1. INTRODUCTION

The eCPIC User Guide is compiled for the general eCPIC user. It is designed to document how to use the eCPIC application in its entirety. eCPIC has several modules (*Home, Investments, Portfolios, Resources, Scoring, and OMB Submissions*). The User Guide will demonstrate how to use the different features and functionalities in each module. For each new release, the guide is updated to reflect any additional features and/or modifications.

1.1 Overview

The Electronic Capital Planning and Investment Control System (eCPIC) is a government owned technology system (GOTS) that was created in 2003. It is installed on an Agency's intranet to manage and control their initiatives, portfolios, investment priorities and help prepare, budget and submit required reporting to the Office of Management and Budget (OMB).

1.2 Accessing eCPIC

In order to access eCPIC, each Agency has a URL site provided by their eCPIC System Administrator.

1.3 Navigation

To assist with managing an investment or portfolio, the eCPIC user interface provides streamlined navigation that allows users to travel anywhere in the application with a few clicks of the mouse.

1.3.1 eCPIC Panel Navigation

The eCPIC application implements a user-friendly navigation system via a navigation panel located on the left-hand side of the screen. The module navigation components are contained within a collapsible, accordion-style navigation panel to allow for additional viewing space when working within eCPIC. Users will have the ability to "pin and unpin" the navigation panel to allow for additional screen real estate. The navigation panel will allow for quick access to many common tasks within each eCPIC. Each module, with the exception of the Admin module will contain a type-ahead dropdown box that allows users to quickly access specific items such as investments, portfolios, reports, etc.

To open the navigation panel, mouse over the navigation icon located on the eCPIC toolbar.

1.3.1.1 Pinning/Unpinning the Navigation Panel

To provide users with the option of maximizing real estate versus immediate access to the controls located within the navigation panel, eCPIC users now have the ability to pin down the panel so that in can be viewed alongside with the content displayed in the interface. When the panel has been pinned, it will continue to be visible after the user moves the mouse off of the Navigation icon. In this manner, the content will shift to the right of the Navigation Pane and both the pane and the content will be visible. If the Navigation Pane is unpinned, it will only be visible when the user hovers the mouse over the Navigation icon, and the pane will display on top of the page content. In order to pin or unpin the navigation panel:

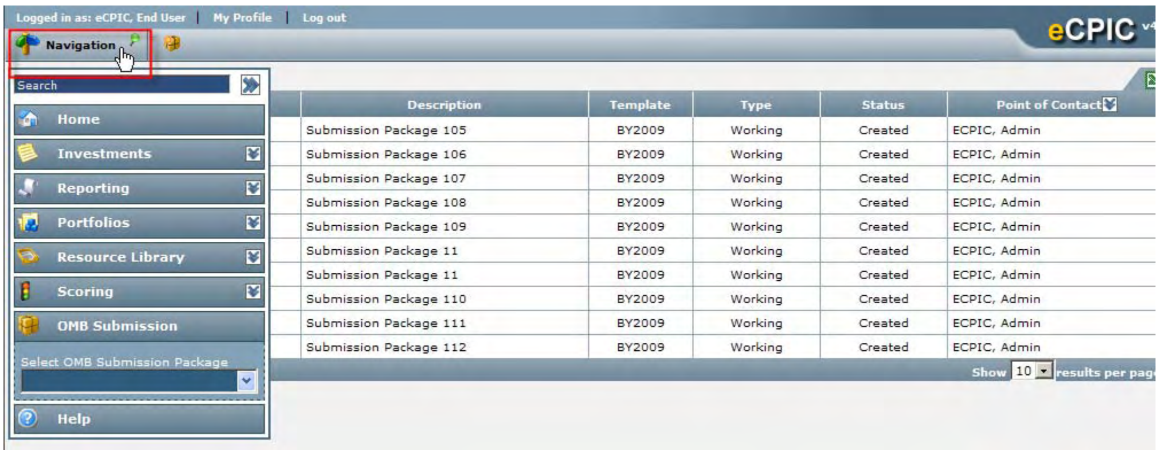
1. Mouse over the Navigation (Navigation) icon to expand the navigation panel
2. Click on the Pin ( ) icon within the Navigation drop down list
3. Once the navigation panel has been pinned, the contents of the page will be shifted over to the right. Additionally, the Pin icon will change to a pinned state ( ).
4. Click on the Pin ( ) icon again to unpin and hide the navigation pane

Note: The pinned or unpinned status is maintained for each user as they move throughout the system. Whenever the Navigation Pane is pinned or unpinned, eCPIC will maintain that setting for the user, not only through the current session, but also after the user logs out. That means if a user pins the Navigation pane and logs out, it will be pinned the next time they log back in.

1.3.1.2 Jump to a New Investment or Portfolio

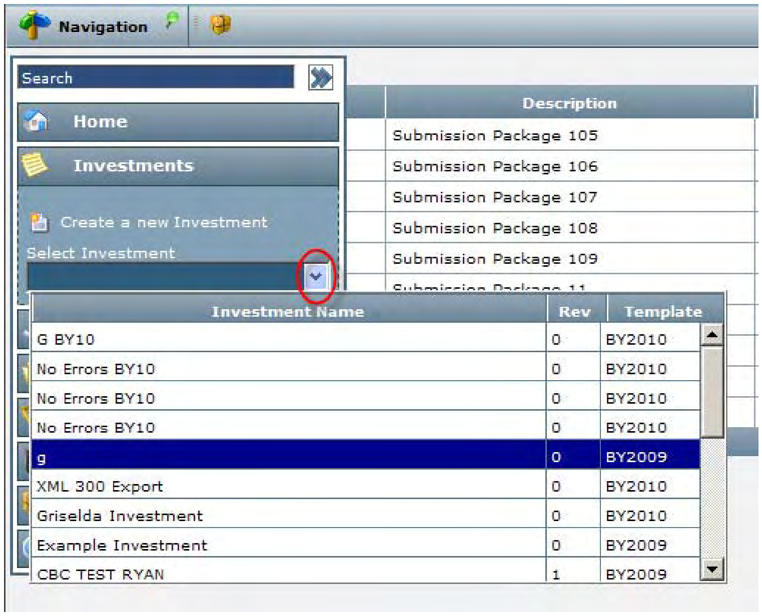
Within the Investments or the Portfolios module, users can easily jump to a different investment/portfolio at any time.

