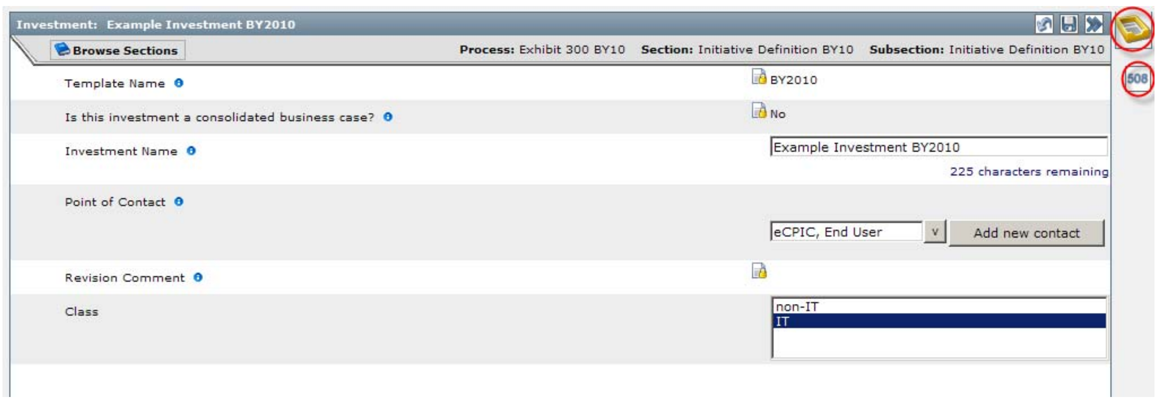
4.14 Investment Resources

eCPIC provides a **Resource Library** that allows users to access and download reference materials from anywhere in the application, including the Home Page. Users can add a resource to the Resource Library, make it **Public** or **Private**, and link it to Resource Categories or Investments.

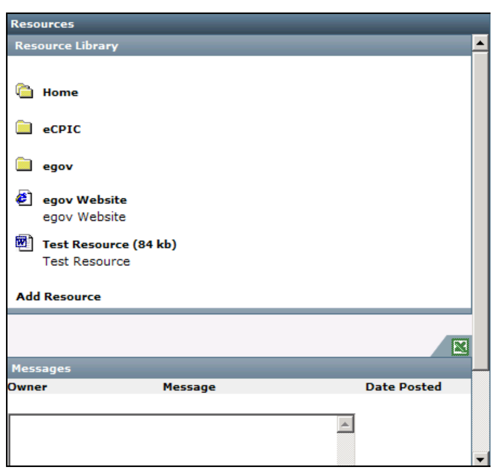
4.14.1 Accessing Investment Resources

To Access Investment Resources from within an investment:

1. Click on the **Toggle Resource List** icon ( ). The Resource List icon will appear on the side of the investment. There will also be the ( ) icon.

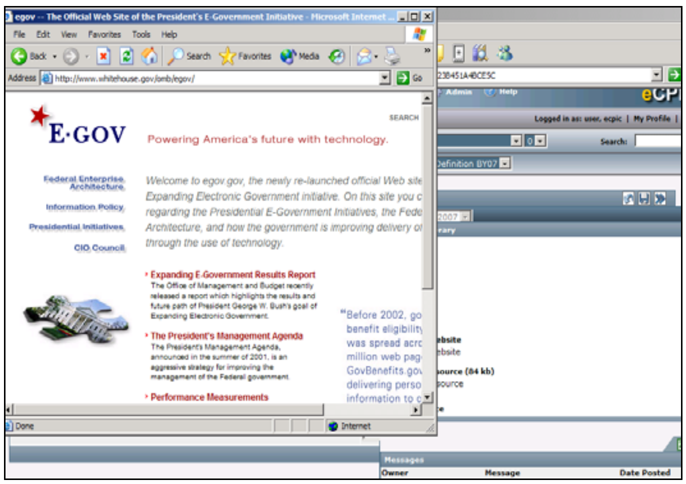


2. Mouse over either icon to show the **Resource Library** and investment **Messages**. The **Resource Library** window contains a list of Resources that relate specifically to the investment.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window they can release the click from the icon. *Click on the icon or outside the box to close the pop-up window.* If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position. *Click on the 508 icon again to close the window.* This will show both the Resource Library and 508 icons once again.

