

## How To Create Reports

Trip Manager has several ways to gather data and create reports. Being able to create reports requires the user to have special authority that the regular traveler doesn't have.

You can tell if you have the privilege of making reports by the items that appear in the tabs across the upper part of the Trip Manager screen after you log in. You will see a tab marked "Administration". If you click on that tab and see the item "Reports" below it, then you can create reports.

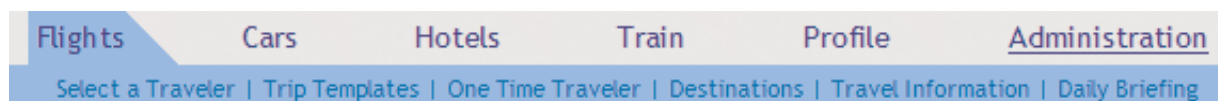
If you don't see those items, contact Reasons Travel to request the authority to create reports.

### Log in

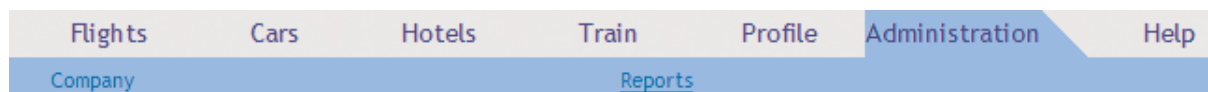
Go to [www.TripManager.com](http://www.TripManager.com) and log in.

### Locating the reports page

Click on the Administration tab.



Click on the Reports link.



Now the Reports page appears.

## A Trip Manager How To

### The Reports page

Depending on what authority you have been granted you may see all of the choices below, or only a few of them.

The screen below explains what each reports does.

View All	Reports
<a href="#">Traveler Flight Summary</a> <a href="#">Traveler Trip Detail</a> <a href="#">Company Adoption</a> <a href="#">Profile Upload Error</a> <a href="#">Custom Traveler</a>	<p><b>View All</b> provides a list of all available reports.</p> <p><b>Traveler Flight Summary Report</b> shows the percentage of trips submitted for purchase, how many trips have been created, how many times availability has been checked and how many reservations were made by traveler.</p> <p><b>Traveler Trip Detail Report</b> provides comprehensive air, car and hotel information by traveler. Details for individual trips are provided. Helps determine if travelers are using Trip Manager for all aspects of their reservation. Assists with determining if duplicate bookings have been made.</p> <p><b>Company Adoption Report</b> displays Trip Manager usage by all or a selected company. Provides a detailed access report for every traveler within the selected company.</p> <p><b>Profile Upload Error Report</b> is used by travel professionals and assists with correcting profile information being uploaded to Worldspan.</p> <p><b>Custom Traveler Report</b> provides a way to gather information by using fields found in traveler profiles. The administrator selects fields to be displayed on for the report.</p>

The first three (Flight Summary, Trip Detail, and Company Adoption) work similarly so I'll show how to use one as an example (under Basic Reports, below). The Custom Traveler is very different and is explained separately below.

### View All

If you click on **View All**, you simply get the same page without the descriptions, as shown below.

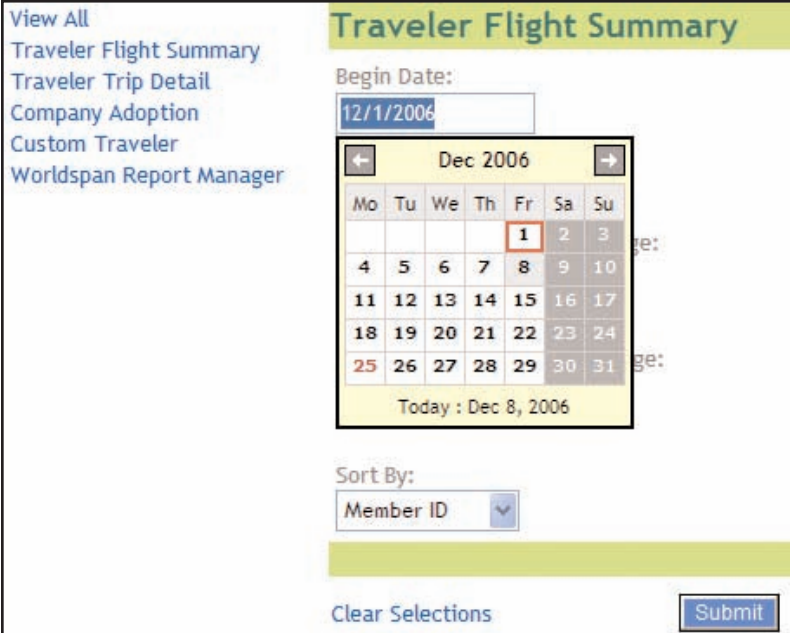
View All	View All Management Reports
<a href="#">Traveler Flight Summary</a> <a href="#">Traveler Trip Detail</a> <a href="#">Company Adoption</a> <a href="#">Custom Traveler</a> <a href="#">Worldspan Report Manager</a>	<a href="#">Traveler Flight Summary</a> <a href="#">Traveler Trip Detail</a> <a href="#">Company Adoption</a> <a href="#">Profile Upload Error</a> <a href="#">Custom Traveler</a>

