# Chapter 1

# Introductory

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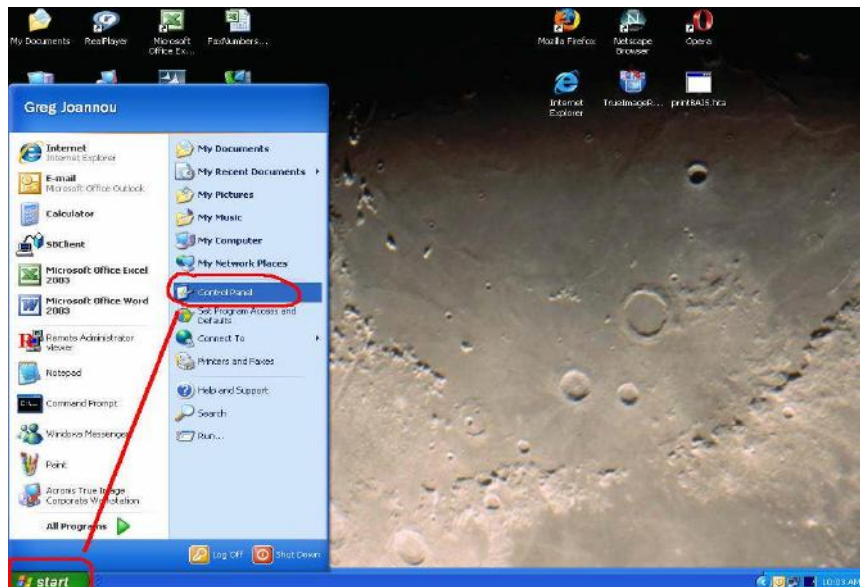# Chapter 1 - Introductory

## 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 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.
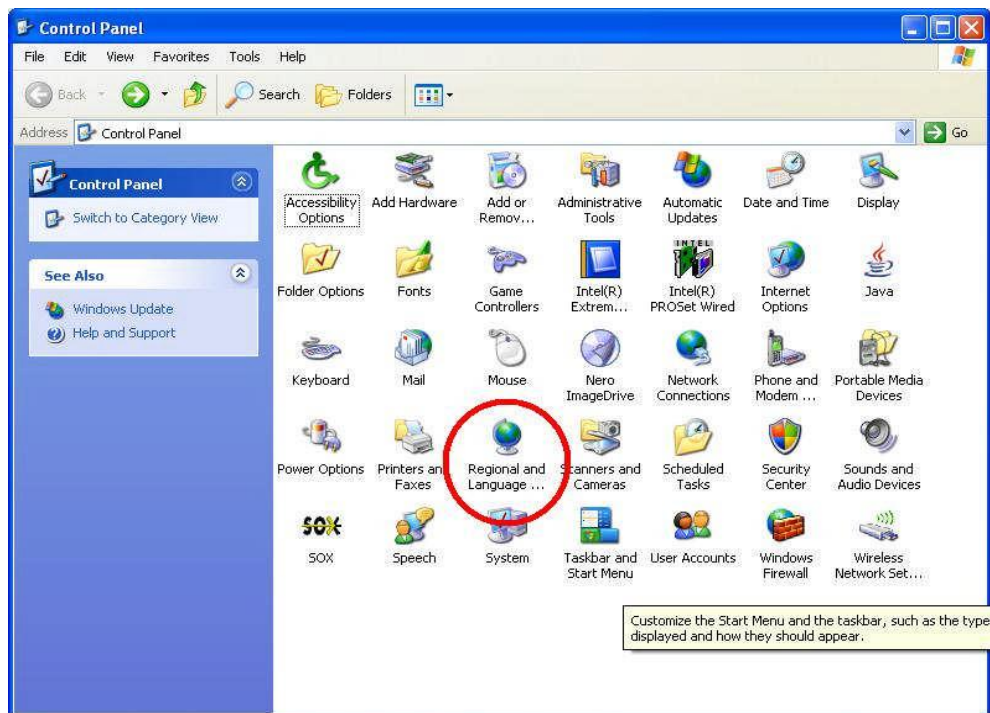