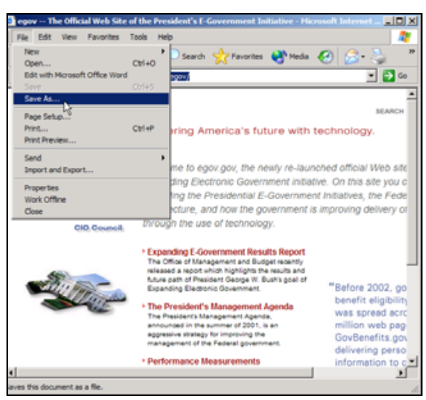
3. Click on a **Resource Title** to open the resource in a separate browser window. The browser window can be resized and kept open as users continue to review or edit the investment data.



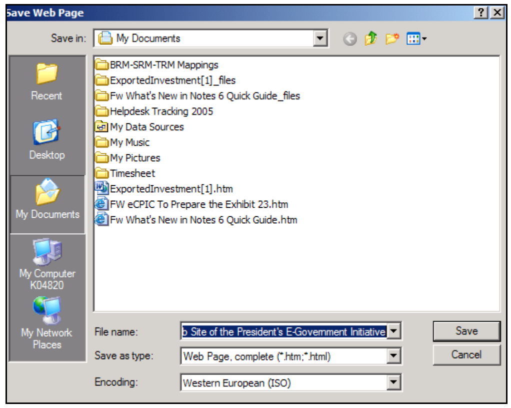
4. From the address bar in the new window, highlight the **Name** of the file.

5. Click on **File**.

6. Select **Save As**.



<u>A File download or Save Web Page screen will appear:</u>



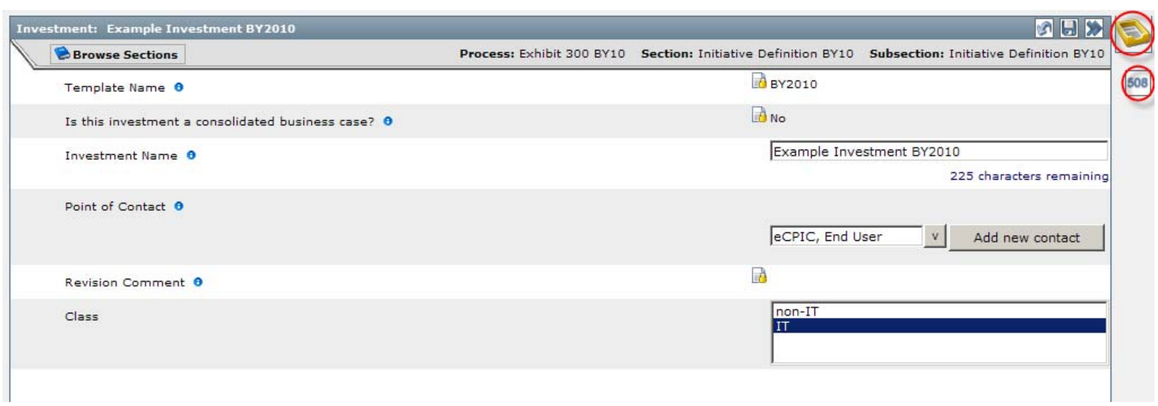
7. Select the location that to save the file and name the file.