## Basic reports

### Step 1, choosing a date range and sorting method

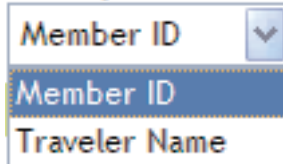
Click on the link (the phrase “Traveler Flight Summary” either in the left-hand menu or in the text)

Choose a **Begin** and **End Date** for your report. You can type in a date or you can click on the date and a calendar pops up. You can use the arrows to move from month to month, and then click on a date to choose it.



Under **Sort By** you can choose to have the list of names in the report sorted alphabetically either by Member ID (such as ALINCOLN) or by their actual name (such as Lincoln, Abraham).

Then you click on the **Submit** button.

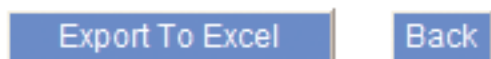


### Step 2 look at the report

At the top of the report are two buttons.

**Report to Excel** saves the report as an Excel file (I’m not sure but I believe you need to have the Excel program on your computer for this to work).

**Back** returns to the previous screen.



The following report is brief, but it will give you an idea of what you get in the Flight Summary.

## A Trip Manager How To

<div style="text-align: right;"> <a href="#">Export To Excel</a>    <a href="#">Back</a> </div>									
Company:		GENMAR			Begin Date:		12/1/2006		
Today's Date:		12/8/2006 5:51 PM			End Date:		12/8/2006		
Member ID	Member Name	All Searches	Reserve	Air Search	Purchase Ticket	Purchase Ticket%	Air Segments	Car Days	Hotel Nights
TALBERTS	Alberts, Trevis	2	1	8	1	50.00%	12	3	0
DANDERSEN	Andersen, Douglas	1	0	3	0	0.00%	0	0	0
JBARSNESS	Barsness, Jeffrey	1	1	2	1	100.00%	4	2	0
RBLAKE	Blake, Robert	3	2	2	1	33.33%	2	3	0
BCARLSON	Carlson, Brett	1	1	9	1	100.00%	2	18	0
DAFFY	Duck, Daffy	4	2	6	2	50.00%	4	6	2
KFLINN	Flinn, Kelly	1	1	1	0	0.00%	2	0	0
BGRIGSBY	Grigsby, Bridget	1	1	2	1	100.00%	2	0	0
NGROVER	Grover, Nathan	1	0	5	0	0.00%	0	0	0
AHALL	Hall, Aaron	1	1	2	1	100.00%	4	0	0
RLEEMHUIS	Leemhuis, Robert	1	1	1	1	100.00%	3	0	0
KMITCHELL	Mitchell, Keith	1	1	1	1	100.00%	5	0	3
RPURGIEL	Purgiel, Ron	1	0	3	0	0.00%	0	0	0
GROHR	Rohr, Gregory	2	1	0	0	0.00%	0	0	1
DSAVALOJA	Savaloja, Daniel	1	1	1	1	100.00%	2	0	0
JSCHROEDER	Schroeder, Jeffrey	2	0	4	0	0.00%	0	0	0
DSCHUETTE	Schuette, Daniel	2	0	1	0	0.00%	0	0	0
JSWING	Swing, John	1	0	2	0	0.00%	0	0	0
GWHITLOW	Whitlow, Gary	1	1	0	0	0.00%	0	0	2
<b>Total:</b>	<b>(19 users)</b>	<b>28</b>	<b>15</b>	<b>53</b>	<b>11</b>	<b>833.33%</b>	<b>42</b>	<b>32</b>	<b>8</b>

Sample Traveler Flight Summary report

## A Trip Manager How To

### Traveler Trip Detail Report

Below is shown part of the report as seen in Trip Manager. After that the same report as seen in Excel (saved by clicking the Export to Excel button). This report gives specific details on every trip every employee has taken.

