

***COMPANY***

***AERMS***

# **AcquIS**

## **Acquisition Information System**

# **Users Manual**

**June 2009**

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## Overview

The American Company Risk Management Services (AERMS) Acquisition Information System (AcquiIS) is database driven client-server software providing up-to-date information for external acquisitions performance reporting. The system contains key card application characteristics, demographic information, and corresponding Cardmember performance information, enabling analysis of acquisition campaigns from a marketing, credit, and financial perspective.

The AcquiIS system provides detailed statistical reports of all Cardmember accounts acquired less than 24 months ago. All reporting is based on the first 12 months of the acquired Cardmember's tenure. The system is comprised of client software, a server executable, an administrator's tool, and a database.

The software's easy-to-use menu driven system generates a multitude of user-defined reports. Marketing reports present valuable information concerning responding population demographics and approval rates. Risk Management reports provide assessed credit worthiness of approved applications with required detail to monitor new account model performance. Financial reporting of spending, attrition, and collection amount may be used to determine profitability by acquisition campaign.

## Getting Started

The AcquiIS software is installed by an AcquiIS Administrator at the Participant's location. When the installation is complete, a desktop icon to launch the AcquiIS software will be available on the desktop of the personal computer on which it was loaded.

The Participant's AcquiIS Administrator will assign a user name and password to each user requiring access to the AcquiIS software. Please contact your AcquiIS Administrator for changes or updates to all AcquiIS user names and passwords.



## Signing Onto AcquIS

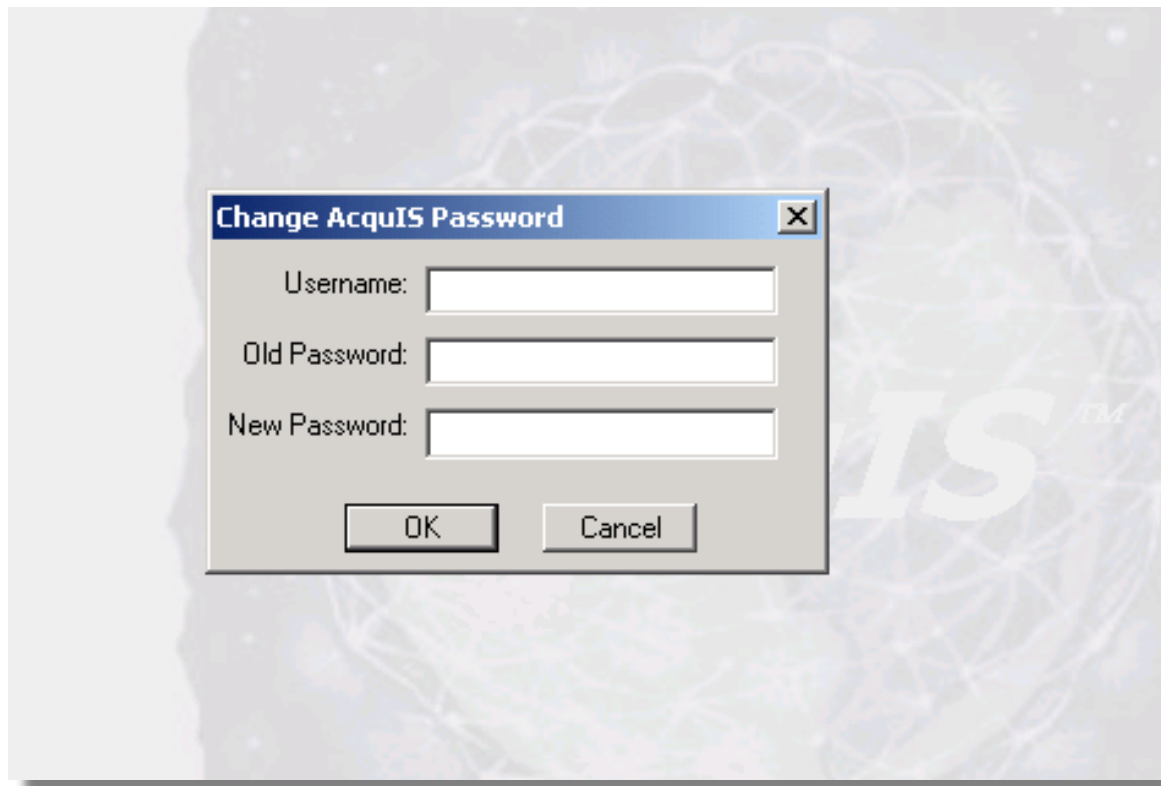
Select the AcquIS icon on the desktop to launch the software, then enter your username and password. Contact your AcquIS Administrator with any problems connecting to AcquIS on your server.

## Connecting Different Users

If it is necessary to change users, choose the "Connect as User" option under the "File" pull-down menu to log off AcquIS. This allows another user to logon to AcquIS without closing the software.

## Changing Passwords

The "Change Password" option under the "File" pull-down menu allows any AcquIS user to change their password. The "Change AcquIS Password" dialogue box that appears allows users to type in the user name, old password, and new password, as illustrated in Figure 1.



**Figure 1: Change AcquIS Password Dialog Box**



## Help Topics

Access the “Help Topics” option from the “Help” pull-down menu. The contents of the help menu include:

- **Menus:** File Menu, Edit Menu, View Menu, Window Menu, Help Menu
- **Reports:** Decision Reports, Distribution Reports, Performance Reports
- **Customized Reports:** Customizing Ranges and Creating Where Statements
- **Copying and Exporting:** Copying, pasting, and exporting reports

All drop down menus, buttons, entry points, and field names in both the windows and the reports are explained in the Help Topics window, as illustrated in Figure 2.

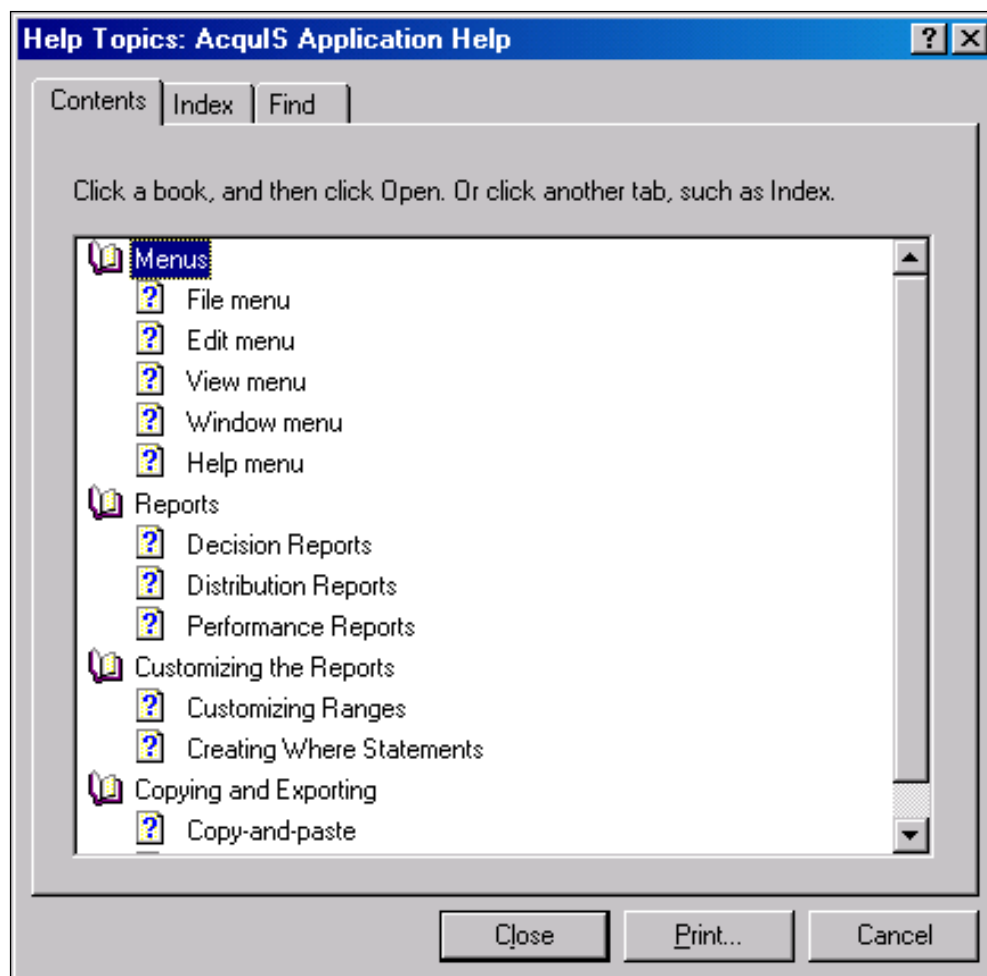


Figure 2: Help Desk Window





## **Closing AcquIS**

To exit AcquIS, select the "X" box in the upper right hand corner, or select "Close" under the "File" pull-down menu. Any Range Sets, Where statements, or Key Reports created during the AcquIS session will be saved for use in future AcquIS sessions.



## Creating Reports

Many different reports are created to understand the performance of new accounts. Each report presents information in a different format, depending on the row, table, and performance variables selected.

- **Decision Reports** include the total number and proportion (percentage) of new account applications that are approved, declined, or canceled each month by a selected row variable
- **Distribution Reports** include the quantity and percentage of applications by a selected row variable for the selected months of acquisition.
- **Performance Reports** include the quantity and percentage of approved, canceled, and declined, as well as total applications, along with selected row variables, table variables, and performance measures (Refer to [Appendix 1: Performance Measures Available in AcquiIS](#) on page 48).



## Report Elements

Each report available in AcquiS uses specific variables to generate the various types of information required for each report type.

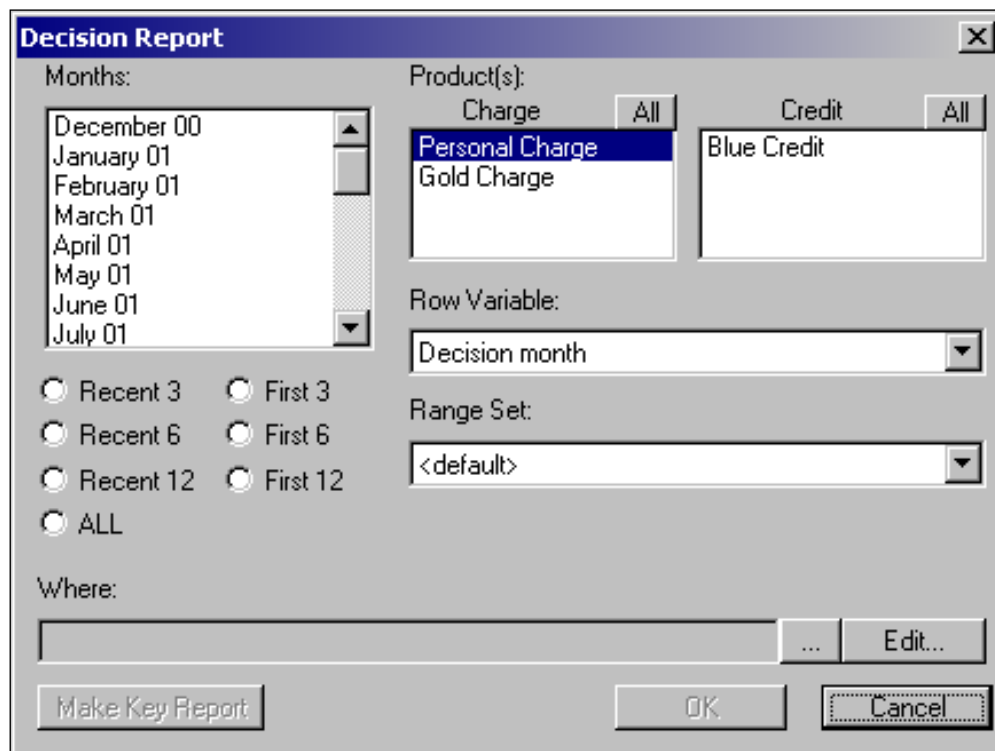
### Acquisition Month

Acquisition Month is used in Decision, Distribution, and Performance Reports. The Decision Report dialog box is illustrated in Figure 3.

To select individual acquisition months, select the appropriate month in the “Months” section of the dialog box. To select any combination of acquisition months, use the following steps:

- Select the month
- Hold down the control key
- Select any number of additional months

There are also several preset groups, including the most recent 3, 6, and 12 calendar months available and the first 3, 6, and 12 months of acquisition available in the database. The preset group “ALL” is also available for Decision and Performance reports. Regardless of portfolio tenure, AcquiS only retains the 24 most recent months of acquisition data.



**Figure 3: Decision Report Dialog Box**



## Products

The Products element is used in Decision, Distribution, and Performance Reports. The reports are created by product type. A product is selected by choosing the product type under the "Product(s)" section of the dialog box. You can choose one, multiple, or all products within each category.

In the example illustrated in Figure 4, there are two product categories (Credit and Charge), and three product types (Personal Charge, Gold Charge, and Blue Credit). The list of products in these categories may vary based on the products offered by each Participant. Choose multiple products by selecting the "All" button, or by selecting a product, holding down the control key, and selecting any additional products.

**Note:** Multiple products can *only* be selected within the same product category (e.g., Charge or Credit products).

**Decision Report**

Months:  
December 00  
January 01  
February 01  
March 01  
April 01  
May 01  
June 01  
July 01

Product(s):  
Charge: All  
Credit: All

Personal Charge  
Gold Charge  
Blue Credit

Row Variable:  
Decision date

Range Set:  
<default>

☐ Recent 3 ☐ First 3  
☐ Recent 6 ☐ First 6  
☐ Recent 12 ☐ First 12  
☐ ALL

Where:  
...

Make Key Report OK Cancel

Figure 4: Decision Report Product Categories

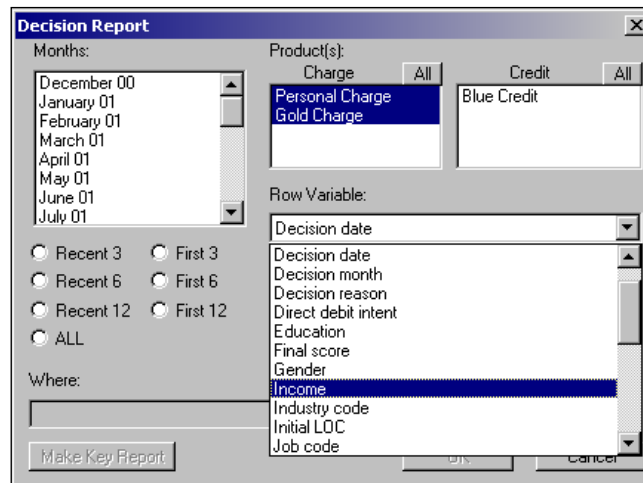


## Row Variable

The Row Variable element is used in Decision, Distribution, and Performance Reports. A row variable is selected from any number of application variables available in AcquiIS. Common examples of row variables available in all AcquiIS reports include gender, income, age, education, final score, or marital status. Variables are customized to a Participant's new account application fields, as specified by the Participant.

A row variable is selected to view the report in greater detail, as illustrated in Figure 5. For example, selecting income in the "Row Variable" section of the dialog box displays approvals, declines, and cancels by income level.

**Note:** To achieve the best results when selecting "Decision Date" as a Row Variable for Decision and Distribution reports, select only one month at a time.



**Figure 5: Decision Report Row Variable Example**

## Range Sets

Range Sets are used in Decision, Distribution, and Performance Reports. The report dialog box also contains a "Range Set" drop down menu, which allows the user to select the appropriate range set for the report. Each type of report has a pre-defined set of ranges known as default ranges (e.g., the variable "tenure" has ranges of  $x=0$ ,  $0 < x < 6$ ,  $6 < x < 12$ , etc.).

AcquiIS allows the user to either select a default range, or to create new ranges when defining the variables to be used in a report. For additional details regarding creating and customizing range sets, refer to the Customizing Report Range Sets section on page 22 of this manual.

**Note:** If "x = any" appears in the range set drop down menu, it indicates that the range set was not divided into separate ranges. For example, "Zip/Postal Code = any" indicates that the Zip/Postal Codes were not divided into specific ranges.



**Note:** Throughout AcquiIS, the amount of time or tenure is illustrated as “mm/yy” (mm = number of months, yy = number of years). For example, the range set “06/00 < x ≤ 00/01” represents a range greater than 6 months and less than or equal to one year.

### **Performance Measure**

Performance Measures are only used in Performance Reports. The Performance Measure drop-down menu includes variables that are different than the Table Variable or the Row Variable selections (e.g., age, gender, etc.). Refer to “[Appendix 1: Performance Measures Available in AcquiIS](#)” on page 48 for a list of definitions of the various Performance Measures available.

### **Table Variable**

Table Variables are only used in Performance Reports. The items listed under the Table Variable drop-down menu include the same variables listed under the Row Variable drop-down menu. The option to select a “Single Table” variable is also available under the Table Variable drop-down menu. Selecting the “Single Table” variable will generate a report that provides a summary of totals, rather than a comparison of possible variables.



