

7. SCORING

To assist with rating and assessing investments, a scoring module has been incorporated into the eCPIC application. System Administrators have the ability to create Scorecards. Scorecards define what users are grading their investment on and provide the template for individual assessments, known as Scoresheets. Agencies are not limited to the number of scorecards they create. Within the Scorecard, System Administrators define what scoring data is going to be collected and define the scoring fields. The fields that are being scored can either be an OMB-defined field or an Agency-defined field. Each field that is added to a Scorecard must be of a numeric data type.

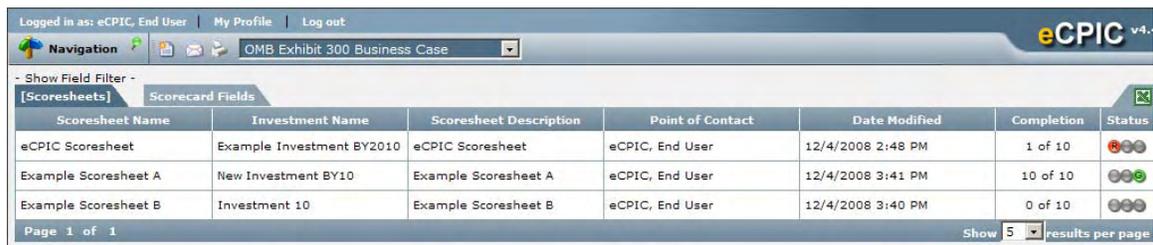
For each Scorecard created, a boundary is set to evaluate the status of what the Agency is scoring. The System Administrator sets the boundaries for each field as well as for the overall Scorecard. The boundaries show a  (low),  (medium) or  (high) visual indicator to help users identify the status of each individual rating.

Once a Scorecard is created, users that have the ‘Create’ RIGHT for scoring can create Scoresheets that will be used to assess against the Scorecard criteria per investment.

7.1 Overview

The scoring module contains 4 areas: Scoresheets, Scorecard Fields, Authoritative Record, and Scorecard Dashboard. Non-System Administrators only have access to Scoresheets and Scorecard Fields, while System Administrators have access to all four areas. Each area has its own tab within the Scoring Module.

Non-System Administrators will see the following inside a Scorecard in the Scoring Module:



Scoresheet Name	Investment Name	Scoresheet Description	Point of Contact	Date Modified	Completion	Status
eCPIC Scoresheet	Example Investment BY2010	eCPIC Scoresheet	eCPIC, End User	12/4/2008 2:48 PM	1 of 10	
Example Scoresheet A	New Investment BY10	Example Scoresheet A	eCPIC, End User	12/4/2008 3:41 PM	10 of 10	
Example Scoresheet B	Investment 10	Example Scoresheet B	eCPIC, End User	12/4/2008 3:40 PM	0 of 10	

7.2 Create a Scoresheet

Scoresheets are separate instances of the Scorecard template. Scoresheets will be used to assess against a Scorecard created by the System Administrator. Users with the proper permissions can score investments using a Scoresheet(s). An unlimited amount of Scoresheets can be created. Each Scoresheet is associated with an investment(s) and must have a distinct name.

For example, there may be 4 people all scoring for the same Scorecard. In this case, each user that is scoring and has the 'Create' RIGHT for scoring, can create a scoresheet to grade each of the desired investment(s).

To Create one or more scoresheets:

1. Click on the **Scoring** module. A list of all the Scorecards available will appear:

- Show Field Filter -			
Scorecard Name	Scorecard Description	Point of Contact	Date Modified
Agency Scorecard	Agency Scorecard	eCPIC, Admin	01/24/2006 10:04 AM
DOE Value-Health Framework	DOE Value-Health Framework	eCPIC, Admin	03/23/2006 02:47 PM
DRAFT 2008 Select Scoring		eCPIC, Admin	02/16/2006 12:40 AM
DRAFT Infrastructure Evaluation Form	Captures and evaluates infrastructure requirements for HUD's IT initiatives	eCPIC, Admin	02/16/2006 12:55 AM
EA Assessment Scorecard	EA Assessment Scorecard	eCPIC, Admin	01/24/2006 10:03 AM

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2. Click on the **Scorecard Name**.

The Scoresheets screen will appear showing an access based listing of all Scoresheets that are associated with the current Scorecard. The view will list the Scoresheet Name, Investment Name, Scoresheet Description, Point of Contact, the Date Modified, the Completion, and the Overall Status of each assessment. If a particular Scoresheet is used for several investments, then that Scoresheet will be listed for each investment it is associated with.

