



***iBank***<sup>®</sup>

***Changes to the  
Reporting  
Workspace***



# Changes to the Reporting Workspace

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# Changes to the Reporting Workspace

## Overview

The previous version of the iBank Reporting Workspace was built using Adobe Flash. Since this technology is being discontinued, we have put in place an updated version of the Reporting Workspace using modern web technology. This updated version will be in place for users on November 30<sup>th</sup>, 2020.

During the creation of this latest version, our goal has been to keep as many behaviors and interactions the same as the Flash based version. However, there are several areas where we decided to change user's interactions. These changes were made either to improve the user's experience while using the site or resolve issues that were present in the old Flash version. This document outlines the changes that have been implemented in the site.

# Changes to the Reporting Workspace

## Changes to the iBank Home page

### Open Menu

In Flash, there was an Open Menu pop-up (**Figure 1**) to navigate between the Standard, Custom, Saved Filters, and Broadcasts. Now, on the iBank Home page there is one bar that users can click to the different pages (**Figure 2**).

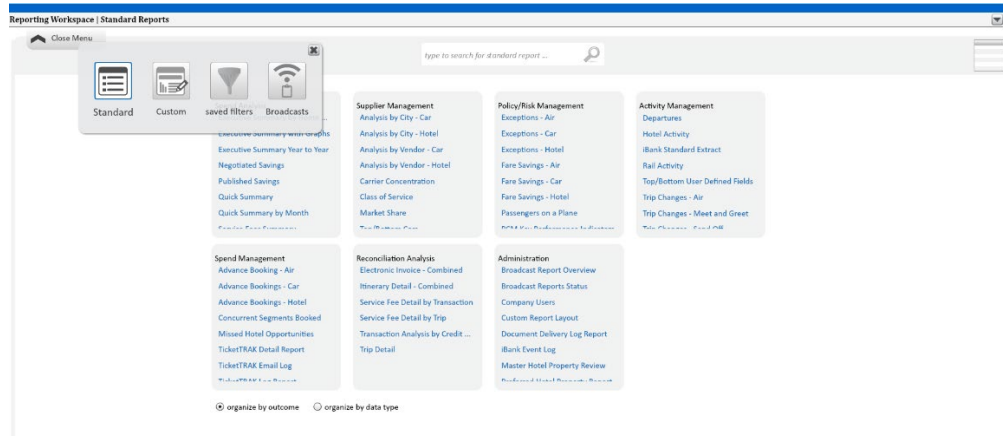


Figure 1: Example of an iBank Home page in Flash.

