2024

iBank report user guide

CREATED BY

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CI AZUMANO

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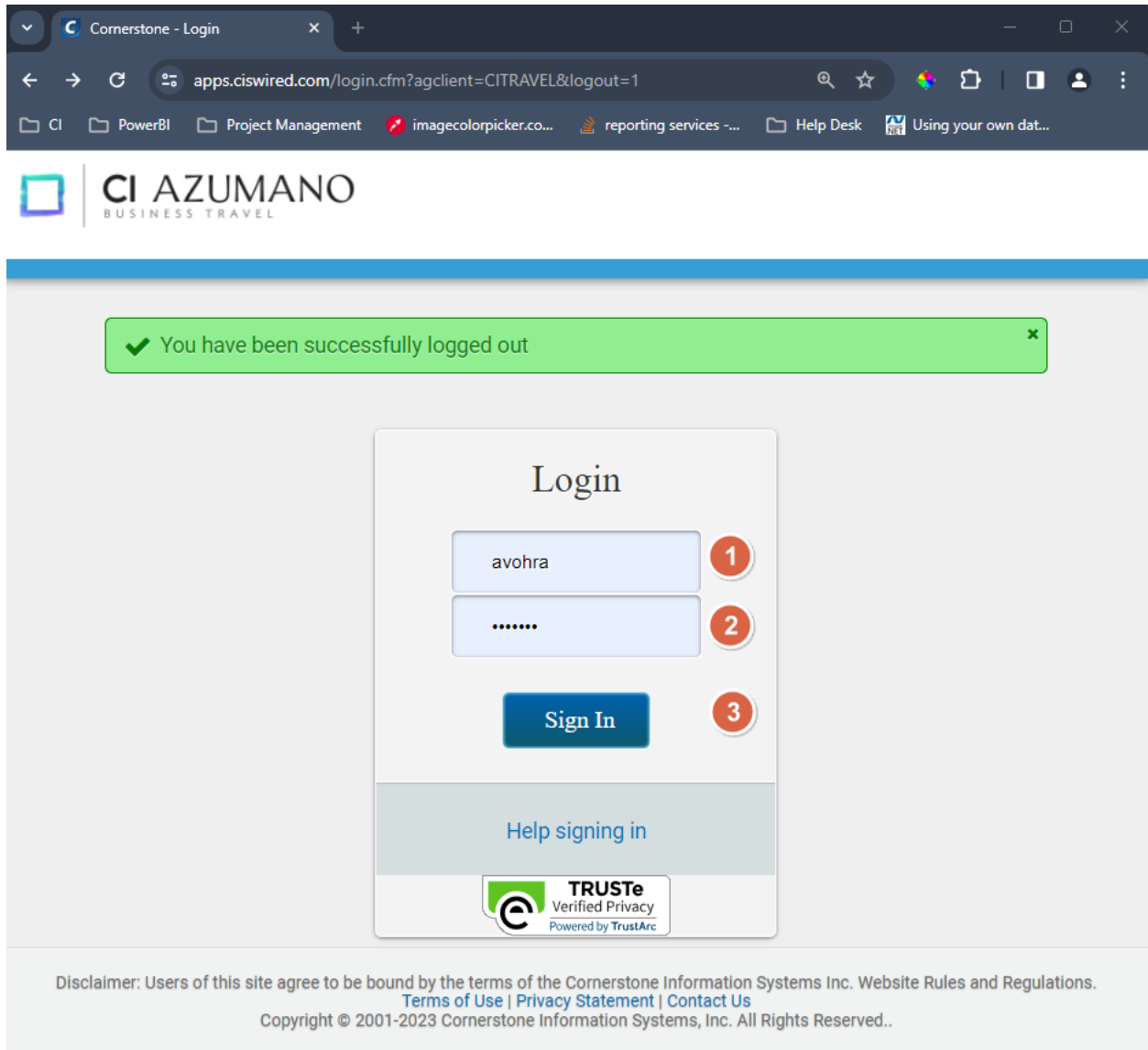
Login Page

Step: 1

iBank URL: https://apps.ciswired.com/login.cfm?logout=1&agclient=CITRAVEL

Step 2:

Login Page

1: Enter User Name

2: Enter Password

3: Click Sign In

Password Reset *(You will be directed to this page if logging in for the first time)*
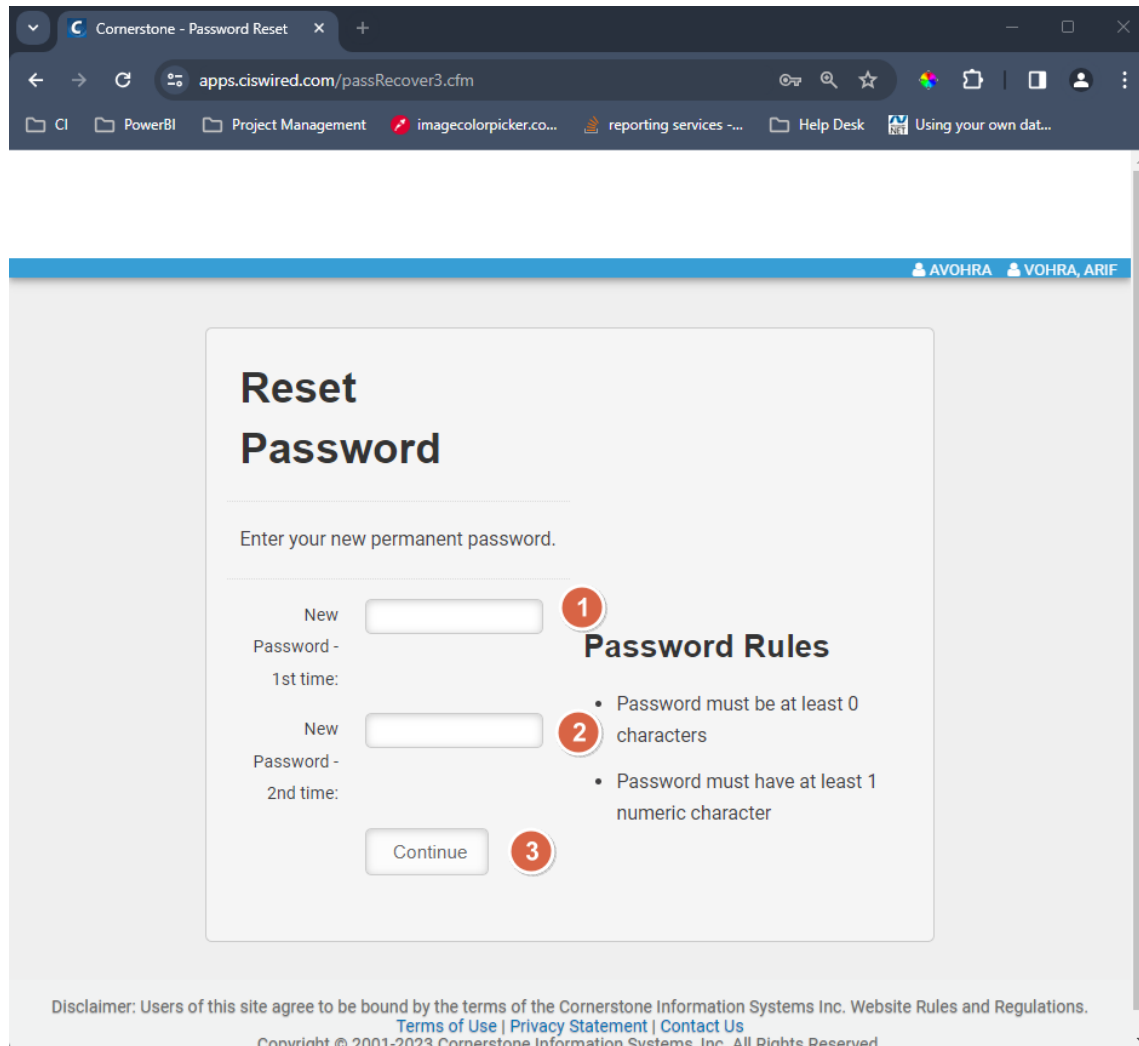
1: Enter New Password 1st time:

2: Enter New Password 2nd time:

3: Click Continue

Note:

Password must be minimum 7 characters or longer.

Password must have at least 1 numeric value.

Home Page

When signing in you will be directed to the Home page

1: Application Menu.

2: Search report

3: Reports: This is the list of standard reports, you have access to.

4: Organize reports based on outcome or by data type.

Search Report

1: Type to search for report(s).

2: Report(s) displayed using the search criteria.

