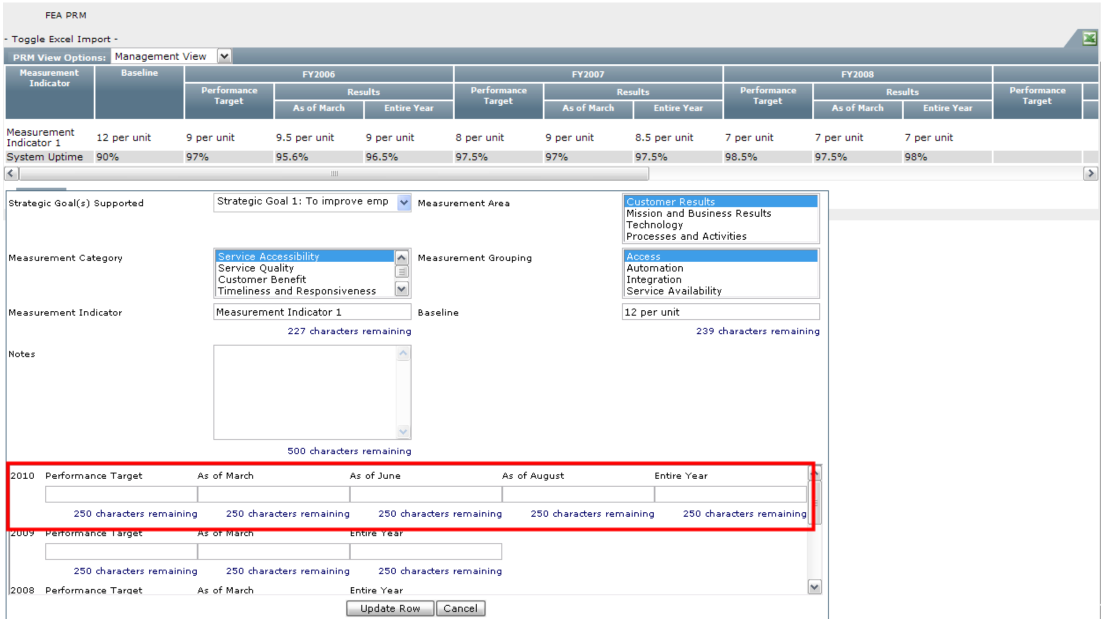


3. Click the **Update Row** button to save the data into the table

4.20 Other Data Tables and Fields in eCPIC

eCPIC also includes other datagrids that are not part of the OMB structure. However, these datagrids are important to the life of the investment and have been incorporated so that agencies have the flexibility needed to manage each of their investments.

4.20.1 FEA Primary Mapping Field

The FEA Primary Mapping field is located in the sub-section of section I.F: Enterprise Architecture (EA) section within the Exhibit 300 process. This table is used to determine if the investments primary mapping will map to the SRM or the BRM within the Exhibit 53.

When the FEA Primary Mapping field is accessed for the very first time by a user, before data has been entered and assuming the data has not been imported into the investment from a revision, only the table headings will be visible.

4.20.1.1 Assign a FEA Primary Mapping

To assign a FEA Primary Mapping:

1. From within the FEA Primary Mapping select if the investment should map to the BRM or the SRM.

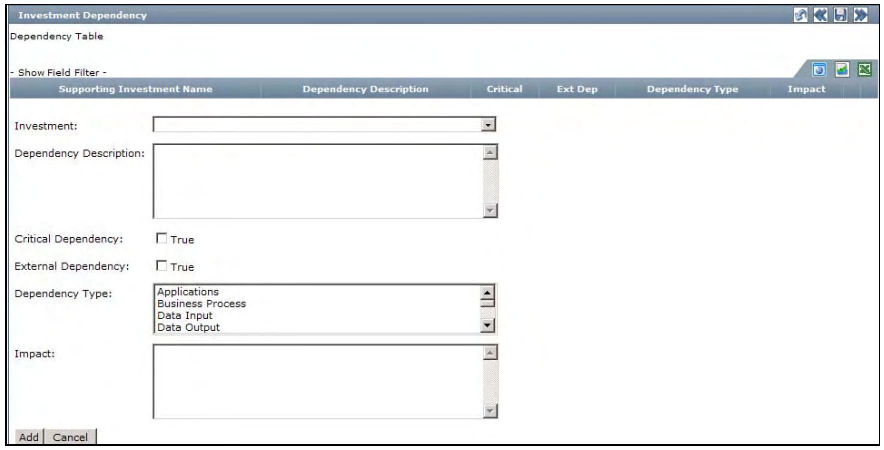
Once a selection is made within each field, the all other fields will change and the selections for each will populate. After all selections have been made, the Primary Mapping Code will be dynamically generated.

4.20.2 Investment Dependency Table

The purpose of the **Investment Dependency** table is to capture relationships between investments. Relationships between investments can be established as either Supporting (input) Investments or Dependent (output) Investments. All investments can be either supporting, dependent, or they can act as both types. For the active or the current investment, the dependency table displays all Supporting (input) Investments. The table will show the Supporting Investment Name, Dependency Description, Critical Dependency, External Dependency, the Dependency Type, and the Impact.

Note: This table must be added into the Investment Workflow by the System Administrator. The System Administrator will place the table wherever the Agency deems necessary.