## Reports and Graphs

After all required fields in the report's dialog box are chosen, select the "OK" button to generate the report.

The results of the decision report query are illustrated in Figure 6. The window includes the report tables for each decision month containing Approve/Cancel/Decline numbers and the percentages for each level of income. Scrolling down reveals the tables for the other months, as well as a table for the total of all months.

**Note:** When a "0" appears as a table result, it means that the value shown is zero. When a "-" appears as a table result, it means that there is no value or data for the table result.

Dec 2000							
Income	Approved n	Approved %	Canceled n	Canceled %	Declined n	Declined %	Total
0 <= x < 20000	63	37.28	0	0.00	106	62.72	169
20000 <= x < 28000	101	63.13	1	0.63	58	36.25	160
28000 <= x < 36000	72	72.73	3	3.03	24	24.24	99
36000 <= x < 50000	65	78.31	3	3.61	15	18.07	83
50000 <= x < 66000	53	86.89	1	1.64	7	11.48	61
66000 <= x < 86000	31	91.18	1	2.94	2	5.88	34
86000 <= x < 100000	7	87.50	0	0.00	1	12.50	8
100000 <= x < 150000	21	84.00	2	8.00	2	8.00	25
150000 <= x < 300000	6	100.00	0	0.00	0	0.00	6
300000 <= x	1	50.00	1	50.00	0	0.00	2
<b>Total</b>	<b>420</b>	<b>64.91</b>	<b>12</b>	<b>1.85</b>	<b>215</b>	<b>33.23</b>	<b>647</b>

Jan 2001							
Income	Approved n	Approved %	Canceled n	Canceled %	Declined n	Declined %	Total
0 <= x < 20000	32	29.63	5	4.63	71	65.74	108
20000 <= x < 28000	61	67.78	8	8.89	21	23.33	90
28000 <= x < 36000	59	80.82	1	1.37	13	17.81	73
36000 <= x < 50000	49	90.74	2	3.70	3	5.56	54
50000 <= x < 66000	51	91.07	2	3.57	3	5.36	56
66000 <= x < 86000	12	85.71	0	0.00	2	14.29	14
86000 <= x < 100000	4	80.00	1	20.00	0	0.00	5
100000 <= x < 150000	21	95.45	0	0.00	1	4.55	22
150000 <= x < 300000	8	88.89	0	0.00	1	11.11	9
300000 <= x	4	100.00	0	0.00	0	0.00	4
<b>Total</b>	<b>301</b>	<b>69.20</b>	<b>19</b>	<b>4.37</b>	<b>115</b>	<b>26.44</b>	<b>435</b>

Figure 6: Decision Report Example





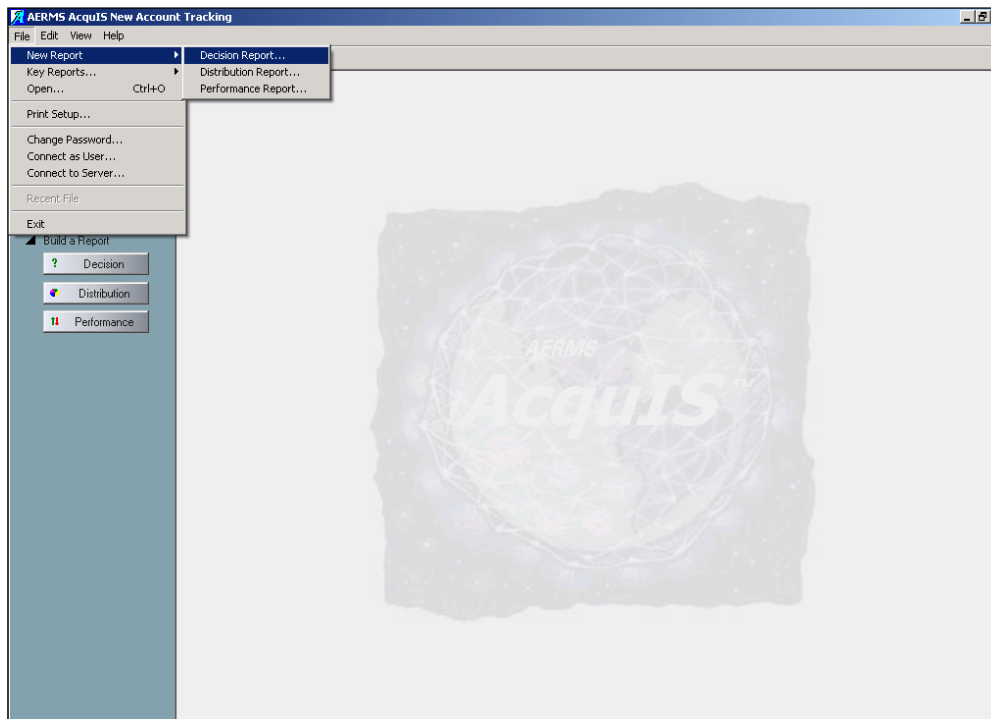
## Decision Reports

Decision Reports show the total number and proportion of card applications that are approved, declined, or canceled each month by a selected row variable. Columns consist of the following fixed variables: number approved, percent approved, number canceled, percent canceled, number declined, percent declined, and total.

Refer to the Acquisition Month, Products, Row Variable, and Range Sets sections of this manual for additional details about each report selection.

A Decision Report can be created using one of the following three methods, as illustrated in Figure 7:

- Select the  Decision button in the navigation panel on the left side of the screen
- Select the "File" pull-down menu, choose the "New Report" option, then select "Decision Report"
- Select the  icon on the shortcut bar directly below the "File" menu





**Figure 7: Creating a Decision Report**



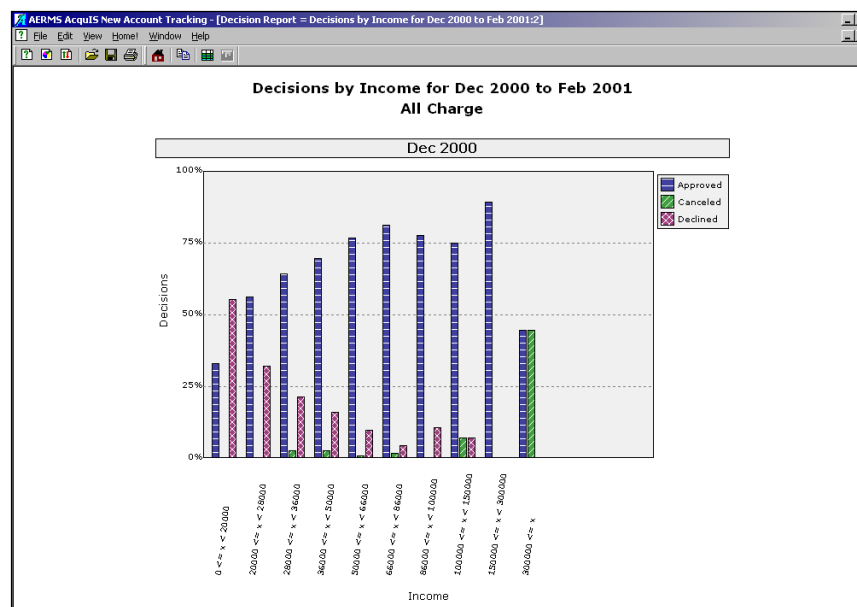


In the example shown in Figure 8, the decision report is based on all Charge products for the first three months of acquisition, according to income level.

**Figure 8: Decision Report Row Variable and Months Example**

Selecting the  icon in the navigation bar at the top of the screen opens a new window to display the table information in a graph format. Selecting the  icon takes the user back to the window that displays the table format.

To close the graph and report windows, select the "X" box in the upper right hand corner, or select "Close" under the "File" pull-down menu.





**Figure 9: Decision Graph Example**



## Distribution Reports

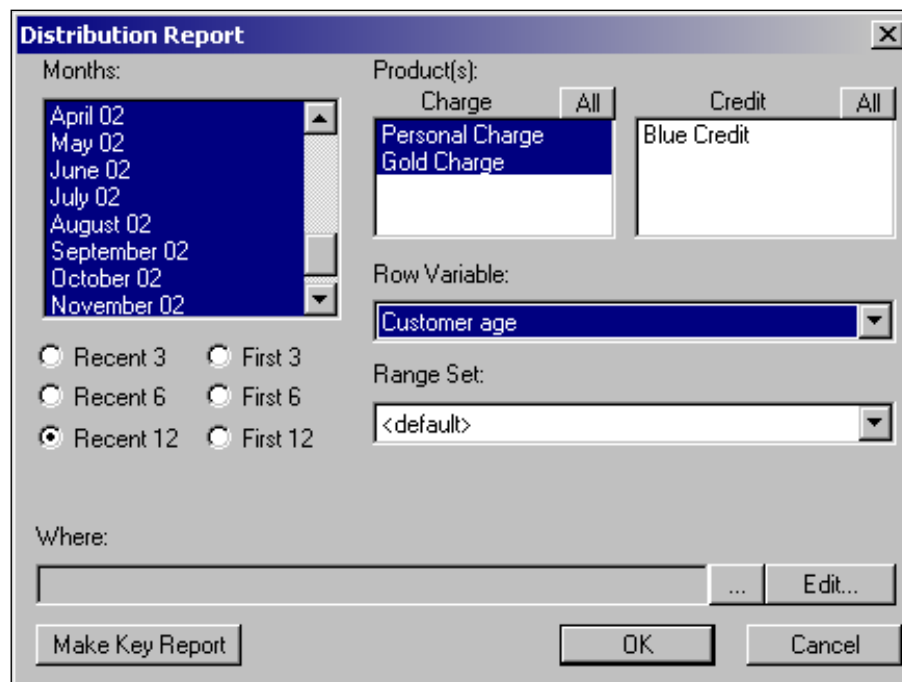
Distribution Reports include the quantity and percentage of card applications by a selected row variable for the selected months of acquisition. The column variables are fixed at the acquisition months chosen. The row variables consist of any application variables available in AcquIS.

A Distribution Report is created using one of the following three methods:

- Select the  button in the navigation panel on the left side of the screen
- Select the "File" pull-down menu, select the "New Report" option, then select "Distribution Report"
- Click the  icon on the shortcut bar directly below the View menu

The Distribution Report dialog box is shown below. Refer to the Acquisition Month, Products, Row Variable, and Range Sets sections of this manual for additional details about each report selection.

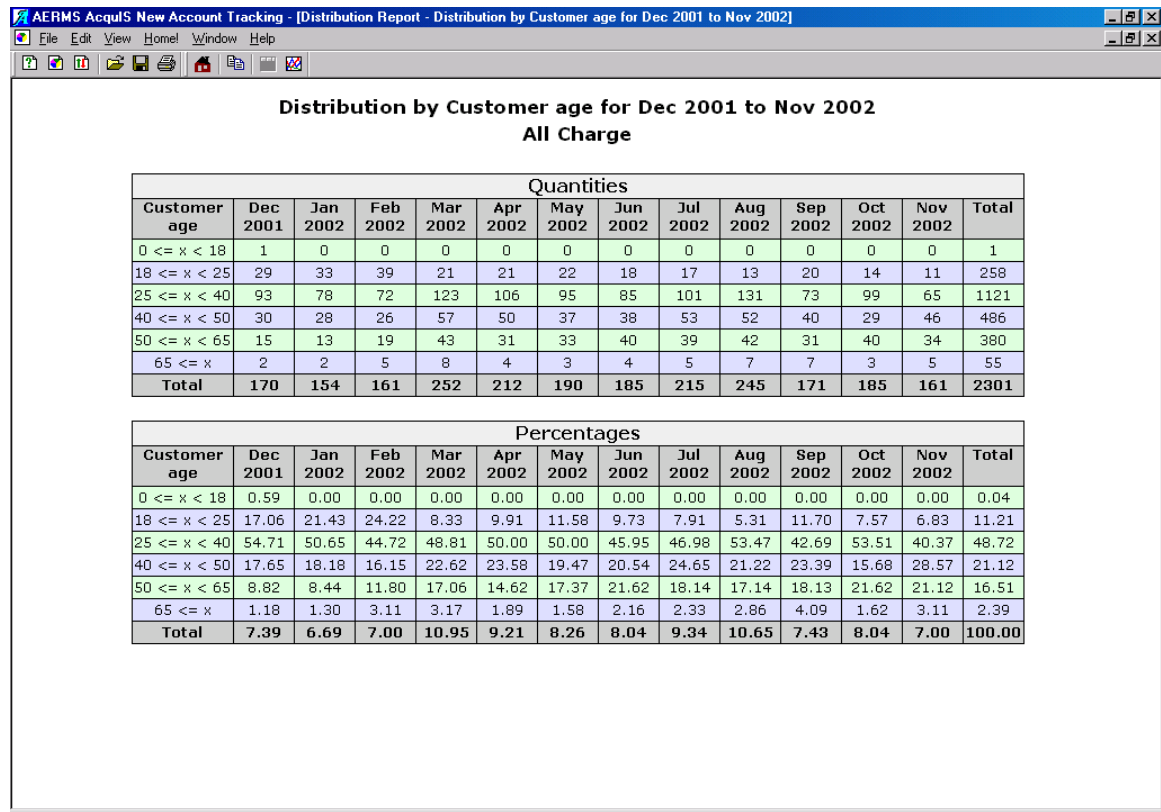
The example query illustrated in Figure 10, requests a distribution report for the most recent twelve months of acquisition for Personal Charge and Gold Charge cards, with a row variable of Customer Age.




**Figure 10: Distribution Report Dialog Box**




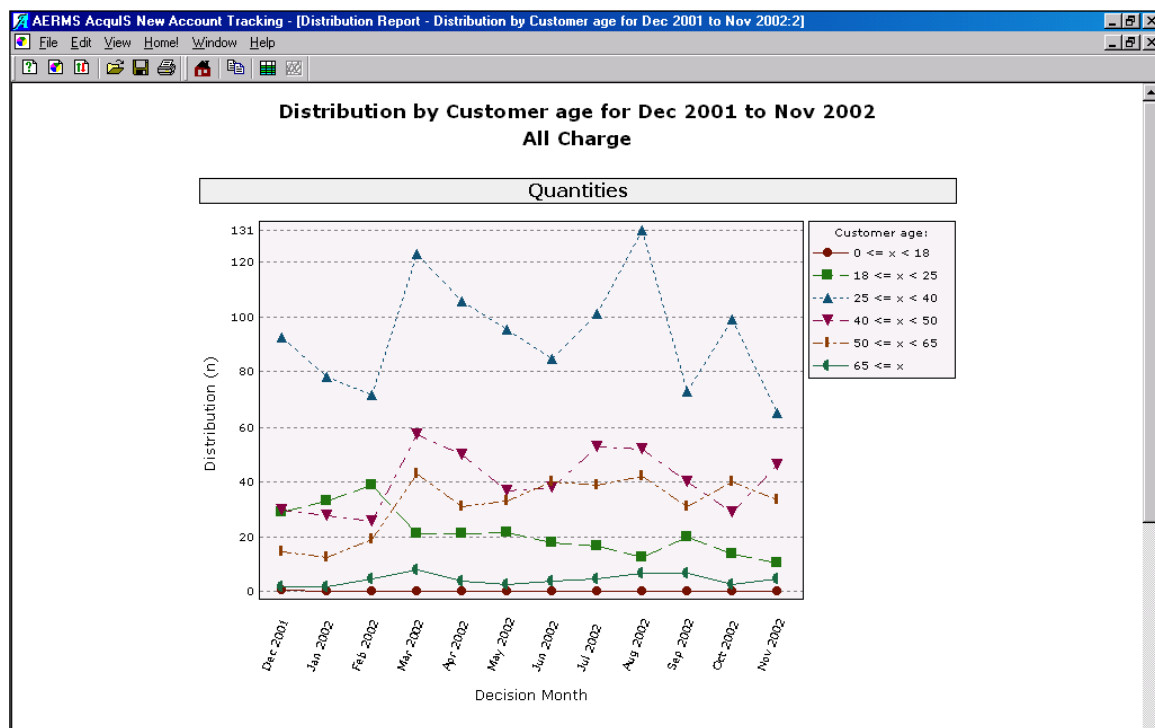
The output for this example query is shown in Figure 11. The Distribution Report provides the number of applications for each month based on a row variable (e.g., Customer Age), while the Decision Report provides the actual decision for each application (Approve, Decline, Cancel).



**Figure 11: Distribution Report Example**

Selecting the  icon in the navigation bar at the top of the screen opens a new window to display the table information in a graph format. The first chart displays the quantity of applications for the different levels of Customer Age and the second chart (accessed by scrolling down in the window) displays the percentage of applications for the different levels of Customer Age.

Selecting the  icon takes the user back to the window that displays the table format. Refer to the Reports and Graphs section on page 10 of this manual for additional details regarding reports and graphs.





**Figure 12: Distribution Graph Example**



## Performance Reports

The Performance Reports are the most versatile and complex of the AcquiIS reports. They include the quantity and percentage of approved, canceled, and total applications, along with selected performance measures. The column variable for Performance Reports is fixed at 1 (one month after acquisition), 2 (two months after acquisition), and so on up to a maximum of 12 (12 months after acquisition). The row and table variables are chosen from any variable available in AcquiIS.