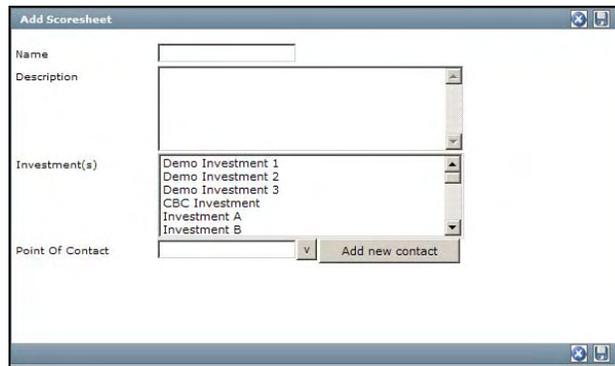
- Show Field Filter -						
[Scoresheets]		Scorecard Fields				
Scoresheet Name	Investment Name	Scoresheet Description	Point of Contact	Date Modified	Completion	Status
eCPIC Scoresheet	Example Investment BY2010	eCPIC Scoresheet	eCPIC, End User	12/4/2008 2:48 PM	1 of 10	
Example Scoresheet A	New Investment BY10	Example Scoresheet A	eCPIC, End User	12/4/2008 3:41 PM	10 of 10	
Example Scoresheet B	Investment 10	Example Scoresheet B	eCPIC, End User	12/4/2008 3:40 PM	0 of 10	

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The *Status* will appear as grey if no scoring has been conducted (unless one of the fields is set to 'Auto Score', then it will appear as red). This allows for easy viewing of diverging business case scores leading to a quick and easy view of the overall business case status. The *Completion* column will aid users in identifying the amount completed within each assessment and therefore, identify which scoresheets are red due to being incomplete, or red because of poor scores.

Note: Please see the Admin Guide for additional information on defining Scorecards and setting scorecard fields to 'Auto Score.'

3. Click on the **New Scoresheet** icon  in the Scoresheets toolbar. The Add Scoresheet form will appear:

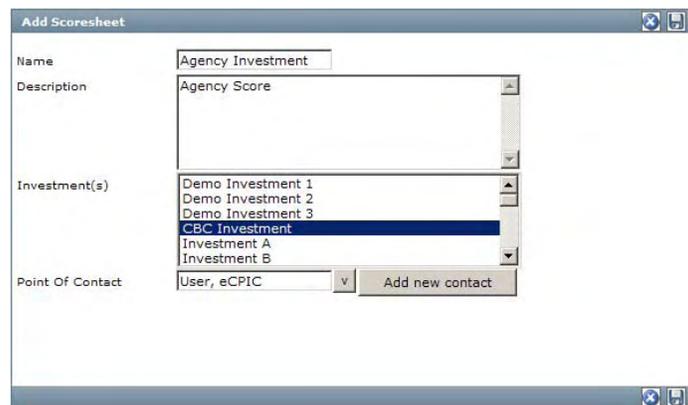


4. Type in a distinct **Name** for the Scoresheet.
5. Type in a **Description** of the Scoresheet.
6. Select the Investment(s) for which a new scoresheet will be created.

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

Note: When editing a Scoresheet, users will NOT be able to associate a new investment to the current Scoresheet. Users will have to create a new Scoresheet if that plan to assess a different investment.

7. Enter the **Point of Contact**. Click on the drop-down arrow to make a selection. 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 current user will be used.



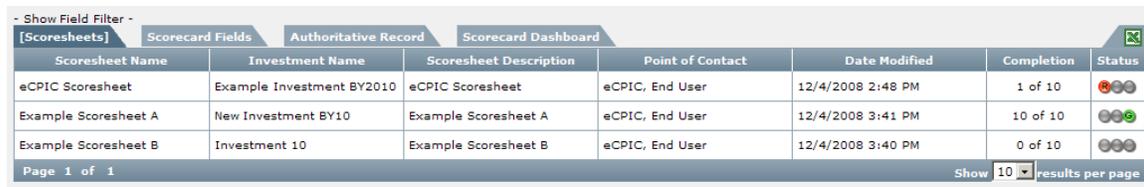
- Click on **Save**  to save information or **Next**  to save data and return to the list of Scoresheets for the Scorecard. A Scoresheet with the entered Name will be created for each investment that was selected. Can also choose **Cancel**  to cancel this operation.

7.3 Scoring Investments

There are two methods to score investments: from within the **Scoring** Module or Inline Scoring within the **Investment** Module.

