GLOBAL BUSINESS TRAVEL

Insights User Guide

FEBRUARY 2024

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About This Document

The Insights User Guide describes the basic steps needed to create and manage travel-related reporting for Amex GBT clients. This document is not intended to be an exhaustive resource, but to provide the high level steps to get started. Additional support is noted in the Support section of this document.

This User Guide is organized into the following sections:

Chapter 1 **Logging into Insights**	This chapter explains how to log into Insights.
Chapter 2 **Creating and Managing the Dashboard Homepage**	This chapter explains the initial set up steps to create and organize your Insights Dashboard Homepage.
Chapter 3 **Running a Dashboard on Demand**	The chapter describes how to configure Insights according to your needs. You can establish default settings for time, date, currency and other standard details. You will set the modules that are visible each time you log into Insights. Finally, you can set other user preferences, as well as review your company settings that were determined during implementation.
Chapter 4 **Viewing Reports**	In this chapter, you will learn how to locate and run existing and scheduled reports. You will also be shown how to download and delete reports as needed.
Chapter 5 **Building a Report**	This chapter will show you how to build a new report from scratch or use an existing templated to create a new report.
Chapter 6 **Running a Report**	In this chapter, you will continue the steps of building a new reports and end with the process of running the report.
Chapter 7 **Savings a Report**	This chapter will cover how to save a report once you have received the results.
Chapter 8 **Managing Report Results**	The last chapter will review the steps available to manipulate and revise a report to add/delete components and other activities to optimize your reports.

Program Care Support

Call GBT Program Care if you need agent assistance to resolve an issue with Insights. Support is available 24 hours a day, Monday-Friday.

Please Note: Specialists are available to provide technical and consultative support with Insights but are not able to create or provide reports.

Email: AtYourServiceAmericas@amexgbt.com

Phone: NA - 646-817-9960, Option 2

AU - 61-2-9112-0480, Option 2

SG - 65-6723-1287, Option 2

GB - 44-20-3788-3651, Option 2

Product Feedback

Share your observations, quality concerns, or questions about Insights. We sincerely value your comments and read every message you send us. Feedback can be sent via email to **PremierInsightsSupport@amexgbt.com.** Please note that this mailbox is reviewed intermittently. For timely support, please call or email Program Care using the details noted above.

Insights User Guide

Log Into Insights

1. Navigate to Amex GBT Insights by clicking: https://access.amexgbt.com.
2. Enter your work email address and click “Next”.
3. For your first login you will need to set a new password by clicking “Forgot Password” and following the instructions.
4. Once you are logged in, you will be able to access Insights reporting from the top navigation bar.

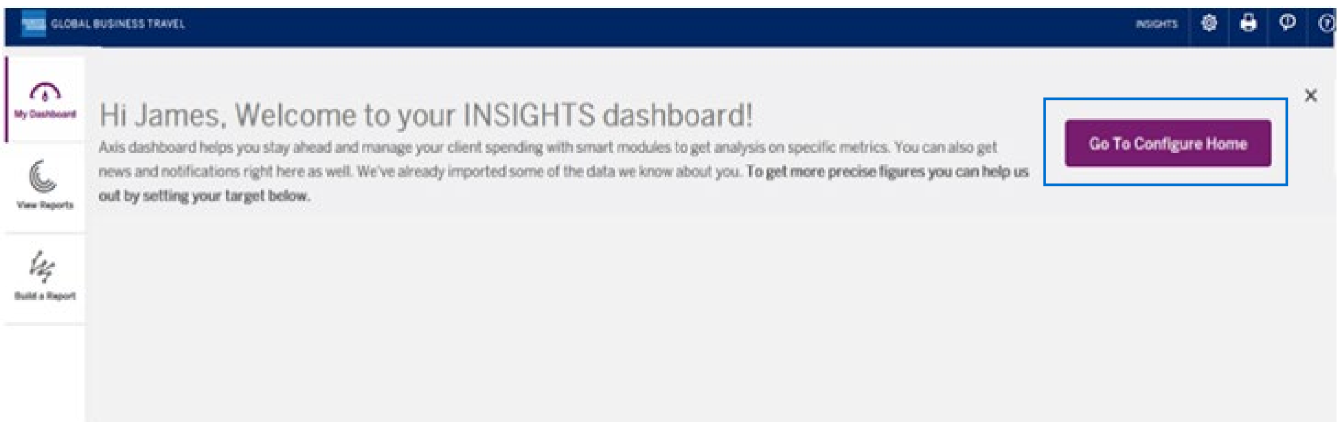
For a video with details on how to access Insights, visit:
https://explorer.amexglobalbusinesstravel.com/GBT-Acct-Info-Hub-Insights.html

Create and Manage the Dashboard Homepage

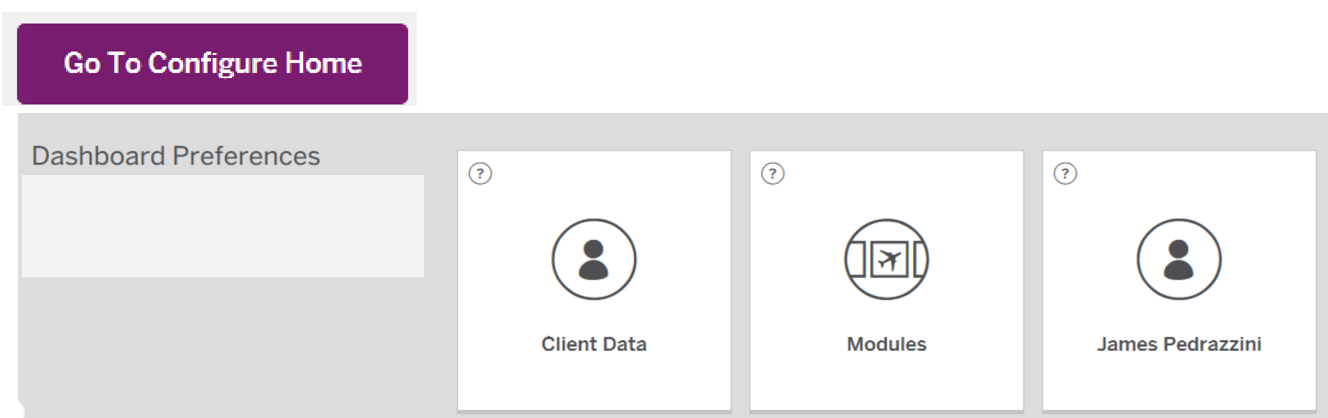
When you first log into Insights, you will be presented with the Dashboard Homepage. By clicking the **Go To Configure Home** button, you will be able to configure the Insights global settings, select which modules you would like to see on the homepage and configure those modules to meet your specific needs.

