



# ***Cornerstone*** information systems<sup>®</sup>

**Enabling and using the iBank<sup>®</sup>  
New Reporting Workspace**

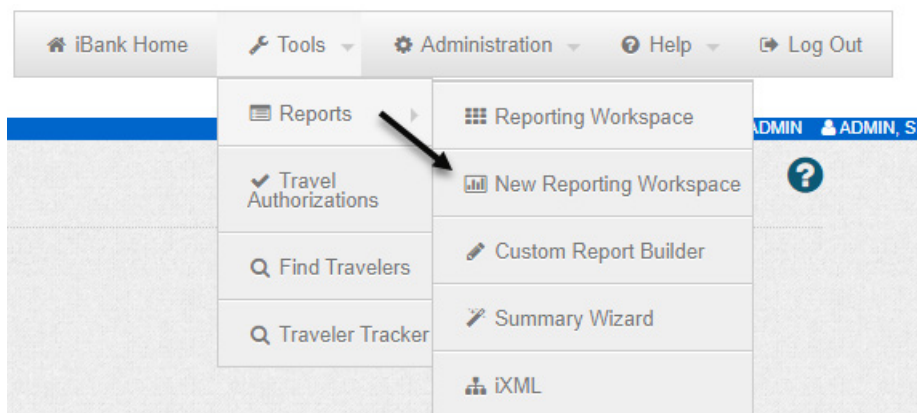
# Enabling and using the iBank® New Reporting Workspace

Site Administrators will enable users by navigating to the Site Admin page then going to User Management > Users. On the System Access tab under the User Has Access To section, check the box User is enabled for New Reporting Workspace.

The screenshot shows the 'System Access' tab in the user management interface. The 'Admin Type' section has 'Site' selected. The 'User Has Access To' section has the following options checked: 'Standard iBank Reports', 'Agency Reports', and 'Travets are turned ON for this User'. The option 'User is enabled for New Reporting Workspace' is currently unchecked and highlighted with a blue background.

Section	Option	Status
Admin Type	Site	Selected
	Organization	Not Selected
	None	Not Selected
	Shared User Account	Not Selected
User Has Access To:	Standard iBank Reports	Checked
	Agency Reports	Checked
	Travets are turned ON for this User	Checked
	User is enabled for New Reporting Workspace	Not Checked

Once this is enabled, users will have the ability to navigate to the New Reporting Workspace area by clicking on the Tools menu option, go to Reports, then New Reporting Workspace. Users will be able to access both Reporting Workspaces in iBank until we disable Flash from the site.



# Enabling and using the iBank® New Reporting Workspace

Users will have the ability to set their Homepage default option to the New Reporting Workspace. Users who have the New Reporting Workspace page set as their default Home will be re-directed to the new version throughout the site.

For example, if a user is working in the Custom Report Builder and they click on Run, the user will land on the New Reporting Workspace page rather than the Flash Reporting Workspace.

If a user has a Flash Reporting Workspace page set as their default homepage, then they will be redirected to the Flash version throughout the site.

The screenshot shows a user profile settings page with the following fields and options:

- Adhere to Organizational Updates:
- Change User Password:
- Default Product:
- iBank Default Home:  (Dropdown menu is open showing options:   
[- NONE -]  
Reports: Reporting Workspace: Standard Reports  
Reports: Reporting Workspace: Custom Reports  
Reports: Reporting Workspace: Filters  
Reports: Reporting Workspace: Broadcasts  
Reports: New Reporting Workspace: Standard Reports  
Reports: New Reporting Workspace: Saved Filters  
Reports: New Reporting Workspace: Custom Reports  
Reports: New Reporting Workspace: Broadcasts  
Reports: Custom Report Builder  
Reports: Summary Wizard  
Reports: iXML  
Travel Authorizations  
Find Travelers
- Display Language:
- Convert Currency to:  supported currencies [\[More info\]](#)
- Default Time Zone:  Observes DST
- International Settings:
- Date Display Format:
- As Defined by Int'l Settings  ddMonyyyy (28Aug2020)

# Enabling and using the iBank® New Reporting Workspace

Below is the New Reporting Workspace Standard Reports page.

## Standard Reports

### Spend Analysis

- Executive Summary by Home Country
- Executive Summary with Graphs
- Executive Summary Year to Year
- Negotiated Savings
- Published Savings
- Quick Summary
- Quick Summary by Month

### Supplier Management

- Analysis by City - Car
- Analysis by City - Hotel
- Analysis by Vendor - Car
- Analysis by Vendor - Hotel
- Carrier Concentration
- Class of Service
- Market Share
- Top/Bottom Cars
- Top/Bottom City Pair

### Policy/Risk Management

- Exceptions - Air
- Exceptions - Car
- Exceptions - Hotel
- PCM Key Performance Indicators
- PCM Request Activity
- PCM Traveler Detail
- Fare Savings - Air
- Fare Savings - Car

### Activity Management

- Air Activity
- Air Activity by UDID
- Arrival
- Car Activity
- CO2 Air Summary
- CO2 Combined Summary
- Departures
- Hotel Activity
- iBank Standard Extract

### Spend Management

- Advance Booking - Air
- Advance Bookings - Car
- Advance Bookings - Hotel
- Concurrent Segments Booked
- Missed Hotel Opportunities
- TicketTRAK Detail Report
- TicketTRAK Email Log
- TicketTRAK Log Report
- TicketTRAK Overview

### Reconciliation Analysis

- Electronic Invoice - Combined
- Itinerary Detail - Combined
- Service Fee Detail by Transaction
- Service Fee Detail by Trip
- Transaction Analysis by Credit Card
- Trip Detail

### Productivity

- Account Summary Air - 12 Month Trend
- Account Summary Air - YTY Comparison
- Air Activity by Specialist ID
- Specialist Productivity - Air
- Specialist Productivity - Combined
- Validating Carrier

### Administration

- Broadcast Report Overview
- Broadcast Reports Status
- Company Users
- Custom Report Layout
- Document Delivery Log Report
- iBank Event Log
- Master Hotel Property Review
- Preferred Hotel Property

organize by outcome    organize by data type

# Enabling and using the iBank® New Reporting Workspace

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If you have any questions, we encourage you to visit our iBank New Reporting Workspace FAQ and Changelog page located here:

<https://ciswired.com/2020/08/28/ibank-new-reporting-workspace-faq-and-changelog/>

We are constantly updating this page with new Frequently Asked Questions, new debugs, and a list of current known issues that we are working on at the moment.

**If your questions are not answered on that webpage, please contact Support via email at [support@ciswired.com](mailto:support@ciswired.com) or by phone at: +1 (812) 330-4361**

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