INFORMATION
Management Conference

Electronic Capital Planning and Investment Control (eCPIC) Training

Transformation through Partnerships

LaShayla Hopkins and Mike Pupjak

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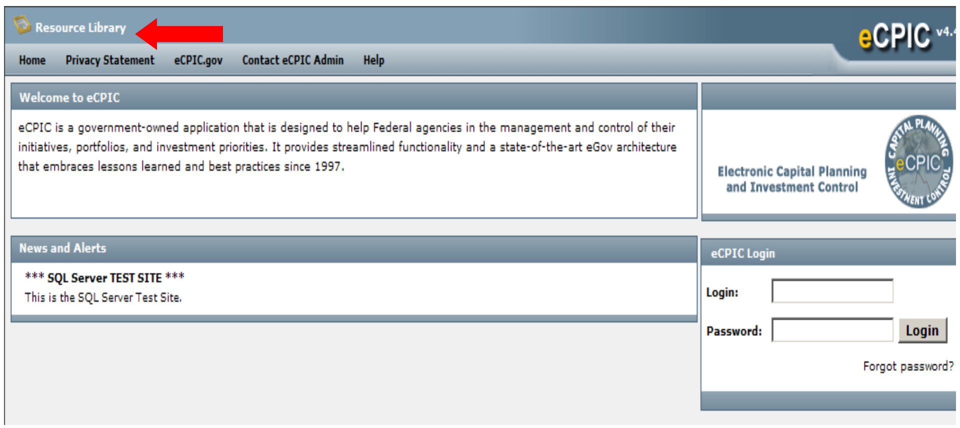
Agenda

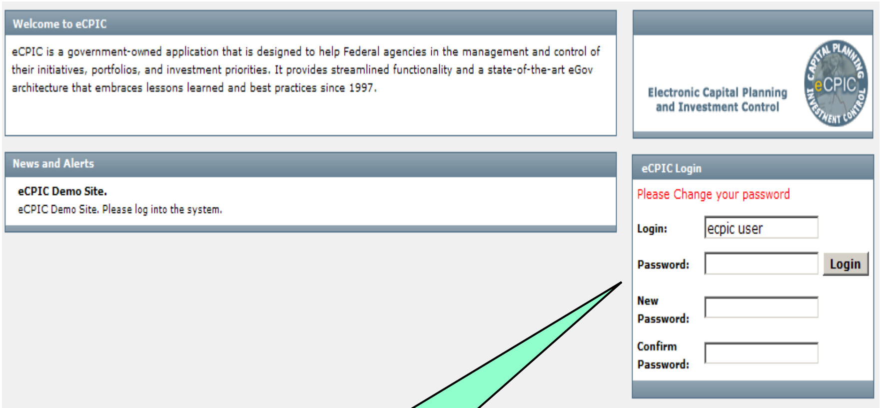
- Login
- Creating an Investment
- Navigation
- Toolbar Functionality
- Portfolio Management
- Customized Reporting
- OMB's IT Dashboard

Login

Electronic Capital Planning and Investment Control (eCPIC) Website:
https://ecpic.doe.gov

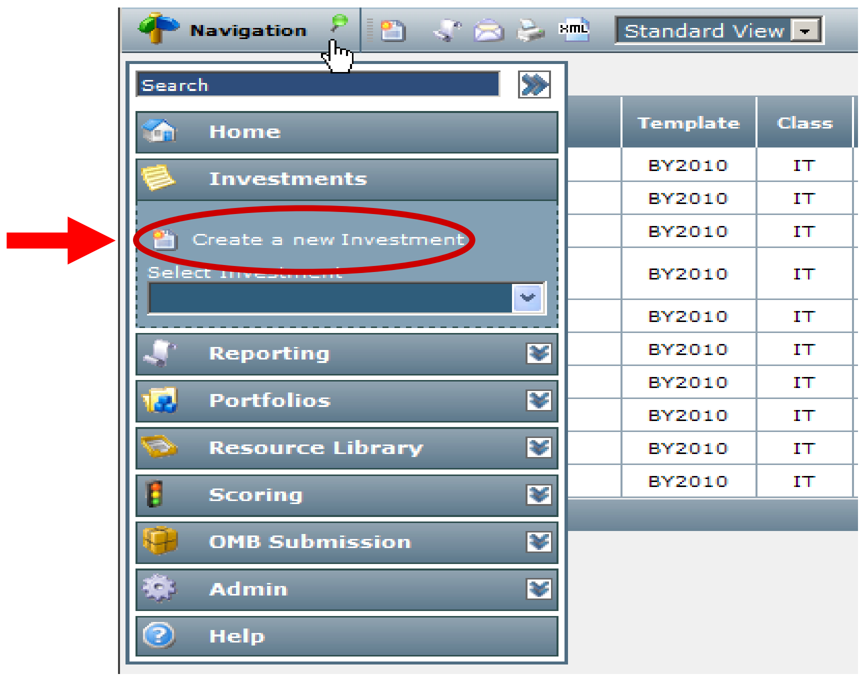
- Resource Library contains public documents
- Email the System Administrator directly from the application





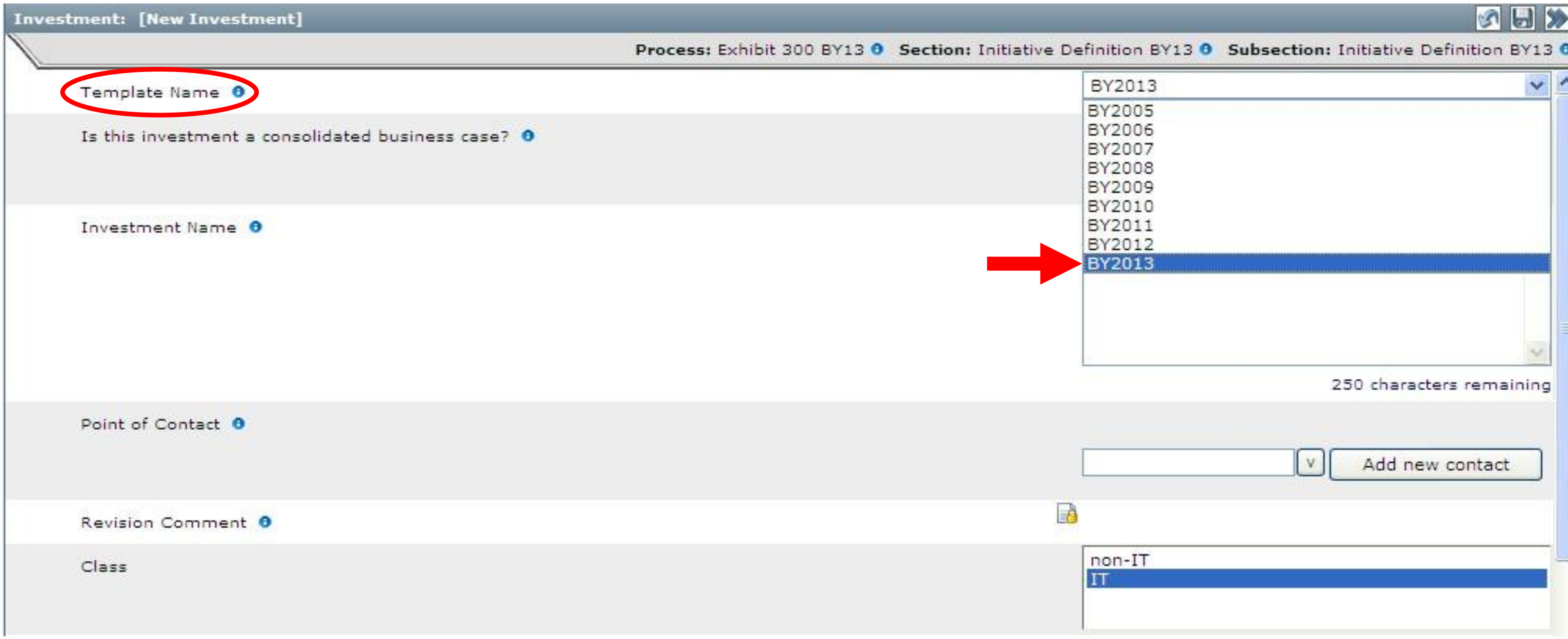
Password Restrictions:
- 8 characters
- 1 capital letter
- 1 number
- 1 special character