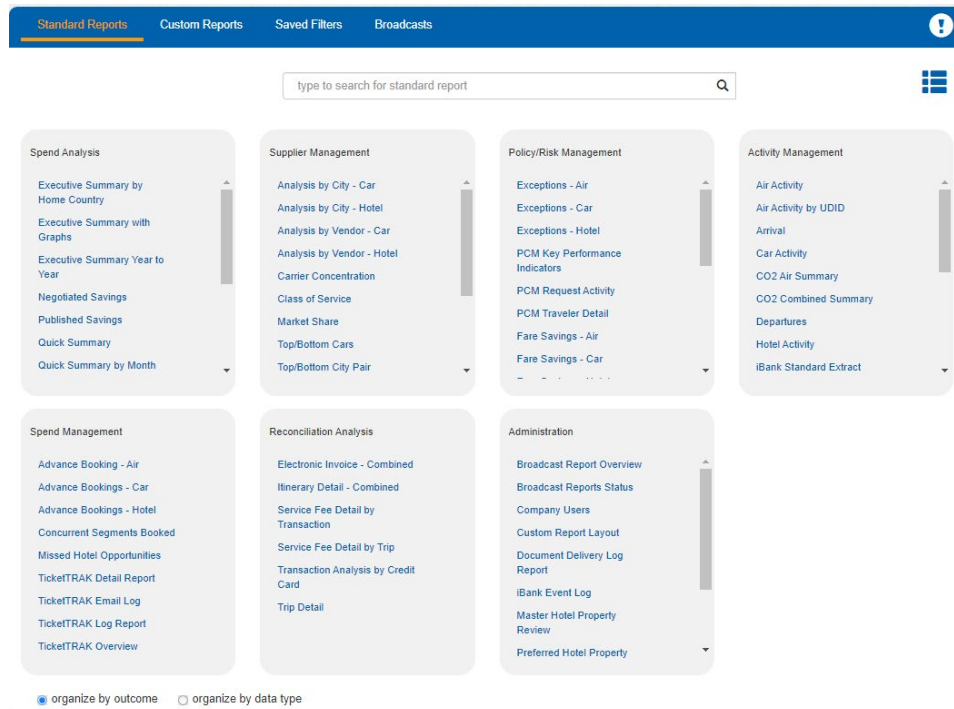


Figure 2: Standard Reports page in the new Reporting Workspace.

# Changes to the Reporting Workspace

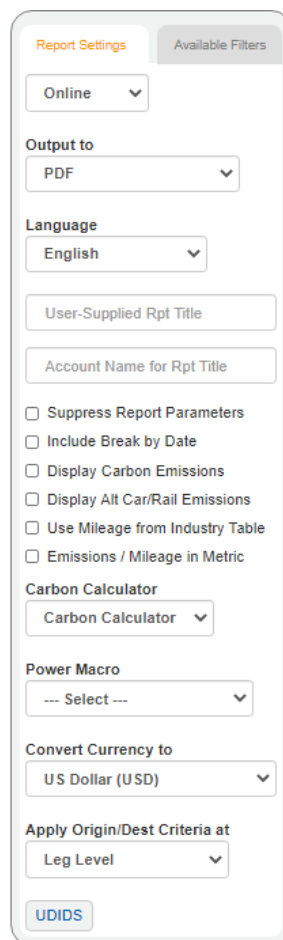
## Opening Reports

In the Flash version when users wanted to run a report, they would first have to click on the report name and then choose report filters. Now, when users click on the name of a report or saved filter, they are taken to the Report Filters page. Users can still get more information about the report or run the report with the default filters by clicking on the ellipsis button next to the name of the report.

## Changes to the Report Filters page

### Report Settings and Available Filters

As shown in **Figure 3**, the Report Settings and Available Filters are now on the same side of the page.



The image shows a mobile application interface with two tabs at the top: "Report Settings" (highlighted in orange) and "Available Filters" (greyed out). Below the tabs is a form with the following elements:

- A dropdown menu set to "Online".
- An "Output to" dropdown menu set to "PDF".
- A "Language" dropdown menu set to "English".
- Two text input fields: "User-Supplied Rpt Title" and "Account Name for Rpt Title".
- A list of checkboxes:
  - Suppress Report Parameters
  - Include Break by Date
  - Display Carbon Emissions
  - Display Alt Car/Rail Emissions
  - Use Mileage from Industry Table
  - Emissions / Mileage in Metric
- A "Carbon Calculator" dropdown menu set to "Carbon Calculator".
- A "Power Macro" dropdown menu set to "... Select ...".
- A "Convert Currency to" dropdown menu set to "US Dollar (USD)".
- An "Apply Origin/Dest Criteria at" dropdown menu set to "Leg Level".
- A blue button labeled "UDIDS" at the bottom.

**Figure 3: The Report Settings and Available Filters navigation tabs.**

# Changes to the Reporting Workspace

## Show All Button

Before, on the Report Filters page there was a **show all** button (Figure 4) that would display all the available non-advanced filters for a report. In the new Reporting Workspace, we don't have this option implemented yet (Figure 5), but we are working to get this back to show the top filters.

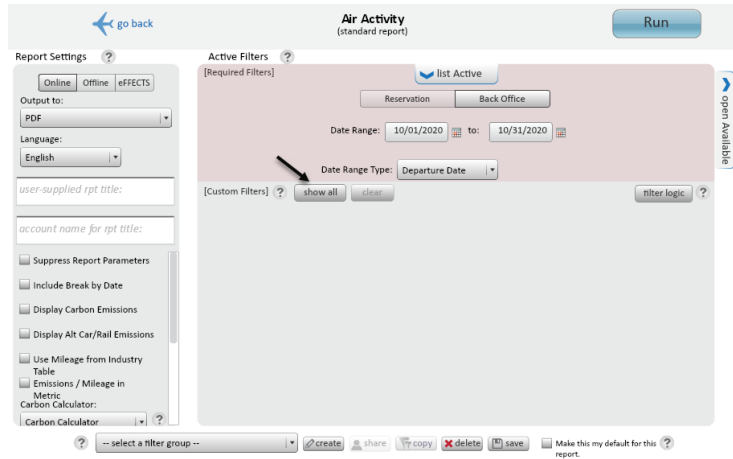


Figure 4: show all button on the previous Report Filters page.