Note: Whether you configure the homepage for the first time, or make edits in the future, the system will reflect the changes immediately on the Dashboard Homepage. (Data is available after the 20th of the month for the previous month's data).

Click **Go To Configure Home** to make edits to set your dashboard preferences:



Below is a screen shot of the **Go To Configure Home, Dashboard Preferences** dialog box:



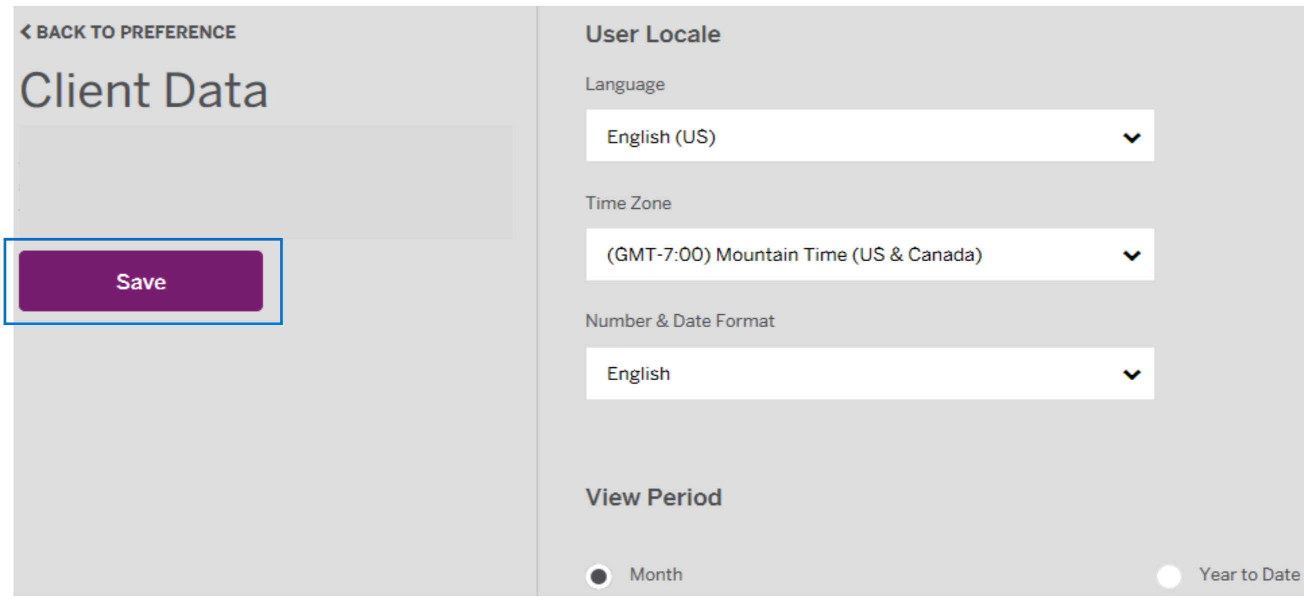
Throughout the **Dashboard Preferences** dialog box (above), you must save changes within each section before moving to the next section. If you move to another section without clicking the **Save** button, your changes will not be reflected on your homepage.

See below for details of each tab within the Dashboard Preferences dialog box:

Dashboard preferences – client data:

Change settings for:

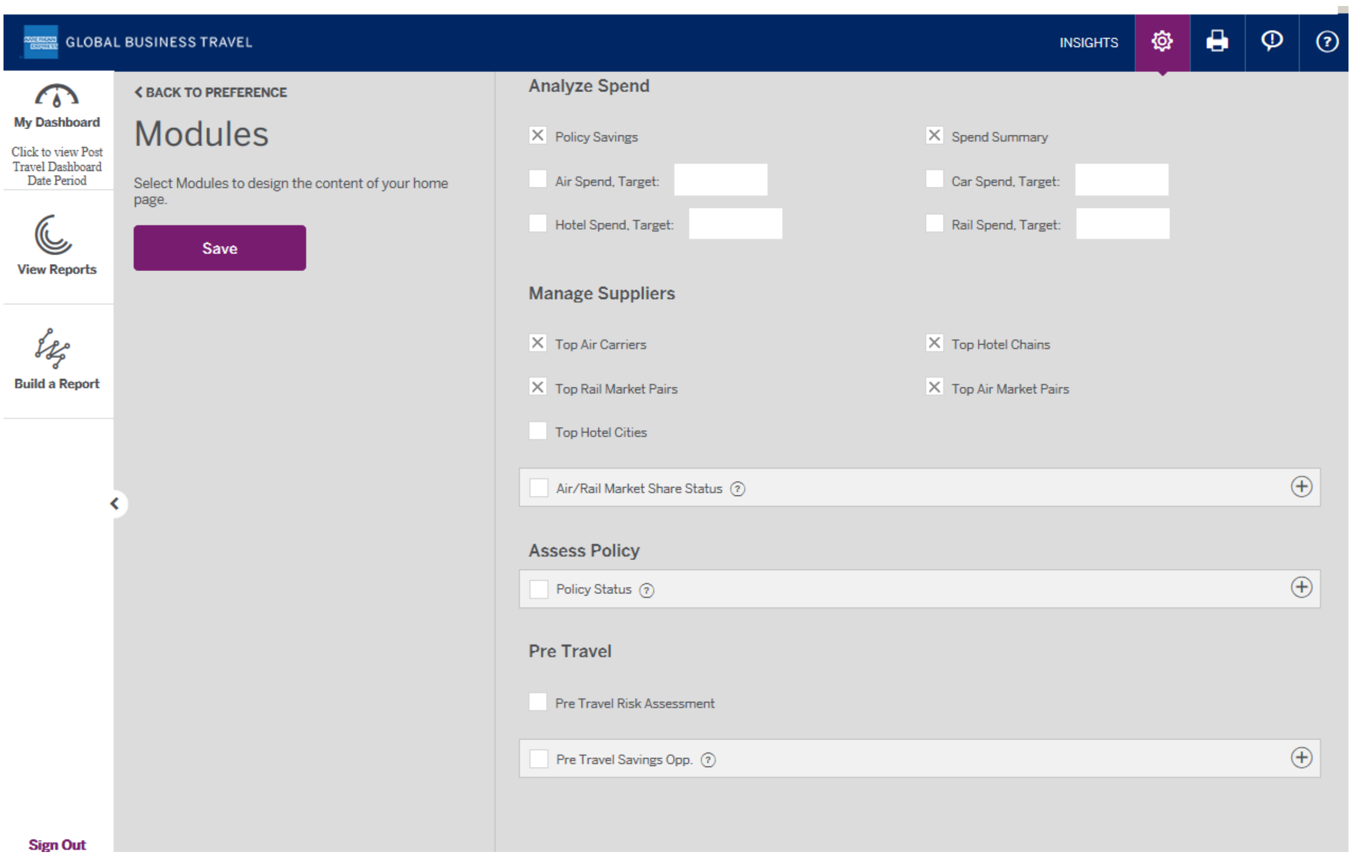
- Language
- Time Zone
- Number
- Date formats
- View Period



