

GRASP DATA SETTINGS

State of the Art Web-based Management Reporting Product

Recommended screen resolution 1024 x 768

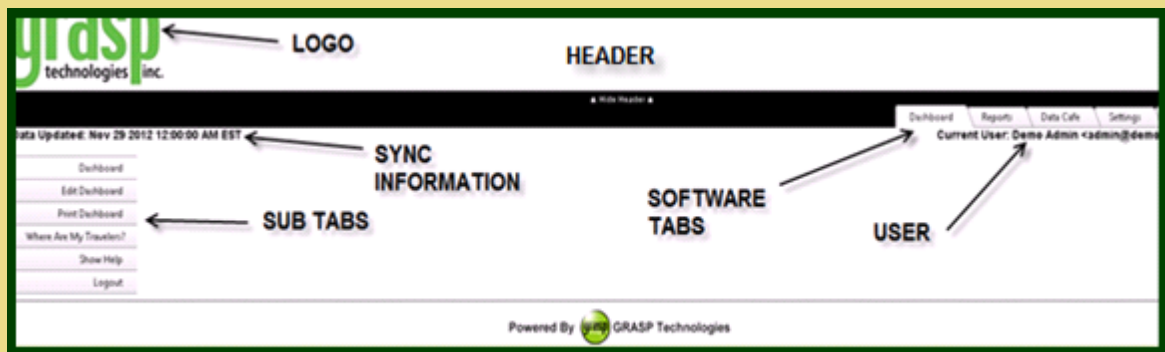
(Locate on desktop under Control Panel / Display Settings)

Website: www.graspdata.com

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

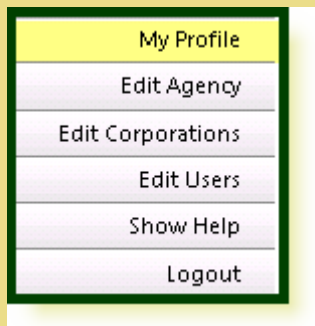
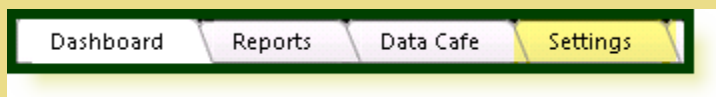
Password: XXXXXXXX (Eight Characters))

Forgot Password ? Contact support@grasptech.com or your Company Administrator.



- **Overview**
 - Manage Corporations
 - Manage Value Add Options
 - Restrict User Data Access
 - Restrict Reports Per User

SETTINGS



○ Overview

- One – Time Load Of Corporation List During Implementation
- Agency Options Include User Login On Agency Website
- Value Add Options Per Corporation For Building Packages
- Restriction Of Data Access Per User
- Restriction Of Reporting Access Per User

○ Sync Information

- Automated Sync Runs Nights, US Eastern Standard Time
- Located Upper Left (Below Logo) On Each Tab
- Optional: Automated Hourly Sync (Additional \$\$)
- Optional: Manual Sync (See Data Cafe – Data Import)

❖ My Profile


- User Information That Can Be Updated/Changed
 - First Name
 - Last Name
 - Password
 - Email Address
 - Currency (If Add-On Purchased)
- Update User

SETTINGS

My Profile
Edit Agency
Edit Corporations
Edit Users
Show Help
Logout

Agency Management	
Agency	Demo Agency
Address	1000 Demo Avenue
City	Demo
Zip	99999
Phone Alt	
Email	demo@grasptech.com
Address 2	
State	CA
Phone	999-99-9999
Fax	
URL	

- **Edit Agency**
 - Agency Management
 - Agency Address, City, State, Zip, Phone, And Contact Email
 - Save At Bottom of Page

Modify Branding	
Header Logo	
 GRASP Data	
Report Logo	
Background Graphic	
Header Logo	<input type="button" value="Browse..."/> No file selected. <input type="button" value="Upload"/> <input type="button" value="Reset"/>
Report Logo	<input type="button" value="Browse..."/> No file selected. <input type="button" value="Upload"/> <input type="button" value="Reset"/>
<i>*Note: The report logo must be a JPEG image.</i>	
Header Background	<input type="button" value="Browse..."/> No file selected. <input type="button" value="Upload"/> <input type="button" value="Reset"/>
Style Sheet	<input type="button" value="Browse..."/> No file selected. <input type="button" value="Upload"/> <input type="button" value="Reset"/>
<input type="button" value="Download Style Sheet Template"/>	

