

4. INVESTMENTS

The Investments module is used for creating and managing all investment information. In the Investments module, users can create new investments, make revisions and continually manage data throughout an investments life cycle.

4.1 Overview

Each investment is associated with a Template. The Template contains the default Processes which reflects all the required fields for OMB. These fields are separated by Sections and Sub-Sections within the Process.

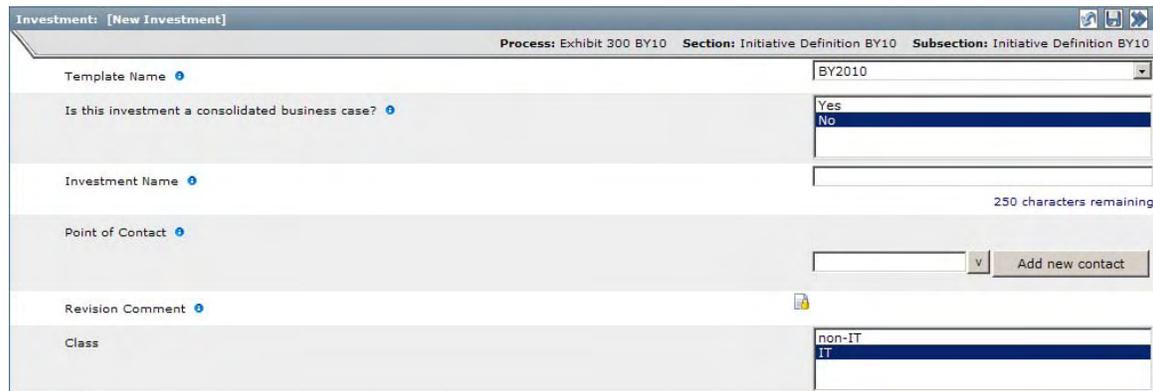
All fields associated with the Exhibit 300 and the Exhibit 53 are answered and edited within the Investments module. However, eCPIC allows System Administrators to create Agency-defined fields that can be included in the default processes or an Agency-defined process. When submitting to OMB, only the *OMB defined* fields export to XML 300 for submission to OMB.

For more information on OMB required fields, see the *A-11 Guidance* or log on to www.egov.gov.

4.2 Creating New Investments

The following are instruction to create a new investment:

1. Click on the **Investments** module to access the Standard View.
2. Click the **New Investment** icon (). The Investment Definition form will appear:



The screenshot shows a web form for creating a new investment. The form is titled "Investment: [New Investment]" and has a breadcrumb trail: "Process: Exhibit 300 BY10 > Section: Initiative Definition BY10 > Subsection: Initiative Definition BY10". The form contains the following fields and options:

- Template Name:** A dropdown menu with "BY2010" selected.
- Is this investment a consolidated business case?:** A radio button group with "Yes" and "No" options. "No" is selected.
- Investment Name:** A text input field with a "250 characters remaining" indicator.
- Point of Contact:** A text input field with a dropdown arrow and an "Add new contact" button.
- Revision Comment:** A text input field with a lock icon.
- Class:** A dropdown menu with "non-IT" and "IT" options. "non-IT" is selected.

3. When creating a new investment, users have the option of associating the investment with any of the templates that are available. Select the **Template Name** the new investment will be associated with.

Investment: [New Investment] Process: Exhibit 300 BY10 Section: Initiative Definition BY10 Subsection: Initiative Definition BY10

Template Name

Is this investment a consolidated business case?

Investment Name

Point of Contact

Revision Comment

Class

4. Select whether the new investment will be a **consolidated business case**. If ‘Yes’ is selected, users will have the ability to create sub-investments for the new investment.

Note: Once ‘Yes’ or ‘No’ has been selected for the consolidated business case question, users will not be allowed to change it. Only System Administrators have the capability to switch investments from consolidated to unconsolidated.

5. Enter the **Investment Name**.
6. Enter the **Point of Contact (POC)**. Clicking on the drop-down arrow will show a list of selections. If no names appear or if the POC is not listed, then click on the **Add new contact** button and fill in the required information. If no contact is selected, the creator of the investment will populate the field.