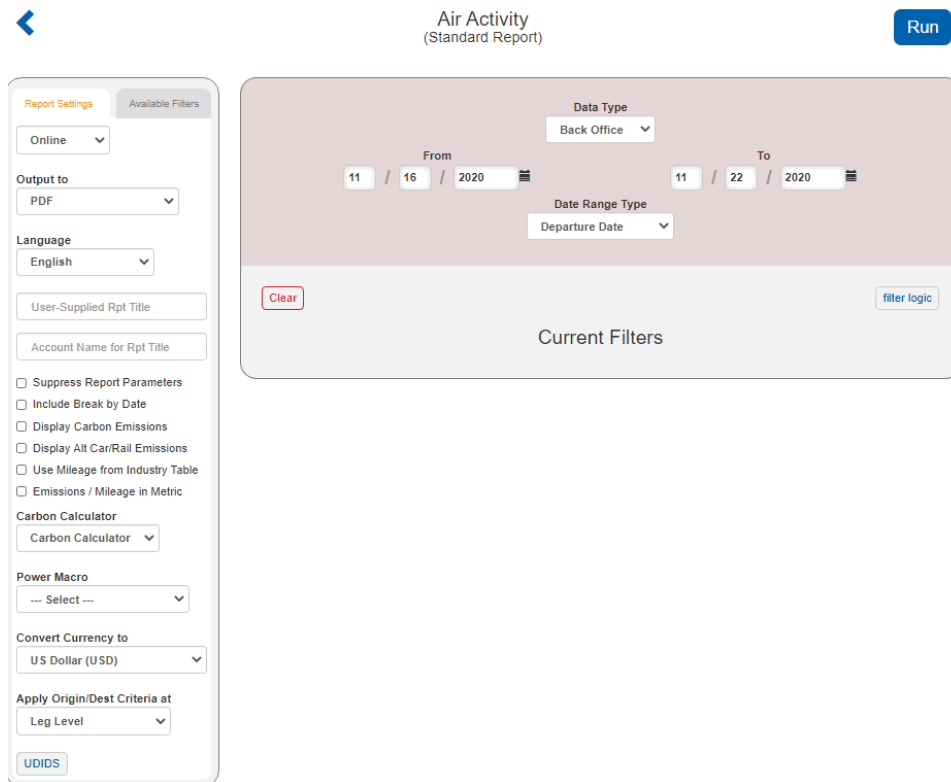


Figure 5: New Report Filters page.

# Changes to the Reporting Workspace

## Searchable Filters

Searchable filters that have a lookup table in iBank (e.g. **Account Number filter, Figure 6**) now have a search pop-up screen to search for values.

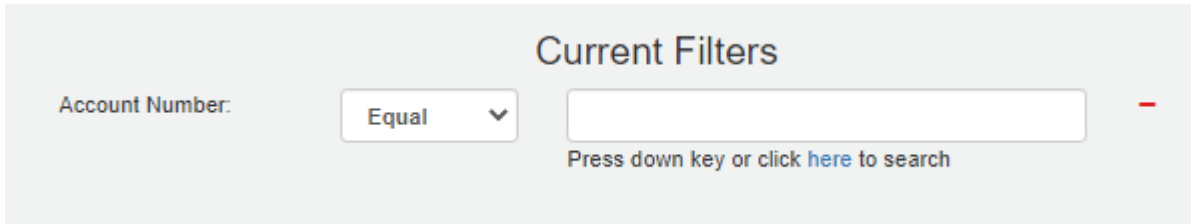


Figure 6: Account Number filter.

