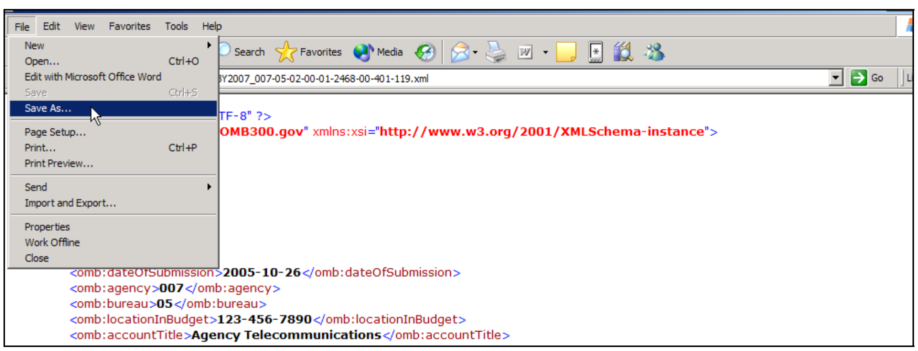
2. Once the investment has passed the validation, the XML 300 document can be generated. From within the new pop-up window, click on the **Export XML** icon ().

The XML document will be presented in the same window.


3. From within the XML window, click on **File**.

4. Select **Save As** to save the XML document.




## *4.7 Investment Revisions*

A Revision is created whenever an investment is being finalized. Users can finalize an investment to move it to a new Budget Year or to simply close it out in the same Budget Year if no further modifications will be required or if numerous modifications have been made and a newer version is needed.

To have access to the new template so that all OMB required fields for that Budget Year can be answered for the investment, a revision will have to be made. Each time a new Budget Year is introduced, the application supports the added template. So, if the

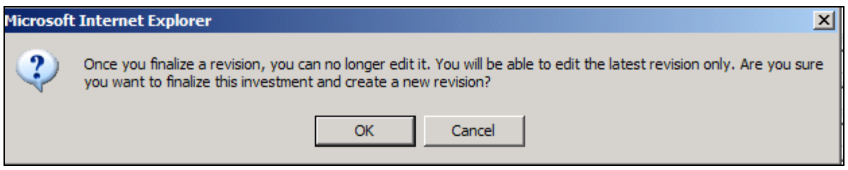
BY2009 template is introduced, with each template containing the OMB required fields for that Budget Year as well as any agency specific processes that have been developed.

### 4.7.1 Creating an Investment Revision

To Create a Revision:

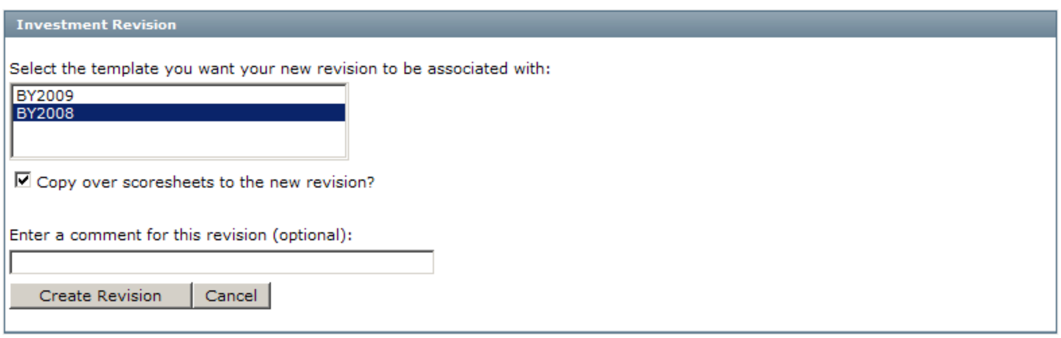
1. From within the investment that will be finalized, click on the **Investment Revision** icon in the toolbar.

A message will appear warning users that once a revision is finalized, it can no longer be edited. *Make sure the investment is ready to be finalized*.




**Note: A finalized investment can no longer be edited, but will be available for viewing through the Investments module.**

2. Select **OK** if the investment is ready to be finalized. The Investment Revision form will appear:




3. Select the **template** the revision will be in. Select the **same template** if the investment is finally being closed out and no further modifications will be required, or if there have been numerous modifications made and a newer version is needed. If you wish to move the Investment to the **next budget year template**, you may select that template from the list.

**Note: Once an investment is moved into the new budget year process, it cannot revert back to the previous Budget Year's template. Users would never see the**

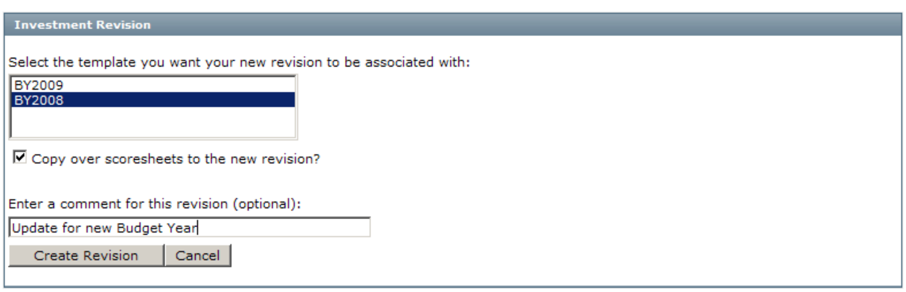
**BY2008 template as an option for an investment that is currently in the BY2009 template. Nor can they skip a year and jump from BY2007 to BY2009.**

4. If there are Scoresheets associated with the investment, check whether or not the Scoresheets will copy over with the investment.

The box will be checked by default. If users **Check** "*Copy over scoresheets to the new revision*", then the previous Scoresheet will copy over and will be listed in the Scoring module under the Scoresheets link. Users will be able to see the previous scoring rates and edit them to reflect any changes needed for the revised investment. System Administrators will also be able to set a new Authoritative Record or choose the previous Authoritative Record, by comparing the final score from the previous investment and the new score made from any edits, or any new Scoresheets created for the revised investment. This will allow for a new Authoritative record to be set since no set Authoritative Record will be copied over. However, System Administrators will have the ability to 'view' the previous Scoresheets Authoritative Record.