Point of Contact

First Name (required)

Middle Initial

Last Name (required)

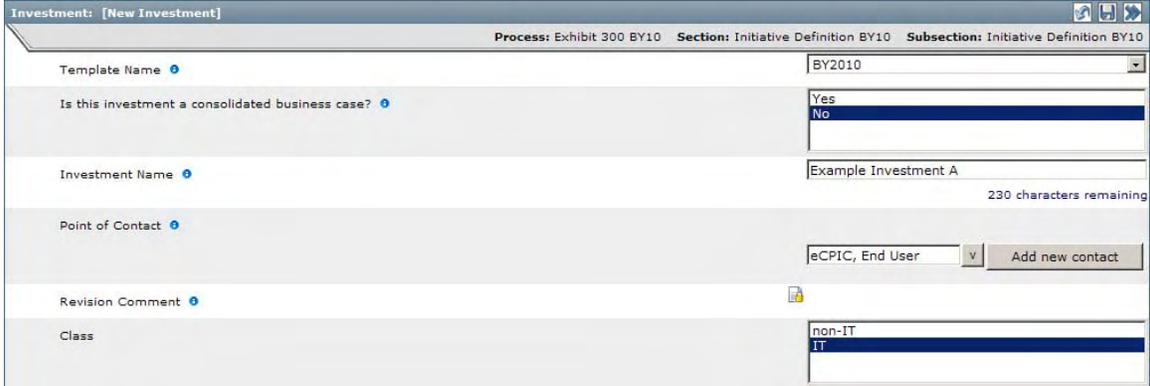
Email (required)

Phone number (required)

Note: The Revision Comment is entered when revising an investment. Once a revision has been made, the older copy is then locked down and will only be available in a ‘view’ mode. The revision comment will appear with the older version of the investment in ‘view’ mode.

7. Enter in the **Class**. This will specify if the investment is for Information Technology or not.

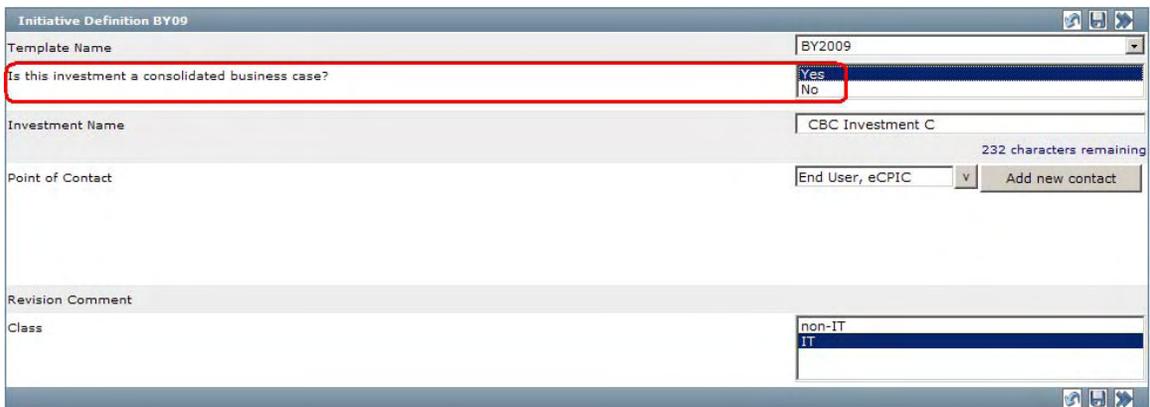
- Click on the **Next** arrow  to save information to the database and proceed to the next section of fields. The user can also choose to just **Save**  the information without moving forward or **Undo**  to remove all data entered.



4.3 Creating a Consolidated Business Case

Any user with ‘Create’ RIGHTS to the Investments module will be able to create a consolidated business case (*i.e., umbrella investment or parent investment*). Unless users are a System Administrator, they will have to create a new investment in order to create a consolidated business case. They will not be able to change an unconsolidated investment to a consolidated investment.

- Click on the **New Investment** icon  to create a new investment (*this investment will be considered the parent or umbrella investment*).
- Select the **Template Name** in which the investment will be created.
- Select **Yes** from the ‘Is this investment a consolidated business case?’.



- Fill in the rest of the Investment Definition form.

- Click on the **Next** arrow  to save information to the database and proceed to the next section of fields. The user can also choose to just **Save**  the information without moving forward or **Undo**  to remove all data entered.

Note: Now that the new investment is a consolidated business case, users will not be able to edit the data in the *Summary of Spending, FTE, and Funding Sources* table. This data will have to be managed in the sub-investment(s). The values from the sub-investment(s) will roll up to the parent investment and will not be editable. However, all other parts of the parent investment can be managed separately. This means that each parent investment will have its own selections for the FEA Reference model tables, Alternative Analysis table, etc.