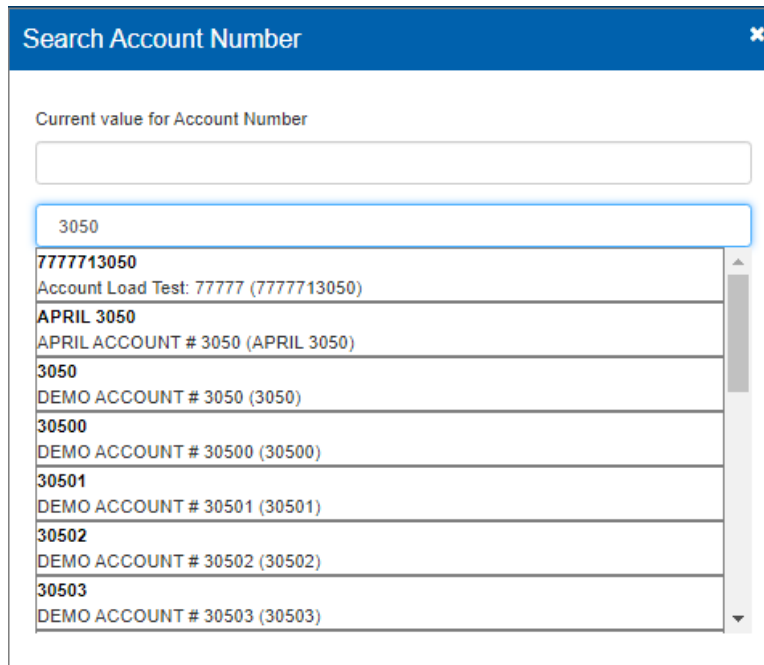


Figure 7: Search Account Number pop-up screen.

# Changes to the Reporting Workspace

## Specify UDID/Comments to Include

The **Specify UDID/Comments to Include** option (Figure 8) was renamed to **UDIDS** (Figure 9).

The screenshot shows the 'Report Settings' panel with a help icon. At the top are three buttons: 'Online', 'Offline', and 'eFFECTS'. Below is the 'Output to:' dropdown set to 'PDF', followed by the 'Language:' dropdown set to 'English'. There are two text input fields: 'user-supplied rpt title:' and 'account name for rpt title:'. A 'Table' section contains a checkbox for 'Emissions / Mileage in Metric' and a 'Carbon Calculator:' dropdown set to 'Carbon Calculator'. Below that is 'Convert Currency to:' set to 'US Dollar (USD)' and 'Apply Origin/Dest Criteria at:' set to 'Leg Level'. At the bottom is a button labeled 'Specify UDID/Comments to Include' with a help icon.

Figure 8: Specify UDID/Comments to Include option.

The screenshot shows the 'Report Settings' panel with a tab for 'Available Filters'. The 'Online' button is now a dropdown menu. The 'Output to' dropdown is 'PDF', 'Language' is 'English', and the text input fields are 'User-Supplied Rpt Title' and 'Account Name for Rpt Title'. The 'Suppress Report Parameters' checkbox is checked. Other checkboxes include 'Include Break by Date', 'Display Carbon Emissions', 'Display Alt Car/Rail Emissions', 'Use Mileage from Industry Table', and 'Emissions / Mileage in Metric'. The 'Carbon Calculator' dropdown is 'Carbon Calculator'. 'Power Macro' is a dropdown set to '--- Select ---'. 'Convert Currency to' is 'US Dollar (USD)' and 'Apply Origin/Dest Criteria at' is 'Leg Level'. At the bottom is a button labeled 'UDIDS'.

Figure 9: UDIDS option.



# Changes to the Reporting Workspace

## Tool Tips

In Flash, we had “?” tool tips for various options (Figure 10) to give users more information about a function. For a cleaner Reporting Workspace, we removed these tool tips, but we are learning how to better integrate these. If there are tool tips you found very useful, please let us know.

