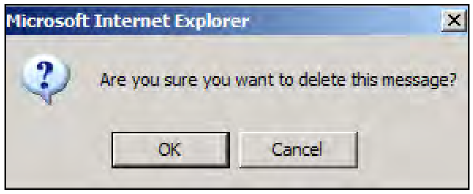


The window will refresh and the message will be deleted.

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 ( ).

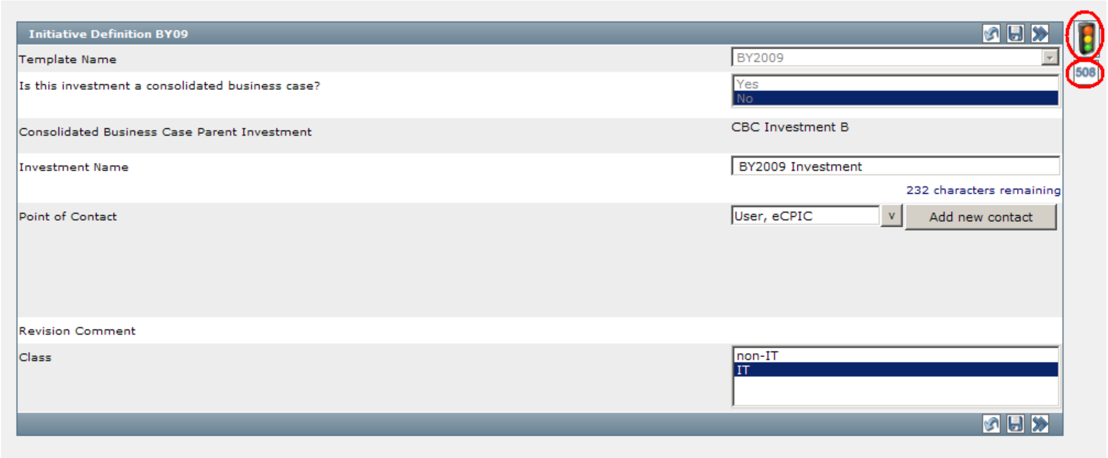
Similar to the investment workflow, users will then be able to input scoring data while navigating through the processes, sections, and sub-sections. When a user is in a particular Process, Section and Sub-Section in the Investment Workflow, they will be able to toggle the Scoring icon for the different 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.

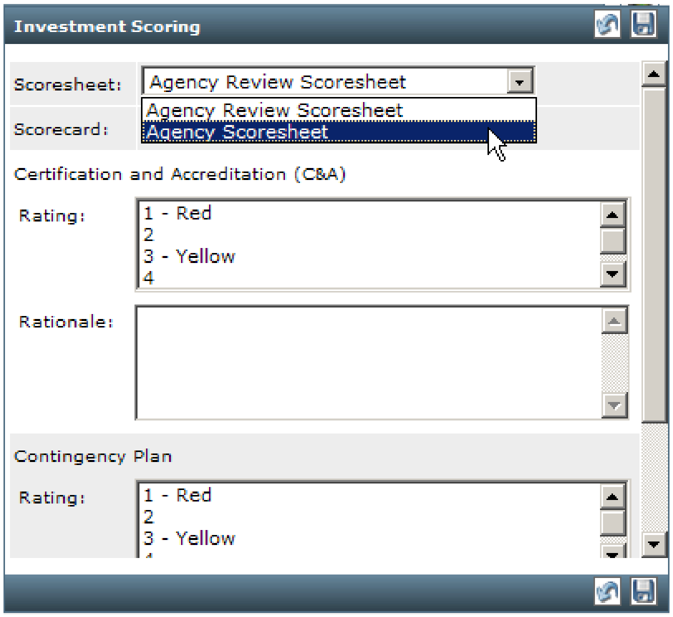
1. Click on the **Investment** module.

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.

