### **GRASP DATA**

### State of the Art Web-based Management Reporting Product

Recommended screen resolution 1024 x 768

(Locate on desktop under Control Panel / Display Settings)

Website: www.graspdata.com

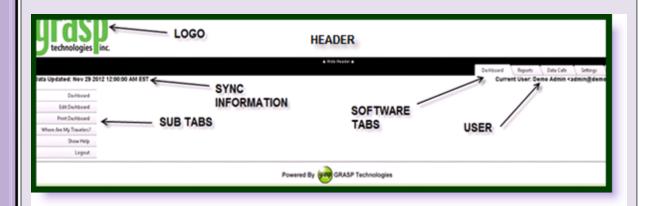


User Name: Your E-Mail Address (Example@gmail.com)

Password: XXXXXXXX (Eight Characters)

Forgot Password? Contact <a href="mailto:support@grasptech.com">support@grasptech.com</a> or your

Company Administrator.



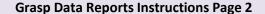
### Overview

- Ad Hoc Reporting
- Automated Scheduling
- o Personalization of Library Searches
- User Defined Each User Has Individual Set-Up
- o HTML5 iPad, iPhone And Android Viewable

### Logo

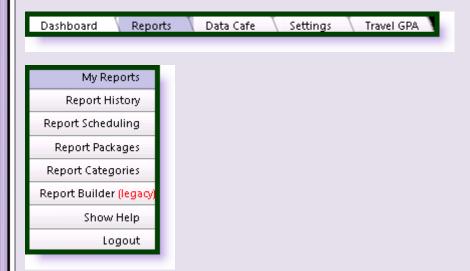
- o Provided By Client During Implementation
- Preferred Type And Size: 300 DPI jpeg
- Logo Stored In Settings Agency
- Logo Located In The Same Location On All Tabs (Upper Left)

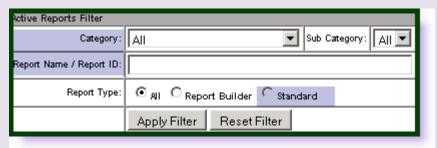
Grasp Data Reports Instructions Page 1 – Continues on Page 2



### Sync Information

- Automated Sync Runs Nightly, US Eastern Standard Time
- o Located Upper Left (Below Logo) On Each Tab
- o Controls Importing Of Data From The Back Office
- o Verifies Incoming Data And Updates Records That Have Been Changed
- Optional: Automated Hourly Sync (Additional \$\$)
- Optional: Manual Sync (See Data Cafe Data Import)

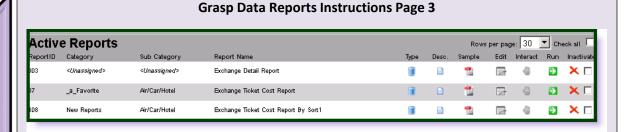




### My Reports

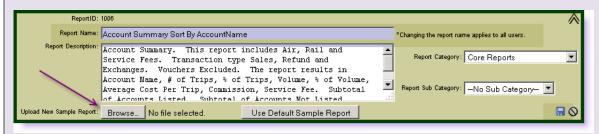
- Library Alphabetized By Report Name
- Standard Reports = Library Canned Reports
- Search By Key Word (Recommend Use Of Single Words)
  - Report Name / Report ID
  - Enter Word (Example: Exchange)
  - Hit Enter OR Apply Filter
- Search By Report ID
  - Report Name / Report ID
  - Enter Report ID (Example: 1029)
  - Hit Enter OR Apply Filter
- Report Tab View Setting Per User

Grasp Data Reports Instructions Page 2 - Continues on Page 3



### Active Reports

- Report ID (Unique Report Number)
- Category (See Page For Category Tab)
- Sub Category (See Page For Sub Category Tab)
- Report Name (See Directly Below For Details)
- Type = Icon Symbol Of A Can
- Description (See Directly Below For Details)
- Sample (See Page 4)
- Edit (Not An Active Icon In Standard Reports)
- Interact (Not An Active Icon In Standard Reports)
- Run (See Page 4-5)
- Delete ("X" Permanently Deletes Report From Library)
- Inactive (See Page 9)



### Report Name

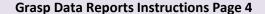
- Name Provided By Report Writer
- Left Click On Report Name
- Ability To Globally Change Report Name
- Save Disk (Bottom Right Corner)



