Chapter 1
Introductory
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Before you Begin

To ensure all your browser settings are correct there are a few things you should check before you begin to use ibais.

Changing Regional Settings

To ensure the dates are displayed in local date format it may be necessary to alter the Regional settings on your computer.

Go into your computer's Control Panel and locate and select the Regional Settings option:

![Control Panel Screenshot]

Note: Overseas sites should set these options to match the local standards.
Adding the ibais Site to “Trusted Sites”

The ibais site https://ibais.com.au/ibais/ (for Bureau users) or the URL you use to access ibais (for Standalone users) needs to be added to the Trusted Site zone to function correctly. If it is not in this zone, security will stop certain functions from working correctly and, by default, pop up screens will be blocked.

Open Internet Explorer and click on “Tools” (if the menu is not visible hit the Alt key on your keyboard to reveal the menu). Select “Internet Options”. This will display the window below.

Follow the arrows below to navigate to the Trusted Sites screen and add the ibais website:
Allowing Sites for Pop Ups

Open Internet Explorer and go to the **Tools Menu**. Select **Pop Up Blocker** and **Pop Up Blocker Settings** from the menu, then add *.ibais.com.au to the list of allowed websites.

- For Bureau users: *.ibais.com.au
- For Standalone users: The URL you were given for accessing ibais

Click Add and the entry should be moved into the Allowed Sites section.

Click Close. Close your browser screen completely and open a new one to allow these new settings to take effect.
Setting up Pages in i bais

To ensure correct report printing go to Internet Explorer Page Setup Settings:

Note - changing the margins to zero forces them to set themselves back to the minimum possible margins for the default printer after you click OK.

Installing the Active-X for Report Printing

When running reports in i bais Internet Explorer requires an Active-X addon to be installed. Click here: PrintSetUp to be directed to a set up page which contains the instructions for this step.
Setting Compatibility Mode

If you don't see a login prompt here when navigating to the ibais URL above then you need to set Compatibility View. Click on the cog (shown near the ☰ at the top right of the screen.

Click Add and the website will be added into the list of Compatibility View websites here.

Your system is now set up and ready for you to log into ibais.

If you are going to be using Sunrise or SVU you should also contact the Sunrise Helpdesk or Steadfast HelpDesk for any additional set up requirements that may be needed for these systems.
How to Access the ibais System

ibais is an internet based system and therefore access is via the Internet Explorer Browser.

Open Internet Explorer and type in the internet address https://ibais.com.au/ibais/, if you are a Bureau user, or the IP address provided to you if you are a Standalone site.

Save the address as a Favourite and it will always be easily available.

Logging In

Enter the login details provided to you to log into ibais
Once you have successfully passed the security check, you will be presented with the ibais Home screen.

### How to Drive ibais

The system is driven through the ibais Home Page (shown above).

The page has a number of topic panels with links to the panel’s relevant functions.

The ibais Security system only enables access to panels and functions that you are allowed.

There is also a ★ Favourites icon which lets you incorporate your most used functions in one place.
There are a number of navigation rules for the *ibais* system:

1. **Underlined words** are hyperlinks. Any underlined word can be clicked to activate a new function (e.g., often used as a search function)

2. **Shaded boxes** in data on forms lets you drill down into the underlying data.

3. The at the top of the browser form dismisses the form.

4. Clicking on the button closes the current form and does not save data entered on that form.

**Tips**

The *ibais* system allows you to open several sessions on the one computer with one licence. In the morning, when you first log in, use **Ctrl-N** to open an additional session which you can then navigate to with **Alt-Tab** if you need to enquire on something while processing.

**F1** By pressing **F1** in any of the drop down menus or fields you can access a Help Screen. This prompts you for the information required in the drop down menu or field you are trying to input data.

**F7** By pressing **F7** in any of the input fields you can spell check on the data input.

**Ctrl F** On screens where you are searching through a listing of data (i.e., Items to allocate against in a cash receipt) you may use **Ctrl F** to search or find the required data as highlighted below. Please note this function is not available on pop up screens.