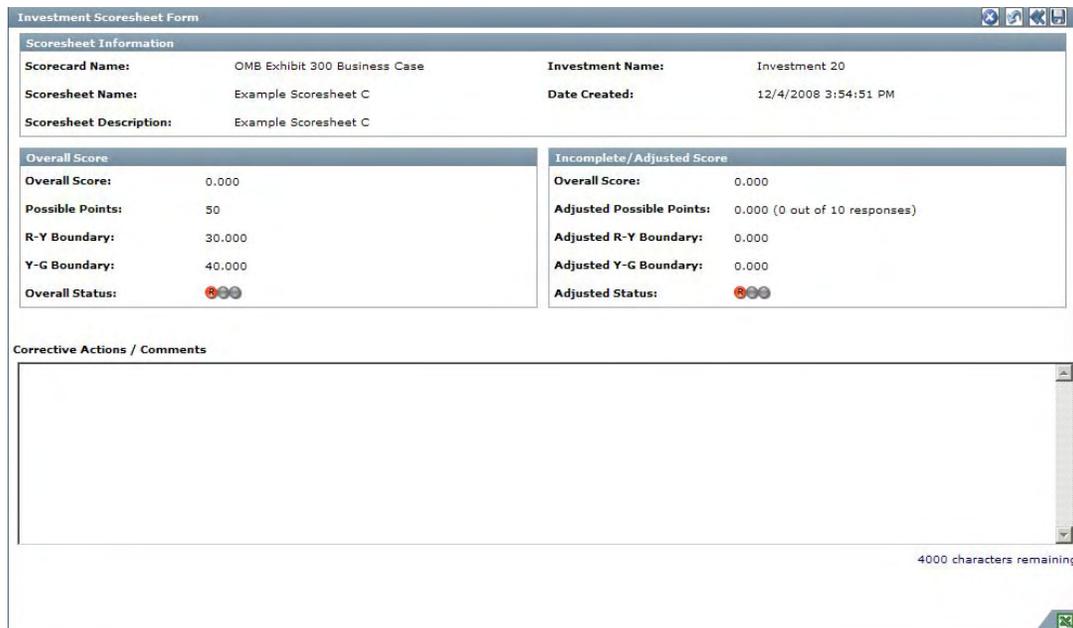
7.3.1 Score Investments from the Scoring Module

- Click on the **Scoring** module.
- Click on the **Scorecard Name**. The Scoresheets screen will appear:



Scoresheet Name	Investment Name	Scoresheet Description	Point of Contact	Date Modified	Completion	Status
eCPIC Scoresheet	Example Investment BY2010	eCPIC Scoresheet	eCPIC, End User	12/4/2008 2:48 PM	1 of 10	
Example Scoresheet A	New Investment BY10	Example Scoresheet A	eCPIC, End User	12/4/2008 3:41 PM	10 of 10	
Example Scoresheet B	Investment 10	Example Scoresheet B	eCPIC, End User	12/4/2008 3:40 PM	0 of 10	

- Click on the **Scoresheet Name** for the Scoresheet that will be scored in order to access that particular assessment. The Investment Scoresheet form will appear:



Investment Scoresheet Form

Scoresheet Information

Scorecard Name: OMB Exhibit 300 Business Case Investment Name: Investment 20
 Scoresheet Name: Example Scoresheet C Date Created: 12/4/2008 3:54:51 PM
 Scoresheet Description: Example Scoresheet C

Overall Score		Incomplete/Adjusted Score	
Overall Score:	0.000	Overall Score:	0.000
Possible Points:	50	Adjusted Possible Points:	0.000 (0 out of 10 responses)
R-Y Boundary:	30.000	Adjusted R-Y Boundary:	0.000
Y-G Boundary:	40.000	Adjusted Y-G Boundary:	0.000
Overall Status:		Adjusted Status:	

Corrective Actions / Comments

4000 characters remaining

Field Name	Parent / Child	Status	Rating	Weight	Score	Rationale
Exhibit 300 Scoring: Acquisition Strategy	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Alternatives Analysis	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Enterprise Architecture	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Life Cycle Costs Formulation	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Performance Based Management System	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Performance Goals	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Program Management	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		
Exhibit 300 Scoring: Risk Management	Parent	●●●	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1		

The screen will consist of the following:

Scoresheet Information: The Scoresheet Name, Scoresheet Name, Description, and Investment Name it is associated with, and the Date the Scoresheet was created. Scoresheets with Auto Score fields will default to a status of  prior to any scoring taking place.