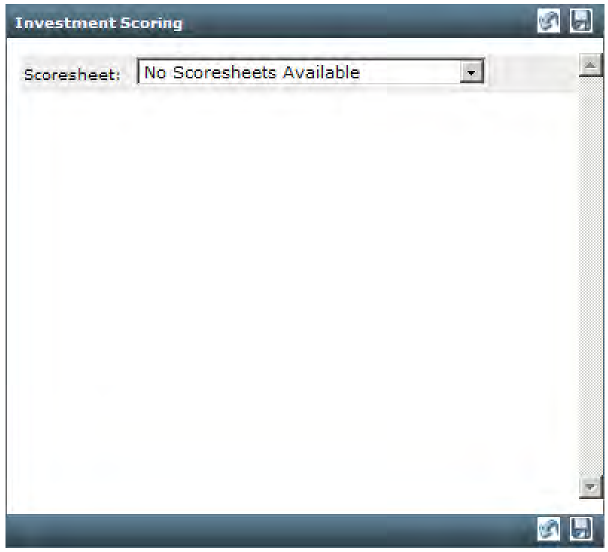


4. Mouse over the Toggle Scoring Pane icon to view the scoring pane. Within the pane, a drop-down list of Scoresheets will be available based upon user and group access.



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.**

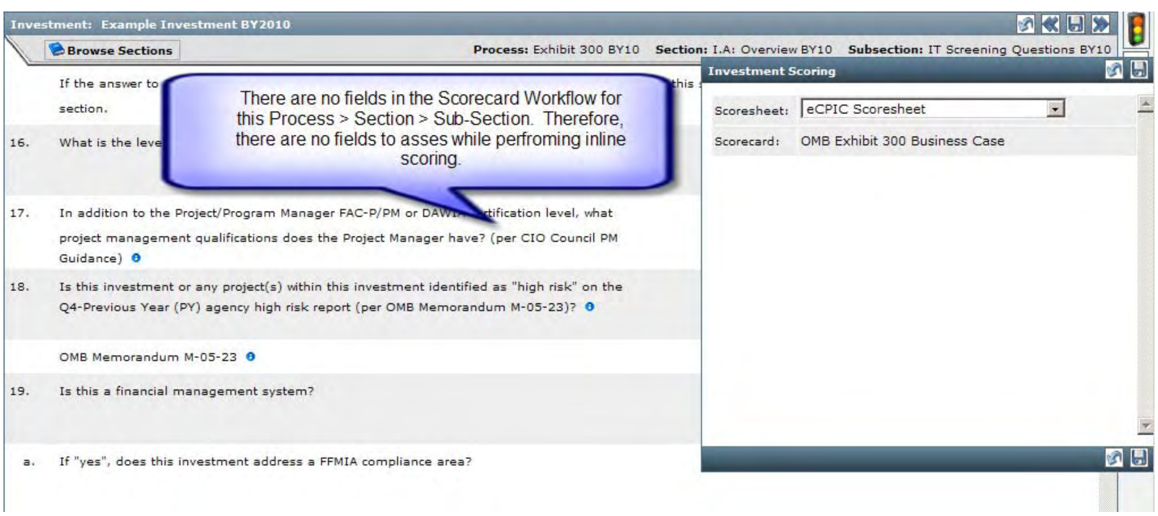
If there are no Scoresheets available, the box will state this.

