

PRODUCT INFORMATION

Policy Compliance
Manager®

Monitor Your Business Better.

Cornerstone
information systems

Introduction

Policy Compliance Manager (PCM) is a pre-trip approval application that automates the costly, labor-intensive and error-prone manual process of securing approval for travel before all reservations are ticketed and confirmed regardless of whether they are made with an agent or online. Additionally, PCM is also a communication tool that notifies the travelers of a company's policy during the reservation process leading to increased compliance.

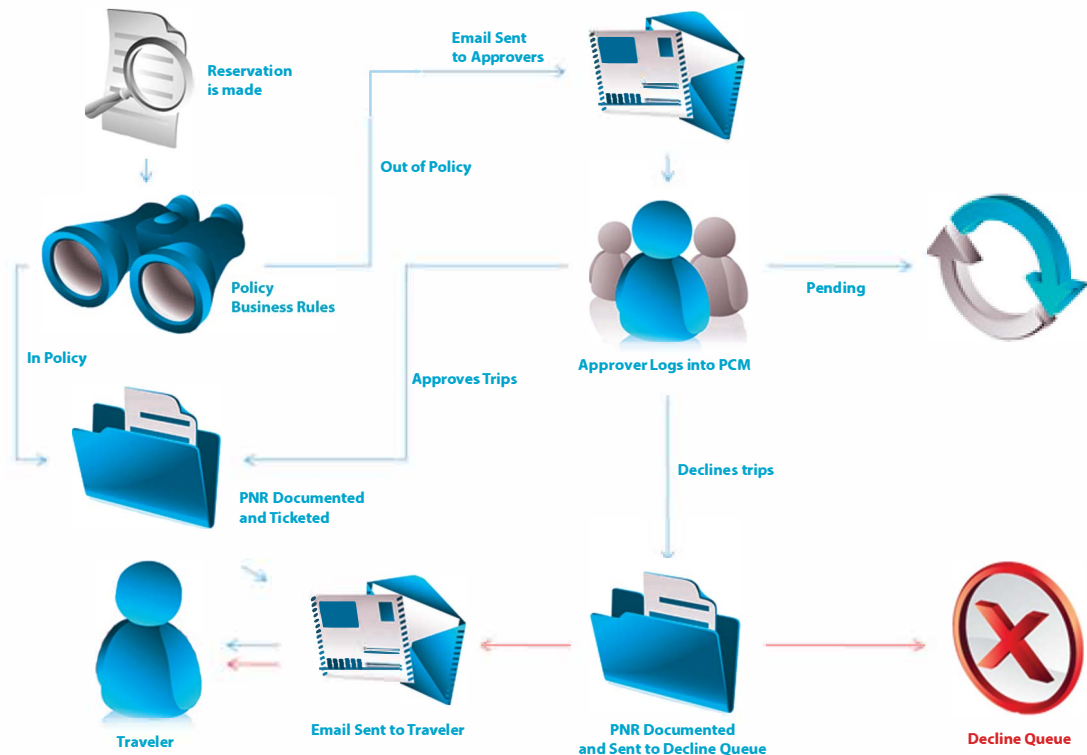
PCM can identify a virtually unlimited number of conditions that trigger the need for traveler notification and/or pre-trip approval. Email alerts are sent within minutes of booking to the company's designated approvers. The alerts include a link to a secure web site where approvers can view trip details including policy violations from any location in the world on a 24/7 basis. Approvers can authorize, deny or return reservations for further action. In addition, a complete audit trail is created so the company can be certain messages are getting to the right people at the right times.

Policy Compliance Manager makes it absolutely clear to the approver why a particular trip is non-compliant with policy and requires authorization. This ensures that corporate security and Sarbanes-Oxley requirements are met, unnecessary trips are eliminated and available preferred supplier relationships are fully leveraged.

PCM CAN HELP IF

- Trips requiring approval "fall through the cracks" during the manual review process.
- Communication delays result in higher fares and lost itineraries.
- Inaccurate trip approval documentation puts your company at risk with Sarbanes-Oxley regulations.
- Travelers and Approvers don't understand policy.
- Travelers book a high percentage of non-preferred suppliers.
- Travel to non-secure destinations is booked without knowledge of risk management personnel.

How PCM Works



It all begins with the booking being made and leads to one of three outcomes:

- the reservation being in policy,
- the reservation being out-of-policy and approved or
- the reservation being out-of-policy and declined.

An out-of-policy reservation can be placed on hold (i.e. pending) should the approver need to obtain additional information to make a decision. The pending status eventually leads to one of the two previous outcomes.

In all instances, an email can be sent to the traveler and the travel arranger notifying them of the status of the approval process. During the approval process, the PNR is always documented.

PCM Components

MESSAGING

PCM pushes e-mail alerts to the authorizer and the traveler. It not only automatically generates e-mail alerts to the authorizer advising that a trip requires their attention but it also automatically sends updates back to the traveler and travel arranger throughout the authorization process. Additionally, PCM communicates the travel policy to travelers increasing compliance and usage of preferred suppliers.