8. Click **Save** to save the document.

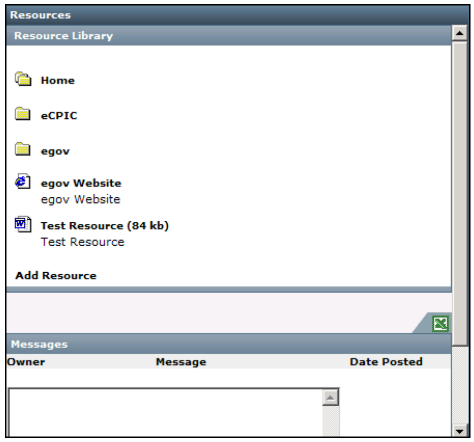
4.14.2 Adding Investment Resource

If users have 'Create' RIGHTS for the Resource Library, they will be able to add Resources to the Investment Resource Library.

1. From within the investment, for which a resource will be added, click on the **Toggle Resource List** icon ( ). The Resource List icon will appear on the side of the investment. There will also be an 508 icon.

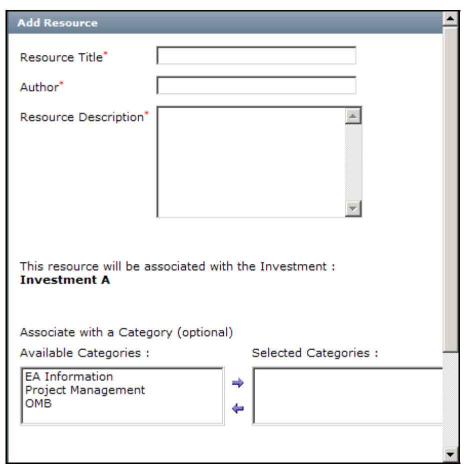


2. Place the mouse over the Resource Library icon to show the **Resource Library** and investment **Messages**. The **Resource Library** window contains a list of Resources that relate specifically to the investment.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. ***Click on the icon or outside the box to close the pop-up window.*** **If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position.** ***Click on the 508 icon again to close the window.*** **This will show both the Resource Library and 508 icons once again.**

3. In the Resource Library window, click **Add Resource**. The Add Resource form will appear:



4. In the **Add Resource** form, enter the Title, Author, and Description.

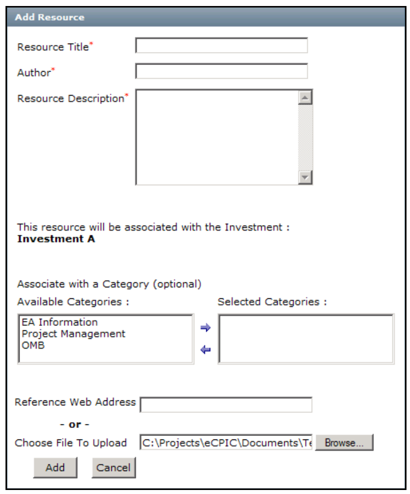
5. If there are Resources Categories available, users will see them listed in the ‘Available Category’ box. They can associate the Resource with a category by highlighting the specific category and clicking the ➡ arrow to move it to the ‘Selected Category’ box.

To remove a category from the ‘Selected Category’, highlight the category and click on the arrow to move it back in the ‘Available Category’ box.

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

6. If adding a Web link, enter the address in the ‘Reference Web Address’ field. (*Don’t forget to add the http:// to the beginning of the link*).

7. If adding a document, click **Browse** and navigate to find the appropriate file.



8. After all information is complete, click **Add**.

The Resource will now be associated with the investment and any Category specified.