4.3.1 Selecting/Deselecting CBC Children Investments

Children investments can be assigned to a parent investment. Each child investment can be managed separately. However, the values in the children investments from the Summary of Spending, FTE, and Funding Sources table will roll up to the parent investment. Upon removing a child investment, the roll up values in the parent investment will recalculate to reflect the disassociation.

- Click on the **Investments** module
- Click on the **Parent/Umbrella Investment** for which child investment will be added
- From within the parent investment, click the **Manage Umbrella** icon  from the toolbar. The Manage Consolidated Business Case screen will appear:



By default, *View Investments* screen will appear. The page will be blank when first creating a Parent Investment. However, once investments have been added, the page will show a listing of investments that are assigned to it.

- Click the **Select Child Investments** link.



The Select Investments screen will appear:

Select	Name	Template	OMB Investment Type	Class	Rev.	Point of Contact
<input type="checkbox"/>	Investment A	BY2009	01 - Major Investment	IT	2	User, eCPIC
<input type="checkbox"/>	Investment B	BY2009	01 - Major Investment	IT	2	User, eCPIC
<input type="checkbox"/>	Investment S	BY2009	01 - Major Investment	IT	0	eCPIC, Admin
<input type="checkbox"/>	Investment T	BY2009	01 - Major Investment	IT	0	eCPIC, Admin

The screen will list any investments that are accessible, are in the same template as the parent, and those that are not children of another consolidated business case. All will be available to assign as sub-investments.

5. **Check** the boxes for the investments that will be assigned as children. **Uncheck** the boxes for the investments that will be removed.

Select	Name	Template	OMB Investment Type	Class	Rev.	Point of Contact
<input type="checkbox"/>	Investment A	BY2009	01 - Major Investment	IT	2	User, eCPIC
<input type="checkbox"/>	Investment B	BY2009	01 - Major Investment	IT	2	User, eCPIC
<input checked="" type="checkbox"/>	Investment S	BY2009	01 - Major Investment	IT	0	eCPIC, Admin
<input type="checkbox"/>	Investment T	BY2009	01 - Major Investment	IT	0	eCPIC, Admin

6. Click the **Save** icon  to save the selection(s) and refresh the screen. The user can also choose to click the **View Investment** tab to see a new listing of the investments or click the **Back** arrow  to return to the parent investment.

Note: The user can also get to the View Investment screen by clicking on the ‘Parent’, ‘Child’ or ‘Parent / Child’ link in the Consolidated Business Case column from the Standard View of the Investment List.

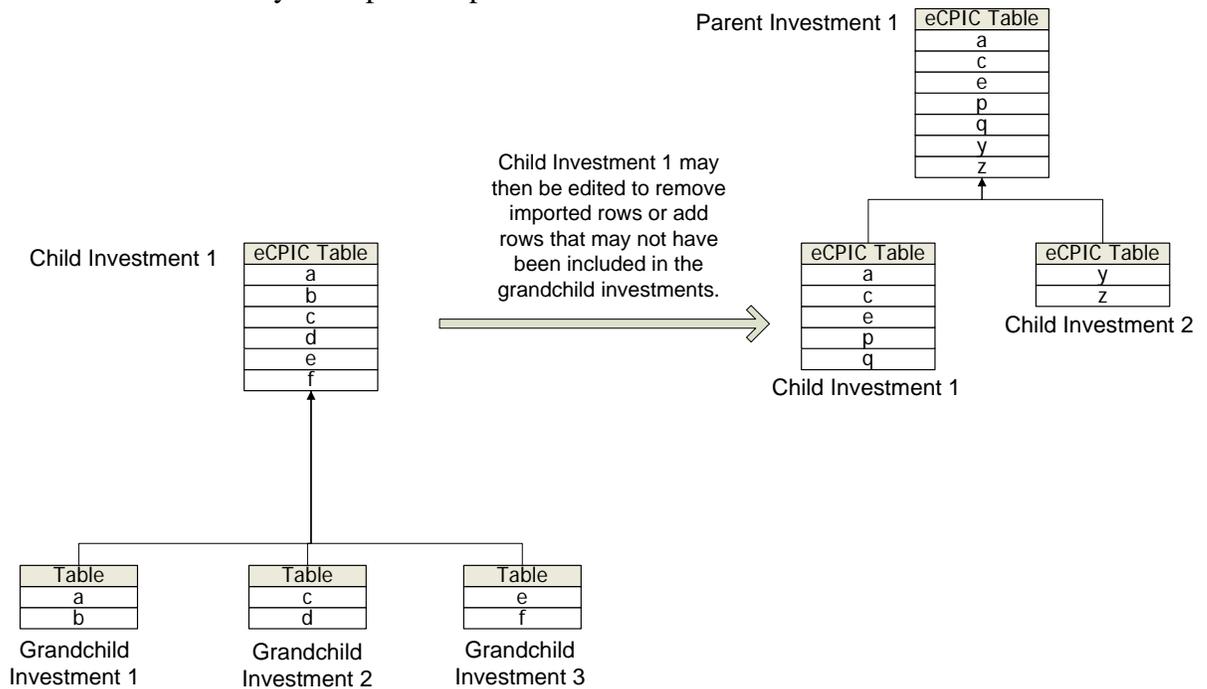
(When placing the mouse over this column, it will highlight a different color than the rest of the columns because clicking on this link will take users to a different screen than the rest of the columns).

