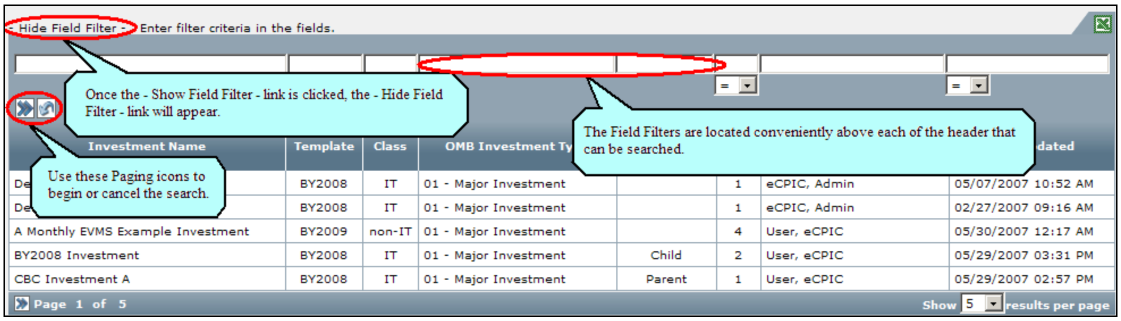
1. Click the **Show Field Filter** link.

This displays the filtering criteria available dependent upon what is being searched. Some types of criteria are Investment Name, Template, Class, OMB Investment Type, Revision, etc.

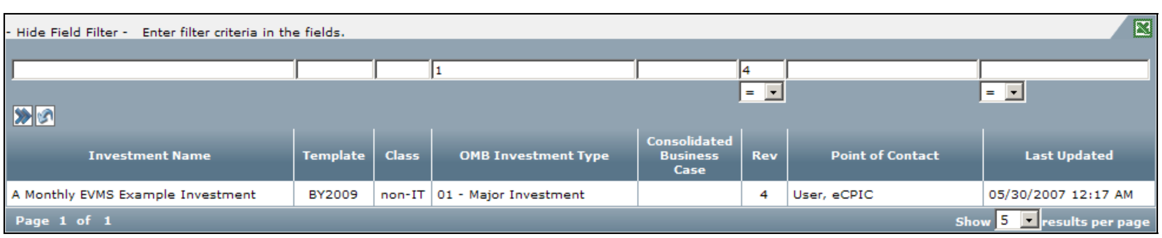
2. Enter the value(s) into the fields that will be searched.



For example, if searching for an investment that is a 01-Major Investment and has three Revisions, enter that information in the field filters that are located above those columns. The (=) sign can be used when specifying how many revisions the item contains.

Note: The filters are not case sensitive. Some filters (i.e. number and date fields) will allow users to select the type of search including an *equal to* (=), *greater than* (>), or *less than* (<) statement. Other filters (i.e. text fields) only allow text searches (i.e. *LIKE* clause).

3. Click the **Next** icon to proceed with the search. The page will refresh displaying the results matching the filtering criteria selected. To undo the selected filtering, click the **Undo** icon ( ). The page will refresh with the investments that match the data entered.



1.4 *eCPIC System Features*

eCPIC contains numerous features to assist in managing the application.

1.4.1 Status Mode

Users with System Administrative RIGHTS can set the application to an **INACTIVE MODE**. When the application has been put in an 'INACTIVE MODE', users will be able 'view' investments, however, users will not be able to 'edit' or add any data. No data will be saved.

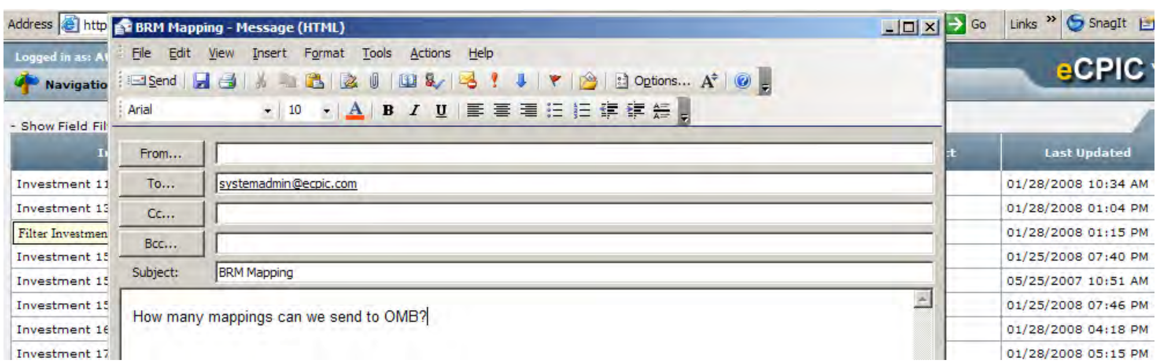
The system will show a message to all users on the top of every screen in eCPIC stating that the system is in "**INACTIVE MODE**".

1.4.2 System Emails

From within the Investments, Portfolios, and Scoring modules, clicking on the Email icon ( ) will open the email application that is designed as the local machine's default mail application, and allow users to compose a message.

1. Click on the **Email** icon ( ).

The users default email application will run and users will be able to compose and send a message without ever navigating away from where they were in the application.



2. Enter the Subject and content of the message.

3. From within the message window, click **Send**.

1.4.3 Printing in eCPIC

eCPIC offers two ways to print an entire investment. An investment can print from a pop-up HTML (*Hypertext Markup Language*) window, or from an exported Microsoft Word document.

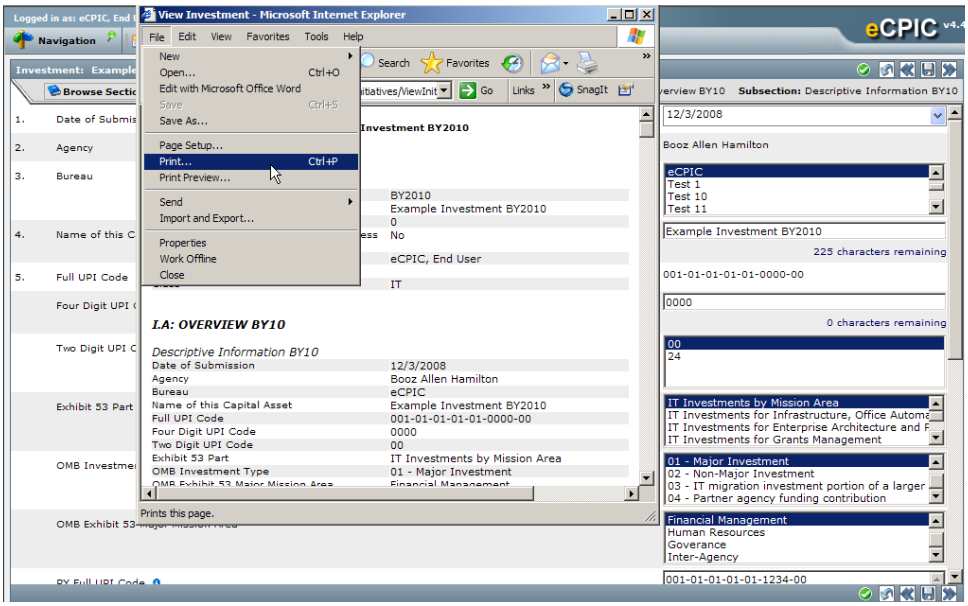
1.4.3.1 Print from HTML

From within an investment:

1. Click on the **Print** icon ( ). The investment will appear in a new window.

2. From within the new window, click **File.**

3. Select **Print** to send the contents of that window to a printer.



To maintain the legibility when printing the investment in its entirety, be sure the browser supports printing alternating row shading. This can be verified by opening the browser and selecting the options for background color images contained within the file.

1.4.3.2 Print from MS Word

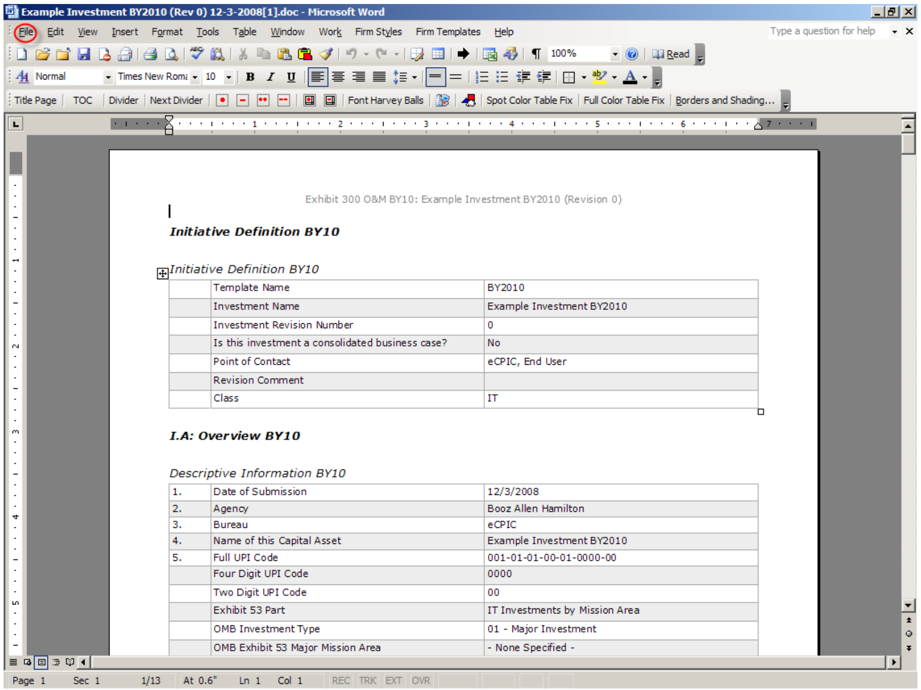
An alternate to printing directly from the browser is to export and print contents in MS Word. When exporting an investment business case from eCPIC to Word or Word 300, the file will be generated as a Microsoft Word Document. This will provide extended formatting capabilities to the document such as allowing all tables and text to fit to page without having the user manually adjust those fields. It will also provide the ability for additional Microsoft Word Features, such as Page Numbers, automatic headers and footers. eCPIC offers two options for this function.

1.4.3.2.1 Export to Word

The ‘Export to Word’ option allows exporting the investment with the fields as they are seen on the screen. *It will export all data, including agency-defined fields.*

1. From within an investment, click on the **Word** icon ( ).

The investment will appear in a new window:



2. From within the new window, click **File**.

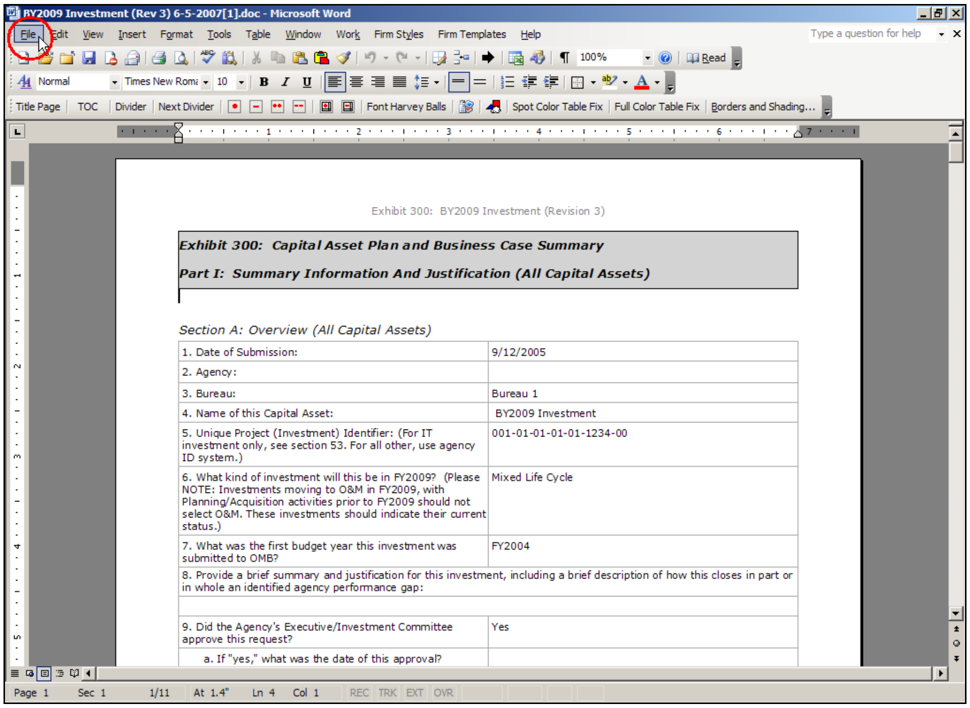
3. Select **Print**.