Create a Performance Report using one of the following three methods:

- Select the  button in the navigation panel on the left side of the screen
- Select the "File" pull-down menu, select the "New Report" option, then select "Performance Report"
- Click the  icon on the shortcut bar directly below the Help menu

The Performance Report dialog box is illustrated in Figure 13. The selections of Month(s), Product Type, Row Variable, and Range Set available for the Performance Reports are the same as those available for the Decision and Distribution reports. Refer to the Acquisition Month, Products, Row Variable, and Range Sets sections of this manual for additional details about each report selection.

The additional selections of Performance Measure and Table Variable are also required for the Performance Report.



The query illustrated in Figure 13 requests the months of acquisition for all Charge products. The Performance Measure is "Cancel Derog," the Table Variable is "Single Table," and the Row Variable is "Final Score."

**Note:** Credit products contain six additional Performance Measures not available for Charge products, due to the additional revolve features of credit cards. These Credit product Performance Measures include: Average Balance Transfer, Percent Users with Balance Transfer, Average Lin of Credit, Average Utilization, Revolve Rate, and Percent Users with Revolve Balance.

The screenshot shows the 'Performance Report' dialog box with the following settings:

- Months:** A list box containing months from October 01 to October 02, with 'October 01' selected.
- Product(s):** Two list boxes. The 'Charge' list box contains 'Personal Charge' and 'Gold Charge'. The 'Credit' list box contains 'Blue Credit'. Both list boxes have 'All' buttons next to them.
- Performance Measure:** A dropdown menu set to 'Cancel Derog'.
- Table Variable:** A dropdown menu set to 'Single Table'.
- Row Variable:** A dropdown menu set to 'Final score'.
- Range Set:** A dropdown menu set to '<default>'.
- Where:** An empty text field with an 'Edit...' button to its right.
- Buttons:** 'Recent 3', 'Recent 6', 'Recent 12' (selected), 'ALL', 'First 3', 'First 6', 'First 12', 'Make Key Report', 'OK', and 'Cancel'.

**Figure 13: Performance Report Dialog Box**





The output for this query is shown in Figure 14. The Performance Measure is placed in columns under Total Number of Applications, Cancel Percentage, Approval Percentage, and Approval Number. The column headers 1-12 represent the month's tenure for Cardmember performance and the value in the cells below is the percentage of Cancel Derog accounts cumulative across each final score range.

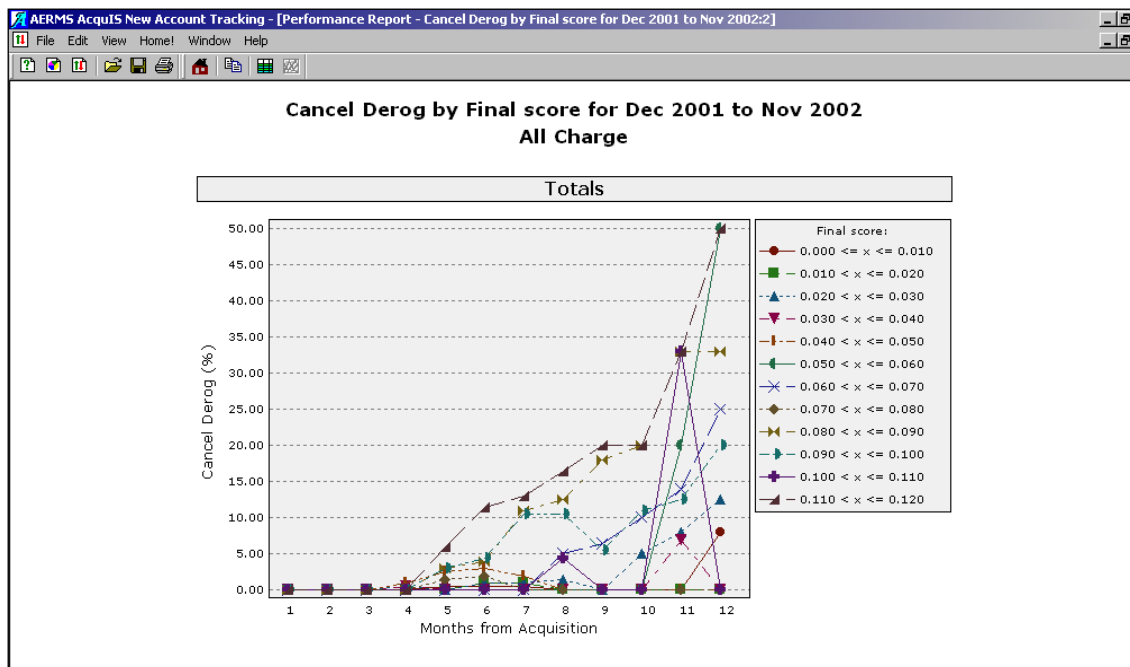
Cancel Derog by Final score for Dec 2001 to Nov 2002																
All Charge																
Totals																
Final score	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
0.000 <= x <= 0.010	344	1.45	97.38	335	0.00	0.00	0.00	0.38	0.86	0.51	0.58	0.00	0.00	0.00	0.00	8.33
0.010 < x <= 0.020	186	1.08	95.16	177	0.00	0.00	0.00	0.00	0.00	1.04	1.16	0.00	0.00	0.00	0.00	0.00
0.020 < x <= 0.030	174	1.72	94.25	164	0.00	0.00	0.00	0.85	0.00	1.19	1.43	1.89	0.00	5.26	8.33	12.50
0.030 < x <= 0.040	159	2.52	95.60	152	0.00	0.00	0.00	0.86	0.00	0.00	0.00	0.00	0.00	0.00	7.14	0.00
0.040 < x <= 0.050	137	2.92	93.43	128	0.00	0.00	0.00	1.09	2.60	3.45	2.17	0.00	0.00	0.00	0.00	0.00
0.050 < x <= 0.060	104	0.00	96.15	100	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00	50.00
0.060 < x <= 0.070	94	6.38	89.36	84	0.00	0.00	0.00	0.00	0.00	0.00	0.00	5.26	6.90	10.00	14.29	25.00
0.070 < x <= 0.080	81	3.70	88.89	72	0.00	0.00	0.00	0.00	1.85	2.08	0.00	0.00	0.00	0.00	0.00	0.00
0.080 < x <= 0.090	56	10.71	87.50	49	0.00	0.00	0.00	0.00	3.33	4.00	11.11	12.50	18.18	20.00	33.33	33.33
0.090 < x <= 0.100	59	0.00	88.14	52	0.00	0.00	0.00	0.00	3.33	4.55	10.53	10.53	5.88	11.11	12.50	20.00
0.100 < x <= 0.110	45	2.22	88.89	40	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.55	0.00	0.00	33.33	0.00
0.110 < x <= 0.120	53	7.55	79.25	42	0.00	0.00	0.00	0.00	6.25	11.54	13.04	16.67	20.00	20.00	33.33	50.00
0.120 < x <= 1.000	774	2.33	22.22	172	0.00	0.00	0.75	1.60	4.00	5.88	6.06	6.38	10.00	10.71	22.22	26.32
value missing	35	20.00	45.71	16	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	2301	2.74	68.80	1583	0.00	0.00	0.08	0.50	1.28	1.88	2.11	2.44	2.84	3.80	9.15	14.44

**Figure 14: Performance Report Example**



Selecting the  icon in the navigation bar at the top of the screen opens a new window to display the table information in a graph format. Each line on the graph illustrated in Figure 15 represents the cumulative Cancel Derog percentage by final score range.

Selecting the  icon takes the user back to the window that displays the table format. Refer to Reports and Graphs section on page 10 of this manual for additional details regarding reports and graphs.



**Figure 15: Performance Graph Example**

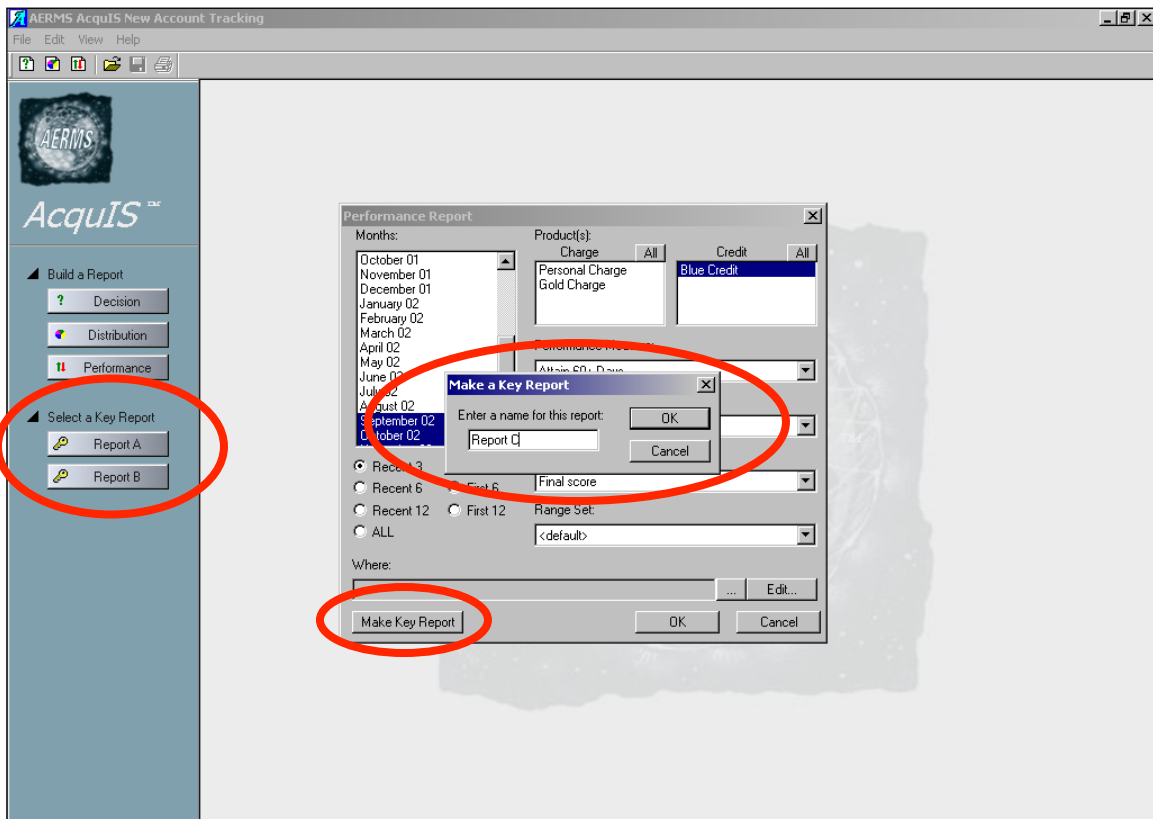


## Creating Key Reports

Reports that are accessed frequently can be saved for future use by creating key reports. AcquiS allows the user to create up to five Key Reports.

After choosing the parameters of the report, select the "Make Key Report" button in the bottom left side of the dialog box. This will bring up the "Make Key Report" dialog box. Enter a name for the key report of no more than 15 characters in length, then select the "OK" button to create a new key report. A shortcut button for the report will appear on the navigation panel on the left side of the screen, as illustrated in Figure 16.

Key Reports can be created for any report, however the Key Report buttons do not indicate the type of report (Decision, Distribution, or Performance). Referencing Key Reports with descriptive names helps differentiate the report's characteristics.



**Figure 16: AcquiS Window and the Make a Key Report Dialog Box**



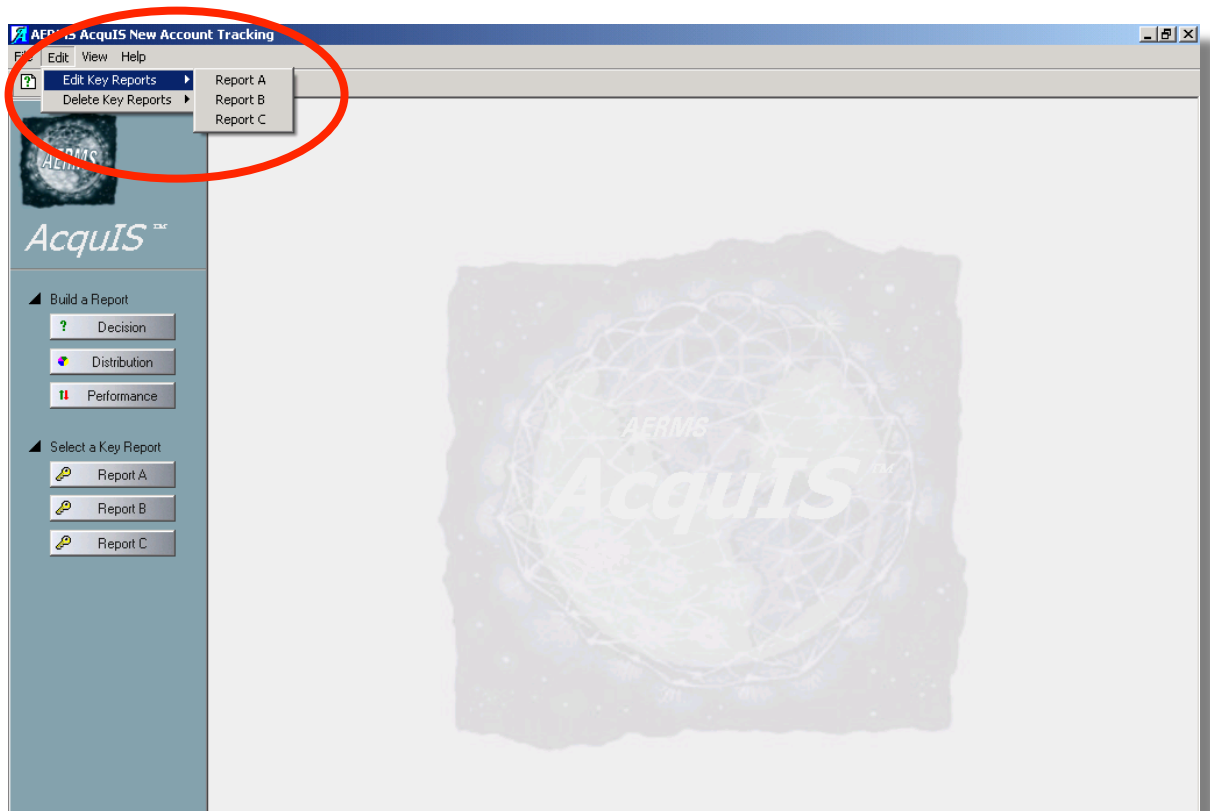
## Editing and Deleting Key Reports

Once created, Key Reports may be edited or deleted. Simply select the "Edit" pull-down menu and choose either "Edit Key Reports" or "Delete Key Reports." If multiple Key Reports exist, a list of the available Key Reports appears under the "Edit" pull-down menu, as illustrated in Figure 17. If no Key Reports are created, no reports will appear in this pull-down menu.

Once a report is selected under the "Edit Key Reports" option, the report's dialog box appears to allow the user to change the report's parameters. Select the "OK" button to save the updated parameters of the key report.

Select the "Delete Key Reports" option under the "Edit" pull-down menu to delete the Key Report.

**Note:** Before attempting to edit a Key Report, be sure to close any reports that are open in AcquiS.



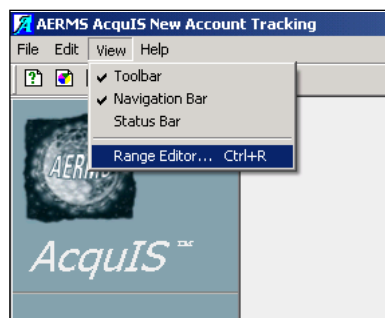
**Figure 17: AcquiS Window and Editing Key Reports**

## Customizing Reports

A user can customize all types of AcquiS reports using Range Sets and Where Statements.

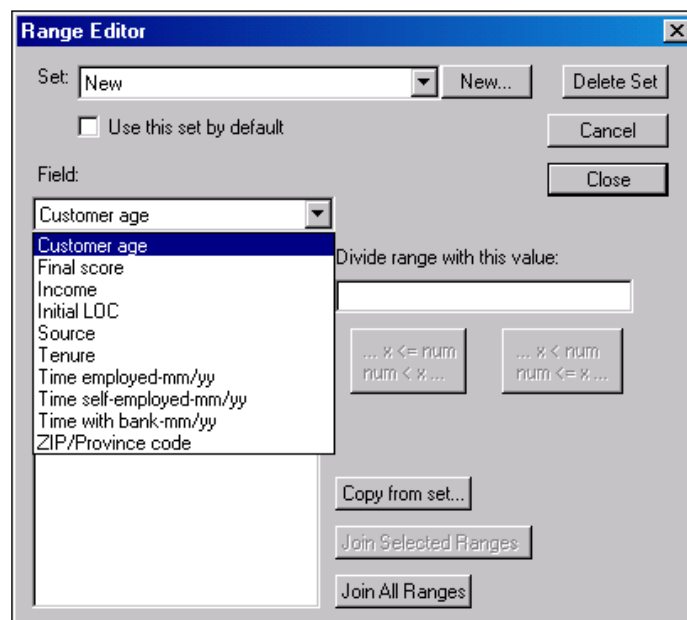
### Customizing Report Range Sets

For each report there is an area in the query box called "Range Set" that can be used to modify the presentation of row or table variables. To modify a range set, select the "View" pull-down menu and select the "Range Editor" option, as illustrated in Figure 18.