Creating an Investment



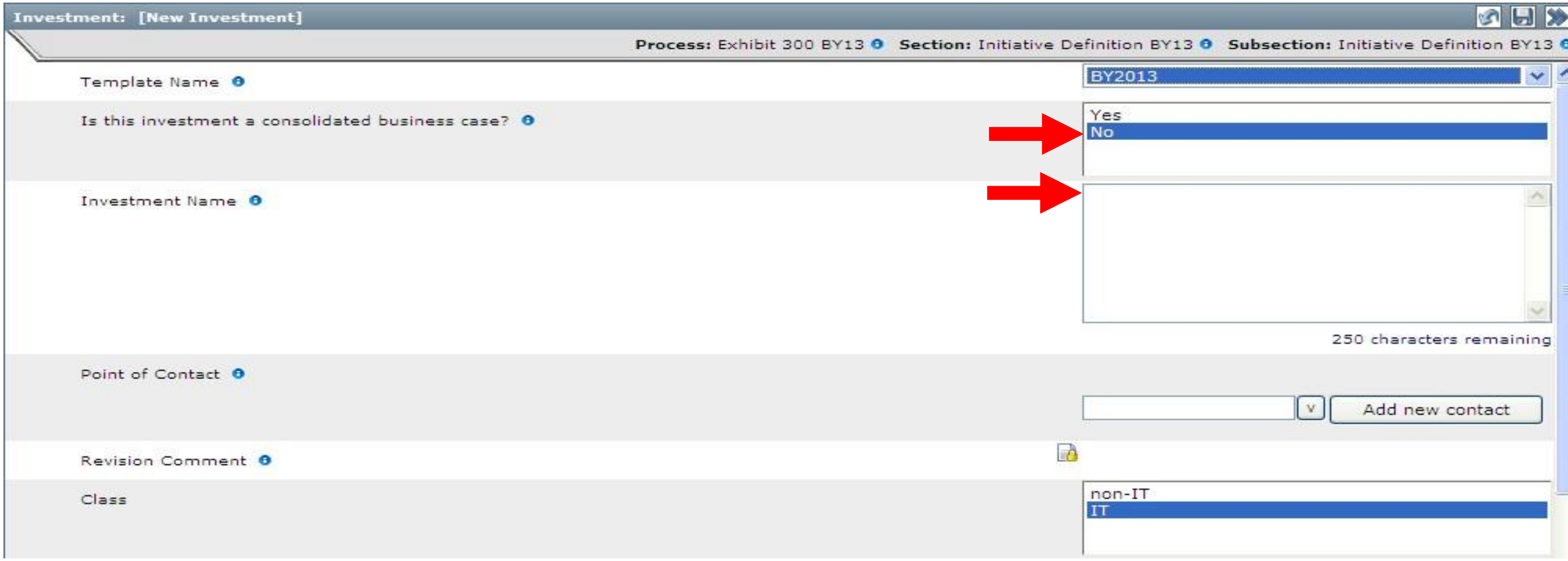
- If given access rights, a user can click on the **New Investment** icon located in the toolbar menu or click on the **Create a new Investment** button, located in the Investments module.

Creating an Investment
Template Name



- When creating a new investment, users have the option of associating the investment with any of the templates that are available. Select the most current **Template Name** the new investment will be associated with.
- The most current BY template will be available once OMB finalizes their Circular A-11 guidance, and releases the final XML schema to the eCPIC developers to incorporate into the application. This activity typically occurs in August.

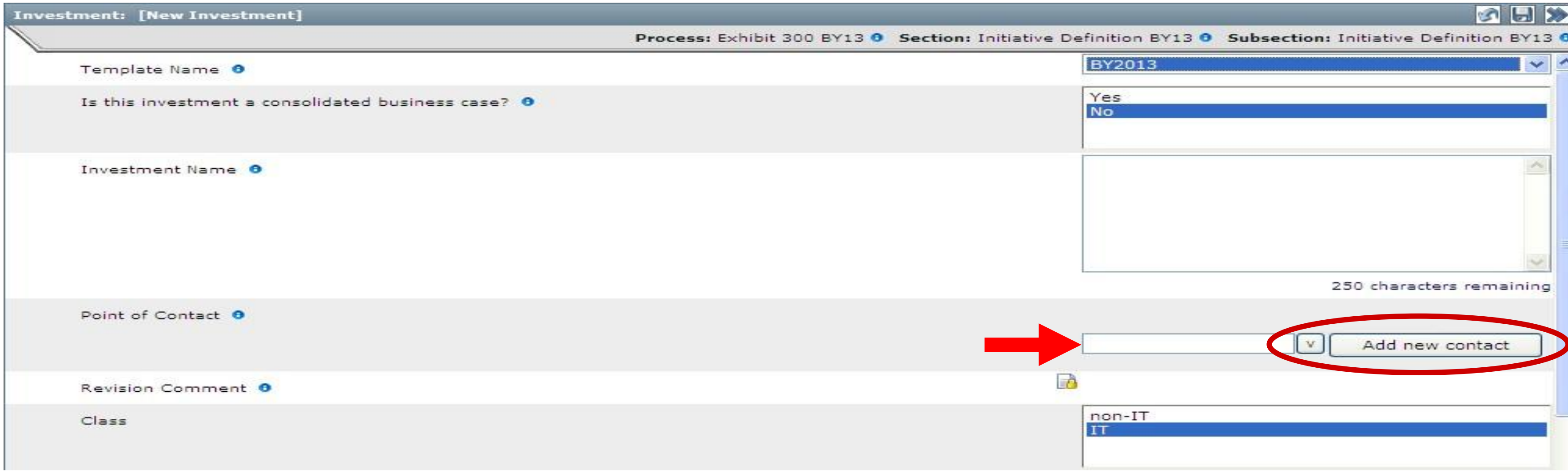
Creating an Investment
Consolidated Business Case?



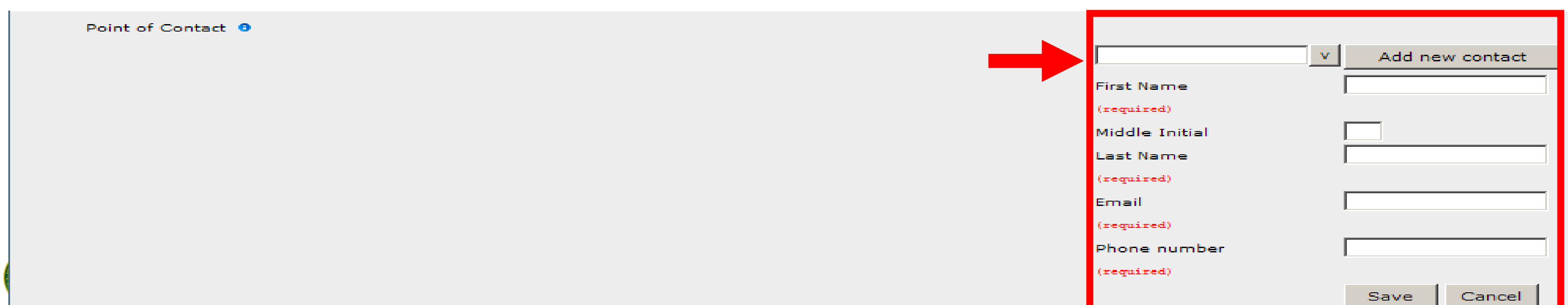
- Select whether the new investment will be a **consolidated business case** or a standard business case. If 'Yes' is selected, users will have the ability to create sub-investments (children) for the new investment.
- Enter the name of the investment.
- ***Note: Once 'Yes' or 'No' has been selected 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.***

Creating an Investment

Point of Contact and Class



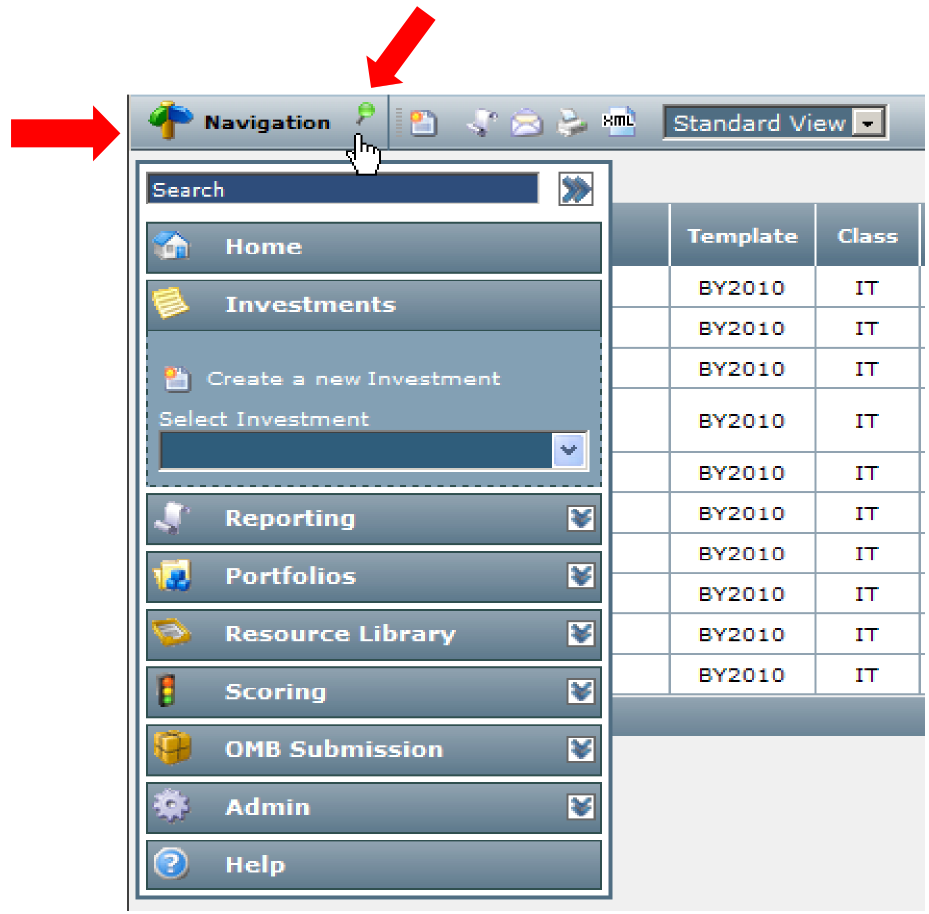
- Enter the **Point of Contact (POC) and Class** of the investment. Clicking on the drop-down arrow will show a list of selections. If no names appear or if the POC is not listed, then click on the **Add new contact** button and fill in the required information. If no contact is selected, the creator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



Navigation Panel

To open the **Navigation panel**, mouse over the navigation icon located on the eCPIC toolbar.