Dashboard preferences – modules:

Change settings for:

- Analyze Spend
- Manage Suppliers
- Assess Policy
- Pre Travel



- In the Modules section, you can configure your homepage to show only the modules that are relevant for your needs
- Users have access to the Pre and Post Travel panels ONLY if they have access to the data, based on their country-data capability and their product subscriptions.
- The homepage enables users to set performance targets and compare program metrics against their target values to provide an overview of the performance of the entire program. You can set targets for:
  - Spend
  - Air/Rail Market Share Status
  - Policy Status
  - Pre Travel Savings Opportunity

Dashboard preferences – user/client data:

You can customize each of these sections to filter your report data. Once configured, these selections will apply to all modules for that data type.

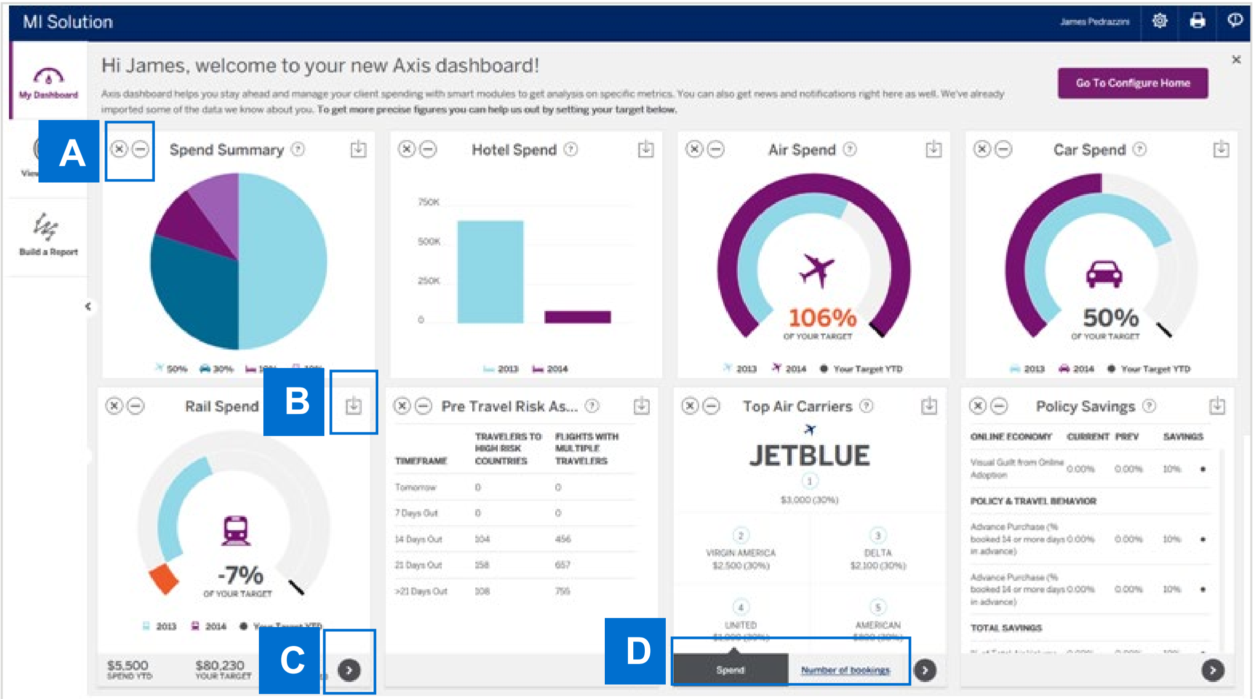
The following fields can be configured on each tab of the Configure Home dialog window:

Post travel filters	
Basic Criteria	**Advanced Filters**
• Client ID • Currency • Fiscal Period • Region • Country (Point of Sale) • Client-Defined Hierarchy (if applicable)	• Account/DK Number • Client-Defined Fields • Statement Information

Pre travel filters	
Basic Criteria	**Advanced Filters**
• Client ID • Time Period • Country • Savings Opportunity • Preferred Vendors • High-Risk Countries • Multiple Travelers on Same Flight • Client-Defined Hierarchy (if applicable)	• Account/DK Number • Client-Defined Fields • Statement Information

Benchmarking	
Basic Criteria	**Advanced Filters**
• Client ID • Time Period • Country • Savings Opportunity • Preferred Vendors • High-Risk Countries • Multiple Travelers on Same Flight • Client-Defined Hierarchy (if applicable)	• Account/DK Number • Client-Defined Fields • Statement Information

See below for an example of the customized dashboard based on the dashboard preferences set:



Once configured, the panels can be positioned anywhere on the screen by clicking on a module and dragging it to the desired location.

A. Click the X to remove the module, or the – to minimize the module
B. Click download button to download the module as a picture file or print
C. Click this button to drill down to further detail
D. Some modules allow you to toggle between different views (i.e. spend or bookings)

Running a Dashboard on Demand

Dashboards direct you to the detail you will need to perform the first step in data analysis.

