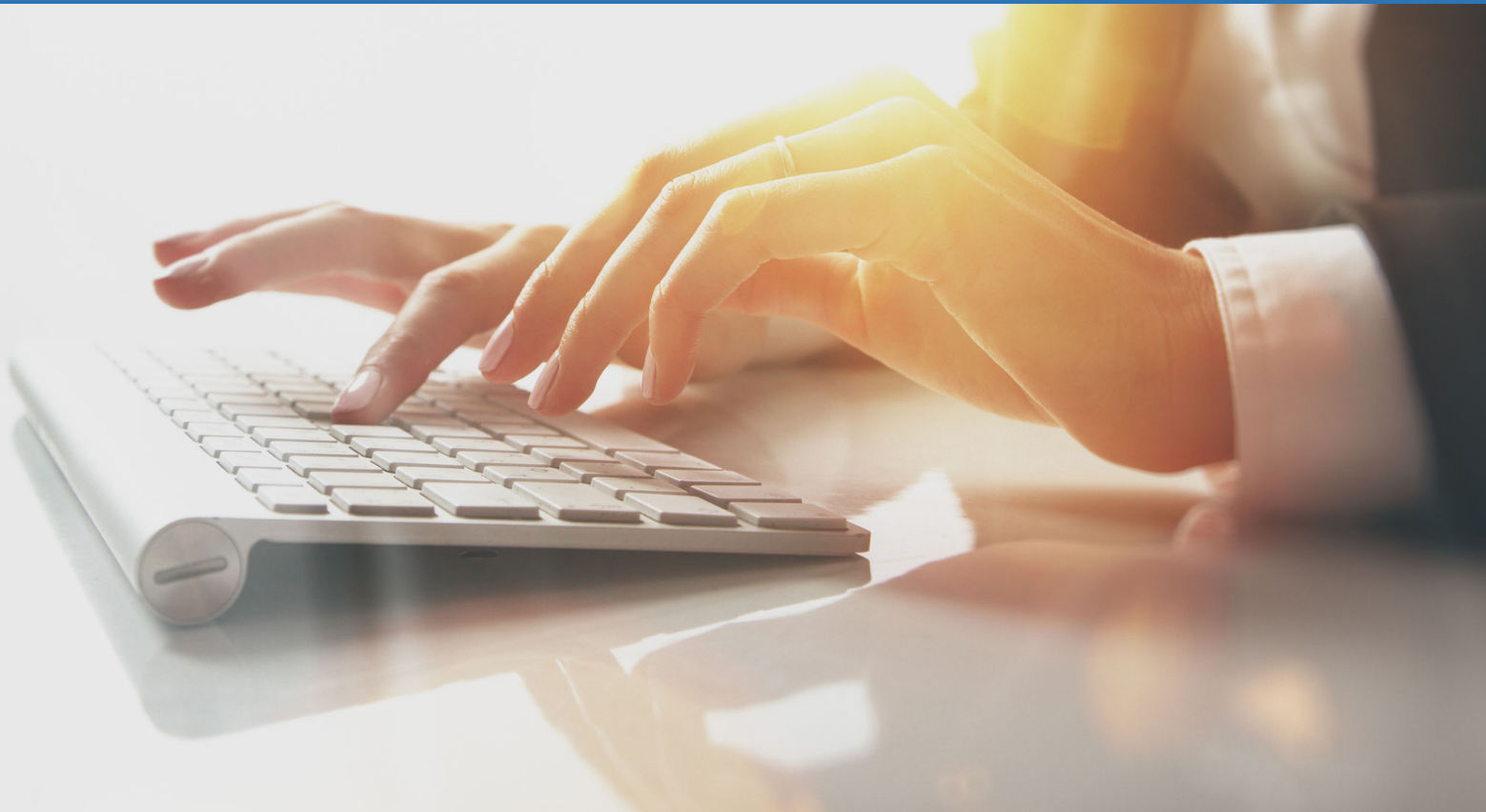# Short's Travel Management (STM) Admin Guide Profolio by ETSI

ADMIN GUIDE

STM Admin Guide

CONTENTS

Intro to Profolio by ETSI

About Profolio

Profolio is traveler profile database that provides capabilities for managing traveler profiles in a secure central location.