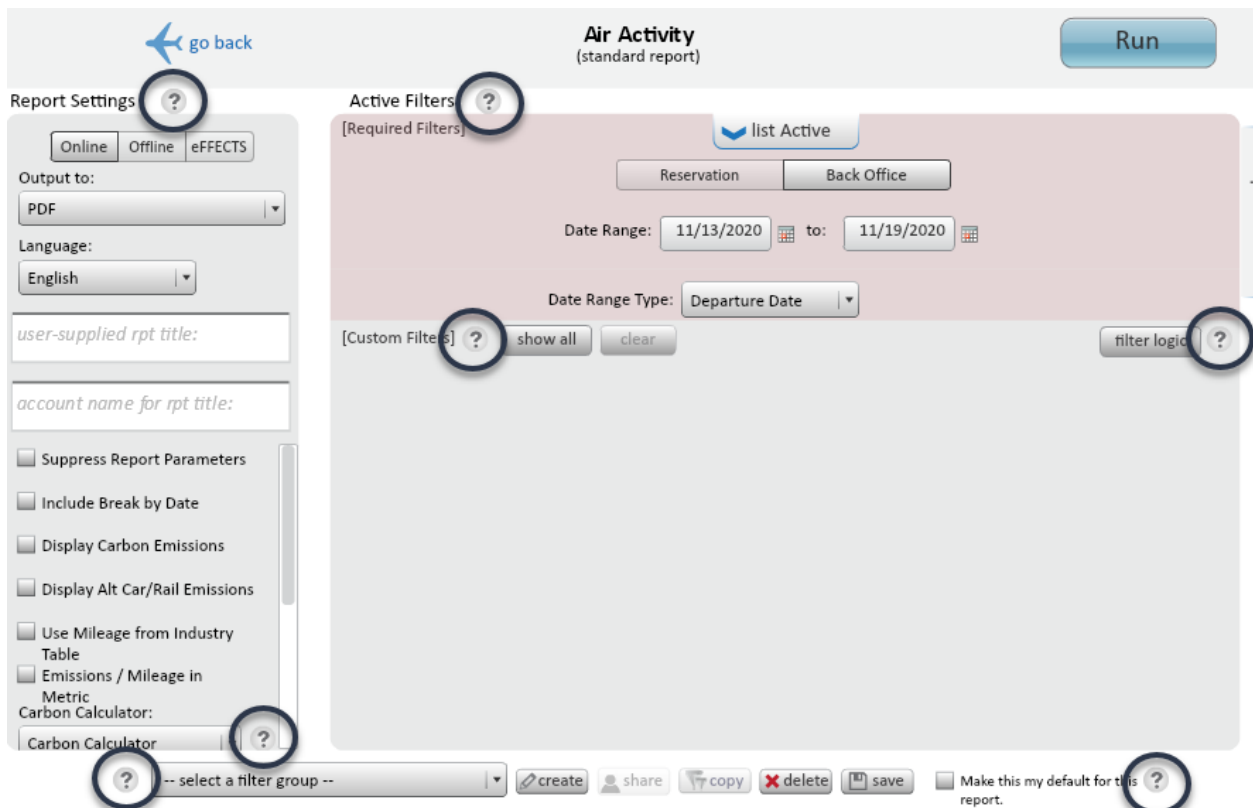


Figure 10: Tool tips in the Flash Report Filters page.

