

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

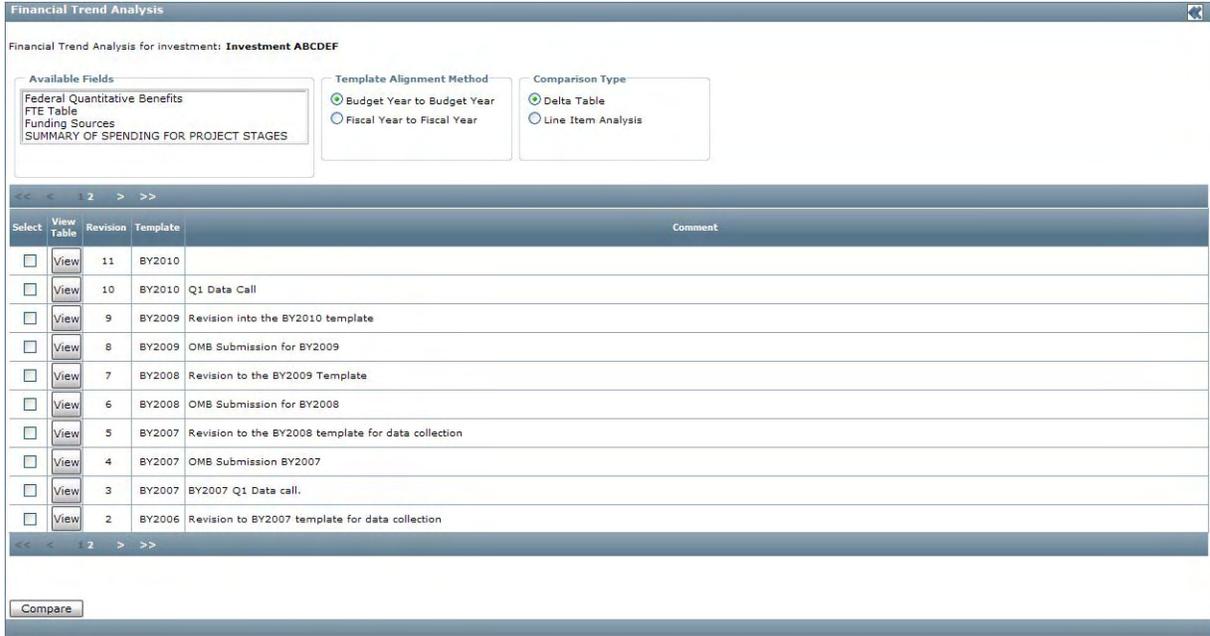
4.11 Financial trend analysis

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

4.11.1 Opening the Financial Trend Analysis Tool

To open the Financial Trend Analysis Tool:

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

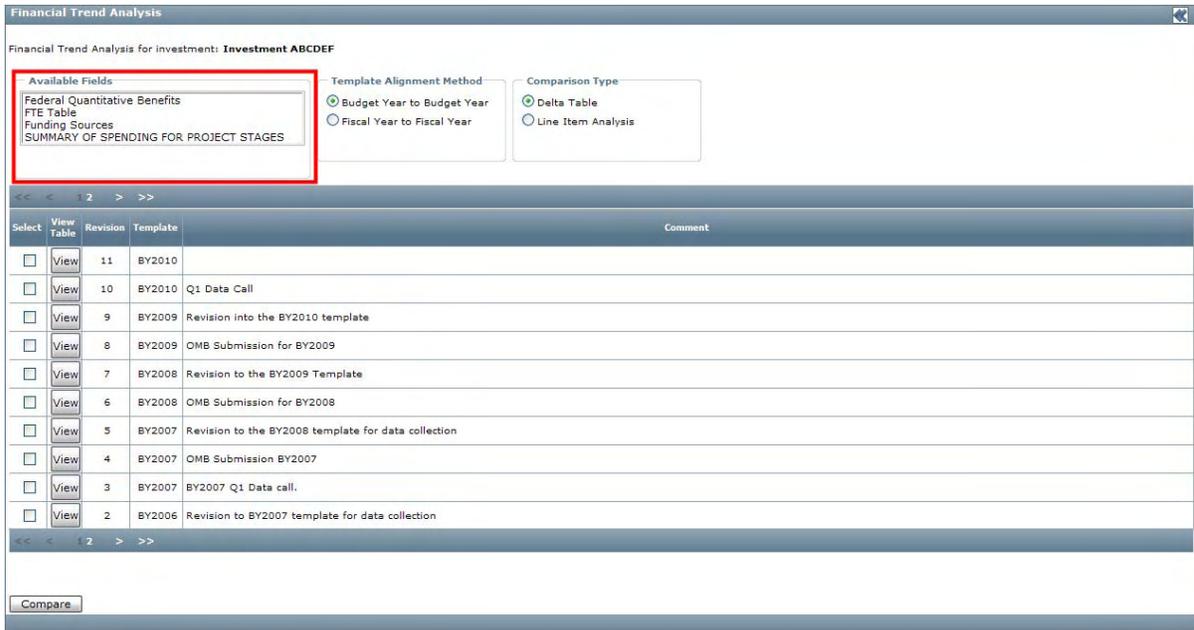


The Analysis Tool displays a list of available fields for comparison, options for comparison views, as well as a list of the investment revisions.