1. Click the down **Navigation Icon** drop-down to reveal the Navigation Tree



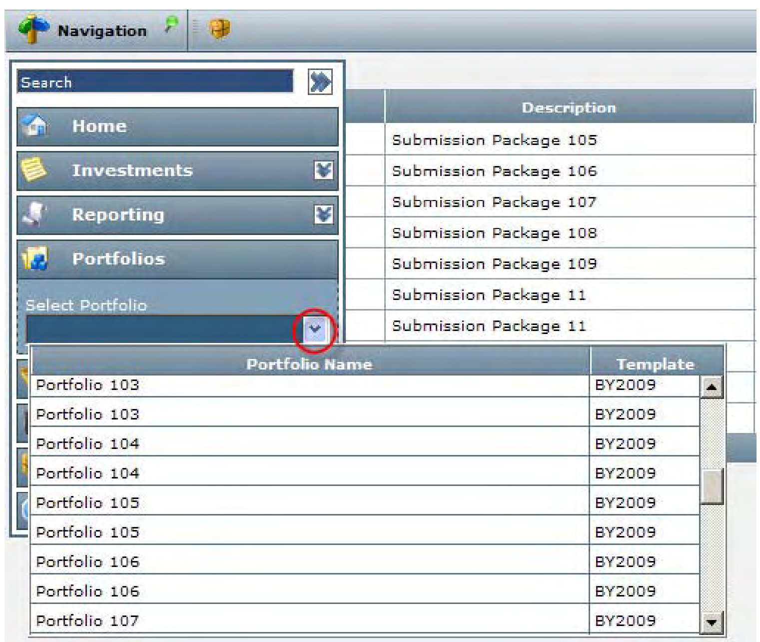
Investment List Menu

Click on the down arrow to reveal the Investments Module drop-down list



Portfolio List Menu

Click on the down arrow to reveal the Port Module drop-down list



2. Select an **Investment/Portfolio** from the drop-down.

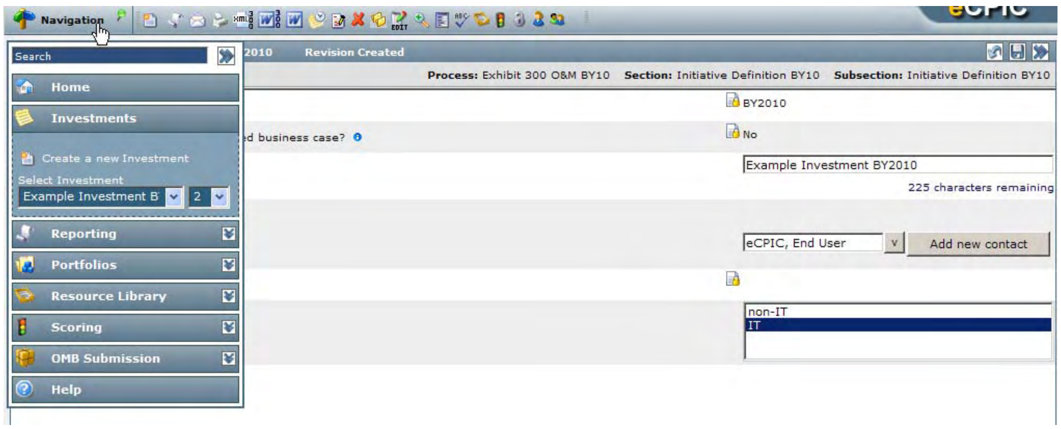
Note: When navigating to a new investment through the Investment List, users will only stay in the same Section/Sub-Section of the system if the selected investment is in the same Template. If the selected investment is not in the same template, users will be taken to the first Section/Sub-section of the default Process

in that particular Template.

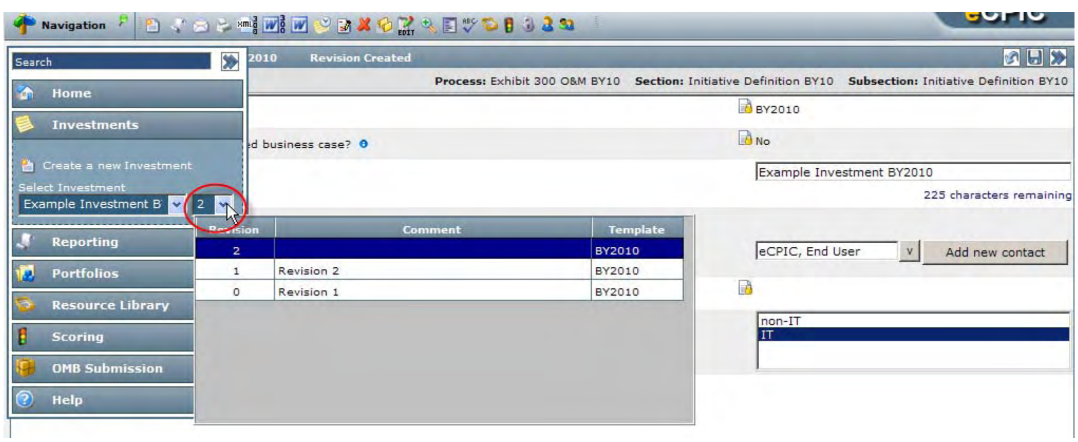
1.3.1.3 Jump to a New Investment Revision

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



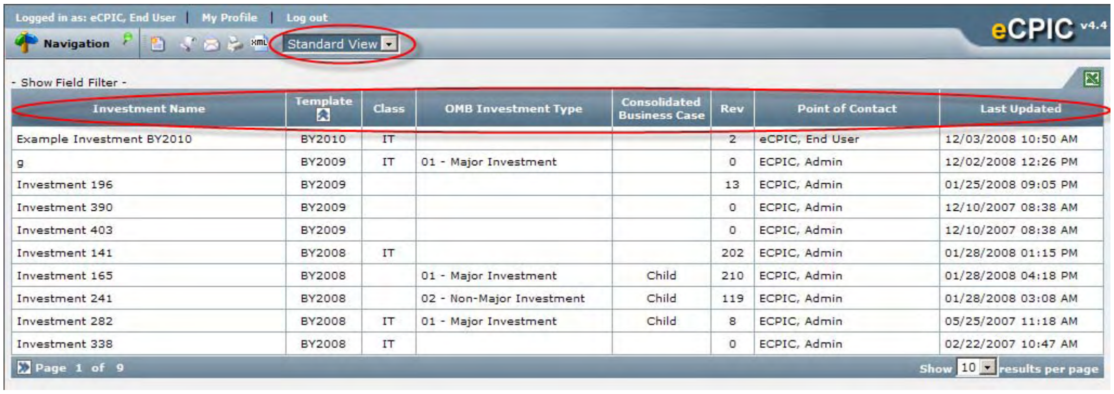
2. Click on the revision drop-down list to the right of the Select Investment drop-down list. The investment revision history list will display.