<table>
<thead>
<tr>
<th>Find</th>
<th>Previous</th>
<th>Next</th>
<th>Options</th>
<th>1 match</th>
</tr>
</thead>
<tbody>
<tr>
<td>Input</td>
<td>Account Details</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Cash Receipts**

- **Bank Account**: [Input Field]
- **Banking Location**: [Input Field]
- **Type of Cash Receipt**: [Input Field]
- **Distributor Code**: [Input Field]
- **Distributor Name**: [Input Field]
- **Amount to Allocate**: [Input Field]
- **Contact Person**: [Input Field]
- **Mary Contrary**: [Input Field]
- **Telephone**: [Input Field]
- **Business**: [Input Field]
- **Taxes**: [Input Field]
- **Executive**: [Input Field]
- **Outstanding Amt**: [Input Field]
- **Notes**: [Input Field]

**Tender Type**

- **Cheque**
- **Cheque Date**: [Input Field]
- **Cheque Amount**: [Input Field]
- **Cheque Branch Name**: [Input Field]
- **Cheque Drawer**: [Input Field]

**Cash Receipt Details**

<table>
<thead>
<tr>
<th>Reference</th>
<th>Source</th>
<th>Account Number</th>
<th>Amount Due</th>
<th>Due Date</th>
<th>Original Amount</th>
<th>Outstanding Amount</th>
<th>Allocated Amount</th>
<th>Partial Amount</th>
<th>Full Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBX34</td>
<td>1211006</td>
<td>IBX34</td>
<td>1,799.99</td>
<td>9/9/2017</td>
<td>2,780.00</td>
<td>1,152.00</td>
<td>1,152.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IBX46</td>
<td>1211006</td>
<td>IBX34</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>IBX47</td>
<td>1211006</td>
<td>IBX34</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
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Short Cuts for Date Fields

In all date fields in ibais you can use the following shortcuts:

- **T** inserts today’s date
- **-n** subtracts n days from today’s date (e.g. if today is the 15th, inputting -1 will insert 14th of the current month automatically)
- **+n** adds n days to today’s date (e.g. if today is the 15th, inputting +1 will insert 16th of the current month automatically)

**Also**, it is not necessary to input the year if the date you are inputting is in the current year. If you input 15/6 or 15 6 the system will automatically insert 15/06/08 in the date field for you.

Colour Assistance

The ibais system allows for easy recognition of the status of transactions by providing a variety of colours to denote certain information.

**Red** on a dollar amount denotes an overdue debt.

**Pink** on a dollar amount denotes that the debtor is different to the insured and that another debtor is responsible for payment (e.g. a third party broker/subagent).

**Purple** Transaction Type denotes a Quoted Premium Funding loan.

**Blue** Transaction Type and Invoice Number denotes a Converted Premium Funding loan.

**Yellow** Memo Number denotes a transaction Suspended in ibais.
Favourites

Favourites allow you to group together your most used functions into an easily accessible icon.

There are two modes in this form – Display Favourites and Display All.

The Display All / Favourites button, in “Display All” mode, shows all of the functions that the user is allowed to access under their existing security settings.

Clicking on the Yes/No field enables or disables the function as a Favourite.
Getting Help

Accessing the Manual

You can access the user manuals by clicking on the ibais Manuals icon or hyperlink on the Home screen as shown below:
The KnowledgeBais screen is displayed and from there you can access any part of the manual as required by clicking on the relevant chapter to download the pdf.

To make it easier for you to access the sections of the manual most relevant for you, we have split the User Manual. Please remember to check the Release Notes section regularly for any updates.

Title, Contents, Release Notes.pdf
Chapter 1 - Introductory.pdf
Chapter 2 - Enquiries and Processing.pdf
Chapter 3 - Claims.pdf
Chapter 4 - Task Management.pdf
Chapter 5 - Accounting.pdf
Chapter 6 - Premium Funding.pdf
Chapter 7 - Reporting.pdf
Chapter 8 - Sunrise.pdf
Chapter 9 - General Ledger.pdf
Chapter 10 - Administration.pdf
Appendix - APRA Data Collection and Reporting.pdf
Index.pdf
Setting Up a Computer for the New Ibais Webserver.pdf

Logging a Support Call
Select the database in which the issue occurred.

Your contact details:
- Name: [User's Name]
- Contact Number: [User's Contact Number]
- Email: [User's Email]

Select the priority of the issue (See guidelines below).

Select a category for the type of issue:
- [List of categories]

Input as much detail as possible to assist the support team in investigating and resolving the issue.

You can upload up to three attachments (such as screen shots showing error messages or examples of reports).
Guidelines for selecting the priority of a support call.

**Critical:** The entire system is unavailable or its use is severely restricted and there is no workaround. All users affected.

**High:** An essential component of the system is not working, or is not working correctly, or is working with limited functionality and there is *no* workaround. Most users or important business function affected.

**Medium:** An essential component of the system is not working, or is not working correctly, or is working with limited functionality and there *is* a workaround.

**Low:** A non-essential component of the system is not working correctly or only one or a small number of policies are affected. One or a small number of users affected.

Once your call is logged you will be sent an email acknowledgement with a support call reference number and a summary of the details you have submitted.