When the **Investment Dependency** table is entered for the very first time by a user, prior to inputting data, only the table headers will be displayed as no relationships have been created.



4.20.2.1 Add Investment Relationship

1. From within the investment for which users would like to add an Investment Relationship, navigate to the section and sub-section that contain the Investment Dependency Table.

2. Click on the **Investment drop-down** box to select an investment. The investment selected will be the investment that will be listed as a Supporting/Input Investment (*it supports the current investment*). All investments listed within the drop-down box are part of the eCPIC application.

3. Enter in a **Dependency Description**. Enter a description of the relationship between the two investments. List the agencies, laws, rules and regulations related to the dependency if this is an External Dependency.

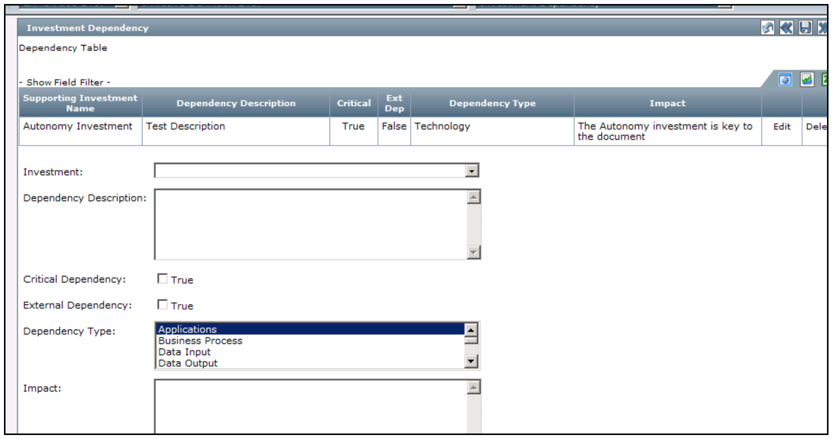
4. For the Critical checkbox, **Check** or **Uncheck** the box if the relationship is critical. By default, the box is unchecked.

5. For the External Dependency, **Check** or **Uncheck** the box if the relationship is based upon an external dependency. By default, the box is unchecked.

6. In the **Dependency Type** box, select the type(s) relationship you are inputting. *Dependency Types are configured by the System Administrator*.

7. In the Impact box, please explain the consequences of archiving the Supporting/Input Investment and any data replacement strategies if the Supporting Investment was no longer available to this current investment.

8. Once all information has been entered, click the **Add** button.



The Supporting/Input Investment will be added to the Dependency Table. The above example shows that the *Documentation Investment* is supported by, or receives input from the *Autonomy Investment.*

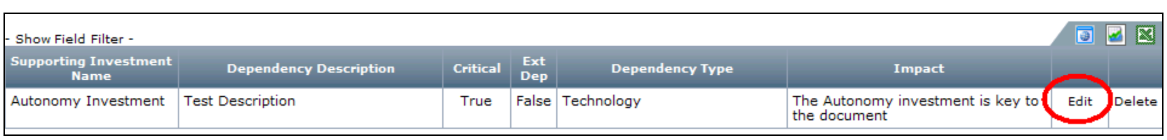
Note: If the *Autonomy Investment* was revised and the name was changed, then the new investment name would automatically be reflected in the Dependency Table. This also applies to the reports that can be generated to show the relationships.

All data in the table can be exported to Excel by clicking on the icon, and exported to Word by clicking on the icon.

4.20.2.2 Edit an Investment Relationship

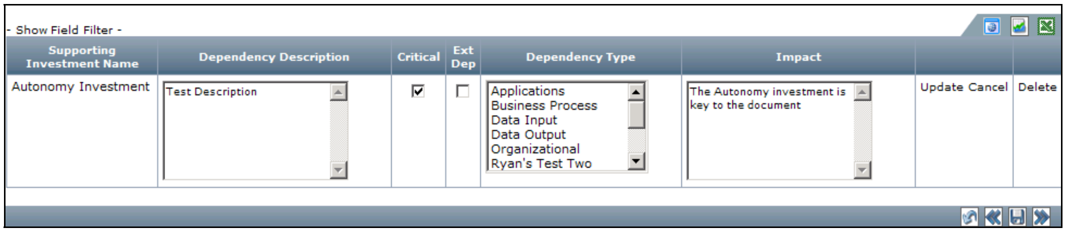
To Edit an Investment Relationship:

1. Click the **Edit** link for the specific Supporting/Input Investment that will be edited. This will return the results of the selected row in the data entry form.



2. Update all information as necessary.

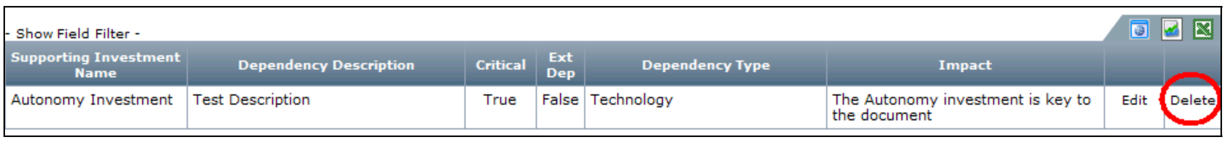
3. Click the **Update** button. If users do not want to undo any changes entered, click the **Cancel** button.