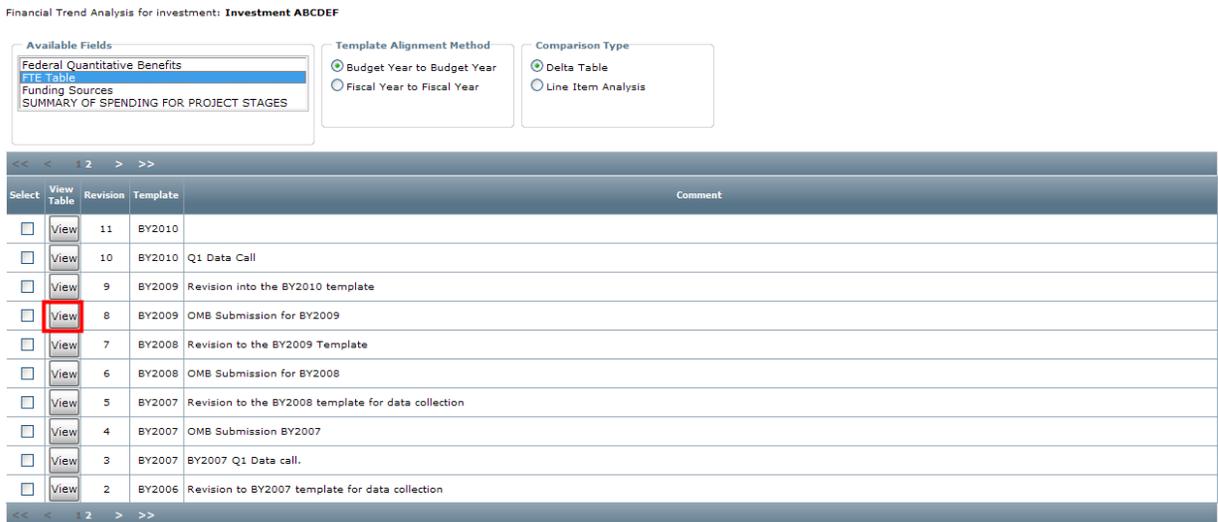
4.11.2 Analyzing a Single Revision of a Financial Table

Through the Analysis Tool, users can analyze a single revision of a financial table by manipulating the grouping and filter features of that table. This provides direct access to the actual data for a specific revision without having to navigate back to that revision. To analyze a single revision of a particular financial table:

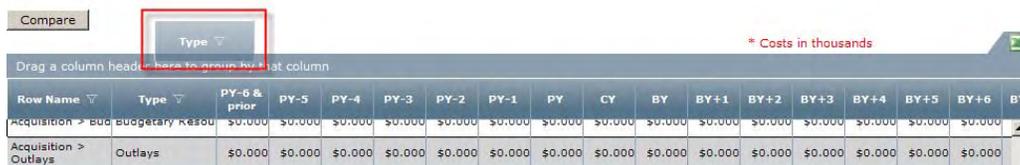
1. From within the Analysis Tool, select the appropriate table to be analyzed by clicking the table name in the **Available Fields** window



2. Click the **View** button next to the revision of the table to be analyzed



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



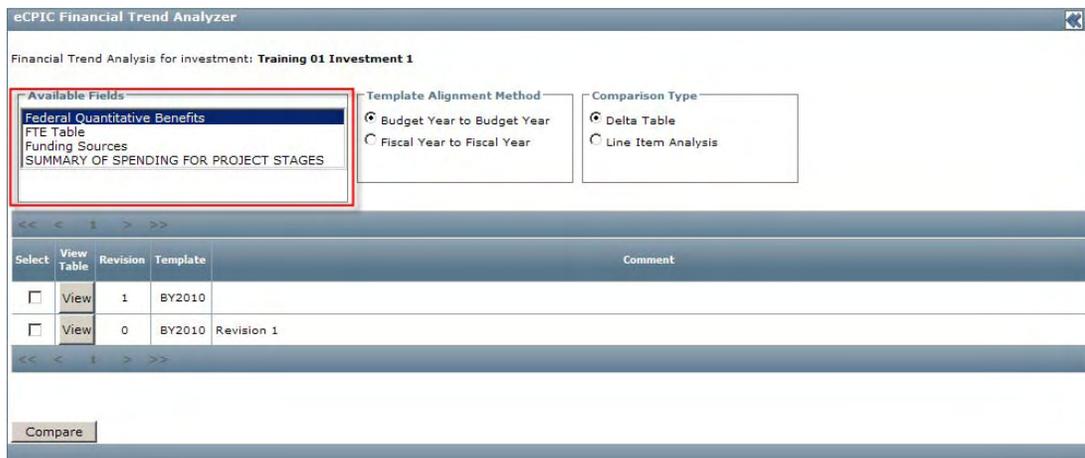
- When a table has been grouped by a particular column header, click the (📁) **sort** icon next to the column header name to alternate between an ascending and a descending sort
- Click the (⌵) **filter** icon next to a column header name to open the filter window for that column. Selecting one of the options in the filter window will filter the table accordingly. Only column headers with useful filtering functionality will display the filter icon.



4.11.3 Comparing Multiple Revisions of a Financial Table

The Financial Trend Analysis tool can also compare a particular financial table across multiple investment revisions. The page allows users to view different alignments of the lifecycle costs as well as multiple comparison types in an analysis. To compare a financial table across multiple revisions:

- From within the Financial Trend Analysis page, select the appropriate field to be analyzed by clicking the table name in the **Available Fields** window