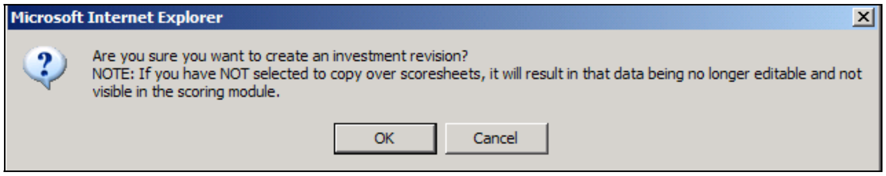
If users **Uncheck** "*Copy over scoresheets to the new revision*", then there will be no Scoresheets listed for the investment in the Scoring module under the Scoresheets link. For the System Administrator to set a new Authoritative Record, new Scoresheets will have to be created and assessed. After new Scoresheets have been assessed, then the System Administrator will be able to 'view' the previous scores. However, previous Scoresheets will not be available to set as a new Authoritative Record.

5. Users can also enter a Revision comment. This field is optional. If they choose to enter a comment, it will be associated with the investment that is being finalized. The comment will be displayed as part of the first section and sub-section in the finalized version of the investment and in the Investment Revision listing.

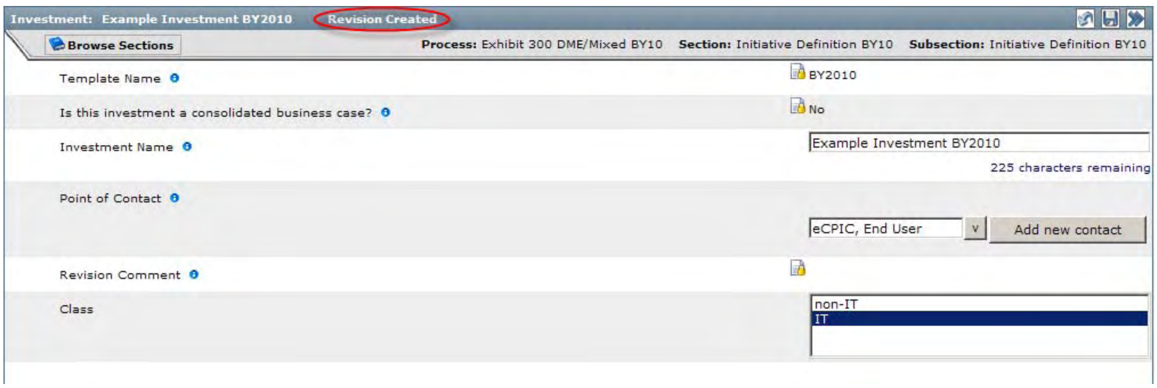



6. Click **Create Revision**.

7. The application will now prompt users to confirm that they want to create a revision. Click **OK** to confirm.




After the new revision is created, users will be directed to the *Investment Definition* section of the new template. 'Revision Created' will appear. The template will be changed and the number of revisions made will change. (*0= original version, 1= revision, 2=revision, etc*.).




### 4.7.1.1 Financial Table Revision to a New Template Year

When data is carried over from one template year business case to a new template as part of creating a revision, please be aware that the data reported in the financial tables (Summary of Spending, Funding Sources, Full Time Equivalents, and Quantitative Benefits) will shift to the left. eCPIC accounts for full lifecycle costs by setting the column headers on the financial for the outermost years, PY-6 and BY+8, to include "and Prior" and "and Beyond". Furthermore, upon revision to a new template year, eCPIC aggregates the data in the PY-6 column, by summing the values currently in the PY-6 column with the PY-5 values as it shifts the data to adjust for the new seventeen year range.

Below is an example of the Summary of Spending table before and after a new template revision within the within eCPIC. The screenshot below shows the Summary of Spending table setup in the BY2009 template, prior to revision.

SUMMARY OF SPENDING FOR PROJECT STAGES

Toggle Excel Import | View Accessible Table | Hide All | Level 0 Submit * Costs in thousands

| | 2001 and Prior | 2002 | 2003 | 2004 | 2005 | 2006 | PY 2007 | CY 2008 | BY 2009 | BY + 1 2010 | BY + 2 2011 | BY + 3 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Planning | | | | | | | | | | | | | | | |
| Budgetary Resources | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 |
| Acquisition | | | | | | | | | | | | | | | |
| Budgetary Resources | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 |
| Subtotal Planning & Acquisitio | | | | | | | | | | | | | | | |
| Budgetary Resources | 200 | 400 | 600 | 800 | 1000 | 1200 | 1400 | 1600 | 1800 | 2000 | 2200 | 2400 | 2600 | 2800 | 3000 |
| Operations & Maintenance | | | | | | | | | | | | | | | |
| Budgetary Resources | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 |
| TOTAL | | | | | | | | | | | | | | | |
| Budgetary Resources | 300 | 600 | 900 | 1200 | 1500 | 1800 | 2100 | 2400 | 2700 | 3000 | 3300 | 3600 | 3900 | 4200 | 4500 |
| Government FTE Costs | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Planning | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Acquisition | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Maintenance | | | | | | | | | | | | | | | |

Update Datagrid Values

Below is the same Summary of Spending table after it has been revised into a new template year. Notice that the 100 in the "2001 and Prior" column and the 200 in the "2002" have been added together to make the "2001 and Prior" value 300. All other values are shifted one column to the left.