1.3.1.4 Jump to a New View

eCPIC is delivered with one default investment view that will be seen each time the Investments module is selected. It is called the **Standard View**. The columns contained within the default view include Investment Name, Template, Class, OMB Investment Type, Consolidated Business Case, Revision, Point of Contact, and Last Updated.

System Administrators have the ability to customize different views of investment data that will populate the view of the table.



Investment Name	Template	Class	OMB Investment Type	Consolidated Business Case	Rev	Point of Contact	Last Updated
Example Investment BY2010	BY2010	IT			2	eCPIC, End User	12/03/2008 10:50 AM
g	BY2009	IT	01 - Major Investment		0	ECPIC, Admin	12/02/2008 12:26 PM
Investment 196	BY2009				13	ECPIC, Admin	01/25/2008 09:05 PM
Investment 390	BY2009				0	ECPIC, Admin	12/10/2007 08:38 AM
Investment 403	BY2009				0	ECPIC, Admin	12/10/2007 08:38 AM
Investment 141	BY2008	IT			202	ECPIC, Admin	01/28/2008 01:15 PM
Investment 165	BY2008		01 - Major Investment	Child	210	ECPIC, Admin	01/28/2008 04:18 PM
Investment 241	BY2008		02 - Non-Major Investment	Child	119	ECPIC, Admin	01/28/2008 03:08 AM
Investment 282	BY2008	IT	01 - Major Investment	Child	8	ECPIC, Admin	05/25/2007 11:18 AM
Investment 338	BY2008	IT			0	ECPIC, Admin	02/22/2007 10:47 AM

Within the Investments module, the columns containing the set of data entry fields that will appear can be changed.

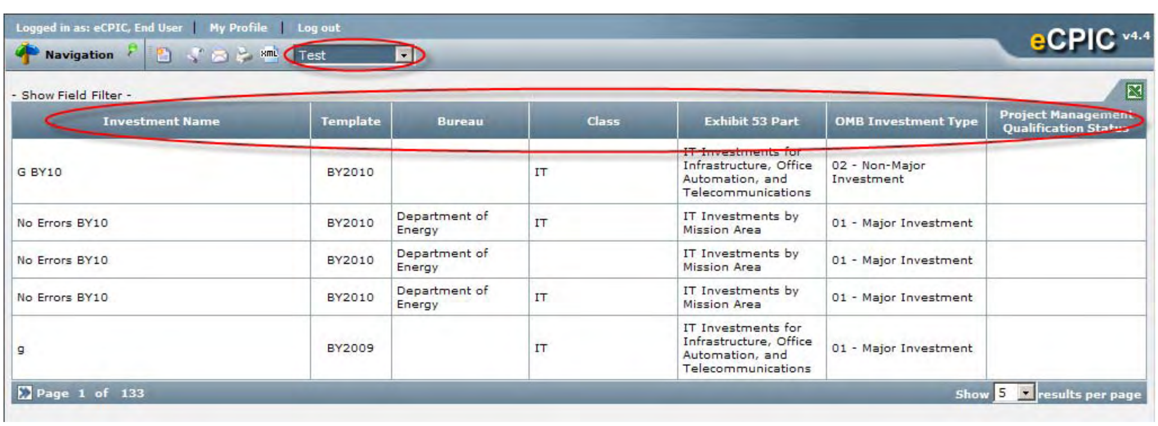
1. Click the down arrow on the **View** drop-down to reveal custom views that have been created in the eCPIC application. *('Views' are created by the System Administrator*).

View List Menu

Investment Name	Template	Class	OMB Investment Type	Consolidated Business Case	Rev	Point of Contact	Last Updated
Example Investment BY2010	BY2010	IT			2	eCPIC, End User	12/03/2008 10:50 AM
g	BY2009	IT	01 - Major Investment		0	ECPIC, Admin	12/02/2008 12:26 PM
Investment 196	BY2009				13	ECPIC, Admin	01/25/2008 09:05 PM
Investment 390	BY2009				0	ECPIC, Admin	12/10/2007 08:38 AM
Investment 403	BY2009				0	ECPIC, Admin	12/10/2007 08:38 AM

2. Select a new **View** from the drop-down.

The screen will refresh to display a new view of fields.



Investment Name	Template	Bureau	Class	Exhibit 53 Part	OMB Investment Type	Project Management Qualification Status
G BY10	BY2010		IT	IT Investments for Infrastructure, Office Automation, and Telecommunications	02 - Non-Major Investment	
No Errors BY10	BY2010	Department of Energy	IT	IT Investments by Mission Area	01 - Major Investment	
No Errors BY10	BY2010	Department of Energy		IT Investments by Mission Area	01 - Major Investment	
No Errors BY10	BY2010	Department of Energy	IT	IT Investments by Mission Area	01 - Major Investment	
g	BY2009		IT	IT Investments for Infrastructure, Office Automation, and Telecommunications	01 - Major Investment	

Note: The results can be sorted by clicking on the column header. This will sort the results in ascending order. An arrow will appear next to the header indicating the column that is being sorted. Click on the arrow or heading again and the results will be sorted in descending order.

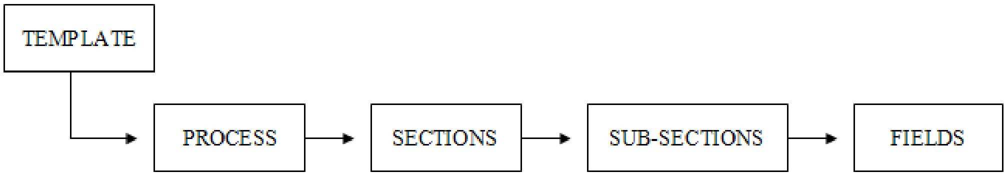
1.3.2 Investments Module Process Browser

eCPIC is delivered to an Agency with one Template called, IT Investment BY#### (*the Budget year*). For each new budget year, a new Template is added. The Template delivered cannot be edited or deleted; nor can agencies create their own Templates.