Short's Travel began using Profolio in 2021 in order to work with an industry leading travel profile system that is continuously enhanced and supported.

Profolio Roles

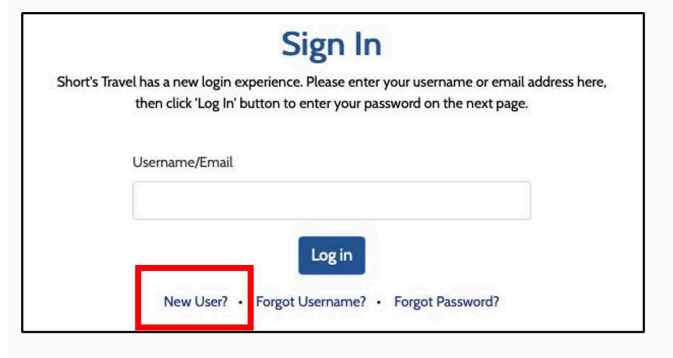The following roles are available to assign to any profile in Profolio:

- Traveler – Basic security level most all profiles have
- Travel Coordinator – Just like a Travel Manager but cannot create users.
- Travel Manager – Full control over all account users, and some basic admin capabilities. Profiles with this role will be added automatically as a travel arranger to every profile in this account when pushed to the online booking tool.

User Management

Building a New User

SELF-REGISTRATION

For accounts that are configured to allow traveler self-registration, there should be a New User link on that client's login page from their client specific link which will allow the traveler to start the self-registration process. There are client configuration options available to limit registrations to a specific email domain, and options to require client approval of self-registered accounts before being made active.

Sign In

Short's Travel has a new login experience. Please enter your username or email address here, then click 'Log In' button to enter your password on the next page.

Username/Email

[Log in]

New User? • Forgot Username? • Forgot Password?

MANUAL TRAVELER CREATION

Travel Managers within Profolio can create a user manually by using the 'My Account' menu at the top of the Profolio, and then choosing the 'Create New User' menu item to start the account registration process starting with entering the users email address.

MY PROFILE +   JENNIFER'S PROFILE +   SEARCH +   MY AGENCY   MY ACCOUNT   ADMIN FUNCTIONS +   REPORTS   LOGOUT

Profile for Shorts Travel Management

Account Information −

- Account Information
- Account Payment Information

Account Settings +

Additional Account Settings +

Account Field Configuration −

- Account
- Address
- Comment
- CreditCard
- Document
- FamilyInformation
- Membership
- TravelCredit
- Traveler
- TravelerExtended

Abstract & Custom Values −

- Abstract Values
- Custom Values

Announcements & Resources −

- Announcements
- Resources

Create New User +

**SPECIAL SELF REGISTRATION LINK**

On the Account page for each client, at the bottom of the page, there is a special self-registration weblink that can be sent to someone that will allow them to create their own profile. **Note This link bypasses some of the account creation controls that may be configured for an account, so should only be used when explicitly called for.

Self-Registration URL

https://account.shortstravel.com/register/register.aspx?AccountGUID=BA0EDE1F-3A78-4840-8136-EE4F4723297B&Branding=DEV&AccountID=1