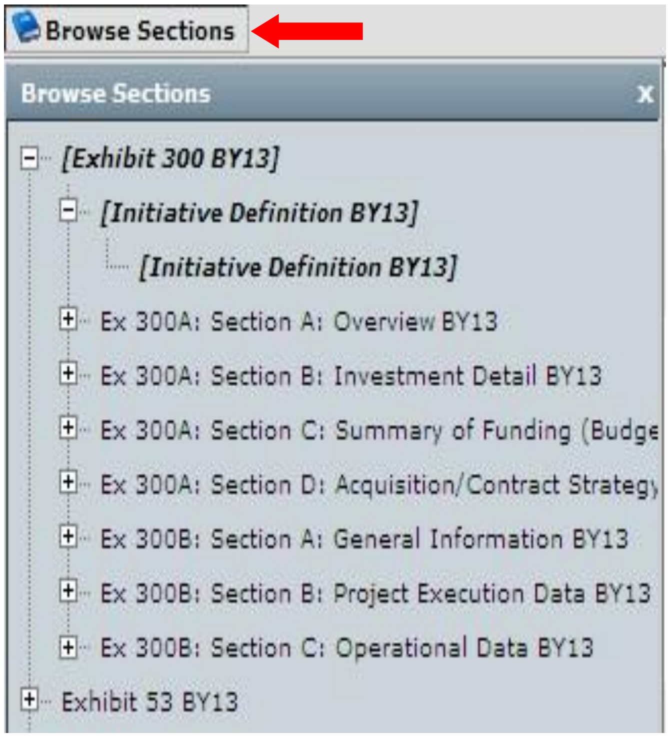
To pin/unpin the Navigation panel, click on the Pin icon within the Navigation drop down list.

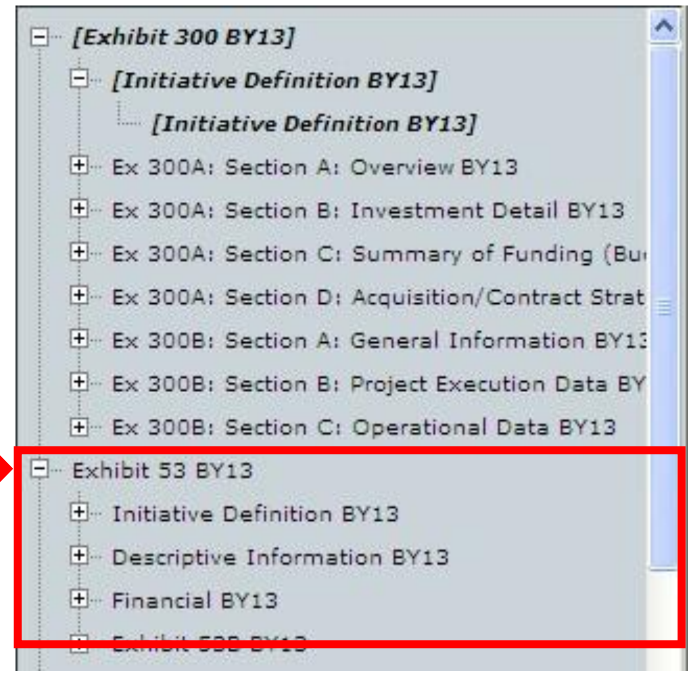


Navigation

Exhibit 300 and Exhibit 53 Browser

Click on the browse sections Browse Sections icon to open the process browser. The list of available processes will be displayed below in a tree format.





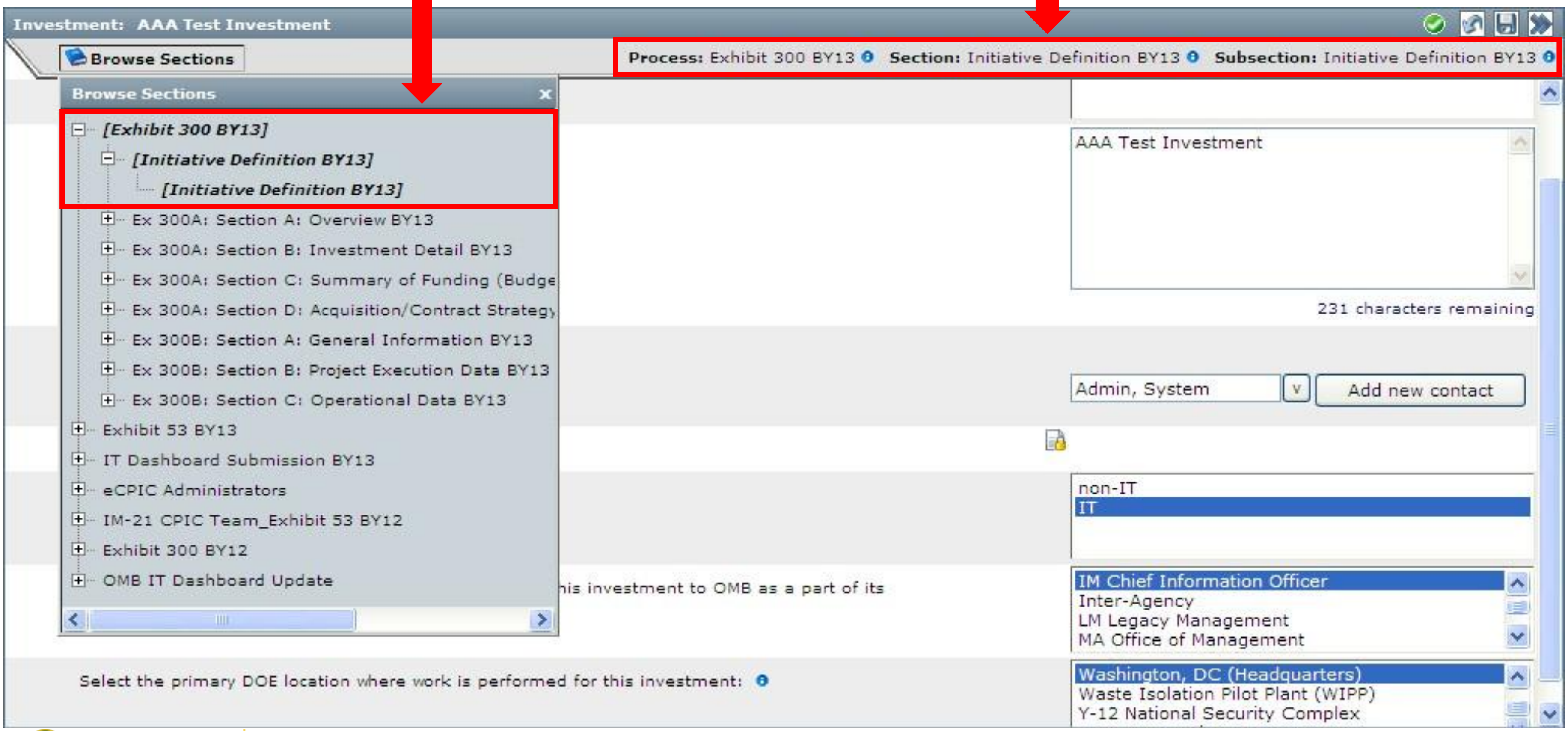
Click on the (+) icon to expand a process and view the sections under that process. Likewise, clicking on the (+) for each section will display the subsections under that section.

Navigation

Currently Displayed Section

When the process browser panel window is open, the currently displayed section and sub-section will also be highlighted.

When navigating through an investment, the current process, section and sub-section will be displayed at the top of the investment. This will ensure the user can easily identify which process, section and sub-section they are currently viewing.



Navigation
Exhibit 53B IT Security Funding

- To Report Exhibit 53B Funding:

1. Access the BY 2013 “mission” portfolio for the program office (i.e. BY 2013 CF Chief Financial Officer Portfolio)

2. On the portfolio’s toolbar, select the Edit Security Spending icon ( ). This will load the Edit IT Security Costs page.