SUMMARY OF SPENDING FOR PROJECT STAGES

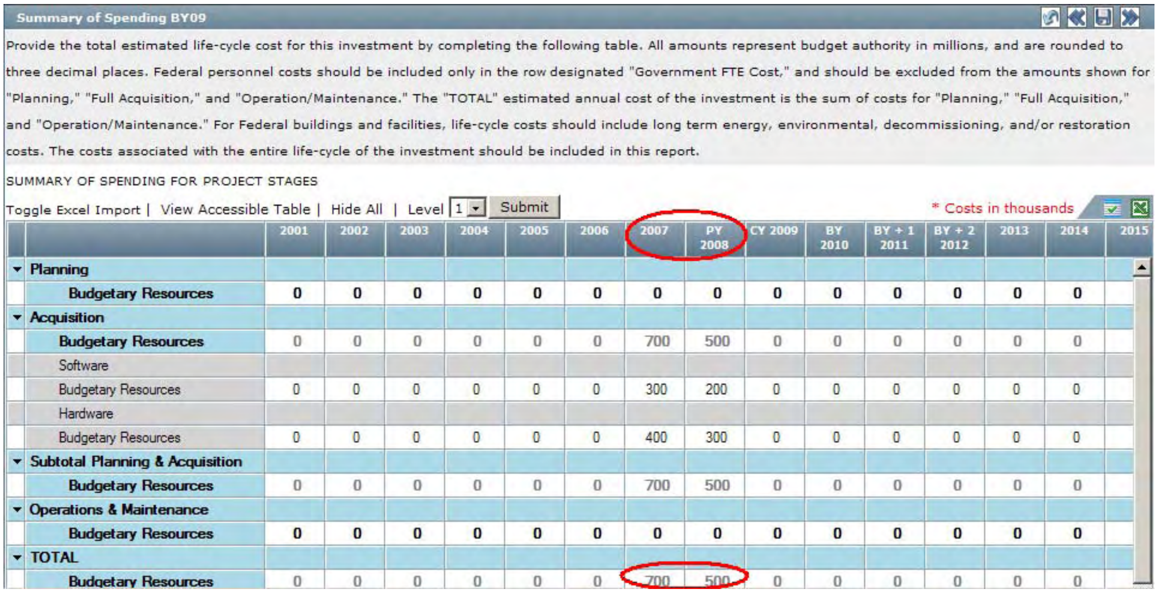
Toggle Excel Import | View Accessible Table | Hide All | Level 0 Submit * Costs in thousands

| | 2002 and Prior | 2003 | 2004 | 2005 | 2006 | 2007 | PY 2008 | CY 2009 | BY 2010 | BY + 1 2011 | BY + 2 2012 | BY + 3 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Budgetary Resources | 300 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 | 1600 |
| Acquisition | | | | | | | | | | | | | | | |
| Budgetary Resources | 300 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 | 1600 |
| Subtotal Planning & Acquisitio | | | | | | | | | | | | | | | |
| Budgetary Resources | 600 | 600 | 800 | 1000 | 1200 | 1400 | 1600 | 1800 | 2000 | 2200 | 2400 | 2600 | 2800 | 3000 | 3200 |
| Operations & Maintenance | | | | | | | | | | | | | | | |
| Budgetary Resources | 300 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1000 | 1100 | 1200 | 1300 | 1400 | 1500 | 1600 |
| TOTAL | | | | | | | | | | | | | | | |
| Budgetary Resources | 900 | 900 | 1200 | 1500 | 1800 | 2100 | 2400 | 2700 | 3000 | 3300 | 3600 | 3900 | 4200 | 4500 | 4800 |
| Government FTE Costs | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Planning | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Acquisition | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Maintenance | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Update Datagrid Values

#### *4.7.1.1.1 Post Submission View*

Once submissions have been completed for the current budget years, System Administrators have the ability to change the Budget Year Reporting application configuration setting. Upon changing this setting to *'Post Submission'*, the labels for the SOS, FTE Table, and Funding Source Previous Year (PY), Current Year (CY), and Budget Year (BY) will all shift accordingly. This will allow users to continue to input SOS financial data post submission but prior to the release of the new budget year template in eCPIC.



Summary of Spending BY09

Provide the total estimated life-cycle cost for this investment by completing the following table. All amounts represent budget authority in millions, and are rounded to three decimal places. Federal personnel costs should be included only in the row designated "Government FTE Cost," and should be excluded from the amounts shown for "Planning," "Full Acquisition," and "Operation/Maintenance." The "TOTAL" estimated annual cost of the investment is the sum of costs for "Planning," "Full Acquisition," and "Operation/Maintenance." For Federal buildings and facilities, life-cycle costs should include long term energy, environmental, decommissioning, and/or restoration costs. The costs associated with the entire life-cycle of the investment should be included in this report.

SUMMARY OF SPENDING FOR PROJECT STAGES

Toggle Excel Import | View Accessible Table | Hide All | Level 1 Submit

* Costs in thousands

| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | PY 2008 | CY 2009 | BY 2010 | BY + 1 2011 | BY + 2 2012 | 2013 | 2014 | 2015 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Planning | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Acquisition | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 700 | 500 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Software | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 300 | 200 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Hardware | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 400 | 300 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Subtotal Planning & Acquisition | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 700 | 500 | 0 | 0 | 0 | 0 | 0 | 0 | |
| Operations & Maintenance | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |
| TOTAL | | | | | | | | | | | | | | | |
| Budgetary Resources | 0 | 0 | 0 | 0 | 0 | 0 | 700 | 500 | 0 | 0 | 0 | 0 | 0 | 0 | |

### 4.7.1.2 Creating Revisions of a Consolidated Business Case

There are several options for children investments when users wish to finalize and create a new revision of a consolidated business case. They are as follows:

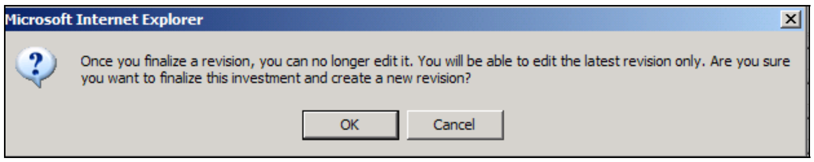
- When a parent investment is finalized (*in the same template or new template*) and users **uncheck** *"This investment is a consolidated business case. Finalize and create revisions for sub-investments also?"* they will choose to associate the parents current sub-investments with the new parent revision. No revisions to the children will be made (*all fields and data will remain the same*). The relationship between the old version of the parent and each of its children will be broken. So, if users go to 'view' the old version of the SOS table for the parent investment, there will no longer be data in the table because there are no longer any children associated with the old parent version. Therefore, there will be no rolled up values.