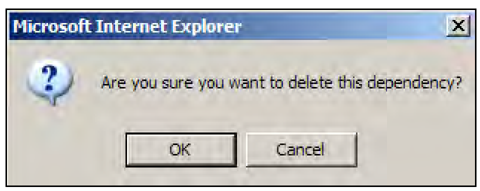
4.20.2.3 Delete an Investment Relationship

To Delete an Investment Relationship:

1. Click the **Delete** link for the specific investment that will be deleted. This will return the results of the selected row in the data entry form.



2. Confirm deletion of the dependency. Click **OK**.



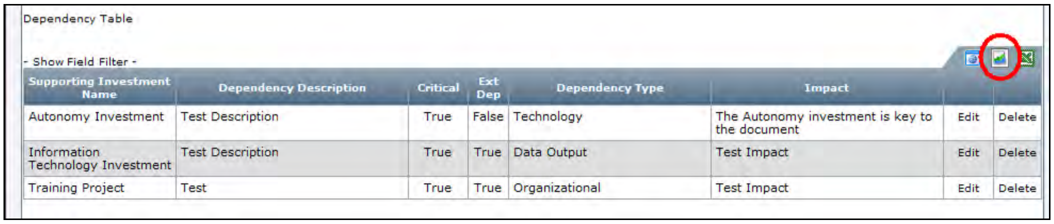
4.20.2.4 Generate Dependency Report

A report can be generated to show all Supporting (inputs) Investments and Dependent (outputs) Investments for the current investment. The report shows two sections: 1) a list of investments from which the current investment receives input and 2) a list of investments to which the current investment outputs. A dependent investment is classified as an investment for which the current investment provides output making that investment dependent upon the current investment. A supporting investment is classified as an investment from which the current investment receives input in order to support the current investment.

The Dependency report can be generated to show all of the Supporting (inputs) Investments and Dependent (outputs) Investments related to the current investment.

To generate the report:

1. Click on the **Generate Dependency Report** icon.

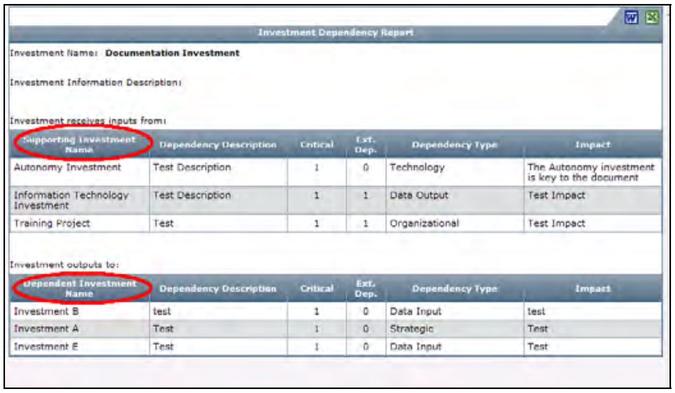


Dependency Table

- Show Field Filter -

Supporting Investment Name	Dependency Description	Critical	Ext Dep	Dependency Type	Impact		
Autonomy Investment	Test Description	True	False	Technology	The Autonomy investment is key to the document	Edit	Delete
Information Technology Investment	Test Description	True	True	Data Output	Test Impact	Edit	Delete
Training Project	Test	True	True	Organizational	Test Impact	Edit	Delete

<u>The Investment Dependency Report will appear in a separate pop-up window</u>:



Investment Dependency Report

Investment Name: **Documentation Investment**

Investment Information Description:

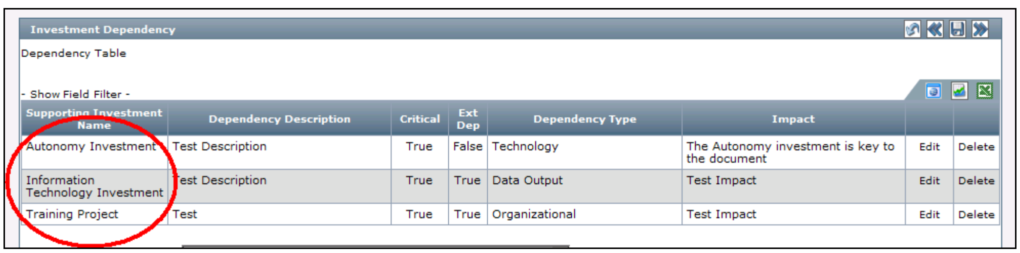
Investment receives inputs from:

Supporting Investment Name	Dependency Description	Critical	Ext. Dep.	Dependency Type	Impact
Autonomy Investment	Test Description	1	0	Technology	The Autonomy investment is key to the document
Information Technology Investment	Test Description	1	1	Data Output	Test Impact
Training Project	Test	1	1	Organizational	Test Impact

Investment outputs to:

Dependent Investment Name	Dependency Description	Critical	Ext. Dep.	Dependency Type	Impact
Investment B	test	1	0	Data Input	test
Investment A	Test	1	0	Strategic	Test
Investment E	Test	1	0	Data Input	Test

The *Supporting/Input Investments* are all the investments that have been inputted into the Dependency Table for the current investment. These are the investments for which the current investment, in this case 'Documentation Investment', is dependent upon or receives input from.