1.4.3.2.2 Export to Word 300

The 'Export to Word 300' option exports the investment into a Word document formatted according to the A-11 Guidance. The order of the fields and questions mirrors that of the template in the A-11 and is not affected by changes or formatting made in the eCPIC workflow. *It will only export OMB fields.*

Note: The Summary of Spending table will be displayed in millions upon export according to OMB Guidance.

1. From within an investment, click on the **Word 300** icon ( ). The investment will appear in a new window:



2. From within the new window, click **File**.

3. Select **Print**.

1.4.4 Exporting data to XML

eCPIC offers users the ability to export data to XML (*Extensible Markup Language*) from the Investments and the Portfolios module. XML allows users to create their own customized tags for web documents. Tags are commands inserted into a document that specifies how the document or parts of a document should be formatted.

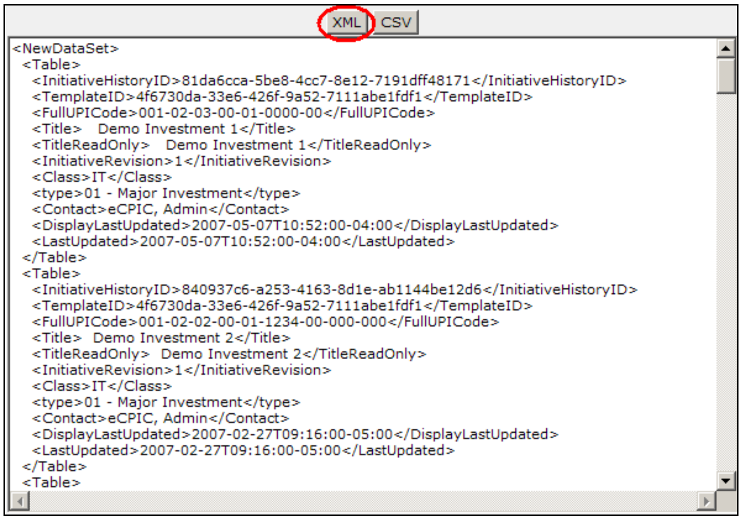
1.4.4.1 Export to XML

The XML icon is available on the Investments and Portfolios module main listing screens.

1.4.4.1.1 Export to XML from the Investments Module

1. From the Standard View page of the Investment module (*where all available investments are listed*), click on the **XML** icon ( ).

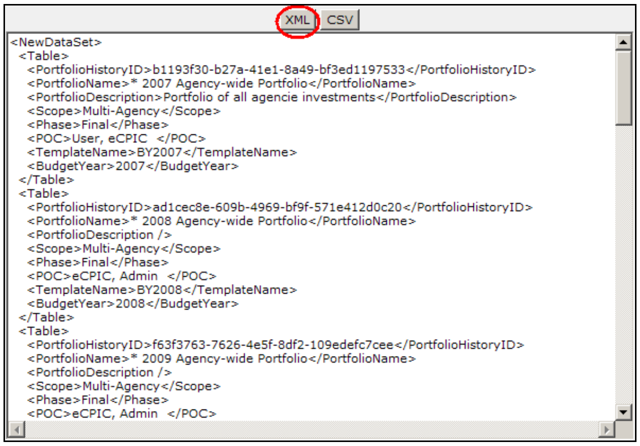
The XML will export *Initiative History* data for the investments that are listed. Types of data include the Template, Title, Agency, Full UPI Code, etc.



1.4.4.1.2 Export to XML from the Portfolios Module

1. From the Portfolios module (*where all available portfolios are listed*), click on the on the **XML** icon ( ).

The XML will export *Portfolio History* data for the portfolios that are listed. Types of data include the Template, Name, Mission Area, POC, etc.



1.4.4.2 Export to XML 300

The XML 300 icon is only available from within an investment. This will pull *required data* for the entire Exhibit 300 format (*with tags relating to the OMB defined fields*).

1. From within an Investment, click on the **XML 300** icon ( ).

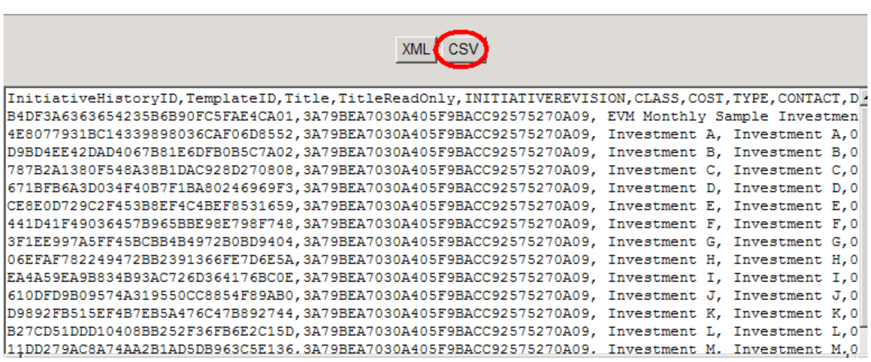
A validation check against the OMB Schema will run. If the investment passes the check, the XML 300 document will appear.

Note: For System Administrators, the XML icon ( ) is available from within an investment as well as the XML 300 icon ( ). Clicking on the XML icon ( ) will export all data (*including Agency-defined fields*). This is considered a FULL XML export. General users will only see the XML 300 icon ( ).

1.4.5 Export to Comma Separated Values (CSV)

Because most database systems allow users to import and export comma-delimited data, eCPIC offers the ability to transform XML data into **CS**V. CSV is a data format that uses a comma to separate each piece of data. Cutting and pasting this content into a text file will allow users to import into a third party tool, such as MS Excel or Word.

The CSV button is located within the pop-up window that is launched when a user chooses to export data to XML in the Standard View screen of the Investments and the Portfolios module.



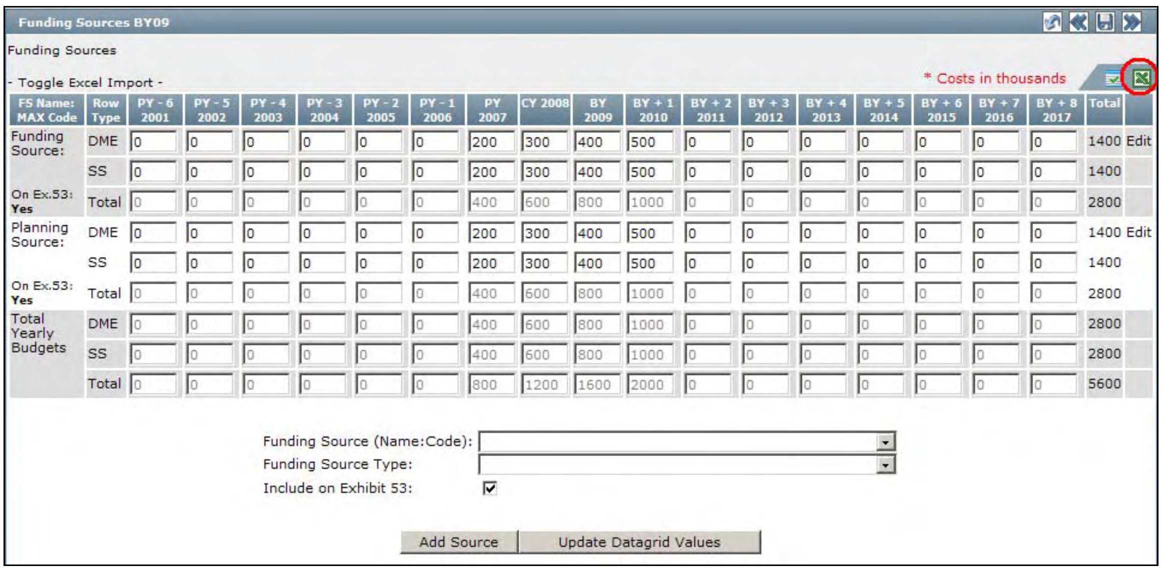
1.4.6 Excel Export and Import

Each table found in the Investments Module of the eCPIC application allows users to export data to Excel and import that data back in through the Excel spreadsheet.

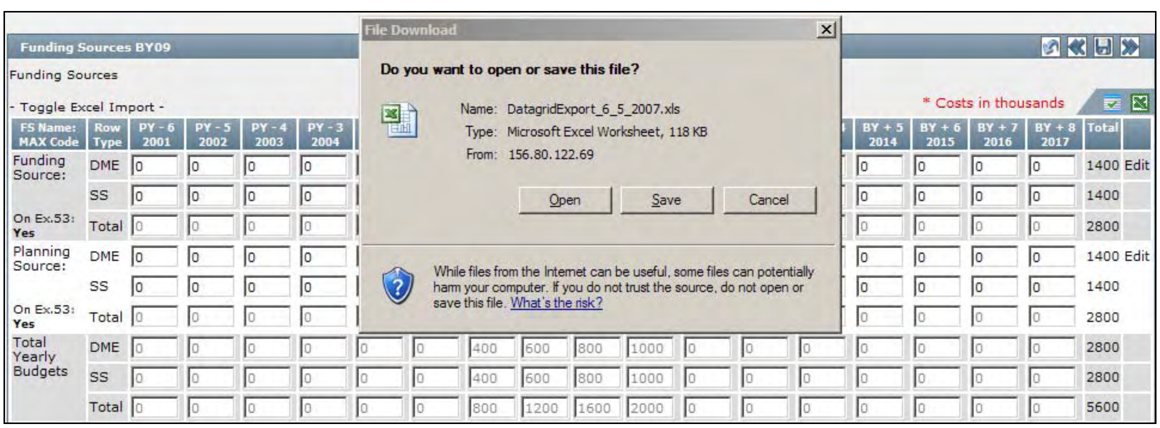
1.4.6.1 Export to Excel

To Export data to an Excel spreadsheet:

1. From within a table, click on the Excel icon to export the data to an Excel spreadsheet.



2. Select to Open the document or Save the document to the local computer.



The data will now be populated within an Excel spreadsheet. Users will be able to modify data using typical Excel functionalities.

FS Name: MAX Code	Row Type	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
Funding Source:	DME	0	0	0	0	0	0	200	300	400	
	SS	0	0	0	0	0	0	200	300	400	
On Ex.53: Yes	Total	0	0	0	0	0	0	400	600	800	
Planning Source:	DME	0	0	0	0	0	0	200	300	400	
	SS	0	0	0	0	0	0	200	300	400	
On Ex.53: Yes	Total	0	0	0	0	0	0	400	600	800	
Total Yearly Budgets	DME	0	0	0	0	0	0	400	600	800	
	SS	0	0	0	0	0	0	400	600	800	
	Total	0	0	0	0	0	0	800	1200	1600	

DatagridExport_6_5_2007.xls

Ready

1.4.6.2 Import from Excel

Having the ability to export data to Excel and make modifications or additions via an Excel spreadsheet and then upload these changes provides even more data manageability and facilitates data entry for all users. Once a user is ready to import that data back into eCPIC, they can do so by using the import functionality above each table. All tables, except for the Performance Baseline Tables and the Investment Dependency Table have Excel Import capability.

