

INFO ANALYZER

What You Need to KNOW	What You Need to DO
<p><u>Purpose:</u></p> <p>The purpose of these procedures are:</p> <ul style="list-style-type: none">• To select Info Analyzer as your online report viewer• To print a report from Info Analyzer• To search for data within a report using Info Analyzer's Search Expert• To customize a report to display only select data using Info Analyzer's Select Expert• To export a report from Info Analyzer into another application <p>(For information on scheduling and viewing a report, see the SCHEDULING AND VIEWING REPORTS Job Aid)</p> <p>(For information on installing or upgrading Info Analyzer on your workstation, see the "Reporting Tool" chapter in the EAGLS User Guide)</p> <p><u>Benefits</u></p> <ul style="list-style-type: none">• Using Info Analyzer provides you with the following benefits:<ul style="list-style-type: none"><u>Faster Downloads</u> Compresses data significantly to enable report contents to be transmitted faster. Eliminates problems caused by poor server connections, slow modem lines, and system timeouts.<u>Online Report Archiving</u> Provides you with the options to view downloaded reports right away or save them to a local or network drive. There is no need to stay connected to EAGLS while viewing downloaded reports.<u>Better Report Presentation</u> Provides a range of formatting options that improve the readability of reports.<u>Customized Reports</u> Includes Export, Search, and Select Expert functions that provide you with enhanced capabilities to navigate through lengthy reports and manipulate report data.	<p>SELECT INFO ANALYZER AS YOUR VIEWER (instructions for selecting IA as viewer from Default, Details, and Reschedule windows)</p> <p>PRINT A REPORT FROM INFO ANALYZER You can use Info Analyzer to print your reports to a local printer.</p> <ol style="list-style-type: none">1. Click on the Printer icon from the menu bar. <i>Note: If your Printer icon appears to be shaded out, do the following:</i><ol style="list-style-type: none">A. Click on File from the Menu bar and then click on Printer Setup. <i>Result: The Printer Setup window displays, with the No Printer checkbox selected.</i>B. From the Printer Setup window, click in the No Printer checkbox. <i>Result: The check is removed.</i>C. Click on the radio button beside Landscape. <i>Result: The print layout is changed to landscape orientation.</i>D. Click on the OK button. <i>Result: The report refreshes and the Printer icon is highlighted. The report is now available to print.</i>2. The Print dialogue box displays. Click on the OK button. <i>Result: The report will print to your local printer.</i>

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<p><u>Features:</u></p> <ul style="list-style-type: none"> • Info Analyzer is a report viewing software package that was created to assist agencies in downloading and viewing large reports. • Info Analyzer is available at no cost to your agency. (However, it is only available for installation and use in your agency with the acceptance of your agency's program manager and Information Security team.) • Info Analyzer contains the following functions to help you move around easily in lengthy reports while viewing them online: <ul style="list-style-type: none"> • <u>Group Tree</u> – A directory tree of a report that contains a listing for every hierarchy level or group in the report, allowing you to view specific sections of the report without scrolling through the report. The tree can be expanded and collapsed to view different levels within the reporting structure. The Group Tree displays on the left side of the report preview and can be turned on or off from the toolbar. • <u>Drill Down</u> – A report viewing option that allows you to select a specific hierarchy level or group from a report's Group Tree. This creates a new tab on the report window that displays <i>only</i> the report data for the hierarchy or group you selected. (The tab can be deleted when you are finished viewing the drill-down data, without changing the original report.) A magnifying glass icon next to a listing on the Group Tree indicates that the drill-down function is available for that level of information. • <u>Zoom Control</u> – A viewing option that allows you to magnify or shrink a report as it appears in the report preview window. You can use this option to zoom in on a specific section of a report, or to pan out for a birds' eye view of the report. • <u>Search Expert</u> – A search window that allows you to enter search criteria for a specified report field, and then jump to the specific field containing the data that matches the search criteria. This saves you time scrolling through reports online looking for data. <p>(For more information, see the "Reporting Tool" chapter in the EAGLS User Guide)</p>	<p>SEARCH FOR DATA USING THE SEARCH EXPERT</p> <p>The Search Expert is a search capability you can use to locate specific information in a report. For example, if you want to find a particular account holder from a long list of names on an Account Listing Report you can use this function.</p> <ol style="list-style-type: none"> 1. Click on the Search icon (binoculars) from the task bar. <p><u>Result:</u> The Search Expert box displays.</p> <ol style="list-style-type: none"> 2. Click on New on the right side of the screen. <p><u>Result:</u> The Choose Field box displays.</p> <ol style="list-style-type: none"> 3. Scroll to the right until Agency Name is visible, and then scroll down until the desired field is visible (i.e., Last_Name). 4. Click on the desired field. 5. Click on the OK button. 6. In the first dropdown list box, select the "is" option. 7. In the second drop down list, select the desired value. Available values include: <ul style="list-style-type: none"> ◇ Any value ◇ Equal to ◇ One of ◇ Less than ◇ Greater than ◇ Between ◇ Starting with ◇ Like ◇ Formula <p><u>Result:</u> The value selected displays and a third drop-down list box displays.</p> <ol style="list-style-type: none"> 8. In the third box, select the desired search criteria based on the field you chose, or click in the text field and type the desired search criteria based on the field you chose. <p>For example:</p> <p>Select the "Starting With" value in the second drop down box. A third window with a drop down list displays. Type the last name or first letter of the last name capitalized in the box.</p>