**Figure 18: View Menu For Modifying a Range Set**

The Range Editor dialog box will appear displaying a list of the fields for which ranges can be edited or created, as illustrated in Figure 19.

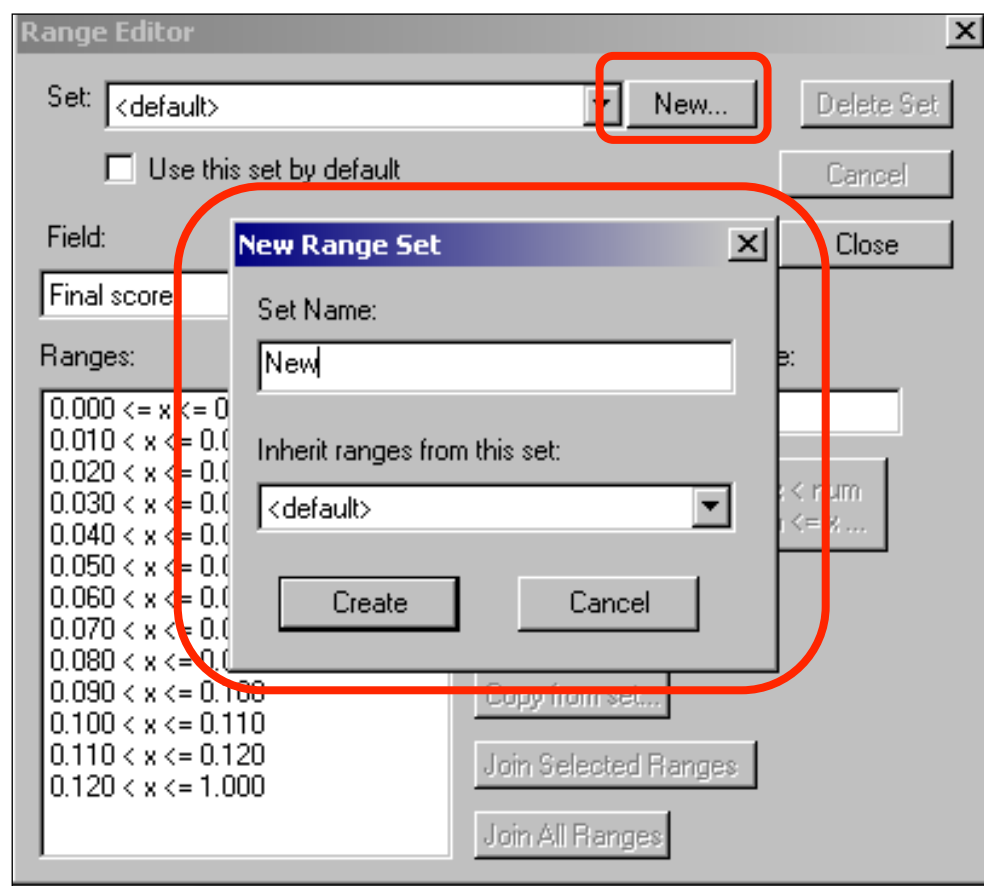


**Figure 19: Range Editor Dialog Box**

To create a new range, first select the "New..." button in the Range Editor dialog box. Next, place the cursor in the "Set Name" box and type in a name to reference the new Range Set, as illustrated in Figure 20.

The user must also choose an existing range set (either the default range set or one created previously) from the "Inherit ranges from this set:" drop-down menu in the New Range Set window. Using an already established range set provides a useful starting point for creating new ranges.

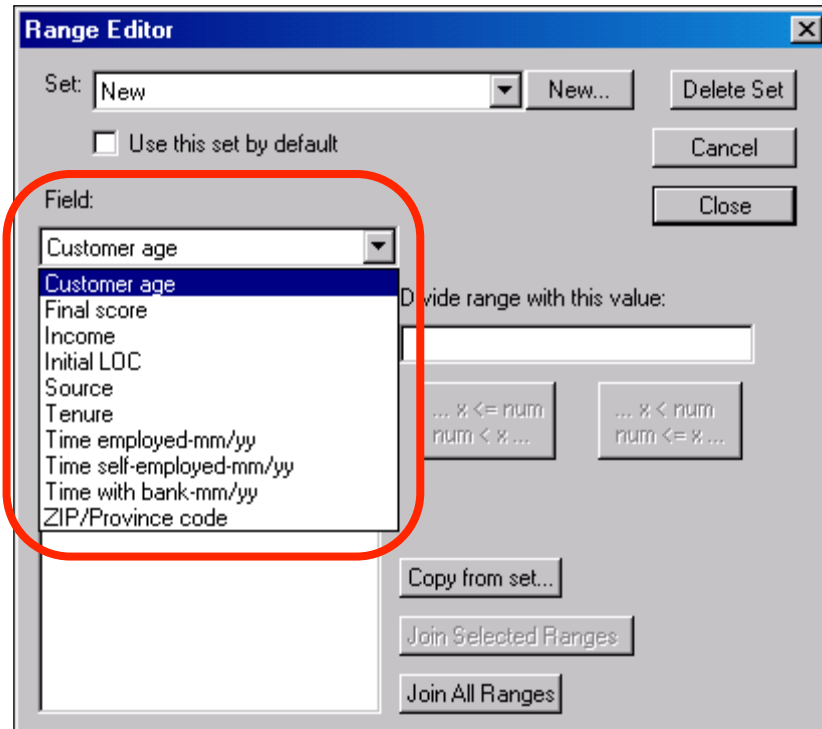
Select the "Create" button to begin defining the new range set. The set name created will appear in the "Set" drop-down menu of the Range Editor dialog box.



**Figure 20: New Range Set Dialog Box**

To apply the new range, select a field from the "Field" drop-down menu. The current ranges for that field will appear in the "Ranges" section of the Range Editor dialog box, as illustrated in Figure 21.

Multiple fields (e.g., customer age, tenure, final score, etc.) can be updated within each range set.



**Figure 21: Ranges Section of the Range Editor Dialog Box**



Once the field is selected and the Range Editor dialog box displays the ranges currently associated with that field, the user can complete one of the actions described in the following sections.

### **Overwrite Existing Ranges**

To overwrite the ranges associated with the field using a different range set, use the following steps:

- 1) Select the "Copy from set..." button
- 2) Select the range set for the field you want to copy
- 3) Select the "OK" button and the new field ranges will replace the previous ranges

### **Join Selected Ranges**

To join a set of several already established ranges, use the following steps:

- 1) Select the ranges to join from the "Ranges" section in the Range Editor dialog box. To select multiple ranges, hold down the shift key and select each desired range; each set must include at least two consecutive ranges
- 2) Select the "Join Selected Ranges" button to join all selected ranges into one range

The steps outlined above may be repeated to join additional ranges.

### **Join All Ranges**

To join all ranges displayed, select the "Join All Ranges" button.

### **Create a New Range**

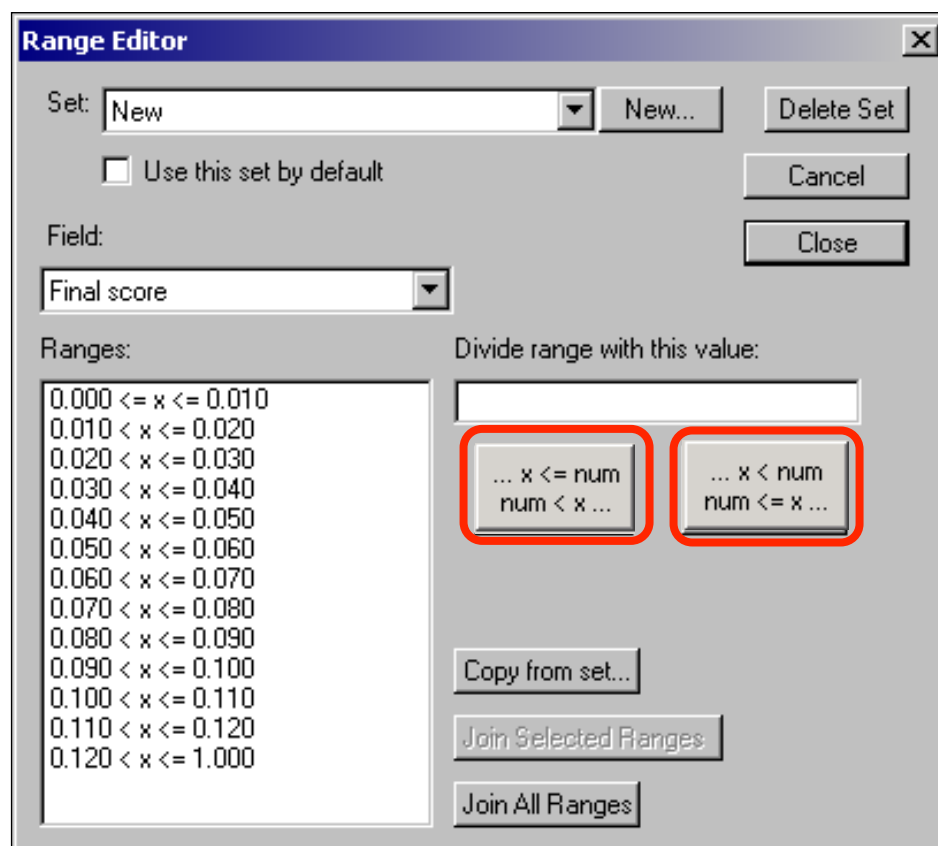
In the "Divide range with this value" section of the Range Editor dialog box, type in the value to be used to set a new range. Once the value is entered, select either the "...x<=num, num< x..." button, or the "...x< num, num<= x..." button, illustrated in Figure 22 to create a new range.

The "...x<=num, num< x..." button divides the range into two by making the right side of the two ranges to be  $x \leq$  your value, and the left side of the second of the two ranges to be your value  $< x$ .

... x <= num  
num < x ...

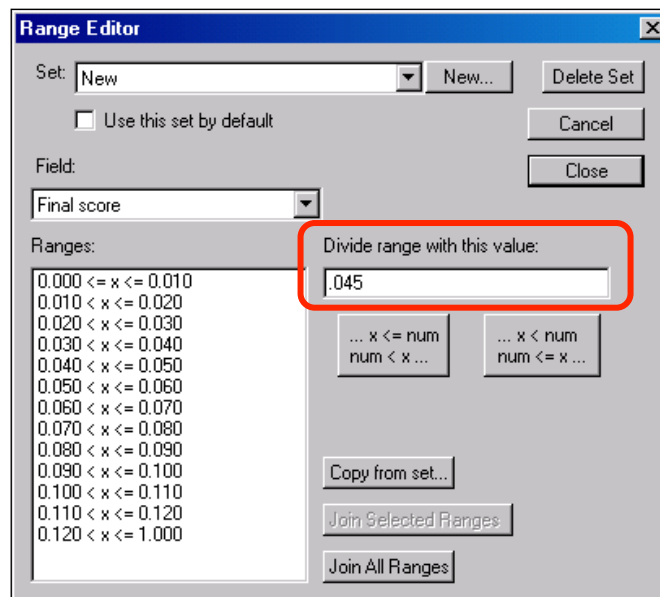
The "...x< num, num<= x..." button divides the range into two by making the right side of the first of the two ranges to be  $x <$  your value, and the left side of the second of the two ranges to be your value  $\leq x$ .

... x < num  
num <= x ...



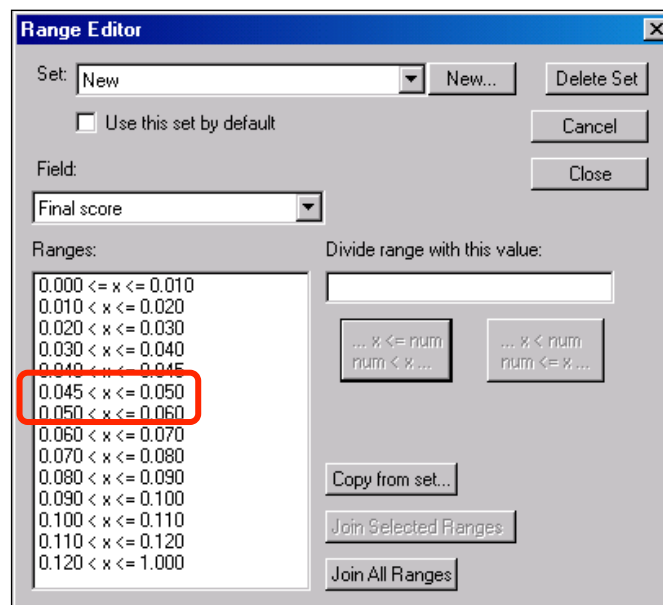
**Figure 22: Options for Creating New Ranges**

In the example illustrated in Figure 23, the value “.045” is added to the final score range. Type .045 in the “Divide range with this value” field, and select the “...x <= num, num < x” button.



**Figure 23: Creating a new value in a Final Score Range**

The value .045 appears between .040 and .050, as illustrated in Figure 24.



**Figure 24: Final Score Range Example**

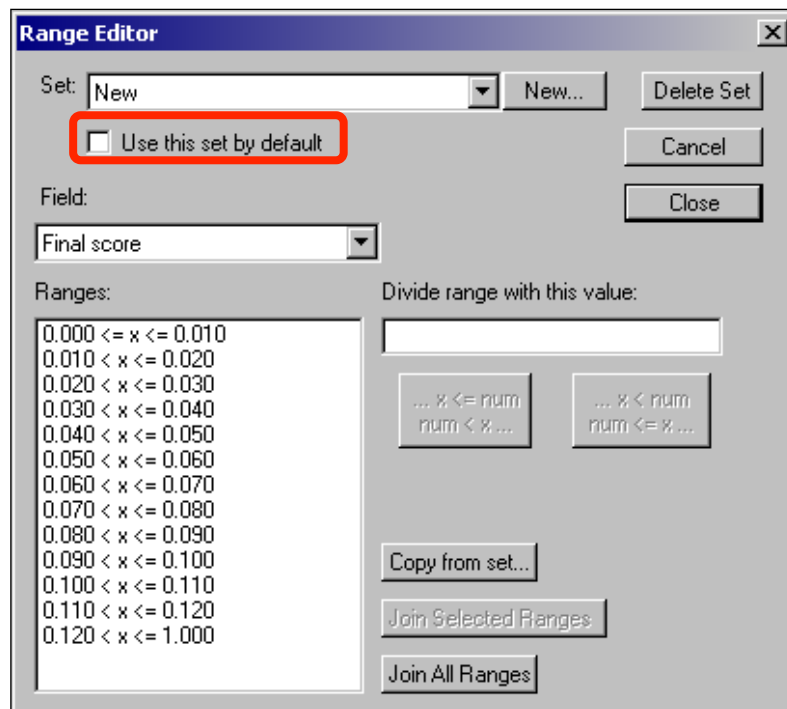


## Saving and Closing New Range Sets

To save the new ranges, close the Range Editor dialog box and all changes will be automatically saved.

To automatically apply the new range set to future reports, select the “Use this set by default” checkbox in the Range Editor dialog box before saving the set.

**Note:** There is no limit to the number of ranges that can be added to a field range set, however the readability of reports and graphs is affected by the number of ranges used in the report. Applying too many range sets will produce a graph that is difficult to read. For this reason, a limit of 12 sets of ranges per field is recommended for graphs. If more than 24 ranges are selected for a table, the additional ranges will move to the next page of the table.

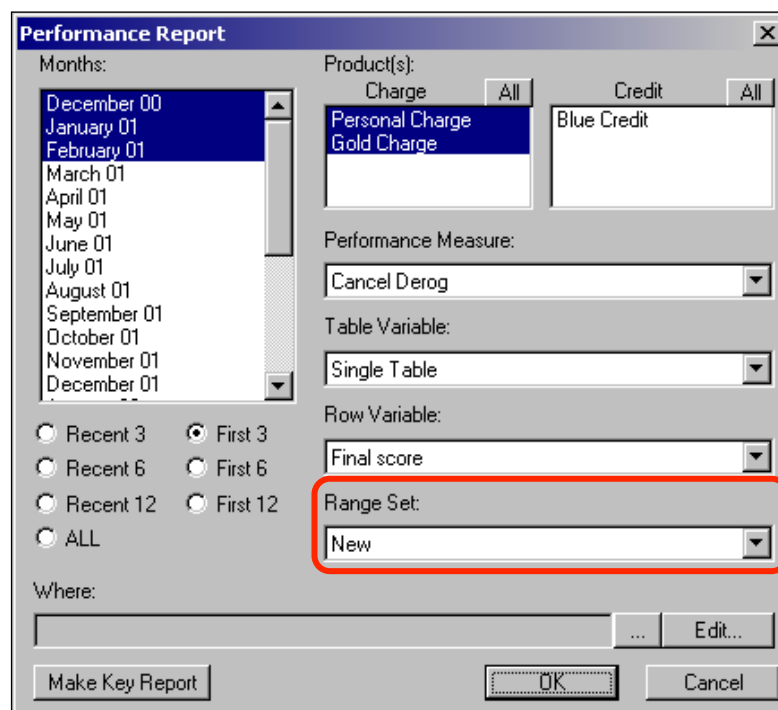


**Figure 25: Setting Default Range Sets in the Range Editor Dialog Box**

## Using Range Sets in Reports

The new range set can be used in any of the AcquiS reports available. A different range set can be selected for every report by choosing the appropriate range from the "Range Set" drop-down menu on the dialog box of the specific report.