One handy item: if you click on the Description (the name of the itinerary such as DCA 12/10/2006), Trip Manager will open that itinerary for you (as shown in miniature to the right).



Traveler Trip Detail Report					
		<a href="#">Export to Excel</a>		<a href="#">Back</a>	
Company:		GENMAR	Begin Date:		12/1/2006
Today's Date:		12/8/2006 7:20 PM	End Date:		12/8/2006
Member ID	Name	Description	Air Fare (USD)	Car Days	Hotel Nights
AHALL	Hall, Aaron	<a href="#">DCA 12/10/2006</a>	\$422.19	0	0
		1	\$422.19	0	0
BCARLSON	Carlson, Brett	<a href="#">RSW 1/22/2007</a>	\$469.61	6	0
		1	\$469.61	6	0
BGRIGSBY	Grigsby, Bridget	<a href="#">ATL 1/11/2007</a>	\$218.60	0	0
		1	\$218.60	0	0

Traveler Trip Detail report as it appears in Trip Manager

	A	B	C	D	E	F
1						
2		Company	GENMAR		Begin Date	12/1/06
3		Today's Date	12/8/06 19:20		End Date	12/8/06
4						
5	Member ID	Name	Description	Air Fare- (USD)	Cars Days	Hotel Nights
6						
7	AHALL	Hall, Aaron	DCA 12/10/2006	\$422.19	0	0
8						
9			1	\$422.19	0	0
10						
11	BCARLSON	Carlson, Brett	RSW 1/22/2007	\$469.61	6	0
12						
13			1	\$469.61	6	0
14						
15	BGRIGSBY	Grigsby, Bridget	ATL 1/11/2007	\$218.60	0	0
16						
17			1	\$218.60	0	0

Traveler Trip Detail report as it appears in Excel

## A Trip Manager How To

### Company Adoption Report

Shown below is part of a company adoption report. It lists all employees and their usage of Trip Manager.

Company Adoption Report									
<a href="#">Export To Excel</a>					<a href="#">Back</a>				
Company:		GENMAR			Begin Date:		12/1/2006		
Today's Date:		12/8/2006 7:29 PM			End Date:		12/8/2006		
Member ID	Member Name	All Searches	Reserve	Air Search	Purchase Ticket	Purchase Ticket%	Air Segments	Car Days	Hotel Nights
TALBERTS	Alberts, Trevis	2	1	8	1	50.00%	12	3	0
DANDERSEN	Andersen, Douglas	1	0	3	0	0.00%	0	0	0
JBARSNESS	Barsness, Jeffrey	1	1	2	1	100.00%	4	2	0

### Custom Traveler report

The Custom Traveler report is quite different from the other reports.

Every profile in Trip Manager has settings or text in it. Some are obvious, such as a first and last name, email address, and work address. There are settings for type of seat desired (window or aisle), what credit card to use to pay for hotel rooms, or who you chose as your travel planner.

Those are all settings the regular traveler/member can see. What they don't see is that there are hundreds of settings that only the administrator can see and set or edit. Things like if the member can edit or create profiles or create reports.

A PDF file with a list of all the possible settings and fields is at [http://www.reasonstravel.net/public/search\\_options.html](http://www.reasonstravel.net/public/search_options.html)

### **Overview**

Step 1 is choosing which travelers to include in the report. You choose which ones by picking one or more settings. For instance, you can choose travelers by area code. Or you can not choose any particular settings and that means you are choosing all the travelers.

Step 2 is where you choose how the setting in step 1 is filled in. For instance, you can choose only the travelers whose area code is 612.

Step 3 is where you choose what information about those travelers you wish to see in the report. For instance, you could choose email addresses. So in my example, you can get a report which has all the email addresses for members who are in the 612 area code.

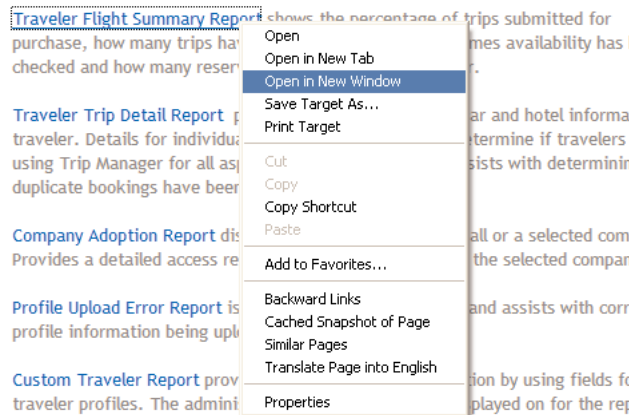
Step 4 is where you choose how to sort the list. For instance, you can alphabetize by last name or member ID.