4.3.1.1 Consolidated Business Case Table Roll Ups

Consolidated Business Cases aggregate, or roll up, the child data contained in the various tables within the Investments module. Financial tables, including the Summary of Spending, Funding Sources Table and FTE table roll up automatically whenever a child

Investment is updated. The other tables, due to having additional constraints on the data collected, require the Investment Owner to manually initiate the roll up process.

The "Import CBC Child Investment Data for this table" button (), located above eCPIC data table next to the Excel Export icon, merges the rows of current table from all of the CBC's child investments one level below that particular CBC. This functionality is available on all data tables except for the financial tables (SOS, FTE and Funding Source tables) since these automatically rollup on every update to the child. This functionality is also not available on the Performance Baseline tables. It is important to note that the data will import from only one level deep. For instance, if a CBC parent contains a child investment, and that child investment contains a grandchild investment, the grandchild investment data will only roll up to the child investment, and the child investment data will only roll up to the parent investment.



Note: Financial data, such as the data within Summary of Spending, Funding Sources, and FTE Table is automatically rolled up to the parent investment.

4.3.1.1.1 Using the CBC Rollup Functionality

Investment owners for consolidated business cases can use the rollup functionality to quickly import tabular data from child investments into the same table within the CBC. This is not an automatic rollup, so users may make edits to the data which has just been imported into their consolidated investments without fear of these edits being overwritten whenever a child investment is updated.

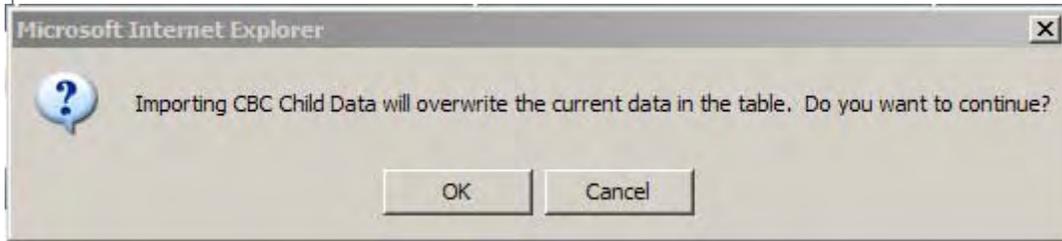
Note: Upon importing child investment data into a consolidated investment, all of the consolidated investment’s current data will be overwritten by the rolled up data for those child investments.

To rollup child data into a table within a CBC:

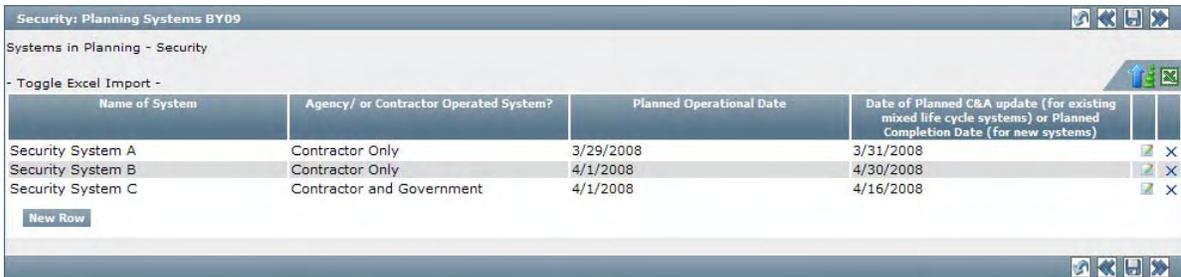
1. From within the CBC, above the table for which the user would like to import child data, click the *Import CBC Child Investment Data for this table* button ()



2. A confirmation message will be displayed: “Importing CBC Child Data will overwrite the current data in the table. Do you want to continue?”