Investment Dependency

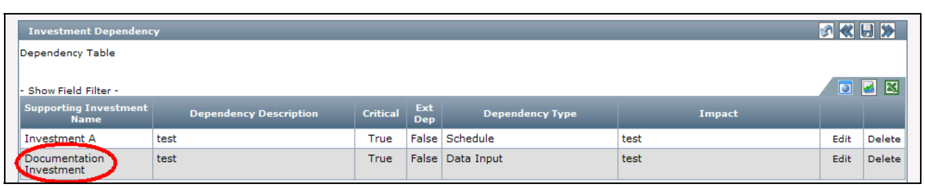
Dependency Table

- Show Field Filter -

Supporting Investment Name	Dependency Description	Critical	Ext Dep	Dependency Type	Impact		
Autonomy Investment	Test Description	True	False	Technology	The Autonomy investment is key to the document	Edit	Delete
Information Technology Investment	Test Description	True	True	Data Output	Test Impact	Edit	Delete
Training Project	Test	True	True	Organizational	Test Impact	Edit	Delete

In the above example, users can see that the 'Autonomy Investment', the 'Information Technology Investment', and the 'Training Project' investment, all support or are inputs to the 'Documentation Investment.'

The *Dependent/Output Investments* listed on the dependency report are all the investments that list the current investment in their dependency table as a Supporting/Input investment. These are the investments to which the current investment is an output.



Investment Dependency

Dependency Table

- Show Field Filter -

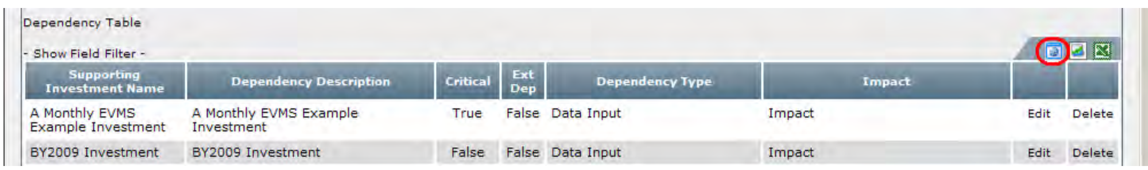
Supporting Investment Name	Dependency Description	Critical	Ext Dep	Dependency Type	Impact		
Investment A	test	True	False	Schedule	test	Edit	Delete
Documentation Investment	test	True	False	Data Input	test	Edit	Delete

In the above example, users can see that the ‘Documentation Investment’ is listed as a Supporting /Input Investment under the dependent investment - ‘Investment B.’

4.20.2.5 Run Relationship Mapper

The Relationship Mapper allows users to graphically visualize the input and output relationships between investments in eCPIC. Not only can a user see the Supporting (inputs) Investments and Dependent (outputs) Investments, but they can also view the additional investment relationships by drilling down through the investment nodes.

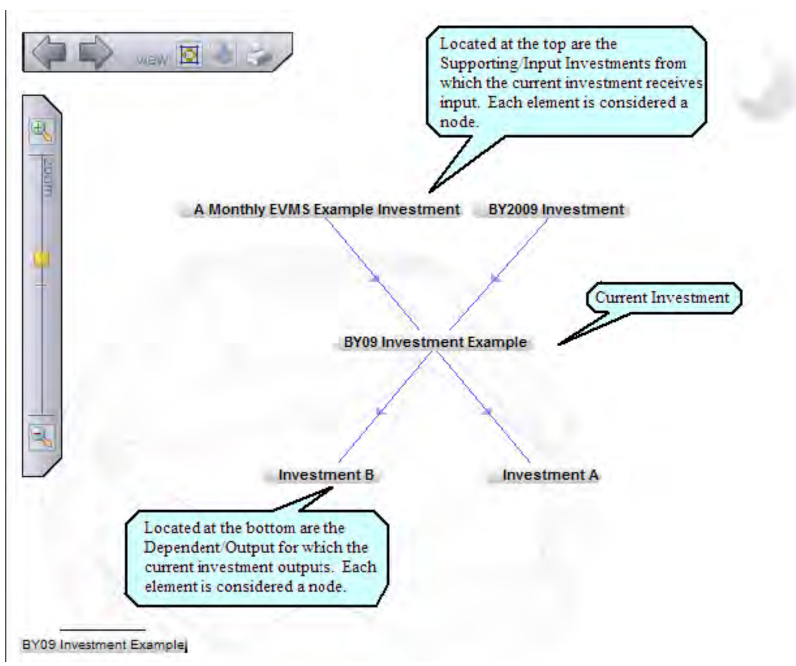
1. Click on the **Run Relationship Mapper** icon.