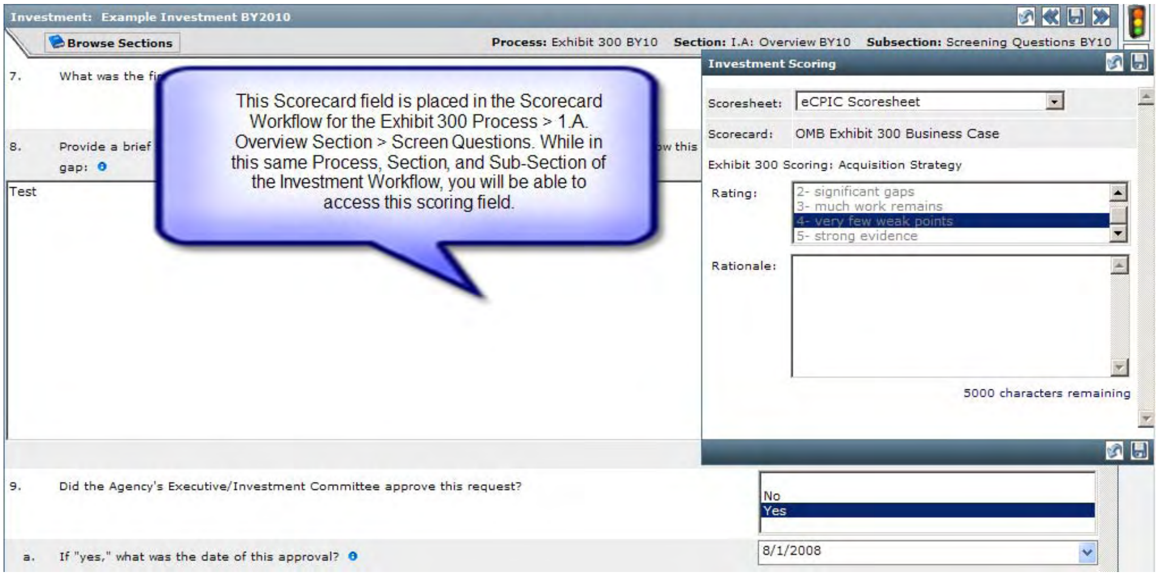


5. From the drop-down list, select the **Scoresheet** to be accessed.

Once the Scoresheet has been selected, the fields relating to the Scoresheet will appear:

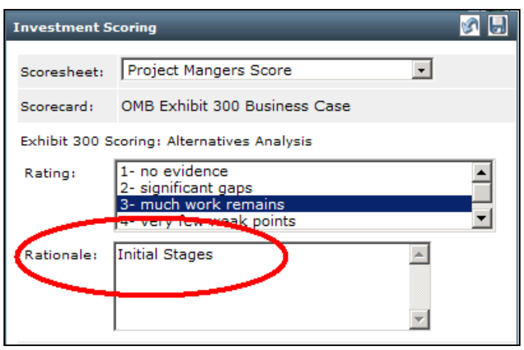
Note: If the System Administrator has not assigned any fields to assess against to the Section and Sub-Section that they are in, there will be no scoresheet fields listed. Once they are in the correct Section and Sub-Section in which there are scoring fields assigned, then only the fields that are associated with the Section and Sub-Section that they are in will be displayed. All other fields will not be displayed until they are in the appropriate Section and Sub-Section.





6. For each field related to the Section and Sub-Section, select or enter the score that the field should be given.

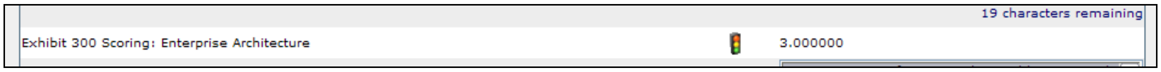
Note: The Rationale box is available to enter any comments to justify the score. The Rationale box accepts up 5000 characters and if needed, users can select to use the Zoom and/or the Spell Check feature.



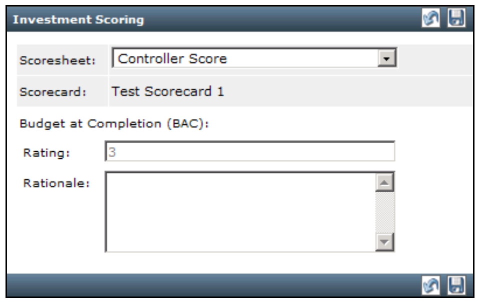
7. Click **Save** to save data or **Undo** to cancel data entered.

Note: If there is a field in the Investment Workflow that is also part of a Scorecard and not set to 'Auto Score' in the Scorecard, that field will be disabled within the Investment Workflow. There will be a message in the Investment module saying that the field is being scored.

For example, the field below is in both the Investment Workflow and the Scorecard Workflow (*and not set to Auto Score*). From within the Investment Workflow, the field is disabled.



Note: Auto Score fields will be disabled in the scoring pane. From within the Scoresheet, any parent or 'Auto Score' field will populate with the data from the children fields or the data entered in Investment Workflow respectively.