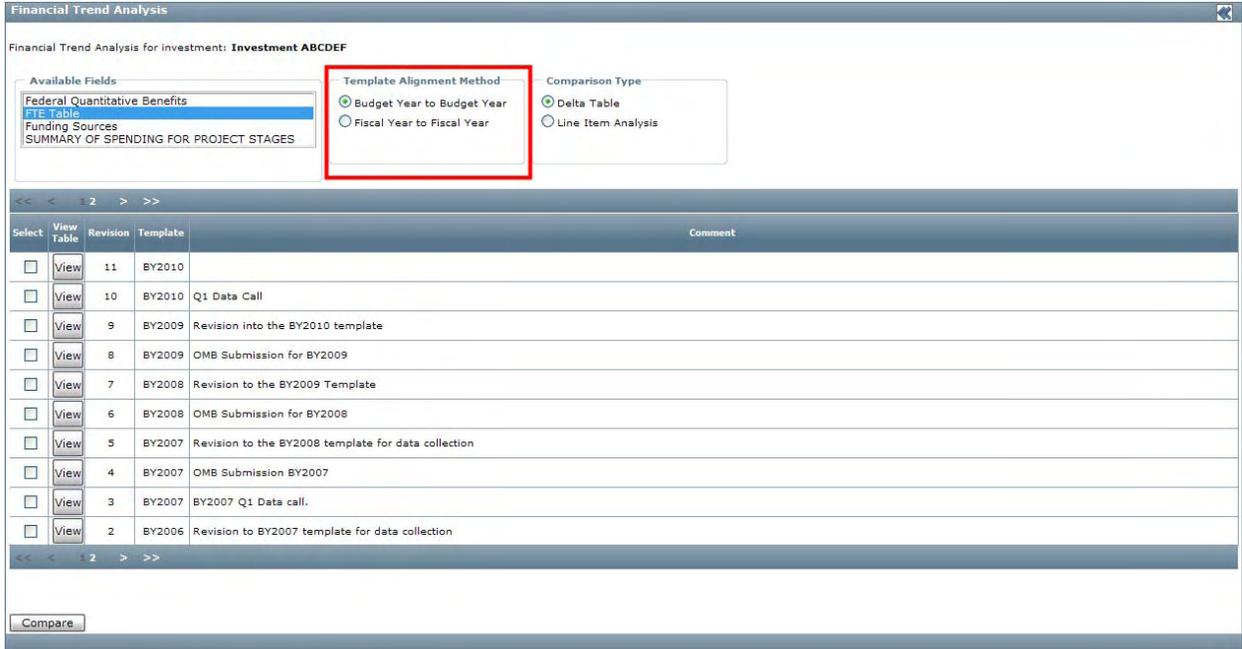


- Select one of the two **Template Alignment Methods**. The alignment method options include:

- Budget Year to Budget Year:** This alignment method will compare the data between revisions by using the “BY...” nomenclature (i.e.—“BY+2” in one

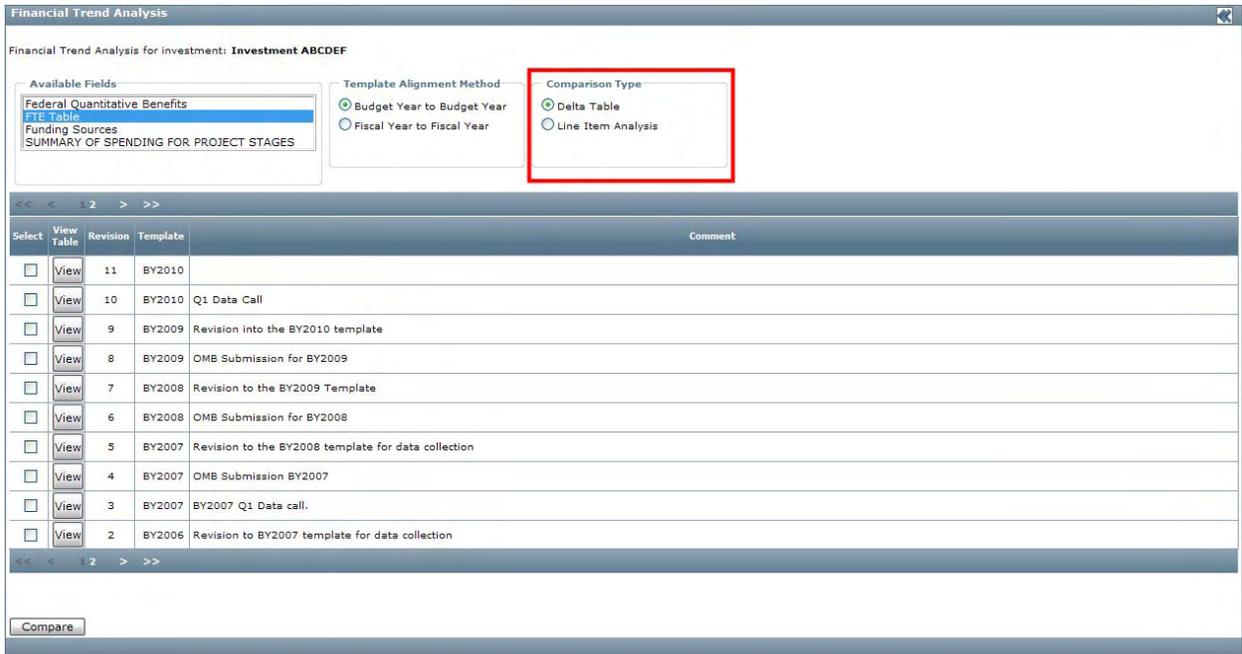
revision against “BY+2” in another revision, regardless of the template year for that revision).

- **Fiscal Year to Fiscal Year:** This alignment method will compare the data between revisions by using calendar fiscal years (i.e.—FY2009 in one revision against FY2009 in another revision, even though that fiscal year might be considered “BY+2” in one revision and “PY” in another revision).