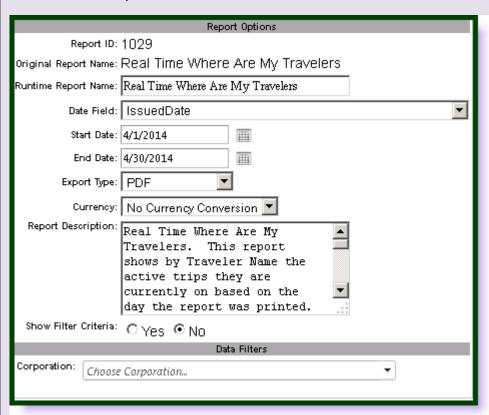
### Report Descriptions

- Report Name Given By Writers
- Booking Type Included On The Report
- Transaction Type Included On The Report
- Report Fields In The Order They Appear On The Report
- Calculations And / Or Field Definition
- Ability To Add / Delete Description Information
- Globally Personalize Description (Example: Replaces IB Report 3030)

Grasp Data Reports Instructions Page 3 - Continues on Page 4

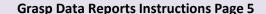


- Report Samples
  - Based On Demo Data
  - Provides Visual Sample Of Final Report
  - Not Available on All Reports
  - Ability To Globally Load Report Samples And Reset To Default Sample
- Run Report



- Part 1: Report Options
  - o Report ID
    - Follows Report Thorough Process
  - o Original Report Name
    - Name Currently Displayed In Report Name Field
  - o Runtime Report Name
    - Free Form Field
    - Name Appears In Report Header
    - One-Time Run Name Change
  - o Date Field
    - Issue Date
      - Date Invoice Or Ticket Was Issued In The Back Office
      - Tramada: Issue Date = Create Date
    - Departure Date
      - Date Leaving Origin City

Grasp Data Reports Instructions Page 4 – Continues on Page 5



- Vendor Payment Date
  - Date Booking Was Closed In The Back Office With A Vendor Payment
- Return Date
  - Date Of Last Leg Of The Itinerary
- Segments Arriving Or Departing Between (Segments Only)
  - Only Returns Segments That Are Between The Dates
     Selected

Example: Booking With 6 Segments – 3 Between 4/1 And 4/5 - 3 Between 6/10 And 6/12

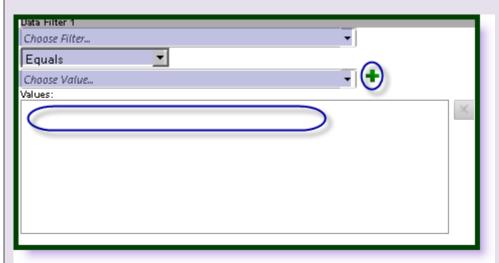
If Date Selection Is 4/1 - 4/5 Then The Results Will Show Only 3 Segments

- Segment Arrive Date (Segment Only)
  - See Segments Arriving Or Departing Between (Segments Only)
- Segment Depart Date (Segment Only)
  - See Segments Arriving Or Departing Between (Segments Only)
- Segments Arriving Or Departing Between (Bookings Only)
  - Returns All Segments Where Any Of The Segments Fall Within The Date Range
  - o Returns Full Trip / Booking
- Segments Arriving Or Departing Between (GDS)
  - o Requires GDS Feed (Add-on Product)
  - Bookings Only
- On The Road
  - **Bookings Only**
  - All Segments Where Any Segment Falls Within The Date Range Selected
  - Includes Cars and Hotels
- On The Road (GDS)
  - Requires GDS Feed (Add-On Product)
  - See On The Road
- Client Payment Date
  - Date Booking is Closed In Back Office With A Client Payment
- Booking Date
  - o Available For Tramada, Globalware, Travcom, Trams
  - o Available For Sabre and GDS Feeds
- Start Date
- Pop-Up Calendar
- Free Flow Date Fields
- End Date
- Pop-Up Calendar
- Free Flow Date Fields

**Grasp Data Reports Instructions Page 5 Continues On Page 6** 

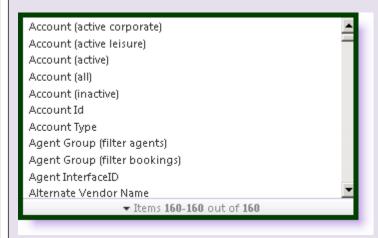


- Export Type
  - PDF
  - Excel
    - o PDF Dropped Onto Excel Spreadsheet
    - All Functionality Of Excel
    - Contains PDF Sorting, Subtotals, Headers, Footers
  - Excel Data Only
    - o Report Raw Data
    - No Sorting, Subtotals, etc.
  - Word
  - Rich Text
  - XML
- Currency
- Converts Report From Native Currency To Selected Currency
- Add-On Option
- Report Description
  - Follows Through Reporting Process
  - Ability To Edit
  - One-Time Run Change
- Show Filter Criteria
  - Yes
- First Page Summary Of Report Options And Filters
- No
- Report Begins On First Page
- Corporation
  - Drop Down Selection
  - First Choice Always "All"
  - Selection Field Begins Sorting Immediately Upon Typing
- Run Now