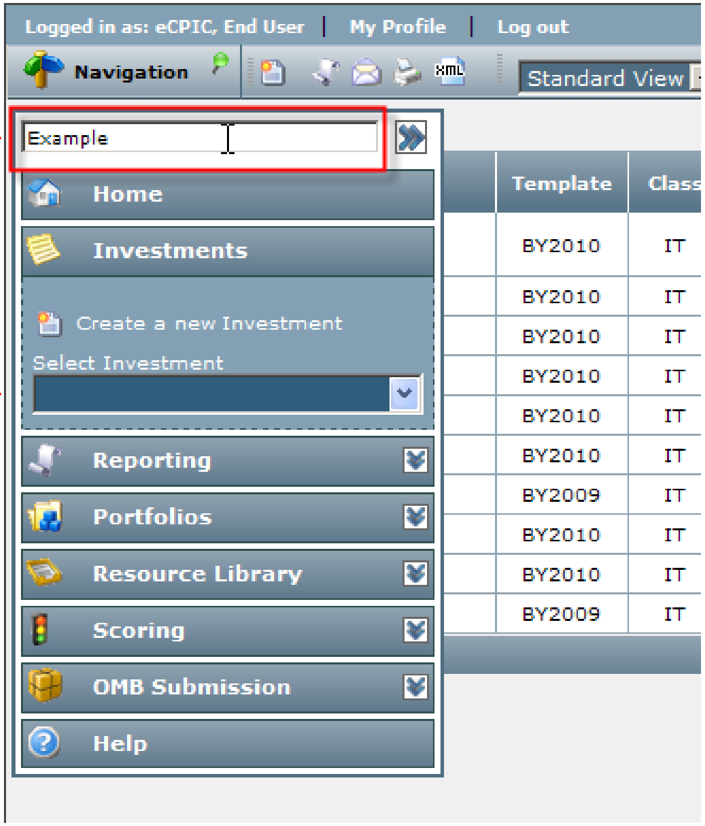
3. Enter the appropriate values into the table for each spending category (Note that agency code is auto-populated based on the agency setting in the Admin module).

4. Click on the Save icon ( ) to save all changes.

Note: The Exhibit 53B data should be reported at the portfolio level. There will be one Exhibit 53B submission per Program and Staff Office, unless the office relies on DOECOE for security services. In that case, the security dollars will be reported by IM-60.

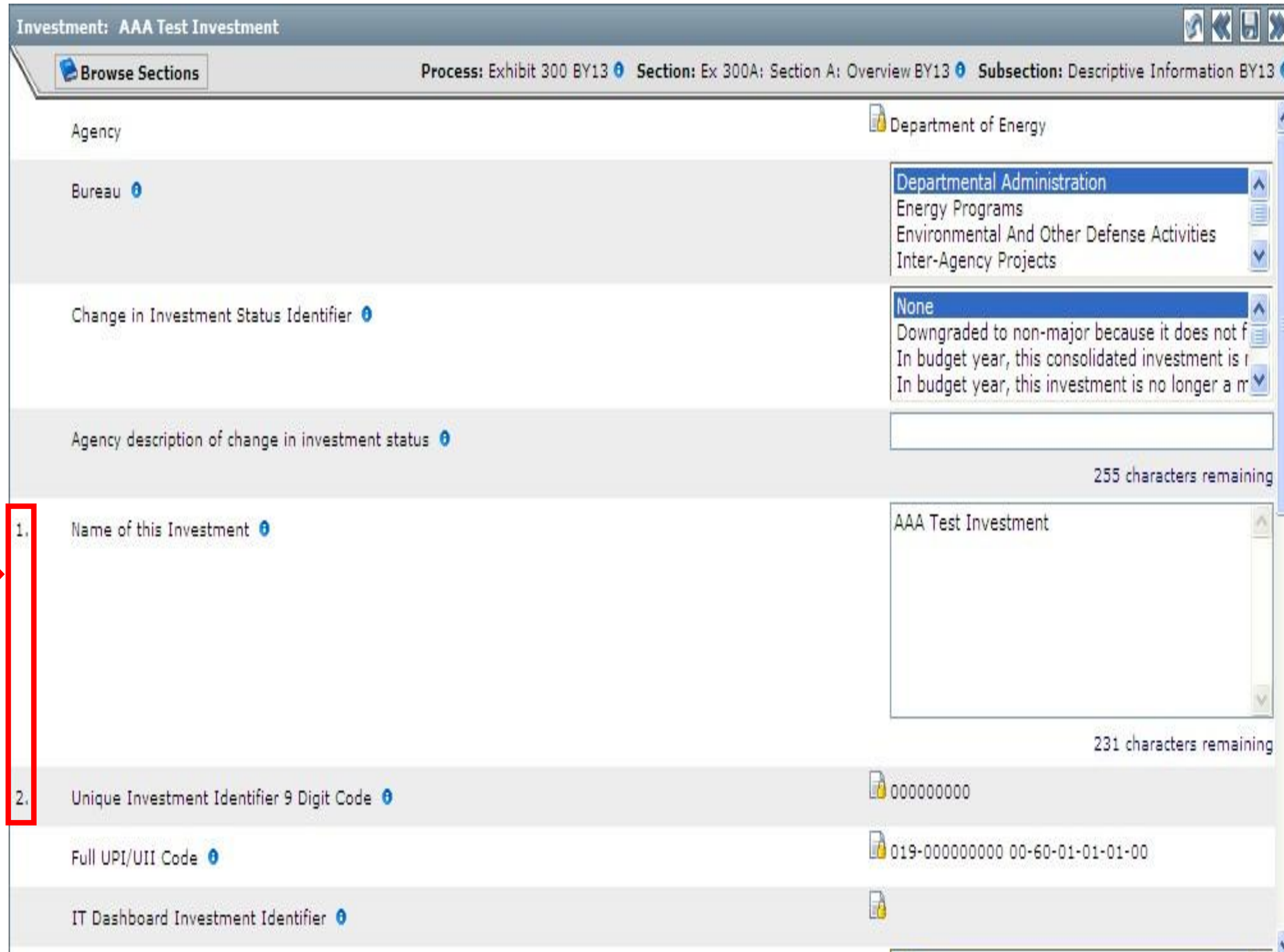
Navigation
Search

From the Navigation panel, users can use the **Search** function from anywhere within eCPIC to find Investments, Portfolios, Resources, and OMB Submissions that contain a specific keyword in their respective names and/or descriptions.



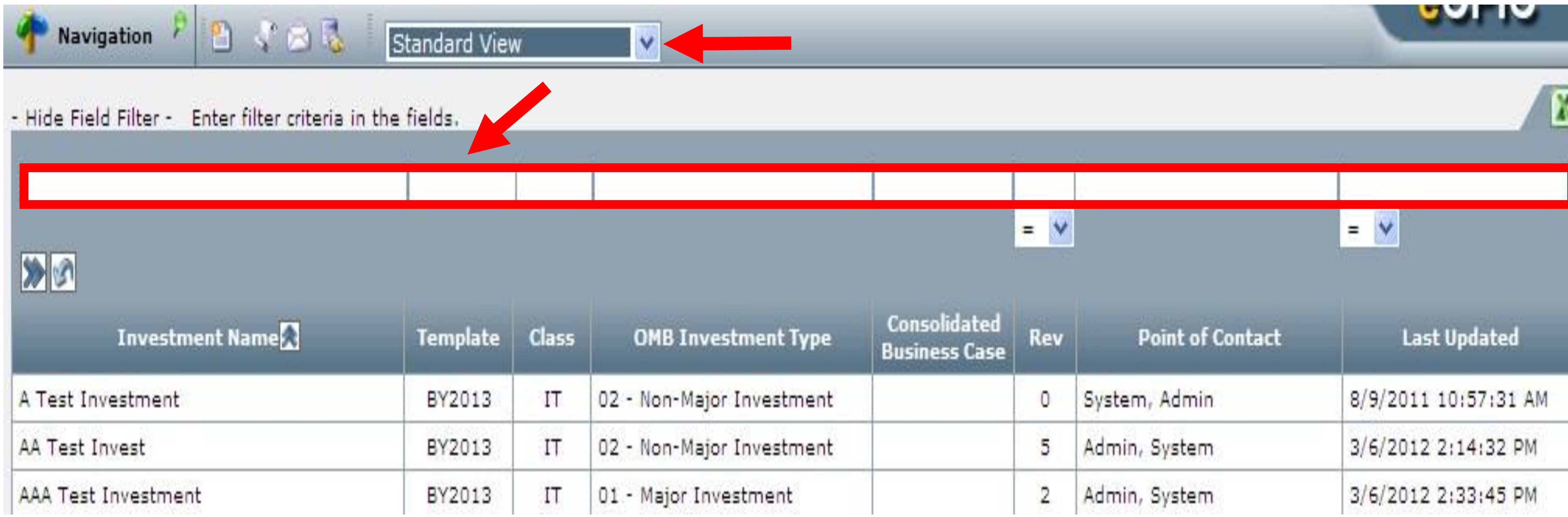
Navigation
Field Numbering

To aid in users with aligning eCPIC processes to OMB Exhibit 300 guidance when filling out a business case, eCPIC displays field numbers in the system user interface along with the field name.