- When a parent investment is finalized (*in the same template or new template*), and users **check** *"This investment is a consolidated business case. Finalize and create revisions for sub-investments also?"* they will choose to create revisions of each of the children investments and associate them with the new parent revision. The relationship between the old version of the parent and each of its children will be maintained. Be advised, for each investment (the parent and all the children) all new fields that have been added to the new template will have to be answered and some fields will have to be edited to reflect changes made to the new template.

*The revision information such as any comments and the number of revisions made will only show on the parent's finalized investment*

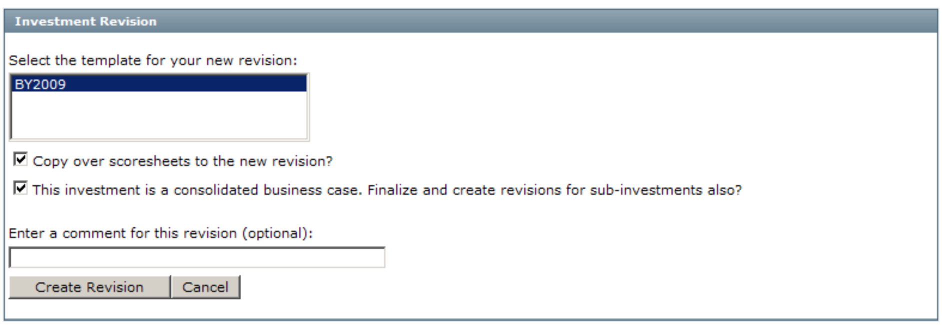
1. From within the parent investment, click on the **Investment Revision** icon ( ).

A message will appear warning users that once they finalize a revision, it can no longer be edited. *Make sure the investment is ready to be finalized.*




**Note: A finalized investment can no longer be edited, but will be available for viewing through the Investments module.**

2. Select **OK** if to finalize the investment. The Investment Revision screen will appear:




Users will be asked to specify which template they want the new revision to be in. In the image above, the BY2009 is presented as the only option because the consolidated business case was created in that template and it cannot revert back.

If a parent investment is created in the BY2008 template, both BY2008 and BY2009 templates will be available for options.

3. The checkbox at the bottom of the window allows users to indicate whether they want to finalize and create revisions for sub-investments also. If users **check, "***This investment is a consolidated business case. Finalize and create revisions for sub-investments also?***"** they will choose to create revisions of each of the children investments and associate them with the new parent revision. The relationship between the old version of the parent and each of its children will be maintained. Be advised, for each investment (the parent and all the children) all new fields

that have been added to the new template will have to be answered and some fields will have to be edited to reflect changes made to the new template.

If users **uncheck** *"This investment is a consolidated business case. Finalize and create revisions for sub-investments also?"* they will choose to associate the parent's current sub-investments with the new parent revision. No revisions to the children will be made (*all fields and data will remain the same*). The relationship between the old version of the parent and each of its children will be broken. So, if they go to 'view' the old version of the SOS table for the parent investment, there will no longer be data in the table because there are no longer any children associated with the old parent version. Therefore, there will be no rolled up values.

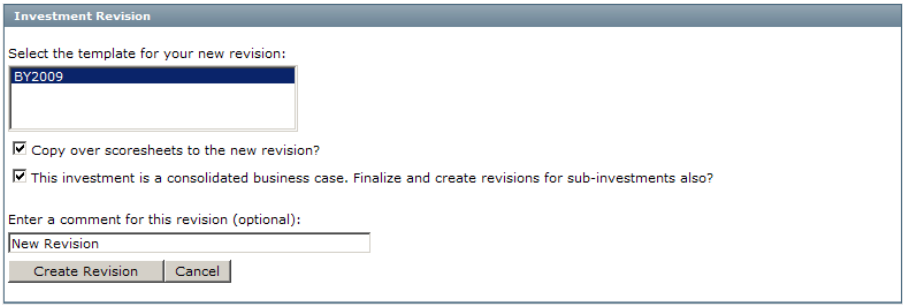
*The revision information such as comments and the number of revisions made will only show on the parent's finalized investment*

4. If there are Scoresheets associated with the consolidated business case, check whether or not the Scoresheets will copy over with the consolidated business case.

The box will be checked by default. If users **check** "*Copy over scoresheets to the new revision*", then the previous Scoresheet will be copied over and will be listed in the Scoring module under the Scoresheets link. Users will be able to see the previous scoring rates and edit them to reflect any changes needed for the revised investment. System Administrators will also be able to set a new Authoritative Record or choose the previous Authoritative Record, by comparing the final score from the previous investment and the new score made from any edits or any new Scoresheets created for the revised investment. This will allow for a new Authoritative record to be set since no set Authoritative Record will be copied over. However, System Administrators will have the ability to 'view' the previous Scoresheets Authoritative Record.

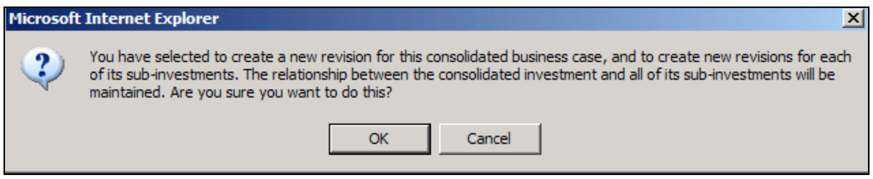
If users **uncheck** "*Copy over scoresheets to the new revision*", then there will be no Scoresheets listed for this investment in the Scoring module under the Scoresheets link. In order for the System Administrator to set a new Authoritative Record, new Scoresheets will have to be created and assessed. After new Scoresheets have been assessed, then the System Administrator will be able to 'view' the previous scores. However, previous Scoresheets will not be available to set as a new Authoritative Record.

5. Users can also enter a Revision comment. This field is optional. If they choose to enter a comment, it will be associated with the parent investment that is being finalized. The comment will be displayed as part of the first section and sub-section in the finalized version of the investment and in the Investment Revision listing.