Run Report

When report selected from the screen above
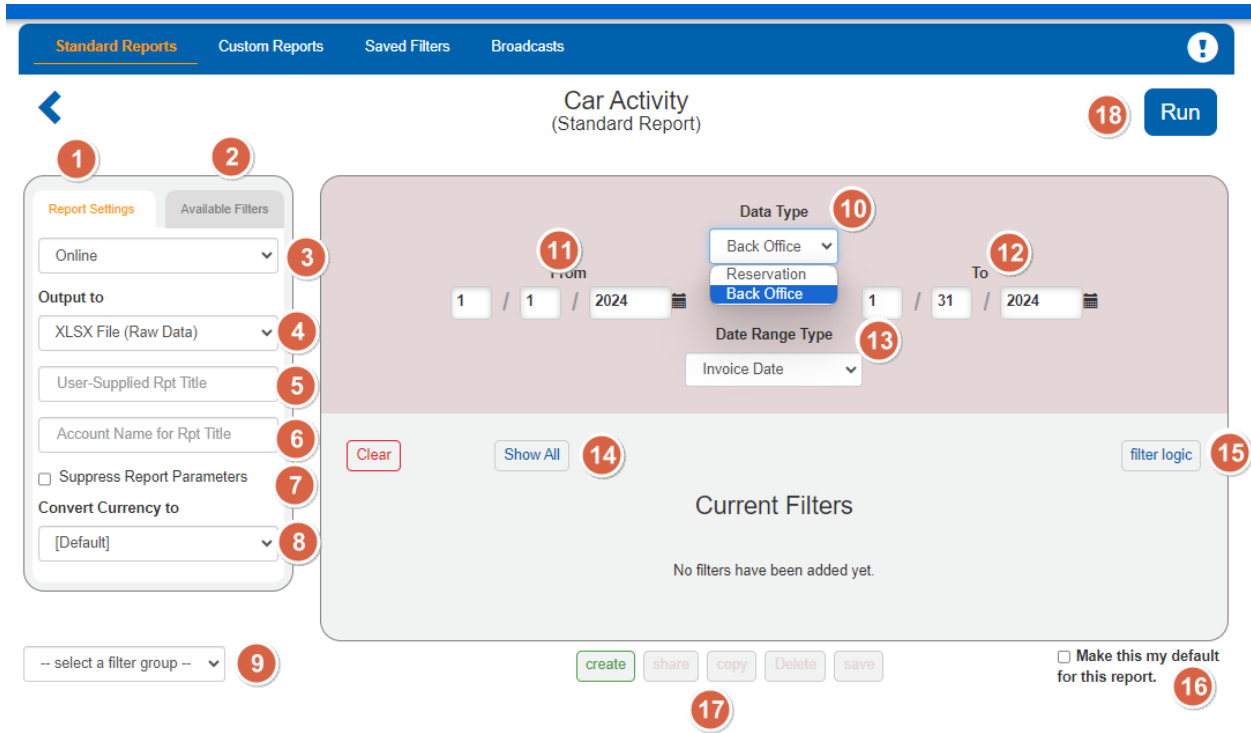
1: Report Settings

2: Available Filters:

      Covered in the next topic.

3: Online/Offline

      Online: Report will open in a pop-up window within the browser.

      Offline: Runs the report, at a later time, and emails report to the user.

4: Report Output format

      PDF, Word, XLSX or CSV

5: User Supplied Report Title

      If needed, Custom Report Title.

      i.e. Changing Air Activity Report title to California - Air Activity Report

6: Account Name for the report title

      If needed, Custom Account name in the report.
      i.e. Department of Transportation wish to see California DOT - Account name

7: Suppress Report Parameter

Does not display/print report parameter(s) on the report.

8: Convert Currency to:

Converts report to selected currency.

Default currency is USD

9: Select Filter Group

Report will display selected filter group.

10: Data Type

Reservation: Will show only records that have been booked but not ticketed (Date Range Type – selection other than invoice date must be used).

Back Office: This is always the default and pulls only ticketed records from the Back Office system.

11: From

Report Start Date

12: To

Report End Date

13: Date Range Type

Invoice Date, Departure Date etc. (Options are based on selected report type).

14: Clear/Show All

Show All: Show All Filter(s)

Clear: Clear All Filter(s)

15: Filter Logic:

Filters data based on and/or criteria.

16: Make this my default report

If selected all filters will be saved when report is run next time

17: Save Filter name

18: Run report

The report will be downloaded in your default download folder.

If report has large amount of data: you will be prompted with the screen shot below.

1: To: Provide a valid email you wish to send report to

2: CC: Not required: Provide a valid email you wish to send to

3: Subject: Your email Subject

4: Sender Name: Do not change

5: Sender Address: Do not change

6: Email Format: Do not change

7: Click Continue

Your report will be sent to your email when the report has finished running.

Sample Email:

OfflineReport: Car Activity

CI Azumano <reports@ciazumano.com>
To ● Arif Vohra

Mon 2/12/2024 1:47 PM

Start your reply all with: Thank you!   Thank you for the confirmation.   Received, thank you.   ⓘ Feedback

[EXTERNAL EMAIL] This email originated from outside CI Azumano. Do NOT click links or open attachments unless you recognize the sender's email address and know the content is safe.

Your iBank Offline Report has processed.

Available to view at
https://apps.ciswired.com/bcr.cfm?ky=X_4792903_084409290032

Important Note: The reports linked to this email message will be removed from the iBank web server in 30 days.
If you wish to access reports after that time, you must view and save them to your computer.

Batch processed at: 02/12/2024 1:46 PM (local time at iBank server)

Add Filters

1: Click on Available Filter List

2: Search Filter

3: Click Plus Sign (+) to select Filter

4: Select Filter Criteria and Add filter value

5: Click minus (-) sign to remove the filter

6: Click to select value if not known

1: Type Search Criteria

2: Click from the Grid

3: Value will be filled

4: Click the X Button

7: Click Run

Support

Email Support: careports@ciazumano.com

Please do not use Support link provided in the iBank portal.

● organize by outcome   ○ organize by data type