4.15 Investment Resource Messages

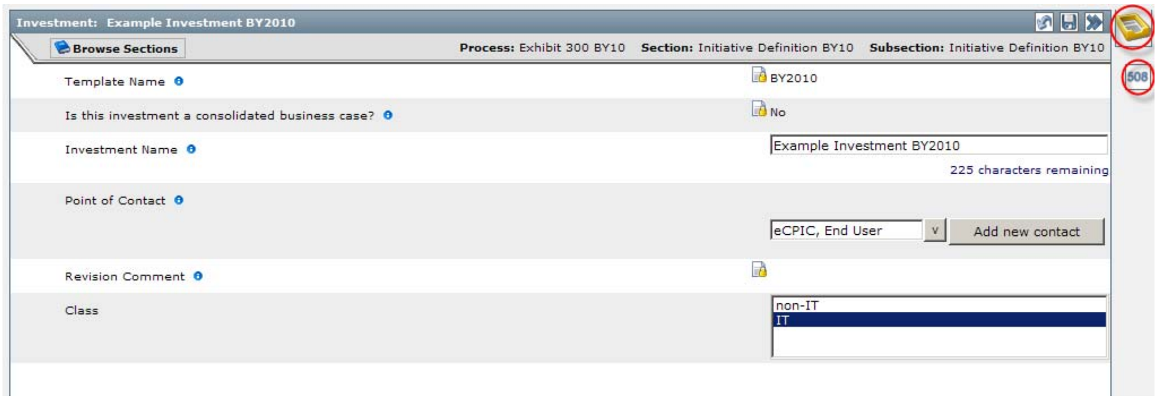
Within any investment (*assuming the user has access to the Resource Library*), they also have the ability to post and delete messages through the **Toggle Resource List** icon (). The messages are investment specific and will be viewable to all users that have access to the respective investment **Resource Library**. The intent of messaging is to allow correspondence about an investment to be centralized inside of eCPIC.

4.15.1 Creating a Resource Message

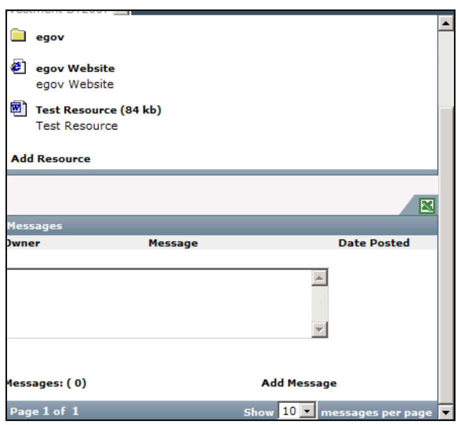
To Create a Resource Message:

1. From the Investments module, click on the **Investment Name** for which a message will be added.

2. Once inside the investment, click on the **Toggle Resource List** icon (). The Resource List icon will appear on the side of the investment. There will also be an  icon.



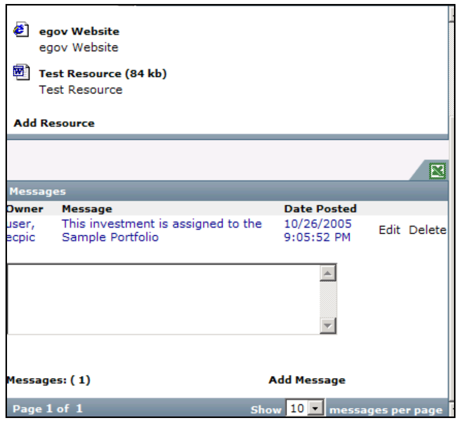
3. Move the mouse over the Resource Library icon to view the **Resource Library** and an investment **Messages** field.



Note: Once users click on the Toggle Resource, they can click on the top bar of the Resource Library window and drag it where they would like. Once users have dragged the window where they would like it, they release the click from the icon. ***Click on the icon or outside the box to close the pop-up window.*** **If users click on the 508 icon, they will not be able to drag the window. Instead, the Resource Library will appear to the right in a locked position.** ***Click on the 508 icon again to close the window.*** **This will show both the Resource Library and 508 icons once again.**

4. Within the **Messages** field, type in the message that will appear with the investment. *Be advised there is a 500 character limit*.

5. Click **Add Message**.



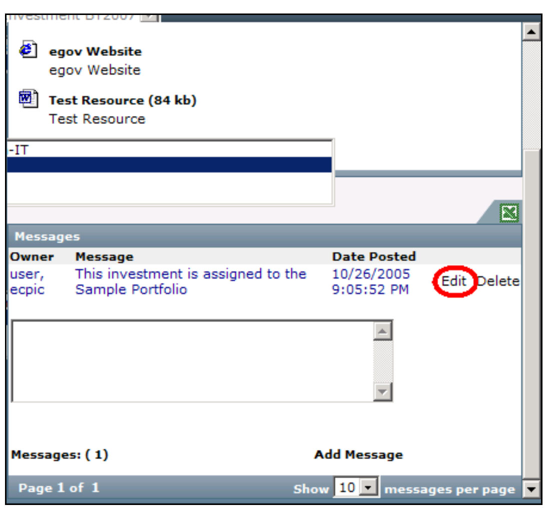
The Owner of the message, the Date and Time the message was posted, and the actual message will appear. The number of messages associated with the investment will also appear.

