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.

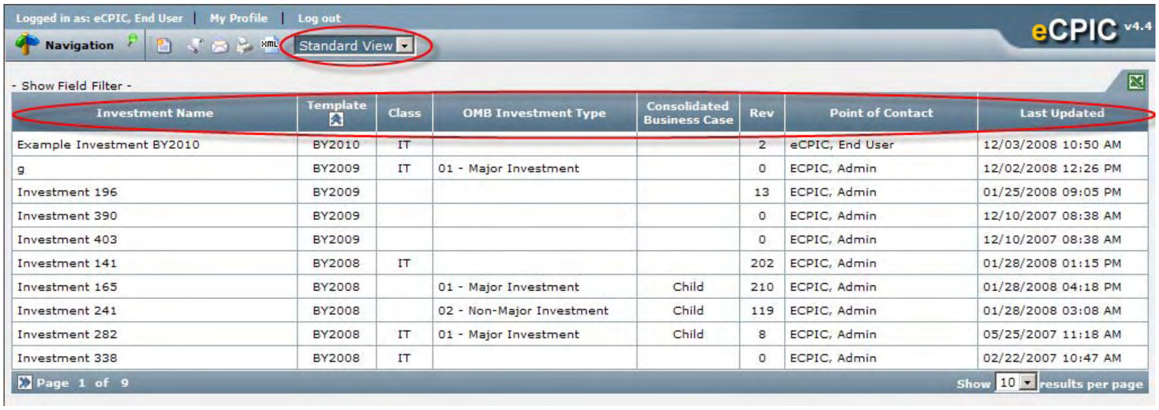
Parent Investment	Child Investment
CBC Parent Investment 2	CBC Child 2

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.



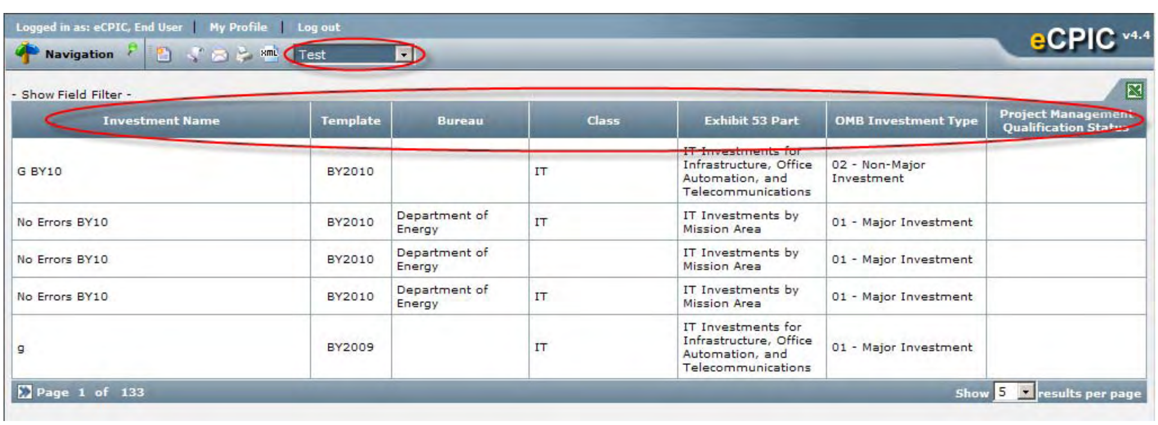
Within the Investments module, the columns containing the set of data entry fields that will appear can be changed.

3. Click the down arrow on the **View** drop-down to reveal custom views that have been created in the eCPIC application. *('Views' are created by the System Administrator*).

View List Menu

4. Select a new **View** from the drop-down.

The screen will refresh to display a new view of fields.