Overall Score: The Current Scoresheet Score (*the total points each field accumulated*), the total possible points for the scorecard, the R-Y and Y-G boundaries that were set by the System Administrator, and the Overall Scoresheet Status (*red, yellow or green*). The boundaries show a  (low),  (medium) or  (high) visual display to help users identify the status of each individual rating.

Incomplete/Adjusted Score: The Current Scoresheet Score (*the total points each field accumulated*), the total possible points for the scorecard for the assessment fields that have been answered, the adjusted R-Y and Y-G boundaries based upon values set by the System Administrator and the number for assessments fields answered, and the Adjusted Scoresheet Status (*red, yellow or green*). The boundaries show a  (low),  (medium) or  (high) visual display to help users identify the status of each individual rating.

Note: The Incomplete/Adjusted Score section will only display if the scoresheet is incomplete.

Corrective Actions/Comments: A narrative of corrective actions that can be taken to improve the investment or status of the assessment and any other comments the scorer feels should be provided. There is a 4000 character limit.

Scoresheet Fields:

- **The Field Name:** The field that displays the data that is being scored.
- **Parent/Child:** In Scoring, users have the ability to add a Child field to a Parent. By default all fields are Parents. In scoring, all children fields values roll up to a weighted Average or Summed value to the Parent field.

Note: There are areas of the application where the average of fields may be taken (for example for parent fields). If users want the exact average for a field, their field must be of data type ‘Decimal’. If their field is of data type ‘Integer’, the average value will be rounded to the nearest integer. Field Types are designated by the System Administrator.

- **Status:** The Status will be , , or  once the field has been scored. *The status will appear in grey if the scoresheet has not been scored and there are no Auto Score fields.*
 - **Rating:** The Rating of a field is the scorer’s assessment or answer to the designated field.
 - **Weight:** The Weight of the field is the System Administrative set value used to define the level of importance the scoring field has within the scorecard.
 - **Score:** The score is based on the scorer’s rating multiplied by the set weight for the field.
 - **Rationale:** The reasoning the scorer provides for giving the rating that he/she did. There is a 5000 character limit. *(The Zoom and Spell Check feature can be used in these Text Boxes, however, the Spell Check feature will check all the Rationale boxes on the Scoresheet).*
4. For each field, enter or select a score based on the criteria given. Also, enter a Rationale if a comment or justification is needed for the given score.

Note: Because Scoring is based on rating data, all values entered will be an Integer or Decimal. Therefore, there is a numerical answer associated with each display value in selection control types. These numerical values are specified by the System Administrator.

Investment Scoresheet Form

Scoresheet Information
 Scoresheet Name: Project Mangers Score Investment Name: Consolidated Business Case.
 Scoresheet Description: Group Score. Date Created: 11/3/2005 11:54:40 AM.

Scorecard Information
 R-Y Boundry: 30 Y-G Boundry: 40

Scoresheet Status
 Current Scoresheet Score: 29 Overall Scoresheet Status:

Corrective Actions / Comments
 Some areas of work are noted.

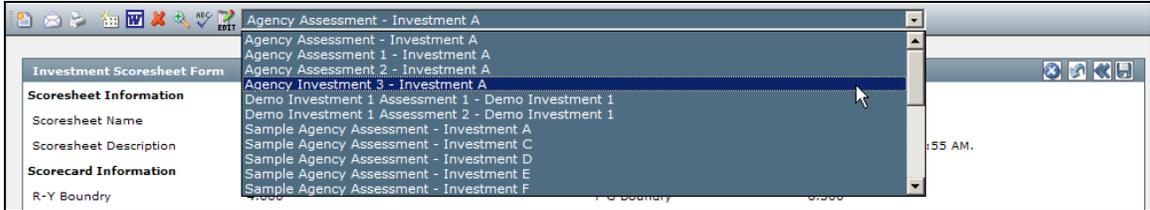
Field Name	Parent / Child	Status	Rating	Weight	Score	Rationale
Exhibit 300 Scoring: Acquisition Strategy	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	3	Needs more work
Exhibit 300 Scoring: Alternatives Analysis	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	2	
Exhibit 300 Scoring: Enterprise Architecture	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	3	
Exhibit 300 Scoring: Life Cycle Costs Formulation	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	4	
Exhibit 300 Scoring: Performance Based Management System	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	4	
Exhibit 300 Scoring: Performance Goals	Parent		1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1	1	Initial Stage
Exhibit 300 Scoring: Program Management	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	4	
Exhibit 300 Scoring: Risk Management	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	3	
Exhibit 300 Scoring: Security and Privacy	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	3	
Exhibit 300 Scoring: Supports the President's Management Agenda Items	Parent		2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	2	Needs more work

Note: From within the Scoresheet, any parent field or Auto Score field will be disabled as their value is dependent upon child fields or investment workflow answers, respectively.