The following pages provide an example of range sets as they are used in a Performance Report. In the Performance Report query box, shown in Figure 26, the new range ("New") is selected from the "Range Set" pull-down menu.





The image shows a screenshot of the "Performance Report" dialog box. The "Months" list on the left includes December 00 through December 01, with February 01 selected. The "Product(s)" section has two columns: "Charge" (with "Personal Charge" and "Gold Charge" listed) and "Credit" (with "Blue Credit" listed). The "Performance Measure" is set to "Cancel Derog". The "Table Variable" is "Single Table". The "Row Variable" is "Final score". The "Range Set" dropdown menu is highlighted with a red rectangle and shows "New" selected. At the bottom, there are buttons for "Make Key Report", "OK", and "Cancel".

**Figure 26: Selecting a new range in the Performance Report Query Box**



In this example, a Performance Report is created for the most recent three months for the Personal Charge and Gold Charge products. The performance measure is "Cancel Derog," and the row variable is "Final Score," using the new range set labeled "New" for the "Final Score" field. Notice the new range of .045 is included in this report.

Selecting the  icon in the navigation bar at the top of the screen opens a new window to display the table information in a graph format.

Selecting the  icon takes the user back to the window that displays the table format. Refer to the Reports and Graphs section on page 9 of this manual for additional details regarding reports and graphs.

AERMS AcquiS New Account Tracking - [Performance Report - Cancel Derog by Final score for Dec 2000 to Feb 2001]

File Edit View Home! Window Help

Cancel Derog by Final score for Dec 2000 to Feb 2001  
All Charge

Final score	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
0.000 <= x <= 0.010	81	1.23	98.77	80	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.25	1.25	1.25
0.010 < x <= 0.020	102	0.00	99.02	101	0.00	0.00	0.00	0.00	0.99	0.99	1.98	1.98	1.98	1.98	2.97	2.97
0.020 < x <= 0.030	80	1.25	96.25	77	0.00	0.00	0.00	0.00	1.30	1.30	1.30	1.30	1.30	1.30	1.30	2.60
0.030 < x <= 0.040	94	1.06	97.87	92	0.00	0.00	0.00	1.09	2.17	3.26	4.35	4.35	5.43	5.43	6.52	6.52
0.040 < x <= 0.045	0	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
0.045 < x <= 0.050	79	2.53	96.20	76	0.00	0.00	0.00	0.00	1.32	1.32	1.32	1.32	1.32	1.32	1.32	1.32
0.050 < x <= 0.060	63	1.59	96.83	61	0.00	0.00	0.00	0.00	0.00	1.64	3.28	3.28	4.92	4.92	4.92	4.92
0.060 < x <= 0.070	43	0.00	100.00	43	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0.070 < x <= 0.080	53	1.89	92.45	49	0.00	0.00	0.00	4.08	4.08	4.08	8.16	8.16	8.16	8.16	12.24	14.29
0.080 < x <= 0.090	44	4.55	93.18	41	0.00	0.00	0.00	2.44	4.88	7.32	9.76	9.76	9.76	12.20	14.63	14.63
0.090 < x <= 0.100	41	2.44	92.68	38	0.00	2.63	2.63	7.89	10.53	10.53	10.53	10.53	10.53	10.53	13.16	13.16
0.100 < x <= 0.110	44	6.82	88.64	39	0.00	0.00	0.00	0.00	0.00	2.56	5.13	7.69	7.69	7.69	7.69	7.69
0.110 < x <= 0.120	40	10.00	82.50	33	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.06	6.06	6.06
0.120 < x <= 1.000	612	2.12	36.60	224	0.00	0.00	0.45	3.13	4.91	7.59	9.38	13.39	15.63	16.07	18.30	20.98
value missing	187	7.49	26.20	49	0.00	0.00	0.00	2.04	2.04	2.04	2.04	2.04	2.04	4.08	4.08	6.12
TOTAL	1563	2.82	64.17	1003	0.00	0.10	0.20	1.50	2.49	3.49	4.59	5.58	6.28	6.88	7.98	8.87

Figure 27: Performance Report with New Range Example



## **Editing and Deleting Range Sets**

Range sets can be edited or deleted using the "Range Editor" option under the "View" pull-down menu. Select the range set to be deleted from the "Set" pull-down menu. Select "Delete Set" to delete the range.

Select the range set to be edited from the "Set" pull-down menu. To edit the range set, select the range to be edited, edit the range by making the desired changes, and close the Range Editor dialog box to save the edited range.

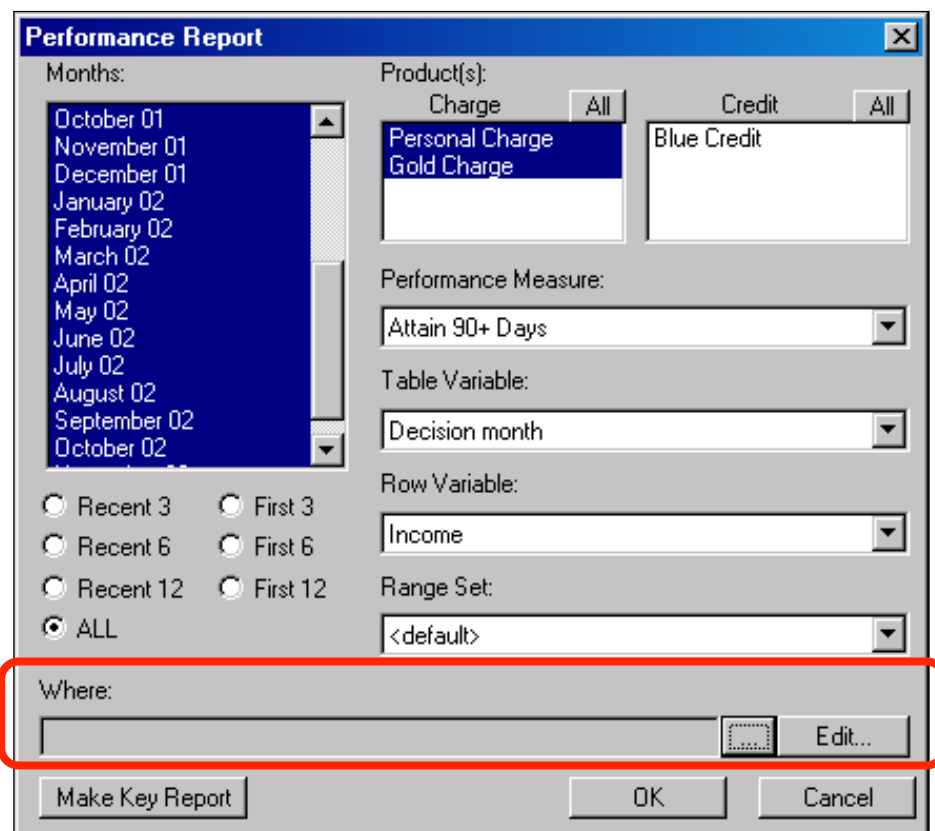


## Creating Where Statements

A Where statement segments a dataset in a report by filtering out groups of Cardmembers with selected characteristics. This allows the reports to be narrowed in scope to meet individual needs. Where statements created in one report can be used in any other report.

The following example shows a Where statement to understand how Cardmembers with an income greater than \$20,000 perform. In this example, a Where statement is created to select only those Cardmembers with an income greater than \$20,000.

To subset the data by income of over \$20,000, select a Performance Measure of "Attain 90+ Days," a Table Variable of "Decision Month," and a Row variable of "Income," for all months and all Charge products in the Performance Report dialog box. Then select the "Edit..." button next to the "Where" box in the Performance Report dialog box, illustrated in Figure 28.



**Figure 28: Creating Where Statements in the Performance Report Dialog Box**

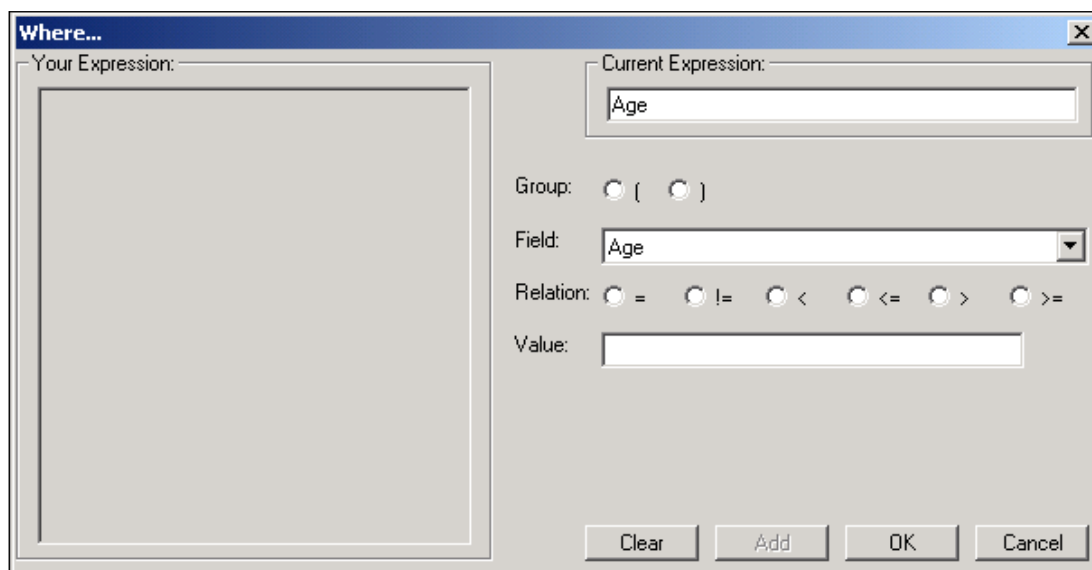


## Using the Where Dialog Box

Once the "Edit..." button is selected, the "Where" dialog box becomes available to subset the data. The six components of the "Where" dialog box are shown below:

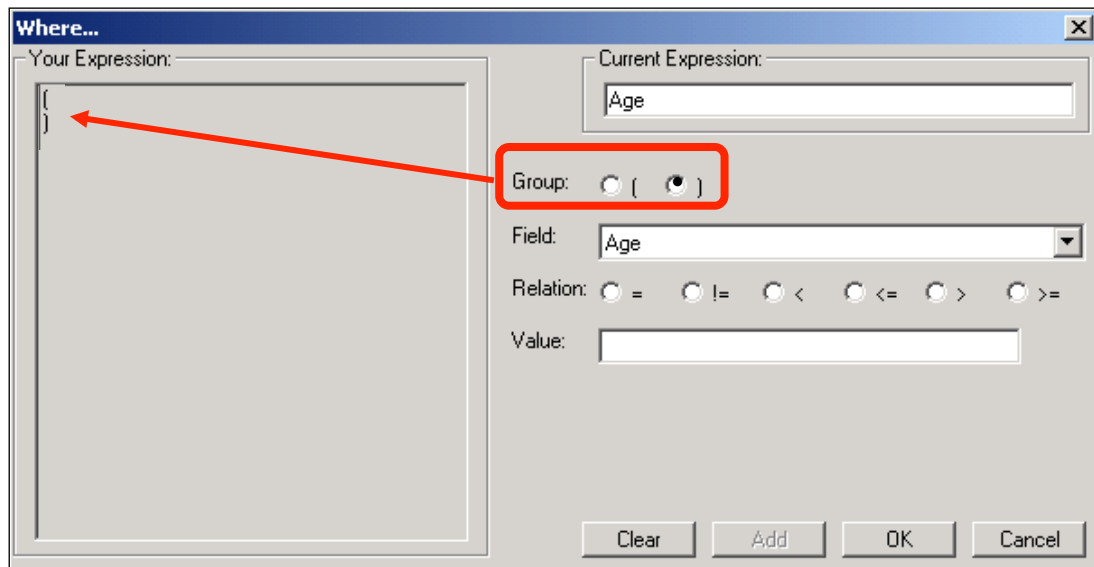
- Your Expression box
- Current Expression box
- Group buttons
- Field pull-down menu
- Relation operator buttons
- Value box

A seventh component, the "Logic Operator" buttons, appear when there are one or more statements in the where expression that include an "AND" and an "OR" operator.



**Figure 29: Where Statement Dialog Box**

The "Group" buttons are used for adding parentheses to the "Where statement". Selecting the left parenthesis ( "(" ) adds a set of parenthesis to the "Your Expression" box. If multiple sets of parenthesis are needed to create a complex Where statement, select the left parenthesis button for the desired number of parenthesis. The right parenthesis completes the expression by moving the cursor outside of the parenthesis.



**Figure 30: Your Expression Dialog Box for Where Statements**



The "Relation" box allows the user to apply an operator that determines how the variable should be subset. The operators available for continuous variables include:

- equals (=)
- not equal (!=)
- less than (<)
- less than or equal (<=)
- greater than (>)
- greater than or equal (>=)

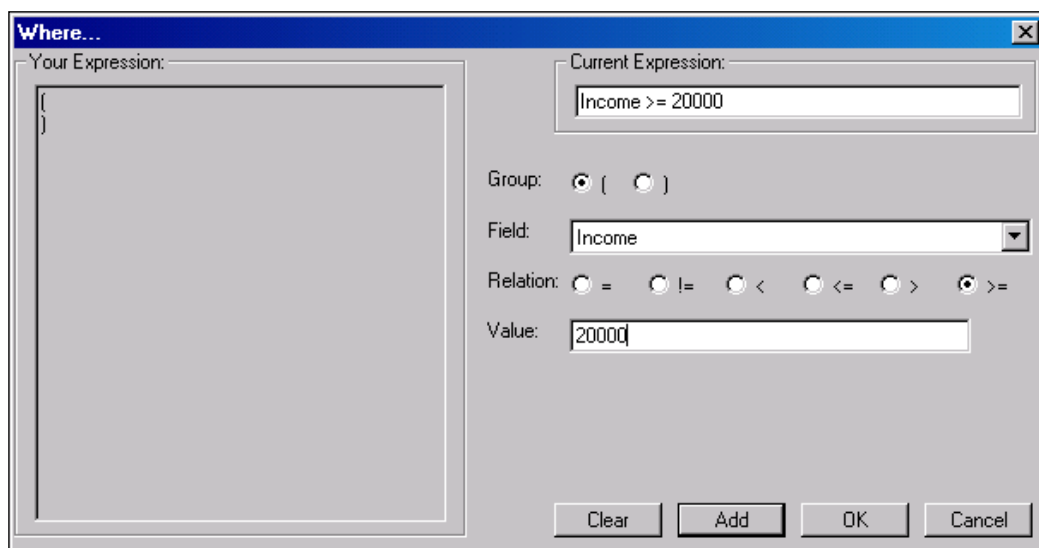
The operators available for categorical variables include:

- equals (=)
- not equal (!=)
- in a set (IN)
- not in a set (!IN)

The in and not in operators are used to subset categorical data by more than one categorical value (See [Appendix 2: Additional Examples of Where Statements](#) on page 50).

To subset the data by income of over \$20,000, select the left parentheses button in the "Group" section to add parenthesis, select the "Income" variable from the "Field" pull-down menu, and select the ">=" button next to "Relation" option. Type in the desired amount to subset in the "Value" box, in this case 20000. Notice that the "Current Expression" box now contains Income >= 20000. Click the "Add" button.