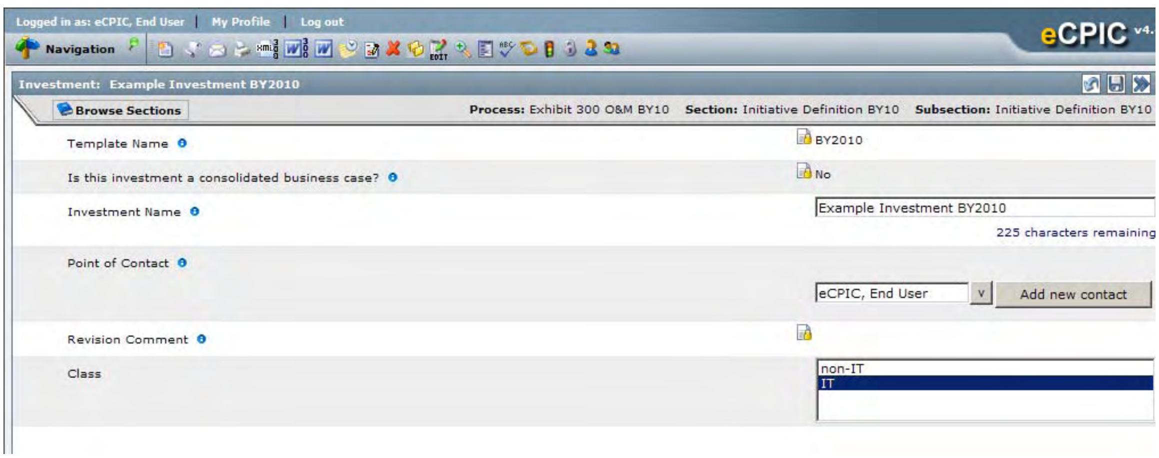
Note: The results can be sorted by clicking on the column header. This will sort the results in ascending order. An arrow will appear next to the header indicating the column that is being sorted. Click on the arrow or heading again and the results will be sorted in descending order.

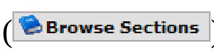
4.5 Updating Investment Data

eCPIC allows users to manage their investments throughout its life cycle. Users can continually update information for investments that they have access to.

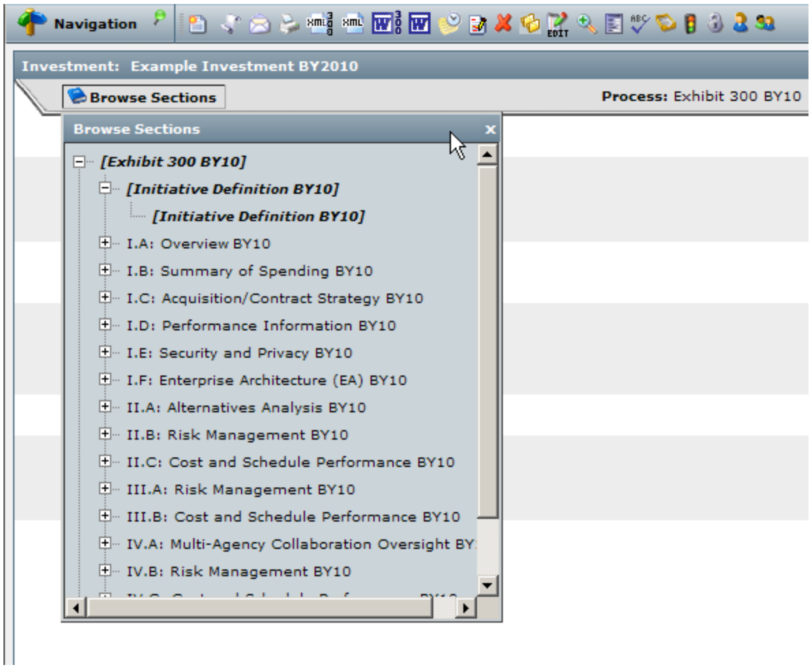
1. Click on the **Investments** module.

2. Click on the **Investment Name**.
The screen will refresh showing the first section and sub-section of the process selected.

