

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 **bais**.

Changing Regional Settings

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

Go into **Control Panel**. This can be done by clicking on the "**Start**" button then Clicking on **Control Panel**. See image below.



If this is your 1st time in Control Panel, then it will most likely look like the following (Windows XP only). Click "**Switch to Classic View**" as it's easier to navigate.



Once this is done, the Control Panel will look like the picture below (this is standard on all operating systems besides Windows XP). Here we click on "**Regional and Language Settings**".



This will open up a new window. Here you select both the options under "**Regional Options**" and change them so the 1st one is set to "**English (Australia**)" and the 2nd one to "**your location**". Then click **Apply**, and your regional settings will be changed.

tandards and	g rormats ffects how some programs format numbers, currencies,
dates, and tir	
	n to match its preferences, or click Customize to choose
English (Aus	
Samples	
Number:	123,456,789.00
Currency:	\$123,456,789.00
Time:	10:16:25 AM
Short date:	24/05/2006
Long date:	Wednesday, 24 May 2006
	ces provide you with local information, such as news and ct your present location:

Click on the "Customize" button which will show the following window. Click on the Date tab to open this screen.

Customize Regional Options	
Numbers Currency Time Date	
Calendar	
When a two-digit year is entered, interpret it as a year between:	
1930 and 2029	
Short date	
Short date sample: 04/10/06	
Short date format: dd/MM/yy	
Date separator: /	Where the "Short data format" and "Long
	Where the "Short date format" and "Long date format" are, make sure they are in
Long date Long date sample: Wednesday, 4 October 2006	Australian format: "day/month/year" as
Long date sample. Wednesday, 4 October 2000	shown here.
Long date format: dddd, d MMMM yyyy	
OK Cancel Apply	

Click on **Apply** and then click **OK** to close all the windows.

Adding the **bais** Site to "Trusted Sites"

The bais site https://designbais.bais.com.au (for Bureau users) or the IP address you use to access

bais (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.

The following explains the correct settings and how to add a site into the "**Trusted Sites**" in Internet Explorer 6 and 7.

Open Internet Explorer and click on "**Tools**". Select "**Internet Options**". This will display the window below. Click on the "**Security**" tab.

Internet Options	
General Security Privacy Content Connections Programs Advanced	
Select a zone to view or change security settings.	
N S S S S S S S S S S S S S S S S S S S	Olisha and the "Trusted
Internet Local intranet Trusted sites Restricted sites	Click on the "Trusted sites" icon.
Trusted sites Sites This zone contains websites that you trust not to damage your computer or your files. You have websites in this zone. Security level for this zone Security level for this zone Allowed levels for this zone: All	The "Security level for this zone" should be set to "Low". In Internet Explorer 6 this is the default level, so if not set to low it can easily be changed by clicking on the "Default level" button.
- Minimal safeguards and warning prompts are provided - Most content is downloaded and run without prompts All active content can run Appropriate for sites that you absolutely trust	In Internet Explorer 7 this is not the default level so it will need to be changed.
Cystom level Default level Reset all zones to default level	
OK Cancel Apply	

Now click on the "Sites" button above which will bring up the following window.

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You may or may not already have sites listed. **Close** this window and apply the settings on the previous window.

Deselecting the Re-Use Windows Option

After setting Trusted Sites and returning to the Internet Options screen, click on the **Advanced** tab as shown below.



To ensure these changes take effect immediately, it is suggested that you close the current Browser and start a new one.

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.

o-up Blocker Settings	
Pop-ups are currently blocked. You can allow websites by adding the site to the list below. Address of website to allow:	/ pop-ups from specific
*.bais.com.au	Add
Allowed sites:	
*.nsw.gov.au	Remove
Notifications and filter level	
🗹 Play a sound when a pop-up is blocked.	
Show Information Bar when a pop-up is blocked.	
Filter level:	
Medium: Block most automatic pop-ups	Y
Pop-up Blocker FAQ	Close

As shown above in the "Address of website to allow", add the following:

For Bureau users: *.bais.com.au

For Standalone users: The IP address you were given for accessing bais

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.

How to Access the bais System

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

Call up Internet Explorer (you will need Version 6 or later) and type in the internet address www.designbais.com/baweb, 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.

bais does not have a continuous connection to your server and we advise you to open a session in the morning and leave it minimised – then when you need it you can simply maximise the browser and start entering details.

Logging In

When you browse to the **bais** home page, you will be required to enter your **User name** and **Password**.

Connect to desi	gnbais.bais.com.au	? 🔀
R	E	K
designbais.bais.co		(22)
User name: Password:		
	Remember my password	Cancel

Enter the UserID and password you were provided with. Bureau users will be prompted (when you log in for the first time) to change your password on the following screen:

1 1 BRI	Input your Old password first and then the New one.
Change Your Password	Create a password that is unique and not easy for others to guess. Avoid
Old password : New password : Confirm new password : Change Password	names of family members and try to use a combination of alpha and numeric. This is your secure access to the system, so treat it as you would a pin number.

Click on the **Change Password** button to continue.

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 Password changed

 Your password has been changed. Please click here to enter the site.

 Click here to continue into the web enquiry system.

When the password is successfully changed the following screen is displayed:

Once you have successfully passed the security check, you will be presented with the first **bais** form.

When this screen is displayed, you can use F11 to remove the unnecessary toolbars and make the system full screen. (Pressing F11 again reverses this, if required.)

