

2024

# iBank report user guide

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CI AZUMANO

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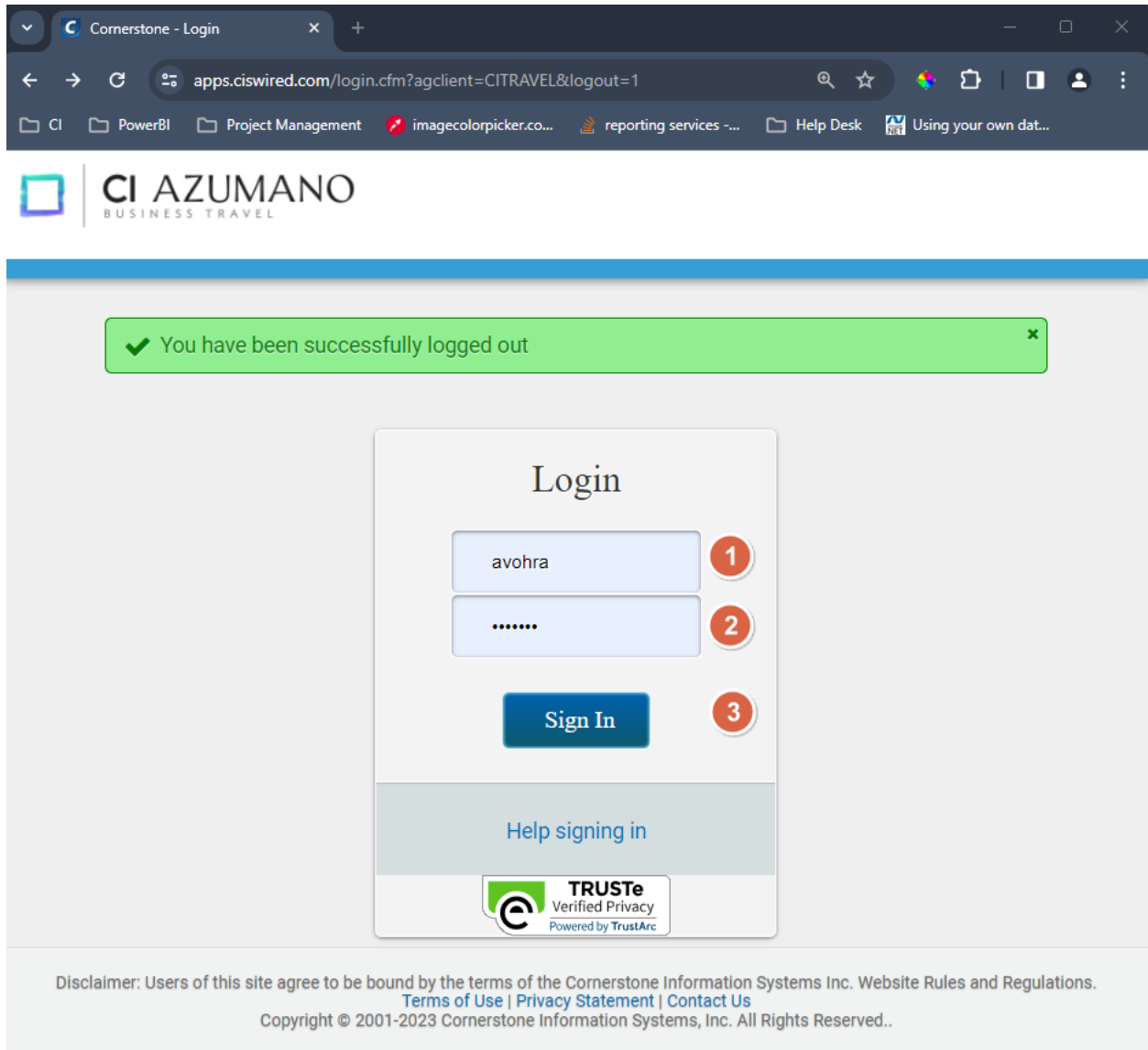
# Login Page