Dependency Table

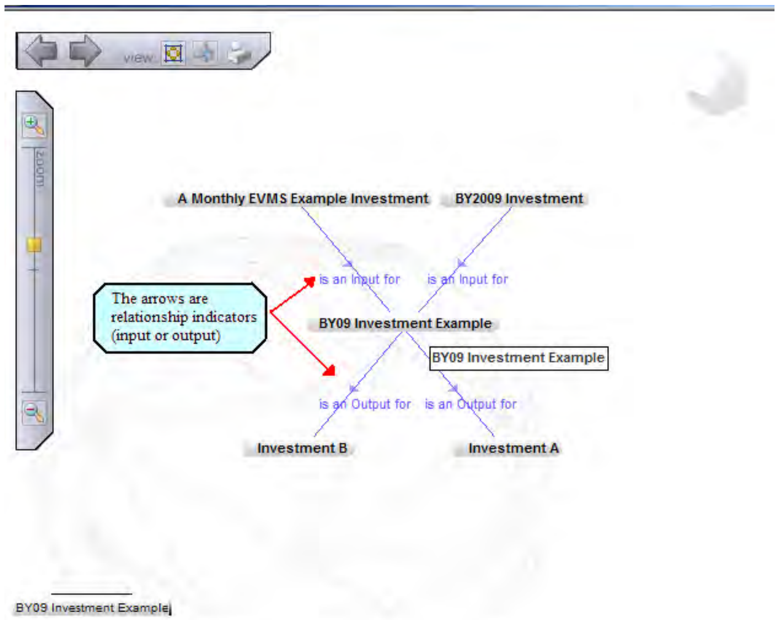
- Show Field Filter -

Supporting Investment Name	Dependency Description	Critical	Ext Dep	Dependency Type	Impact		
A Monthly EVMS Example Investment	A Monthly EVMS Example Investment	True	False	Data Input	Impact	Edit	Delete
BY2009 Investment	BY2009 Investment	False	False	Data Input	Impact	Edit	Delete

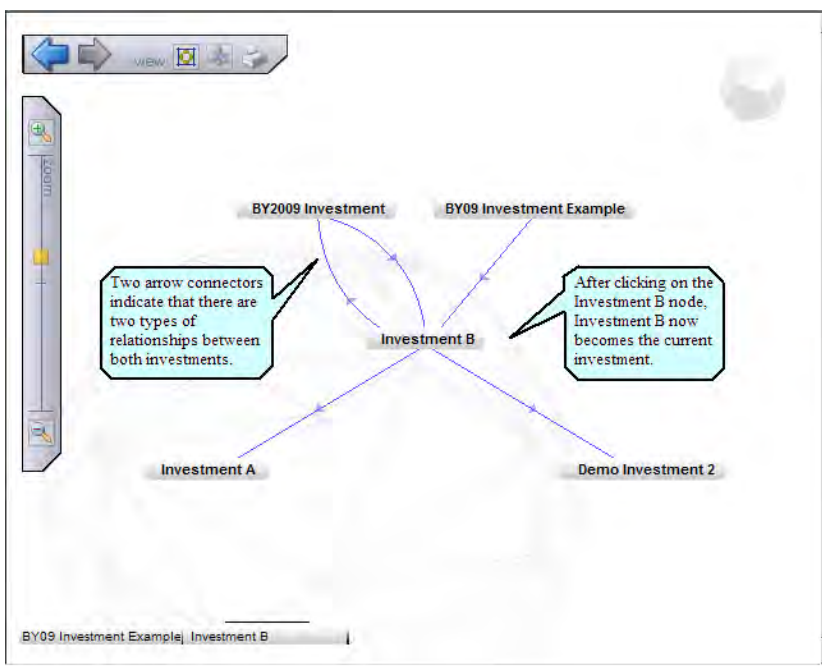
<u>The Relationship Mapper will appear:</u>



To see the relationship mappings of the other associated investments, click on the investment node. *When users place the mouse over the investment node, a tooltip will appear displaying the investment name. Users will also see how the relationship relates (whether investments are inputs or outputs) by viewing the direction of the arrows.*



After clicking on an investment node, thereby drilling down into that investment, the Relationship Mapper will then reload with that investment as the current investment and display all of its Supporting (inputs) Investments and Dependent (outputs) Investments.



In the above example, users can see the Supporting Investments (*those that are inputs for 'Investment A'*) which are, 'Investment B', 'Documentation Investment' and 'Investment J'. They can also see the Dependent/Output Investments (*those investments to which 'Investment A' provides output*) which are, 'Autonomy Investment' and 'Investment H'.

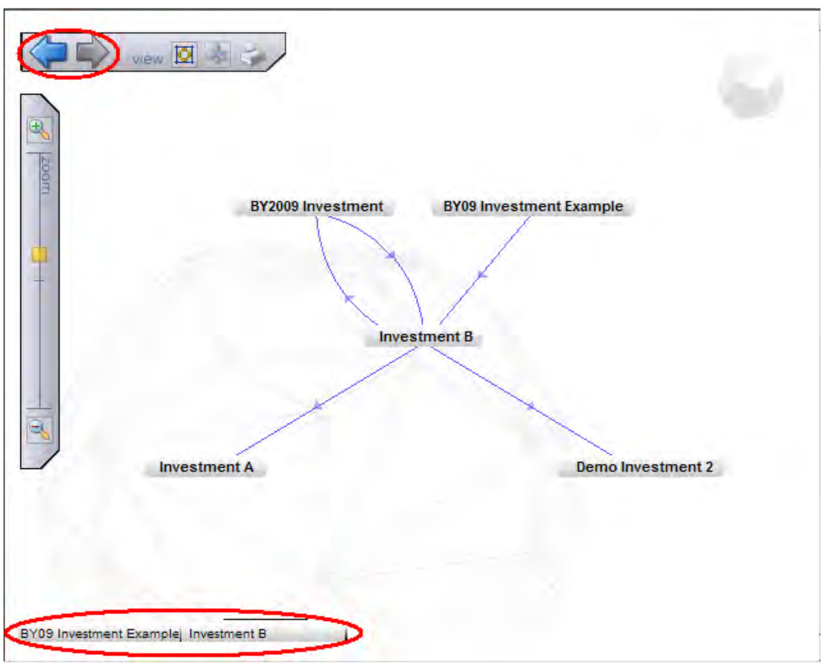
Notice that there are two arrows that point to and from ‘Investment A’ and ‘Investment B’. These arrows show that ‘Investment B’ acts as Supporting/Input Investment for ‘Investment A’ and ‘Investment A’ acts as a Supporting/Input Investment to ‘Investment B’.