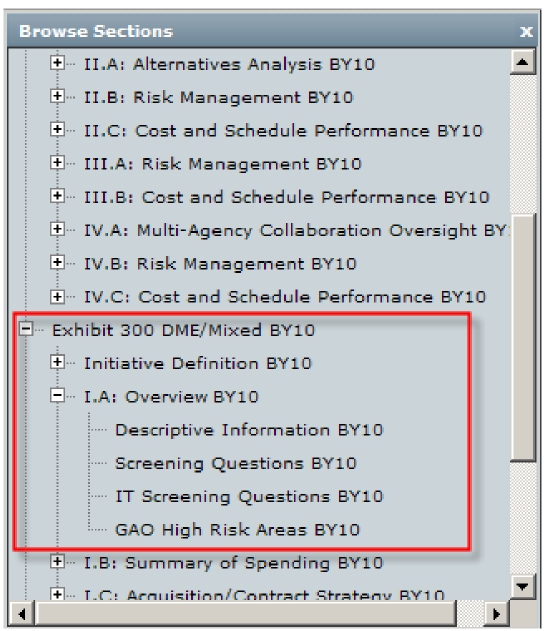


3. Click on the browse section (

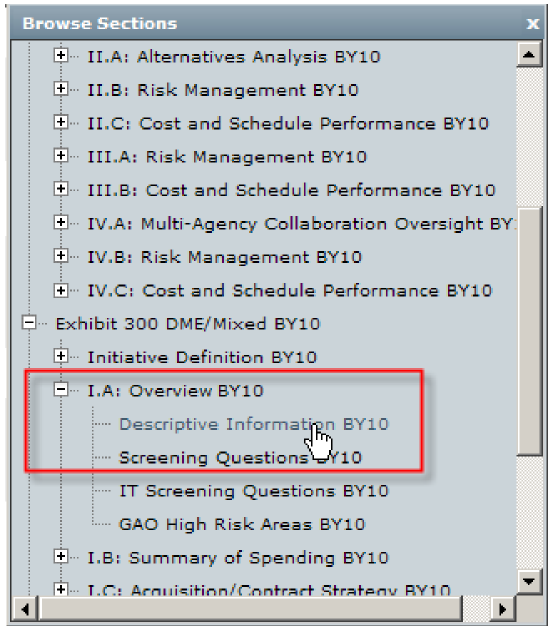
) icon to open the process browser. The list of available processes will be displayed below in a tree format,



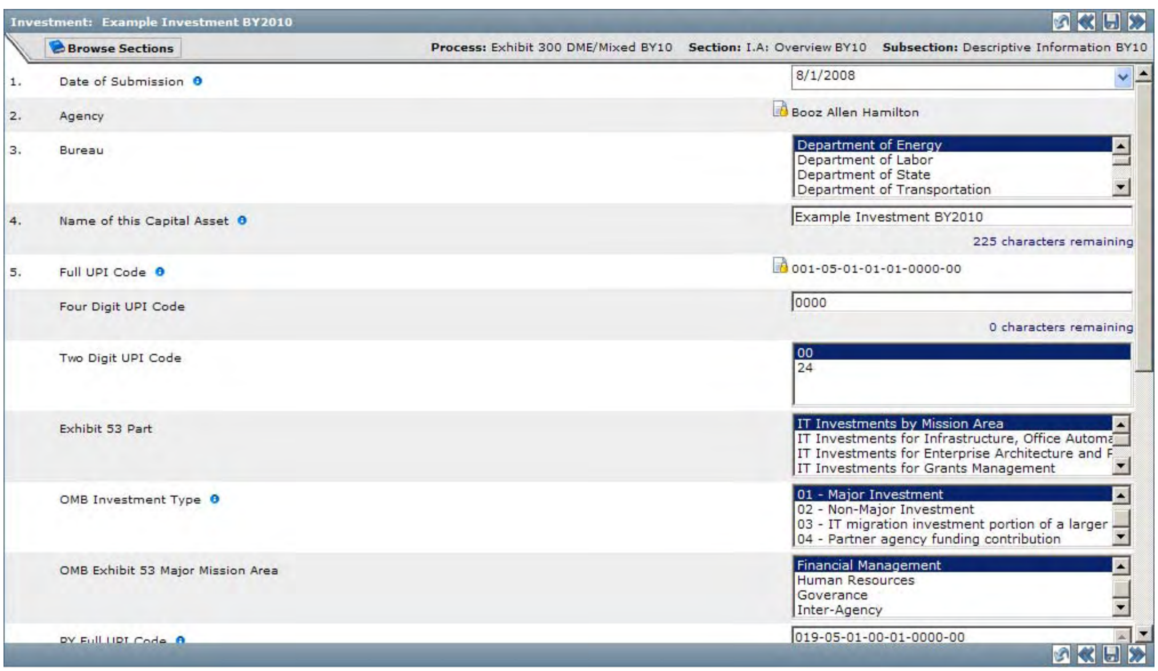
4. Click on the (⊞) icon to expand a process and view the sections under that process. Likewise, clicking on the (⊞) for each section will display all of the subsections under that section