Searching for a User

To search for a user, click on "Search" in the menu at the top of the page.
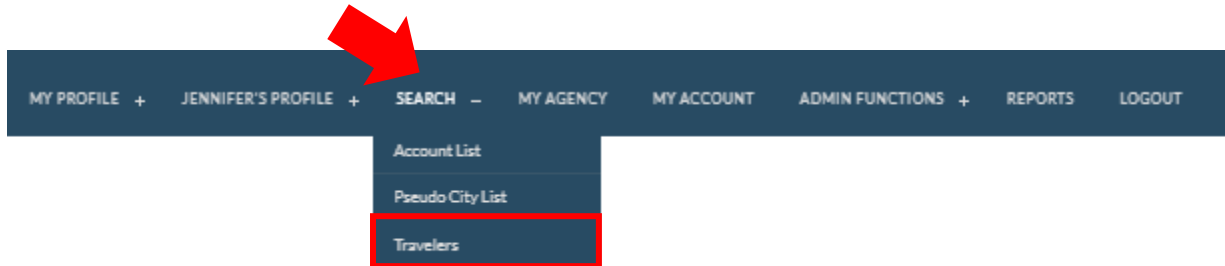
Enter your travelrs last name, first name, or username and then click search. Then, click on the user you wish to update in the result list.

Inactivating and Reactivating a User

After doing a Search/Traveler for the traveler of interest, scroll to the bottom of the traveler's profile page and in the Administrative section there is a Status field that can be set to make a traveler active or disabled. There are a few other statuses that may be available or in use:

- **Agency Review** – used for profiles created by the agency or via upload from an external system. Traveler cannot login, and profile does not sync to other systems, or SSO to online booking tools.
- **Delete** – assigned by the system after a profile has been in a disabled status for 30 days. This profile no longer shows up in Search, all credit cards and document records are deleted, and no data syncs to other systems.
- **Disable** – traveler cannot login, profile is deleted, or marked for deletion in GDS, status will change to Deleted in 30 days.
- **Security Audit** – This status is the default status for a new traveler created using self-registration or the client specific self-registration URL, however clients can choose to bypass this status and go straight to Active. Travel cannot login, profile does not sync to other systems, no SSO to online booking tools.
- **Traveler Review** – can be used when we want the traveler to be able to review and edit their profile data and sync to the GDS, but not SSO to online booking tools and profiles do not sync to online booking tools.

Updating Restricted Fields in Profolio

First Name, Last Name, Gender, DOB, Email Address, Username are all locked from editing by the traveler, as a travel manager you will have the ability to change these fields.

Adding a Travel Arranger

It is easy for a traveler to add other profiled users as their travel arranger by selecting the "Travel Arranger" menu item that is found at the top menu bar under their "<Traveler Name> Profile" menu. Users can do this themselves, or admins can do this for a user by opening their profile.

Updating Roles in Profolio

A user's role must be updated by a Travel Agent or higher. As a travel manager you will have the ability to update.

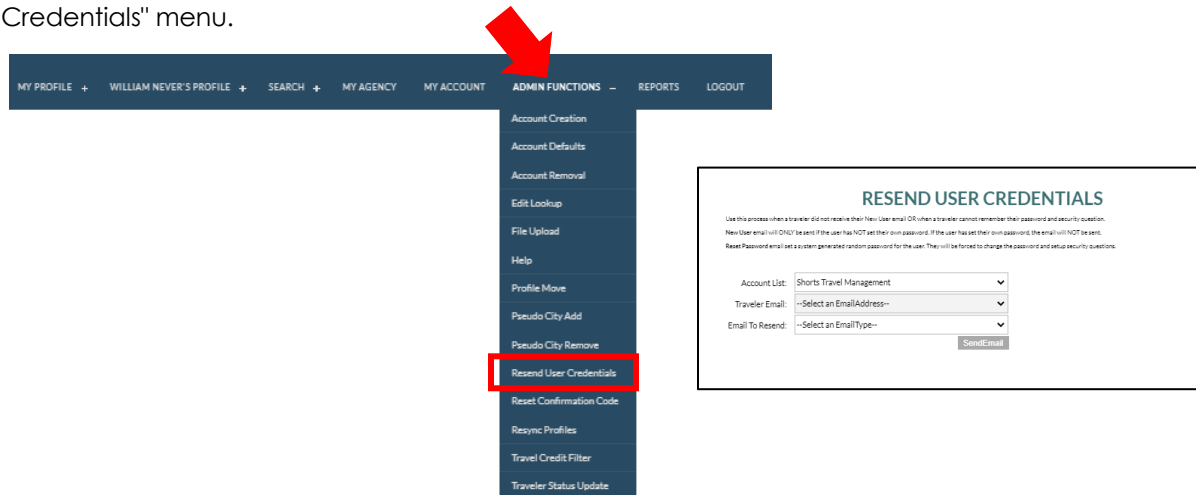Search for the user by using the instructions above.