**Note:** Values entered can only contain numeric characters (no punctuation or spaces).

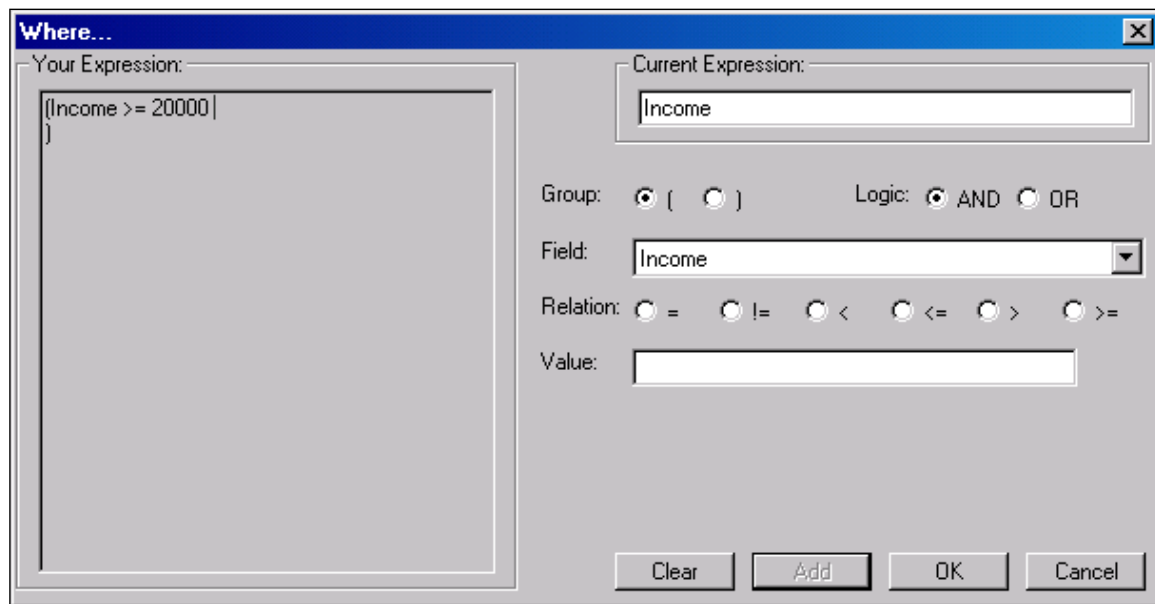


**Figure 31: Relation Function of Where Statement Dialog Box**





Once the "Add" button is selected, the "Your Expression" box contains `Income >=20000`, enclosed in the parenthesis initially selected, as illustrated in Figure 32. Select the "OK" button to return to the "Performance Report" dialog box.



**Figure 32: Example of Your Expression Function in Where Dialog Box**



As shown in Figure 33, the "Where" box now contains the expression "Income > = 20000." Select the "OK" button to create the new Performance Report.

The image shows a "Performance Report" dialog box. It has several sections: "Months:" with a list of months from October 01 to October 02; "Product(s):" with "Charge" and "Credit" sub-sections, each containing a list of products (e.g., Personal Charge, Gold Charge, Blue Credit); "Performance Measure:" with a dropdown menu set to "Attain 90+ Days"; "Table Variable:" with a dropdown menu set to "Decision month"; "Row Variable:" with a dropdown menu set to "Income"; and "Range Set:" with a dropdown menu set to "<default>". Below these sections are radio buttons for "Recent 3", "Recent 6", "Recent 12", "First 3", "First 6", "First 12", and "ALL" (which is selected). At the bottom, there is a "Where:" field containing the expression "(Income >= 20000 )", which is highlighted with a red rectangle. To the right of the "Where:" field is an "Edit..." button. At the very bottom are buttons for "Make Key Report", "OK", and "Cancel".

**Figure 33: Example of Performance Report Dialog Box Using Where Statement**



The output of the "Attain 90+ Days by Income" query illustrated in Figure 34 is now limited to only those applications that had an income of \$20,000 or more for all Charge products. This is an example of a Performance Report using a Where statement.

**Attain 90+ Days by Income for Dec 2000 to Nov 2002**  
**All Charge, where Income >= 20000**

Decision month: Dec 2000																
Income	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
0 <= x < 20000	0	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
20000 <= x < 28000	160	0.63	63.13	101	0.00	0.00	0.00	2.97	0.99	2.97	3.96	3.96	1.98	2.97	3.96	3.96
28000 <= x < 36000	99	3.03	72.73	72	0.00	0.00	0.00	2.78	1.39	2.78	0.00	4.17	0.00	0.00	1.39	0.00
36000 <= x < 50000	83	3.61	78.31	65	0.00	0.00	0.00	0.00	1.54	0.00	1.54	1.54	3.08	0.00	0.00	0.00
50000 <= x < 66000	61	1.64	86.89	53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.89	3.77	0.00	0.00
66000 <= x < 86000	34	2.94	91.18	31	0.00	0.00	3.23	6.45	6.45	6.45	6.45	6.45	6.45	6.45	6.45	9.68
86000 <= x < 100000	8	0.00	87.50	7	0.00	0.00	0.00	14.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100000 <= x < 150000	25	8.00	84.00	21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
150000 <= x < 300000	6	0.00	100.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
300000 <= x	2	50.00	50.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL	478	2.51	74.69	357	0.00	0.00	0.28	2.24	1.40	1.96	1.96	2.80	1.96	1.96	1.96	1.96

Decision month: Jan 2001																
Income	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
0 <= x < 20000	0	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
20000 <= x < 28000	90	8.89	67.78	61	0.00	0.00	0.00	1.64	1.64	1.64	0.00	0.00	1.64	0.00	1.64	1.64
28000 <= x < 36000	73	1.37	80.82	59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.69
36000 <= x < 50000	54	3.70	90.74	49	0.00	0.00	0.00	0.00	2.04	0.00	2.04	0.00	0.00	0.00	0.00	0.00
50000 <= x < 66000	56	3.57	91.07	51	0.00	0.00	1.96	1.96	1.96	1.96	1.96	1.96	1.96	1.96	1.96	1.96
66000 <= x < 86000	14	0.00	85.71	12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
86000 <= x < 100000	5	20.00	80.00	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100000 <= x < 150000	22	0.00	95.45	21	0.00	0.00	4.76	9.52	4.76	4.76	4.76	4.76	4.76	4.76	4.76	4.76
150000 <= x < 300000	9	0.00	88.89	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
300000 <= x	4	0.00	100.00	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**Figure 34: Example of Performance Report Using a Where Statement**



As a means of comparison, this is an example of a Performance Report illustrating the output of the "Attain 90+ Days by Income" query on all applications for all Charge products by income without using a Where statement.

**Attain 90+ Days by Income for Dec 2000 to Nov 2002**  
**All Charge**

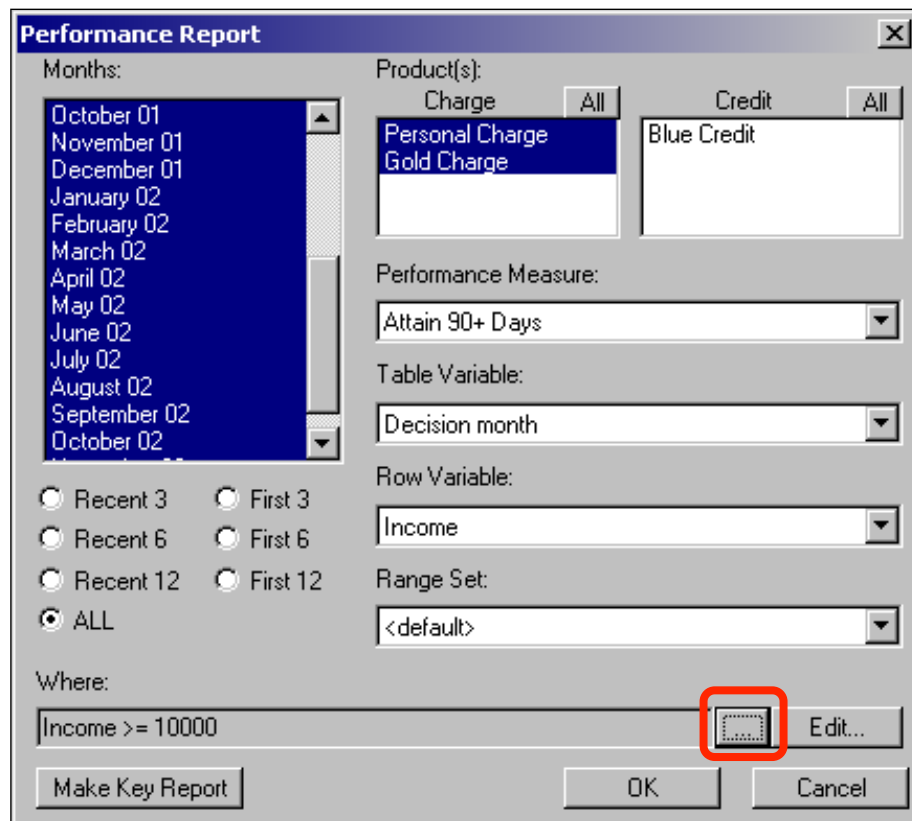
Decision month: Dec 2000																
Income	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
Value missing	169	0.00	37.28	63	0.00	0.00	0.00	3.17	4.76	3.17	3.17	1.59	1.59	1.59	3.17	6.35
0 <= x < 20000	160	0.63	63.13	101	0.00	0.00	0.00	2.97	0.99	2.97	3.96	3.96	1.98	2.97	3.96	3.96
20000 <= x < 28000	99	3.03	72.73	72	0.00	0.00	0.00	2.78	1.39	2.78	0.00	4.17	0.00	0.00	1.39	0.00
28000 <= x < 36000	83	3.61	78.31	65	0.00	0.00	0.00	0.00	1.54	0.00	1.54	1.54	3.08	0.00	0.00	0.00
36000 <= x < 50000	61	1.64	86.89	53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.89	3.77	0.00	0.00
50000 <= x < 66000	34	2.94	91.18	31	0.00	0.00	0.00	3.23	6.45	6.45	6.45	6.45	6.45	6.45	6.45	9.68
66000 <= x < 86000	8	0.00	87.50	7	0.00	0.00	0.00	14.29	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
86000 <= x < 100000	25	8.00	84.00	21	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
100000 <= x < 150000	6	0.00	100.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
150000 <= x < 300000	2	50.00	50.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
300000 <= x	0	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>647</b>	<b>1.85</b>	<b>64.91</b>	<b>420</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>2.38</b>	<b>1.90</b>	<b>2.14</b>	<b>2.14</b>	<b>2.62</b>	<b>1.90</b>	<b>1.90</b>	<b>2.14</b>	<b>2.62</b>

Decision month: Jan 2001																
Income	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
Value missing	108	4.63	29.63	32	0.00	0.00	0.00	0.00	0.00	0.00	3.13	3.13	0.00	0.00	6.25	0.00
0 <= x < 20000	90	8.89	67.78	61	0.00	0.00	0.00	1.64	1.64	1.64	0.00	0.00	1.64	0.00	1.64	1.64
20000 <= x < 28000	73	1.37	80.82	59	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.69
28000 <= x < 36000	54	3.70	90.74	49	0.00	0.00	0.00	0.00	2.04	0.00	2.04	0.00	0.00	0.00	0.00	0.00
36000 <= x < 50000	56	3.57	91.07	51	0.00	0.00	1.96	1.96	1.96	1.96	1.96	1.96	1.96	1.96	1.96	1.96
50000 <= x < 66000	14	0.00	85.71	12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
66000 <= x < 86000	5	20.00	80.00	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
86000 <= x < 100000	22	0.00	95.45	21	0.00	0.00	4.76	9.52	4.76	4.76	4.76	4.76	4.76	4.76	4.76	4.76
100000 <= x < 150000	9	0.00	88.89	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
150000 <= x < 300000	4	0.00	100.00	4	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
300000 <= x	0	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>435</b>	<b>4.37</b>	<b>69.20</b>	<b>301</b>	<b>0.00</b>	<b>0.00</b>	<b>0.66</b>	<b>1.33</b>	<b>1.33</b>	<b>1.00</b>	<b>1.33</b>	<b>1.00</b>	<b>1.00</b>	<b>0.66</b>	<b>1.66</b>	<b>1.33</b>

**Figure 35: Example of Performance Report Without Using a Where Statement**

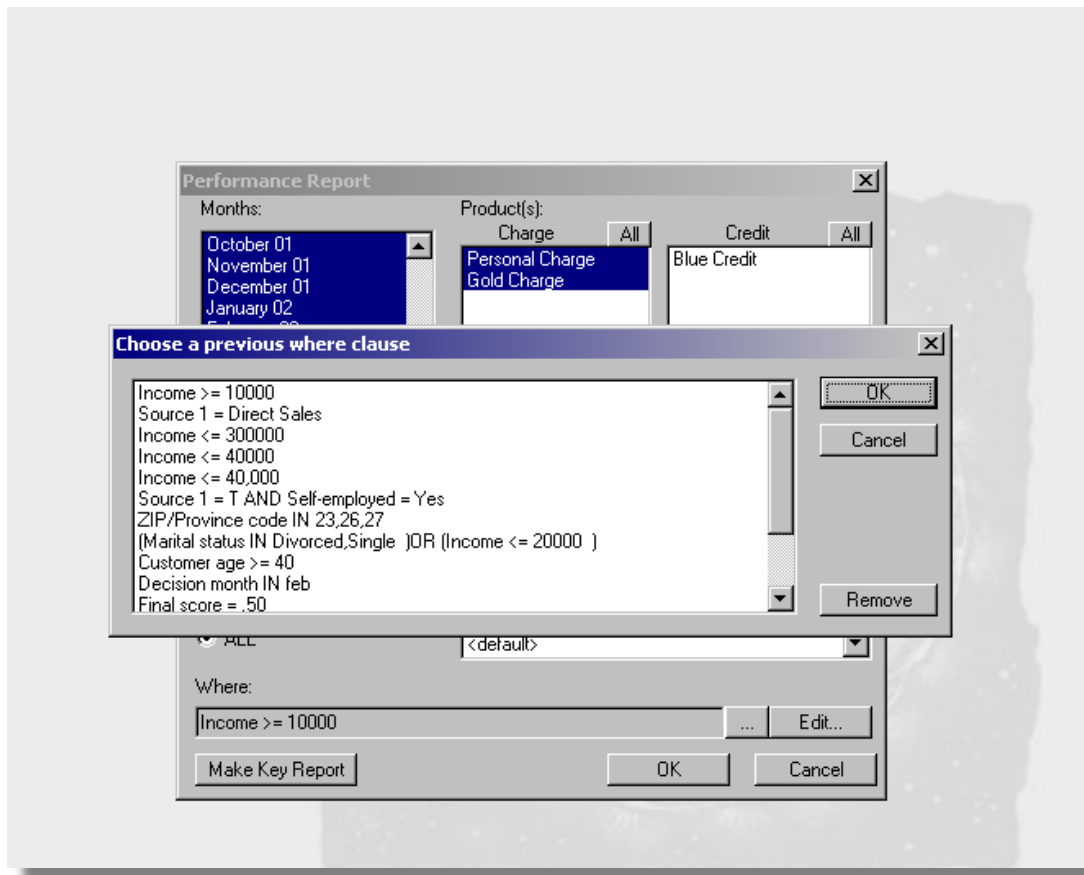


AcquiIS also records the last 30 Where statements created and saves them for future AcquiIS sessions. This History of Where Statements feature can be accessed by selecting the "... " button next to the "Where" box.



**Figure 36: Accessing History of Where Statements in Performance Report Dialog Box**

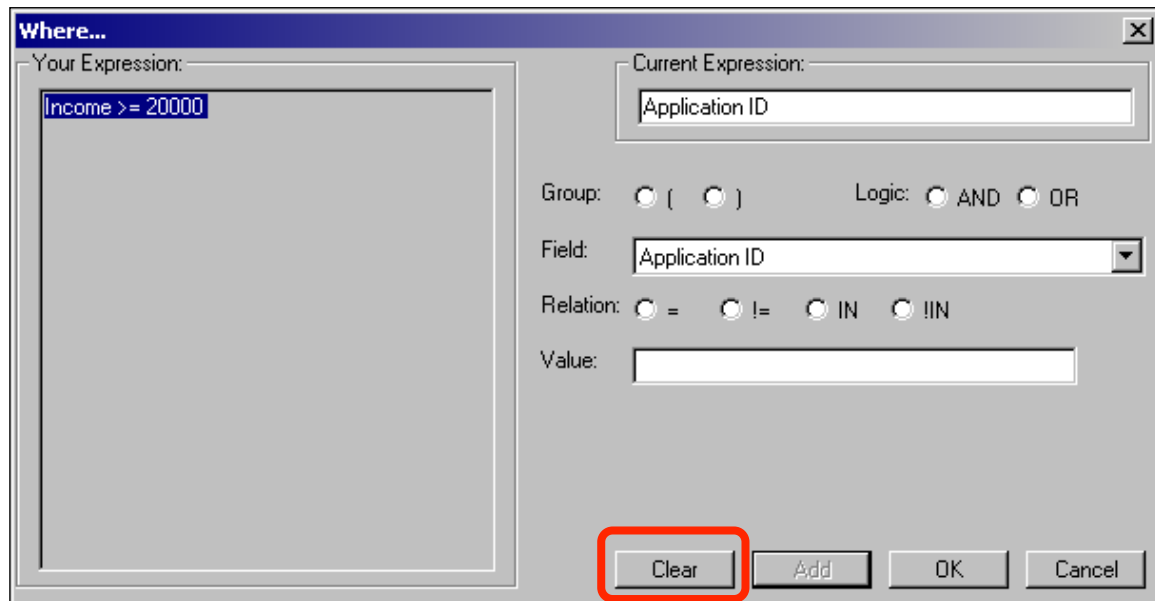
A list of Where statements previously created for any report appears after selecting the "... " button. Choose a previous Where statement by selecting the appropriate statement and then selecting the "OK" button. Where statements can be deleted by selecting the desired statement and choosing the "Remove" button.



**Figure 37: Example of History of Where Statements**



If the report created does not require a Where statement, it can be cleared from the report dialogue box by selecting the "Edit..." button, then selecting the "Clear" and "OK" buttons, as illustrated in Figure 38. The original report dialogue box will appear with no Where statement.