Each Template contains a default Process which contains all of the necessary OMB Exhibit 300 fields needed for the Budget Year. The fields are separated by Sections and Sub-Sections according to the Circular A-11 Guidance distributed by OMB

TEMPLATE	DEFAULT PROCESS
IT Investment BY2005	Full Business Case
IT Investment BY2006	Full Business Case
IT Investment BY2007	Exhibit 300 BY07
IT Investment BY2008	Exhibit 300 BY08 (*Includes Parts I, II, III, and IV of A-11*)
	Exhibit 300 DME BY08 (*Includes Parts I and II of A-11*)
	Exhibit 300 O&M BY08 (*Includes Parts I and III of A-11*)
	Exhibit 300 E-Gov BY08 (*Includes Parts I and IV of A-11*)
	Exhibit 300 Non-IT BY08 (*Includes Part I of A-11*)
	Exhibit 53 BY08 (*Includes Exhibit 53 of A-11 Section 53*)
IT Investment BY2009	Exhibit 300 BY09 (*Includes Parts I, II, III, and IV of A-11*)
	Exhibit 300 DME/Mixed BY09 (*Includes Parts I and II of A-11*)
	Exhibit 300 O&M BY09 (*Includes Parts I and III of A-11*)
	Exhibit 300 E-Gov BY09 (*Includes Parts I and IV of A-11*)
	Exhibit 300 Non-IT BY09 (*Includes Part I of A-11*)
	Exhibit 53 BY09 (*Includes Exhibit 53 of A-11 Section 53*)
IT Investment BY2010	Exhibit 300 BY10 (*Includes Parts I, II, III, and IV of A-11*)
	Exhibit 300 DME/Mixed BY10 (*Includes Parts I and II of A-11*)
	Exhibit 300 O&M BY10 (*Includes Parts I and III of A-11*)
	Exhibit 300 E-Gov BY10 (*Includes Parts I and IV of A-11*)
	Exhibit 300 Non-IT BY10 (*Includes Part I of A-11*)
	Exhibit 53 BY10 (*Includes Exhibit 53 of A-11 Section 53*)

When users create an investment (*business case*), they must associate it with a Template in order to access a Process. From within the Process, users can update and track the investment throughout its life cycle. An Agency has the capability to create custom designed Processes, Sections, Sub-Sections, and Fields.

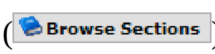


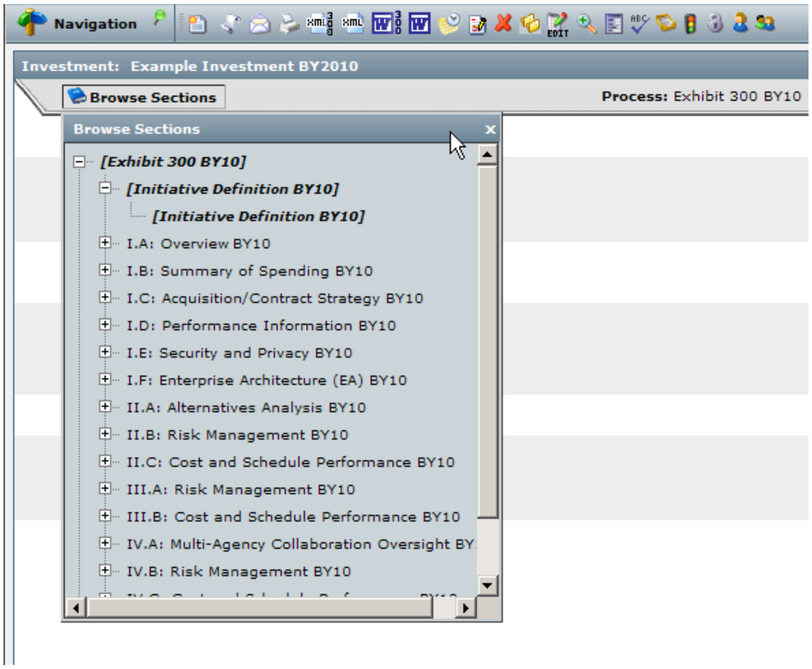
To assist the user in easily navigating to different investments, processes, sections, etc. – hierarchical drop-down lists have been incorporated into eCPIC's navigation. These drop-down lists display the various options available within a module. By selecting one of the choices (*investment, revision number, process, section, sub-section, etc*.) users will "jump" to that area of the application.

Note: Some drop-downs are populated based on selections from associated drop-downs. For these drop-downs, be sure to wait until the screen reloads before making a selection. The application needs time to populate the appropriate choices based on the selection made.

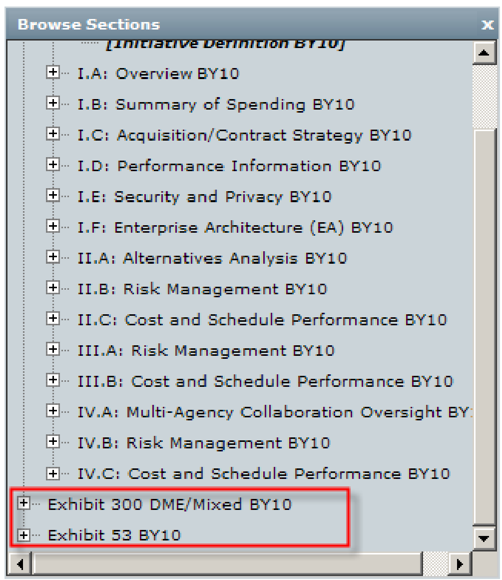
When viewing an investment, users have the ability to open a process browser to navigate through processes, sections, and sub-sections that they have been provided permission to access. These processes are configured and managed by the eCPIC System Administrator. When an individual field is configured to exist within multiple processes, the data for that field only needs to be input once in order for the field to be populated. Data is shared across every Process that uses the same Fields