To run a dashboard:

1. Click **Build a Report**
2. From the “I want to build…” change the ‘All Types’ to **Dashboards List** from the dropdown menu.
3. Select the type of dashboard you wish to run

You will be prompted to answer questions on 2 tabs to configure the dashboard via the dashboard building process:

- **Basic Prompts –** Select the basic criteria for your dashboard such as Client ID, Timeframe, Currency, etc
- **Advanced Filters –** Apply statement information and custom defined filters

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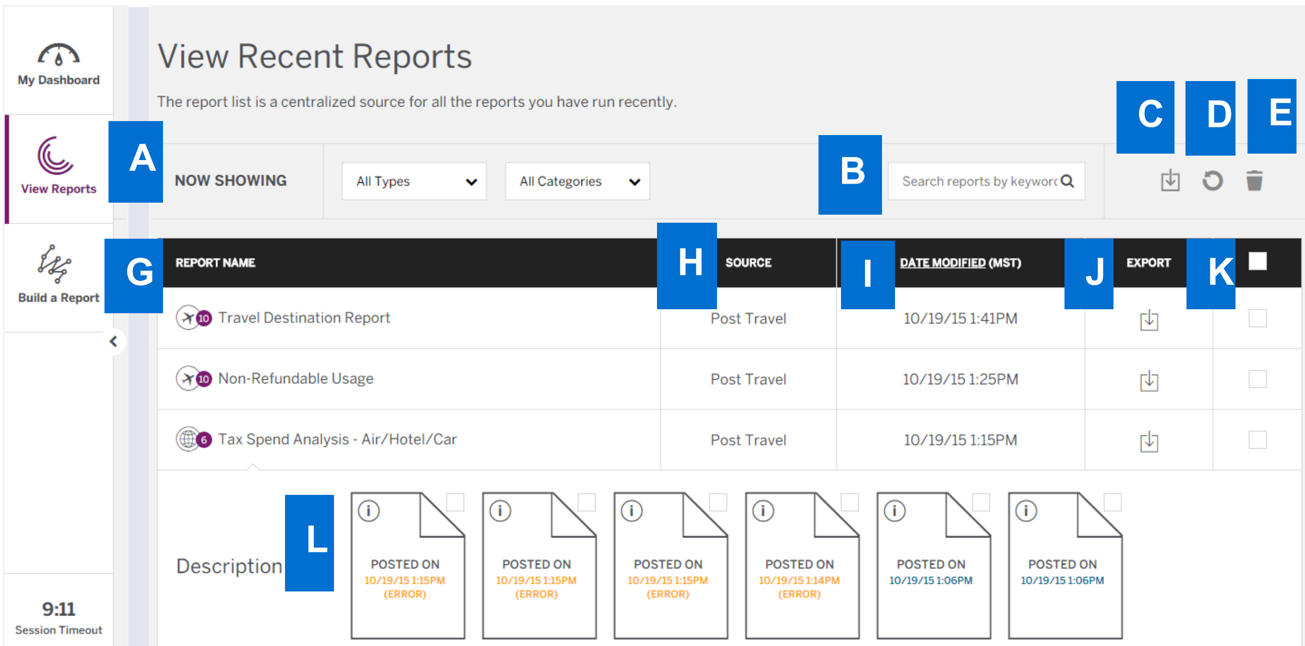
View Reports

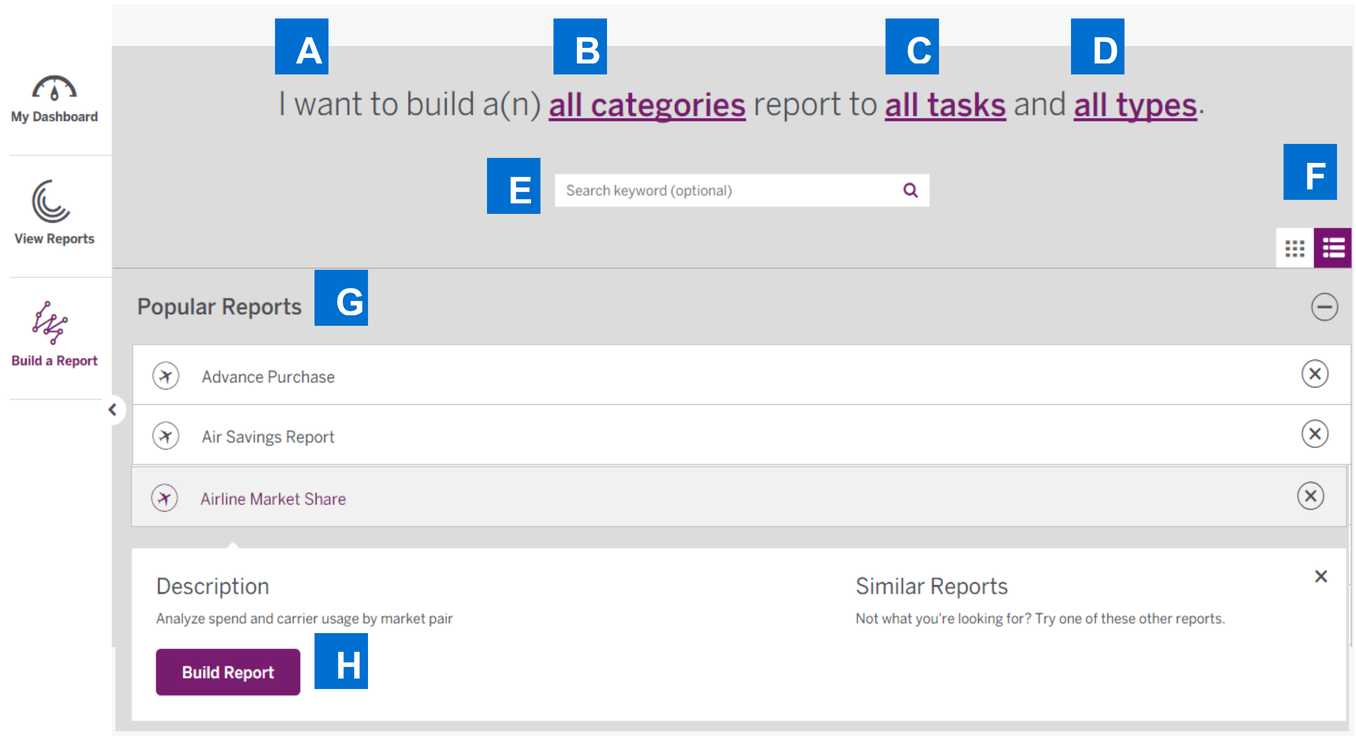
The View Report tab is your inbox of reports. Here you can view previously run (or scheduled) reports.