## A Trip Manager How To

### Important note

After you have gone through all the steps to create this report, you will find the Back button doesn't work. You have your report, but to continue you'd have to log in again. To avoid that, right-click on the link for the Custom Traveler Report link and select "Open in new window" (shown to right). Then you can create the report and still go back to the list of reports in the original window. Doing this just saves time, especially if you are experimenting or making more than one report.

View All provides a list of all available reports.



Right-click and choose  
Open in New Window

## Step-by-step in more detail

### If you want to include all members in your report

#### Step 1

Simply click on the **Next** button (selecting no individual fields).

#### Step 2

Click on **Next** again.

### If you want to select some members, but not others

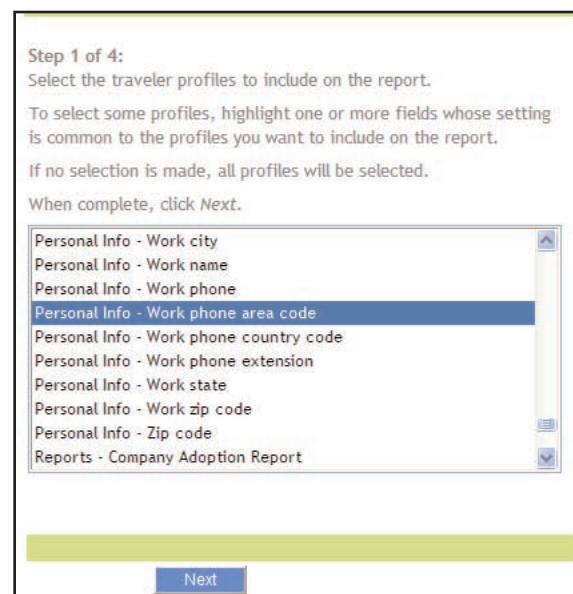
#### Step 1

Choose which members to include by choosing fields.

Choose a **single** field by clicking on it in the list.

Choose a **range** of fields (fields that are next to each other) by clicking on the first field and then hold the shift key and click on the last one.

Choose **multiple** separate fields, one at-a-time, by holding the Control key as you click on each field's name in the list.



## A Trip Manager How To

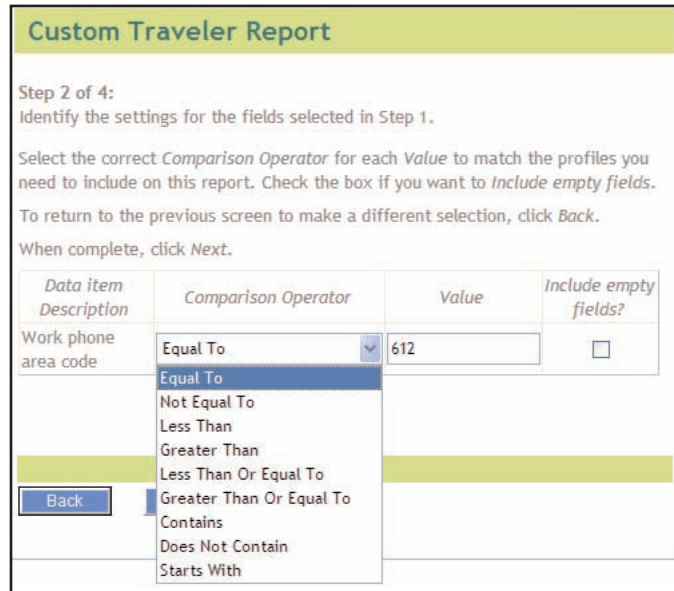
As mentioned earlier, a list of all these options can be found at [http://www.reasonstravel.net/public/search\\_options.html](http://www.reasonstravel.net/public/search_options.html)

Then click on the **Next** button.

### Step 2

Select a “Comparison Operator”. In this case I chose “Equal to” as I just want the profiles which have area codes “equal to” 612. But I could have chosen “Not Equal To” and then I would be choosing all the members whose area code is not 612.

If you put a check mark under “Include empty fields” you will also get the people who didn’t have any area code in their profile.