Note: The 'Budget at Completion (BAC)' field was set to Auto Score. Once the field was populated in the Investment Workflow, it will automatically be scored

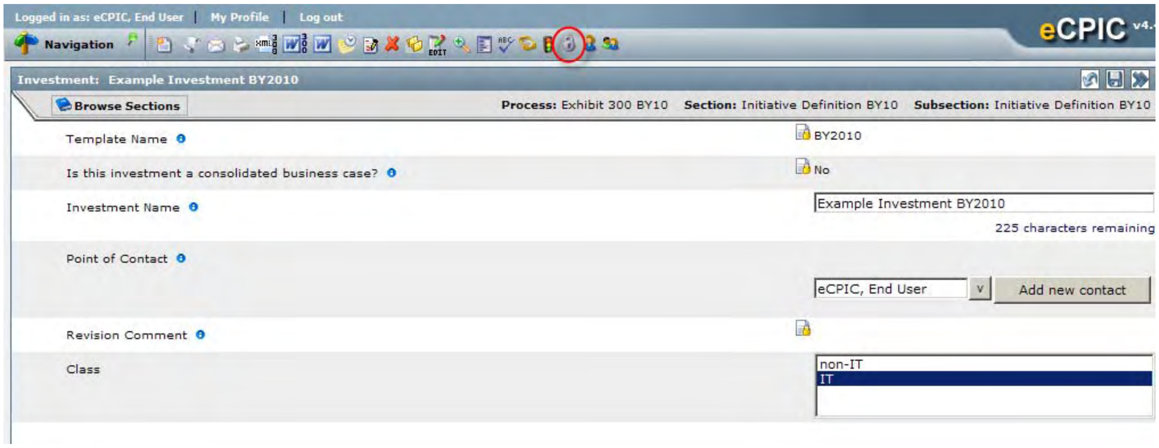
4.17 Lock/Unlock Investments

Locking an investment allows users to keep other users from being able to 'edit' it while working on it. Once the Investment is locked, only the user and the System Administrator can unlock the investment. Other users will still be able to view the investment while it is locked, but they will not be able to make edits.

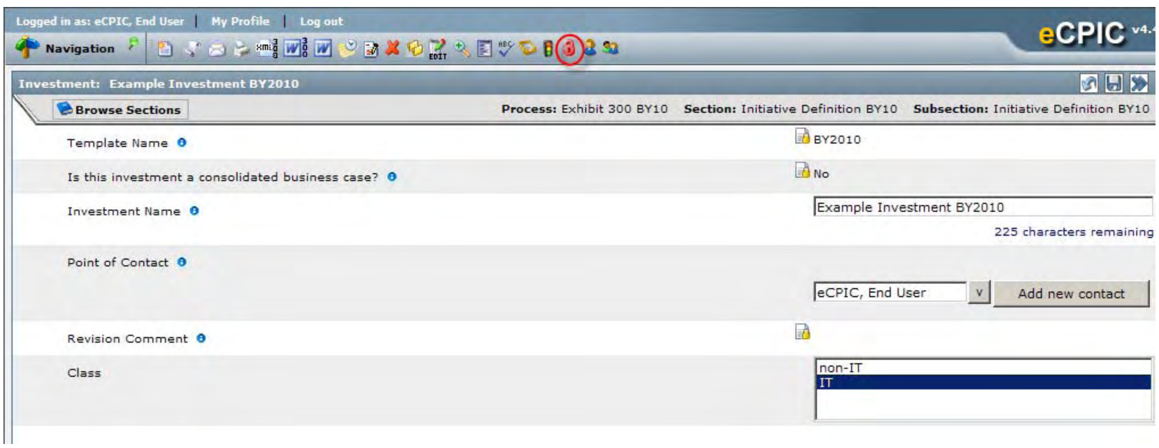
4.17.1 Locking Investments

To Lock an Investment:

1. If an investment is currently unlocked, then the **Unlock** icon will show. To lock an investment, click on the **Unlock** icon ( ).