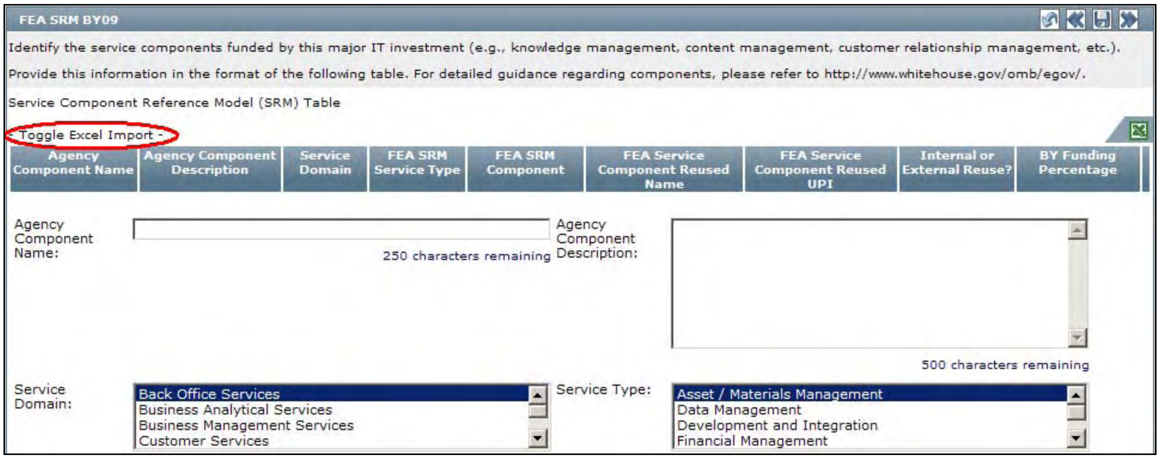
> **Note: The first row of the Excel file is always considered the column header row. This row is for the user's benefit in order to identify what each column represents. Only data from row two and onward will be imported into eCPIC.**

> **Note: Changes made to the header row are ignored by the eCPIC import. When parsing the data for import, the first column in the Excel file will be imported into the first column of the table, the second Excel column will be imported into the second table column and so on. The number of columns used in the Excel spreadsheet must match the number of columns of the eCPIC table being imported to, otherwise an error message will be displayed and no data will be imported.**

1.4.6.3 Importing from Excel (one worksheet)

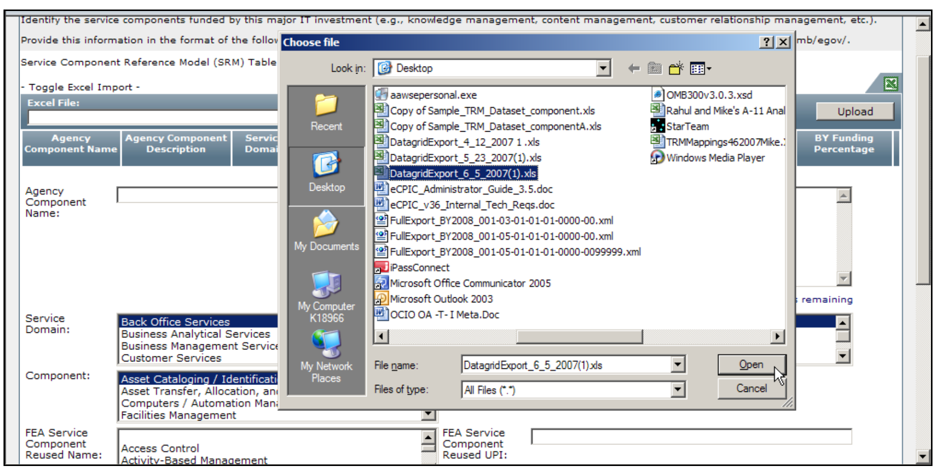
To Import from Excel:

1. From within the table that data will be imported, click on the **Toggle Excel Import** link.



2. Click on **Browse** to locate the filename to import.

3. Click on **Open** to populate the filename in the Excel file fields.



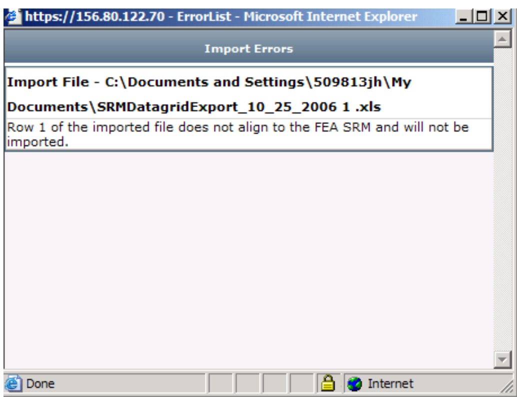
4. Click **Upload**.

The Excel import will now overwrite the previous data with the new data found in the Excel spreadsheet.

- Toggle Excel Import -

Agency Component Name	Agency Component Description	Service Domain	FEA SRM Service Type	FEA SRM Component	FEA Service Component Reused Name	FEA Service Component Reused UPI	Internal or External Reuse?	BY Funding Percentage	
Drug Programs	Drug Assistance	Back Office Services	Data Management	Data Mart	Travel Management	001-01-02-03-04-1579-33	No Reuse	40	Edit
Education 101	Education description	Back Office Services	Financial Management	Auditing	Access Control	001-01-02-03-04-9101-00	No Reuse	25	Edit
Research 101	Research test description	Business Analytical Services	Analysis and Statistics	Structural / Thermal	Surveys	001-01-02-03-04-1234-00	Internal	30	Edit
Monitoring Programs	Monitoring description	Business Analytical Services	Analysis and Statistics	Structural / Thermal	Surveys	001-01-02-03-04-5159-00	No Reuse	22	Edit
Human Resources	HR descripion	Customer Services	Customer Initiated Assistance	Assistance Request	Classification	001-01-02-03-04-3333-00	Internal	40	Edit
Training 101	Training test description	Customer Services	Customer Initiated Assistance	Online Tutorials	CAD	001-01-02-03-04-5678-00	External	40	Edit
Re-Entry Programs	Re-Entry support	Customer Services	Customer Initiated Assistance	Scheduling	Time Reporting	001-01-02-03-04-1234-00	External	10	Edit
Election Board	Election Rules	Customer Services	Customer Preferences	Subscriptions	Education / Training	001-01-02-03-04-1234-00	Internal	9	Edit
Outreach Programs	Outreach Assistance	Customer Services	Customer Relationship Management	Call Center Management	Query	001-01-02-03-04-1234-24	No Reuse	12	Edit
Managing	Managing classes	Digital Asset Services	Knowledge Management	Information Sharing	Education / Training	001-01-02-03-04-2222-00	No Reuse	20	Edit
Welcome Board	Welcome Assistance	Digital Asset Services	Records Management	Document Classification	Education / Training	001-01-02-03-04-2579-00	No Reuse	46	Edit

If there was any data that was not imported correctly, such as an alignment that is not valid, a pop up window will be displayed describing what data could not import. Users can use this window to address any problems in the Excel file and re-import the data.



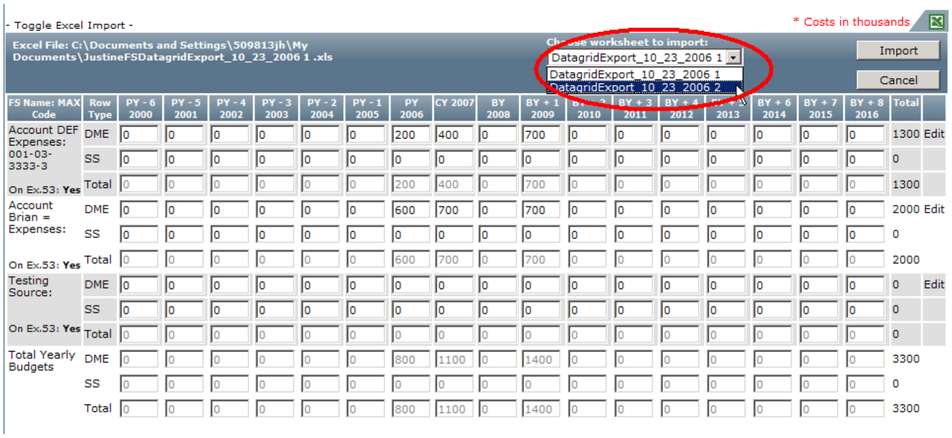
1.4.6.4 Importing from Excel (multiple worksheets)

Some users may want to import a specific worksheet from an Excel workbook that contains multiple worksheets.

To Import from Excel:

1. From within the table that data will be imported, click on the **Toggle Excel Import** link
2. Choose the filename to import
3. Click **Upload**

Once a user clicks upload, a drop-down box will appear that will list the spreadsheets within the workbook. Users can select which spreadsheet they wish to import. This selection will only display if the selected Excel workbook has multiple spreadsheets.



- Toggle Excel Import -

* Costs in thousands

Excel File: C:\Documents and Settings\509813jh\My Documents\JustineFSDatagridExport_10_23_2006 1 .xls

Choose worksheet to import: DatagridExport_10_23_2006 1

DatagridExport_10_23_2006 1

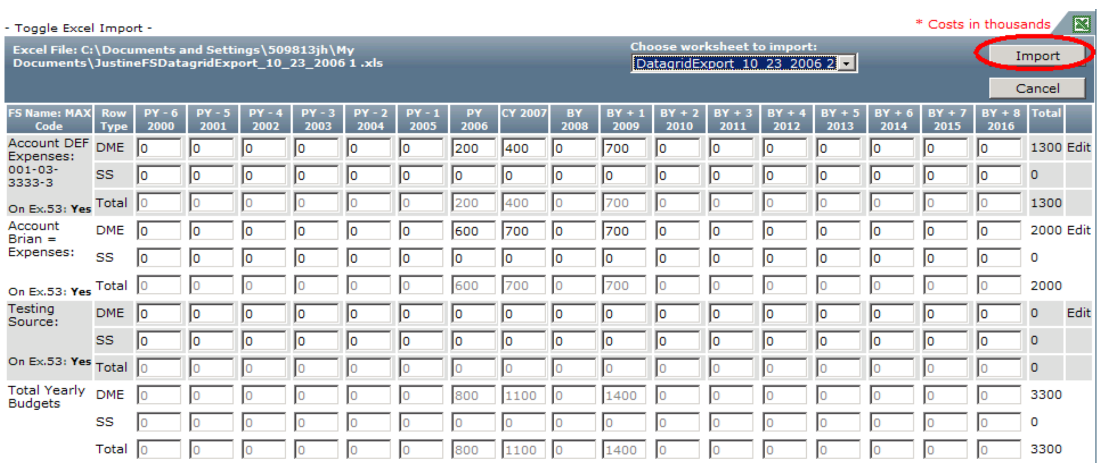
DatagridExport_10_23_2006 2

Import

Cancel

FS Name: MAX Code	Row Type	PY - 6 2000	PY - 5 2001	PY - 4 2002	PY - 3 2003	PY - 2 2004	PY - 1 2005	PY 2006	CY 2007	BY 2008	BY + 1 2009	BY + 2 2010	BY + 3 2011	BY + 4 2012	BY + 5 2013	BY + 6 2014	BY + 7 2015	BY + 8 2016	Total	
Account DEF Expenses: 001-03-3333-3	DME	0	0	0	0	0	0	200	400	0	700	0	0	0	0	0	0	0	1300	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	200	400	0	700	0	0	0	0	0	0	0	1300	
Account Brian = Expenses:	DME	0	0	0	0	0	0	600	700	0	700	0	0	0	0	0	0	0	2000	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	600	700	0	700	0	0	0	0	0	0	0	2000	
Testing Source:	DME	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Yearly Budgets	DME	0	0	0	0	0	0	800	1100	0	1400	0	0	0	0	0	0	0	3300	
	SS	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	800	1100	0	1400	0	0	0	0	0	0	0	3300	

4. After selecting the spreadsheet, click on **Import**.



- Toggle Excel Import -

* Costs in thousands

Excel File: C:\Documents and Settings\509813jh\My Documents\JustineFSDatagridExport_10_23_2006 1 .xls