Step: 1

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

Step 2:

Login Page



Cornerstone - Login

apps.ciswired.com/login.cfm?agclient=CITRAVEL&logout=1

CI AZUMANO  
BUSINESS TRAVEL

✓ You have been successfully logged out


### Login

avohra 1

..... 2

Sign In 3

[Help signing in](#)

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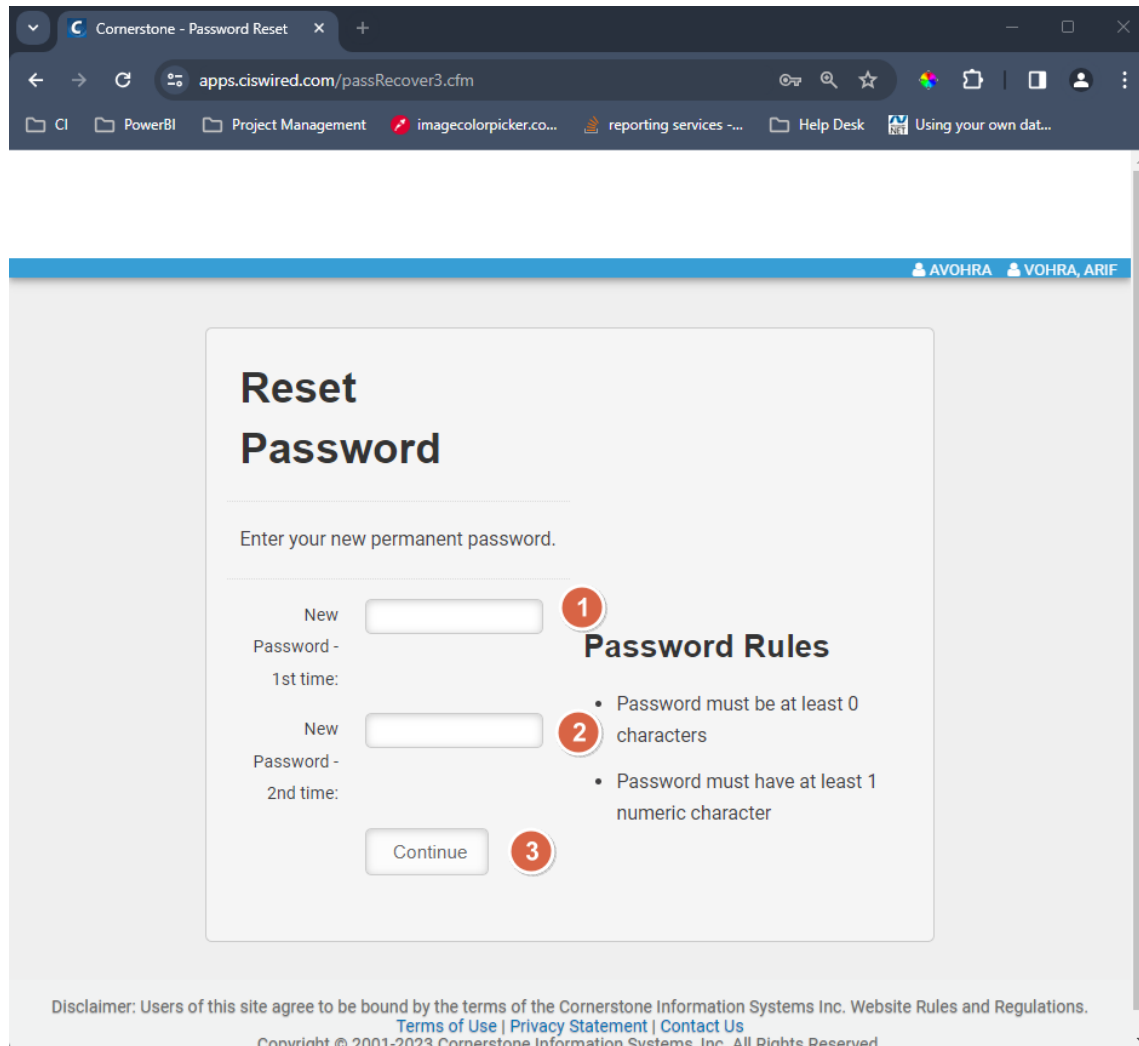
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1: Enter User Name