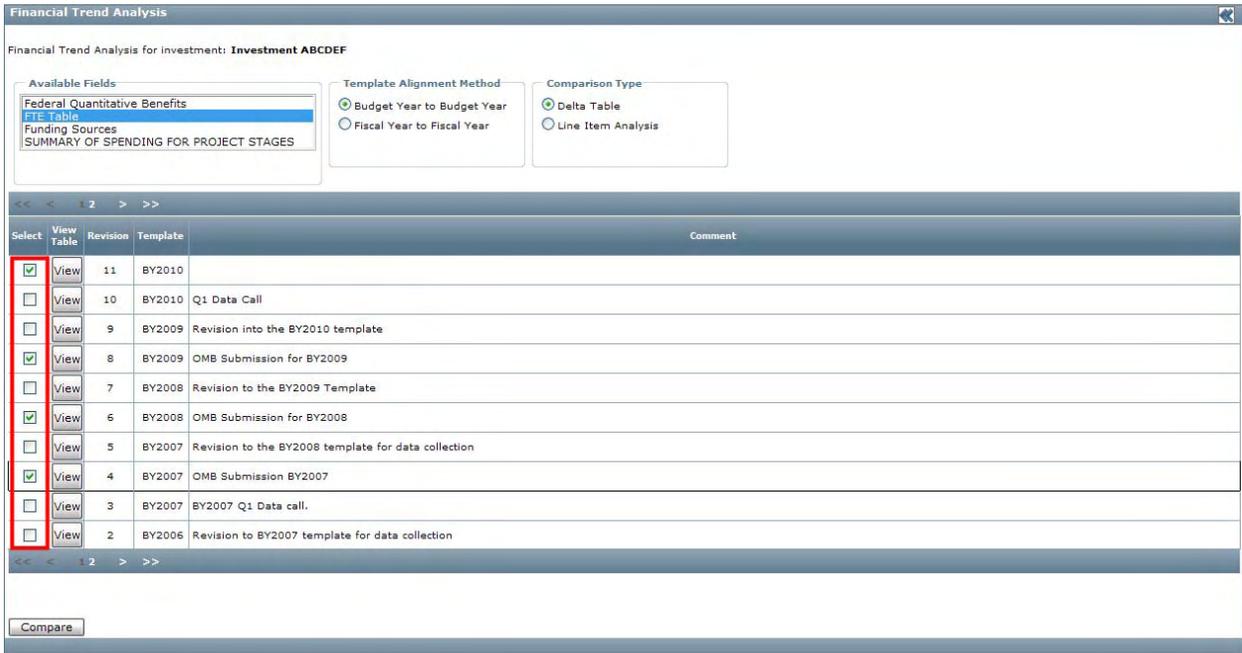


3. Select one of the two **Comparison Types**. The comparison type options include:

- **Delta Table:** This comparison type will show the delta, or difference, between the earliest and the latest revisions selected for each cell of the table.
- **Line Item Analysis:** This comparison type will show the delta or difference between the earliest and the latest revisions selected as well as the individual data points for each of the selected revisions.



4. Use the **checkboxes** in the Revision list to select which revisions to compare



5. Click the **Compare** button to display the financial analysis

Compare

* Costs in thousands

Drag a column header here to group by that column

Row Name	PY-6 & prior	PY-5	PY-4	PY-3	PY-2	PY-1	PY	CY	BY	BY+1	BY+2	BY+3	BY+4	BY+5	BY+6	BY+7	BY+8 & beyond	Total
Security	0	0	0	0	1	1	1	1	0.5	0.5	0	0	0	0	0	0	0	5
IT	0	0	1	1	1	2	2	2	5	4	3	1	1	0	0	0	0	25
Financial Management	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Program Management	0	0	1	1	1	1	1	1	1	1	1	1	1	0	0	0	0	11
Other	0	0	0	0	0	0	0	0	0	0	0	1	1	1	0	0	0	3
Total*	0	0	2	2	3	4	4	4	6.5	5.5	4	3	3	1	0	0	0	44

6. Drag any column header into the space marked **Drag column header here** to group the analysis table by that particular column header
7. When a table has been grouped by a particular column header, click the  **sort** icon next to the column header name to alternate between an ascending and a descending sort
8. Click the  **filter** icon next to a column header name to open the filter window for that column. Selecting one of the options in the filter window will filter the table accordingly. Only column headers with useful filtering functionality will display the filter icon.

4.11.4 Exporting the Financial Analysis Table

Tables from the Financial Trend Analysis tool can be exported to Microsoft 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.

4.12 Investment Review Screen

The Review Investment function allows users to see what sections are complete or incomplete. This function works for all datagrids. A datagrid will display a value of complete if one row or one cell has been completed in the table.

1. From within the investment to be reviewed, click on the **Review Investment icon** .

The screen will refresh to show an outline of the sections and sub-sections that make up a given process. Each section and sub-section name is a link to that area of the Process' data entry forms. The Process Summary screen will appear:

Process Summary		
Name	Complete	Incomplete
Exhibit 300 BY09	67	145
Initiative Definition BY09	1	0
Initiative Definition BY09	1	0
I.A: Overview BY09	32	27
Descriptive Information BY09	14	1
Screening Questions BY09	8	15
IT Screening Questions BY09	10	11
I.B: Summary of Spending BY09	2	7
Summary of Spending BY09	1	1
Full Time Equivalents BY09	0	1
Funding Questions BY09	0	5
Funding Sources BY09	1	0
I.C: Acquisition/ Contract Strategy BY09	1	7
Contract/Task Order Table BY09	0	1
Contract/Task Order Questions BY09	1	6
I.D: Performance Information BY09	1	0
Performance Information BY09	1	0
I.E: Security and Privacy BY09	3	12
Costs & Risks BY09	1	6
Security: Planning Systems BY09	0	1
Security: Operational Systems BY09	2	1
Security: Weaknesses & Contractor Procedures BY09	2	3
Privacy: Planning & Operational Systems BY09	0	1
I.F: Enterprise Architecture (EA) BY09	3	13
General EA Questions (EA) BY09	0	8
FEA SRM BY09	1	0
FEA TRM BY09	1	0
Reuse & Information Sharing BY09	1	5
FEA Primary Mapping BY09	1	0
II.A: Alternatives Analysis BY09	1	9
Analysis Background BY09	0	4
Alternatives Table BY09	1	0
Selected Alternative BY09	0	2
Legacy System BY09	0	3
II.B: Risk Management BY09	1	7
Risk Management Plan BY09	1	6
Investment Risks BY09	0	1
II.C: Cost and Schedule Performance BY09	13	15
Earned Value BY09	6	4
Earned Value BY09	6	3
Cost/Schedule Variance BY09	0	5
Performance Baseline BY09	1	3
III.A: Risk Management BY09	1	6
Risk Management Plan BY09	1	6
III.B: Cost and Schedule Performance BY09	0	6
Operational Analysis BY09	0	4
Performance Baseline BY09	0	2
IV.A: Multi-Agency Collaboration Oversight BY09	1	13
Stakeholders BY09	0	1
Partner Capital Assets BY09	0	1
Partner Funding BY09	0	1
Analysis Background BY09	0	4
Alternatives Table BY09	1	0
Selected Alternative BY09	0	2
Quantitative Benefits BY09	0	1
Legacy System BY09	0	3
IV.B: Risk Management BY09	1	7
Risk Management Plan BY09	1	6
Investment Risks BY09	0	1
IV.C: Cost and Schedule Performance BY09	6	16
Earned Value BY09	6	7
Cost/Schedule Variance BY09	0	5
Performance Baseline BY09	0	4

The **Complete** column shows the number of fields in each section or sub-section that contain data.

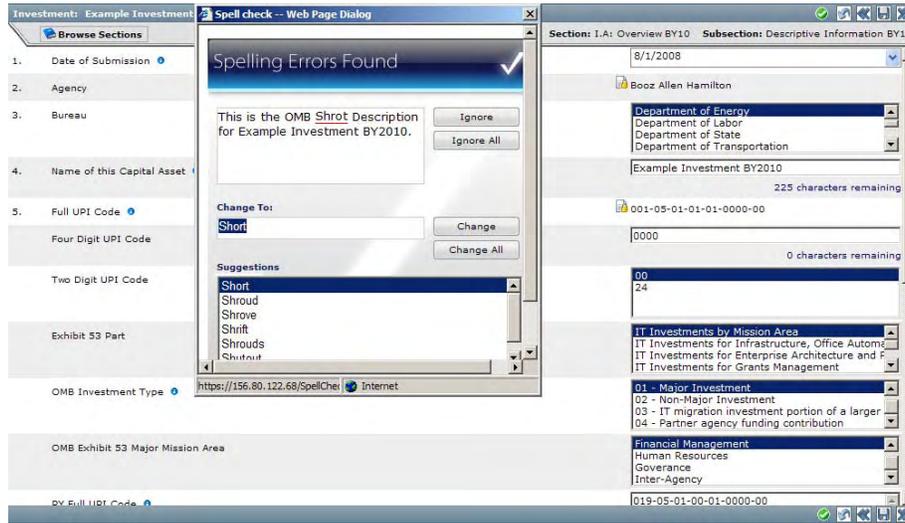
The **Incomplete** column shows the number of fields in each section or sub-section that do not contain data.

4.13 Spell Check

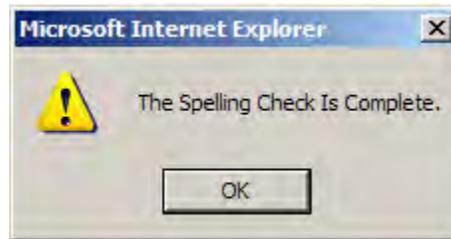
The **Spell Check** function in eCPIC allows users to check the spelling for a page or within specific text fields.

Note: This Spell Check will not work within Rich Text Areas or text boxes within a datagrid. While spell checking is not currently available within datagrid text boxes, Rich Text Areas have their own Spell Check function.

1. To check the spelling for a specific field, click inside the textbox or text area of a data entry form and then click the **Spell Check** icon (✓).
2. If errors were found, users will see a pop-up window highlighting the misspelled word with suggested replacements below. Click the **Ignore/Ignore All** or **Change/Change All** buttons, as necessary, for each misspelled word found.



3. A pop-up will display when once the spell check has been completed.



4. Click **OK** to close the window.
5. If no errors were found, the spell check window will not be displayed.
6. Click **Finish** when spell check has been completed to close the pop-up window.

Note: Users can spell check an entire page by clicking the **Spell Check** icon. In addition, if checking the spelling in a Rationale box from within a Scoresheet in the Scoring module, the spell checker will begin checking for all misspelled words within the Rationale boxes for that Scoresheet.

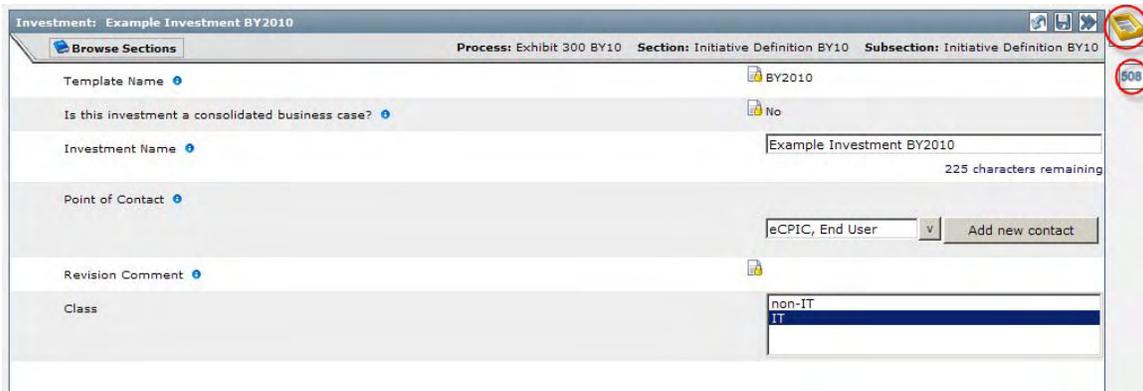
4.14 Investment Resources

eCPIC provides a **Resource Library** that allows users to access and download reference materials from anywhere in the application, including the Home Page. Users can add a resource to the Resource Library, make it **Public** or **Private**, and link it to Resource Categories or Investments.