If this is your 1st time in Control Panel, then it will most likely look like the following (Windows XP only). Click "**Switch to Classic View**" as it's easier to navigate.
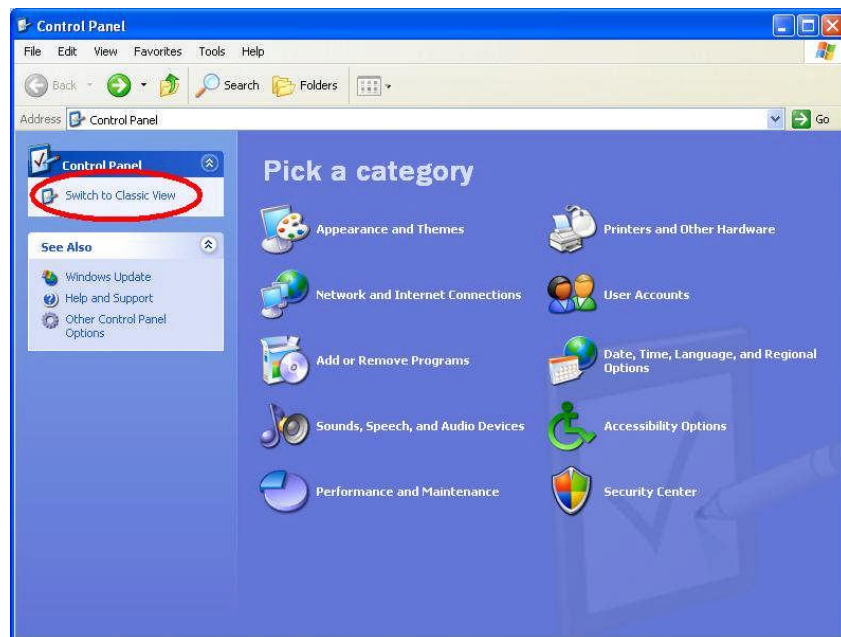
Once this is done, the Control Panel will look like the picture below (this is standard on all operating systems besides Windows XP). Here we click on "**Regional and Language Settings**".

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.
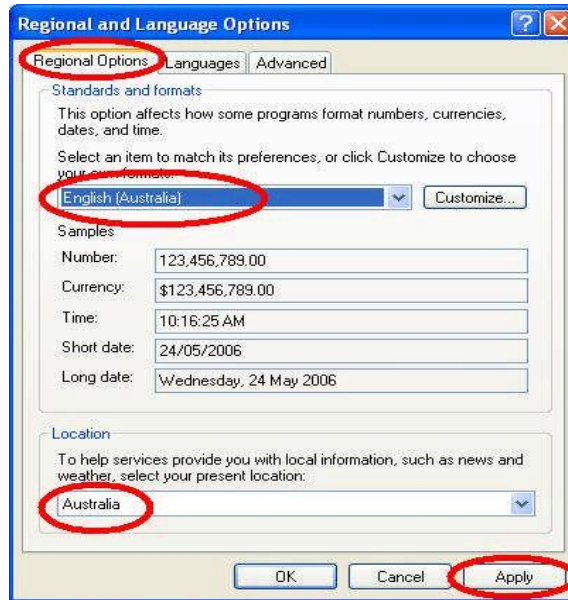


Click on the "**Customize**" button which will show the following window. Click on the **Date** tab to open this screen.
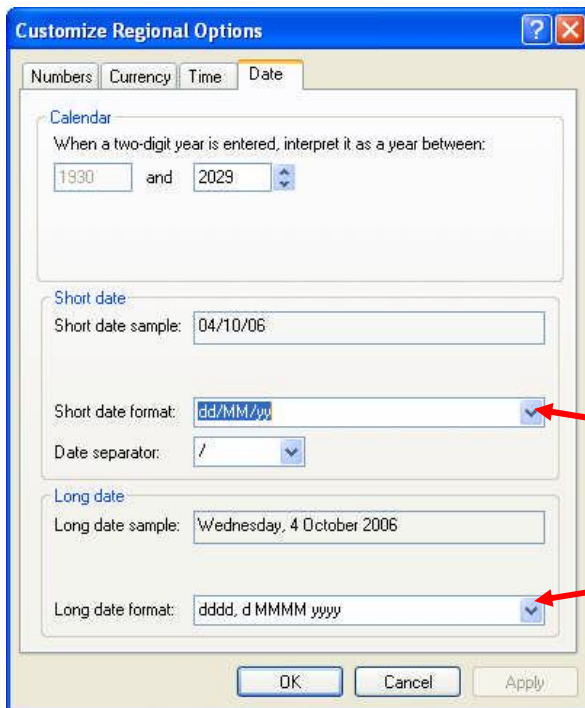


**Where the "Short date format" and "Long date format" are, make sure they are in Australian format: "day/month/year" as shown here.**

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

# Adding the **ibais** Site to "Trusted Sites"

The **ibais** site https://designbais.bais.com.au (**for Bureau users**) or the IP address 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.