Navigation
Investment Views and Filtering

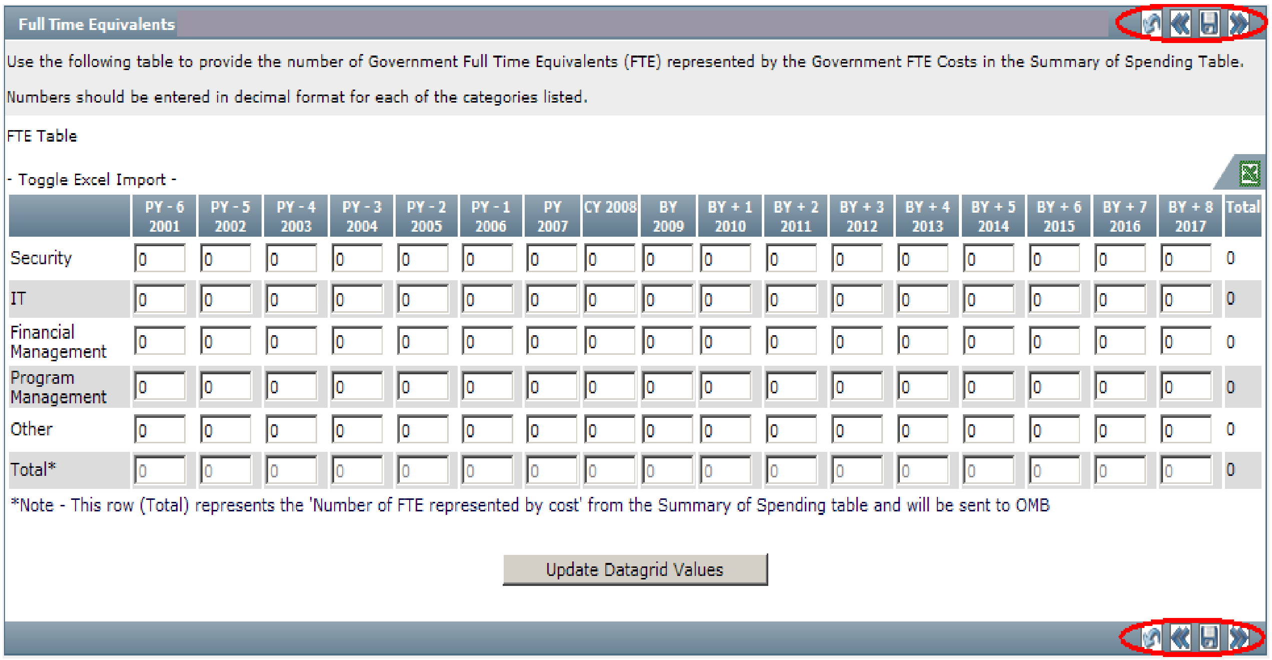
eCPIC has a default investment view that is seen each time the Investments module is selected. It is called the **Standard View**.



Investment Name	Template	Class	OMB Investment Type	Consolidated Business Case	Rev	Point of Contact	Last Updated
A Test Investment	BY2013	IT	02 - Non-Major Investment		0	System, Admin	8/9/2011 10:57:31 AM
AA Test Invest	BY2013	IT	02 - Non-Major Investment		5	Admin, System	3/6/2012 2:14:32 PM
AAA Test Investment	BY2013	IT	01 - Major Investment		2	Admin, System	3/6/2012 2:33:45 PM

On the top of many tables throughout the system, eCPIC offers filters to alleviate the need to scroll through long lists and decrease time spent searching for investments, users, processes, etc.

Navigation
Save Icons


Full Time Equivalents

Use the following table to provide the number of Government Full Time Equivalents (FTE) represented by the Government FTE Costs in the Summary of Spending Table.

Numbers should be entered in decimal format for each of the categories listed.

FTE Table

- Toggle Excel Import -

	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 2010	BY + 2 2011	BY + 3 2012	BY + 4 2013	BY + 5 2014	BY + 6 2015	BY + 7 2016	BY + 8 2017	Total
Security	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
IT	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Financial Management	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Program Management	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Other	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	0	0	0	0	0	0	0	0	0	0	0	0

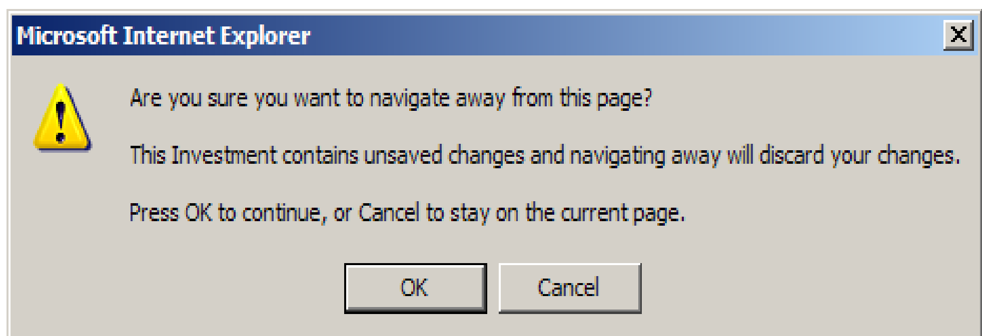
*Note - This row (Total) represents the 'Number of FTE represented by cost' from the Summary of Spending table and will be sent to OMB

Update Datagrid Values

When in the Investments module, there is an **Undo** icon**, Save Back** and **Next** arrow icons, and a **Save** icon to assist the user in moving through pages.

Navigation
Save Icons (cont.)

- **Reminder to Save**
  - When data has been entered into an investment and the page has not been saved, an alert (⚠) icon will display next to the save icons within the investment.
  - Once the user saves the page, a saved icon (✔) will be displayed, notifying the user that the page is up to date and no changes have been made since the last save.
  - After modifying data within an investment, if a user attempts to navigate away from the current page without saving that data, a pop-up message will appear warning users that the investment contains unsaved changes.

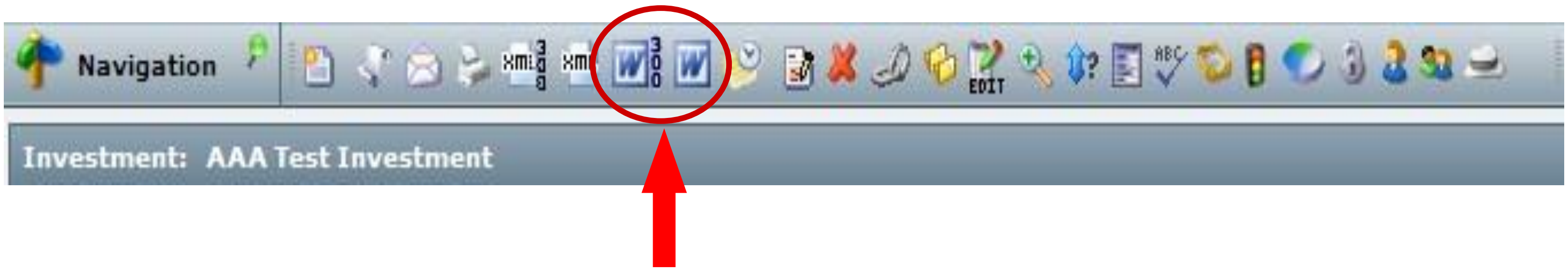


Toolbar Functionality
XML Validation

Count	Type	XML Errors	Location(s) in the Workflow (Section - Subsection)
1	Error	The 'What costs are included in the reported Cost/Schedule Performance information (Government Only/Contractor Only/Both)?' element has an invalid value according to its data type. This field cannot be blank	II.C: Cost and Schedule Performance BY08 - Earned Value BY08 III.B: Cost and Schedule Performance BY08 - Performance Baseline BY08 IV.C: Cost and Schedule Performance BY08 - Earned Value BY08
2	Warning	There are 3 systems defined in the Planning & Operational Systems - Privacy Table, but 2 systems total between the Systems in Planning - Security and Operational Systems - Security Tables. The number of systems in the privacy table should be equal to the number of systems in the two Security tables.	I.E: Security and Privacy BY08 - Privacy: Planning & Operational Systems BY08

- **Schema Validation**: This problem is classified as an '**Error**'. *Errors* will keep users from generating the XML. They will have to go to the location of the Error and modify the data.
- **Business Logic Validation**: This problem is classified as a '**Warning**'. *Warnings* will allow users to generate the XML. However, the warning will assist in reviewing the business case for issues that may need to be reviewed.