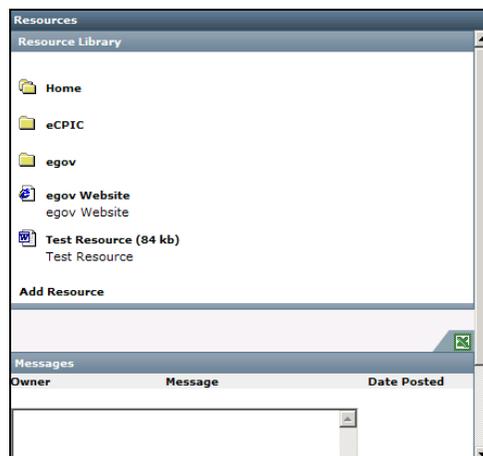
4.14.1 Accessing Investment Resources

To Access Investment Resources from within an investment:

1. Click on the **Toggle Resource List** icon (📁). The Resource List icon will appear on the side of the investment. There will also be the (508) icon.

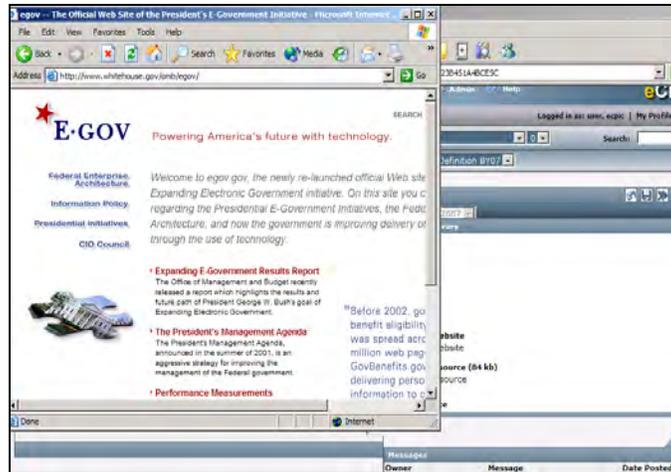


2. Mouse over either icon to show the **Resource Library** and investment **Messages**. The **Resource Library** window contains a list of Resources that relate specifically to the investment.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window they can release the click from the icon. *Click on the icon or outside the box to close the pop-up window.* If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. *Click on the 508 icon again to close the window.* This will show both the Resource Library and 508 icons once again.

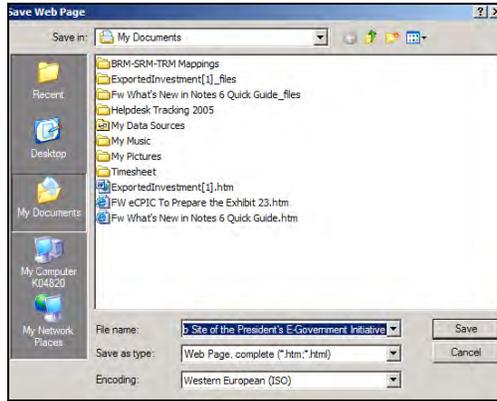
3. Click on a **Resource Title** to open the resource in a separate browser window. The browser window can be resized and kept open as users continue to review or edit the investment data.



4. From the address bar in the new window, highlight the **Name** of the file.
5. Click on **File**.
6. Select **Save As**.



A File download or Save Web Page screen will appear:

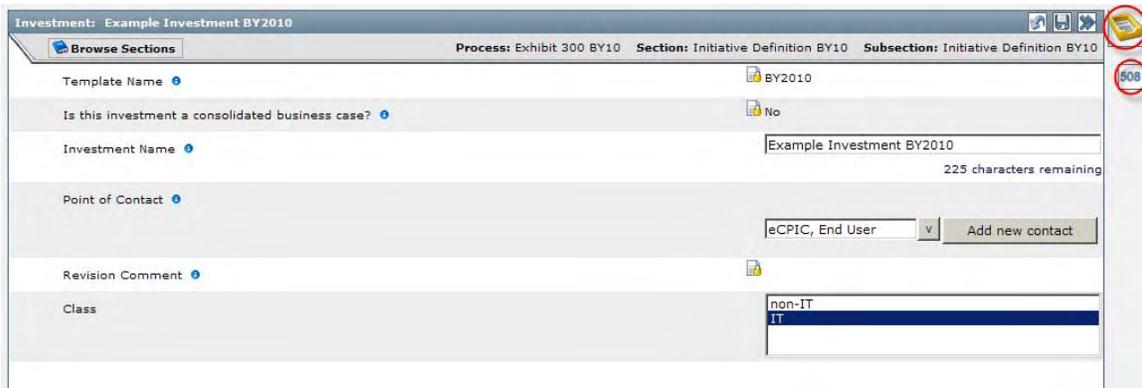


7. Select the location that to save the file and name the file.
8. Click **Save** to save the document.

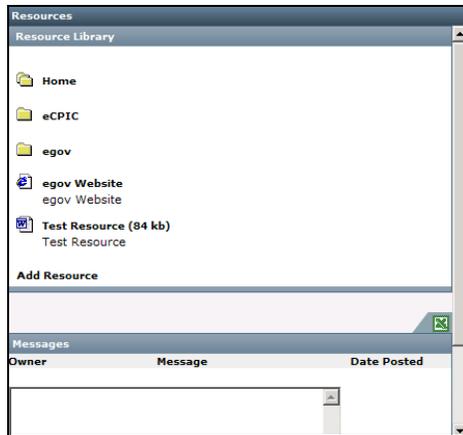
4.14.2 Adding Investment Resource

If users have ‘Create’ RIGHTS for the Resource Library, they will be able to add Resources to the Investment Resource Library.