5. To navigate to a section or sub-section click on the name



6. The selected section or subsection will display



7. Click on the **Next** arrow to save information to the database and proceed to the next section of fields. Can also choose to just **Save** the information without moving forward, or click the **Back** arrow to go back to the previous screen, or **Undo** to remove all data entered.

4.6 Generating Exhibit 300 XML

eCPIC offers the ability to generate the Exhibit 300 in a XML format. The XML 300 icon will export the Exhibit 300 based on the OMB schema. System Administrators have the capability to export OMB and Agency-defined fields.

To Generate the XML 300 document:

1. From within an investment, click the **XML 300** icon in the toolbar.

A Validation report will appear:

Count	Type	XML Errors	Location(s) in the Workflow (Section - SubSection)
1	Error	The 'What kind of investment will this be in this Budget Year?' field has an invalid value according to its data type. The exported value is 'Full Acquisition'	I.A: Overview BY09 - Descriptive Information BY09
2	Error	The 'What was the first budget year this investment was submitted to OMB?' field has an invalid value according to its data type. This field cannot be blank	I.A: Overview BY09 - Screening Questions BY09
3	Error	The 'What is the current FAC-P/PM certification level of the project/program manager?' field has an invalid value according to its data type. This field cannot be blank	I.A: Overview BY09 - Screening Questions BY09
4	Error	The 'Has the agency developed and/or promoted cost effective, energy efficient and environmentally sustainable techniques or practices for this project.' field has an invalid value according to its data type. This field cannot be blank	I.A: Overview BY09 - Screening Questions BY09
5	Error	The 'Will this investment include electronic assets (including computers)?' field has an invalid value according to its data type. This field cannot be blank	I.A: Overview BY09 - Screening Questions BY09
6	Error	The 'Does this investment directly support one of the PMA initiatives?' field has an invalid value according to its data type. This field cannot be blank	I.A: Overview BY09 - Screening Questions BY09
7	Error	The 'Does this investment support a program assessed using the Program Assessment Rating Tool (PART)? (For more information about the PART, visit www.whitehouse.gov/omb/part.)' field has an invalid value according to its data type. This field cannot be blank	I.A: Overview BY09 - Screening Questions BY09

Within eCPIC, there are certain business rules that are ran against the data in the investment. The Validation report will allow users to see what data is not filled out correctly or is missing.

This method ensures that all information is valid according to OMB before generating the XML document. The report list how many issues were found, the type of problem, a description of the problem, and the section and sub-section the problem is located.

There are two types of problems that can be found from this report.

Schema Validation: This problem is classified as an **Error**. *Errors* will keep users from generating the XML. Users 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, it will assist them in reviewing the business case for issues that may need to be reviewed.