# Changes to the Reporting Workspace

## Changes to the Broadcast pages

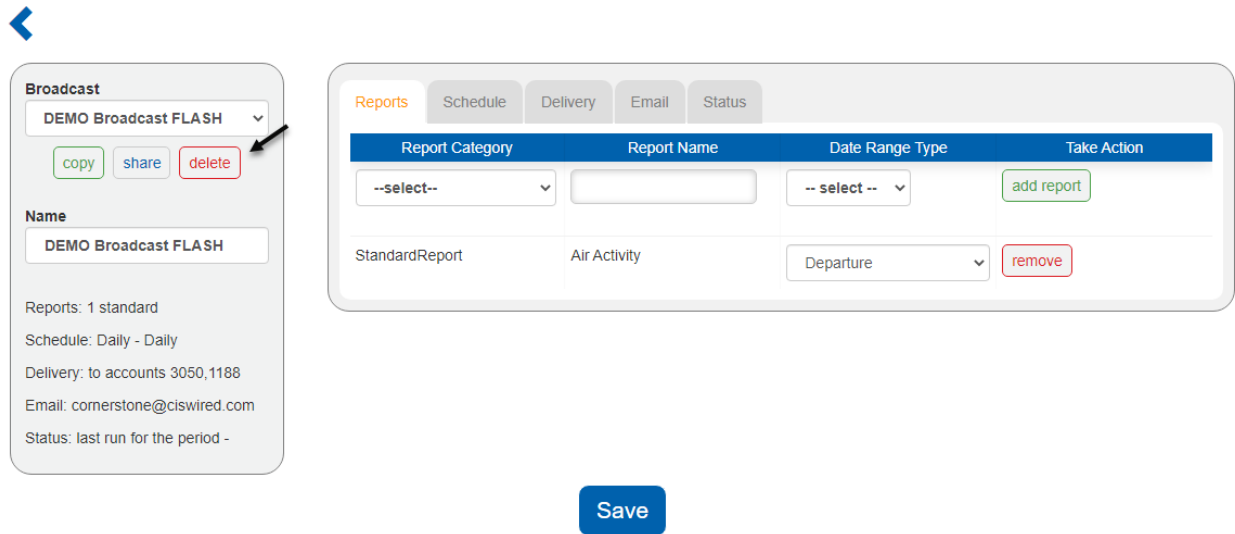
### Deleting Broadcasts

In Flash, there was a delete and edit option on the main Broadcast page as shown in **Figure 11**. Now, users can click once on the Broadcast report to open the edit page and use the delete button there (**Figure 12**).



Batch Name	Accounts	Notification Emails	Frequency	Runs on	Starts on	Last Run	Next Run	Run Status
DEMO Broadcast		siteadmin@ciswired.com			1st	01/01/1900	12/15/2020	On Hold

Figure 11: Main Broadcast page in Flash.



←

**Broadcast**

DEMO Broadcast FLASH

copy share delete

**Name**

DEMO Broadcast FLASH

Reports: 1 standard  
Schedule: Daily - Daily  
Delivery: to accounts 3050,1188  
Email: cornerstone@ciswired.com  
Status: last run for the period -

Report Category	Report Name	Date Range Type	Take Action
--select--		-- select --	add report
StandardReport	Air Activity	Departure	remove

Save

Figure 12: Broadcast edit page in the new Reporting Workspace.

# Changes to the Reporting Workspace

## Copying Broadcasts

Now, when copying Broadcasts there will be a pop-up screen after clicking copy where you can name the copied Broadcast (**Figure 13**).

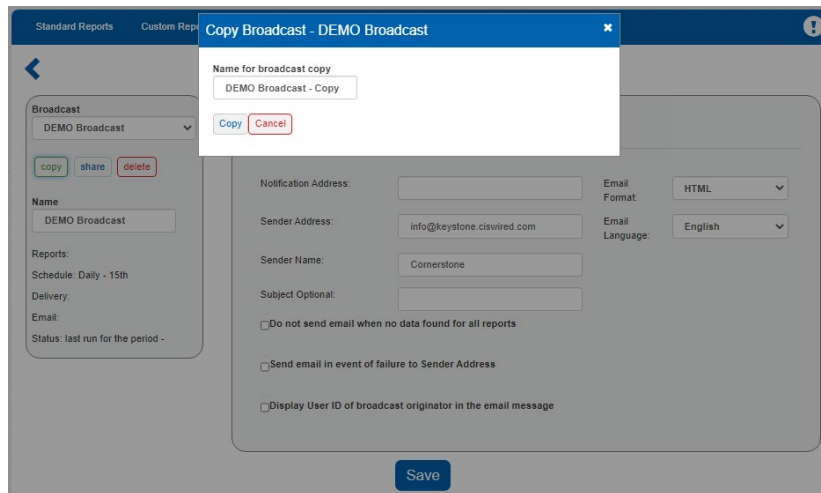


Figure 13: Copy Broadcast pop-up screen.

# Changes to the Reporting Workspace

## *Broadcast Schedules*

We cleaned up the Broadcast Schedule tab so that only the applicable frequency options would appear according to the Schedule option chosen.