3. Click OK to proceed with the import or Cancel to return to the table without modifying any of the child data.
4. The data table will be updated with an aggregation of the rows from each of the child investments. The table will be automatically saved upon import.



4.3.1.1.2 CBC Rollup Special Cases

The majority of the tables that provide the CBC rollup capability have the same logic of rolling up the child investment data to the parent. The data will roll up to the parent

when the user clicks OK to the confirmation message. Due to OMB reporting restrictions, certain tables have additional logic applied to the imported data:

Table	Additional Logic
Alternatives Table	Only four alternatives may be selected to send to OMB, designated by setting the <i>Send To OMB</i> column as true. Since each child may have 4 alternatives selected as <i>Send To OMB</i> , this could leave a consolidated investment with more than four rows selected as <i>Send To OMB</i> . Therefore, all rows will be imported to the parent with <i>Send To OMB</i> as false. It will be the responsibility of the investment owner to designate which rows should be sent to OMB after the import is complete.
Quantitative Benefits Table	The Quantitative Benefits Table has a fixed number of rows containing both financial columns and text columns for the Investment lifecycle. For this table, the financial columns will rollup as the Sum of each of the child Investment values for a given cell. The text columns will remain unchanged during the import process.

4.3.1.2 Weighted Rollups

There are six fields in eCPIC that capture the percentage of the total spending that is associated with various categories. For non-CBC investments, these fields allow free text decimal input representing the percentage. For CBC investments however, these fields are read-only and the value is a calculated average of the child investments for the respective field. This calculated average is not a standard average, but rather a weighted average that factors in the total spending of each child investment to produce a more accurate percentage. To calculate the percent value for the CBC parent, eCPIC will take the sum of the percentage for each child, multiplied by the total BY spending (SOS Total + FTE Costs for BY), and divide the sum by the total BY spending (SOS Total + FTE Costs for BY) of all of the child investments. Mathematically, this is represented by the equation:

$$CBC\% = \frac{SUM([SOS_Total_BY + FTE_Cost_BY]*[Percent_Value])_{children}}{SUM([SOS_Total_BY + FTE_Cost_BY])_{children}}$$

The following example will walk through calculating the CBC’s value for the field *Provide the Percentage IT Security for the budget year*. Consider a CBC containing two child investments, *Child A* and *Child B*. The values for the relevant fields are listed in the table below:

Investment	Percent IT Security	SOS Total	Total Gov’t FTE Costs
Child A	20	\$500	\$250

Child B	10	\$100	\$50
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The standard average for percentages in this example would be $(10 + 20)/2 = 15\%$. However, this does not take into account that Child A is spending a larger amount of money, and therefore, should carry more “weight” in the CBC average. By using the above equation, we can calculate the weighted average, which factors in the spending:

$$\begin{aligned}
 &= \frac{SUM([SOS_Total_BY + FTE_Cost_BY]*[Percent_Value])_{children}}{SUM([SOS_Total_BY + FTE_Cost_BY])_{children}} \\
 &= \frac{([500 + 250] * 0.20) + ([100 + 50] * 0.10)}{([500 + 250] + [100 + 50])} \\
 &= \frac{165}{900} = 18.33\%
 \end{aligned}$$

The value that will be stored for the CBC investment will be 18.33%. Notice that this value is higher than the standard average, since it is weighted towards the investment that has a larger amount of spending. The table below lists the fields in which this rollup equation applies, as well as the default location in the workflow:

Field Name	Section	Subsection
Provide the Percentage Financial Management for the budget year	I.A: Overview	IT Screening Questions
Provide the Percent Budget Formulation (BF) for the budget year	I.B: Summary of Spending	Funding Questions
Provide the Percent Budget Execution (BE) for the budget year	I.B: Summary of Spending	Funding Questions
Provide the Percentage IT Security for the budget year	I.E: Security and Privacy	Costs and Risks
Provide the Percentage IT Security for the current year	I.E: Security and Privacy	Costs and Risks
Percentage Internet Protocol version 6 (IPv6)	I.E: Security and Privacy	Costs and Risks

Note: The field *Provide the Percentage IT Security for the current year* calculates the rolled up value based upon the CY column of the Summary of Spending, while all other rollups are based upon the BY column.