**Custom Traveler Report**

Step 2 of 4:  
Identify the settings for the fields selected in Step 1.

Select the correct *Comparison Operator* for each *Value* to match the profiles you need to include on this report. Check the box if you want to *Include empty fields*.

To return to the previous screen to make a different selection, click *Back*.

When complete, click *Next*.

Data item Description	Comparison Operator	Value	Include empty fields?
Work phone area code	Equal To	612	<input type="checkbox"/>

Back

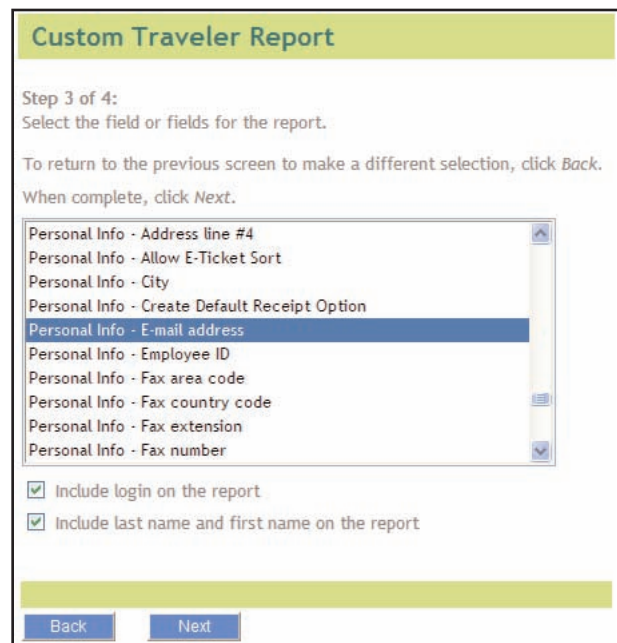
Click **Next** to continue, or **Back** to return to Step 2.

### Step 3

Choose the fields whose information you want in your report.

Use the same selection methods as described in Step 1 (above).

Click **Next** to continue, or **Back** to return to Step 2.



**Custom Traveler Report**

Step 3 of 4:  
Select the field or fields for the report.

To return to the previous screen to make a different selection, click *Back*.

When complete, click *Next*.

- Personal Info - Address line #4
- Personal Info - Allow E-Ticket Sort
- Personal Info - City
- Personal Info - Create Default Receipt Option
- Personal Info - E-mail address
- Personal Info - Employee ID
- Personal Info - Fax area code
- Personal Info - Fax country code
- Personal Info - Fax extension
- Personal Info - Fax number

Include login on the report

Include last name and first name on the report

Back Next

## A Trip Manager How To

### Step 4

Here you decide how to organize the report.

Put a check mark by the field you want to sort by. In the example (right) I am sorting by Last name.

Then select a number for each field. This will be the order of the columns in the report, from left to right.

You can enter a title for the report.

Click on Help (at the top right of the screen – not shown here) for information on the other options.

Click **Next** to generate the report, or **Back** to return to Step 3.

### Custom Traveler Report

**Step 4 of 4:**  
Verify the list and order of fields to be displayed on the report.

Choose *one* field to sort the data. Click the box to the left of that field.

Choose the order you want the fields to display from left to right in the report by assigning values. The field assigned as "1" shall be the first column to display at the left margin. The field assigned "2" comes next. Assign "3" to the field you want to appear next. Assign a value to all fields.

Sort By	Column Heading	Column #
<input type="checkbox"/>	Member ID	3
<input checked="" type="checkbox"/>	Last name	2
<input type="checkbox"/>	First name	1
<input type="checkbox"/>	E-mail address	4

Report Title:

Report Options:  
 View the report on screen.  
 Save these settings as report title and view the report on the screen.

Make this report visible to others in the company:

Back
Submit

The resulting report will look something like this (info changed to protect the innocent):

612 email addresses			
First name	Last Name	Member ID	E-mail address
Daffy	Duck	DDUCK	daffy@stinkpot.com
Abraham	Lincoln	ALINCOLN	abe.lincoln@stinkpot.com
Mark	Zincup	MZINCUP	zincup@stinkpot.com

Sample Custom Traveler Report

Notice the area codes are nowhere to be seen! They were just used to **select** members. In step three I chose email addresses and that (aside from the members' names) is all that the report shows.

Anyway, this is a brief description of what one can do in Custom Traveler Reports. No doubt you will discover greater, more marvelous and useful ways to put this to work for you. It is the maestro's one true desire that the pupil outdo the master.