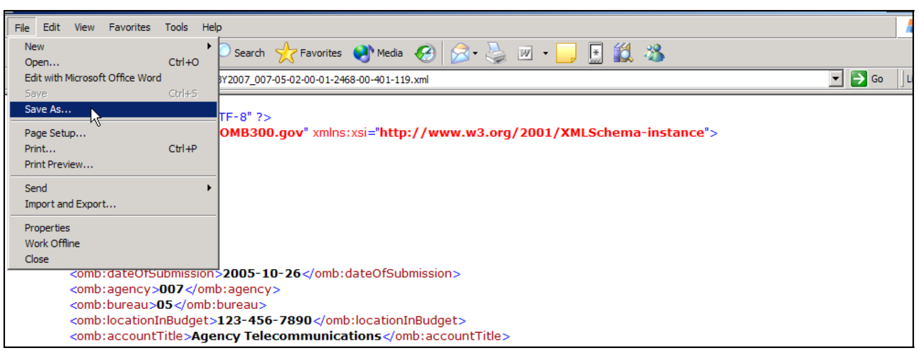
***A list of Business Rules can be found in the **List Business Rules** section of this guide.*

2. Once the investment has passed the validation, the XML 300 document can be generated. From within the new pop-up window, click on the **Export XML** icon (xml).

The XML document will be presented in the same window.

3. From within the XML window, click on **File**.

4. Select **Save As** to save the XML document.



4.7 Investment Revisions

A Revision is created whenever an investment is being finalized. Users can finalize an investment to move it to a new Budget Year or to simply close it out in the same Budget Year if no further modifications will be required or if numerous modifications have been made and a newer version is needed.

To have access to the new template so that all OMB required fields for that Budget Year can be answered for the investment, a revision will have to be made. Each time a new Budget Year is introduced, the application supports the added template. So, if the

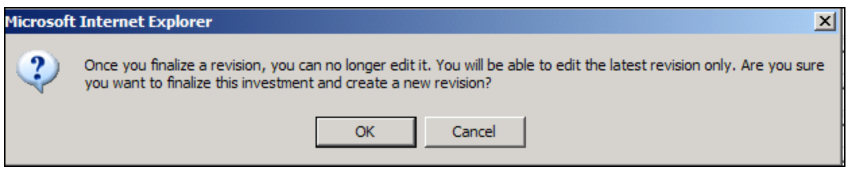
BY2009 template is introduced, with each template containing the OMB required fields for that Budget Year as well as any agency specific processes that have been developed.

4.7.1 Creating an Investment Revision

To Create a Revision:

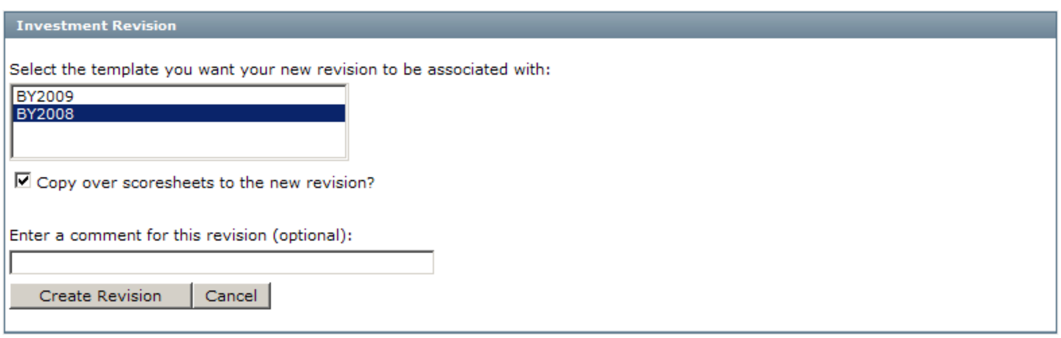
1. From within the investment that will be finalized, click on the **Investment Revision** icon in the toolbar.

A message will appear warning users that once a revision is finalized, it can no longer be edited. *Make sure the investment is ready to be finalized*.



Note: A finalized investment can no longer be edited, but will be available for viewing through the Investments module.

2. Select **OK** if the investment is ready to be finalized. The Investment Revision form will appear:



3. Select the **template** the revision will be in. Select the **same template** if the investment is finally being closed out and no further modifications will be required, or if there have been numerous modifications made and a newer version is needed. If you wish to move the Investment to the **next budget year template**, you may select that template from the list.

Note: Once an investment is moved into the new budget year process, it cannot revert back to the previous Budget Year's template. Users would never see the