Also, ‘Investment H’ acts as a Dependent/Output Investment for ‘Investment A’ and ‘Investment A’ acts as a Dependent/Output Investment to ‘Investment A’.

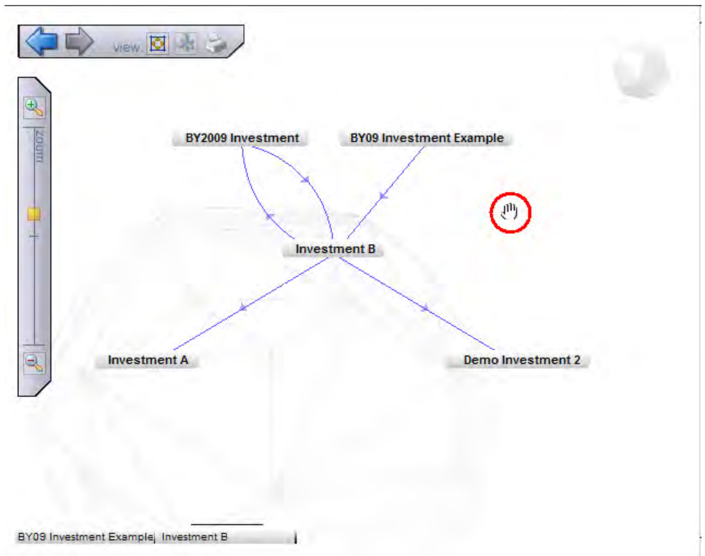
4.20.2.6 Navigating and Viewing the Relationship Mapper

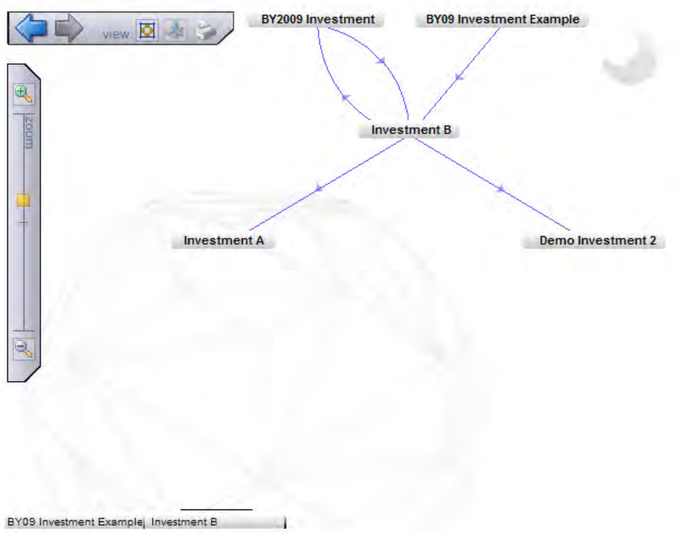
The Relationship Mapper allows users to visually access relationships in different ways and provides easy navigation from one investment to another.

To navigate back to the original investment’s relationships or any of the investments the user has chosen to view as the Current Investment, users can click on the **History Bar** located at the bottom of the mapper, or can use the **Next** and **Back** arrows located in the top left corner of the mapper.