1. From within the investment, for which a resource will be added, click on the **Toggle Resource List** icon (📁). The Resource List icon will appear on the side of the investment. There will also be an **508** icon.

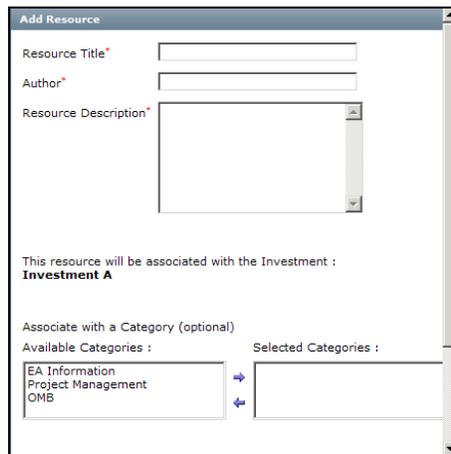


2. Place the mouse over the Resource Library icon to show the **Resource Library** and investment **Messages**. The **Resource Library** window contains a list of Resources that relate specifically to the investment.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. *Click on the icon or outside the box to close the pop-up window. If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. Click on the 508 icon again to close the window. This will show both the Resource Library and 508 icons once again.*

3. In the Resource Library window, click **Add Resource**. The Add Resource form will appear:

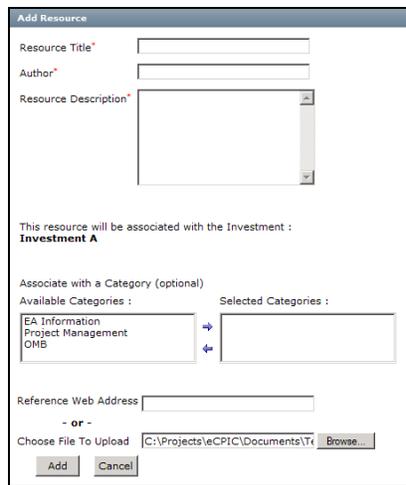


4. In the **Add Resource** form, enter the Title, Author, and Description.
5. If there are Resources Categories available, users will see them listed in the 'Available Category' box. They can associate the Resource with a category by highlighting the specific category and clicking the → arrow to move it to the 'Selected Category' box.

To remove a category from the ‘Selected Category’, highlight the category and click on the  arrow to move it back in the ‘Available Category’ box.

Note: Holding ‘Shift’ while selecting categories will highlight multiple categories at one time in the order which they are listed. Holding ‘Ctrl’ while selecting names, will allow users to highlight a category and select other categories that may not be in order.

6. If adding a Web link, enter the address in the ‘Reference Web Address’ field. *(Don’t forget to add the http:// to the beginning of the link).*
7. If adding a document, click **Browse** and navigate to find the appropriate file.



8. After all information is complete, click **Add**.

The Resource will now be associated with the investment and any Category specified.

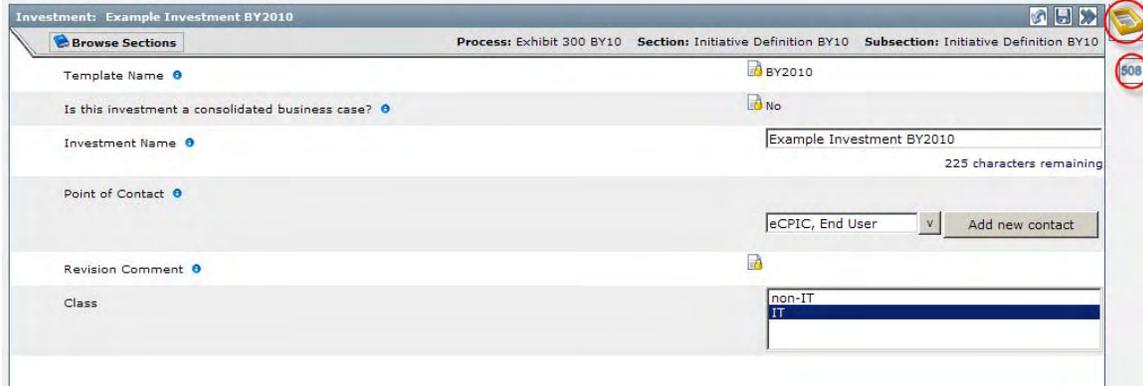
4.15 Investment Resource Messages

Within any investment (*assuming the user has access to the Resource Library*), they also have the ability to post and delete messages through the **Toggle Resource List** icon (). The messages are investment specific and will be viewable to all users that have access to the respective investment **Resource Library**. The intent of messaging is to allow correspondence about an investment to be centralized inside of eCPIC.

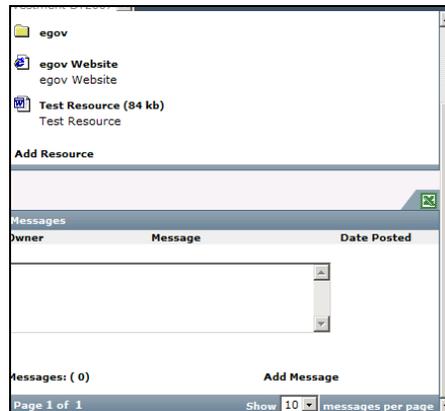
4.15.1 Creating a Resource Message

To Create a Resource Message:

1. From the Investments module, click on the **Investment Name** for which a message will be added.
2. Once inside the investment, click on the **Toggle Resource List** icon (📁). The Resource List icon will appear on the side of the investment. There will also be an  icon.

