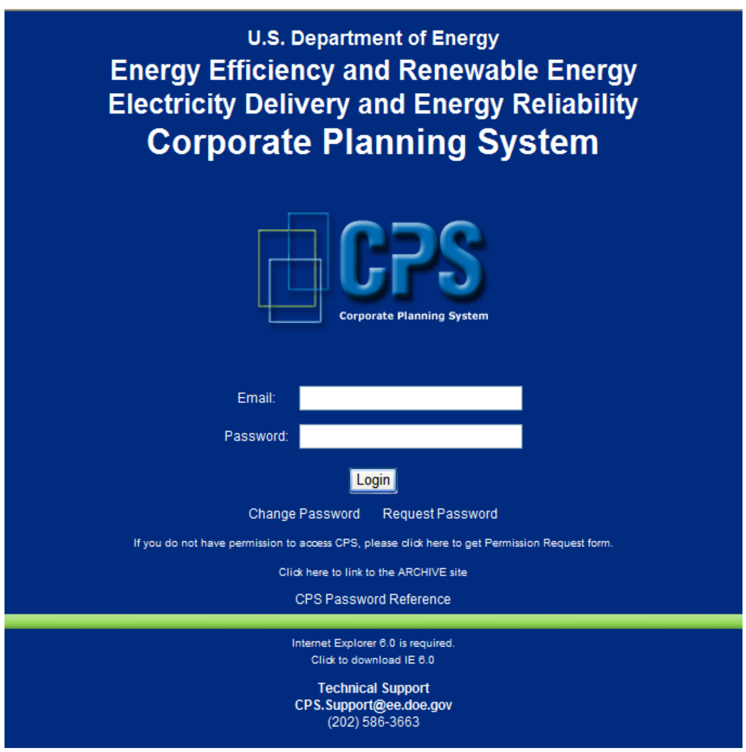
Welcome To CPS

Strategic Planning System for the

United States Department of Energy,

Office of Energy Efficiency and Renewable Energy

Office of Electricity Delivery and Energy Reliability



CPS New User Packet

Welcome New User,

The Corporate Planning System (CPS) is a web-enabled comprehensive strategic planning system. As a CPS user, you have the ability to monitor budgeting data and contract details essential to the funding process used by the United States Department of Energy's (DOE) Office of Energy Efficiency and Renewable Energy (EERE) and the Office of Electricity Delivery and Energy Reliability (OE). CPS provides a central location for technical and financial information. To log onto CPS while on the DOE network use https://cps.ee.doe.gov/cpsweb. To log onto CPS while off the DOE network use https://cpsweb.ee.doe.gov/cpsweb.

The CPS Support Team encourages new users to enroll in a live training environment to fully understand CPS's capabilities. To sign up for the next training session, please go to http://eere-intranet.ee.doe.gov/eere/eistraining/.

We have compiled this guide describing how to use common CPS functions within the system. The CPS Support Team also recommends new users sign up for EIS training; this tool can provide enhanced reporting capabilities for CPS data. Users can register for EIS training at http://eere-intranet.ee.doe.gov/eere/eistraining/.

For further in-depth instructions on using CPS, please refer to the "CPS Desktop Reference" located on the CPS Home page.

The CPS Support Team is actively enhancing the CPS user guides and other helpful resources to provide comprehensive user tools. We will be rolling out further training guides, help videos, and live training sessions so stay tuned.

Sincerely,

CPS Support

cps.support@ee.doe.gov

(202) 586-3663

Password Rules

- Make sure the password contains at least eight characters.
- Combine letters, numbers, and at least one special character within the first seven positions.
- Must contain a nonnumeric in the first and last position.

Examples

- !cps 4all
- CPS!r~~o~~cks
- my1#cps$
- cps&Solar2

To ensure website security, three unsuccessful attempts to log into CPS will result in your account being locked. If this happens, contact the CPS Support Team at (292) 586-3663 or online at CPS.Support@ee.doe.gov, so that we may assist you in getting the user account unlocked.