- In Flash, the below options were mistakenly made available in the Frequency drop-down list when the Back Office schedule option was chosen. These frequencies did not work with the Back Office schedule, so now they are no longer an option when using the Back Office schedule.
  - Current Day
  - Daily Every X Hours
  - Daily Every X Minutes
- Schedule for: Reservation (previous day) – Now, only the “Daily” frequency option will be available when this schedule is used. In Flash, the full list of frequency options appeared, but only the “Daily” option works with this schedule.
- Schedule for: Reservation (previous week) – Now, only the “Weekly” frequency option will be available when this schedule is used. In Flash, the full list of frequency options appeared, but only the “Weekly” option works with this schedule.
- Schedule for: Reservation (previous month) - Now, only the “Monthly” frequency option will be available when this schedule is used. In Flash, the full list of frequency options appeared, but only the “Monthly” option works with this schedule.
- Schedule for: Back Office (next week) - Now, only the “Weekly” frequency option will be available when this schedule is used. In Flash, the full list of frequency options appeared, but only the “Weekly” option works with this schedule.
- Schedule for: Back Office (previous day) - Now, only the “Daily” frequency option will be available when this schedule is used. In Flash, the full list of frequency options appeared, but only the “Daily” option works with this schedule.
- We removed the “Month starts on day” and “Week starts on” elements for the Schedule options below. Through testing we found these options have no impact on the date ranges used for the report or the broadcast output.
  - YTD Back Office, run monthly
  - YTD Back Office, run weekly
  - YTD Reservation, run monthly
  - YTD Reservation, run weekly
  - MTD Back Office, run weekly
  - MTD Reservation, run weekly

# Changes to the Reporting Workspace

## Data Load Monitor

For Site Administrators, we now have a Data Load Monitor tool (**Figure 14**) that will replace the Travets Data Load Desk.

Data Load Monitor								
Previous		Page 1 of 77		20 rows		Next		
Load Date	Message	Data Source Code	GDS/Back Office ...	Type	Trips Received	Trips Removed	Net Trips Loaded	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	1	1	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	1	1	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	4	1	3	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	1	0	1	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	2	0	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	1	1	0	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	6	5	1	
▶ November, 19 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	20	18	2	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	2	0	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	3	2	1	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	0	2	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	1	0	1	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	4	1	3	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	0	2	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	1	0	1	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	2	0	2	
▶ November, 18 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	1	1	0	
▶ November, 17 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	3	3	0	
▶ November, 17 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	22	19	3	
▶ November, 17 20...	File "DEMOiqcx2...	DEMOIQCX	AP	Preview	1	1	0	

**Figure 14: Data Load Monitor**

# Changes to the Reporting Workspace

## Frequently Asked Questions

### **I do not have access to the New Reporting Workspace, what do I do?**

Please confirm you are using the iBank v5 site URL: [https://apps.ciswired.com/?AGENCY\\_CODE](https://apps.ciswired.com/?AGENCY_CODE). If not, replace 'AGENCY\_CODE' with your agency code which can be found in the URL you were using. Once you have logged in and can access the new Reporting Workspace, please update any bookmarks you have pointing to the old site URL. This is not a new URL for the new Reporting Workspace, but this is a newer URL that was communicated several years ago during the transition from iBank v4 to v5. The URL with 'ibanksystems' is the one we are trying to move away from and will soon be disabled.

### **Will I still be able to access the Flash Reporting Workspace when my iBank user is enabled?**

Users will have the ability to access the Flash Reporting Workspace and the New Reporting Workspace during user acceptance testing, but we will be removing the Flash Reporting Workspace by the end of business day on Monday, December 7th.

### **Do I have to use the New Reporting Workspace?**

We highly recommend users begin using the New Reporting Workspace once access is granted so that the transition is easy when we remove the Flash Reporting Workspace.

### **How should customers report issues?**

Please open a case with Support by emailing [support@ciswired.com](mailto:support@ciswired.com) or call Support at 812-330-4361 and after initial review the case will be routed to the Product team for resolution.

### **How will updates to the New Reporting Workspace be communicated to customers?**

If a customer has an open case with Support, then the customer will be updated through the case. We will also post updates on this [page](#).

### **When will the issue I report be fixed?**

We will address any issues to the New Reporting Workspace with priority and we will frequently update our list of known issues and resolved issues on this [page](#).

### **When will the Flash Reporting Workspace be disabled?**

We will be removing the Flash Reporting Workspace by the end of business day on Monday, December 7th.