4.3.1.3 Summed Rollups

The Homeland Security Presidential Directive-12 (HSPD-12) field found on the Exhibit 53 for CBC’s is the simple sum of the child investments. Mathematically, this is represented by the equation:

$$\begin{aligned}
 \text{CBC\$} &= \text{SUM}(\text{HSPD} - 12)_{\text{children}} \\
 &= \text{SUM}(\text{HSPD} - 12)_{\text{children}} \\
 &= (35 + 63 + 107) \\
 &= 205
 \end{aligned}$$

4.3.2 Multi-Level Consolidated Business Cases (CBC)

eCPIC supports multiple levels of Consolidated Business Cases (CBC’s). This means that a consolidated investment can be added as a child investment to another consolidated investments allowing for multiple levels of financial data rollup. In order to avoid double counting for financial data roll-ups, each investment may only be assigned as a child to one parent CBC.

When viewing the investments list from the Investment module, the Parent/Child Status is now displayed. A CBC investment will be listed as “Parent” in the consolidated business case and investments that are children of a CBC will be listed as “Child”. If an investment is a CBC and is also included as a child of another CBC, it will be listed as “Parent / Child”. Clicking on the text in this column will load the Manage CBC page for the selected investment.

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
Investment BY2008	BY2008	IT	01 - Major Investment	Child	0	User, eCPIC	05/17/2007 11:08 AM
Monthly EVMS Example Investment	BY2008	non-IT	01 - Major Investment	Child	3	User, eCPIC	05/17/2007 11:08 AM
CBC Investment A	BY2008	IT	01 - Major Investment	Parent	1	User, eCPIC	05/17/2007 11:06 AM
CBC Investment B	BY2008	IT		Parent / Child	0	User, eCPIC	05/17/2007 11:06 AM
Investment A	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:18 AM
Investment B	BY2008	IT	01 - Major Investment		0	eCPIC, Admin	05/16/2007 12:45 AM
Investment C	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM
Investment D	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM

4.3.2.1 Creating a Multi-Level CBC

Creating a Multi-Level CBC is similar to creating a regular CBC Investment. Now, when users create a new Parent Investment, they will now be able to view and select a CBC from the Select Child Investments list.

- Show Field Filter -

View Child Investments [Select Child Investments] Manage Consolidated Business Case

Select	Name	Template	OMB Investment Type	Class	Rev.	Point of Contact
<input type="checkbox"/>	Demo Investment 1	BY2008	01 - Major Investment	IT	1	eCPIC, Admin
<input type="checkbox"/>	Demo Investment 2	BY2008	01 - Major Investment	IT	1	eCPIC, Admin
<input checked="" type="checkbox"/>	CBC Investment B	BY2008	01 - Major Investment	IT	1	User, eCPIC
<input type="checkbox"/>	Investment A	BY2008	01 - Major Investment	IT	1	User, eCPIC
<input type="checkbox"/>	Investment B	BY2008	01 - Major Investment	IT	1	User, eCPIC

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4.3.2.2 CBC Parent Investment Views

1. Click on the *Parent* link in the Consolidated Business Case column

- 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
Investment BY2008	BY2008	IT	01 - Major Investment	Child	0	User, eCPIC	05/17/2007 11:08 AM
Monthly EVMS Example Investment	BY2008	non-IT	01 - Major Investment	Child	3	User, eCPIC	05/17/2007 11:08 AM
CBC Investment A	BY2008	IT	01 - Major Investment	Parent	1	User, eCPIC	05/17/2007 11:06 AM
CBC Investment B	BY2008	IT	01 - Major Investment	Parent / Child	0	User, eCPIC	05/17/2007 11:06 AM
Investment A	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:18 AM
Investment B	BY2008	IT	01 - Major Investment		0	eCPIC, Admin	05/16/2007 12:45 AM
Investment C	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM
Investment D	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM

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2. This page will show the Child Investment(s) of the CBC. Clicking on the Child Investment Name will navigate the user to that particular investment.