In order to navigate between eCPIC processes, sections, or subsections within the current investment:

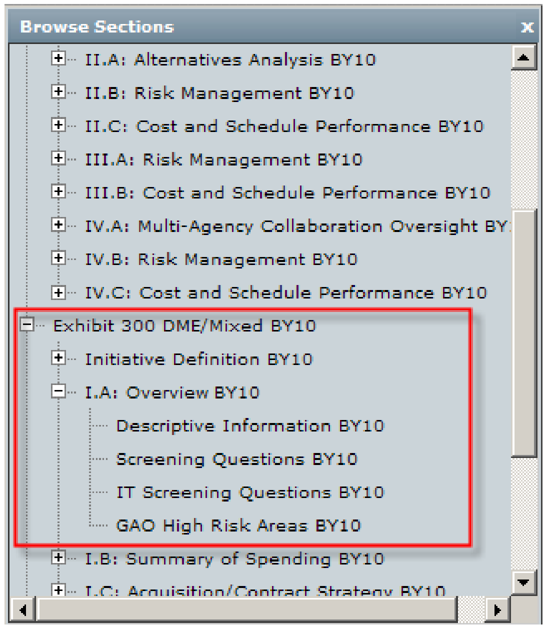
1. Click on the browse section (
) icon to open the process browser. The list of available processes will be displayed below in a tree format



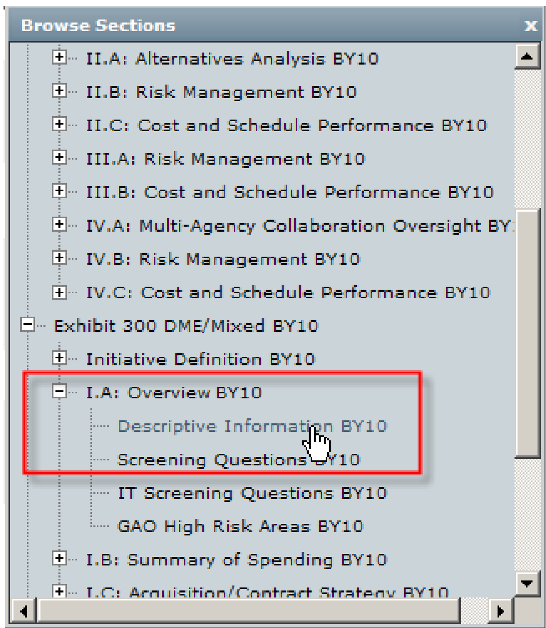
2. A list of available process will be displayed



3. Click on the (⊞) icon to expand a process and view the sections under that process. Likewise, clicking on the (⊞) for each section will display all of the subsections under that section.



4. To navigate to a process, section, or sub-section click on the name

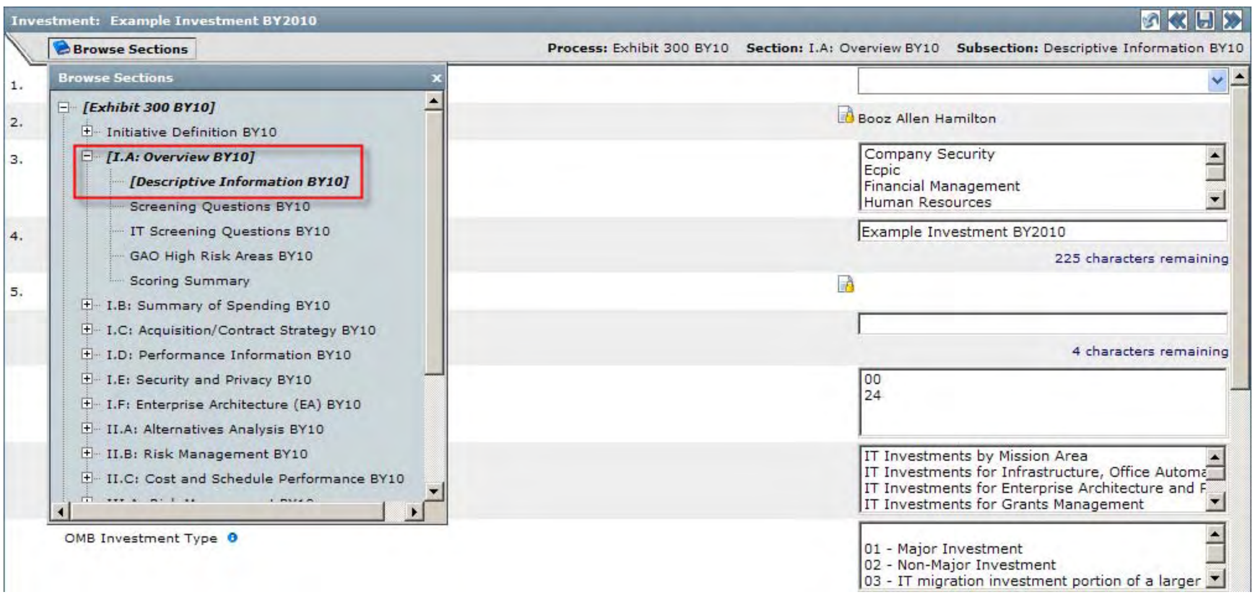


5. Click on the () icon to close the process browser panel without navigating away from the current location

Note: When changes have been made to a workflow, the changes will not be displayed within the process browser window until the user logs out and logs back in.

1.3.2.1 Currently Displayed Section

When navigating through an investment, the current section and sub-section will be displayed at the top of the investment. This will ensure that the user can easily view which process, section and sub-section that they are currently in. When the process browser panel window is open, the current displayed section and sub-section will also be highlighted.



1.3.3 Toolbars

A toolbar is conveniently located on every screen, presenting icons that allow users to perform common functions with ease. Icons lead to important functionality such as creating revisions, viewing and downloading resource library items, toggling to edit mode, toggling to inline scoring, as well as special features like spell check, text zoom, and print services. The toolbars used throughout the application provide easy access to common functions and are customized to accommodate the specific functions available within each module. Rolling over each icon with the mouse will reveal the function of that icon.

The table below displays the icons used throughout the eCPIC application. Next to each icon is a brief description of its function.