- Click **Save** to save the data and refresh the screen. Click **Save and Back** to save the data and return to the *Scoresheets* screen. Click **Cancel** to erase any data entered and refresh the screen or click **Undo** to undo any data entered and return to the *Scoresheets* screen.

Once the Scoresheet has been assessed, the Status in the Scoresheets screen will reflect the Overall Status of the Scoresheet.

Note: To jump to a different Scoresheet associated with the Scorecard, use the Scoresheet drop-down list.



7.3.2 Inline Scoring

For information on Inline Scoring, please refer to the Inline Scoring section in the Investments module section of the User Guide.

7.4 Edit General Information

To change general information about the Scoresheet such as the Scoresheet Name, Scoresheet Description, Comments/Corrective Actions or Point of Contact:

1. Click on the **Scoring** module.
2. Click on the **Scorecard Name** that contains the Scoresheet that will be edited. The scoresheets screen will appear:

Scoresheet Name	Investment Name	Scoresheet Description	Point of Contact	Date Modified	Completion	Status
eCPIC Scoresheet	Example Investment BY2010	eCPIC Scoresheet	eCPIC, End User	12/4/2008 2:48 PM	1 of 10	
Example Scoresheet A	New Investment BY10	Example Scoresheet A	eCPIC, End User	12/4/2008 3:41 PM	10 of 10	
Example Scoresheet B	Investment 10	Example Scoresheet B	eCPIC, End User	12/4/2008 3:40 PM	0 of 10	
Example Scoresheet C	Investment 20	Example Scoresheet C	eCPIC, End User	12/4/2008 3:54 PM	0 of 10	

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3. Click on the **Scoresheet Name** that will be edited.
4. From within a Scoresheet, click on the **Edit Scoresheet** icon (). The Edit Scoresheet form will appear:

5. Make appropriate changes.
6. Click **Save**  to save the changes. Clicking on the **Next** arrow  will save information and return to the *Scoresheets* screen. Click **Cancel**  to cancel the operation. Click **Delete**  to delete the scoresheet.

Note: When editing a Scoresheet, users will NOT be able to associate a new investment to the current Scoresheet. Users will have to create a new Scoresheet if they plan to assess a different investment.

7.5 Edit/View Toggle for Editing Scoring Data

When inside a Scoresheet, users have the ability to change the display of the Scoresheet data by using the Edit/View Toggle icon.

1. The Scoresheet will be in Edit mode by default if the user has update permissions to the Scoresheet. To switch to a 'View' mode, click on the **Edit** icon ().

Investment Scoresheet Form

Scoresheet Information

Scorecard Name:	OMB Exhibit 300 Business Case	Investment Name:	Investment 20
Scoresheet Name:	Example Scoresheet C	Date Created:	12/4/2008 3:54:51 PM
Scoresheet Description:	Example Scoresheet C		

Overall Score		Incomplete / Adjusted Score	
Overall Score:	0.000	Overall Score:	0.000
Possible Points:	50	Adjusted Possible Points:	0.000 (0 out of 10 responses)
R-Y Boundary:	30.000	Adjusted R-Y Boundary:	0.000
Y-G Boundary:	40.000	Adjusted Y-G Boundary:	0.000
Overall Status:		Adjusted Status:	

Corrective Actions / Comments

4000 characters remaining

The screen will now be in 'View' mode.

Investment Scoresheet Form

Scoresheet Information

Scorecard Name:	OMB Exhibit 300 Business Case	Investment Name:	Investment 20
Scoresheet Name:	Example Scoresheet C	Date Created:	12/4/2008 3:54:51 PM
Scoresheet Description:	Example Scoresheet C		

Overall Score		Incomplete / Adjusted Score	
Overall Score:	0.000	Overall Score:	0.000
Possible Points:	50	Adjusted Possible Points:	0.000 (0 out of 10 responses)
R-Y Boundary:	30.000	Adjusted R-Y Boundary:	0.000
Y-G Boundary:	40.000	Adjusted Y-G Boundary:	0.000
Overall Status:		Adjusted Status:	

