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Shared Travel Services Initiative

American Express @ Work Corporate Travel Reporting - Core

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Today's Learning Objectives

After today's session, you will be able to:

- ✓ Describe the purpose of AMEX @ WORK corporate travel
- ✓ Log on to Amex@Work
- ✓ Identify key components of each screen
- ✓ Generate "Shared Reports"
- ✓ Generate On-line Booking Tool (OBT) usage reports
- ✓ Export reports
- ✓ Use the "History List" to view recently generated reports
- ✓ Availability of Resources



Amex@Work Benefits

- Internet access – 24 hours a day
- Secure, password protected environment
- Data is updated 48-72 hours after transaction
- Historical data from April 2004 is stored



Logging on to Amex@work

1. URL: <http://www.americanexpress.com>
2. Login: use your own login ID
3. Password: use your own password
4. Your user ID and password are attached to your department's data



Exercise 1 Executive Summary

1. Select the Corporate Travel folder. Select the Shared Reports. The Shared Reports page is displayed.
2. Select the Financial Management folder.
3. Select the report entitled “W1010MT-Executive Summary”. The user prompts page is displayed
4. In Prompt 1, choose Invoice Month from the Attribute dropdown list and select Go.
5. Leave other prompts with default values.
6. Select the months for which you want to report
7. Select Run Report. The report is displayed
8. Export Report (see slide 6).



Exporting a full report to Microsoft Excel

1. Display the report.
2. Select the Export icon at the top of the page. The Export options page is displayed.
3. Select the radio button beside Excel with formatting to export the report to Excel with the same formatting, colour and overall structure that appears in American Express @ Work.
4. Select Export from the bottom right corner. The report is exported to Excel.



Exercise 2 - Top Travellers

1. Select the Corporate Travel folder. Then select Shared Reports. The Shared Reports page is displayed.
2. Select the Financial Management folder.
3. Select the report entitled "W1060MT-Top Travelers". The user prompts page is displayed. Prompt 1 - Select April 2005 as the date.
4. Leave all other prompts with default values.
5. Select Run Report. The report is displayed. Re-prompt Report.



Exercise 3 – User-Defined Fields

- User-Defined Fields are data fields containing information input during the reservation process
- These fields contain information specific to Government of Canada such as OBT intervention levels
- Not all User-Defined Fields are currently used for reporting



Exercise 3 – User-Defined Fields (cont'd)

User Defined Field	Description	Sample
1	Surcharge	15.00
2	Transaction Fee	45.00
3	OBT Intervention Level	N; A; F
4	OBT Reason Code	AH
5	VIP Indicator	V
6	Non-Refundable Indicator	N
7	Split Ticket Indicator	S
8	Consolidator Indicator	O
9	Booking Origin Code	E
10	Profile Type	N
11	Portal Indicator	P
12	TAN Recommender	R
13	Group	AA
14	Sub-Group	BBB
15	Level	11
16	TAN Level 1	KRR2
17	TAN Level 2	FSU2
18	TAN Level 3	XHE3
19	TAN Channel	R
20	Traveller's Home Dept	NRX4



Exercise 3 – User-Defined Fields (cont'd)

OBT Intervention Level	
N	No Agent Intervention
F	Full Agent Intervention
A	Agent Assist

Examples:

- User Defined Field 3 is equal to F
- User Defined Field 3 is **IN** (the list) N;F;A (**capital letters**)



Exercise 3 -OBT Intervention

By comparing the Executive Summary ticket count to the ticket count result in this exercise, the OBT usage is determined.

1. From the Corporate Travel page, select the Shared Reports. The Shared Reports page is displayed.
2. Select the Financial Management folder.
3. Select the report entitled "W1010MT-Executive Summary". The user prompts page is displayed
4. Prompt 1 choose Invoice Month from the Attribute dropdown list and select Go. Choose April 2005 and add to the Selections box.
5. Prompt 5 from the Hierarchy drop down list, choose User Defined 3 (See User Defined Table on slide 9)



Exercise 3 OBT Intervention (con't)

6. The available box will state "The attribute is locked. Element list can not be displayed."
7. Select the radio button next to the word "Qualify". The elements will then be returned in a list.
8. From the "Is" drop down menu, choose "In"
9. Type N (capital letter) in the Value Box and select the right arrow to move to the Selection Box
10. Leave other prompts with default values
11. Run Report. The report is displayed.
12. From the Executive Summary (Exercise 1), take the total of ticket counts and subtract the number of counts from the OBT report to calculate the percentage of bookings made through the OBT.



Exercise 4: TAN Level Reporting

1. Re-prompt the OBT Intervention Report from Exercise 3.
2. Prompt 5, keep User Defined 3 in the selected box. From the Hierarchy drop down list, choose User Defined 16, 17 or 18 for the TAN Level of your TAN prefix(es) as it would appear on your department's hierarchy. The available box will state "The attribute is locked. Element list can not be displayed."
3. Select the radio button next to the word "Qualify". The elements will then be returned in a list.
4. From the "Is" drop down menu, choose "In"
5. In the Value box, type TAN (i.e.: ABC1; capital letters and use semi-colon if more than one value is applied)
6. Run Report. The report is displayed.

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History List

- This list provides details on the status of each report requested.
- A maximum of 40 reports will appear.
- Once the list exceeds 40, the oldest report is deleted.



Reviewing the History List

- **Status:** indicates if the report is processing, ready to be viewed or if there is an error
- **Ready:** report has been processed
- **Error:** report was not successfully processed due to server-related issues, prompts in the report were entered incorrectly, or report has expired.
- **Waiting for Prompt:** report has been generated but not viewed
- **Ready Marked as Unread:** report was previously viewed or read
- **Message Creation Time:** when the report was created or modified (times are MST)



Reviewing the History List (cont'd)

- Selecting the “i” provides detailed information on the report.
- Selecting the report checkbox and then click the **Remove** button to delete the report from the list. More than one report can be selected at a time.



History List Best Practices

- Note: It is recommended that you save any important report on your own hard drive.
- Occasionally reports are randomly deleted from this list; especially if they contain large amounts of data.



Contact Information

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Questions