Toolbar Functionality
Word Export

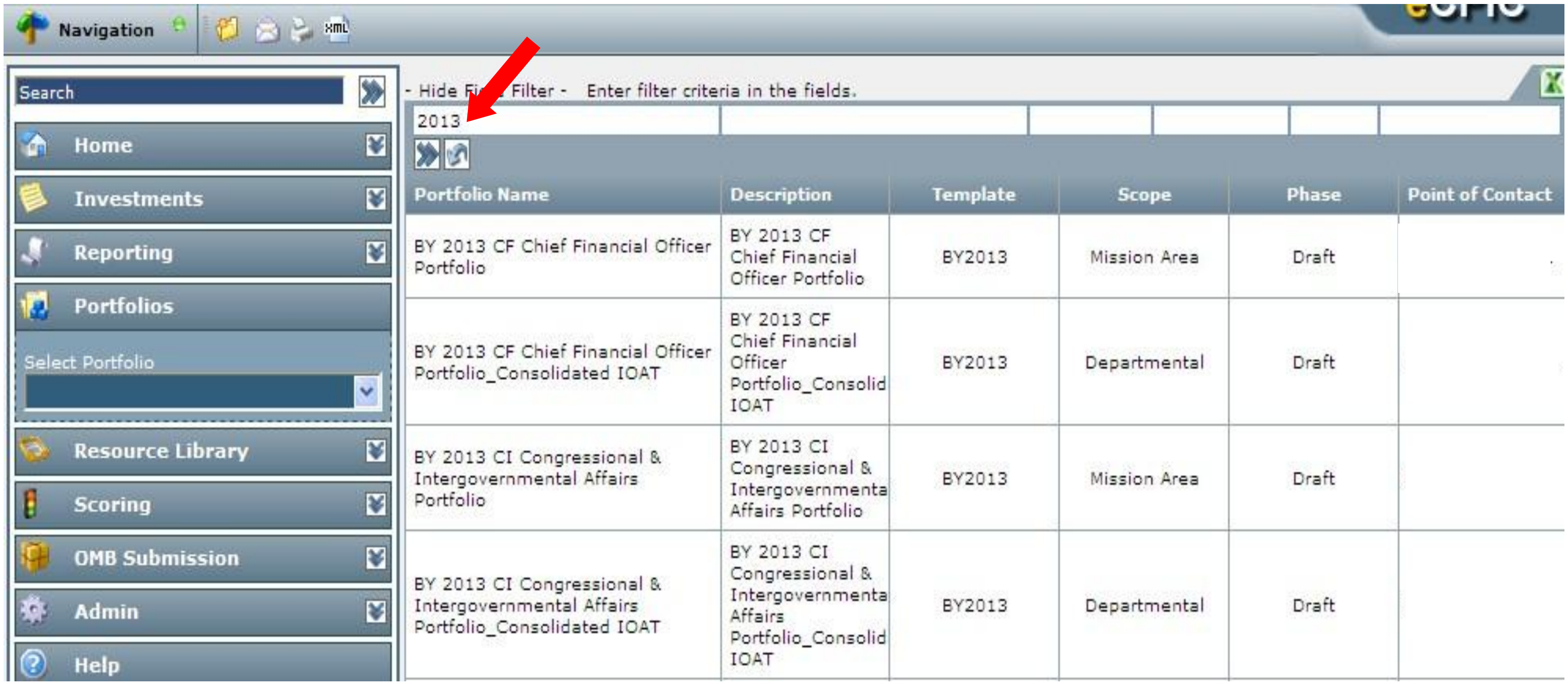


- The ‘**Export to Word 300**’ option exports the investment into a Word document formatted according to the OMB A-11 Guidance. The order of the fields and questions mirrors that of the template in Circular A-11. *It will only export OMB required fields*.
- The ‘**Export to Word**’ option exports all investment fields as they are seen in eCPIC. *It will export ALL data, including DOE required fields*.

Portfolio Management

Portfolio Name	Description	Template	Scope	Phase	Point of Contact
Agency Consolidated Investments Portfolio BY 2005	This is the official consolidated agency investments portfolio used for OMB submission.	BY2005	Agency	Draft	Admin, System
Agency Consolidated Investments Portfolio BY 2006	This is the official consolidated agency investments portfolio used for OMB submission.	BY2006	Agency	Draft	Admin, System
Agency DOE Portfolio BY 2005	Contains all reporting BY 2005 Portfolios for DOE.	BY2005	Agency	Draft	Admin, System
Agency DOE Portfolio BY 2006	Contails all DOE BY 2006 Reporting Portfolios.	BY2006	Agency	Draft	Admin, System
Agency Package BY2007		BY2007	Mission Area	Alternate	Admin, System
Agency Portfolio BY 2008		BY2008	Mission Area	Alternate	Admin4, eCPIC
Agency: BY 2009 DOE OMB Reporting Portfolio	Agency: DOE OMB Reporting Portfolio BY 2009 This portfolio contains the program office portfolios that will be submitted for BY2009	BY2009	Agency	Final	Admin1, eCPIC
application and data hosting/housing	application and data hosting/housing	BY2007	Mission Area	Alternate	Admin, System
BJC CBA Systems Consolidated Investments Portfolio	The BJC Contractor Business Administrative (CBA) Systems Consolidated Investments Portfolio contain the subinvestments that roll up into the BJC CBA investment.	BY2005	Staff Office	Draft	Admin, System
BJC Mission Systems Consolidated Investments Portfolio		BY2005	Staff Office	Draft	Admin, System

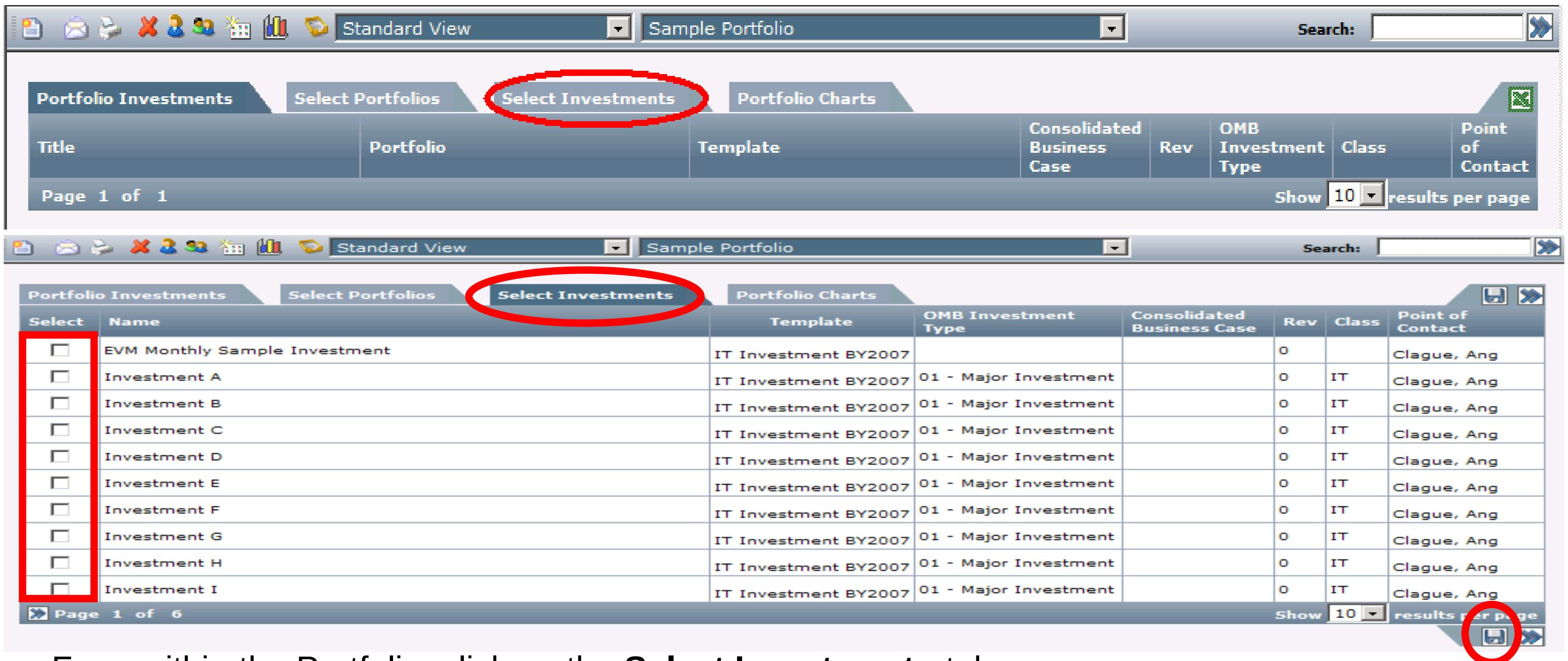
- The **Portfolio** module allows users to group investments into one or more portfolio categories. A user will be able to perform aggregate reporting across multiple investments and reporting.
- A user will only be able to view the portfolios they have access to.



- Utilizing the field filters will allow the user to search for specific portfolios more efficiently.