Corrective Actions / Comments

Field Name	Parent / Child	Status	Rating	Weight	Score	Rationale
Exhibit 300 Scoring: Acquisition Strategy	Parent		3 (3- much work remains)	1	3	Needs more work
Exhibit 300 Scoring: Alternatives Analysis	Parent		2 (2- significant gaps)	1	2	
Exhibit 300 Scoring: Enterprise Architecture	Parent		3 (3- much work remains)	1	3	
Exhibit 300 Scoring: Life Cycle Costs Formulation	Parent		4 (4- very few weak points)	1	4	
Exhibit 300 Scoring: Performance Based Management System	Parent		4 (4- very few weak points)	1	4	
Exhibit 300 Scoring: Performance Goals	Parent		1 (1- no evidence)	1	1	Initial Stage
Exhibit 300 Scoring: Program Management	Parent		4 (4- very few weak points)	1	4	
Exhibit 300 Scoring: Risk Management	Parent		3 (3- much work remains)	1	3	
Exhibit 300 Scoring: Security and Privacy	Parent		3 (3- much work remains)	1	3	
Exhibit 300 Scoring: Supports the President's Management Agenda Items	Parent		2 (2- significant gaps)	1	2	Needs more work

2. To switch from a 'View' mode, click on the **View** icon ().

The screenshot shows the 'Investment Scoresheet Form' in 'Edit' mode. The browser title bar indicates 'Example Scoresheet C - Investment 20'. The form is divided into several sections:

- Scoresheet Information:**
 - Scorecard Name: OMB Exhibit 300 Business Case
 - Scoresheet Name: Example Scoresheet C
 - Scoresheet Description: Example Scoresheet C
 - Investment Name: Investment 20
 - Date Created: 12/4/2008 3:54:51 PM
- Overall Score:**
 - Overall Score: 0.000
 - Possible Points: 50
 - R-Y Boundary: 30.000
 - Y-G Boundary: 40.000
 - Overall Status:
- Incomplete/Adjusted Score:**
 - Overall Score: 0.000
 - Adjusted Possible Points: 0.000 (0 out of 10 responses)
 - Adjusted R-Y Boundary: 0.000
 - Adjusted Y-G Boundary: 0.000
 - Adjusted Status:
- Corrective Actions / Comments:** (Empty text area)

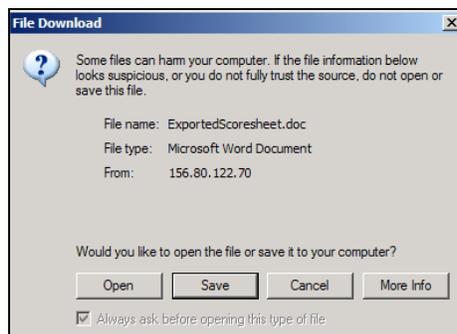
The screen will now be in 'Edit' mode and the user will be able to make modifications once again.

Field Name	Parent / Child	Status	Rating	Weight	Score	Rationale
Exhibit 300 Scoring: Acquisition Strategy	Parent	☹☹☹	2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	3	Needs more work
Exhibit 300 Scoring: Alternatives Analysis	Parent	☹☹☹	2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	2	
Exhibit 300 Scoring: Enterprise Architecture	Parent	☹☹☹	2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	3	
Exhibit 300 Scoring: Life Cycle Costs Formulation	Parent	☹☹☹	2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	4	
Exhibit 300 Scoring: Performance Based Management System	Parent	☹☹☹	2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	4	
Exhibit 300 Scoring: Performance Goals	Parent	☹☹☹	1- no evidence 2- significant gaps 3- much work remains 4- very few weak points	1	1	Initial Stage
Exhibit 300 Scoring: Program Management	Parent	☹☹☹	2- significant gaps 3- much work remains 4- very few weak points 5- strong evidence	1	4	

7.6 Export Scoresheet to Word

Within the Scoring module, users have the ability to export their Scoresheet to Word.

1. From within the Scoresheet, click on the Word icon ().
2. Some users may get a File Download warning. Select **Open** to retrieve the Word document or **Save** to save the document.



The Scoresheet will be exported to Word.

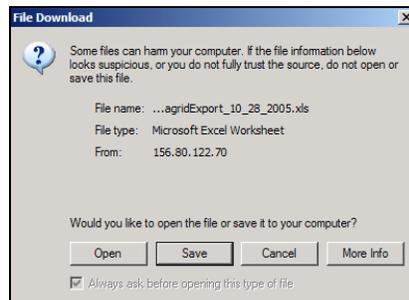
eCPIC Scoresheet: eCPIC Scoresheet - Scoresheet Report