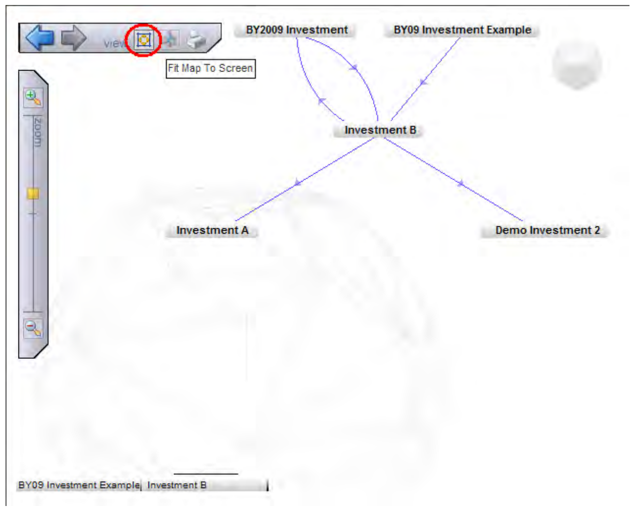


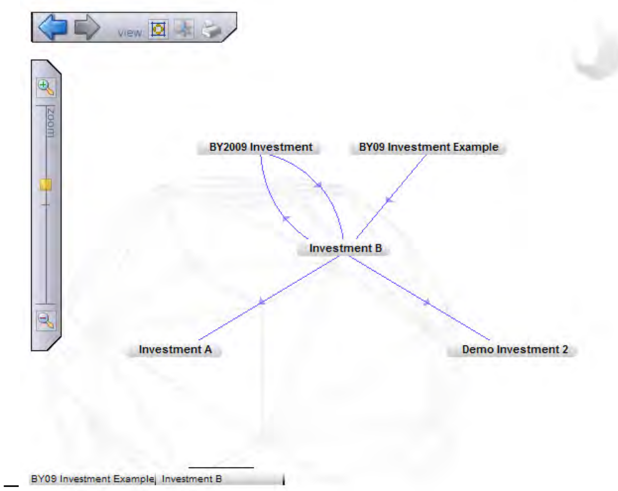
By clicking on the canvas of the Relationship Mapper (not on an investment node), users can drag the full mapping anywhere within the window.





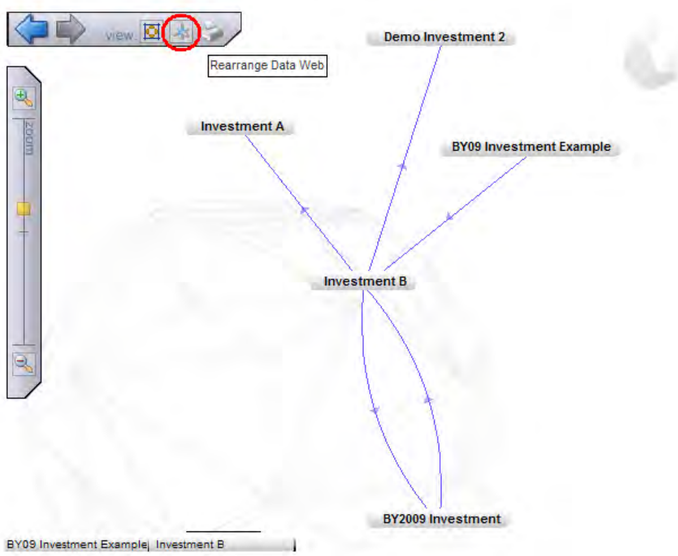
The **Fit Map To Screen** icon allows users to fit the map to the screen so that it is centered.

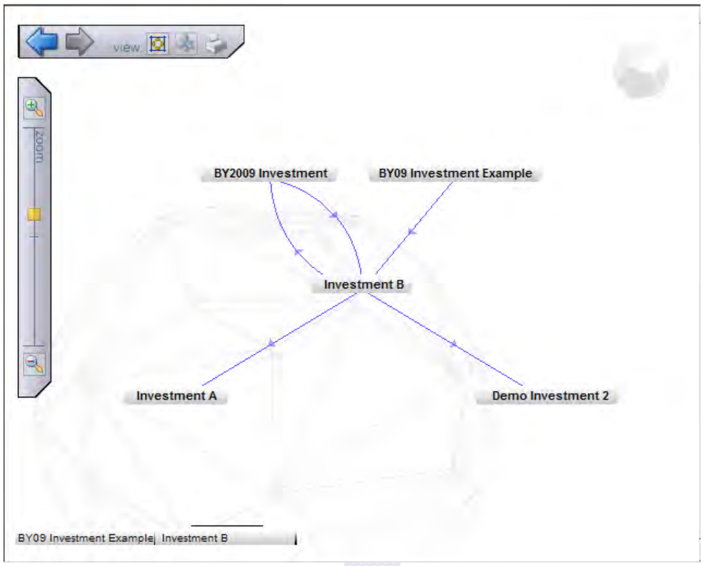




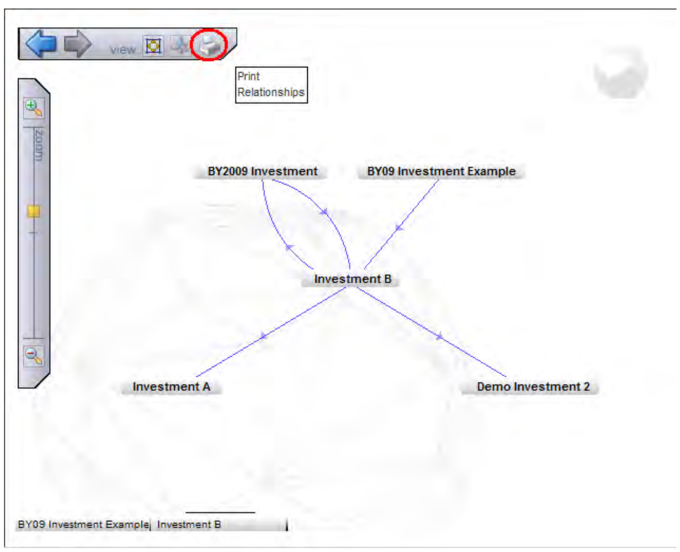
Users can choose to click on an investment node and drag it to another location within the window to better view individual relationships. ***This will not change the relationship***.

The **Rearrange Data Web**  icon allows users the rearrange the investment nodes back to their original positions.