**Figure 38: Clearing a Where Statement From Report Dialog Box**



## Printing, Copying and Exporting Reports

For detailed instructions on printing, copying, and exporting reports into Microsoft® programs, see the Microsoft® Help feature for each product.

### Printing Reports

One of the following two methods is used to print tables or graphs:

- Choose the "Print" option from the "File" pull-down menu
- Select the print icon at the top of the menu bar

Both the table format and chart format are printed by using either method. One table or chart will be printed per page.

### Copying Reports

Table report(s) and graphs can be copied and pasted into Microsoft® Word documents, Microsoft® Excel spreadsheet, or Microsoft® PowerPoint presentations. To copy only the text of a table, select the table to be copied by clicking on that table. Then select the "Copy" option under the "Edit" pull-down menu.

Cancel Derog by Income for Dec 2000 to Feb 2001																
All Charge																
Decision month: Dec 2000																
Income	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
0 <= x < 20000	169	0.00	37.28	63	0.00	0.00	0.00	3.17	6.35	9.52	11.11	11.11	11.11	11.11	11.11	15.87
20000 <= x < 28000	160	0.63	63.13	101	0.00	0.00	0.99	2.97	2.97	3.96	5.94	7.92	7.92	8.91	10.89	12.87
28000 <= x < 36000	99	3.03	72.73	72	0.00	0.00	0.00	2.78	4.17	6.94	6.94	11.11	11.11	11.11	12.50	12.50
36000 <= x < 50000	83	3.61	78.31	65	0.00	0.00	0.00	0.00	1.54	1.54	3.08	4.62	7.69	7.69	7.69	7.69
50000 <= x < 66000	61	1.64	86.89	53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.89	5.66	5.66	5.66
66000 <= x < 86000	34	2.94	91.18	31	0.00	0.00	0.00	3.23	3.23	3.23	3.23	3.23	3.23	3.23	3.23	6.45
86000 <= x < 100000	8	0.00	87.50	7	0.00	0.00	0.00	14.29	14.29	14.29	14.29	14.29	14.29	14.29	14.29	14.29
100000 <= x < 150000	25	8.00	84.00	21	0.00	0.00	0.00	0.00	0.00	0.00	4.76	4.76	4.76	4.76	4.76	4.76
150000 <= x < 300000	6	0.00	100.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
300000 <= x	2	50.00	50.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL</b>	<b>647</b>	<b>1.85</b>	<b>64.91</b>	<b>420</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>2.14</b>	<b>3.10</b>	<b>4.29</b>	<b>5.48</b>	<b>6.90</b>	<b>7.62</b>	<b>8.33</b>	<b>9.05</b>	<b>10.48</b>

Figure 39: Example of Report For Copying





Open a Microsoft® Excel spreadsheet, Microsoft® Word document, or Microsoft® PowerPoint presentation and choose the "Paste" option from the "Edit" pull-down menu.

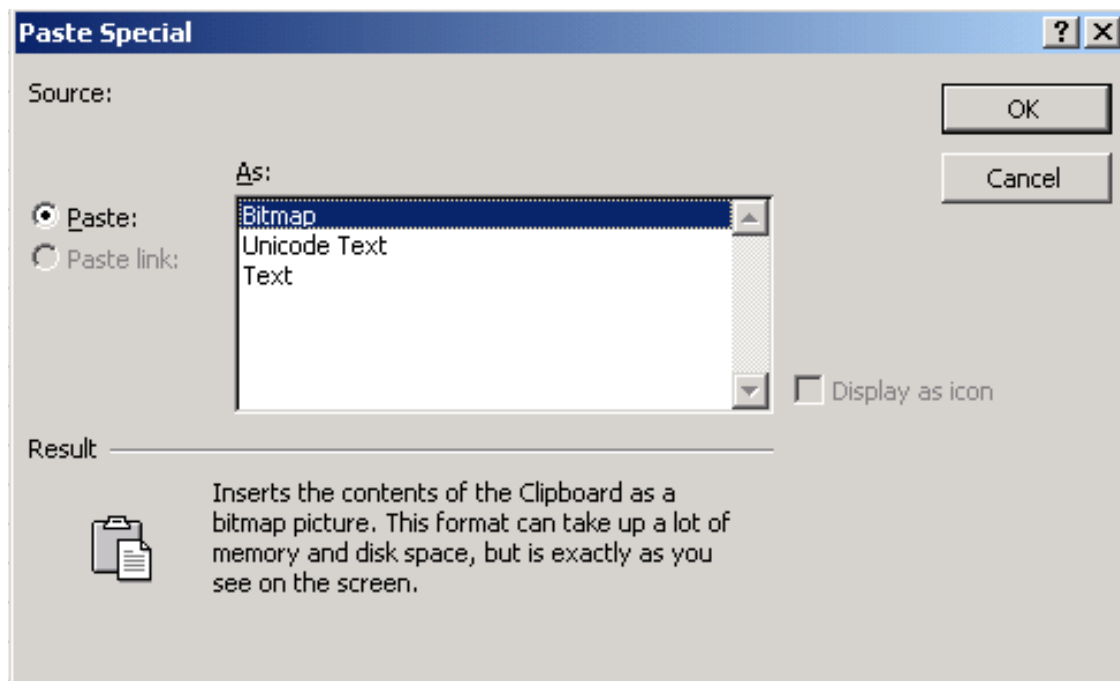
As shown in Figure 40, only the text of the table is copied into the spreadsheet. In this example, to fit the report in the spreadsheet, select the "Format" pull-down menu and choose "AutoFit Selection" under the "Columns" options.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Cancel Dero by Income for Dec 2000 to Feb 2001													
2	All Charge													
3														
4	Decision month: Dec 2000													
5	Income	Total n	Canc %	Appr %	Appr n	1%	2%	3%	4%	5%	6%	7%	8%	9%
6	0 <= x < 20000	169	0	37.28	63	0	0	0	3.17	6.35	9.52	11.11	11.11	11.11
7	20000 <= x < 28000	160	0.63	63.13	101	0	0	0.99	2.97	2.97	3.96	5.94	7.92	7.92
8	28000 <= x < 36000	99	3.03	72.73	72	0	0	0	2.78	4.17	6.94	6.94	11.11	11.11
9	36000 <= x < 50000	83	3.61	78.31	65	0	0	0	0	1.54	1.54	3.08	4.62	4.62
10	50000 <= x < 66000	61	1.64	86.89	53	0	0	0	0	0	0	0	0	0
11	66000 <= x < 86000	34	2.94	91.18	31	0	0	0	3.23	3.23	3.23	3.23	3.23	3.23
12	86000 <= x < 100000	8	0	87.5	7	0	0	0	14.29	14.29	14.29	14.29	14.29	14.29
13	100000 <= x < 150000	25	8	84	21	0	0	0	0	0	0	4.76	4.76	4.76
14	150000 <= x < 300000	6	0	100	6	0	0	0	0	0	0	0	0	0
15	300000 <= x	2	50	50	1	0	0	0	0	0	0	0	0	0
16	TOTAL	647	1.85	64.91	420	0	0	0.24	2.14	3.1	4.29	5.48	6.9	7
17														
18														
19														

**Figure 40: Pasting a Report Into a Microsoft® Excel Spreadsheet**

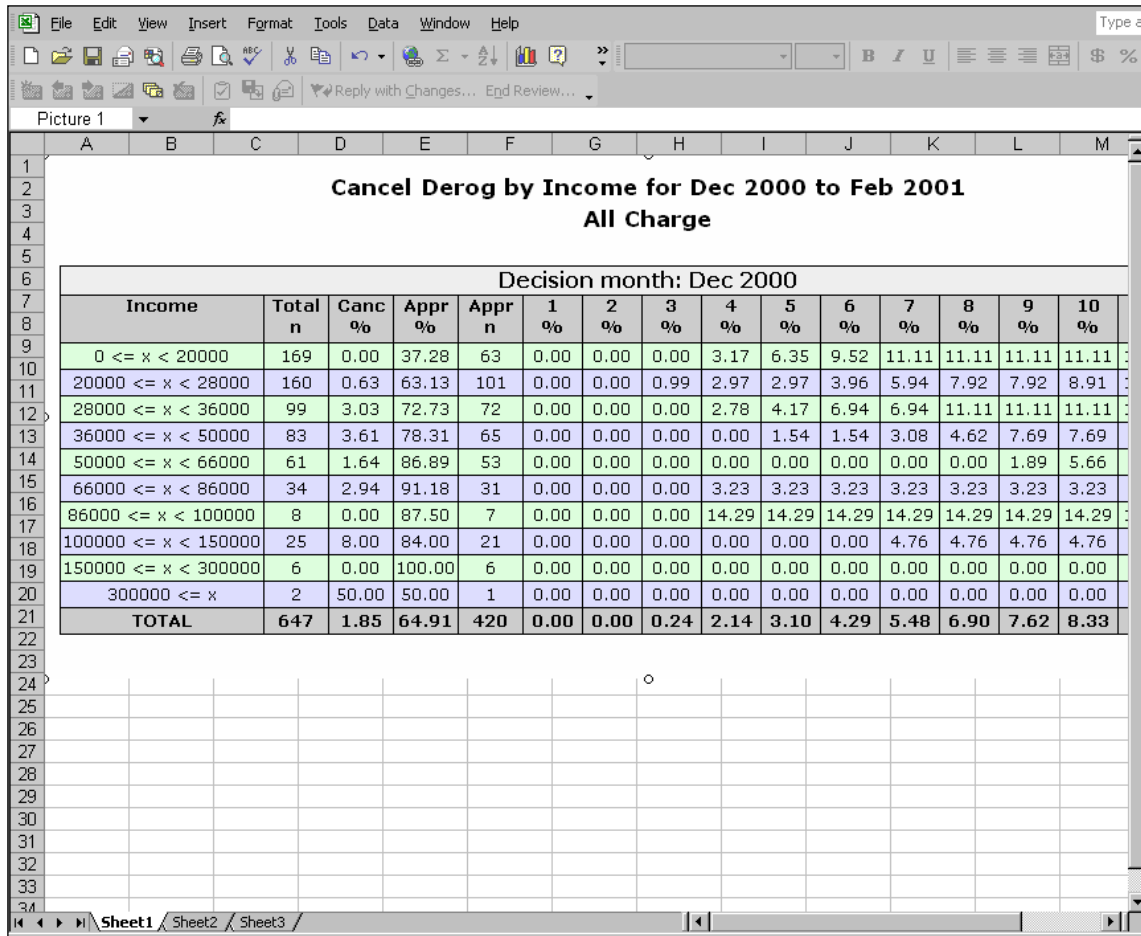


To copy the table or graph exactly as it appears in Acquis, select the table to be copied by clicking on that table, then select the "Copy" option under the "Edit" pull-down menu. Open a Microsoft® Excel spreadsheet, Microsoft® Word document, or Microsoft® PowerPoint presentation and choose the "Paste Special" option from the "Edit" pull-down menu. Under the "Source" dialogue box, choose the "Bitmap" option, and select the "OK" button. This will paste the entire table into the spreadsheet as a graphic image, rather than text.



**Figure 41: Paste Special Dialog Box For Pasting Tables as Graphic Images**

The table or graph is presented in a Bitmap format instead of just a plain text format as illustrated in Figure 42.



Cancel Derog by Income for Dec 2000 to Feb 2001 All Charge														
Decision month: Dec 2000														
Income	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %
0 <= x < 20000	169	0.00	37.28	63	0.00	0.00	0.00	3.17	6.35	9.52	11.11	11.11	11.11	11.11
20000 <= x < 28000	160	0.63	63.13	101	0.00	0.00	0.99	2.97	2.97	3.96	5.94	7.92	7.92	8.91
28000 <= x < 36000	99	3.03	72.73	72	0.00	0.00	0.00	2.78	4.17	6.94	6.94	11.11	11.11	11.11
36000 <= x < 50000	83	3.61	78.31	65	0.00	0.00	0.00	0.00	1.54	1.54	3.08	4.62	7.69	7.69
50000 <= x < 66000	61	1.64	86.89	53	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.89	5.66
66000 <= x < 86000	34	2.94	91.18	31	0.00	0.00	0.00	3.23	3.23	3.23	3.23	3.23	3.23	3.23
86000 <= x < 100000	8	0.00	87.50	7	0.00	0.00	0.00	14.29	14.29	14.29	14.29	14.29	14.29	14.29
100000 <= x < 150000	25	8.00	84.00	21	0.00	0.00	0.00	0.00	0.00	0.00	4.76	4.76	4.76	4.76
150000 <= x < 300000	6	0.00	100.00	6	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
300000 <= x	2	50.00	50.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>TOTAL</b>	<b>647</b>	<b>1.85</b>	<b>64.91</b>	<b>420</b>	<b>0.00</b>	<b>0.00</b>	<b>0.24</b>	<b>2.14</b>	<b>3.10</b>	<b>4.29</b>	<b>5.48</b>	<b>6.90</b>	<b>7.62</b>	<b>8.33</b>

**Figure 42: Table Pasted as a Bitmap Image in Microsoft® Excel Spreadsheet**

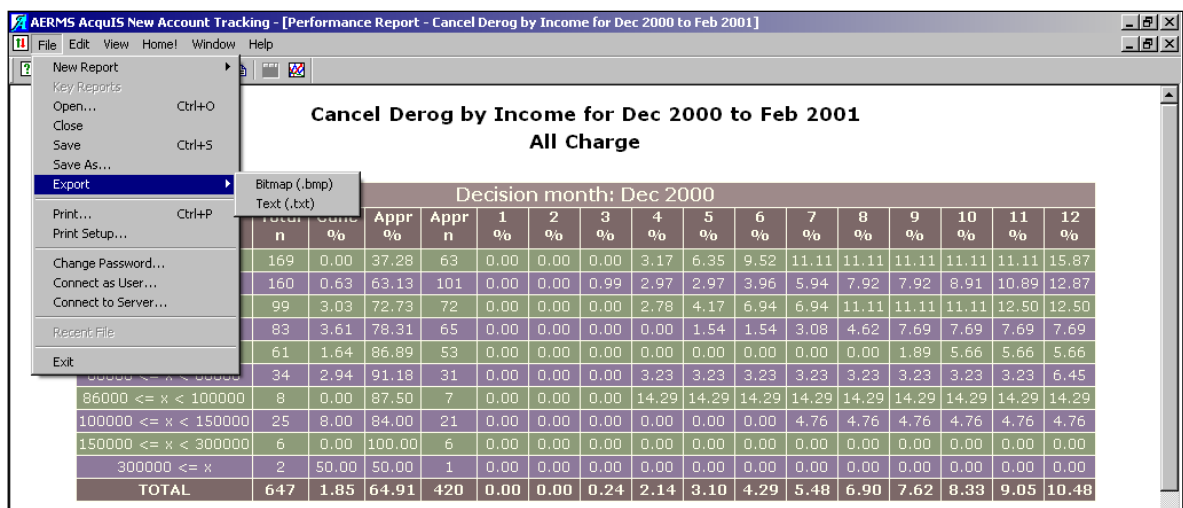


## Exporting Reports and Graphs

Reports can also be exported into a text file (.txt) or bitmap file (.bmp). A text file saves only the text of the table, while a bitmap file saves the table as a graphic that cannot be edited. Either a text file or a bitmap file can be exported to a Microsoft® PowerPoint presentation, Microsoft® Excel spreadsheet, or Microsoft® Word document.

Select the report to be exported by clicking on the report and choose the "Export" option from the "File" pull-down menu. A prompt appears to name and save the report to the area of your choosing. One or more tables can be exported simultaneously, but only one graph can be exported at a time.

**Note:** Graphs can only be exported into a bitmap file (.bmp), as described above.



**Figure 43: Exporting a Report Into a Different Program**



## Appendix 1: Performance Measures Available in AcquIS

Performance Measure	Definition
<b>Activity Rate</b>	The ratio of Cardmembers that have activity (spend, cash, or balance) to the total number of non-canceled Cardmembers
<b>Attain 30+ Days</b>	The percentage of non-canceled Cardmembers that reached or exceeded 30 days past due
<b>Attain 60+ Days</b>	The percentage of non-canceled Cardmembers that reached or exceeded 60 days past due
<b>Attain 90+ Days</b>	The percentage of non-canceled Cardmembers that reached or exceeded 90 days past due
<b>Average Balance Transfer</b>	The average non-canceled Cardmember balance transfer
<b>Average Cash Spending</b>	The average non-canceled Cardmember spend in cash
<b>Average Collection Balance</b>	The average amount of Cardmember balance in the month of cancellation, or at 90 days past due (for Charge also called CR Input)
<b>Average Line of Credit</b>	The average non-canceled Cardmember line of credit
<b>Average Spending</b>	The average non-canceled Cardmember spend including cash advances
<b>Average Utilization</b>	The ratio of non-canceled Cardmember balances to the sum of non-canceled Cardmember lines of credit
<b>Cancel Derog</b>	The cumulative percentage of Cardmembers that exceeded 90 days past due or were preemptively canceled by the credit department
<b>Cancel Voluntary</b>	The cumulative percentage of Cardmembers that canceled their account voluntarily
<b>Percent Users with Balance Transfer</b>	The percentage of non-canceled Cardmembers with a balance transfer
<b>Percent Users with Cash Spending</b>	The percentage of non-canceled Cardmembers with cash spending
<b>Percent Users with Revolving Balance</b>	The percentage of non-canceled Cardmembers with a revolving balance, as defined by the Participant
<b>Revolve Rate</b>	The percentage of dollars revolving for non-canceled Cardmembers, as defined by the Participant



Performance Measure	Definition
Total Collection Balance	The total amount of Cardmember balance in the month of cancellation at 90 days past due



## Appendix 2: Additional Examples of Where Statements

This appendix provides additional examples of Where statements used in various types of Acquis reports.