Investment Scoresheet Form						
Scoresheet Information						
Scoresheet Name	eCPIC Scoresheet	Investment Name	BY2009 Investment			
Scoresheet Description	eCPIC Scoresheet	Date Created	6/18/2007 1:08:09 PM			
Scorecard Information						
R-Y boundary	4,000	Y-G boundary	6,500			
Scoresheet Status						
Current Scoresheet Score	6,500	Overall Scoresheet Status				
Corrective Actions / Comments						
Field Name	Parent / Child	Status	Rating	Weight	Score	Rationale
Investment Benefit	Parent		3.000000	1.000	3.000	
What level of benefits does this investment provide to the agency?	Child		3.000000	0.750	2.250	
What level of benefits does this investment provide to the program office?	Child		3.000000	0.250	0.750	
Investment Risk	Parent		3.500000	1.000	3.500	
How complete is the risk management plan for this investment?	Child		4.000000	0.500	2.000	
How well has the risk management plan been implemented?	Child		3.000000	0.150	0.450	
What is the level of perceived risk for this investment?	Child		3.000000	0.350	1.050	

7.7 Export Scoresheet to Excel

When exporting to Excel, only the scoring data will be exported.

1. From within the Scoresheet, click on the Excel icon (
2. Some users may get a File Download warning. Select **Open** to retrieve the Word document or **Save** to save the document.



The Scoresheet fields and data will be exported to Excel.

	A	B	C	D	E	F	G
1	Field Name	Parent / Child	Status	Rating	Weight	Score	Rationale
2	Investment Benefit	Parent	Green		3	1	3
3	What level of benefits does this investment provide to the agency?	Child	Green			0.75	2.25
4	What level of benefits does this investment provide to the program office?	Child	Green			0.25	0.75
5	Investment Risk	Parent	Green		3.5	1	3.5
6	How complete is the risk management plan for this investment?	Child	Green	More than 75%		0.5	2
7	How well has the risk management plan been implemented?	Child	Green	Above Expectations		0.15	0.45
8	What is the level of perceived risk for this investment?	Child	Green			0.35	1.05

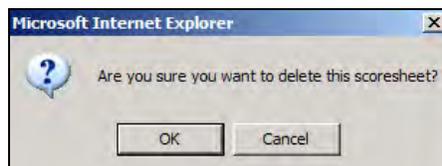
7.8 Delete Scoresheet

To Delete a Scoresheet:

1. Click on the **Scoring** module.
2. Click on the **Scorecard Name** that contains the Scoresheet that will be deleted and the Scoresheets screen will appear:

Scoresheet Name	Investment Name	Scoresheet Description	Point of Contact	Date Modified	Completion	Status
eCPIC Scoresheet	Example Investment BY2010	eCPIC Scoresheet	eCPIC, End User	12/4/2008 2:48 PM	1 of 10	
Example Scoresheet A	New Investment BY10	Example Scoresheet A	eCPIC, End User	12/4/2008 3:41 PM	10 of 10	
Example Scoresheet B	Investment 10	Example Scoresheet B	eCPIC, End User	12/4/2008 3:40 PM	0 of 10	
Example Scoresheet C	Investment 20	Example Scoresheet C	eCPIC, End User	12/4/2008 3:54 PM	0 of 10	

3. Click on the **Scoresheet Name** that will be deleted.
4. From within the Investment Scorecard Field screen, click on the **Delete Scoresheet** icon ().
5. Confirm deletion of the Scoresheet. Click **OK**.



Note: Scoresheets can also be deleted through the Edit Scoresheet screen by clicking on the Delete Scoresheet icon ().

7.9 Assign User/Group Permissions

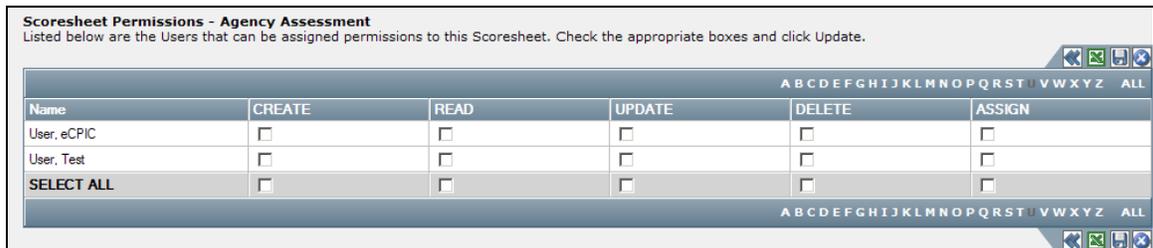
If users possess the ‘Assign Permissions’ RIGHT to the Scoring module or ‘Assign Permissions’ PERMISSIONS to a specific Scoresheet, they will see the **User**  and **Group Permissions**  icons in the Scoring toolbar. These icons are used to launch the forms that allow users to grant access to the Scoresheet.