- Part 2: Add Data Filters (Optional)
  - o Five Filter Areas Available
  - Filter From Top To Bottom (1-5)

**Grasp Data Reports Instructions Page 6 Continues On Page 7** 



- o Choose Filter
  - Back Office Booking Table
  - Alphabetical
  - Selection Field Begins Sorting Immediately Upon Typing
- Operation Selection
  - Equals
  - Greater Than
  - Greater Than Or Equal To
  - Less Than
  - Less Than Or Equal To
  - Like
  - Not Equal
  - Not Like



- Choose Values
  - Select Results From Drop Down Box
  - Selection Field Begins Sorting Immediately Upon Typing
  - Click Green Plus Sign (IMPORTANT)
  - If Multiple Results Required Hit Green Plus Sign After Each Selection
- Run Now

**Grasp Data Reports Instructions Page 7 Continues On Page 8** 

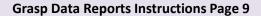
# REPORTS

### **Grasp Data Reports Instructions Page 8**

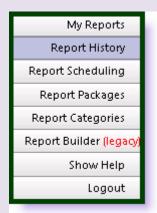
Report Distribution								
From:	From: melinda@grasptech.com							
Subject:	Reports Generated by Grasp WebReporting							
Message:	Hello! Attached to this email are reports generated by Grasp Technologies' WebReporting system.							
Recipients:	☐ Melinda Eudy  melinda@grasptech.com							
	☐ Trish  trish@grasptech.com							
New Contact Name:								
New Contact Email:								
	Add Contact							
Send Reports As:	Attach copies of reports     Web links to reports							
Options:	☐ Only email when reports are generated.							
yourself in the	o receive a copy of this email, please check email recipient list. When emailing multiple ether or not you include yourself), you will always of this email.							

- Part 3: Add Distribution (Optional)
  - o From
    - Defaults To User That Is Logged In
    - Ability To Change E-mail Address
  - Subject
    - Pre-Filled With Generic Subject
    - Free Form Edit
  - Message
    - Pre-Filled With Generic Message
    - Free Form Edit

**Grasp Data Reports Instructions Page 8 Continues On Page 9** 



- Recipients
  - One Time Name Load
    - o Enter New Contact Name
    - Enter New Contact Email
    - Click Add Contact
  - Ability To Edit Name
  - Ability To Delete Name From List
  - Ability To Select Multiple Recipients
  - Recipient List Unique To Each User
- Send Reports As
  - Attach Copies Of Reports
  - Web Links To Reports
    - o Available For Six Months Or
    - o If Report Is Deleted From History Tab
- Options
  - Only Email When Reports Are Generated
    - Does Not Email Report If Results Are "No Data" Or "Failed"
- Run Now
- Inactivate
  - Remove Report From Active Report List



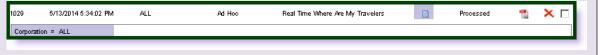


### Report History

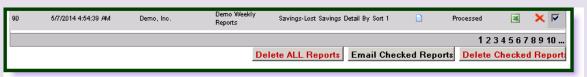
- List Of User Run Reports
- Maintains Report In History For Six Months
- o Current Report On Top
- Ability To Set Number Of Reports Per Page
- Option To Email Reports Directly From History Tab

**Grasp Data Reports Instructions Page 9 Continues On Page 10** 

- Run Date Filter (1)
  - Filter By Date Range To Locate Reports In History
  - Reset Filter For View Of All Reports In History
- o Report Auto Refresh Interval (2)
  - User Selection Of Refresh Intervals To Meet Their Preferences
    - o 5 Seconds
    - o 15 Seconds
    - o 30 Seconds
    - o 60 Seconds
    - o 90 Seconds
    - o Never
  - Option To Manually Refresh By Selecting "Refresh Now"
- o Rows Per Page (3)
  - User Selection Of The Number Of Reports Viewed Per Page
    - o 10 Reports
    - o 20 Reports
    - o 30 Reports
    - o 40 Reports
    - o 50 Reports
    - o 100 Reports
- Historical Reports (4)
  - Report ID (Followed From My Reports Tab)
  - Run Date
    - Date And Time (Eastern Standard)
  - Corporation
  - Batch (Ad Hoc When Not Run In Scheduling)
  - Report Name (Runtime Report Name)