Navigation	Navigation Tree		Navigation Pin
	Add New Investment		Compose and Send E-Mail
	Print Screen		Export Exhibit 300 to XML
	Full Export to XML		Export Exhibit 300 to Word
	Export to Word		Manage Umbrella (View/Select Sub-Investments
	Create Investment Revision		Delete Item
	Investment in Edit Mode – View Toggle		Investment in View Mode – Edit Toggle
	Zoom into Text Area Form Field		Review Investment
	Spell Check Contents of Text Area		Toggle Resource List
	Investment Locked - Unlock Toggle		Investment Unlocked - Lock Toggle
	Assign User Permissions		Assign Group Permissions
	Edit General Information		Graphs
	Back		Generate Exhibit 53
	Undo		Next/Run
	Cancel		Save
	Export Data Grid to Excel		Export to MS Project
	Delete Item	xml	Validate and Export XML
	Report List		Add Report
	Toggle Scoring Pane/Scored Fields	508	508 access to Inline Scoring or the Resource Library
	Generate Graph/Report		Run
	Home Module		Investments Module
	Portfolios Module		Resources Module
	Scoring Module		OMB Submissions Module
	Help Module		Fit to screen
	Rearrange Data Web		Run Relationship Mapper
	Read Only Field		Calculated Field
<<	First Page	>>	Last Page
<	Previous Page	>	Next Page
1 2 3 4 5 6 7	Numerical Page	A B C D E F G H	Alphabetical Page
	View Chart Key		Save Default Dashboard for all Portfolios and Users
	Add New Chart		Display Investment Financial Totals and Balance Table

	New OMB Submission		Portfolio Copy
	Add New Portfolio		Edit Portfolio
	Investment History		Initiate a new Change Request
	Open Performance Baseline Change Request		Approve and Close the Change Request
	Submit Change Request for Approval		Locked Milestone Column
	Deny the Change Request and set to “In Progress” for modification.	Browse Sections	Browse Sections
	Data Grid Expand Down		Portfolio Dashboard
	Select Portfolios		Select Investments
	Charts		Reports
	XML Validation and Generation		Scoresheets
	Scorecard Fields		Authoritative Record
	Scorecard Dashboard		Investments Membership
	Financial Trend Analysis		

The icons that are available on the toolbar depend upon several things, including the module being accessed and the rights and/or permissions that users have. Additionally, when in an investment, it is possible that another user may have reserved the investment by locking it. In this case, the investment will appear in ‘view’ mode and will not be editable and certain icons will not be accessible for that investment. More details follow in the *Lock and Unlock* sections of this user guide.

The following are examples of what a user with ‘Full’ RIGHTS for all modules (excluding Admin rights) would see once within an Investment, Portfolio, Resource, Scoresheet, and/or OMB Submission Package:

Investments Toolbar

Portfolios Toolbar

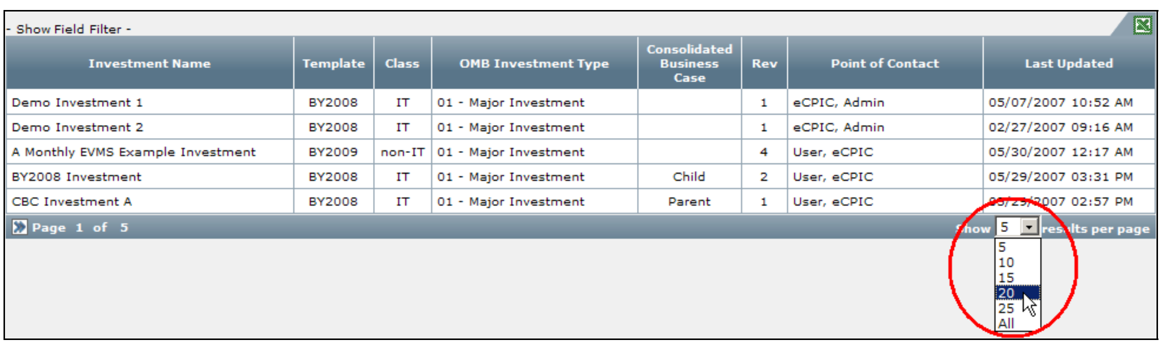
Resources Toolbar

Scoring Toolbar

OMB Submission Toolbar

1.3.4 Tabular Paging

Wherever lists are displayed in a tabular format, users can specify the number of items they prefer to see per screen by using the "**Show x Results per Page**" drop-down. Selecting 'All' will show all options listed. Once set, this setting will be maintained throughout the tables in the application for the entire session.



- Show Field Filter -

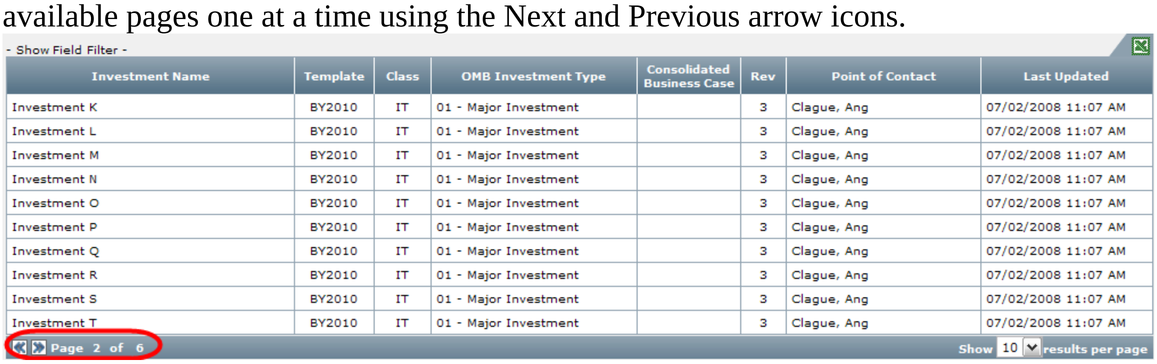
Investment Name	Template	Class	OMB Investment Type	Consolidated Business Case	Rev	Point of Contact	Last Updated
Demo Investment 1	BY2008	IT	01 - Major Investment		1	eCPIC, Admin	05/07/2007 10:52 AM
Demo Investment 2	BY2008	IT	01 - Major Investment		1	eCPIC, Admin	02/27/2007 09:16 AM
A Monthly EVMS Example Investment	BY2009	non-IT	01 - Major Investment		4	User, eCPIC	05/30/2007 12:17 AM
BY2008 Investment	BY2008	IT	01 - Major Investment	Child	2	User, eCPIC	05/29/2007 03:31 PM
CBC Investment A	BY2008	IT	01 - Major Investment	Parent	1	User, eCPIC	05/29/2007 02:57 PM

Page 1 of 5 Show 5 results per page

5
10
15
20
25
All

1.3.4.1 Standard Paging

When users view tabular data, the standard paging style allows users to step through the available pages one at a time using the Next and Previous arrow icons.