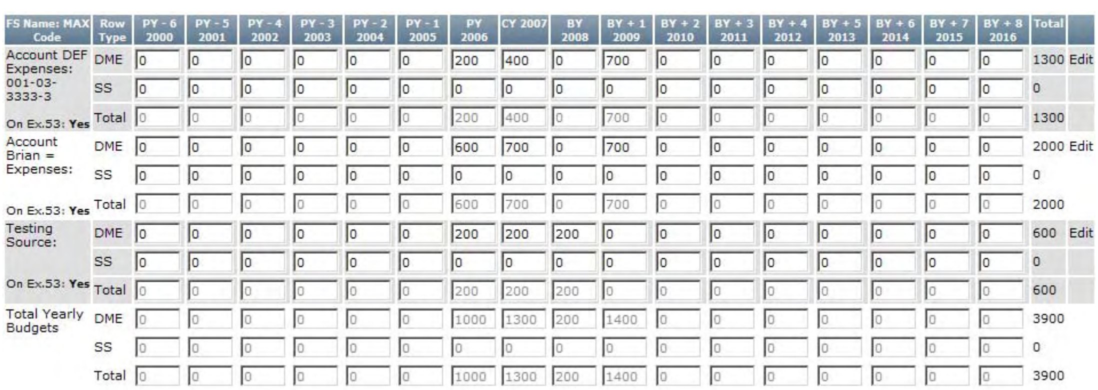
Choose worksheet to import: DatagridExport_10_23_2006 2

Import

Cancel

FS Name: MAX Code	Row Type	PY - 6 2000	PY - 5 2001	PY - 4 2002	PY - 3 2003	PY - 2 2004	PY - 1 2005	PY 2006	CY 2007	BY 2008	BY + 1 2009	BY + 2 2010	BY + 3 2011	BY + 4 2012	BY + 5 2013	BY + 6 2014	BY + 7 2015	BY + 8 2016	Total	
Account DEF Expenses: 001-03-3333-3	DME	0	0	0	0	0	0	200	400	0	700	0	0	0	0	0	0	0	1300	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	200	400	0	700	0	0	0	0	0	0	0	1300	
Account Brian = Expenses:	DME	0	0	0	0	0	0	600	700	0	700	0	0	0	0	0	0	0	2000	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	600	700	0	700	0	0	0	0	0	0	0	2000	
Testing Source:	DME	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Total Yearly Budgets	DME	0	0	0	0	0	0	800	1100	0	1400	0	0	0	0	0	0	0	3300	
	SS	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	800	1100	0	1400	0	0	0	0	0	0	0	3300	

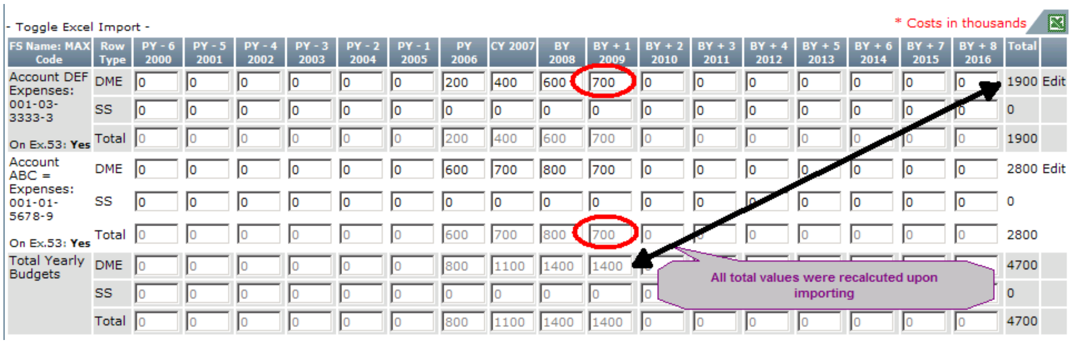
All data will now be imported from the selected spreadsheet.



FS Name: MAX Code	Row Type	PY - 6 2000	PY - 5 2001	PY - 4 2002	PY - 3 2003	PY - 2 2004	PY - 1 2005	PY 2006	CY 2007	BY 2008	BY + 1 2009	BY + 2 2010	BY + 3 2011	BY + 4 2012	BY + 5 2013	BY + 6 2014	BY + 7 2015	BY + 8 2016	Total	
Account DEF Expenses: 001-03-3333-3	DME	0	0	0	0	0	0	200	400	0	700	0	0	0	0	0	0	0	1300	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	200	400	0	700	0	0	0	0	0	0	0	1300	
Account Brian = Expenses:	DME	0	0	0	0	0	0	600	700	0	700	0	0	0	0	0	0	0	2000	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	600	700	0	700	0	0	0	0	0	0	0	2000	
Testing Source:	DME	0	0	0	0	0	0	200	200	200	0	0	0	0	0	0	0	0	600	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: Yes	Total	0	0	0	0	0	0	200	200	200	0	0	0	0	0	0	0	0	600	
Total Yearly Budgets	DME	0	0	0	0	0	0	1000	1300	200	1400	0	0	0	0	0	0	0	3900	
	SS	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	1000	1300	200	1400	0	0	0	0	0	0	0	3900	

1.4.6.5 Importing Financial Table Data

While the Total Rows/Columns for the Summary of Spending, FTE and Funding Source tables are expected for the Excel import, the actual values contained in these rows/columns will be replaced with the correct totals for the newly imported data. This ensures that the Totals information in eCPIC is always accurate.



- Toggle Excel Import - * Costs in thousands

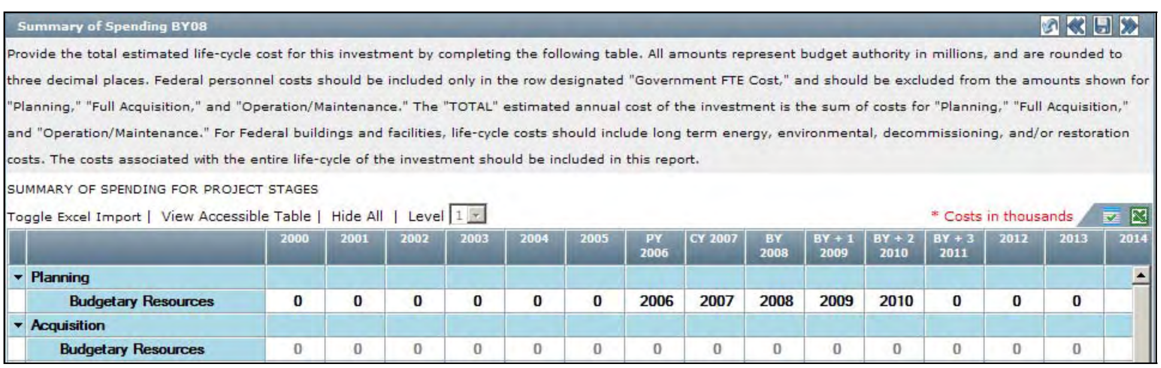
FS Name: MAX Code	Row Type	PY - 6 2000	PY - 5 2001	PY - 4 2002	PY - 3 2003	PY - 2 2004	PY - 1 2005	PY 2006	CY 2007	BY 2008	BY + 1 2009	BY + 2 2010	BY + 3 2011	BY + 4 2012	BY + 5 2013	BY + 6 2014	BY + 7 2015	BY + 8 2016	Total	
Account DEF Expenses: 001-03-3333-3	DME	0	0	0	0	0	0	200	400	600	700	0	0	0	0	0	0	0	1900	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: **Yes**	Total	0	0	0	0	0	0	200	400	600	700	0	0	0	0	0	0	0	1900	
Account ABC = Expenses: 001-01-5678-9	DME	0	0	0	0	0	0	600	700	800	700	0	0	0	0	0	0	0	2800	Edit
	SS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
On Ex.53: **Yes**	Total	0	0	0	0	0	0	600	700	800	700	0	0	0	0	0	0	0	2800	
Total Yearly Budgets	DME	0	0	0	0	0	0	800	1100	1400	1400								4700	
	SS	0	0	0	0	0	0	0	0	0	0	0							0	
	Total	0	0	0	0	0	0	800	1100	1400	1400	0	0	0	0	0	0	0	4700	

1.4.6.5.1 *Importing a Financial Table Excel File from a Different Budget Year*

When importing an Excel file from a different budget year, the imported data columns will be shifted so that the data will still align to the appropriate year. For example, if data is exported from the Funding Sources table from the BY08 template, then imported into an investment in the BY09 template, the data contained in the BY 2008 column in the Excel file will be imported into the CY 2008 column in the BY09 investment.

Note: The examples below show the Summary Of Spending table with the Outlays Rows set to inactive. It is up to the individual agency to decide if they would like the setting of Outlays Rows set to Active/Inactive. The System Administrator has the ability to change this setting and it can be set from Inactive/Active at any time.

2008 Investment data exported:



Summary of Spending BY08

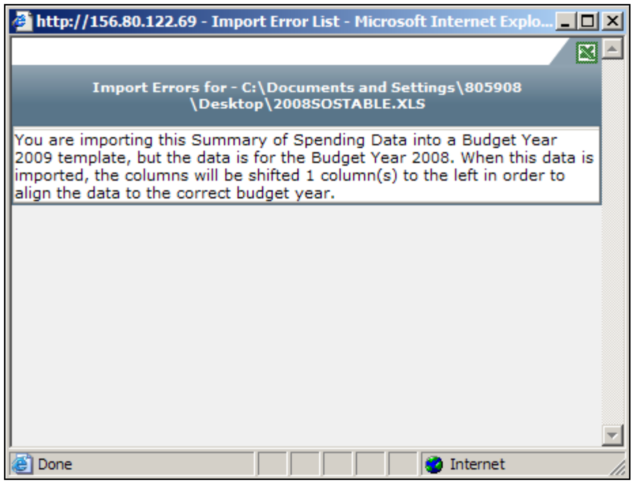
Provide the total estimated life-cycle cost for this investment by completing the following table. All amounts represent budget authority in millions, and are rounded to three decimal places. Federal personnel costs should be included only in the row designated "Government FTE Cost," and should be excluded 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

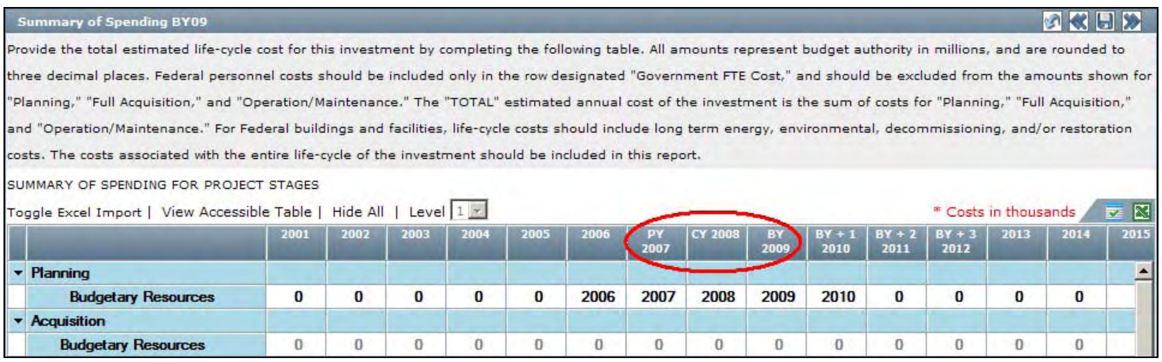
Toggle Excel Import | View Accessible Table | Hide All | Level 1 * Costs in thousands

	2000	2001	2002	2003	2004	2005	PY 2006	CY 2007	BY 2008	BY + 1 2009	BY + 2 2010	BY + 3 2011	2012	2013	2014
Planning															
Budgetary Resources	0	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Upon import, the following pop-up will appear:



2008 Investment after import:



	2001	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	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

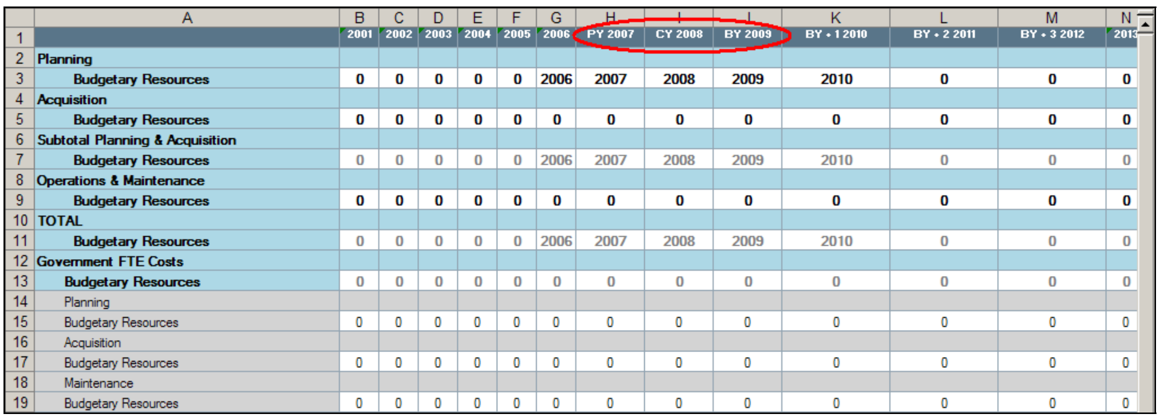
1.4.6.5.2 Importing an Excel File with Pre Submission data into a Post Submission View

If a System Administrator has changed the Budget Reporting Year to Post Submission and an Excel File is imported into a financial table with Pre-Submission headers, the data imported will populate into the years specified in the Excel spreadsheet even though the column headers in eCPIC have changed to reflect Post Submission.