- Filter Criteria
  - List Of Filters Used
- Status
  - o Queuing
  - Running
  - Processed
- View
- Delete ("X" Permanently Deletes Report From Report History)



- Delete All Reports
  - Permanently Remove Reports From Report History
- Checked Reports Options
  - Email Checked Reports (Opens Report Distribution See Page 8-9)
  - Delete Checked Reports

**Grasp Data Reports Instructions Page 10 Continues On Page 11** 

### My Reports Report History Report Scheduling Report Packages Report Categories Report Builder (legacy) Show Help Logout

### **Grasp Data Reports Instructions Page 11**



### Report Scheduling

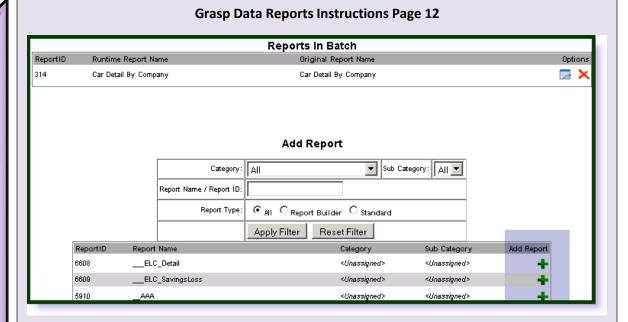
- o Batches Specific To User
- o Add Batch (1)



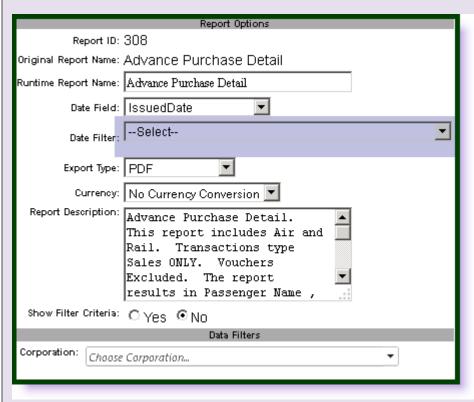
- Create Batch Name
  - Be Specific With The Name
  - State Time Period Daily, Weekly, Monthly
  - o State Corporation Used In Batch
- Save Batch
- o Batch ID Assigned (2)
  - Computer Generated Batch ID
- o Batch Icons (3) See Details Beginning Page 12
  - Edit Icon
  - Scheduler/Distribution
  - Copy
  - Run
  - Distribution
  - Delete
- Checked Batch Option (4)
  - Delete Checked
    - o Permanently Remove Batch From Report Scheduler
  - Run Checked See Details On Page

All Scheduled Reports Run Into Report History Tab (See Page 9-10)

**Grasp Data Reports Instructions Page 11 Continues On Page 12** 



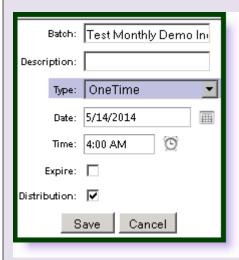
- Edit Icon
  - o Add Reports To Batch
    - Search for Report (See Page 2)
    - Click Green Plus Sign At End of Report Line

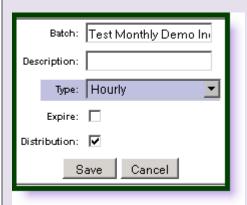


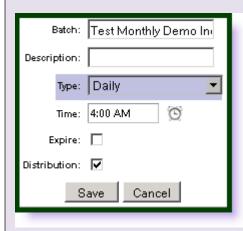
- Follow Directions on Page 4 -7
- Date Filter
  - Current Periods
  - Future Periods
  - Previous Period
- Save

**Grasp Data Reports Instructions Page 12 Continues On Page 13** 

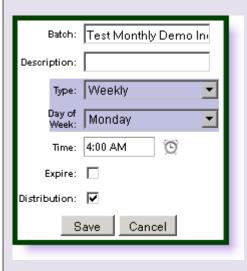
- Repeat Process For Each Report
- Save Batch
- Scheduler/Distribution Icon