- **A.** Use the Now Showing dropdown menu to select the type or category to filter the report list
- **B.** Enter keywords to search through the report names and descriptions
- **C.** Click to download the most recently ran report in PDF or Excel
- **D.** Click the Refresh button to update the report list
- **E.** The trashcan icon will delete reports that have been selected by the checkboxes,
- **F.** Click the column header bar to sort reports by that column
- **G.** Report name listed here with the number of different version run dates
- **H.** Source indicates the type of report (Pre Travel, Post Travel or Benchmarking)
- **I.** Date by most current ran or modified date
- **J.** Click the download button to export reports in PDF or Excel
- **K.** Click the checkbox to select reports you want to delete. To select all of the reports, click the check box in the header bar. Click Delete button to permanently delete the selected reports from your Report List.
- **L.** See all report versions with same report name, click which report version to view or click the checkbox to export

Build a Report

From the Build a Report tab, you can select the report template you wish to run.



A. Use the "I want to build…" statement and the three drop down menus (i.e., categories, task and type) to refine the list of available reports and then select a report.

B. Use the Category drop down to filter on pre, post or benchmarking reports

C. Use the Task drop down to filter on Analyze Spend, Assess Interactive Booking Effectiveness, etc

D. Use the Type drop down to filter on custom, standard, scheduled, my report, company report, etc.

E. Enter keywords to search through the report names and descriptions

F. View the reports as a list or grid

G. List of available reports. These reports can also be view by popular, frequent and recent reports.

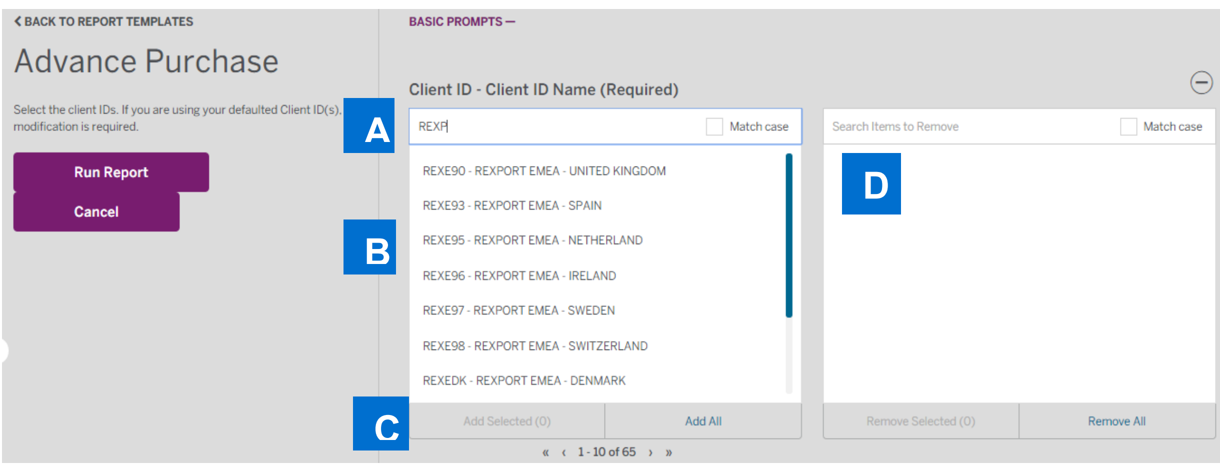
H. Click on the report name to obtain a description of the report or to start to build report

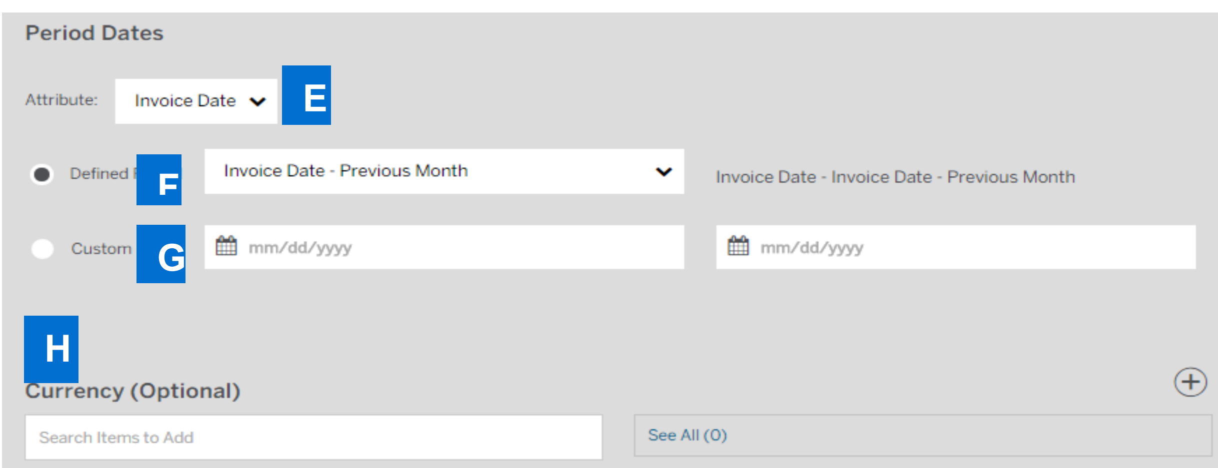
Running a Report

After selecting a report on the Build a Report tab, you will be directed through the report building process which consists of the following sections– **Basic Prompts, Column Management, and Advanced Filters**

Basic Prompts – Select the basic reporting criteria for your report such as Client ID, Timeframe and Currency

A. Search for the client ID(s) you wish to use
B. Select the client ID(s) you wish to use
C. Click the ‘Add Selected’ or ‘Add All’ box
D. Data for Client IDs in the selected box will be included within the report
E. Run reports by invoice date, travel start date, etc
F. Select a defined period range (i.e. Previous month, previous year, etc)
G. Or select your own custom time period
H. Select a currency for your report, if left blank it will default to local currency for the country





Column Management – Allows you to select the attributes and metrics that appear as columns within the report. Each report has a recommended design and those columns will already appear by default. These selections can be added to and removed from the “Selected” box.