- Agency Branding
 - Provided By Client During Implementation
 - Preferred Type And Size: 300 DPI jpeg
 - Branding Can Be Modified By Uploading New Logo
- Browse
 - Locate Logo File On Computer
- Upload
- Save At Bottom Of Page

Options

General

☒ Redirect to agency URL on logout?
 This is useful when users are accessing this reporting system from your agency website and you want the user to be redirected back to your agency website on logout.
 (This effects ALL agency and corporation users.)

Agency branded login URL:

This URL will direct users to a login screen that is branded with your agency logo. This screen will take up the full browser window.

Embedded login URL:

This URL is useful if you want to embed the login screen into your website. Please contact GRASP Technologies to implement this feature.

- Options
 - Redirect To Agency URL On Logout
 - When User Logs Out – Views Agency Website
 - Provides Agency With Branding Opportunity
 - Agency Branded Login URL
 - Directs Users To Login Screen That Is Full Browser Window
 - Embedded Login URL
 - Agency Adds URL To Website With Icon
 - User Directed To Agency Website For Login
 - When User Logs Off – Views Agency Website
 - Maximum Branding Opportunity
- Save At Bottom Of Page

Options Can Be Implemented At Any Time

My Profile
Edit Agency
Edit Corporations
Edit Users
Show Help
Logout

Corporation Filter	
Search Criteria:	<input type="text"/>
<input type="button" value="Apply Filter"/>	<input type="button" value="Reset Filter"/>

[+ Add Corporation](#)

❖ Edit Corporations

- Add New Corporation

Corporation Management	
Corporation <input type="text"/>	
Address <input type="text"/>	Address 2 <input type="text"/>
City <input type="text"/>	State <input type="text"/>
Zip <input type="text"/>	Phone <input type="text"/>
Phone Alt <input type="text"/>	Fax <input type="text"/>
Email <input type="text"/>	URL <input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

- Enter Corporation Name
- Large Character Field – No Need to Truncate Name
- Reporting Name Equals The Name In This Field
- Do Not Fill In Remaining Fields
- Save

CompanyID	Corporation	Options
1	Demo, Inc.	

EDIT BOX


- Locate Company Name In Alphabetical List
- Open Edit Box To Finish Setting Up The Corporation

SETTINGS

Modify Branding	▼
Settings	▼
Define Sorts	▼
Account Setup Use Group Code or manually add Accounts From Drop-Down list.	▼

Modify Branding

Header Logo


GRASP Data

Report Logo

Background Graphic

Header Logo

No file selected.

Report Logo

No file selected.

Header Background

No file selected.

Style Sheet

No file selected.

**Note: The report logo must be a JPEG image.*

- Agency Branding
 - Provided By Client
 - Preferred Type And Size: 300 DPI jpeg
 - Branding Can Be Modified By Uploading New Logo
 - Can Provide Client Reports To Client With Their Own Logo
 - Available For All Clients Per Set-Up
- Browse
 - Locate Logo File On Computer
- Upload
- Save At Bottom Of Page

❖ Settings

Settings

- ☒ Show Data Cafe (accessible via the top main menu).
- ☒ Show option to allow voids in Data Cafe > Data Inquiry page.
- ☐ Enable Where Are My Travelers webpage for ALL corporate users?
- ☐ Enable Travel GPA?
- ☐ Enable Report Builder?

- Settings Options Selected Per Client Set-Up
- Can Be Added Or Removed At Any Time
- Easy To Use – Click Box Selection

❖ Define Sorts

Define Sorts

Sorts are used for providing additional information on reports (for example, a corporate department). Any reports that utilize sorts will show the information you define below.