Below is a SOS table in Pre Submission and an Excel export view of Pre Submission data:

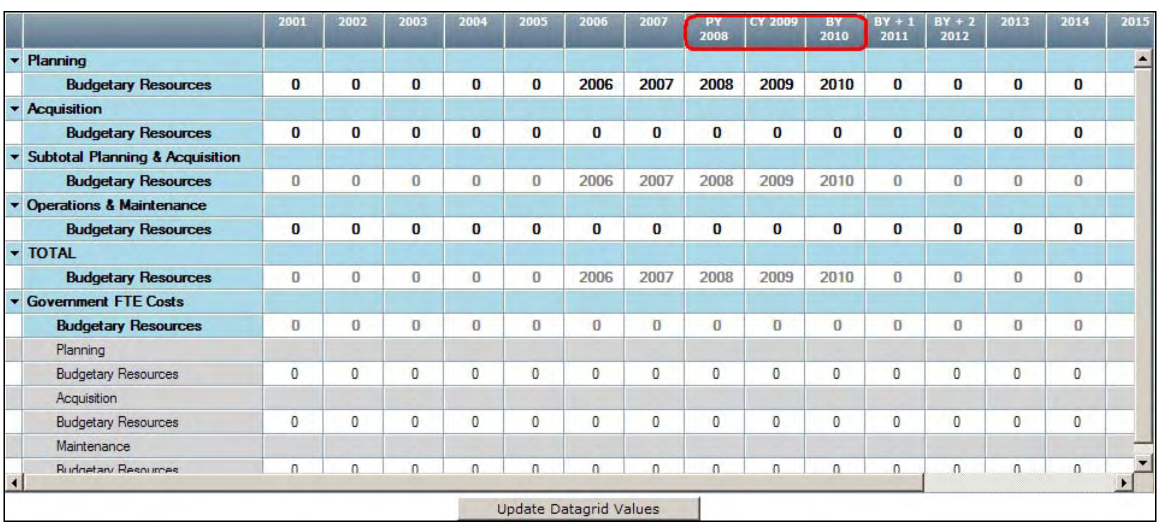
	2001	2002	2003	2004	2005	2006	PY 2007	CY 2008	BY 2009	BY + 1 2010	BY + 2 2011	BY + 3 2012	2013	2014	2015
Planning															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	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	2006	2007	2008	2009	2010	0	0	0	0	
Government FTE Costs															
Budgetary Resources	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	
Acquisition															
Budgetary Resources	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	

Update Datagrid Values



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		2001	2002	2003	2004	2005	2006	PY 2007	CY 2008	BY 2009	BY + 1 2010	BY + 2 2011	BY + 3 2012	201
2	Planning													
3	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
4	Acquisition													
5	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
6	Subtotal Planning & Acquisition													
7	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
8	Operations & Maintenance													
9	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
10	TOTAL													
11	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
12	Government FTE Costs													
13	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
14	Planning													
15	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
16	Acquisition													
17	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
18	Maintenance													
19	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0

If a user exports this data to Excel when the system is in Pre Submission display mode and then imports back into eCPIC with the system is in Post Submission display mode, the data will import as below:



	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	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	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	2006	2007	2008	2009	2010	0	0	0	0	
Government FTE Costs															
Budgetary Resources	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	
Acquisition															
Budgetary Resources	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	

Update Datagrid Values

Notice that the data that was in BY2008 is now populated under the CY 2008 column. The system will automatically adjust the data to appear under the Post Submission view even though the Excel spreadsheet showed a Pre Submission view.

When the System Administrator changes the display back to Pre Submission, the data will remain populated as it was reflected in the Excel spreadsheet with the years showing the Pre Submission view.

	2001	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	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	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	2006	2007	2008	2009	2010	0	0	0	0	
Government FTE Costs															
Budgetary Resources	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	
Acquisition															
Budgetary Resources	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	

Update Datagrid Values

1.4.6.5.3 Importing an Excel File with Post Submission data into a Pre Submission View

If a user exports data to an Excel spreadsheet from a Post Submission view and then imports the data into a Pre Submission view, the data imported will populate into the years specified in the Excel spreadsheet even though the column headers in eCPIC reflect Pre Submission.

Below is a SOS table in Post Submission and an Excel export view of the Post Submission data:

	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	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	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	2006	2007	2008	2009	2010	0	0	0	0	
Government FTE Costs															
Budgetary Resources	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	
Acquisition															
Budgetary Resources	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	

Update Datagrid Values

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1		2001	2002	2003	2004	2005	2006	2007	PY 2008	CY 2009	BY 2010	BY + 1 2011	BY + 2 2012	2013	2014
2	Planning														
3	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0
4	Acquisition														
5	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	Subtotal Planning & Acquisition														
7	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0
8	Operations & Maintenance														
9	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	TOTAL														
11	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0
12	Government FTE Costs														
13	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0
14	Planning														
15	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	Acquisition														
17	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0
18	Maintenance														
19	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0

Sheet1

Ready

If a user imports this Post Submission Excel File back into eCPIC with a Pre Submission display, the data will import as below:

	2001	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	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	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	2006	2007	2008	2009	2010	0	0	0	0	
Government FTE Costs															
Budgetary Resources	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	
Acquisition															
Budgetary Resources	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	

Update Datagrid Values

Notice that the data that was in CY2008 is now populated under the BY 2008 column. The system will automatically adjust the data to appear under the Pre Submission view even though the Excel spreadsheet showed a Post Submission view.

1.4.6.6 Importing Summary of Spending Excel File with Outlays Rows Hidden

From within the SOS table, System Administrators can select to display Outlays rows or select to hide them. If an Excel spreadsheet contains Outlays rows and the System Administrator has the Outlays rows hidden within eCPIC, the Outlays rows data will still be imported. However, users will not be able to view the data until the System Administrator has selected to display the Outlays rows.

Below is an Excel export that contains Outlays rows:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		2001	2002	2003	2004	2005	2006	PY 2007	CY 2008	BY 2009	BY + 1 2010	BY + 2 2011	BY + 3 2012	2013
2	Planning													
3	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
4	Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0
5	Acquisition													
6	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
7	Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0
8	Subtotal Planning & Acquisition													
9	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
10	Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0
11	Operations & Maintenance													
12	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
13	Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0
14	TOTAL													
15	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
16	Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0
17	Government FTE Costs													
18	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
19	Planning													
20	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
21	Acquisition													
22	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
23	Maintenance													
24	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0

Below is a view of the SOS datagrid with the Outlays rows hidden. The Excel import Outlays rows information is not displayed.

	2001	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	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	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	2006	2007	2008	2009	2010	0	0	0	0	
Government FTE Costs															
Budgetary Resources	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	
Acquisition															
Budgetary Resources	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	

Update Datagrid Values

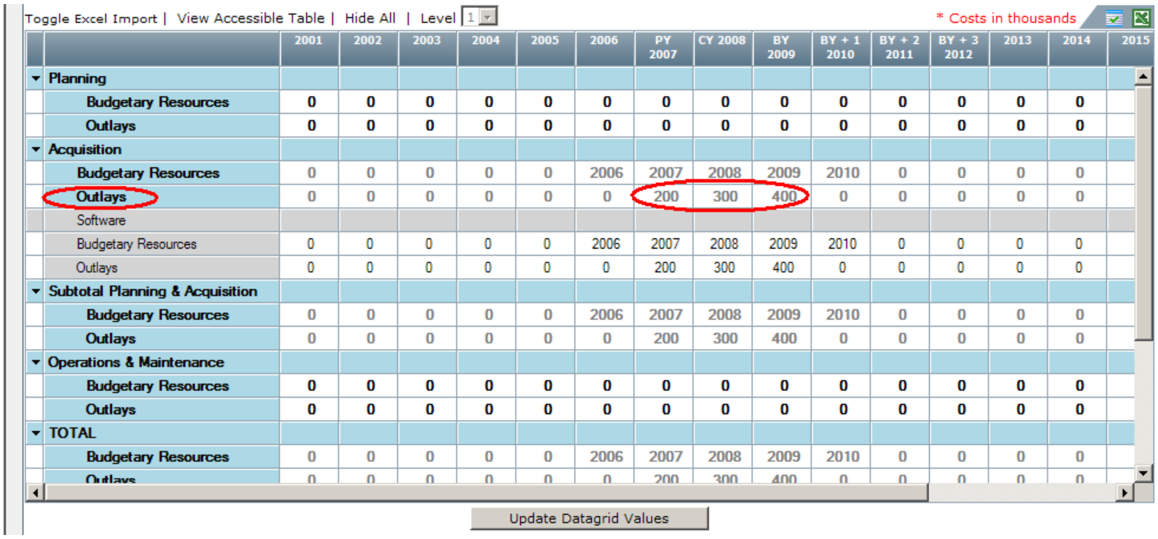
However, once the System Administrator displays the Outlays rows, the data from the import will now be visible:

	2001	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	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Operations & Maintenance															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTAL															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	

1.4.6.7 Importing Summary of Spending Excel File without Outlays

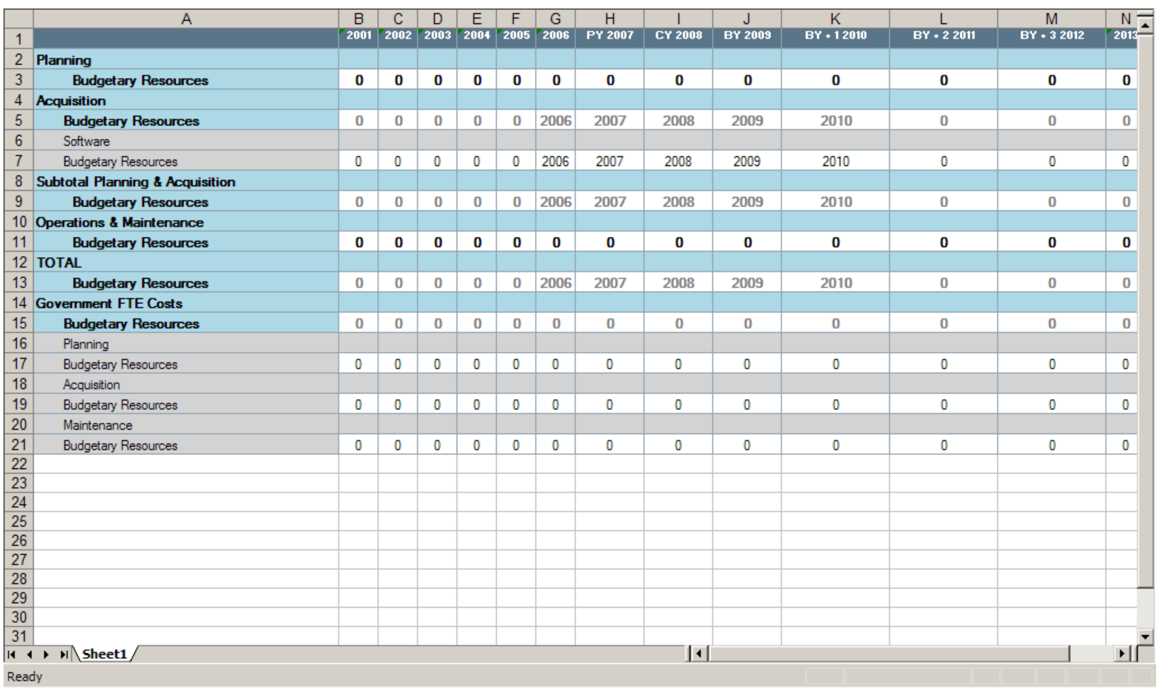
If a user imports a Summary of Spending Excel file that does not contain Outlays rows, the Outlays contained in the investments SOS table are not changed regardless of whether Outlays are displayed or hidden.