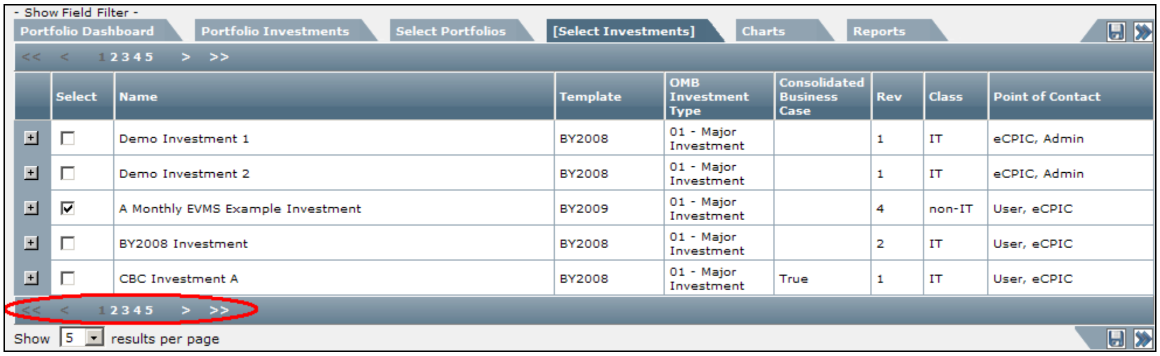
- Show Field Filter -

Investment Name	Template	Class	OMB Investment Type	Consolidated Business Case	Rev	Point of Contact	Last Updated
Investment K	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment L	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment M	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment N	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment O	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment P	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment Q	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment R	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment S	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM
Investment T	BY2010	IT	01 - Major Investment		3	Clague, Ang	07/02/2008 11:07 AM

Page 2 of 6 Show 10 results per page

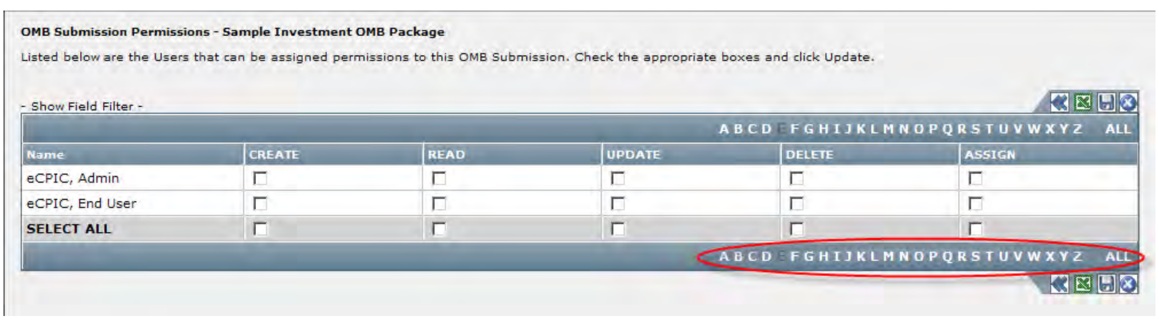
1.3.4.2 Numerical Paging

When users are in the Portfolio and OMB Submission modules, they will be able to navigate through page numbering to jump to different pages to select investments.



1.3.4.3 Alphabetical Paging

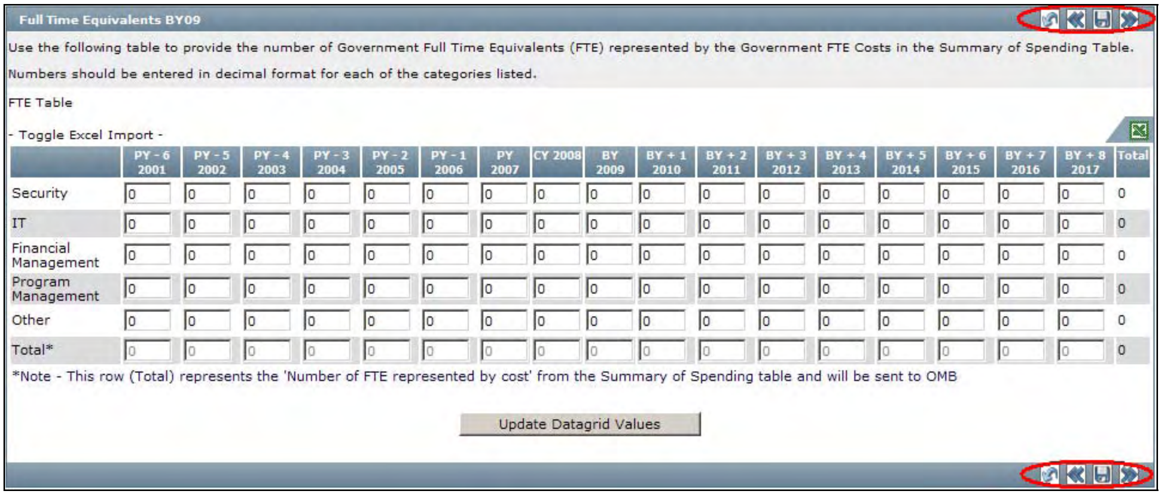
When assigning user and group permissions to Investments, Portfolios, Scoresheets, OMB Submission Packages, users will be able to browse the user and group list alphabetically. To view a list of particular users select the appropriate letter from the table navigation bar.



Note: When navigating to a table using alphabetical paging it will always default to the letter 'A'. If there are no users or groups starting with 'A' the table will appear empty. To view a list of users or groups, select an appropriate letter to find existing users.

1.3.5 Investments Module Navigation

When in an investment module, there is a **Next** and **Back** arrow icon, an **Undo** icon, and a **Save** icon to assist in moving through pages.