Center:

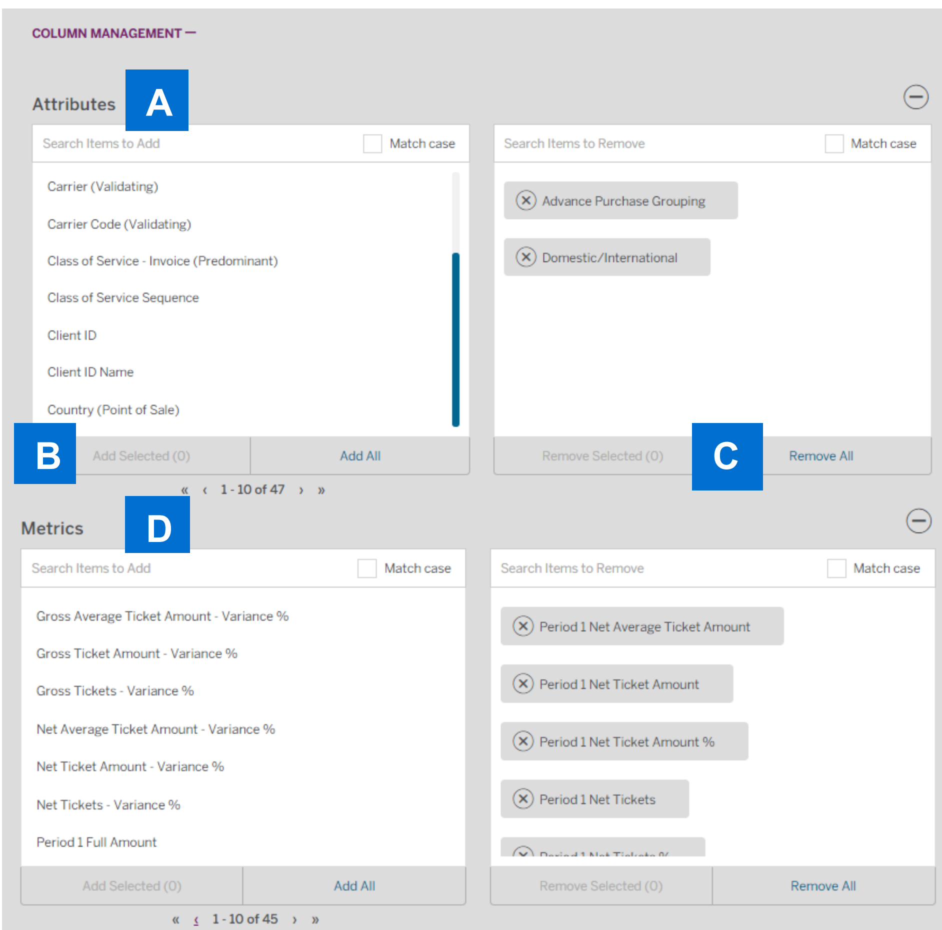
- Insights Report Field Definitions (contains a list of all available attributes and metrics and their definitions)
- Insights Report Field Mapping (contains a list of all available attributes and metrics and a list of reports where each can be found)

A. Attributes are the descriptive, non-calculated elements that you want displayed on your report such as carrier, online/offline, class of service or customer defined fields.

B. There’s a list of defaulted report selections, you can add additional fields by highlighting them and then selecting ‘Add Selected’

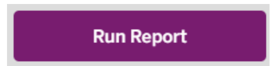
C. You can remove fields by highlighting them and then selecting ‘Remove Selected’

D. Metrics are the calculated or numerical fields that provide details of what is actually happening in your program such as amount, average ticket price, etc. and can be added and removed the same as attributes.