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 1<sup>st</sup> 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

The screenshot shows the Home Page interface with the following elements:

- 1:** Application Menu (Standard Reports, Custom Reports, Saved Filters, Broadcasts, and a notification icon).
- 2:** Search report (Search bar with placeholder text "type to search for standard report").
- 3:** Reports (List of standard reports organized into categories: Spend Analysis, Supplier Management, Policy/Risk Management, Activity Management, Spend Management, Reconciliation Analysis, and Administration).
- 4:** Organize reports based on outcome or by data type (Radio buttons for "organize by outcome" and "organize by data type").

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

The screenshot displays a web interface for searching reports. At the top, a blue navigation bar contains the following menu items: **Standard Reports** (highlighted), Custom Reports, Saved Filters, and Broadcasts. On the right side of the navigation bar is a help icon (exclamation mark in a circle). Below the navigation bar is a search bar containing the text "Car" and a magnifying glass icon. To the right of the search bar is a red circle with the number "1". To the left of the search bar is a red circle with the number "2". Below the search bar, there are seven report categories displayed in a grid:

- Spend Analysis**: Top/Bottom Travelers - Car
- Supplier Management**: Analysis by City - Car, Analysis by Vendor - Car, Top/Bottom Cars, Top/Bottom Validating Carriers
- Policy/Risk Management**
- Activity Management**: Car Activity
- Spend Management**
- Reconciliation Analysis**: Transaction Analysis by Credit Card
- Administration**

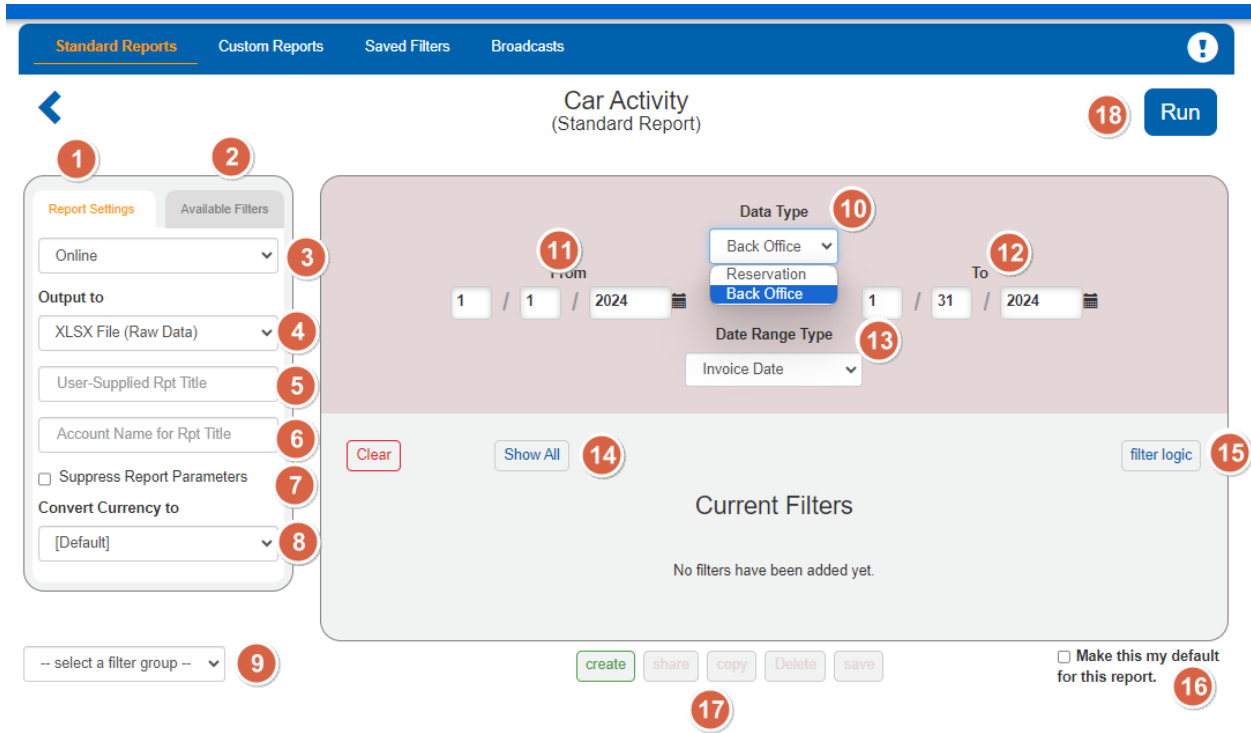
At the bottom of the interface, there are two radio buttons for organizing the results:  organize by outcome and  organize by data type.