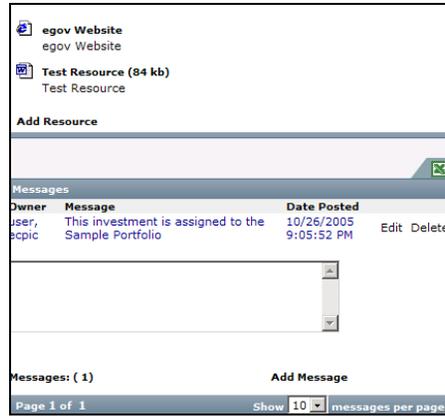


3. Move the mouse over the Resource Library icon to view the **Resource Library** and an investment **Messages** field.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. *Click on the icon or outside the box to close the pop-up window.* If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. *Click on the 508 icon again to close the window.* This will show both the Resource Library and 508 icons once again.

4. Within the **Messages** field, type in the message that will appear with the investment. *Be advised there is a 500 character limit.*
5. Click **Add Message**.



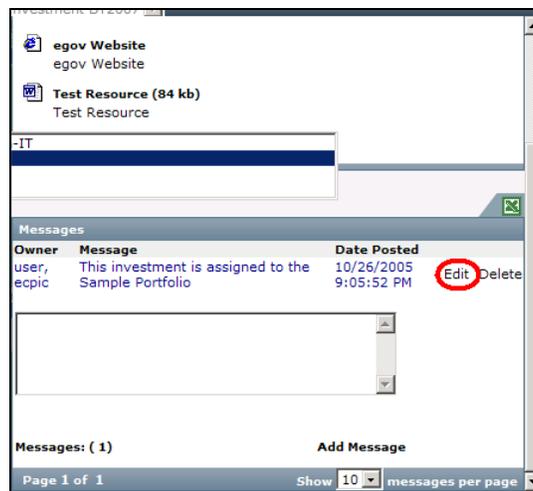
The Owner of the message, the Date and Time the message was posted, and the actual message will appear. The number of messages associated with the investment will also appear.

When other users click on the **Toggle Resource List** icon (📁), they will be able to view all messages associated with the specific investment.

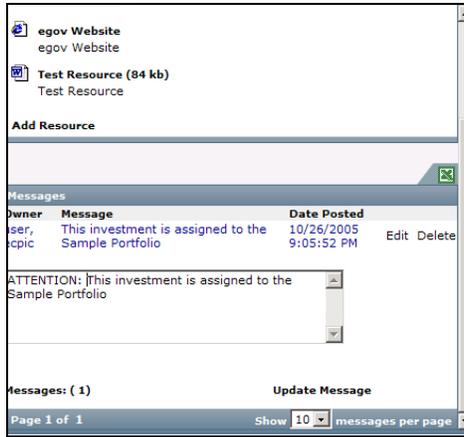
4.15.2 Editing a Resource Message

Only the System Administrator and the Owner of a message have the ability to **Edit** a message.

1. From the **Message** Field, click the **Edit** link next to the message that is to be edited.



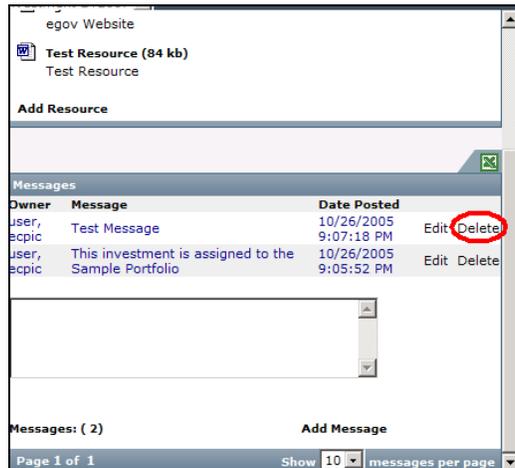
2. Make appropriate changes.
3. Click **Update Message**. The message will be updated with changes.



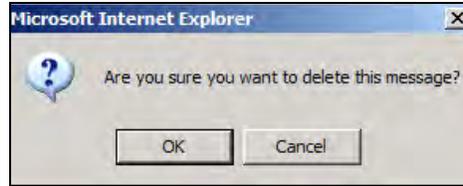
4.15.3 Deleting a Resource Message

Only the System Administrator and the Owner of a message have the ability to **Delete** a message.

1. From the **Message** Field, click the **Delete** link next to the message that is to be deleted.



2. Confirm that the message should be deleted. Select **OK**.



The window will refresh and the message will be deleted.

4.16 *Inline Scoring*

Within the Investments module, users with scoring privileges will be able to score their investments in a streamlined fashion. This provides the ability to view the investment fields while scoring. In order to activate the scoring pane, users can click the **Toggle Scoring Pane** icon ().

Similar to the investment workflow, users will then be able to input scoring data while navigating through the processes, sections, and sub-sections. When a user is in a particular Process, Section and Sub-Section in the Investment Workflow, they will be able to toggle the Scoring icon for the different Scoresheets and grade the fields that have been created relating to that area. This allows for easy navigation between different Scoresheets based upon user and group access.

Note: A scorer will have to be familiar with the fields in the Scorecard Workflow that relate to each Section and/or Subsection of a Process.

1. Click on the **Investment** module.
2. Click on the **Investment Name** that is to be scored.
3. From within the investment, click on the **Toggle Scoring Pane** icon (). The Toggle Scoring pane icon will appear on the side of the investment. There will also be an  icon.