Full Time Equivalents BY09

Use the following table to provide the number of Government Full Time Equivalents (FTE) represented by the Government FTE Costs in the Summary of Spending Table.

Numbers should be entered in decimal format for each of the categories listed.

FTE Table

- Toggle Excel Import -

	PY - 6 2001	PY - 5 2002	PY - 4 2003	PY - 3 2004	PY - 2 2005	PY - 1 2006	PY 2007	CY 2008	BY 2009	BY + 1 2010	BY + 2 2011	BY + 3 2012	BY + 4 2013	BY + 5 2014	BY + 6 2015	BY + 7 2016	BY + 8 2017	Total
Security	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
IT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Financial Management	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Program Management	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total*	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

*Note - This row (Total) represents the 'Number of FTE represented by cost' from the Summary of Spending table and will be sent to OMB

Update Datagrid Values

Next and **Back** arrows: moves pages forward or backwards while saving information.

Undo icon: will reset the data back to what it was before it was last saved or navigated away from the page.

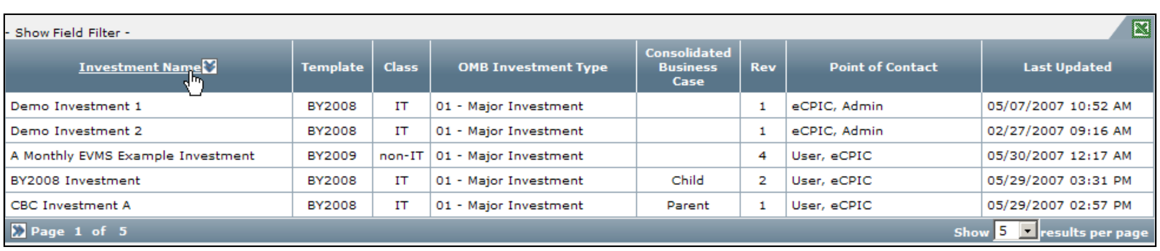
Save icon: will save data entered and refresh the same screen.

1.3.6 Sorting

Wherever data is displayed in a tabular format, it can be sorted by clicking the column header.

For example, users may prefer to sort investments by *Investment Name*:

1. Click on the **Investment Name** header. An arrow will appear next to the header.

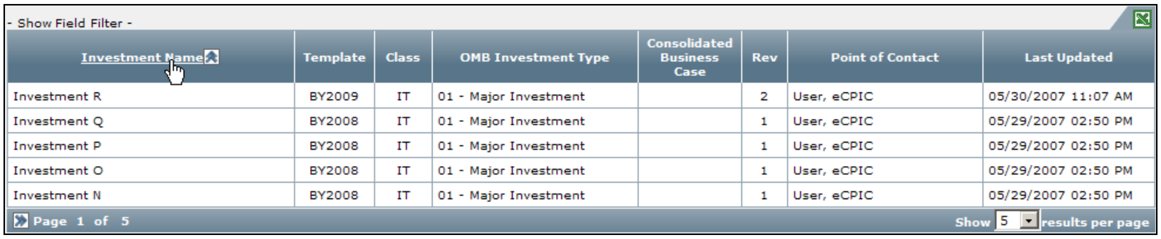


- Show Field Filter -

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	02/27/2007 09:16 AM
A Monthly EVMS Example Investment	BY2009	non-IT	01 - Major Investment		4	User, eCPIC	05/30/2007 12:17 AM
BY2008 Investment	BY2008	IT	01 - Major Investment	Child	2	User, eCPIC	05/29/2007 03:31 PM
CBC Investment A	BY2008	IT	01 - Major Investment	Parent	1	User, eCPIC	05/29/2007 02:57 PM

Page 1 of 5 Show 5 results per page

2. Click the same column heading again to sort the data in descending order.



- Show Field Filter -

Investment Name	Template	Class	OMB Investment Type	Consolidated Business Case	Rev	Point of Contact	Last Updated
Investment R	BY2009	IT	01 - Major Investment		2	User, eCPIC	05/30/2007 11:07 AM
Investment Q	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/29/2007 02:50 PM
Investment P	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/29/2007 02:50 PM
Investment O	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/29/2007 02:50 PM
Investment N	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/29/2007 02:50 PM

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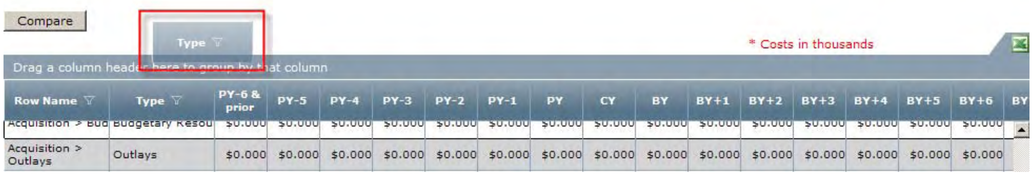
1.3.7 Grouping Column Headers and Row Filters

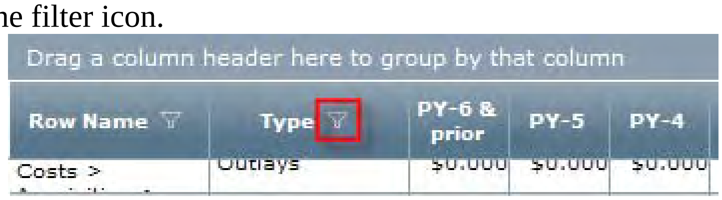
When accessing certain tables within eCPIC, users can select which columns they would like to display within a table and then sort on those results as needed.

1. Drag any column header into the space marked **Drag column header here** to group the table by that particular column header



2. When a table has been grouped by a particular column header, click the ( ) **sort** icon next to the column header name to alternate between an ascending and a descending sort

3. Click the ( ) **filter** icon next to a column header name to open the filter window for that column. Selecting one of the options in the filter window will filter the table accordingly. Only column headers with useful filtering functionality will display the filter icon.



1.3.8 Search

Users can use the **Search** function from anywhere within eCPIC to find Investments, Portfolios, Scoresheets, Resources, and OMB Submissions that contain a specific keyword in their respective names and/or descriptions.

1. Expand the Navigation Tree

2. In the Search field, type in text that relates to the item being looked for.