CPS System Requirements:

- Internet Explorer 6.0 or higher

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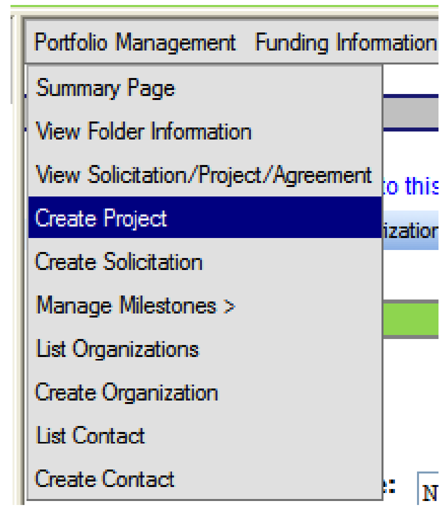
Creating a Project

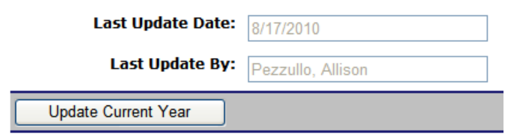
A Project is a grouping of work (Agreements) used to facilitate an organizational structure within CPS. In CPS, work can be grouped into Projects according to the Program work breakdown structure, technical content, Solicitation topics, and by AFP recipient. Projects exist in each Program folder and appear as gray icons.

To create a new Project, complete the steps below.

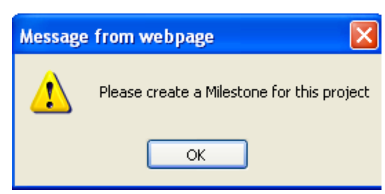
1. Determine which subprogram or key activity folder the new Project will be located under. Select that folder.
2. Once the correct folder has been selected, go to Portfolio Management in the toolbar and select > Create Project from the dropdown menu.



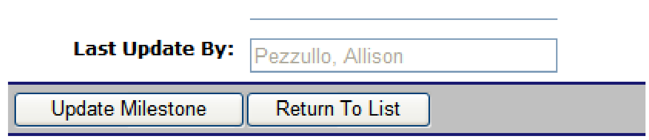
3. Enter quality information about the new Project into the corresponding fields.
4. When entering information, red asterisks denote a required field. The required fields are
   a. The formal title includes the entire heading of the Project.
   b. The short title is a CPS identifier for the navigation window that can be used as a way to identify the annual operating plan.
   c. The description field houses quality information for identifying what type of work (Agreements) will be organized under the Project.
   d. Project type refers to the direction of the work to be completed under that Project.
   e. Project status will default to Active.
   f. The technology manager refers to the HQ point of contact who oversees the progress of that Project.
   g. The budget analyst will default to the BA staff member assigned to oversee the funding and budget for that subprogram or key activity folder.
   h. The start date will default to the day the Project is created.
   i. The completion date will default to the last day of the current fiscal year, but the Project duration can expand over multiple fiscal years.
5. Once all of the required fields are entered, select > Update Current Year.



6. At this time the system will automatically prompt you to create a Milestone.
7. If a Milestone has been set for the new Project, click > OK on the prompt window. If a Milestone has not been set, exit out of the window and wait until a milestone has been formulated.



8. Refer to the Milestone Reference to learn how to create, edit, and update milestones.
9. Enter the information indicated by each starred field for the Milestone.
10. Once all the fields are entered, select > Update Milestone.