The configuration fields below represent the following:

Sort Label	This is the name of your custom data and will appear on reports. For example, "Department", "Cost Center" etc.
UIDID Number	This number represents the UIDID (TRAVEL/Comment Line (Global/Free Form Field (TravCOM)) to use as a sort field.
Start Position	This represents where to start extracting data from the custom field. Start Position starts at 1, not 0. This field works in conjunction with the "Length" field.
Length	This represents the total amount of data to extract from the custom field. This field works in conjunction with the "Start Position" field. For example, say you define UIDID 29 as a custom field and its value consists of "abodefg". If you define "Start Position" = 2 and "Length" = 3, the data extracted will be "ode".
Delimiter Character(s)	This represents the character(s) to use to break up the data in a custom field. This is an OPTIONAL field.
Delimiter Position	This represents the position in the data pieces to use as the custom field. It works in conjunction with the "Delimiter Character(s)" field. This is an OPTIONAL field.

How to define the custom field to use:

- To define a sort for a UIDID/Comment Line/Free Form Field, set the "UIDID" field to the correct UIDID/Comment Line/Free Form Field number.
- To define a sort for Client Remarks, set the "UIDID" field to 0.
- To define an account name as a sort, set "UIDID" field to 999.
- To define a department sort, leave the "UIDID" field empty.
- To define a division sort (TravCOM only), set "UIDID" to -1.
- To define a purchase order sort (TravCOM only), set "UIDID" to -2.

Sort 1 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 2 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 3 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 4 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 5 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 6 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 7 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 8 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 9 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position
Sort 10 Label	UIDID Number	Start Position	Length	Delimiter Character(s)	Delimiter Position

- Sorts Are Used To Provide Additional Information On Reports
- Sorts Option Selected Per Client Set-Up
- Can Be Added Or Removed At Any Time
- Information Added On This Tab Would Be Updated On The Reports During The Next Sync
- Report Names That Include "By" Or "With" Sort # Would Use The Corporation Sort Set-Up
 - Part 1 – Definition Of Fields And Suggestions On Use

Grasp Data Settings Instructions Page 8

- Part 2 – How To Define Custom Fields Such As:
 - UDID's
 - Client Remarks
 - Account Name
 - Department
 - Division
 - Purchase Order
- Part 3 – Sort Set-Up
 - Up To 10 Sorts Available Per Client
 - Each Client Set-Up Unique
 - Sort Label
 - Label That Appears On Reports
 - UDID Number
 - Define Per Instructions in Part 2
 - Start Position
 - Always Equal To "1"
 - Length
 - Maximum Length of Field
 - Delimiter Character
 - Character Used To Separate Fields Information
 - Delimiter Position
 - Position In Fields Where Information Starts
- **Save**

Example:

If Using Client Remarks And The Fields Appears In Back Office:


1523-Non Air-John Smith

- ✓ Sort 1 Label = "Employee Number"
- ✓ UDID Number = "0"
- ✓ Start Position = "1"
- ✓ Length = "4"
- ✓ Delimiter Character = "-"
- ✓ Delimiter Position = "1"


- ✓ Sort 2 Label = "Booking Type"
- ✓ UDID Number = "0"
- ✓ Start Position = "1"
- ✓ Length = "15"
- ✓ Delimiter Character = "-"
- ✓ Delimiter Positions = "2"

- ✓ Sort 3 Label = "Employee Name"
- ✓ UDID Number = "0"
- ✓ Start Position = "1"
- ✓ Length = "20"
- ✓ Delimiter Character = "-"
- ✓ Delimiter Position = "3"


Account Setup Use Group Code or manually add Accounts From Drop-Down list.


Group Code: 

If a group code is added above, you are not required to manually add accounts.
Any new accounts added to a group will be added below automatically with the data sync.


Find Account: 

Enter account name or interface ID for specific account(s). Leave blank to return all accounts.

Add Account: 




- ABC Company 10493 (06001) *INACTIVE*
- ABC Company 16625 (08001) *INACTIVE*





❖ Account Set-Up By Group Code

- Group Code
 - Enter Group Code Used In Back Office
 - Click Blue Disk To Save
- Account Names
 - Automatically Entered On Next Sync
 - Hit Green Plus Sign
 - Saves Time In Account Name Loading


Account Setup Use Group Code or manually add Accounts From Drop-Down list.