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.
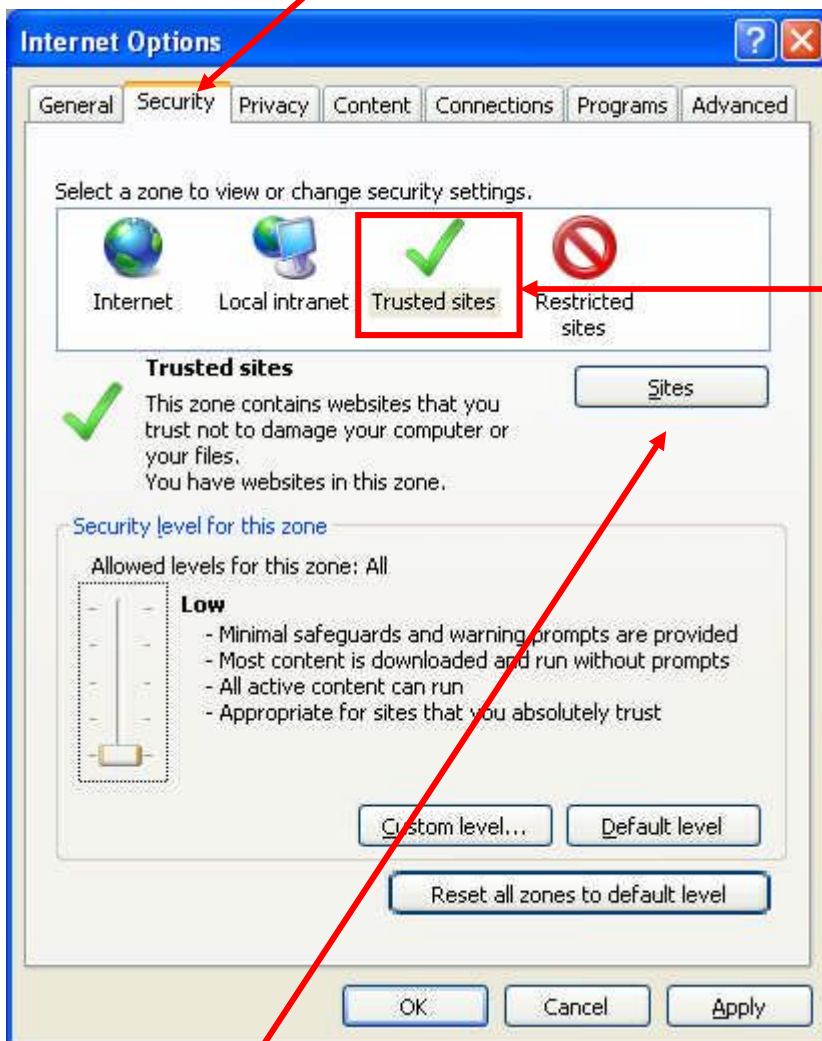


**Click on the "Trusted sites" icon.**

**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.**

**In Internet Explorer 7 this is not the default level so it will need to be changed.**

Now click on the "**Sites**" button above which will bring up the following window.
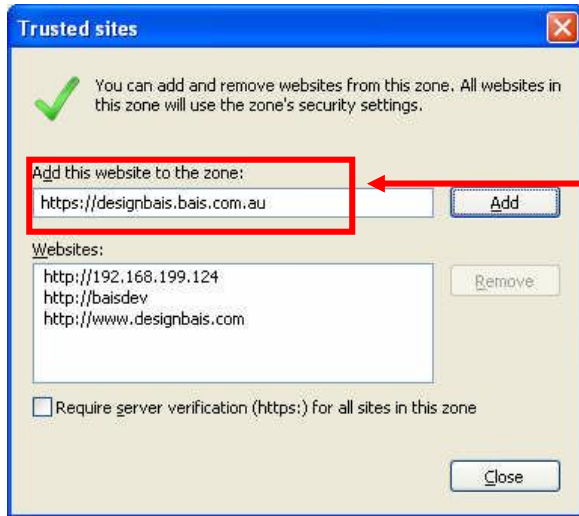
To add a new site simply type in the web address in the space provided next to the **Add** button. Once you have typed it and **double checked the spelling** click on **Add**.