MANAGEMENT

PCM is flexible and can be configured to audit PNR's based on virtually all aspects of travel bookings and is compatible with all GDS's and online booking tools. Highly customizable business rules engine allows for defined policy parameters at 3 levels of hierarchy. There are 16 predefined configurable policy checks that typically address 80% of a company's policy guidelines and there are 4 predefined exceptions that enable flexible adherence to a company's travel policy. Reservations are automatically documented with either approval or declination remarks and if applicable, an authorization number.

If multiple level approvals is a requirement within your company, no worries PCM can easily accommodate this practice. Additionally, PCM has an auto escalation feature which means that the record will automatically advance from one authorizer to another when the 1st authorizer does not take action.

MONITORING

The travel authorizer can access a program compliance overview via a custom web site 24/7 from anywhere in the world. Authorizers can track trip status and policy adherence and produce reports summarizing program performance. This allows your company to collect data on non-compliance through monitoring and reporting. The business intelligence gained from PCM provides companies the ability to identify trends and potential causes of behaviors – this translates into actionable steps that will have a positive financial impact on the company's bottom line.

PCM also offers a personalized (mobile accessible) web site, that provides real time trip policy status, access for approval/declination and reporting on program performance.

Screenshot

From: Travel Authorizations [mailto:authorization@ciswired.com]
Sent: Tuesday, November 06, 2012 2:11 PM
To: pcmauth1
Subject: Notification for Travel Authorization



A travel request has arrived and requires your review prior to the issuance of the airline ticket.

Traveler: DRIVER/DONALD
Departure Date: 10Jan2013
Amount: 2141.40 USD
Lowest Offered: 0.00 USD
Car Amount: 185.00 USD

Reason for Travel: Business Meeting

Full Trip Itinerary:

Thursday - January 10, 2013

Carrier: AMERICAN AIRLINES

Leave:

FT LAUDERDALE,FL (FLL) 12:05 PM Number: 0711

Arrive:

CHICAGO-OHARE,IL (ORD) 2:25 PM Class: Y First

Rental Car: AVIS Daily Rate: 37.00 USD

Pickup Location: CHI-OHARE, IL Confirmation #: 36015923US6-

Return Date: January 15, 2013 Days Out: 5

Type: INTER CAR AUTO AC

Lodging: MC MARRIOTT SCHAMUBURG

CHI-OHARE, IL Confirmation # 77886412-

Check Out: January 15, 2013 Room Nights: 5

Rate: 154.00 USD

Tuesday - January 15, 2013

Carrier: AMERICAN AIRLINES

Leave:

CHICAGO-OHARE,IL (ORD) 3:35 PM Number: 0730

Arrive:

FT LAUDERDALE,FL (FLL) 7:35 PM Class: Y First

Authorize from this email:

[Approve](#) [Decline](#)

Or you may [click here](#) to login and approve or decline this trip.

iBank

Standard Checks and Exceptions

PCM is set up to allow for the configuration of any or all of the following configurable checks and exceptions for each corporate account.

CONFIGURABLE CHECKS

- First Class not allowed
- First Class flight time
- Business Class not allowed
- Business Class flight time
- Business Class may be booked for International only
- Premium Economy not allowed
- Premium Economy flight time
- Advance purchase requirements
- Maximum airfare exceeded
- Airfare is greater than lowest logical
- Air Reason Code
- International – arrival country is different than departure country
- Low-Cost Carriers
- No hotel in booking with overnight stay
- Maximum hotel rate exceeded
- Car rental size
- Car Reason Code
- Car vendor not preferred vendor
- No hotel in booking with overnight stay
- Maximum hotel rate exceeded
- Hotel Reason Code
- Online adoption – domestic or simple international was not booked online

POLICY EXCEPTIONS

- Last Minute Travel (trips booked within one business day of departure)
- Same-Day Travel
- After Hours / Weekend
- Holiday (standard holiday table)
- VIPs

CUSTOM CONFIGURATION

Travel programs are unique and built to fit a corporation's needs and desires. Your policy tool should be designed in the same way. That's why PCM allows for the set up of custom rules to fit your needs.

Automated Risk Messaging

Cornerstone's Risk Messenger is the newest offering for implementation alongside PCM. It was developed in the aftermath of the 2020 COVID pandemic crises, and is specifically engineered to help you manage and respond to disruptions on a large scale.

Send travelers automated messages regarding destination risk levels, get automated approval notifications on trips based on risk, and keep your travelers up to date on health policies before and as they travel.

For more information, please ask about Cornerstone Risk Messenger.

About Cornerstone

Cornerstone is a technology and professional services company helping more than 450 travel management companies, corporate travel departments, and online travel agencies work more efficiently and more profitably. Founded in 1992, Cornerstone has specialized in creating innovative applications that automate many of the most complex and time-intensive aspects of the reservation management process. Cornerstone is a privately held company based in Bloomington, Indiana with personnel in nine locations worldwide. More information is available at www.ciswired.com.



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