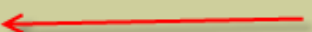
Group Code: 

If a group code is added above, you are not required to manually add accounts.
Any new accounts added to a group will be added below automatically with the data sync.


 Find Account: 

Enter account name or interface ID for specific account(s). Leave blank to return all accounts.

Add Account: 



- ABC Company 1 (Missing ID) *INACTIVE*
- ABC Company 12 (006005) *INACTIVE*
- ABC Company 174 () *INACTIVE*
- ABC Company 175 () *INACTIVE*
- ABC Company 176 () *INACTIVE*
- ABC Company 177 () *INACTIVE*
- ABC Company 178 (006001)
- ABC Company 179 () *INACTIVE*
- ABC Company 180 (007003) *INACTIVE*
- ABC Company 181 (007001)



❖ Account Set-Up By Group Without Group Code

- Find Account
 - Type In Account Name
 - Hit Green Arrow
- Add Account
 - Highlight Account Name From Drop Down Box
 - Hit Green Plus Sign
 - Repeat Until All Accounts Appear In White Box


Example:


- ✓ Company Jackhammer has 3 Branches – High, Low, and Middle
 - ✓ Company Set-up Name Jackhammer – High
 - ✓ Account Set-Up: JH High
 - ✓ Company Set-up Name Jackhammer – Low
 - ✓ Account Set-Up: JH Low
 - ✓ Company Set-up Name Jackhammer – Medium
 - ✓ Account Set-Up: JH Medium
 - ✓ Company Set-up Name Jackhammer Combined
 - ✓ Account Set-Up: JH High AND JH Low AND JH Medium


Account Setup Use Group Code or manually add Accounts From Drop-Down list.

Group Code:

If a group code is added above, you are not required to manually add accounts.
Any new accounts added to a group will be added below automatically with the data sync.

Find Account: 

Add Account: 



❖ Individual Account Set-Up

- Find Account
 - Type In Account Name
 - Hit Green Arrow
- Add Account
 - Highlight Account Name From Drop Down Box
 - Hit Green Plus Sign

A vertical menu with the following options: My Profile, Edit Agency, Edit Corporations, Edit Users (highlighted in yellow), Show Help, and Logout.

A button with a green plus icon and the text '+ Add User'.

❖ Edit Users

- Restriction Of Data Access Per User
- Restriction Of Reporting Access Per User
- Use For Internal Employees
- Use For Agency User Logins

The 'Add User' form contains the following fields and options:



- Corporation: A dropdown menu currently showing 'None'.
- First Name: A text input field.
- Last Name: A text input field.
- Login: A text input field.
- Password: A text input field.
- Phone: A text input field.
- Phone Alt: A text input field.
- Email: A text input field.
- User Type: Two radio buttons, 'User' (selected) and 'Admin'.
- Currency: A dropdown menu currently showing 'No Currency Conversion'.
- Email user login information?: A checkbox that is currently unchecked.
- Save: A button at the bottom right.

- Select Corporation That User Will Have Access To
If User Will Have Access To All Corporation – selection “None”
- Enter First Name
- Enter Last Name
- Login = Email Address


***Note Email Address Can Be Used Only Once In The System

Grasp Data Settings Instructions Page 12

- Password = 8 Character Field
If User Is Loaded By Grasp Support = password1
- Email Address = Same As Login
- User Type =
User = User Can Read And Use Options Selected By Administrator
Admin = Admin Can Set-Up Users, Set-Up Corporations, Update Information
- Email User Login Information?
 - This Will Send The User An Email With The Following Information:
 - URL To login On
 - Login Information
 - Password
- No Need For Separate Email To User
- One Step Process
- Save

UserID	First Name	Last Name	Corporation	Role	Options
3305	Melinda	Eudy		Agency Admin	 

- Locate User Name In Alphabetical List
- Open Edit Box To Finish Setting Up The User