Once you have accessed the user's profile, scroll to the "Administrative Information" section at the bottom, and use the dropdown menu to assign the new user role.

Note: Only Agency employees will have roles of Travel Agent or Agency Admin.

Profile Password Assistance for users of Deem / Profolio by ETSI

Sending Password Reset Email to User

The easiest way to help the user is to send the user a Reset Password email from Profolio. This can be done in Profolio from the 'Admin Functions' menu at the top, and then choosing the 'Resend User Credentials" menu.

Select your account, and then the Traveler, and finally an email type of 'Reset Password'; then click Send Email.

Once the user receives the email it will contain a temporary password they can use to log in and set a new password of their own choosing. It is important they use the link in the email to reset their password. If they use some other weblink the password reset may not work. If the User did not receive an email, please have them check their spam/junk folders.

Manually Setting A Temp Password

If for any reason users are unable to get the password reset email, a temporary password can be set for them. This can be done in Profolio by first finding and opening their traveler profile using the "Search", "Travelers" menu. (Searching for a User)

Once their profile is loaded, you should see a "<Traveler Name> Profile" menu, which will contain a "Change Password" menu item.
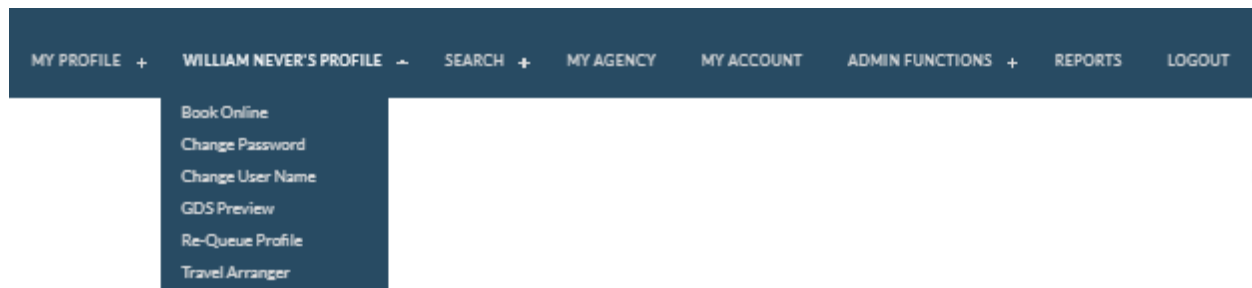
You can use this to change their password and tell them the password you've assigned. This will be a temporary password and they will need to set a new password on first login. It is important that they use this web address to reset their password: https://account.shortstravel.com After the password reset, users can go back to using their normal client login or bookmark.

NOTE: These instructions are for the user's main login password to our portal and is managed by Profolio. There is a separate Etta by Deem password that is only used for logging into the Etta by Deem mobile app, and that is reset in Deem under the user's Account menu.

HR feeds + ETSI, new users

When a new user gets added through the HR feed, they do NOT receive any notification.

For users to gain access, agents or other authorized users can send them the password reset email to gain access to their accounts, or users can be directed to select the "Forgot Password" link upon initial sign on.

You can instruct admins (aka travel managers in ETSI) to do this as well as they have new hires. A user cannot access our system until they have reset their password or had a new user email sent to them by an authorized user.