Logged in as: eCPIC, End User My Profile Log out

Navigation Standard View CBC Example Investment 0

eCPIC v4.4

[View Child Investments] Select Child Investments List Consolidated Business Case Child Investments

Child Investment Name	Template	OMB Investment Type	Consolidated Business Case	Class	Rev.	Point of Contact
Example Investment BY2010	BY2010	01 - Major Investment	Child	IT	0	eCPIC, End User

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4.3.2.3 Parent/Child Investment Views

1. Click on the *Parent/Child* link in the Consolidated Business Case Column

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
Investment BY2008	BY2008	IT	01 - Major Investment	Child	0	User, eCPIC	05/17/2007 11:08 AM
Monthly EVMS Example Investment	BY2008	non-IT	01 - Major Investment	Child	3	User, eCPIC	05/17/2007 11:08 AM
CBC Investment A	BY2008	IT	01 - Major Investment	Parent	1	User, eCPIC	05/17/2007 11:06 AM
CBC Investment B	BY2008	IT		Parent / Child	0	User, eCPIC	05/17/2007 11:06 AM
Investment A	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:18 AM
Investment B	BY2008	IT	01 - Major Investment		0	eCPIC, Admin	05/16/2007 12:45 AM
Investment C	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM
Investment D	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM

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- This page will show the Child Investment(s) and its Parent Investment. This view will only appear if the child is a child of another CBC while also a CBC itself.

Parent Investment Name	Template	OMB Investment Type	Class	Rev.	Point of Contact
CBC Investment A	BY2008	01 - Major Investment	IT	1	User, eCPIC

Child Investment Name	Template	OMB Investment Type	Class	Rev.	Point of Contact
Investment BY2008	BY2008	01 - Major Investment	IT	0	User, eCPIC
Monthly EVMS Example Investment	BY2008	01 - Major Investment	non-IT	3	User, eCPIC

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4.3.2.4 CBC Child Investment Views

- Click on the *Child* link within the Consolidated Business Case column.

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
Investment BY2008	BY2008	IT	01 - Major Investment	Child	0	User, eCPIC	05/17/2007 11:08 AM
Monthly EVMS Example Investment	BY2008	non-IT	01 - Major Investment	Child	3	User, eCPIC	05/17/2007 11:08 AM
CBC Investment A	BY2008	IT	01 - Major Investment	Parent	1	User, eCPIC	05/17/2007 11:06 AM
CBC Investment B	BY2008	IT		Parent / Child	0	User, eCPIC	05/17/2007 11:06 AM
Investment A	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:18 AM
Investment B	BY2008	IT	01 - Major Investment		0	eCPIC, Admin	05/16/2007 12:45 AM
Investment C	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM
Investment D	BY2008	IT	01 - Major Investment		1	User, eCPIC	05/16/2007 11:22 AM

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- This page will display the Parent Investment

Parent Investment Name	Template	OMB Investment Type	Class	Rev.	Point of Contact
CBC Investment B	BY2008		IT	0	User, eCPIC

Note: If an investment is part of a multi-level Consolidated Business Case, it will only display its Parent Investment one level above it in the CBC hierarchy.

4.3.2.5 Consolidated Business Case Parent Field

This field, “Consolidated Business Case Parent Investment”, lists the name of the CBC parent investment. Additionally, users can click on the name of the Parent Investment and they will be taken directly to that investment. This provides quick navigation to the parent consolidated investment.

Note: This field will only be displayed if the investment is a child of a Consolidated Business Case.

The screenshot shows the 'Investment: Example Investment BY2010' form. The 'Consolidated Business Case Parent Investment(s)' field is highlighted with a red box and contains the text 'CBC Example Investment'. Other fields include 'Template Name' (BY2010), 'Is this investment a consolidated business case?' (No), 'Investment Name' (Example Investment BY2010), 'Point of Contact' (eCPIC, End User), and 'Class' (non-IT).