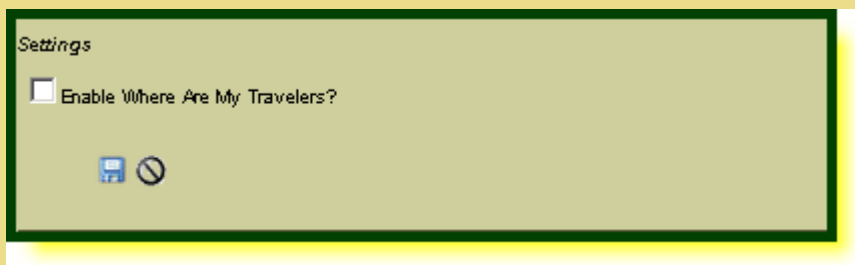
3305 Eudy Last Name <input type="text" value="Eudy"/> Login <input type="text" value="melinda@grasptech.com"/> Phone <input type="text"/> Email <input type="text" value="melinda@grasptech.c"/> 	Melinda First Name <input type="text" value="Melinda"/> Password <input type="password" value="*****"/> Phone Nt <input type="text"/> Currency <input type="text" value="No Currency Conversion"/>	Agency Admin
Report Assignment		
Settings		

- Update Password
 - Password = 8 Character Field
 - Click Save Disk

3305 Eudy Report Assignment Report Packages <input type="text" value="--All Reports--"/> No reports to assign.	Melinda Eudy's Reports <div> <input type="button" value=""/>>> <input button"="" text"="" type="button" value="ELC_Detail"/> <input type="text" value="ELC_SavingsLoss"/> <input type="text" value="AAA"/> <input type="text" value="Air Vendor"/> <input type="text" value="TestReport"/> <input type="text" value="1-Vendor"/> <input type="text" value="1-AIR"/> <input type="text" value="A.A.A"/> <input type="text" value="A Agent Detail Pivot"/> <input type="text" value="A Agent Summary Pivot"/> </div>	Agency Admin
Settings		

- Report Assignment
 - Select Report Package (See Reporting Tab Instructions)
 - Click Double Arrows To right

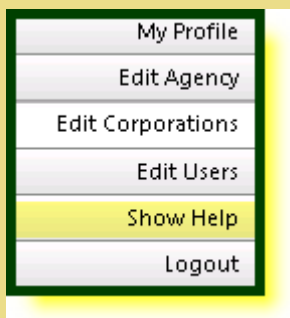
SETTINGS



- Settings
 - Admin – Access Automatic Set-Up For Where Are My Travelers
 - User – Selection Box Under Settings per User For Where Are My Travelers



- Resend User Login
 - Admin Login Needed
 - Do Not Have To Reset Password
 - Click on Envelope
 - System Automatically Send Email To User With URL, Login And Password Information.



❖ Show Help / Hide Help

- My Profile Tab
 - This Page Allows You To Update Your Contact and Login Information
- Edit Agency Tab
 - This Page Allows You To Update Your Agency's General Information, Contact Information and Branding
- Edit Corporations Tab
 - This Page Allows You To Add, Edit And Delete A Corporation. You Can Edit A Corporations' Contact and Address Information, Branding, Sorts And Account Set Up By Clicking on the Edit Icon. You Can Delete A Corporation by Clicking on the "X" Icon. To Add A New Corporation, Click On The Add Corporation Icon
- Edit Users
 - This Page Allows You To Add, Edit, And Delete A User. To Edit A User's Personal Information, Contact Information And Report Assignment Click On The Edit Icon. To Delete A User, Click On The "X" Icon. To Email A User Their Login Information, Click On The Envelope Icon. To Add A New User, Click On The Add User Icon Link

Review Questions Continues on Page 14

SETTINGS

- During implementation of Grasp Data, is it possible to have your client list loaded into the Edit Corporation tab?
 - YES
 - NO
- When setting up a corporation, can you limit access to different tabs in the software?
 - YES
 - NO
- ❖ If the corporation asks for their own logo on the report, can you do this?
 - YES
 - NO
- ❖ If yes to the question above, where would you go to add the logo?
 - _____
 - _____
 - _____
- ❖ How many total sort fields are available per corporation?
 - _____
- ❖ Your user login and _____ are the same?
- ❖ If you forget your password you need to contact who?
 - _____
- ❖ If you embed the URL, where would this be located?
 - _____
- ❖ What is the preferred Logo size?
 - _____
- ❖ Who do you contact for help ?
 - support@grasptech.com