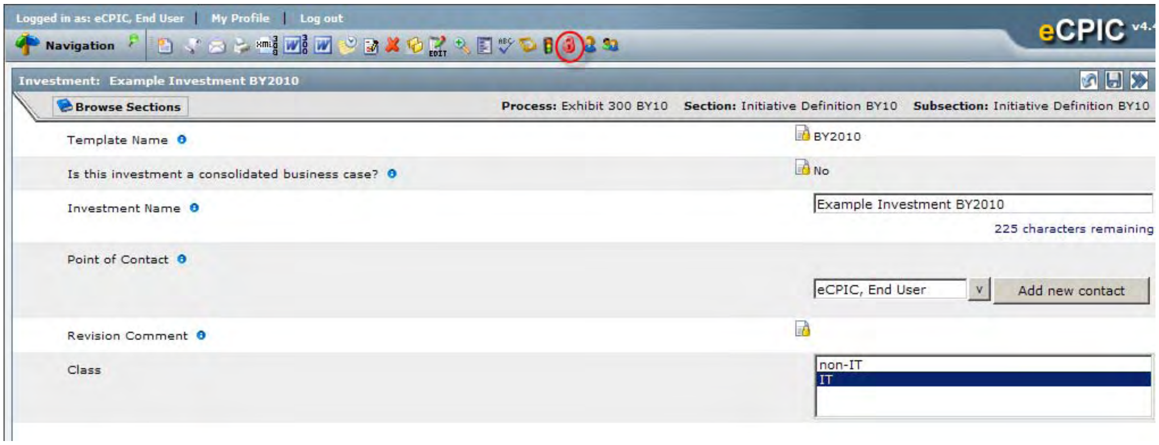
The **Locked** icon will appear. This will lock the investment and make it unavailable for editing by other users.



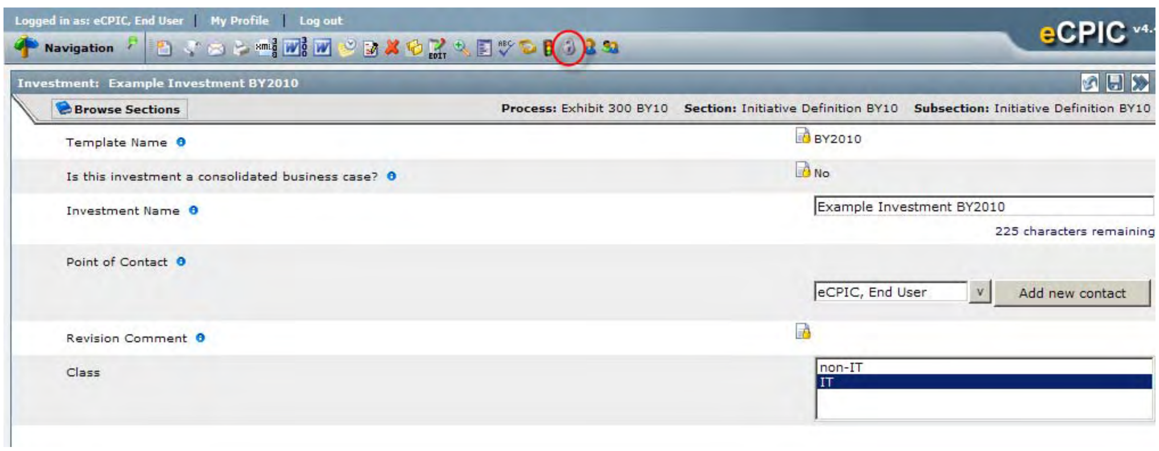
4.17.2 Unlocking Investments

Only the user who locked the investment and the System Administrator can unlock a locked investment.

1. From anywhere within a locked Investment, click the **Locked** icon ( ).



The **Unlock** icon will appear. This will unlock the investment and make it available for editing by other users.