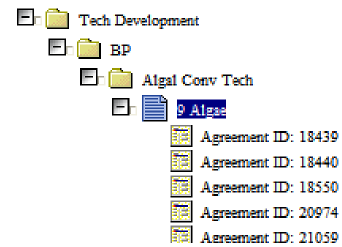


More information can be found on page 23 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

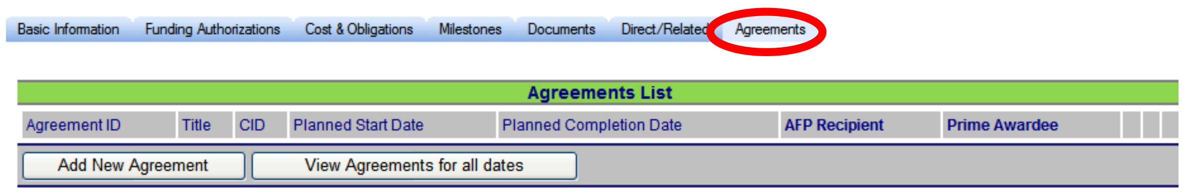
Creating an Agreement

Agreements are individual pieces of work being performed in the field or at headquarters. Agreements can only be created and grouped under Projects. In CPS, Agreements are identified as yellow icons.

To create a new Agreement, complete the steps below.



1. Determine which Project the Agreement will fall under in CPS. Select the correct Project from the navigational window.
2. Select > Agreements from the Project page navigation tabs.
3. Once on the Agreements List page, select > Add New Agreement.
4. Enter quality information for the new Agreement into the corresponding fields.



5.
6. When creating a new Agreement the red asterisks denote a required field. The required fields are
    a. The <u>formal title</u> includes the entire heading of the Agreement.
    b. The <u>short title</u> is a CPS identifier for the navigation window that can be used as a way to identify the annual operating plan.
    c. The <u>description</u> field houses quality information for identifying the work that has been contracted.
    d. The <u>technology manager</u> refers to the HQ point of contact who oversees the progress of that Agreement.
    e. The <u>AFP Recipient</u> refers to the entity to which the funding will be authorized.
    f. The <u>Prime Awardee</u> may be different from AFP Recipient, and refers to the entity that will be performing the work.

g. The award type categorizes what kind of work the Agreement requires.

Award Description

Name	Description
Contract	A mutually binding legal relationship that obligates the seller to furnish specified supplies and/or services and the buyer to pay for them. This award type includes task orders, delivery orders, no-cost extensions, cost extensions, contract modifications and any other transaction performed under an existing contract.
Contract - M&O Lab Direct	A managing and operating contract in which the intellectual leadership and the necessary personnel and expertise required to manage and operate the Laboratory are provided.
Contract - M&O Lab Subcontract	An award to any supplier, distributor, vendor, or firm that furnishes supplies or services to or for a managing and operating contract.
Cooperative Agreement	A type of federal assistance; essentially, a variation of a discretionary grant, which is awarded by the Department when it anticipates having substantial involvement with the grantee during the performance of a funded project.
Cooperative Agreement - CRADA	A Cooperative Research and Development Agreement, a legal contract that allows one or more federal laboratories and/or one or more nonfederal entities to enter into an agreement to jointly conduct specified research- and development-related technology transfer activities that are consistent with the mission of the laboratory.
Grant - Discretionary	An award of financial assistance in the form of money, or property in lieu of money, to an eligible grantee, usually made on the basis of a competitive review process.
Grant - Formula	A grant directed by Congress to make to grantees, for which the amount is established by a formula based on certain criteria that are written into the legislation and program regulations; directly awarded and administered in the Department's program offices.
Grant - SBIR/STTR	An award made for either Small Business and Innovative Research or Small Business Technology Transfer.
HR Actions	Funding for employee performance awards, professional liability insurance reimbursement, and other human resources related transactions.
Purchase	The purchase of supplies, equipment, materials, etc outside of a formal contractual agreement. Usually it is a transaction that follows simplified acquisition or micro-purchase procedures.

Close

h. If the Agreement is for a lab, either the AOP Number or FWP Number is required.

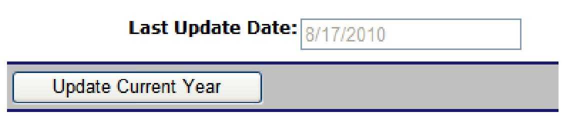
i. The status defaults to Active when a new Agreement is created.

j. The CID Number represents the entity that will be performing the work. The CID auto-populates for lab Agreements.

k. The planned start date will default to the date the Agreement is created.

l. The planned completion date will default to the end of current fiscal year, but the Agreement duration can expand over multiple fiscal years.