4.3.3 Setting up Multiple Consolidation CBC's

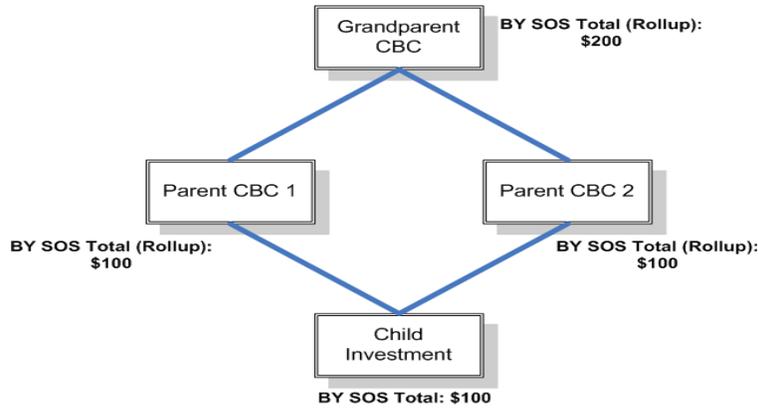
Multiple Consolidation of an investment to CBC's is set up by adding the same investment to two or more Consolidated Business cases. Once this has been done, and changes to the financial data in the child investment will be rolled up to both parent investments. Below is a screen shot of the Select Child Investments page. Two investments, *CBC Parent Investment 1* and *CBC Parent Investment 2*, investments have the same investment, *CBC Child 2*, selected as a child.

[View Child Investments] Select Child Investments		Template
CBC Child 1	BY2009	
CBC Child 2	BY2009	

[View Child Investments] Select Child Investments		Template
CBC Child 2	BY2009	
CBC Child 3	BY2009	

4.3.3.1 Multiple Consolidation and Double Counting of Financials

When setting up Multiple Consolidation Investment hierarchies, users must realize that certain situations may result in double counting of financial data. Take the following setup (illustrated below) for example: *Grandparent CBC* has two children, *Parent CBC 1* and *Parent CBC 2*, both of which have *Child Investment* as a child.

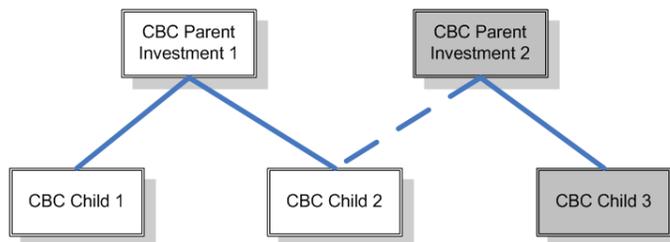


A user enters \$100 of Spending into the BY column of the Summary of Spending of *Child Investment*. Once the user saves the values, the \$100 will roll up to each of the parents, making *Parent CBC 1* and *Parent CBC 2* both \$100. The two parent investments will then roll up to *Grandparent CBC*, which will then have a value of \$200. This means that an entry of \$100 will be counted twice at the grandparent level. Users defining Multiple Consolidation setups will need to be aware of this to avoid double counting situations.

4.3.4 Revising CBCs with Multiple Consolidation

Upon revision of a CBC, the user is presented with two options, to revise the CBC but not revise its children, which will break the CBC relationship, or to revise the investment and all child investments. If the first option is chosen, the revision functionality will work as it currently does within eCPIC, where the investment is revised, but the children are not revised and the CBC relationship is removed. If the option to revise the child investments is selected, then the initial CBC is revised, as are all of the child investments. If any of the child investments is a CBC, then its children will also be revised recursively. If at any point in this process a child investment contains multiple parent investments, then the relationship to the parents that are not being revised will be broken. This is done in order to main avoid duplicative revisions to children investments.

The diagram below shows an example. In this scenario, there are two CBC Investments, *CBC Investment 1* and *CBC Investment 2*. *CBC Investment 1* has two children, *CBC Child 1* and *CBC Child 2*. *CBC Investment 2* also has two children, *CBC Child 3* and *CBC Child 2*, which it shares with *CBC Investment 1*.



If *CBC Parent Investment 1* is revised, then *CBC Child 1* and *CBC Child 2* would also be revised as children of the CBC being revised. *CBC Parent Investment 2* and *CBC Child 3* would not be revised. The link between *CBC Parent Investment 2* and *CBC Child 2*, represented by the dashed line, since *CBC Child 2* has multiple parents, one of which is being revised.

When preparing to revise a CBC, a report is displayed on the Investment Revision Page that will tell the user what Parent/Child links will be broken as a result of this revision. Below is an example of that report. The report is exportable to Excel, allowing the user to output the information if reestablishing the links are necessary after the revision is complete.

Parent Investment	Child Investment
CBC Parent Investment 2	CBC Child 2

Note: It is recommended that, after revising a CBC and breaking investment linkages for a parent investment, the listed investments be revised as necessary prior to reestablishing the link. This will avoid the unnecessary creation of duplicative revisions of investments.

4.4 Using Investment Views

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.