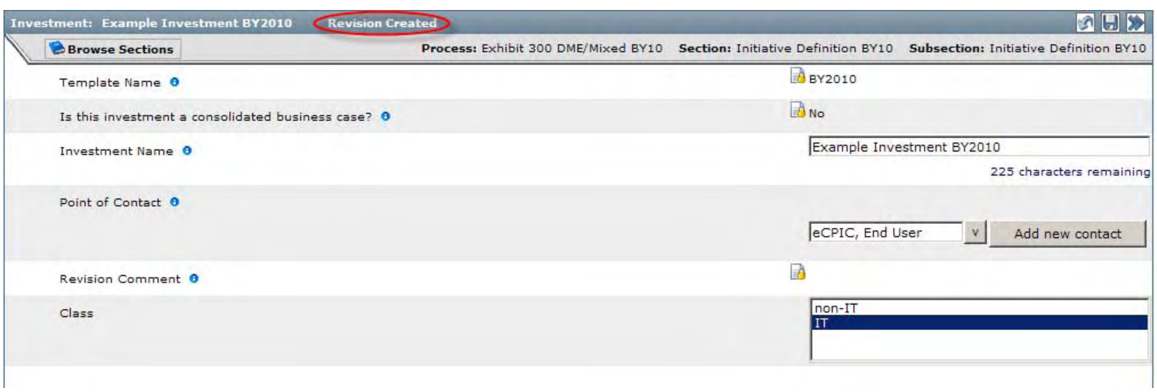



6. Click **Create Revision**.

7. The application will now prompt to confirm that users want to create a revision. Click **OK** to confirm.

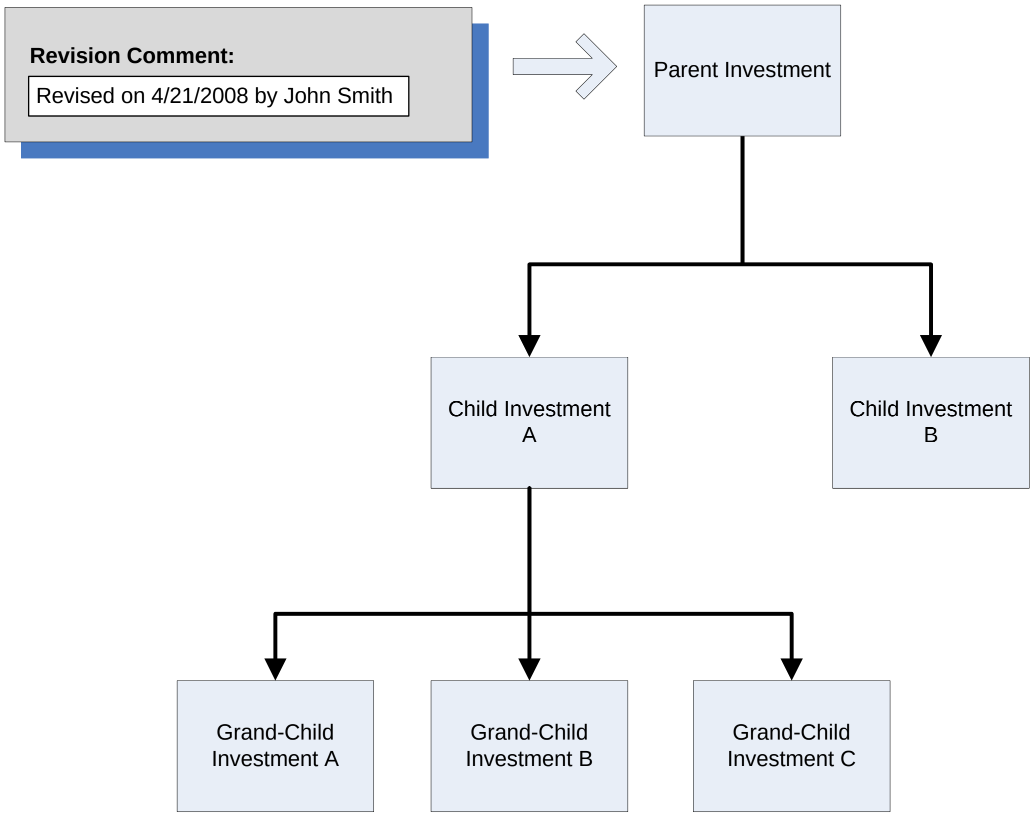



After the new revision is created, users will be directed to the *Investment Definition* section of the new template. ‘Revision Created’ will appear. The template will be changed and the number of revisions made will change. (*0= original version, 1= revision, 2=revision, etc*).




### *4.7.1.2.1 CBC Revision Comment Propagation*

When revising Consolidated Business Case (CBC) investments, users have the option to enter a revision comment for the investment being revised. When a CBC is being revised and a revision comment is entered, eCPIC will propagate that revision comment to all of the child investments, through all levels, that are revised along with the CBC. Below is an illustration of how this works.




### 4.7.2 Accessing Previous Revisions of an Investment

#### 4.7.2.1 Investment Listing

If needed, users can go back and view a previous revision of an investment.

1. Click on the **Investment** module.

2. In the Standard View, each investment is listed with the number of revisions made. Click on the Revision number for the investment to reveal a list of investment revisions. (*When placing the mouse over this column, it will highlight a different color then the rest of the columns because clicking on this link will take users to a different screen then the rest of the columns*).