Portfolio Management

Selecting and De-Selecting Investments into a Portfolio

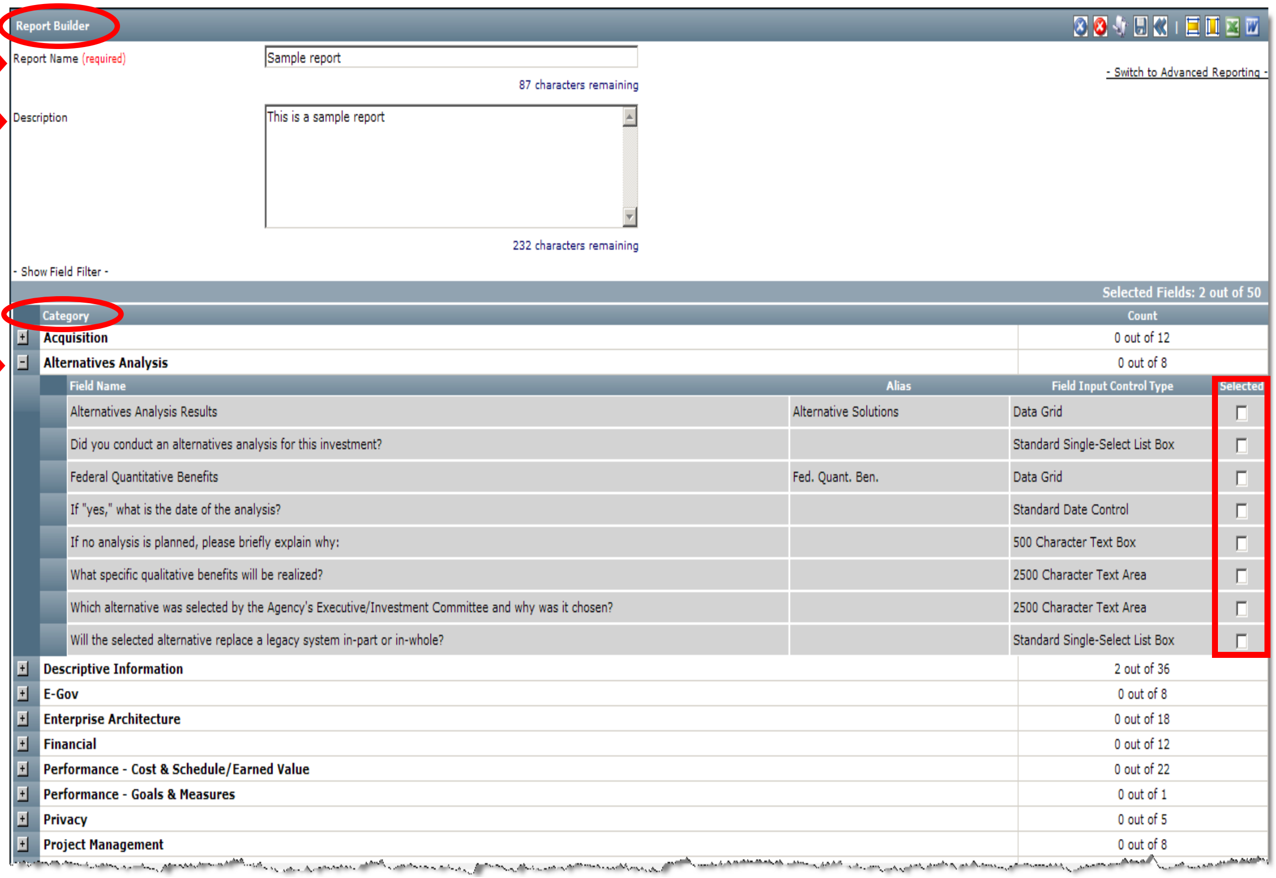


- From within the Portfolio, click on the **Select Investments** tab.
- The Select Investments screen will appear with a listing of all investments for which a user has access to.
- Check or uncheck the boxes for the investments that should be added or removed from the Portfolio and click **Save**.

Note: ONLY select a Consolidated Business Case (parent investment) into a portfolio. If the children investments are also selected into the portfolio, the funding will be double counted.

Customized Reporting
Report Builder Form

Once in the Reporting module, to add/build a custom report, click on the Add Report icon ( ). The Report Builder form will appear. Complete the required fields and select the desired field categories for the report.


Report Builder

Report Name (required): Sample report

87 characters remaining

- Switch to Advanced Reporting -

Description: This is a sample report

232 characters remaining

- Show Field Filter -

Selected Fields: 2 out of 50

Category	Count
Acquisition	0 out of 12
Alternatives Analysis	0 out of 8

Field Name	Alias	Field Input Control Type	Selected
Alternatives Analysis Results	Alternative Solutions	Data Grid	
Did you conduct an alternatives analysis for this investment?		Standard Single-Select List Box	
Federal Quantitative Benefits	Fed. Quant. Ben.	Data Grid	
If "yes," what is the date of the analysis?		Standard Date Control	
If no analysis is planned, please briefly explain why:		500 Character Text Box	
What specific qualitative benefits will be realized?		2500 Character Text Area	
Which alternative was selected by the Agency's Executive/Investment Committee and why was it chosen?		2500 Character Text Area	
Will the selected alternative replace a legacy system in-part or in-whole?		Standard Single-Select List Box	

Category	Count
Descriptive Information	2 out of 36
E-Gov	0 out of 8
Enterprise Architecture	0 out of 18
Financial	0 out of 12
Performance - Cost & Schedule/Earned Value	0 out of 22
Performance - Goals & Measures	0 out of 1
Privacy	0 out of 5
Project Management	0 out of 8

Customized Reporting

Generating and Exporting Reports

- Once a user has created the report with the criteria needed, they can save, run and export it to MS Word or MS Excel formats.

Edit Report		Report Name	Report Description	Owner	Public	Created Date	Vertical Report		Horizontal Report	
Basic	Adv	Consolidated Infrastructure Report	Displays Financial information for all infrastructure investments that are in the Consolidated Infrastructure	Lapato, Brian	No	11/30/2007 06:40 PM	Run		Run	
Basic	Adv	E-Gov Report	Reports on Investments that have submitted E-Gov data	Lapato, Brian	No	11/30/2007 06:37 PM	Run		Run	
Basic	Adv	EA Report	Displays the EA (SRM, TRM and PRM) mappings for each investment	Lapato, Brian	No	11/30/2007 06:36 PM	Run		Run	
Basic	Adv	Financial Balance Report	Report consisting of all investments that are more than $5K out of balance between SOS and Funding Source tables	Lapato, Brian	No	11/30/2007 06:38 PM	Run		Run	
Basic	Adv	Financial Report	Displays the Spending and Funding information for the Budget Year.	Lapato, Brian	No	11/30/2007 06:35 PM	Run		Run	

Page 1 of 2 Show 5 results per page

FEA BRM

Investment Name	Rev	Template Name	FEA BRM
Demo Investment 1	1	BY2008	
Demo Investment 2	1	BY2008	
A Monthly EVMS Example Investment	4	BY2009	see table below
BY2009 Investment	3	BY2009	
CBC Investment A	2	BY2009	see table below

A Monthly EVMS Example Investment:

BRM FEA Code	Line Of Business	BRM FEA Code	Sub Function	Primary Mapping to BRM	Send To OMB
202	Knowledge Creation and Management	202071	Advising and Consulting	False	true
105	Economic Development	105012	Intellectual Property Protection	False	true
310	Legislative Relations (Cross-Agency)	310156	Congressional Liaison Operations (Cross-Agency)	False	true
106	Education	106999	None	False	true
303	Legislative Relations	303097	Legislation Tracking	False	true
406	Administrative Management (Cross-Agency)	406999	None	True	true

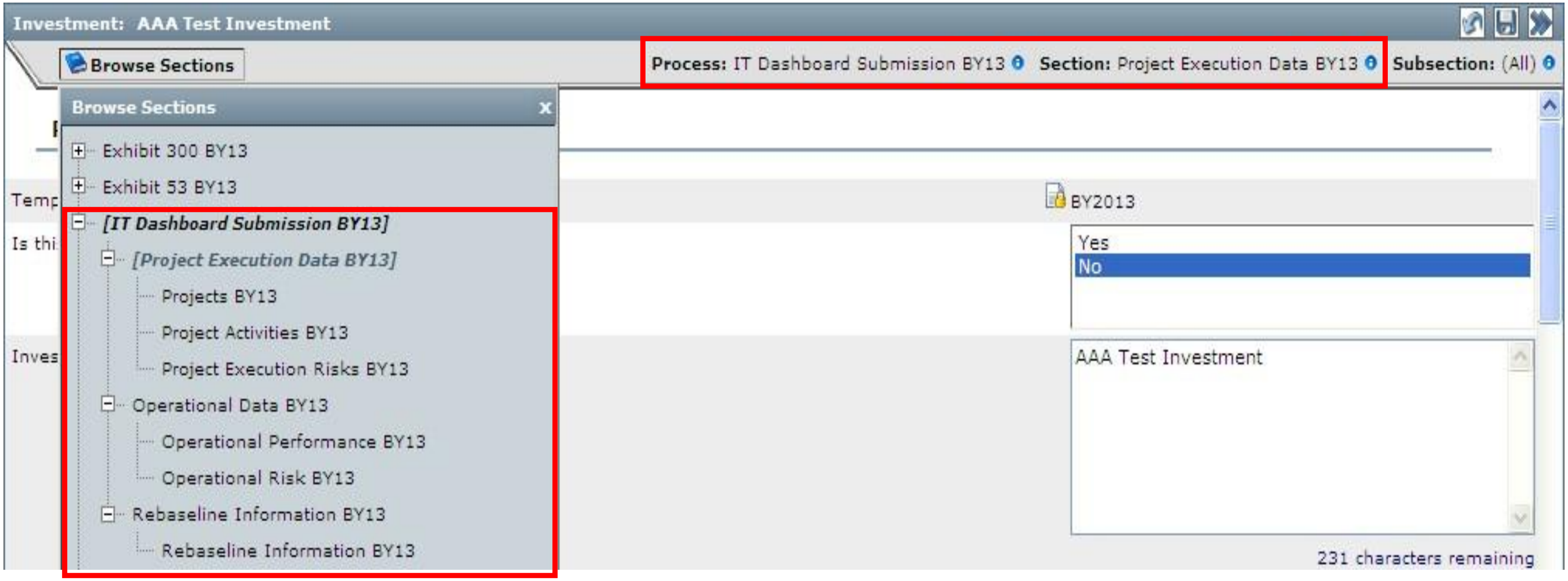
CBC Investment A:

BRM FEA Code	Line Of Business	BRM FEA Code	Sub Function	Primary Mapping to BRM	Send To OMB
401	Administrative Management	401122	Travel	True	False
402	Financial Management	402126	Payments	False	True
404	Information and Technology Management	404142	Information Management	False	True
402	Financial Management	402129	Reporting and Information	False	True

Page 1 of 6 Show 5 results per page

IT Dashboard Functionality

Accessing the IT Dashboard Submission form in eCPIC

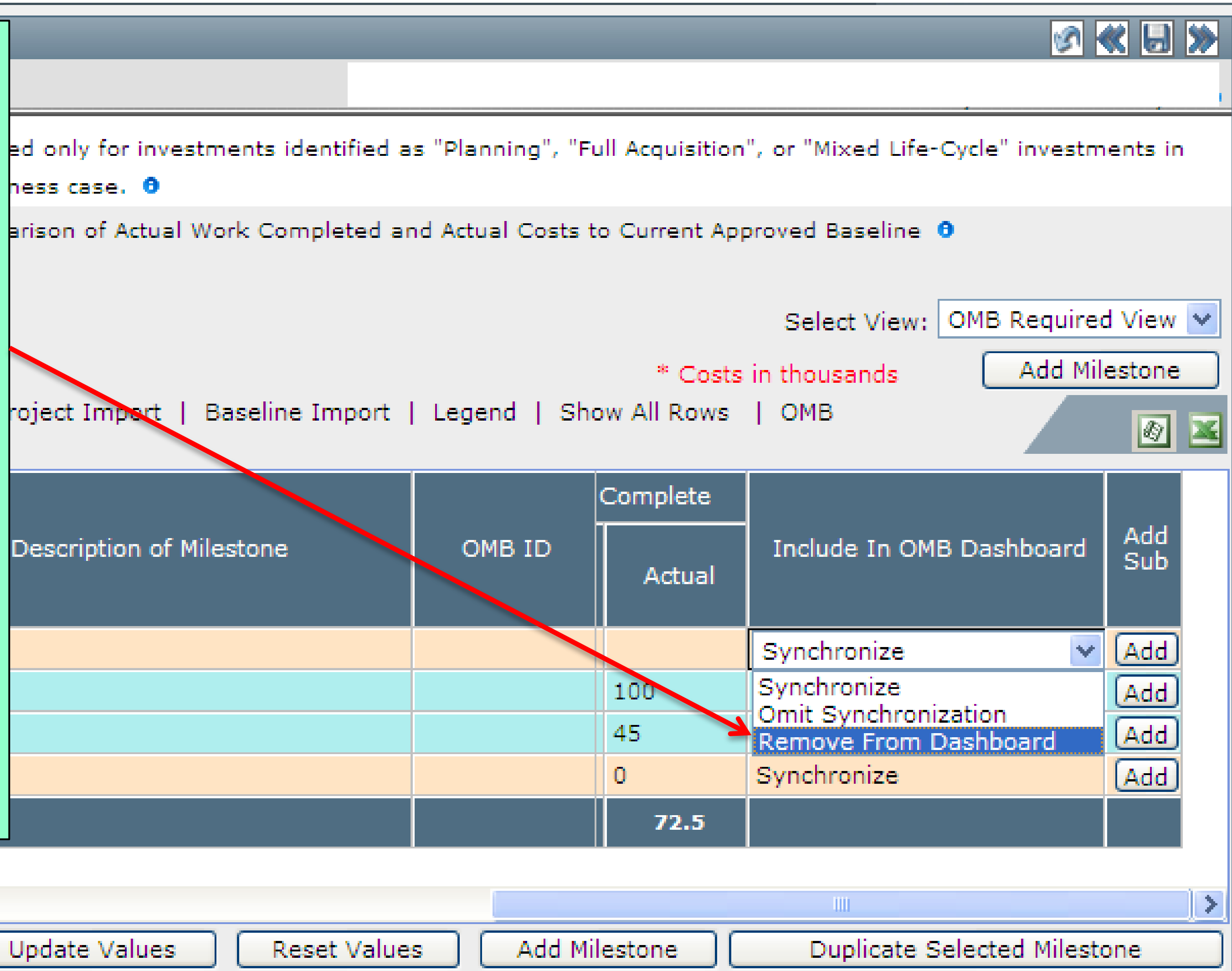


- To make updates to the IT Dashboard information from within eCPIC, users can access the IT Dashboard Submission from under “Browse Sections.” These Exhibit 300 data fields are linked directly to the OMB’s IT Dashboard.
- All users that have access to the Exhibit 300 form will also have access to the IT Dashboard Submission form.

IT Dashboard Functionality

Remove from Dashboard

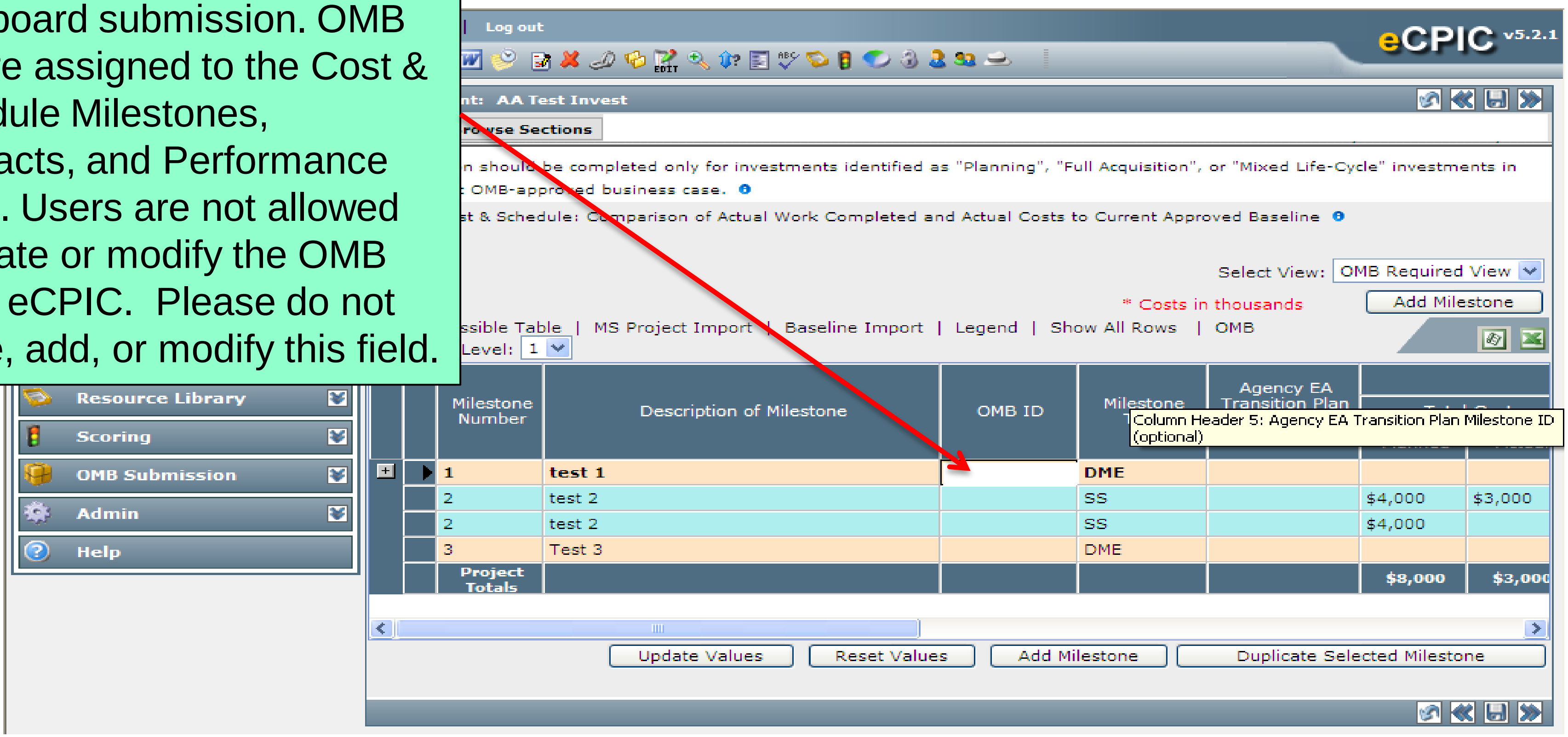
To remove milestones, performance goals, or contracts from the IT Dashboard (ITDB), select the “remove from Dashboard” function. Then click “update values”. Once the data is transmitted to the ITDB, the items will be noted as removed on the ITDB. Please delete the items in eCPIC after the monthly submission, so the items are no longer reported.



IT Dashboard Functionality

OMB Identification Number

OMB IDs are assigned by OMB during the monthly system to system IT Dashboard submission. OMB IDs are assigned to the Cost & Schedule Milestones, Contracts, and Performance Goals. Users are not allowed to create or modify the OMB IDs in eCPIC. Please do not delete, add, or modify this field.



Questions

If you have any questions, feel free to contact us at ecpic@hq.doe.gov or at the help desk at (202) 586-5437.