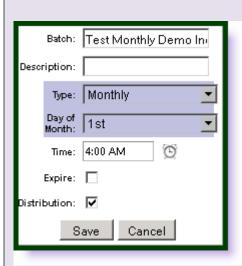


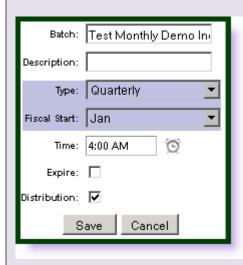




**Grasp Data Reports Instructions Page 13 Continues On Page 14** 

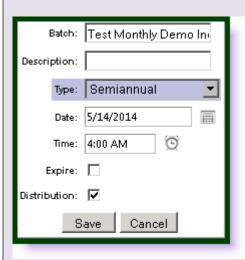






**Grasp Data Reports Instructions Page 14 Continues On Page 15** 

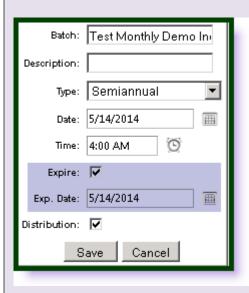




- o Date
- o Time
  - Reports Run Eastern Standard Time
  - Manually Change Date OR
  - Clock Pop-Up



**Grasp Data Reports Instructions Page 15 Continues On Page 16** 



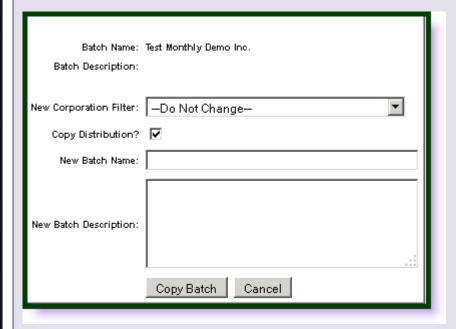
### o Expire

- Schedule Batch To Automatically Stop
- Useful For Groups, Special Batches
- Ability To Change Date At Anytime
- Ability To Remove Expiration

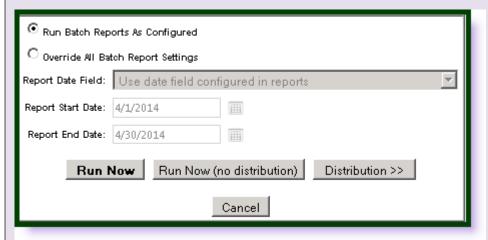


o Distribution (See Page 8-9)

**Grasp Data Reports Instructions Page 16 Continues On Page 17** 



- Copy Icon
  - New Corporation Filter
  - o Copy Distribution, If Clicked
  - New Batch Name
  - Copy Batch



- Run Icon
  - Run Batch As Configured
    - Run Now
      - o Runs Exactly As Scheduled
  - Run Now (No Distribution)
    - Runs Into Report History Only
  - Distribution
    - Adjust Distribution For This Run Only

**Grasp Data Reports Instructions Page 17 Continues On Page 18** 

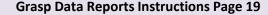
## Run Batch Reports As Configured Override All Batch Report Settings Report Date Field: Use date field configured in reports Report Start Date: 4/1/2014 Report End Date: 4/30/2014 Run Now Run Now (no distribution) Distribution >> Cancel

- Run
  - Override All Batch Report Settings

**Grasp Data Reports Instructions Page 18** 

- Report Date Field (See Definitions Page 4-5)
  - o Issue Date
  - Departure Date
  - Vendor Payment Date
  - o Return Date
  - Segments Arriving Or Departing Between (Segments Only)
  - Segment Arrive Date (Segment Only)
  - Segment Depart Date (Segment Only)
  - Segments Arriving Or Departing Between (Bookings Only)
  - Segments Arriving Or Departing Between (GDS)
  - On The Road
  - On The Road (GDS)
  - Client Payment Date
  - Booking Date
- Start Date
  - Pop-Up Calendar
  - Free Flow Date Fields
- End Date
  - o Pop-Up Calendar
  - Free Flow Date Fields
- Run Now (No Distribution)
  - Runs Into Report History Only
- Distribution
  - Adjust Distribution For This Run Only
- Distribution Icon (See Page 8-9)
- Delete Icon ("X" Permanently Deletes Batch)

**Grasp Data Reports Instructions Page 18 Continues On Page 19** 

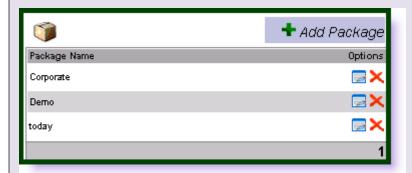


- Checked Batch Option (4)
  - Delete Checked
    - o Permanently Remove Batch From Report Scheduler
  - Run Checked See Details On Page 17-18