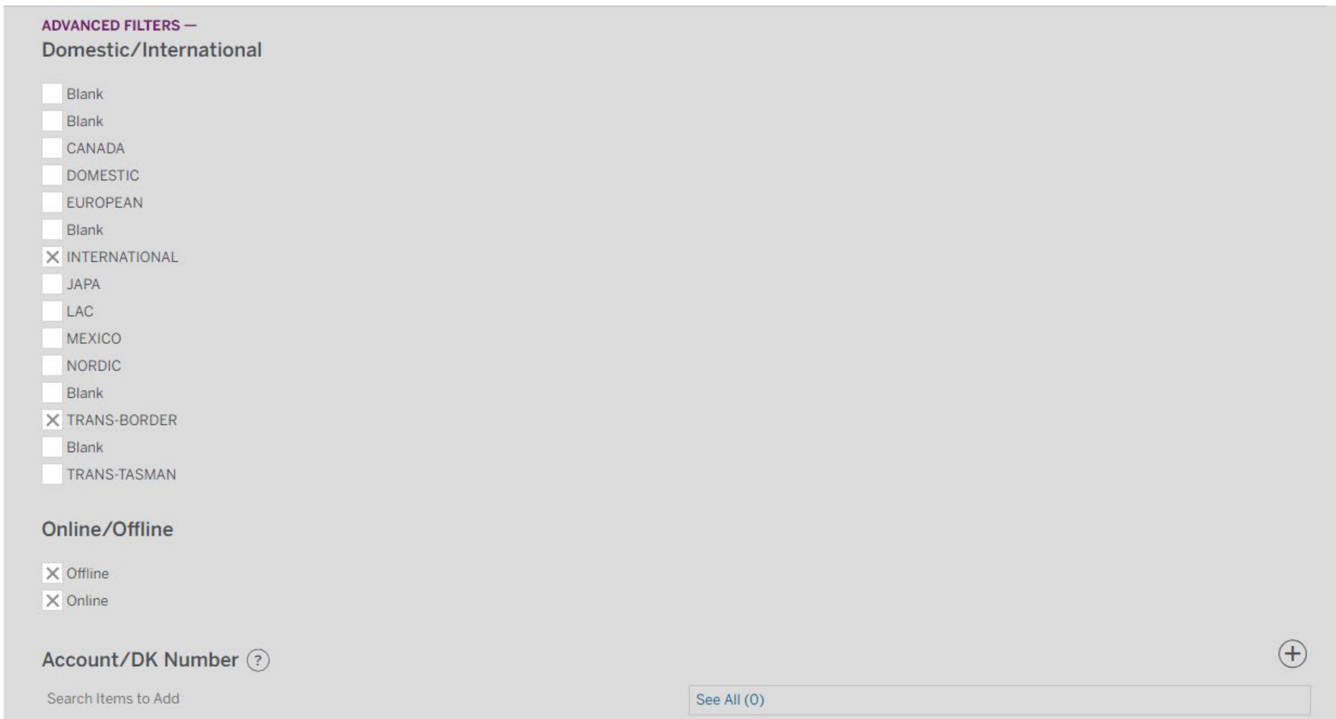


Advanced Filters – Use this section to filter the report data. Depending on the type of data, the filters may appear as a check box, a drop down list, a radio button or a shopping cart. Follow the instructions on each prompt to apply filters.

Once you have made your selections, click **Run Report**.



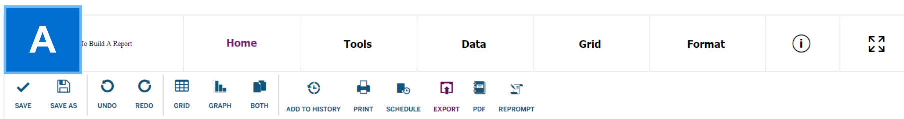
Once you click **Run Report**, you will see the wait screen. When the report is processed, it will replace the wait screen. While the report is processing, you have the option to go to the report list (to see status of all reports), show report details or cancel the current report request.

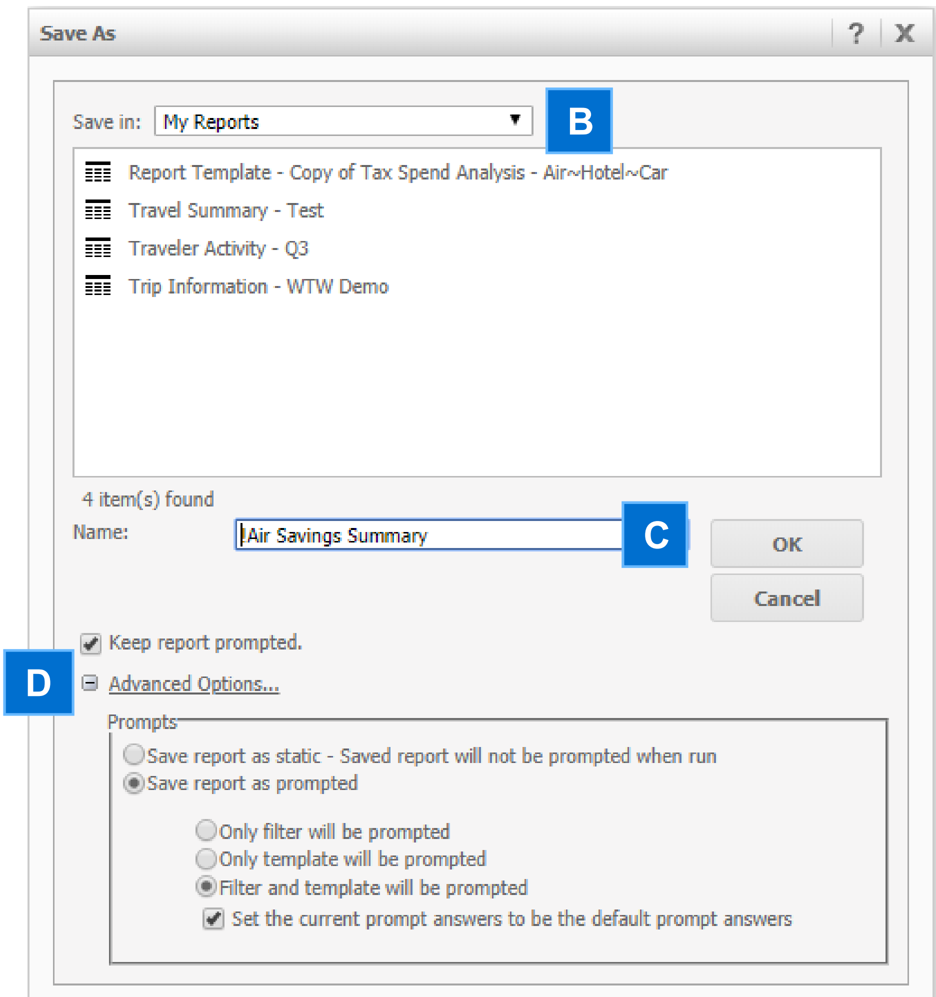


Saving a Report

To save a report,

A. Click the Save of Save As icon on the top menu under the Home tab
B. Select a location to save your report, filter or template
C. Provide a name and description for the report, filter or template
D. Click Advanced Options to set future prompting behavior, default options will be pre-selected





Advanced Options allow you to:

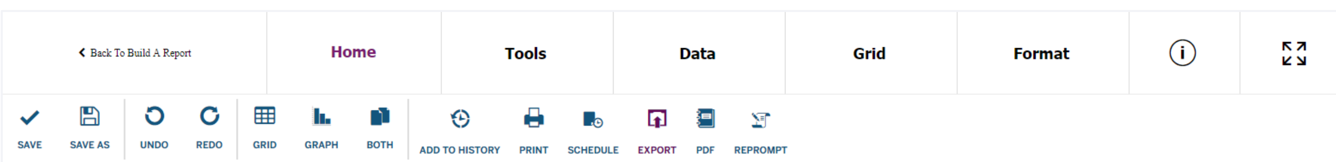
- **Save report as static** – No prompts will be displayed when you run the report in the future, so you cannot edit or change the reporting selections
- **Save report as prompted** – the report is saved with different prompts available for editing depending on the option selected
- **Only filters will be prompted** – Basic Prompts and Advanced Filters tabs will be re-prompted, allowing you to edit and make changes
- **Only template will be prompted** – Only Column Management tab will be re-prompted allowing you to edit the attributes and metrics
- **Filter and template will be prompted** – All tabs will be re-prompted allowing you to make changes to any/all reporting selections
- **Set the current prompt answers to be default prompt answers** – the most recent prompt answers are saved as the default answers.