Note: When users create a new Scoresheet, they are automatically granted full permissions to it, including the Assign permission.

7.9.1.1.1 Assign User Permissions

To Assign User Permissions for a Scoresheet:

1. From within the Scoresheet that ‘Assign Permissions’ will be added, click on the **User Permissions** icon (). The Scoresheet Permissions screen will appear:



Name	CREATE	READ	UPDATE	DELETE	ASSIGN
User, eCPIC	<input type="checkbox"/>				
User, Test	<input type="checkbox"/>				
SELECT ALL	<input type="checkbox"/>				

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

Note: In order for a user to create a new Scoresheet, they have to obtain ‘Create’ RIGHTS from the System Administrator.

2. **Check** the boxes that correspond to the level of access to be granted. If the intent is to deny access to a user that is currently able to access the Scoresheet, then **Uncheck** the box. Can also check the **Select All** checkbox to select all the users on the current page at once.
3. Click **Update** to save changes before changing screens (*or moving to the next page of users*).

7.9.1.1.2 Assign Group Permissions

To Assign Group Permissions for a Scoresheet:

1. From within the Scoresheet that users wish to ‘Assign Permissions’ will be added, click on the **Group Permissions** icon (👤). The Scoresheet permissions screen will appear:

Name	CREATE	READ	UPDATE	DELETE	ASSIGN
Test Group	<input type="checkbox"/>				
SELECT ALL	<input type="checkbox"/>				

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

Note: In order for a user to create a new Scoresheet, they have to obtain ‘Create’ RIGHTS from the System Administrator.

2. **Check** the boxes that correspond to the level of access that will be granted. If the intent is to deny access to a group that is currently able to access the Scoresheet, then **Uncheck** the box. You can also check the **Select All** checkbox to select all the groups on the current page at once.
3. Click **Update** to save changes before changing screens (*or moving to the next page of groups*).

7.10 Scoresheet Revisions

When making revisions to investments, users have the ability to copy over Scoresheets to the new revision. If users **Check** “*Copy over scoresheets to the new revision*”, then the previous Scoresheet will be copied over and will be listed in the Scoring module under the Scoresheets link. Users will be able to see the previous scoring rates and edit them to reflect any changes needed for the revised investment. System Administrators will also be able to set a new Authoritative Record or choose the previous Authoritative Record, by comparing the final score from the previous investment and the new score made from any edits or any new Scoresheets created for the revised investment. This will allow for a new Authoritative record to be set since no set Authoritative Record will be copied over. However, System Administrators will have the ability to ‘view’ the previous Scoresheets Authoritative Record.

If users **Uncheck** “*Copy over scoresheets to the new revision*”, then there will be no Scoresheets listed for this investment in the Scoring module under the Scoresheets link. In order for the System Administrator to set a new Authoritative Record, new Scoresheets will have to be created and assessed. After new Scoresheets have been assessed, then the System Administrator will be able to ‘view’ the previous scores.

However, previous Scoresheets will not be available to set as a new Authoritative Record.

7.11 View Scorecard Fields

To View a Scorecard that has been created in the system:

1. Click on the **Scoring** module.
2. Click on the **Scorecard Name** for the fields that will be viewed. The Scoresheets screen will appear:

Field Name	R-Y Boundary	Y-G Boundary	Weight	Percentage
Exhibit 300 Scoring: Acquisition Strategy	3	4	1	0.1
Exhibit 300 Scoring: Alternatives Analysis	3	4	1	0.1
Exhibit 300 Scoring: Enterprise Architecture	3	4	1	0.1
Exhibit 300 Scoring: Life Cycle Costs Formulation	3	4	1	0.1
Exhibit 300 Scoring: Performance Based Management System	3	4	1	0.1
Exhibit 300 Scoring: Performance Goals	3	4	1	0.1
Exhibit 300 Scoring: Program Management	3	4	1	0.1
Exhibit 300 Scoring: Risk Management	3	4	1	0.1
Exhibit 300 Scoring: Security and Privacy	3	4	1	0.1
Exhibit 300 Scoring: Supports the President's Management Agenda Items	3	4	1	0.1
			10	100

3. Click on the **Scorecard Fields** tab.

The Percentage column represents each field’s impact percentage based upon the weights assigned by the System Administrator. Percentage values for child fields represent the percentage of the total score of the parent field. The weight of a field represents the impact of the fields score on the total score of either the Scorecard or parent field.

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