Where statements for Decision Reports are often used to check the various segments' approve, cancel, or decline rates. For example, to investigate the approval, decline, and cancel rates for those Cardmembers who are married, single, or have an income of \$20,000 or less, a Where statement can be created to separate and view only those Cardmembers for a Decision Report.

Begin by setting the query box with the same inputs as below, then select the "Edit" button next to the "Where" box in the Decision Report dialog box.

**Decision Report**

Months: April 02, May 02, June 02, July 02, August 02, September 02, October 02, November 02

Product(s): Charge (All), Credit (All)

Row Variable: Decision reason

Range Set: <default>

Where: [Empty text box] ... Edit...

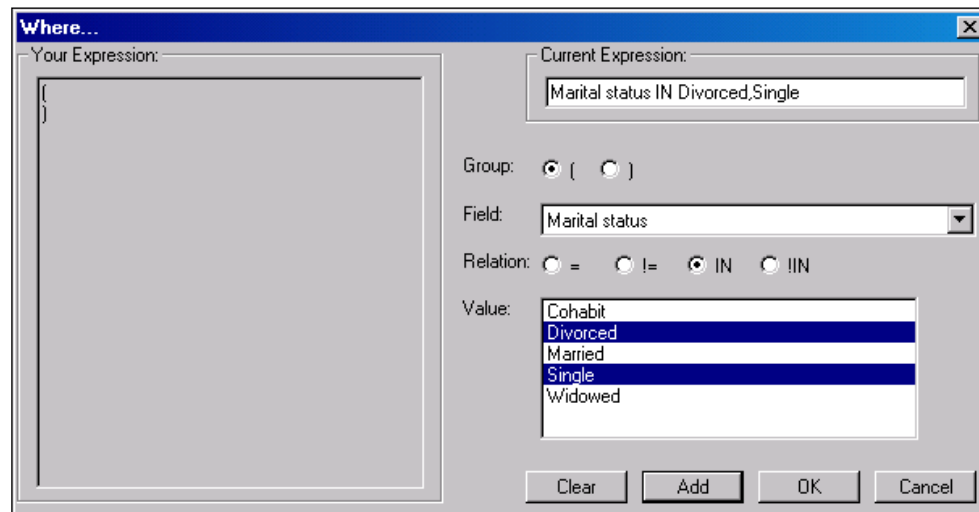
Recent 3, Recent 6, Recent 12, First 3, First 6, First 12, ☒ ALL

Make Key Report, OK, Cancel

**Figure 44: Example of Where Statement for a Decision Report**

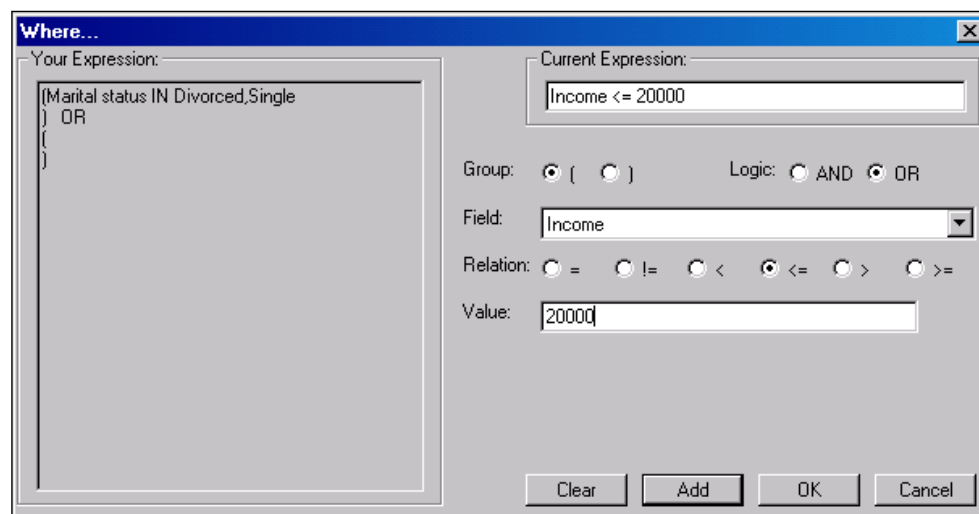


After selecting the "Edit" button, the "Where..." dialog box appears. First, select the "(" button from the "Group" option. Then select the "Marital Status" option from the "Field" pull-down menu and select the "IN" button in the "Relation" field. To select both the "Divorced" and "Single" category, select the Divorced category, hold down the control key, then select the "Single" category. Then select the "Add" button.



**Figure 45: Where Dialog Box With Marital Status Example**

To also include those individuals with an income of \$20,000 or less, move the cursor after the right parenthesis in the "Your Expression" box by selecting the ")" button next to the "Group" field, and then select the "OR" button next to the "Logic" field. Select the "(" button in the "Group" field, choose the "Income" option from the "Field" pull-down menu, select the "<=" button, and type in 20000 in the "Value" field.



**Figure 46: Where Dialog Box With Income Example**





Next, select the “Add” button to complete the expression.

**Figure 47: Completing the Where Statement Expression for a Decision Report**



The report shows the percent of individuals in each reason code category who were canceled, approved, or declined for only those Cardmembers who were divorced, single, or individuals with an income of \$20,000 or less for all Charge products.

**Decisions by Decision reason for Dec 2000 to Nov 2002**  
**All Charge, where (Marital status IN Divorced,Single )OR (Income <= 20000 )**

Dec 2000							
Decision reason	Approved n	Approved %	Canceled n	Canceled %	Declined n	Declined %	Total
AA	201	100.00	0	0.00	0	0.00	201
CA	0	0.00	3	100.00	0	0.00	3
CB	0	0.00	0	0.00	0	0.00	0
CE	0	0.00	0	0.00	0	0.00	0
CF	0	0.00	1	100.00	0	0.00	1
CL	0	0.00	1	100.00	0	0.00	1
CM	0	0.00	2	100.00	0	0.00	2
CN	0	0.00	0	0.00	0	0.00	0
CP	0	0.00	2	100.00	0	0.00	2
CQ	0	0.00	1	100.00	0	0.00	1
CU	0	0.00	1	100.00	0	0.00	1
D1	0	0.00	0	0.00	0	0.00	0
D3	0	0.00	0	0.00	0	0.00	0
DA	0	0.00	0	0.00	0	0.00	0
DC	0	0.00	0	0.00	68	100.00	68
DD	0	0.00	0	0.00	1	100.00	1
DE	0	0.00	0	0.00	0	0.00	0
DF	0	0.00	0	0.00	0	0.00	0
DI	0	0.00	0	0.00	10	100.00	10
DJ	0	0.00	0	0.00	0	0.00	0
DM	0	0.00	0	0.00	2	100.00	2
DN	0	0.00	0	0.00	4	100.00	4
DS	0	0.00	0	0.00	132	100.00	132
DT	0	0.00	0	0.00	1	100.00	1
DX	0	0.00	0	0.00	0	0.00	0
CO	0	0.00	1	100.00	0	0.00	1
CR	0	0.00	0	0.00	0	0.00	0

**Figure 48: Where Statement For Decision Report Table Example**



Where statements for Distribution Reports are created to see the quantity and percentage of individuals partitioned by certain characteristics. For this example, a Distribution Report is created to see the percentage of Cardmembers with various source codes for certain regions using specific postal or province codes.

Begin by setting the query box with the same inputs below, and then select the "Edit" button next to the "Where" box in the Distribution Report dialog box.

**Distribution Report**

Months:

- April 02
- May 02
- June 02
- July 02
- August 02
- September 02
- October 02
- November 02

☐ Recent 3    ☐ First 3

☐ Recent 6    ☐ First 6

☒ Recent 12    ☐ First 12

Product(s):

Charge: All

- Personal Charge
- Gold Charge

Credit: All

- Blue Credit

Row Variable:

Source 1

Range Set:

<default>

Where:

...

Edit...

Make Key Report

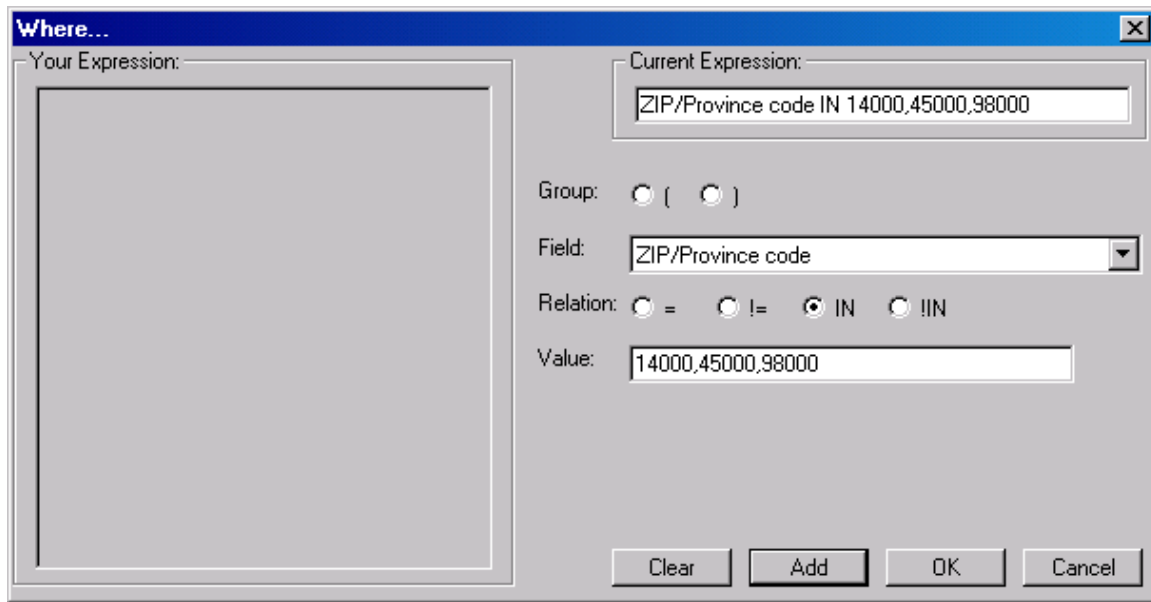
OK

Cancel

**Figure 49: Example of Where Statement For a Distribution Report**



Under the "Where" dialog box, select the "ZIP/Province Code" from the "Field" pull-down menu, select the "IN" button, and type in the ZIP/Province codes in the "Value" field to be included in the report. Then select the "Add" button.



**Figure 50: Where Dialog Box With Application ID Example**



The report shows the quantities and percentages of the different Source 1 codes for the ZIP/Province code of 14000, 45000, and 98000 for all Charge products.

Quantities													
Source 1	Dec 2001	Jan 2002	Feb 2002	Mar 2002	Apr 2002	May 2002	Jun 2002	Jul 2002	Aug 2002	Sep 2002	Oct 2002	Nov 2002	Total
FSI (Bank Distribution)	0	0	0	0	0	0	0	0	0	0	0	1	1
Direct Mail	0	0	0	2	3	0	0	0	6	1	1	0	13
Enquiries	0	0	0	1	1	1	0	1	2	2	2	0	10
Gold Conversion	2	0	0	0	0	1	0	1	1	1	1	0	7
Corporate (Dual Card)	0	0	0	0	0	1	2	1	0	1	0	2	7
MR Partners	1	0	0	0	1	0	1	0	2	2	1	0	8
Take One	1	1	1	2	3	0	3	2	0	0	1	2	16
Direct Sales	1	1	1	0	2	0	0	0	0	0	0	0	5
Internet	0	0	0	1	0	0	0	2	1	1	0	0	5
<b>Total</b>	<b>5</b>	<b>2</b>	<b>2</b>	<b>6</b>	<b>10</b>	<b>3</b>	<b>6</b>	<b>7</b>	<b>12</b>	<b>8</b>	<b>6</b>	<b>5</b>	<b>72</b>

Percentages													
Source 1	Dec 2001	Jan 2002	Feb 2002	Mar 2002	Apr 2002	May 2002	Jun 2002	Jul 2002	Aug 2002	Sep 2002	Oct 2002	Nov 2002	Total
FSI (Bank Distribution)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	20.00	1.39
Direct Mail	0.00	0.00	0.00	33.33	30.00	0.00	0.00	0.00	50.00	12.50	16.67	0.00	18.06
Enquiries	0.00	0.00	0.00	16.67	10.00	33.33	0.00	14.29	16.67	25.00	33.33	0.00	13.89
Gold Conversion	40.00	0.00	0.00	0.00	0.00	33.33	0.00	14.29	8.33	12.50	16.67	0.00	9.72
Corporate (Dual Card)	0.00	0.00	0.00	0.00	0.00	33.33	33.33	14.29	0.00	12.50	0.00	40.00	9.72
MR Partners	20.00	0.00	0.00	0.00	10.00	0.00	16.67	0.00	16.67	25.00	16.67	0.00	11.11
Take One	20.00	50.00	50.00	33.33	30.00	0.00	50.00	28.57	0.00	0.00	16.67	40.00	22.22
Direct Sales	20.00	50.00	50.00	0.00	20.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	6.94
Internet	0.00	0.00	0.00	16.67	0.00	0.00	0.00	28.57	8.33	12.50	0.00	0.00	6.94
<b>Total</b>	<b>6.94</b>	<b>2.78</b>	<b>2.78</b>	<b>8.33</b>	<b>13.89</b>	<b>4.17</b>	<b>8.33</b>	<b>9.72</b>	<b>16.67</b>	<b>11.11</b>	<b>8.33</b>	<b>6.94</b>	<b>100.00</b>

Figure 51: Where Statement For Distribution Report Table Example



A Where statement is also used with Performance Reports to partition row or table variables by certain characteristics. Begin by setting the query box with the same inputs as below, and then select the "Edit" button next to the "Where" box in the Performance Report dialog box.

**Performance Report**

Months:

- October 01
- November 01
- December 01
- January 02
- February 02
- March 02
- April 02
- May 02
- June 02
- July 02
- August 02
- September 02
- October 02

Product(s):

Charge	Credit
Personal Charge	Blue Credit
Gold Charge	

Performance Measure: Cancel Derog

Table Variable: Single Table

Row Variable: Decision month

Range Set: <default>

Where:

Make Key Report OK Cancel

**Figure 52: Example of Where Statement For a Performance Report**



After selecting the "Edit" button, the "Where" dialog box appears. Select "Source 1" from the "Field" pull-down menu and select the desired source code from the "Value" drop-down menu (e.g., Direct Sales), select the "=" button in the Relation field, and click the "Add" button. Then select the "AND" button, choose the "Self-Employed" option from the "Field" pull-down menu, select the "=" button in the Relation field and "Yes" in the "Value" field, and select the "Add" button.

**Figure 53: Completing the Where Statement Expression For a Performance Report**

The report includes only those individuals who are self-employed with a source code of "Direct Sales."

**Cancel Derog by Decision month for Dec 2000 to Nov 2002  
All Charge, where Source 1 = Direct Sales AND Self-employed = Yes**

Totals																
Decision month	Total n	Canc %	Appr %	Appr n	1 %	2 %	3 %	4 %	5 %	6 %	7 %	8 %	9 %	10 %	11 %	12 %
Dec 2000	18	0.00	44.44	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Jan 2001	19	0.00	52.63	10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10.00	10.00
Feb 2001	30	0.00	46.67	14	0.00	0.00	0.00	0.00	0.00	0.00	7.14	7.14	7.14	7.14	7.14	7.14
Mar 2001	14	7.14	57.14	8	0.00	0.00	0.00	0.00	0.00	0.00	12.50	12.50	12.50	12.50	12.50	12.50
Apr 2001	2	0.00	50.00	1	0.00	0.00	0.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00	100.00
May 2001	2	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
Aug 2001	2	0.00	50.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sep 2001	4	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
Oct 2001	6	16.67	50.00	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Nov 2001	3	0.00	66.67	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Dec 2001	2	50.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
Jan 2002	7	0.00	42.86	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-
Feb 2002	2	0.00	50.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-	-
Mar 2002	1	0.00	100.00	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-	-
Apr 2002	1	0.00	0.00	0	-	-	-	-	-	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>113</b>	<b>2.65</b>	<b>46.02</b>	<b>52</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>1.92</b>	<b>1.92</b>	<b>1.92</b>	<b>5.77</b>	<b>5.77</b>	<b>5.77</b>	<b>5.88</b>	<b>8.00</b>	<b>8.51</b>

**Figure 54: Where Statement For Performance Report Table Example**