**Remember:**
if you are a Standalone user this will not be the address shown here – substitute the IP address you were given to access

**ibais**.

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.
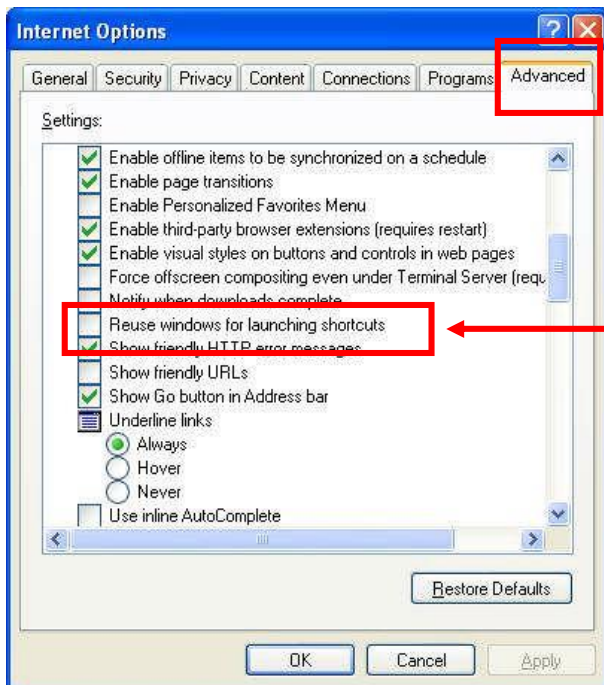


Ensure that the option highlighted here is **NOT** selected/ticked.

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.



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 **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.

# How to Access the **i**bais System

**i**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**.
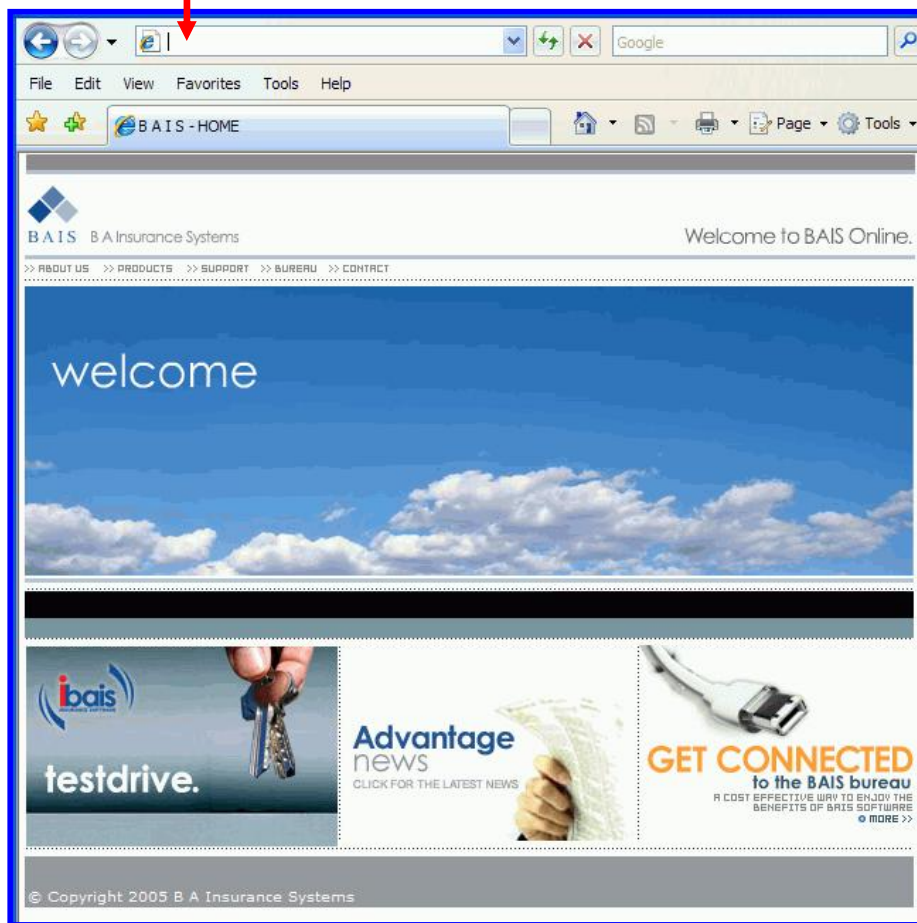


Save the address as a **Favourite** and it will always be easily available.

**i**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 **ibais** home page, you will be required to enter your **User name** and **Password**.



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:



Input your **Old password** first and then the **New** one. Create a password that is unique and not easy for others to guess. Avoid 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.

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



Click **here** to continue into the web enquiry system.