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<ul style="list-style-type: none"> • In addition, Info Analyzer contains the following functions that make it easy to print and customize your report data: <ul style="list-style-type: none"> • <u>Print</u> - allows you to print reports to your local printer. • <u>Record Sort Order</u> - allows you to change the order in which records appear in a report. <p style="margin-left: 20px;"><i>Note: This is a separate sorting function from the sorting options you selected when scheduling the original report, and can be used to enhance or change the display of data on your report.</i></p> • <u>Select Expert</u> – allows you to select specific records or groups that you want to display in the report. This allows you to filter data and produce customized reports. • <u>Export</u> – allows you to save report data in a variety of file formats, including text, html, rich text, data-interchange format, and comma-separated values. These files can then be imported into other spreadsheet, database, and word processing applications for further customization. <p style="margin-left: 20px;"><i>Note: This is a separate function from the report viewer selection you made in the Reporting Tool, and can be used to change the initial format in which a report was run without having to reschedule the report.</i></p> <p style="margin-left: 20px;">(For more information, see the “Reporting Tool” chapter in the EAGLS User Guide)</p> <p><u>Rules:</u></p> <p>The following rules apply to these procedures:</p> <ul style="list-style-type: none"> • Info Analyzer can be downloaded from the GCSU Technical Help Desk Web site. While in EAGLS, click on the Help Main Menu function. Once connected to the THD home page, click on the Reporting Tool menu hyperlink and follow the online directions under the Info Analyzer hyperlink. • You can only install and use Info Analyzer if it has been accepted for use in your agency by the program manager and Information Security team. If you are unsure that your agency is utilizing Info Analyzer, contact your agency program manager or the Bank of America account manager. 	<p>9. Click on the Search button. The screen will refresh and jump to the report page containing the desired search value and highlight the area of the criteria selected with the box.</p> <p>10. To remove the Search Expert, click on the Search button (binoculars) on the task bar.</p> <p><u>Result:</u> The Search Expert box displays.</p> <p>11. Click on the DEL button on the right hand side of the box.</p> <p><u>Result:</u> The Search criteria disappears.</p> <p>12. Click on the Search button to refresh the box.</p> <p><u>Result:</u> The Search Expert disappears and the search criteria are removed.</p> <p>CUSTOMIZE A REPORT TO DISPLAY SELECT DATA</p> <p>The Select Expert provides you with the capability to extract specific information from a standard report and create a customized report. For example, if you want to scale down the Account Activity Report to show only ATM transactions, you can use the Select Expert to extract these transactions from the original report.</p> <ol style="list-style-type: none"> 1. Click on the Select Expert button (hand with objects) on the task bar. <p><u>Result:</u> The Choose Field box displays.</p> <ol style="list-style-type: none"> 2. Scroll down until the desired field is visible and click on this field. 3. Click OK. <p><u>Result:</u> The Select Expert dialogue box displays.</p> <ol style="list-style-type: none"> 4. In the first drop-down list, select the “is” option. 5. In the second drop-down list, select the desired value. 6. In the third drop-down list, select the desired search criteria based on the field. 7. Click OK. <p><u>Result:</u> The screen refreshes and redeposits your report based on the sort criteria you</p>

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<ul style="list-style-type: none">• If your agency's firewalls do not permit downloading the Info Analyzer program from the internet, you can obtain a copy of the program on CD-ROM. Contact your Bank of America account manager.• Suggested uses for customizing reports (Hiding report fields to shorten reports)	<p>your report based on the sort criteria you selected.</p> <p>EXPORT A REPORT FROM INFO ANALYZER</p> <p>The export function provides you with the capability to change the format of your reports from Info Analyzer to a more widely used application, such as MS Excel, MS Word, or HTML.</p> <ol style="list-style-type: none">1. Click on the Export button (envelope with the downward red arrow) on the task bar. <p><u>Result:</u> The Export dialog box displays.</p> <ol style="list-style-type: none">2. In the Format drop-down list, click on the desired format.3. In the Destination drop-down list, click on the desired destination. <p><u>Result:</u> The desired destination displays.</p> <p><i>Note: Disk File allows the report to be saved on a disk and on the hard drive.</i></p> <ol style="list-style-type: none">4. In the Choose Export File, select where you want to save the document. <p>Example: Type C:\My Documents, and then remove the default name and choose the desired name for the report.</p> <ol style="list-style-type: none">5. Click on the Save button. The report is saved in the desired format and location.6. To view the Exported report, locate the report where you selected it to be saved. Open the report using the appropriate steps.

INFO ANALYZER

Show/Hide Report field

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<p><u>Purpose:</u> The purpose of this procedure is:</p> <ul style="list-style-type: none">• Hide selected field for an online report• View specific information within your report <p><u>Rules:</u> The following rules apply to this procedure:</p> <ul style="list-style-type: none">• This function can only be used when using Info Analyzer as your viewer.• When report fields are suppressed, the info Analyzer Drill Down option becomes unavailable.	<p>Show /Hide a Report Field</p> <ol style="list-style-type: none">1. Once you are viewing the report, locate view on the Tool Bar.2. Click on View. <u>Result:</u> A drop down menu displays.3. Click on Show/Hide Sections. <u>Result:</u> The Format Sections menu displays.4. Highlight the desired field to Hide and or Suppress.5. Click on the box adjacent to Hide(Drill-Down OK). <u>Result:</u> A check mark appears in the box.6. Click on OK. <u>Result:</u> The Field you selected is hidden. <p><i>Note: Repeat this procedure to restore the Report to its original view.</i></p>