Below is a SOS table displaying Outlays rows with data populated:



	2001	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	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Software															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Operations & Maintenance															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTAL															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	

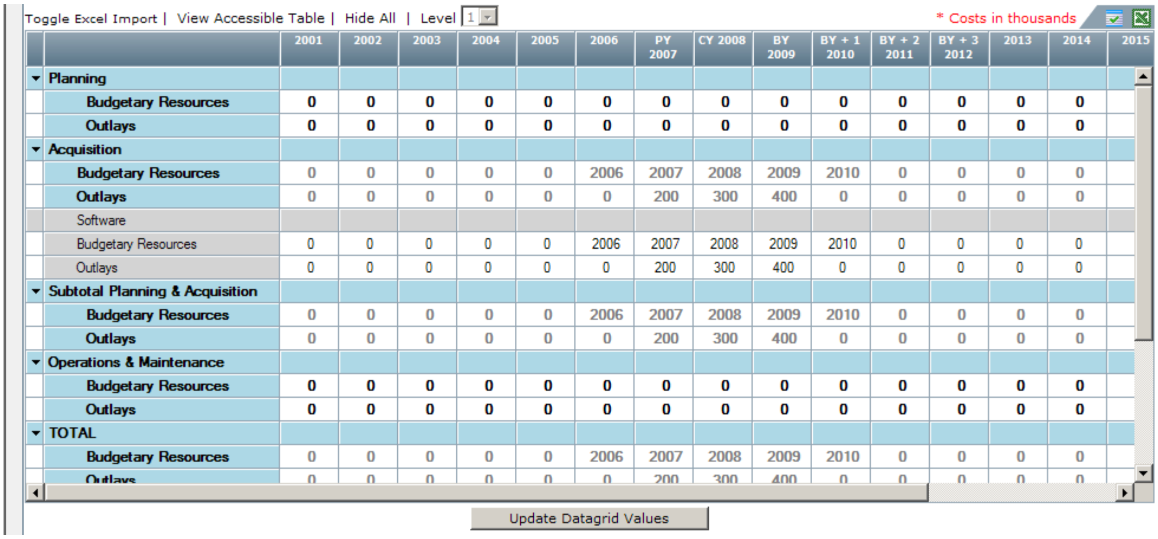
Here is an exported Excel spreadsheet without the Outlays rows:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1		2001	2002	2003	2004	2005	2006	PY 2007	CY 2008	BY 2009	BY + 1 2010	BY + 2 2011	BY + 3 2012	201
2	Planning													
3	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
4	Acquisition													
5	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
6	Software													
7	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
8	Subtotal Planning & Acquisition													
9	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
10	Operations & Maintenance													
11	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
12	TOTAL													
13	Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0
14	Government FTE Costs													
15	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
16	Planning													
17	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
18	Acquisition													
19	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0
20	Maintenance													
21	Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0

If the System Administrator changes the display option to show Outlays rows once again, and a user imports the Excel spreadsheet that does not contain Outlays, the Outlays data will remain in the SOS not be overwritten. However, all Budgetary Resources data will be overwritten and the total rows values will be recalculated.

Below the Budgetary Resource data was changed, however, the historical Outlays rows data remained.



Toggle Excel Import | View Accessible Table | Hide All | Level 1 * Costs in thousands

	2001	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	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Software															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Subtotal Planning & Acquisition															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	
Operations & Maintenance															
Budgetary Resources	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Outlays	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTAL															
Budgetary Resources	0	0	0	0	0	2006	2007	2008	2009	2010	0	0	0	0	
Outlays	0	0	0	0	0	0	200	300	400	0	0	0	0	0	

Update Datagrid Values

1.4.6.8 Importing Enumeration Values into Tables

For many of the tables in eCPIC, OMB has defined what values may be used for a given column. The data stored in eCPIC for these columns must match the OMB enumerations exactly, however in some instances, the eCPIC Excel Import will allow for minor variations on these values. On import, if the data is close to, but does not exactly match one of the OMB enumerations, it will be replaced by the closest enumeration value. If the value is not close enough to any of OMB enumeration values, that data cell will be imported as blank and will generate a warning for the user. This will allow for users who misspell or mistype a value to still import the data correctly.

For example, in the "Operational Systems – Security" table, the column "Agency/ or Contractor Operated System?" has three allowable enumeration values: Contractor and Government; Government Only; and Contractor Only. If one of the rows imported from Excel contains "contactor only" (note the misspelling of Contractor), the value will be imported as the correct "Contractor Only".

1.4.6.9 Troubleshooting Excel Import Issues

An error will not always be generated when importing Excel spreadsheets to tables. However, when an XML Export is conducted, the validation will expose any issues within the tables that are not valid with OMB requirements.

Below is a list of common issues that users may encounter:

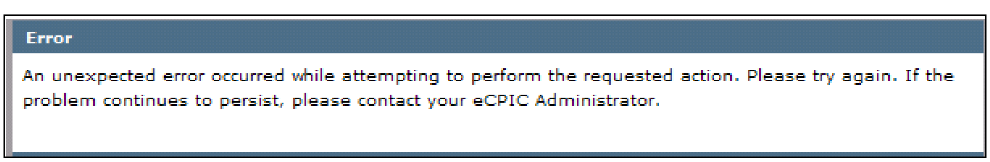
SYNOPSIS	CONCLUSION
User enters a new Contact person in the Contracts table and received an XML validation.	Users can create a new contact, however, that contact will not be added in the application. It will only be added to the table. The contact information will be maintained for that row in the Contracts Table, but will now be available in other

SYNOPSIS	CONCLUSION
	areas of the application. If the contact information for this row of the Contracts Table is edited, this contact information will be lost.
User enters an invalid UPI code.	The invalid UPI code will import. However, upon an XML validation, an error will appear.
Users imported more than 4 ‘True’ Send to OMB Alternative Analysis.	The first 4 alternatives (3 in BY2007 and prior) that have “True” set will be imported as “True.” After the fourth “True” item, all alternatives will have the value “False” for Send to OMB.
User left the ‘Send to OMB’ field blank in the Alternative Analysis table.	Upon import, the data will populate as ‘False’.
User enters an invalid ‘Measurement Area’ in the PRM table and an invalid ‘Measurement Category’.	If the Measurement Grouping is a valid Grouping value, the appropriate PRM hierarchy will be imported. If this is different than the hierarchy that is specified in the Excel file, a warning message will be displayed.
User enters an invalid ‘Service Domain’ in the SRM table or an invalid ‘Service Type’.	If the Component is a valid Component value, the appropriate SRM hierarchy will be imported. If this is different than the hierarchy that is specified in the Excel file, a warning message will be displayed.
User enters an invalid ‘FEA TRM Service Area’ in the TRM table or an invalid ‘FEA TRM Service Category’.	If the FEA TRM Service Standard is a valid Service Standard value, the appropriate SRM hierarchy will be imported. If this is different than the hierarchy that is specified in the Excel file, a warning message will be displayed.
Funding Sources must exist in eCPIC in order to import that Funding Source’s data	If a Funding Source described in the Excel file does not exist in eCPIC, then that Funding Source will not be imported and a warning will be displayed to the user. The Funding Source Name is used to determine whether the funding source exists.
Partner Agency Name	In tables where a Partnering Agency needs to be specified, columns for the Partner Agency Name and Partner Agency Code are included. The import will use the Partner Agency Code to determine which Partnering Agency is specified. If the Partner Agency Name refers to a different Agency than the code, a warning will be displayed and the appropriate

SYNOPSIS	CONCLUSION
	Partner Agency Name will be imported. This is true for the Stakeholder Table, Partner Capital Assets within This Investment, or the Partner Funding Strategies Table.
Summary of Spending Rows in the Excel File must match the rows in the Summary of Spending Table in eCPIC.	If the order of the rows is different between Excel and eCPIC, or if the incorrect number of rows is imported, then an error message is displayed and the data will not be imported.
FTE Table Rows in the Excel File must match the rows in the FTE Table in eCPIC.	If the order of the rows is different between Excel and eCPIC, or if the incorrect number of rows is imported, then an error message is displayed and the data will not be imported.
Federal Quantitative Benefits Table Rows in the Excel File must match the rows in the Federal Quantitative Benefits Table in eCPIC.	If the order of the rows is different between Excel and eCPIC, or if the incorrect number of rows is imported, then an error message is displayed and the data will not be imported.
In all datagrids, free text entry columns which have an OMB defined max length.	If more text than allowed is imported into a column that has a character restriction on it, a warning message will be displayed for the user and the text will be truncated to that character limit.

1.4.7 Error Handling

Error handling and logging provides the capability for all errors to be logged to an XML file on the eCPIC application server. When an unexpected error has occurred, an error message will be displayed to the end user. The Error Log will assist in troubleshooting issues that arise with Agencies. The Error Log is accessible via the application server in a folder created during an install called ErrorLog.



General users should double check that this is an eCPIC error and not a small glitch that may have occurred (i.e., *someone else performing the same function at the same time, computer issues, etc.*).

1. Log out of eCPIC. (*Make sure the 'Log out' link is used or the session will be locked out until it has expired*).

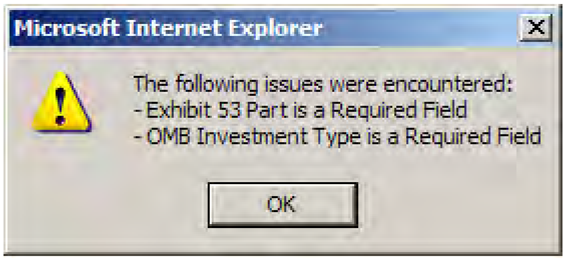
2. Log back into eCPIC.

3. Repeat the procedure that caused the first error. This will ensure there is definitely an error.

4. If no error message appears, proceed to action needed. If the warning message does appear, then notify the Administrator and explain the steps that were taken when this message occurred.