- Show Field Filter -

| Investment Name | Template | Class | OMB Investment Type | Consolidated Business Case | Rev | Point of Contact | Last Updated |
|---|---|---|---|---|---|---|---|
| Demo Investment 1 | BY2008 | IT | 01 - Major Investment | | 1 | eCPIC, Admin | 05/07/2007 10:52 AM |
| Demo Investment 2 | BY2008 | IT | 01 - Major Investment | | 1 | eCPIC, Admin | 06/01/2007 10:30 AM |
| A Monthly EVMS Example Investment | BY2009 | non-IT | 01 - Major Investment | Child | 4 | User, eCPIC | 06/01/2007 12:11 AM |
| BY2009 Investment | BY2009 | IT | 01 - Major Investment | Child | 3 | User, eCPIC | 06/01/2007 12:14 AM |
| CBC Investment A | BY2009 | IT | 01 - Major Investment | Parent | 2 | User, eCPIC | 06/01/2007 12:10 AM |
| CBC Investment B | BY2009 | IT | 01 - Major Investment | Parent / Child | 2 | User, eCPIC | 06/01/2007 12:12 AM |
| CBC Investment C | BY2009 | IT | 01 - Major Investment | Parent | 1 | User, eCPIC | 06/01/2007 12:04 AM |
| Investment A | BY2009 | IT | 01 - Major Investment | | 2 | User, eCPIC | 06/01/2007 09:20 AM |
| Investment B | BY2009 | IT | 01 - Major Investment | | 2 | User, eCPIC | 06/01/2007 09:21 AM |
| Investment C | BY2009 | IT | 01 - Major Investment | | 3 | User, eCPIC | 06/01/2007 11:56 AM |

Page 1 of 3 Show 10 results per page

The Revision Listing screen will appear:

| Investment Name | Revision | Action | Revision Comment |
|---|---|---|---|
| BY2009 Investment | 3 | Edit | |
| BY2008 Investment | 2 | View | |
| BY2008 Investment | 1 | View | Revision Update 2 |
| BY2008 Investment | 0 | View | Revision Update 1 |

Page 1 of 1 Show 10 results per page

The listing of investment revisions shows the Name (*as it was when the revision was made*), the Revision number, and the Action available to users when they access the revision (Edit/View). 'Edit' will show for the current working copy.

3. Click on the Investment Name, Revision number, Action, or Revision Comment of the version to view. All are links to that revision.

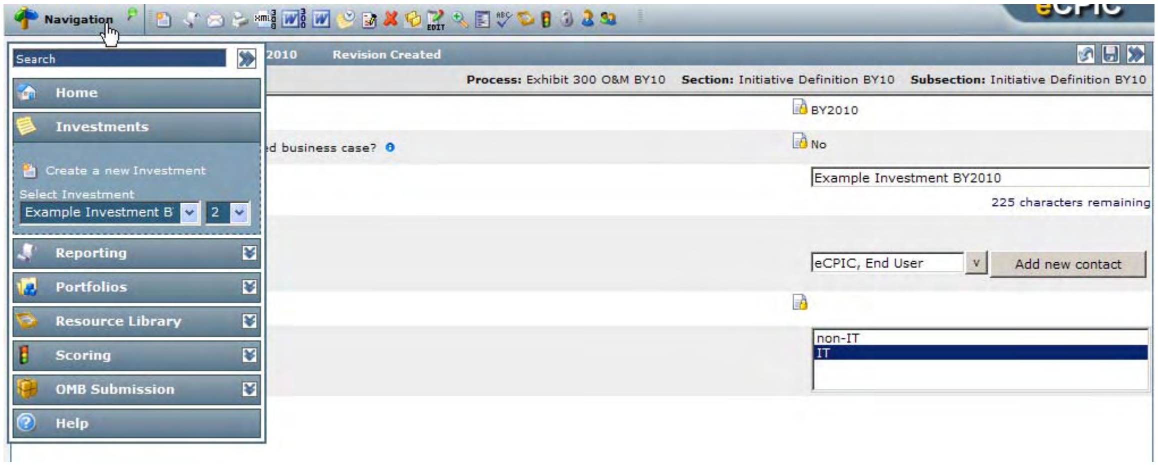
**Note: Revisions of investments that are not the latest working version will be displayed in 'view' only mode. Switching back to the latest working revision using the drop-down will not automatically change to 'edit' mode. The user must manually make this change once in the working version by clicking on the Edit/View toggle on the icon toolbar. When the icon reads 'View', the Investment is in view mode. Clicking on 'View' will switch to 'Edit' mode and the Edit/View toggle will now read 'Edit'.**

All data in the table can be exported to Excel by clicking on the Excel Export ( ) icon.

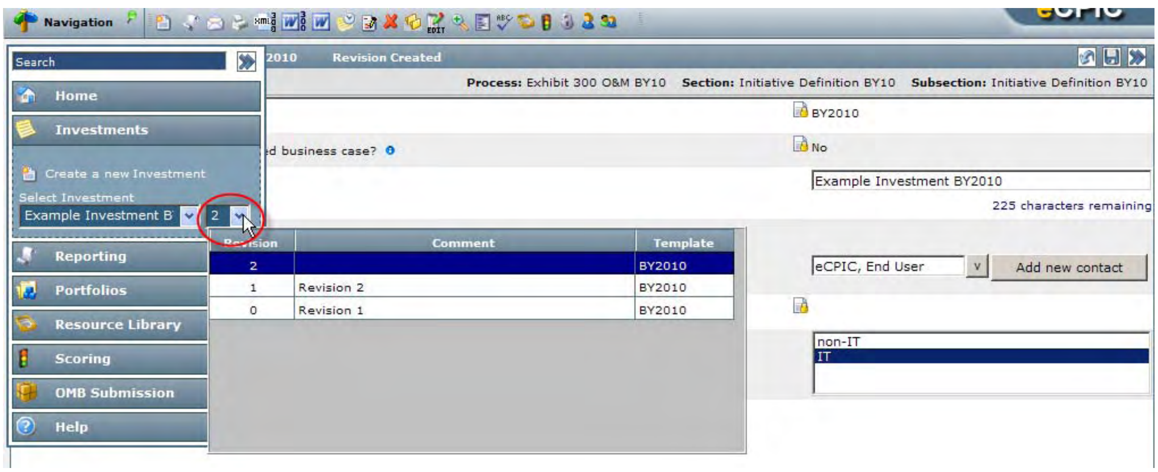
### 4.7.2.2 Jump to Investment Revision

Within the Investments module, users can easily jump to a different Revision of the selected investment at any time. There can be many different Revisions of an investment.

1. Open the Navigation Tree from within an investment




2. Click on the revision drop-down list to the right of the Select Investment drop-down list. The investment revision history list will display.