When other users click on the **Toggle Resource List** icon ( ), they will be able to view all messages associated with the specific investment.

4.15.2 Editing a Resource Message

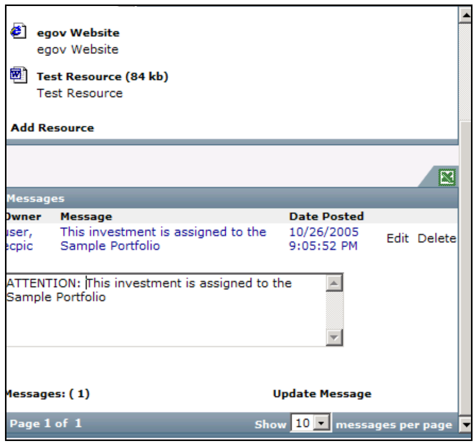
Only the System Administrator and the Owner of a message have the ability to **Edit** a message.

1. From the **Message** Field, click the **Edit** link next to the message that is to be edited.



2. Make appropriate changes.

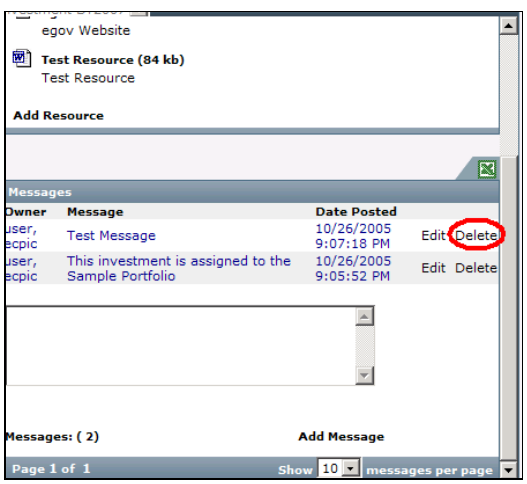
3. Click **Update Message**. The message will be updated with changes.



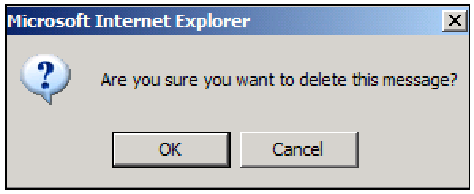
4.15.3 Deleting a Resource Message

Only the System Administrator and the Owner of a message have the ability to **Delete** a message.

1. From the **Message** Field, click the **Delete** link next to the message that is to be deleted.



2. Confirm that the message should be deleted. Select **OK**.



The window will refresh and the message will be deleted.

4.16 Inline Scoring

Within the Investments module, users with scoring privileges will be able to score their investments in a streamlined fashion. This provides the ability to view the investment fields while scoring. In order to activate the scoring pane, users can click the **Toggle Scoring Pane** icon ( ).

Similar to the investment workflow, users will then be able to input scoring data while navigating through the processes, sections, and sub-sections. When a user is in a particular Process, Section and Sub-Section in the Investment Workflow, they will be able to toggle the Scoring icon for the different Scoresheets and grade the fields that have been created relating to that area. This allows for easy navigation between different Scoresheets based upon user and group access.

Note: A scorer will have to be familiar with the fields in the Scorecard Workflow that relate to each Section and/or Subsection of a Process.

1. Click on the **Investment** module.

2. Click on the **Investment Name** that is to be scored.

3. From within the investment, click on the **Toggle Scoring Pane** icon ( ). The Toggle Scoring pane icon will appear on the side of the investment. There will also be an 508 icon.