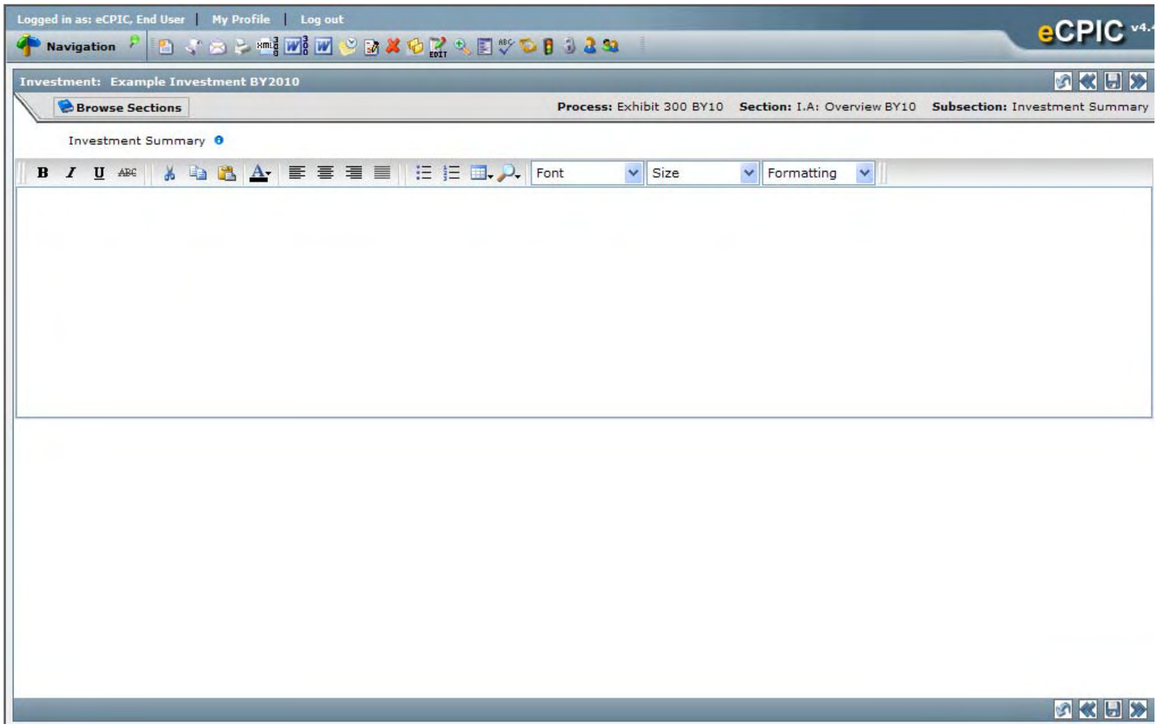
1.4.8 Field Validation Warning Message

If a user attempts to save data within eCPIC, they may receive an alert warning that lists all of the fields that are required and do not have data entered or fields in which incorrect data is included, such as text in an integer field. Users will still receive the red text underneath of the field to assist in correcting the field once the pop-up window has been closed. Below is an example of the alert message:



1.4.9 Rich Text Areas

Within the eCPIC application, custom fields can be created by the System Administrator which allows for Rich Text format (RTF), i.e. formatted text, instead of simply plain (unformatted) text. These fields will display a markup tool bar above the text area.



When importing and exporting investments from/to XML and exporting investments to Word, all formatted text, HTML tags, and special characters will be transferred. This enables readers to view written text in a much easier way than just a group of text that is unformatted. It also saves the user time from having to format the text manually. Additionally, during data entry the cut and paste will now carry over all formatting into the Rich Text Area.

The following are available features that can be used to manipulate text, spacing, and lines within a Rich Text area:

B	Bold font type	*I*	Italic font type
U	Underline font	~~ABC~~	Strikethrough
	Font color		Cut
	Copy		Paste
	Justify Left		Justify Center
	Justify Right		Justify Full
	Unordered List		Ordered List
	Display Table Menu- Able to insert and format table		Zoom to different percentages for Rich Text fields only
Font	Font types	Size	Font size
Formatting	Formats available		

Note: When inserting a table in the Rich Text control set the table Width to 95% in order to prevent horizontal scrolling in eCPIC.

Note: To insert Microsoft Excel table into the Rich Text control, place borders around the cells in Excel. This will display the table appropriately when copied into the Rich Text control.

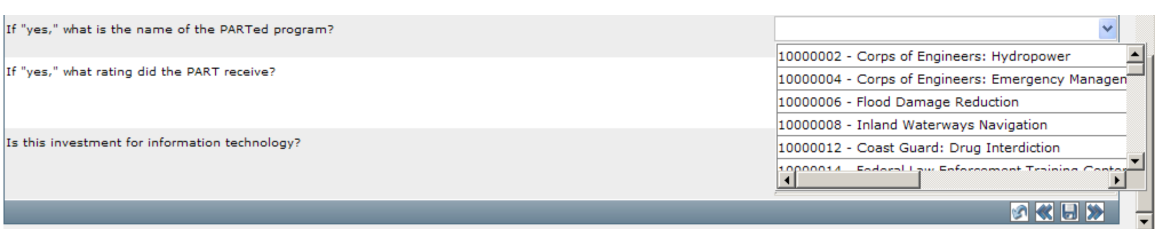
Note: When inserting data into Rich Text Fields, please note that when a user clicks 'Enter' the format is double spaced. To have the formatting changed to single spacing, the user will have to click 'Shift + Enter'.

Note: The Zoom function for the Rich Text Fields only work from within the RTF areas. The general Zoom buttons in eCPIC, located on the main toolbar, will not spell check or zoom into a Rich Text Field.

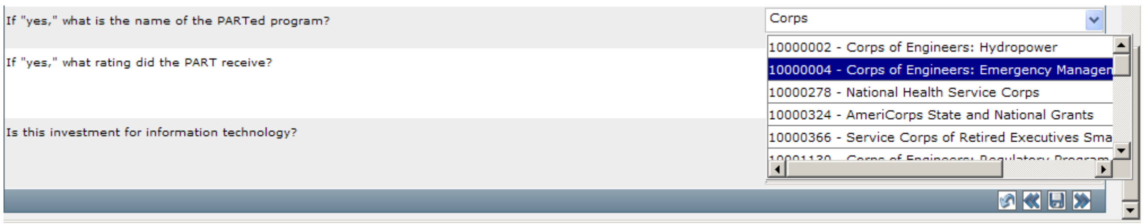
1.4.10 Type-ahead Dropdown List Box

The type-ahead dropdown list box has been implemented in eCPIC to assist users when selecting a single item from a long list of options. The type-ahead dropdown list box acts as a standard HTML dropdown list where users can select an item by expanding the list and scrolling through options. The type-ahead dropdown list box also allows for filtered searching by allowing users to type hints into the text box portion of the dropdown box. The hints will filter the choices down to a smaller subset of options that contain the text as it was typed into the textbox.

In the BY2010 template, the field *If "yes," what is the name of the PARTed program?* contains over 1,000 possible choices, and therefore may be difficult to locate the desired option. The type-ahead drop down allows users to filter down the list of options to a smaller subset, making it easier to find the exact option.
Below is a view of the PARTed program dropdown list box when it is opened without using the filter.



To use the field filter for this list, enter in a phrase into the text box to narrow down the list of available programs. The dropdown list will open and an icon identifying that the filtering is in process will be displayed. Once complete, the list will be a subset of PARTed Program Names containing the hint text. Users may then select the appropriate program name by clicking on the appropriate choice.

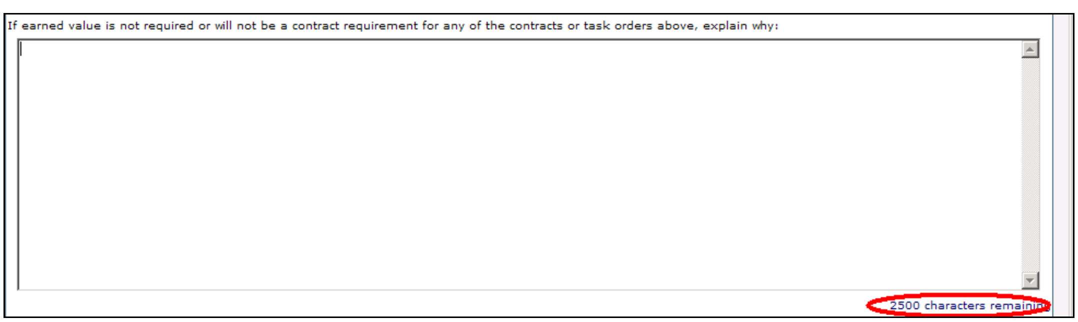


1.4.11 Character Counter

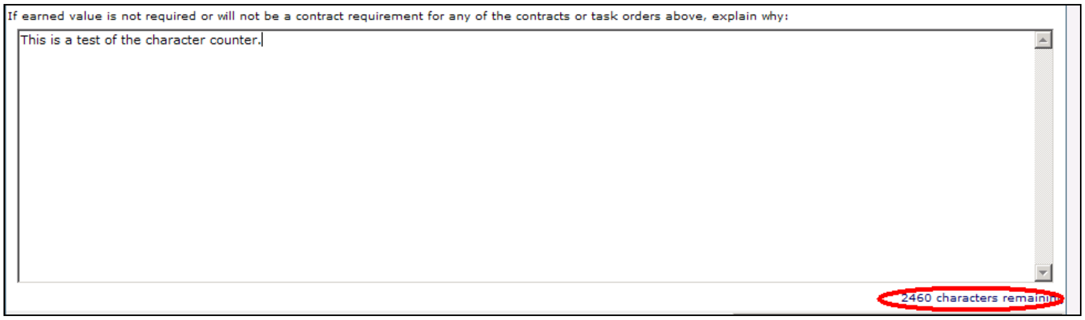
From within the default Processes, OMB specifies how many characters are allowed in certain field types (*Text Areas and Text Boxes*). To assist the user in keeping track of the amount of characters used, a **Character Counter** is located at the bottom of each field stating how many characters are allowed within the field. As characters are entered into the field, the counter will show users how many characters they have left to input in a text box or text area control. Any text that a user types beyond the specified limit will be removed, leaving the maximum number of characters. If the user pastes text into the field that takes the character count above the limit, a warning will be displayed and the characters beyond the limit will be removed.

When a user pastes text into a text field containing a character counter via the right mouse click option, the counter will not update until either another key is pressed or the user clicks off of the input control. If the user is over the character limit, a message will then be displayed and the text will be truncated to the acceptable length. Note, however, this only applies when the user pastes text by right-clicking on the control and choosing paste with the mouse. If the user pastes text into the control using Ctrl + V on the keyboard or types directly into the control, then the character counter will update immediately.

Below, the following field has a 2500 character limit.



As a user begins to type data, the character counter will begin subtracting each character entered.



Per OMB, the following is a list of how many characters are available for fields with limitations:

Short Text: 250 characters, Medium **Text**: 500 characters, Long **Text**: 2500 characters.

System Administrators have the ability to create custom fields and apply a character limitation. When users go to input data into the field, they will see the character counter located at the bottom of the text box specifying the amount of characters available for input.

Note: If a System Administrator decides to change the character limit of the field after data has already been entered to a lower amount, the amount of text inputted into the field will still remain. However when a user begins to edit that field, the characters beyond the character limit will be removed.

Note: The Character Counter text will not be exported to Word or XML.

Note: The Character counter will not be displayed for any field that is marked as Read Only by an Administrator.

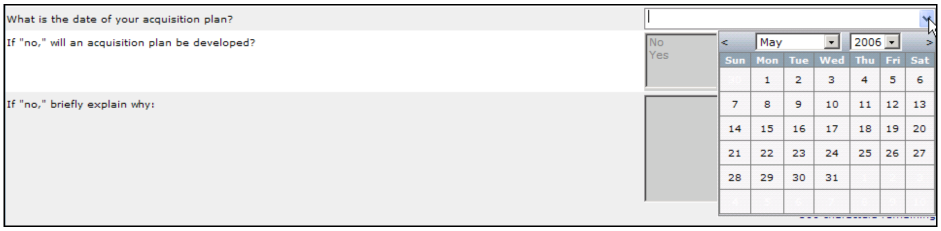
1.4.12 Date Chooser

When fields that require a date as an input control are accessed or created, a **Date Chooser** is used to assist in quickly selecting a particular date.

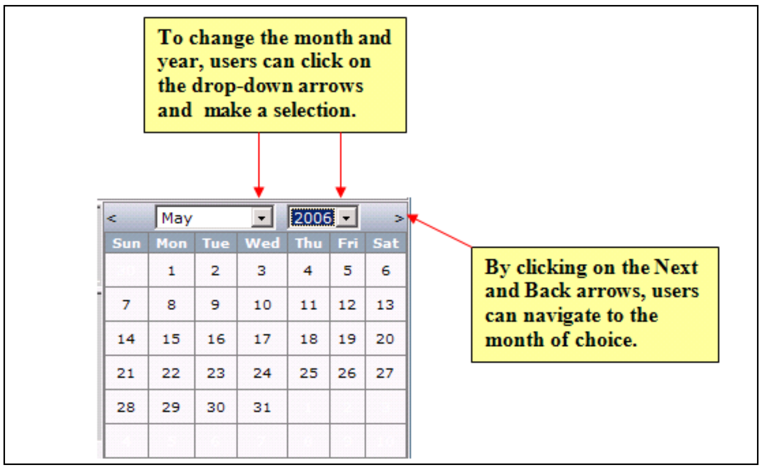
To use the Date Chooser:

1. Click on the drop-down arrow located within the field.

A Date Chooser will appear:



Using the navigational tools provided, users can quickly access different months and years.