Home	Account Selection Change Password Logout		
bai	5	SINGAPORE	
INSURANCE SOFTWAI	RE	Welcome: Jir	n Armstrong
BA Insuran	ce Systems		
			*
			Favourites
Task Manac	lement	Insurance	
	Manage all of your business contacts and activities from within Task Management. The system can generate business related tasks eg upcoming renewals and you can enter tasks.		Access all of your insurance processing functions and insurance, client and insurer enquiry routines. Premium Funding is also available here.
	Task Management		Insurance
Claims		Accounting	
	Enter and enquire on all claims related matters: claims registration, establishment and management of reserves, payments to parties involved in the claim, claims review processes and management information. <u>Claims</u>	Par la	Access a fully integrated suite of financial and administrative processes including receipting, payments, cheque write backs and journals. Also enquire on clients, insurers, sub-agents and general ledger accounts.
Administrat	tion	Knowledge E	schange
	This is a restricted zonel Maintenance of the BA system files and user security is undertaken here. All rates tables are updated from within this zone.		Links are provided to system documentation and to the iNavigator Knowledge management potal. Links are also provided to the BA download area for selected BA software. Ernail : support@bais.com.au Phone : +612 99341888 Fax : +61299341889
Powered by DesignBais	5		

How to Drive bais

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

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

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



icon which lets you incorporate your most used functions in one place.

There are a number of navigation rules for the new system:

1.	The TAB key replaces the Enter key. The TAB key submits the data to the browser for processing.
2.	<u>Underlined words</u> are hyperlinks. Any underlined word can be clicked to activate a new function.
3.	Shaded boxes in data on forms lets you drill down into the underlying data.
4.	The 🔯 at the top of the browser form dismisses the form.
5.	Clicking on the Previous button closes the current form and does save data entered on that form.

not

Tips

The **bais** 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.

ne Accou	nt Selection C	iange Password All Options	Favo	urites	Logout			
Cash Receipts						Submi	t Clear	
<u>Bank Account</u> Banking Location Type of Cash Receipt	050 Select Debtor Recei	Name of Bank		Curr	ency AUD			
Debtor	Debtor		me		iount to locate	Contact Perso Telephone	n 02 9955 9955	
	SUB-NE	T Net Paying Sub Agent		, e	iocate 🔺	Business	45	2
<u>Tender Type</u> Date Amount Bank	CHEQUE	Cheque AUD AUSTRALIAN DOLLAF		Find Find what: smi	- Die	Outstanding A	mt 323280.*	
Branch Name Drawer	SYDNEY Aardvark Enti	erprises		Match case	14 C C C C C C C C C C C C C C C C C C C	<u>U</u> p		
Cheque Number			1					
Vet Paying Sub Agent						Al	location 1 of 1 (SU	IB-NET)
Previous	Next	suto Allocate					otal Tendered mount to Allocate	0.00
l l	e Source	Insured	Class	Due Date	Original Amount	Outstanding Amount	Allocated Partial Amount Payme	
Document Referenc	e source							
114 0510001	3 Broking	Googly Bear Toys and Gifts Pty Ltd	PBI	15/08/2005	1,062.60			
I14 0510001 I15 0510001	3 Broking 4 Broking	Googly Bear Toys and Gifts Pty Ltd	РНН	19/08/2004	756.66	756.66		
114 0510001 115 0510001 135 0510001	3 Broking 4 Broking 4 Broking	Googly Bear Toys and Gifts Pty Ltd Googly Bear T <mark>o</mark> ys and Gifts Pty Ltd	РНН РНН	19/08/2004 19/08/2005	756.66 910.85	756.66 910.85		
I14 0510001 I15 0510001	3 Broking 4 Broking 4 Broking 1 Broking	Googly Bear Toys and Gifts Pty Ltd	РНН	19/08/2004	756.66	756.66 910.85 850.16		

Short Cuts for Date Fields

In all date fields in **bais** 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 **bais** 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)

Memo No	< Type	EndNo	Reason	Policy Number	u/w	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07120008	<< Pol	07000	New Business/Existing (To Be Advised	ALLIANZ	A	01/10/07	01/10/08	13332	1716.66	1716.66	1606.66	1606.66

Purple Transaction Type denotes a Quoted Premium Funding Ioan.

Merno No	<	Туре	EndNo	Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07050105	<<	PolQ	07000	TEST	PHD000086	ROYAL	A	01/07/07	30/06/08	I21651	1957.60	0.00	1759.60	0.00

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

Memo No	1.00			Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07040008	<<	End F	07006	Existing New Business I	PHD000041	ROYAL	A	01/04/07	31/03/08	21378	1957.60	1957.60	1759.60	1759.60

Yellow Memo Number denotes a transaction Suspended in bais.

Merno No	< Type	EndNo	Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07110031	<< Pol	07000	New Business Renewable	To Be Advised	CGU	A	14/11/07	14/11/08	122701	926.50	926.50	816.50	816.50

Orange Memo Number denotes a transaction Suspended in SBClient.

Memo No	>	Туре	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07100001		End	JAY	TEST	12345	ALLIANZ	A	01/10/07	01/10/08	13296	0.00	0.00	0.00	0.00

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.

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

Type Category and **Sub Category** dropdowns allow you to select the items that appear on the Favourites report.

Home Account Se	election Change Password L	ogout										
Available Forms and Reports												
Type Select Type 💌	Category Select	Category 💉	Sub Category Select Sub Category 💌									
Favorites												
Туре	Category	Sub Category	Form/Report (Click to Run)	Image	Favorites							
Administration	Users and Security		User Administration		Yes							
Broking	Processing		Client Enquiry and Policy Processing		Yes							
Task Management	Processing		Tasks and Notes Entry		No							
Refine by Description	Ref	ine										