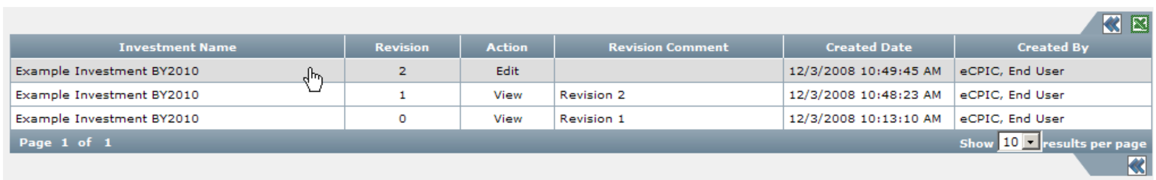



#### 4.7.2.3 Investment History (Revision List) Link

When viewing an investment, users will now have the capability to navigate to a listing of the different revisions of the current investment via the investment revision icon ( ).

1. Open an existing investment.
2. Click the down on the **Investment Revision** icon to reveal previous revisions of the current investment.


3. The revision history list will open and it will contain active links to all available investment revisions.



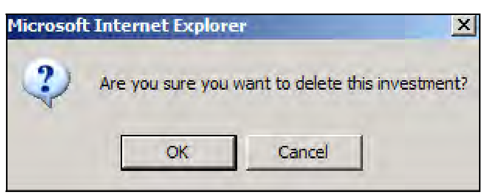
| Investment Name | Revision | Action | Revision Comment | Created Date | Created By |
|---|---|---|---|---|---|
| Example Investment BY2010 | 2 | Edit | | 12/3/2008 10:49:45 AM | eCPIC, End User |
| Example Investment BY2010 | 1 | View | Revision 2 | 12/3/2008 10:48:23 AM | eCPIC, End User |
| Example Investment BY2010 | 0 | View | Revision 1 | 12/3/2008 10:13:10 AM | eCPIC, End User |

Page 1 of 1 Show 10 results per page

## 4.8 Delete Investment

Once an investment has been deleted, the System Administrator is the only one that can retrieve the investment. The System Administrator has the ability to place the deleted investment back into the list of 'active' investments.
To Delete an Investment:

1. Click the **Investments** module.
2. Select the **Investment Name** to be deleted.
3. From within the investment, click on the **Delete** icon ( ).
4. Confirm that this version of the investment is to be deleted. Select **OK**.




Upon confirmation, users will be redirected to the Investments module.

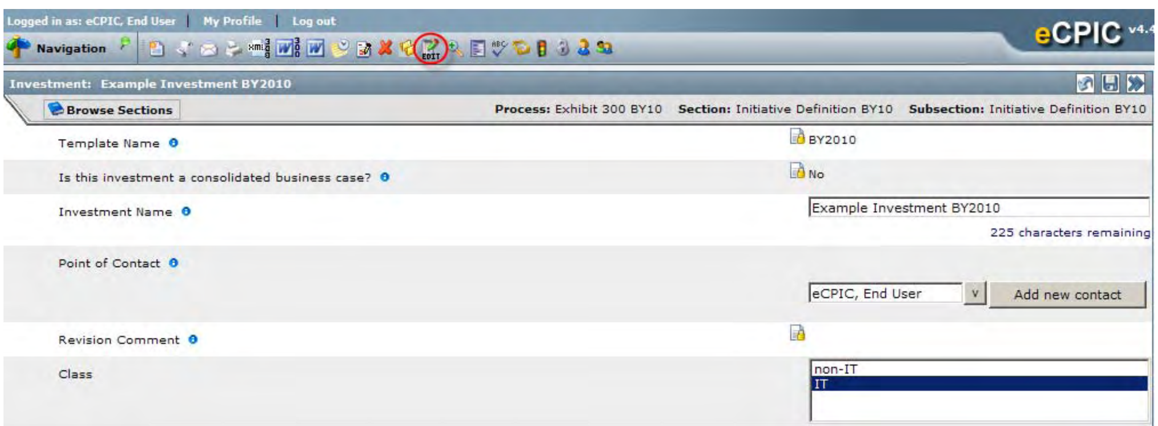
**Note: If an investment is part of a portfolio and/or an OMB submission package, then it cannot be deleted until they remove it from its associations.**

## *4.9 Edit/View Mode Toggle*

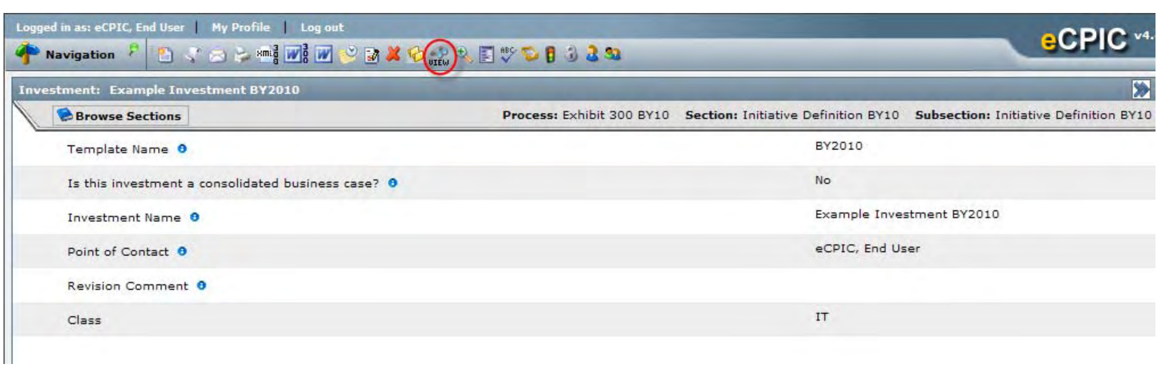
From within an investment, those users who have 'Update' access can toggle between viewing the data with all of its data entry fields activated so that they can be edited, or they can view the data so that all of its data entry fields are inactive and cannot be edited. This is useful for people who are interested in reviewing the contents of an investment without making updates to it.