7. Once all the fields are entered, select > Update Current Year.



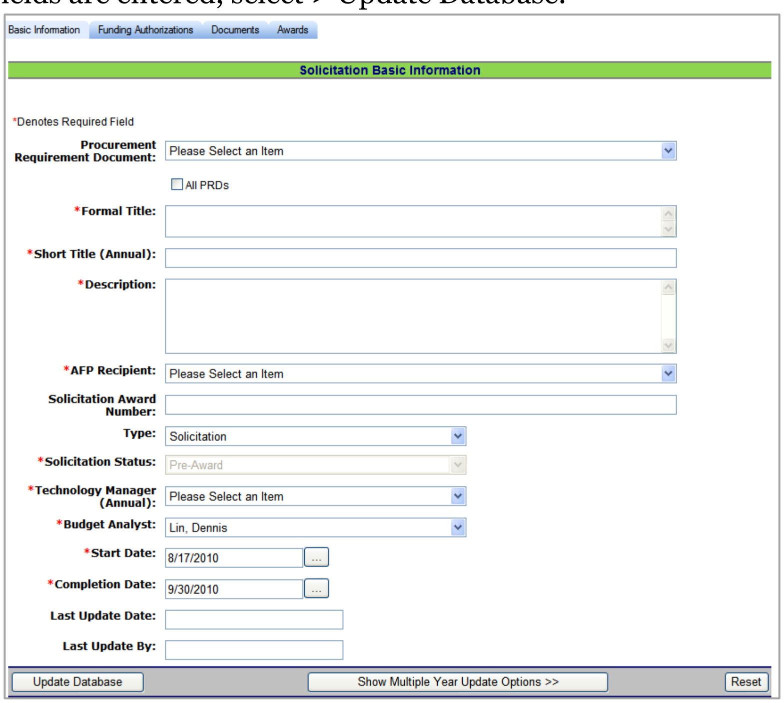
More information can be found on page 33 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

Creating a Solicitation

Solicitations are vehicles to send money to the field to initiate the competitive process from which awards are made. Resulting awards will become Agreements in CPS. Solicitations can be found in the CPS folder navigation menu, near the Projects Tab. In CPS, Solicitations appear as green icons.

To create a new Solicitation, complete the steps below.

1. Determine which subprogram or key activity folder the new Solicitation will be located under. Select > Create Solicitation from the Portfolio Management menu.
2. Enter quality information for the new Solicitation into the corresponding fields.
3. When completing a new Solicitation, red asterisks denote a required field. The required fields are
    a. The formal title includes the entire heading of the Solicitation.
    b. The short title is a CPS identifier for the navigation window that can be used as a way to identify the annual operating plan.
    c. The description field houses quality information for identifying the type of work the Solicitation is to award with a contract.
    d. The AFP Recipient refers to the entity to which the funding will be authorized.
    e. Solicitation Status will default to pre-award until contracts have been granted.
    f. The technology manager refers to the HQ point of contact who oversees the progress of that Solicitation.
    g. The budget analyst will default to the BA staff member assigned to oversee the funding and budget for that subprogram or key activity folder.
    h. The start date will default to the date Solicitation is created.
    i. The completion date will default to the end of the current fiscal year, but the Solicitation duration can expand over multiple fiscal years.
4. Once all the fields are entered, select > Update Database.