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.

The screenshot shows a web form titled "Offline Report" with a blue header and a close button (X). The main content area has a blue background and contains the following text and fields:

**Due to the large volume of data selected for this report, it must be run offline.**  
Enter the email address of the recipient and click Continue. The recipient will be notified via email when the report is ready.

**To:**  (1)

**CC:**  (2)

**Subject:**  (3)

**Sender Name:**  (4)

**Sender Address:**  (5)

**Email Format:**  (6) ▼

(7)

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:

The screenshot shows an Outlook window titled "OfflineReport: Car Activity - Message (Plain...)" with a search bar and a ribbon menu containing options like Delete, Respond, Share to Teams, All Apps, Quick Steps, Move, Tags, Editing, Immersive, Translate, Zoom, Reply with Scheduling Poll, Report Message, and Viva Insights.

**OfflineReport: Car Activity**

 CI Azumano <reports@ciazumano.com>  
To  Arif Vohra Mon 2/12/2024 1:47 PM

Start your reply all with:    [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](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

The screenshot shows the 'Car Activity (Standard Report)' configuration page. At the top, there are navigation tabs: 'Standard Reports' (selected), 'Custom Reports', 'Saved Filters', and 'Broadcasts'. A 'Run' button is in the top right. On the left, a sidebar contains 'Report Settings' and 'Available Filters'. The 'Available Filters' list includes: Account Number, Agent ID, Air Commission, Air Exception Reason Code, Booked Date, Booking Agent, Booking Tool, Branch, Break 1, and Break 2. Each filter has a plus sign (+) to its right. Below the list are options to 'organize by travel type' and a filter group selection dropdown. The main area is titled 'Data Type' and includes a 'Back Office' dropdown, date range pickers for 'From' and 'To' (both set to 1/1/2024), and a 'Date Range Type' dropdown set to 'Invoice Date'. Below these are 'Clear', 'Show All', and 'filter logic' buttons. The 'Current Filters' section shows 'Account Number' with a dropdown set to 'Equal or in a List', an input field, and a minus sign (-). A note below says 'Press down key or click [here](#) to search'. At the bottom, there are 'create', 'share', 'copy', 'Delete', and 'save' buttons, and a checkbox for 'Make this my default for this report.'.

- 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

The image shows a software dialog box titled "Search Account Number" with a blue header bar. In the top right corner of the header, there is a red circle containing the number "4" and a close button (an "X" icon). Below the header, the text "Current value for Account Number" is displayed above an empty text input field. A red circle with the number "3" is positioned over the right side of this input field. Below the input field is a dropdown menu. The dropdown is open, showing a list of search results. The first item is "4446031" in bold, followed by "SCIENCE CENTER (4446031)". A red circle with the number "2" is positioned over the text "SCIENCE CENTER (4446031)". Above the dropdown, the text "Sc" is visible, with a red circle with the number "1" positioned over it. In the top right corner of the dialog box, there is a red circle with the number "4" and a close button (an "X" icon).

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](mailto:careports@ciazumano.com)

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

organize by outcome    organize by data type

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