2. Once the date of choice has been selected, double click on the day to be entered into the field.

The date will now appear in the field. Each time the calendar is accessed, that date will be highlighted on the calendar.

Users have the option to type in the date manually into the Date Chooser. The field will only accept numbers and the '/' symbol. The date chooser will also automatically insert the '/' symbol where appropriate as the user types.

Note: The Date Chooser will not allow the user to type in any value that would create an invalid date. For example, if the user has entered "5/3" the date chooser will ignore any numbers greater than one for the next character typed because that would create an invalid date.

1.4.13 Dependent Fields

Within the default Processes, there are some fields that are considered a Dependent Field. These fields in the workflow are enabled or disabled based upon the response to another question. The field that enables or disables a dependent field is known as a parent field. For example, from within the *I.A. Overview* Section and the *IT Screening Questions* Sub-Section the question states:

"*Is this a financial management system*?" Yes/No

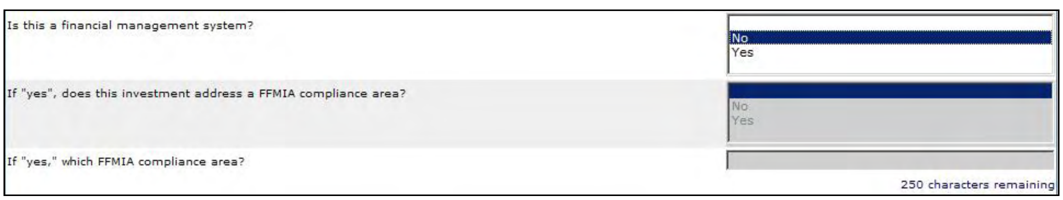
The next two questions state:

"*If "yes," does this investment address a FFMIA compliance area*?" and
"*If "yes," which FFMIA compliance area*?"

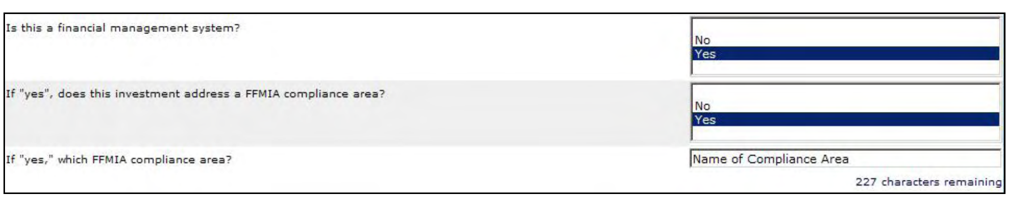
The first question is a parent field. The following questions are dependent fields. If the user selects 'Yes' for the parent, the dependent field will be enabled.

If the user selects 'No' for the parent field, the dependent field will automatically be disabled since the question only needs to be answered if the answer 'Yes' is selected.

Note: Questions can be dependent on responses of "Yes" "No" or "N/A" from the parent. The question itself will guide the user as to which parent answer a dependent field is enabled on.

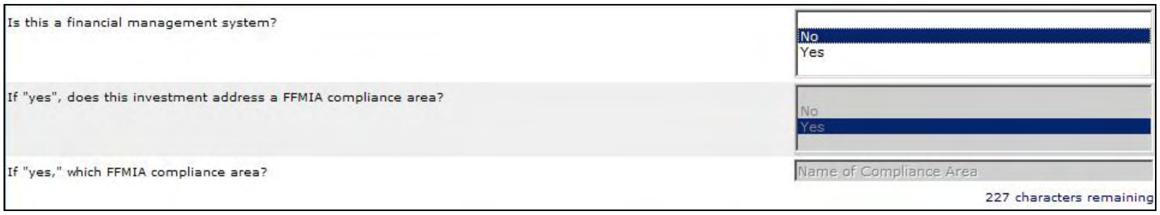


If the user selects 'Yes' for the parent field, they will be able to enter responses for the dependent fields.



If its parent field answer is changed by a user and the dependent field becomes disabled, it will maintain any data that was previously entered. To change or remove the data in this dependent field, enable it by selecting the appropriate parent field value or answer, change the dependent field value, revert the parent field to the desired answer, then click the save icon to save the page.

Below, the dependent field data was not removed. Upon changing the parent field to 'No', both dependent fields maintained their responses.



Note: Currently, the ability to create custom Dependent Fields is not an option.

Note: The XML 300 will export the data input from Dependent Fields regardless of text entered into the parent field.

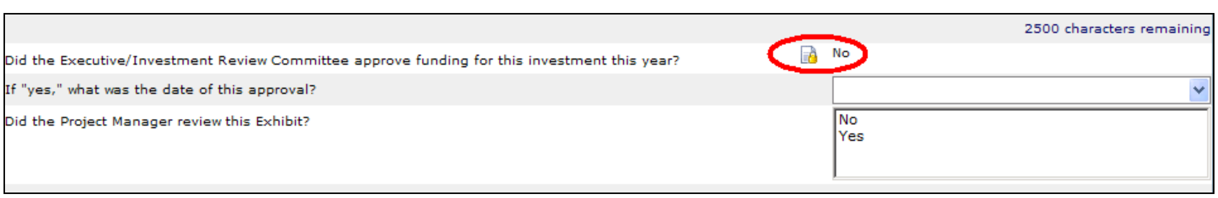
1.4.14 Read Only Fields

In the eCPIC application, System Administrators have the ability to set fields to Read Only. If the System Administrator has set any custom created fields or OMB fields to Read Only, a Read Only icon will appear in the Investment Workflow where the field was placed to assist users in easily identifying which fields are Read Only and which are not.

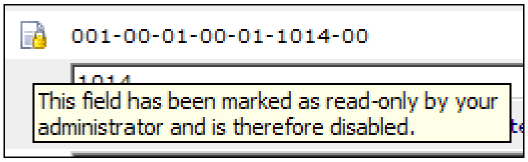
1. From within the Investments module, navigate to the section and sub-section in which the field appears.

Example of Custom Read Only field in Investment Workflow:

Example of OMB Read Only field in Investment Workflow:



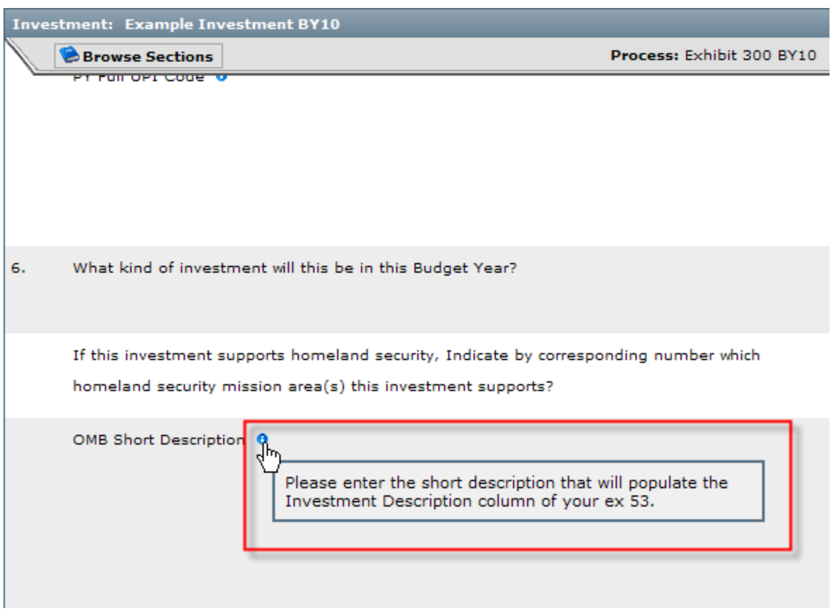
If the user places the mouse over the icon, the pop-up text will state that the field is a Read Only field.



1.4.15 Field Help Information

To increase the visibility of the field help text that is associated with individual fields, a field help icon ( ) will appear next to all fields that contain help information. Field help text can be defined by an administrator for any investment field within the system. To display field help text for a field:

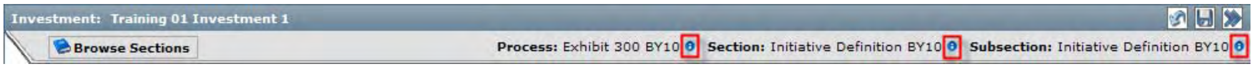
1. Navigate to an investment
2. Within any subsection, mouse over the ( ) icon located at the end of the field name
3. A pop-up will display containing the field help information



Note: The field help icon ( ) will only be displayed for fields that have help text defined. If a field does not have any help text defined, the field help icon will be omitted.

1.4.16 Workflow Help Information

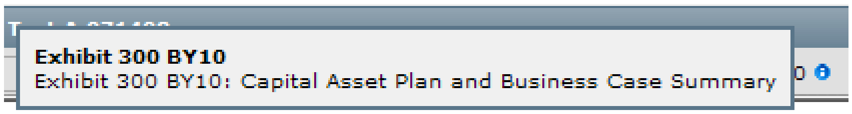
When viewing an investment, the Process, Section and Sub-Section help information that has been defined by an Administrator will be displayed. An information ( ) icon will display to the right of each workflow item, providing popup help information when the user hovers over. The display includes the Help Title in bold, with the Help Description displayed below. Both of these items are editable by Administrators for each Process, Section and Sub-Section.



To display the workflow help text:

1. Mouse over the information (o) icon

2. The field help description will now display



1.4.17 Agency Codes

In some datagrids, users will have to select an agency from a drop-down list. The majority of the agencies have one code associated with them. However, the item **Department of State and Other International Programs** has two codes associated with it, 014 and 184. Since users cannot use both codes when making a selection, any agency listing that has the code 184 will be listed under **International Assistance Programs.**

Department of State and Other International Programs			
Administration of Foreign Affairs	014	05	19
International Organizations and Conferences	014	10	19
International Commissions	014	15	19
Other	014	25	11,19,95
Millennium Challenge Corporation	184	03	95
International Security Assistance	184	05	11
International Security Assistance	184	05	72
Multilateral Assistance	184	10	11
Multilateral Assistance	184	10	72
Agency for International Development	184	15	72
Overseas Private Investment Corporation	184	20	71
Trade and Development Agency	184	25	11

Peace Corps..	184	35	11
Inter-American Foundation..	184	40	11
African Development Foundation...	184	50	11
International Monetary Programs..	184	60	11
Military Sales Program..	184	70	11
Special Assistance Initiatives..	184	75	72

To view a list of all the agency codes, please visit the following URL:

http://www.whitehouse.gov/omb/circulars/a11/current_year/app_c.pdf

For agencies that cannot be found, users may have to find the agency website to see which agency they could possibly align to. For example, after looking up the 'MedPac' agency website, it was determined to use the **Department of Health and Human Services** code.

The following are codes that currently do not have an associated Agency per Appendix C. A request for clarification on these items has been sent to the OMB; however, no response has yet been given.

361
375
448
486
491
492
507
516
520
522
523

1.5 Rights and Permissions

RIGHTS are used to designate Create, Read, Update, Delete and Assign Permissions access for the Investments, Portfolios, Scoring, OMB Submission, and Resource Library modules. Access to the Admin module is also assigned through RIGHTS. If a user is assigned 'Global Admin' RIGHTS, it means that they can access and make modifications to every area of the Admin module.

For basic eCPIC users, RIGHTS may not be the best way to grant access to the system, as RIGHTS are meant to provide *overarching access to entire modules*. When access to every item within a module is not the goal, using PERMISSIONS to control access is the