- Copy Distribution To User
  - Use This Option With Copy Checked To User And Move Checked To User
- Copy Checked To User
  - Check Boxes Next To Batch
  - Select Name From Drop Down Box
  - Click Copy Checked To User
- o Move Checked To User
  - Check Boxes Next To Batch
  - Select Name From Drop Down Box
  - Click Copy Move Checked To User

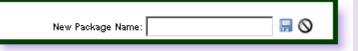
My Reports
Report History
Report Scheduling
Report Packages
Report Categories
Report Builder (legacy)
Show Help
Logout



### Report Packages

- Used In Settings Edit Users (See Settings Instructions)
- o Ability To Change Package At Any Time
- Alphabetized Reports List
- Ability To Build Unlimited Number Of Report Packages
- No Size Limit To Report Package

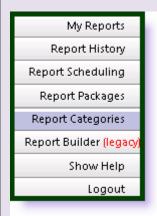
**Grasp Data Reports Instructions Page 19 Continues On Page 20** 



- Name Package
- Save Disc



- Select Report One At A Time
  - Click Arrow To Right
- Select Multiple Reports
  - o Highlight Report Name
  - Hold Down Ctrl Key
  - Select Next Name
  - Click Arrow To Right
- Save Disc
  - o Click Arrow To Right



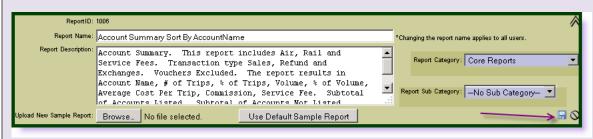
### Report Categories

- Used On My Reports Tab
- o Ability To Use Pre-Named Categories Or Create New Categories
- o No Limit To Number Of Categories
- Ability To Build Unlimited Number Of Report Packages
- o No Size Limit To Report Package

Grasp Data Reports Instructions Page 20 Continues On Page 21

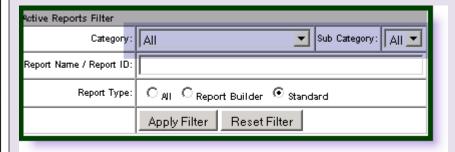


- New Category
  - Create Category and Hit Green Plus Sign
- Rows Per Page
  - Number of Categories Seen On Each Page
- Category List
- Delete Category
  - "X" Permanently Deletes Batch
- o Reassign Deleted Category Reports
  - Drop Down Box Allows You To Select Category

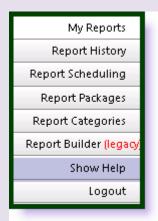


- Name Provided By Report Writer
- Left Click On Report Name
- Ability To Globally Change Report Category and Sub Category
- Save Disk (Bottom Right Corner)

**Grasp Data Reports Instructions Page 21 Continues On Page 22** 



- Search Reports By Category
- Most Used Reports In One Place
- Ability To Categorize By User Type (Example: Sales)
- Save Time Searching For Multiple Reports
- Also Use In Report Scheduler



### Show Help

- Help Menu Available Fort The Following Tabs
  - My Reports
  - Report History
  - Report Scheduling
  - Report Packages
  - Report Categories
- Click on The Tab You Need The Help In (Example: Report History)
- o Click On Show Help
- o A Help Menu Will Appear At The Top Of The Page



o To Remove Help Menu – Click Hide Help

Grasp Data Reports Instructions Page 22 Review Questions On Page 23

Grasp Data Report Review Questions Page 2
---

<b>*</b>		b would you use to view your report history?
<b>*</b>	•	e-mail reports from the Report History tab?
<b>*</b>	Are Cate	egories user defined or global to the database?
<b>.</b>	Δην μις	r can see your scheduled reports?
•	•	YES
		NO NO
<b>*</b>	Name th	ne five tabs in Reports.
	0	
	0	
	0	
	0	
	0	
*		does the sync information appear on the report screen?
	0	
<b>*</b>		does the user information appear on the report screen?
*	For wha	t reason would a user place items on the dashboard screen?
	0	
	0	
	0	
<b>*</b>	Help is a	available for each of the tabs on the report screen?
	0	YES
	0	NO
<b>*</b>	Name th	ne six exports available for printing your report?
	0	
	0	
	0	
	0	
	0	
	0	

**Grasp Data Dashboard Review Questions**