The Edit/View icon is an indicator. When the investment is in 'View' mode, the icon will read 'View' and the text will not be editable. When the investment is in 'Edit' mode, the icon will read 'Edit' and the text will be editable.

1. From within the investment, the 'Edit' mode will show if users have 'Update' PERMISSIONS for the investment or 'Update' RIGHTS to the Investment module. Click on the **Edit** icon ().




The view will now change to 'View' mode.




2. Click on the **View** icon ().

The view will now change back to 'Edit' mode.

## *4.10 Zoom*

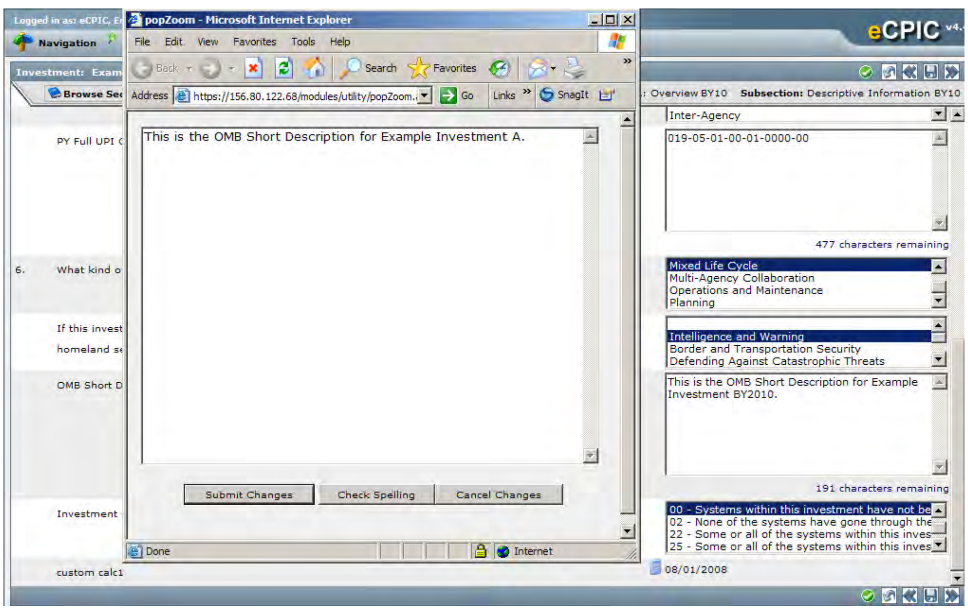
The **Zoom** icon allows users to zoom into a textbox or text area while they enter data. This means that users can work within a larger amount of space and view more of the text they have entered as they work with it.

| |
|---|
| **Note: This Zoom function will not work within Rich Text Areas.** |

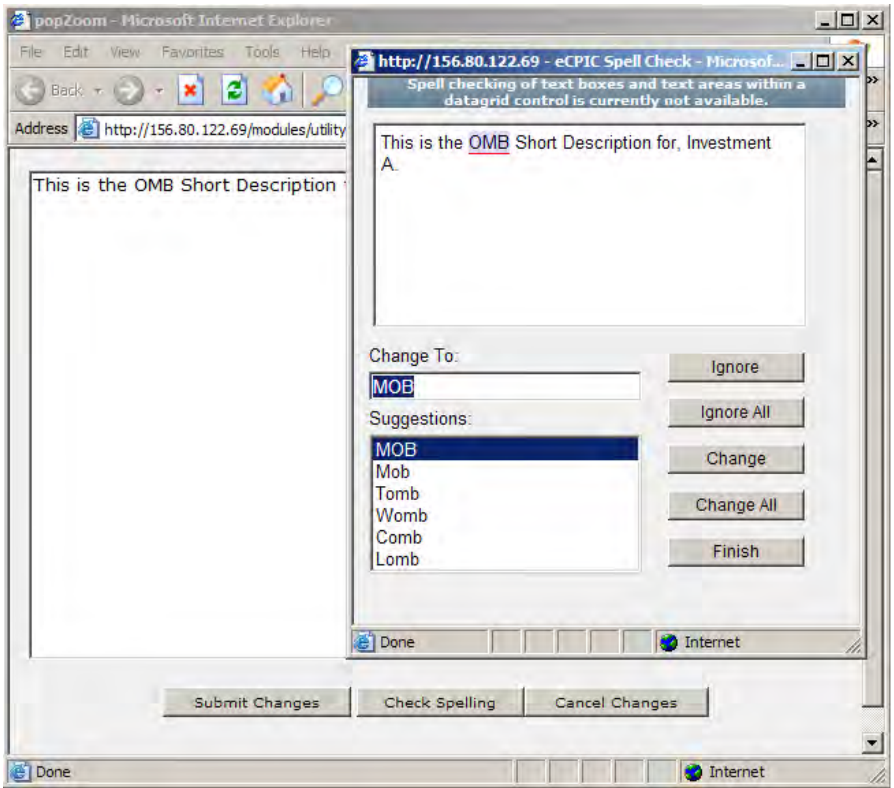
1. Place the cursor inside a textbox or text area of an investment.

2. Click on the **Zoom** icon ().

A pop-up window will appear in a larger view. The size of the window can be adjusted if necessary.




3. Enter or edit text as appropriate within the enlarged text area. Users can spell check the text entered by clicking the **Check Spelling** button.




4. When edits have been made and spell checking is complete, click the **Submit Changes** button to save the new or modified text.

## *4.11 Financial trend analysis*

The Financial Trend Analysis tool allows for trending analysis of financial data points from different revisions of a particular investment within eCPIC. This type of data trend analysis adds additional line of sight to investment changes over time and allows for better decision making at the executive level based upon spending, funding, and human capital trends captured in the eCPIC application. eCPIC provides financial trend analysis capability for the Summary of Spending (SOS) table, the Funding Sources (FS) table, the Full Time Equivalents (FTE) table, and the Quantitative Benefits (QB) table.

### 4.11.1 Opening the Financial Trend Analysis Tool

To open the Financial Trend Analysis Tool:

1. From within an investment, click the (  ) **Financial Trend Analysis** icon in the menu bar. The Financial Trend Analyzer page will display