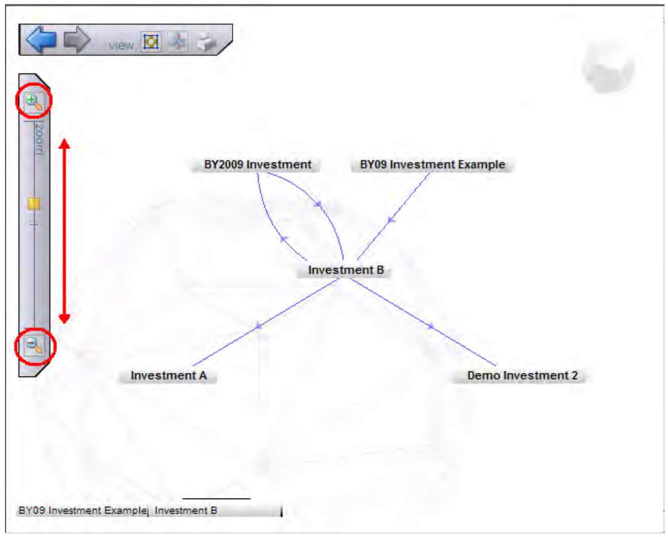




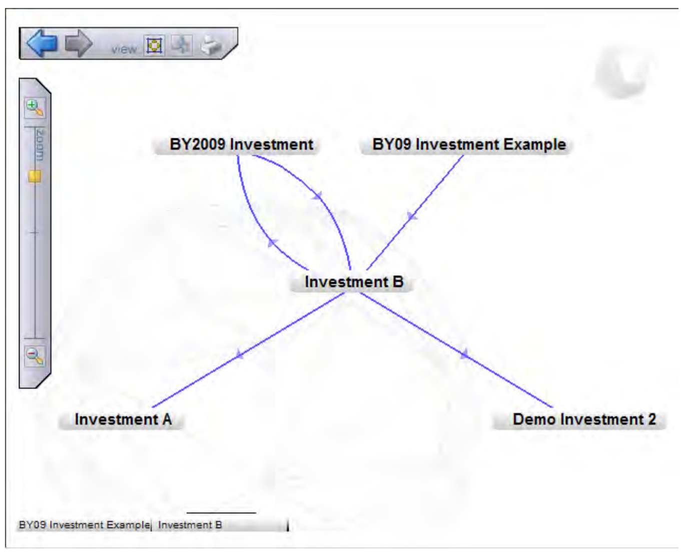
The Relationship Mapper also has a Print  feature which allows users to print the investment nodes and their relationships that are currently displayed in the mapper.



A Zoom feature is another capability that users have when viewing the mapper.



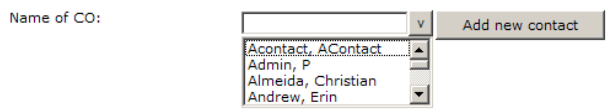
By clicking on the Zoom In  or Zoom Out  icon, or by dragging the Zoom Level, a user can enlarge or shrink the investment nodes.



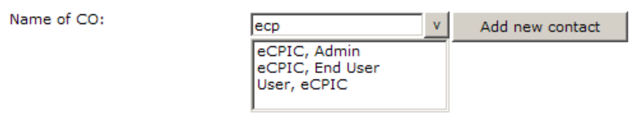
4.20.3 Auto-Lookup for Contacts and Users

Throughout eCPIC, when a person's name (*such as the name of Project Manager in Section I.A: Screening Questions BY09*) is being collected, an **Auto-lookup Control** form is available for entering the data. The Auto-lookup Control acts as a combination text box/single select list box, that is dynamically populated based on the text string users type into the text box.

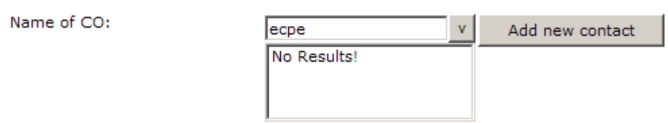
1. If users click the down arrow beside the entry field, they will see a list of all eCPIC users and contacts that have previously been entered into the system. Users can then scroll through the list and select the appropriate person desired.



However, if users know at least part of the person's name, type it in and the list is filtered to include only those names that contain the text string entered. It will continue to filter as they type. At any time users can select a name from the list.



If the person users want to select has not yet been entered into eCPIC as either a user or a contact, the list will appear empty with 'No Results' listed in the select box.



2. Click **Save** to save the data or **Next** or **Back** to proceed.

4.20.3.1 Add Contact

To Add a Contact:

1. Click the **Add new contact** button to the right of the field. This will open up a datagrid data entry form just below the field.

2. Fill out the contact information.

3. Click the **Save** button.

4.21 Ad-Hoc Reporting

eCPIC offers **Ad-Hoc** reporting functionality that allows users to define custom reports on any data field captured in the system. Once the report has been saved, it will be accessible to that user until deleted from the system. The user will also have the option of making the report Public so that it can be accessed by other users of the system.

Users have the choice of updating reports in either a Basic or Advanced editing mode. When editing report parameters, a link is available to switch between these modes at any time. Additionally, all reports can be run in both the horizontal style, and the vertical layout. Every vertical report will have the option of being exported as a Microsoft Word document, and every horizontal style report will have the option of being exported as a Microsoft Excel file.

4.21.1 Access Report List

To Access Report List:

1. Click on the Navigation Tree.

2. Click on Reporting.