Note: If you plan to schedule your report, you should save the report in the default format of **Save the report as prompted and Set the current prompt answers to be default prompt answers** (as shown below).

Managing Report Results

You can modify report results two ways right on the screen

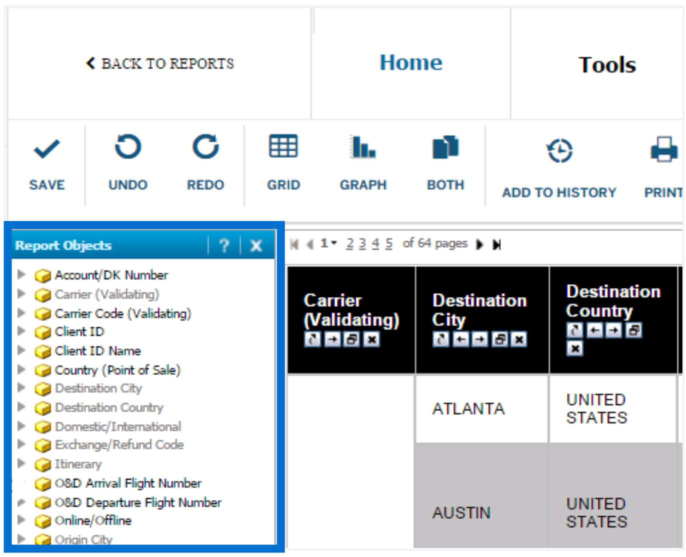
- Right click to see available actions
- Click on icons on the report results toolbar



Adding or removing columns

To avoid re-prompting the report, you can add a column from a subset of columns that have been identified as relevant to the report.

- Choose the **Report Objects** option from the **Tools** menu
- Fields that are shown in grey text are already part of the report. Fields shown in regular text are new fields that can be added to the report (i.e. Class of Service in the example below)
- Click on a new field and drag it onto the report.



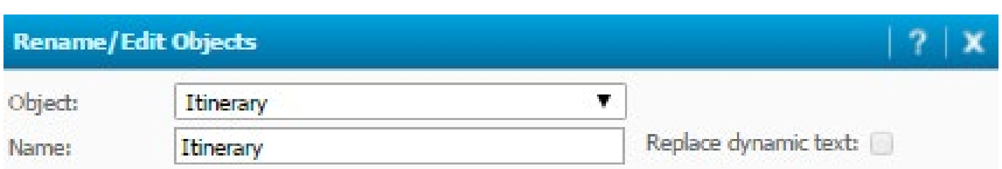
To remove columns from the report, right click on the column and select **Remove from Grid**

Renaming columns

Every organization has its own terminology. You have the option to rename the columns within the report to make it easier to understand for your colleagues. To rename a column:

- Right-click on the column and select **Rename/Edit** from the drop down menu

Add a new name in the “Name” box. You may also add a definition. Click **OK**.

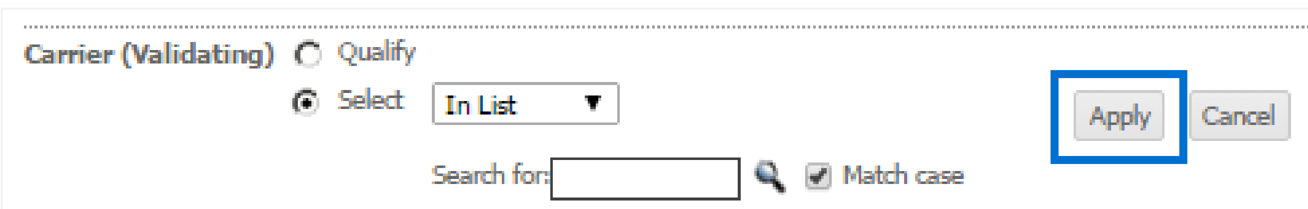


Filtering report results

Once you have viewed the report results, you may need to filter the report to only show a specific subset of information. To filer your report results:

E. Open the Tools menu and click View Filter.
F. The View Filter window will appear above the report. When you open the View Filter for the first time, you should see text showing that the filter is empty.
G. To add a filter, click the Add Condition link.

H. Choose a data element from the Filter On drop down menu
I. After choosing a Filter condition, the selection dialog box will appear. To filter on the field, you will need to Qualify or Select conditions
J. To Select conditions: double click a data element that appears in the list to move it to the “Selected” box
K. To ‘Qualify’ conditions such as “First Name Like “John” or ranges of values such as “Ticket Amount > $5000”, select the qualifier (Like, Greater Than, etc) and enter the value in the text box.
L. Click the checkmark to apply the filter to the report.



Exporting and printing report results

The format most commonly used is Microsoft Excel, but results can also be exported to other formats including CSV, HTML, and plain text.

To export to Excel:

- Click the export icon or click Export under the Home menu
- You can choose the format for export.

Exporting to Excel with formatting displays the data as it looks on the screen including font, colors, column widths, row heights, excluding menus

Exporting without formatting displays data in the default format of Excel.

To print a report

- Click the Print icon or click Print under the Home menu
- The Print Options window will appear, allowing you to select page layout options that change the header/footer, pagination & page orientation
- Click Show Printable Version to see how your report will appear when printed
- Click the print icon to print the results

Scheduling daily or monthly reports

For reports that you need on a regular basis, you can schedule the results to be automatically run and waiting in your View Reports list.

- After running a report you wish to schedule in the future, click on the Home menu and select Schedule

List of available scheduling options:

Daily (Intended Use: Pre Travel Reporting)

- Daily 9:30AM MST
- Mon-Fri 1AM MST
- Mon-Fri 4PM MST

Monthly (Intended Use: Post Travel Reporting)

- 1st Saturday 5PM MST
- 2nd Saturday 5PM MST
- 3rd Saturday 5PM MST
- 4th Saturday 5PM MST
- Last Saturday 5PM MST

Weekly (Intended Use: Pre/Post Travel Reporting)

- Sunday 10AM MST

Note: There is a 72-hour upload time for data to be loaded to the system. To allow for all data to be loaded to the system for a given month, it is best to refrain from selecting the “Monthly - 1st Saturday” option.