

## 4. INVESTMENTS

The Investments module is used for creating and managing all investment information. In the Investments module, users can create new investments, make revisions and continually manage data throughout an investments life cycle.

### 4.1 Overview

Each investment is associated with a Template. The Template contains the default Processes which reflects all the required fields for OMB. These fields are separated by Sections and Sub-Sections within the Process.

All fields associated with the Exhibit 300 and the Exhibit 53 are answered and edited within the Investments module. However, eCPIC allows System Administrators to create Agency-defined fields that can be included in the default processes or an Agency-defined process. When submitting to OMB, only the *OMB defined* fields export to XML 300 for submission to OMB.

For more information on OMB required fields, see the *A-11 Guidance* or log on to [www.egov.gov](http://www.egov.gov).

### 4.2 Creating New Investments

The following are instruction to create a new investment:

1. Click on the **Investments** module to access the Standard View.
2. Click the **New Investment** icon (  ). The Investment Definition form will appear:



The screenshot shows a web form for creating a new investment. At the top, it displays the breadcrumb: "Investment: [New Investment]". Below this, the process details are shown: "Process: Exhibit 300 BY10", "Section: Initiative Definition BY10", and "Subsection: Initiative Definition BY10". The form fields are as follows:

- Template Name:** A dropdown menu with "BY2010" selected.
- Is this investment a consolidated business case?:** A radio button interface with "Yes" and "No" options, where "No" is selected.
- Investment Name:** A text input field with a character count of "250 characters remaining".
- Point of Contact:** A text input field with a dropdown arrow and a button labeled "Add new contact".
- Revision Comment:** A text area with a lock icon.
- Class:** A dropdown menu with "non-IT" and "IT" options, where "IT" is selected.

3. When creating a new investment, users have the option of associating the investment with any of the templates that are available. Select the **Template Name** the new investment will be associated with.

Investment: [New Investment] Process: Exhibit 300 BY10 Section: Initiative Definition BY10 Subsection: Initiative Definition BY10

Template Name

Is this investment a consolidated business case?

Investment Name

Point of Contact

Revision Comment

Class

4. Select whether the new investment will be a **consolidated business case**. If ‘Yes’ is selected, users will have the ability to create sub-investments for the new 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.**

5. Enter the **Investment Name**.
6. Enter the **Point of Contact (POC)**. 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.

Point of Contact

First Name  (required)

Middle Initial

Last Name  (required)

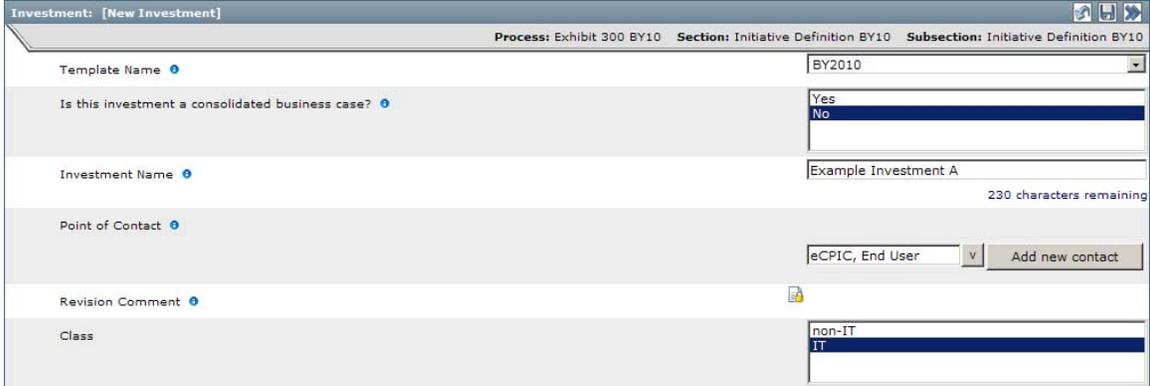
Email  (required)

Phone number  (required)

**Note: The Revision Comment is entered when revising an investment. Once a revision has been made, the older copy is then locked down and will only be available in a ‘view’ mode. The revision comment will appear with the older version of the investment in ‘view’ mode.**

7. Enter in the **Class**. This will specify if the investment is for Information Technology or not.

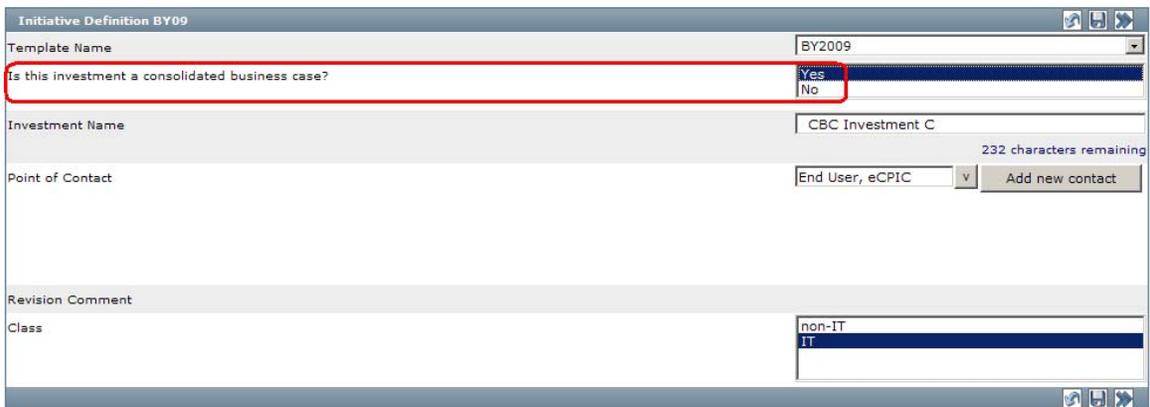
- Click on the **Next** arrow  to save information to the database and proceed to the next section of fields. The user can also choose to just **Save**  the information without moving forward or **Undo**  to remove all data entered.



### 4.3 Creating a Consolidated Business Case

Any user with ‘Create’ RIGHTS to the Investments module will be able to create a consolidated business case (*i.e., umbrella investment or parent investment*). Unless users are a System Administrator, they will have to create a new investment in order to create a consolidated business case. They will not be able to change an unconsolidated investment to a consolidated investment.

- Click on the **New Investment** icon  to create a new investment (*this investment will be considered the parent or umbrella investment*).
- Select the **Template Name** in which the investment will be created.
- Select **Yes** from the ‘Is this investment a consolidated business case?’.



- Fill in the rest of the Investment Definition form.