4.18 Assigning User and Group Permissions

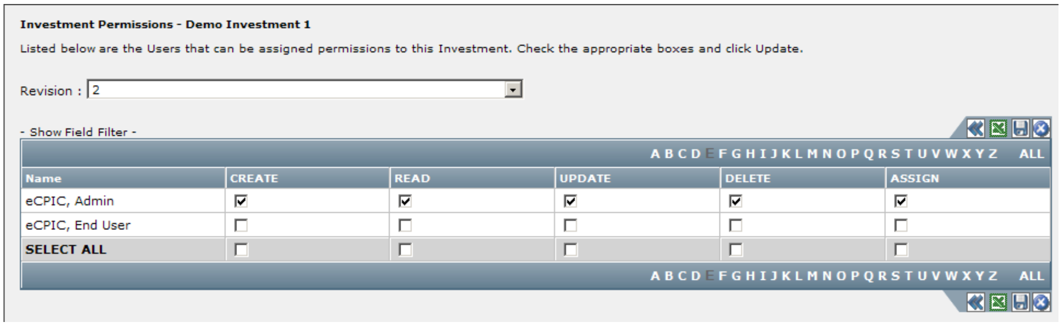
If users possess the ‘Assign Permissions’ RIGHTS to the Investments module or ‘Assign Permissions’ PERMISSIONS to a specific investment, they will see the **User** and **Group Permissions** icons in the investments toolbar. These icons are used to launch the forms that allow users to grant or deny access to the investment.

Note: When users create a new investment, they are automatically granted all permissions to it. This includes ‘Create’, ‘Read’, ‘Update’, ‘Delete’ and ‘Assign Permissions’ access.

4.18.1 Assigning User Permissions

To Assign User Permissions for an Investment:

1. From within the investment that users will Assign Permissions, click on the **User Permissions** icon ( ). The Investment Permissions screen will appear:



The form displays user names and checkboxes for each type of access to the investment. (*Create, Read, Update, Delete, Assign Permissions*).

2. **Check** the boxes that correspond to the level of access users wish to grant. If the intent is to deny access to a user that is currently able to access the investment, then **Uncheck** the box. Users can also check the **Select All** checkbox to select all the users on one page at once.

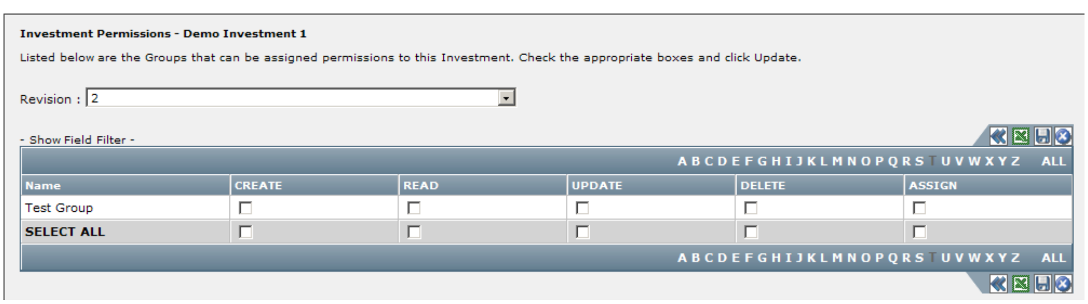
3. Click **Update** to save changes before changing screens (*or moving to the next page of users*).

Note: Users can use the Revision drop-down to Assign Permissions to specific Revisions of the investment. Investment PERMISSIONS carry over between Revisions, but explicit PERMISSIONS will need to be set in order to retroactively add user access.

4.18.2 Assigning Group Permissions

To Assign Group Permissions for an Investment:

1. From within the investment that users will Assign Permissions, click on the **Group Permissions** icon ( ). The Investment Permissions screen will appear:



The form displays group names and checkboxes for each type of access to the investment. (*Create, Read, Update, Delete, Assign Permissions*).

2. **Check** the boxes that correspond to the level of access users wish to grant. If the intent is to deny access to a group that is currently able to access the investment, then **Uncheck** the box. Users can also check the **Select All** checkbox to select all the groups on one page at once.

3. Click **Update** to save changes before changing screens (*or moving to the next page of groups*).

Note: Users can use the Revision drop-down to Assign Permissions to specific Revisions of the investment. Investment PERMISSIONS carry over between Revisions, but explicit PERMISSIONS will need to be set in order to retroactively add group access.

4.19 Investments Module Tables

Within the investments module, there are several data collection fields that allow users to input tabular data. eCPIC provides two ways of interfacing with these tables including an Inline Mode and a Classic Mode.

4.19.1 Table Interface User Settings

For users who wish to update their preference for editing eCPIC datagrids, a user option setting is available to update the users' default setting within the system. The Classic interface features the Row Edit Template controls always visible below the table and a single edit button for each row.