Once you have successfully passed the security check, you will be presented with the first **ibais** 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.)
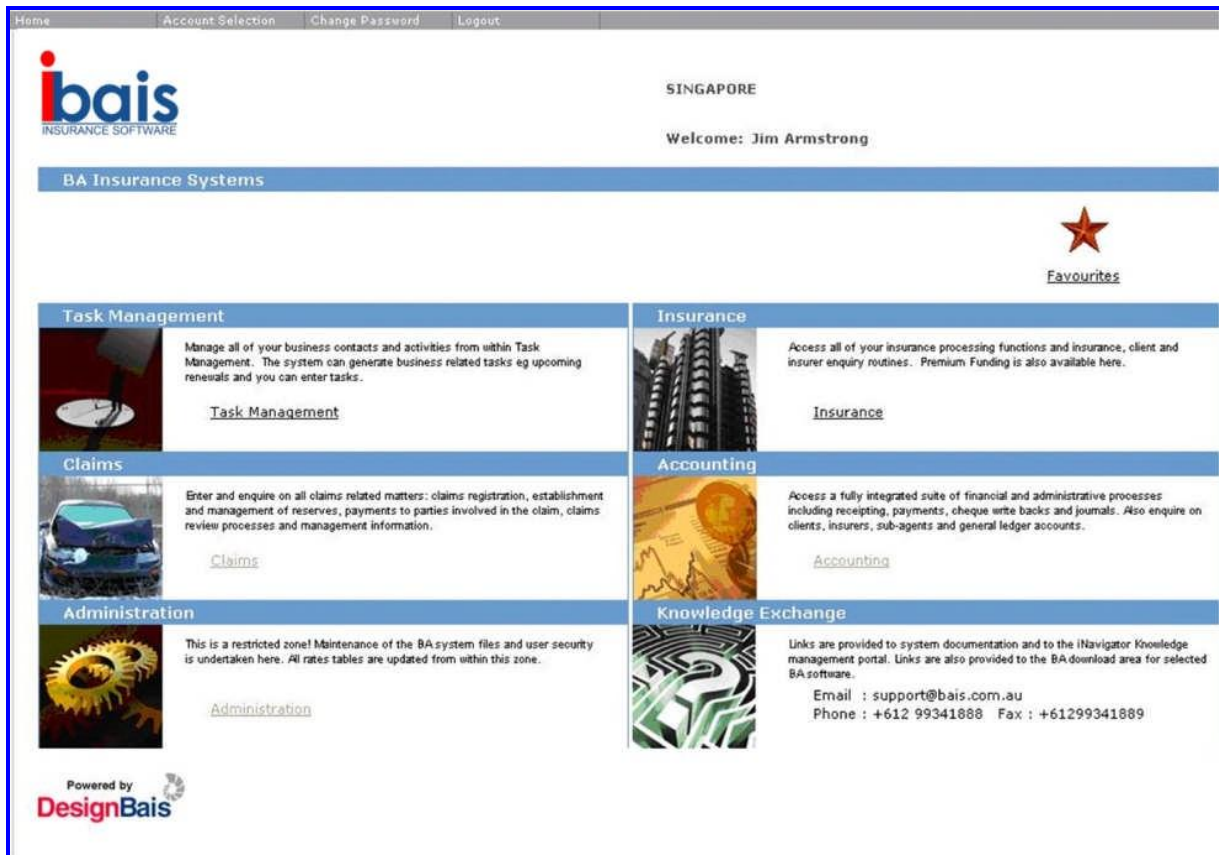
# How to Drive **ibais**

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  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.    **Underlined words** 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  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.



## 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**.

| Memo No | > | Type | 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 05100030 | >> | Ren | PBI | Blues Road, Sydney | To Be Advised | ROYAL | A | 15/10/07 | 15/10/08 | I223 | 4688.98 | 4688.98 | 4328.18 | 4328.18 |

**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 C | To Be Advised | ALLIANZ | A | 01/10/07 | 01/10/08 | I3332 | 1716.66 | 1716.66 | 1606.66 | 1606.66 |

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

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 07050105 | << | Pol Q | 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 loan**.

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 07040008 | << | End F | 07006 | Existing New Business N | PHD000041 | ROYAL | A | 01/04/07 | 31/03/08 | I21378 | 1957.60 | 1957.60 | 1759.60 | 1759.60 |

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

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 07110031 | << | Pol | 07000 | New Business Renewable | To Be Advised | CGU | A | 14/11/07 | 14/11/08 | I22701 | 926.50 | 926.50 | 816.50 | 816.50 |

**Orange** Memo Number denotes a **transaction Suspended in SBClient**.

| Memo No | > | Type | 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 | I3296 | 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.