More information can be found on page 18 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

Search Options

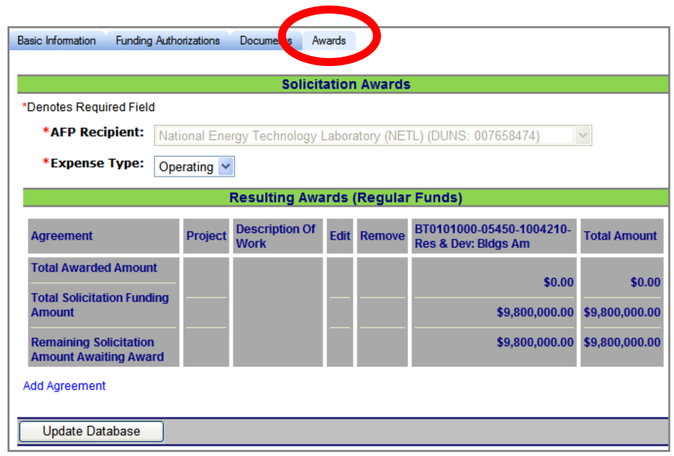
The first step for any search is to choose a fiscal year. Currently, our search engine will only run the search feature within the selected fiscal year. After the fiscal year is determined, entering the document's title, identification number, and various other key elements, can help a user find any document successfully. Further developments are on their way for enhancing this feature.

Awarding a Solicitation

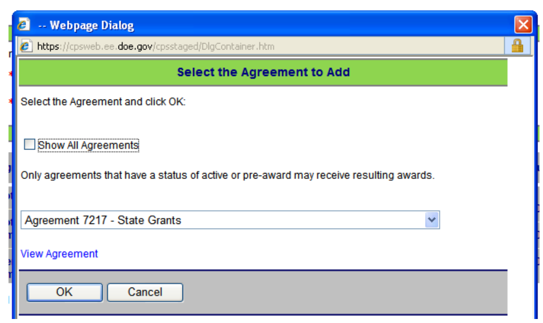
Solicitations are vehicles to send money to the field to initiate the competitive process from which awards are made. Resulting awards will become Agreements in CPS. Solicitations can be found in the CPS folder navigation menu and will appear as green icons in the CPS folder structure.

To award funding from a Solicitation, complete the steps below.

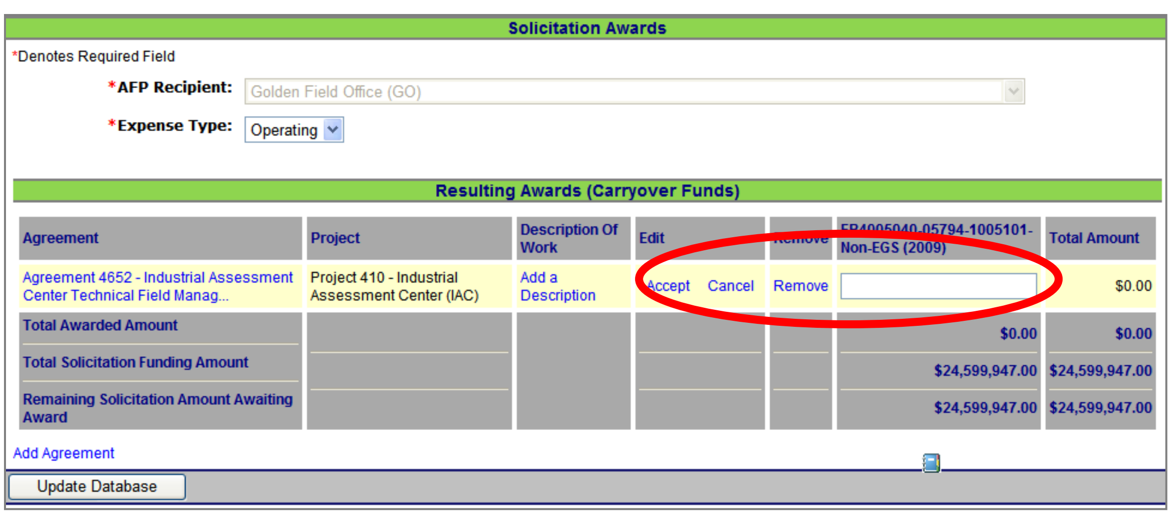
1. Determine the Solicitation to be awarded to the field and select > Edit Page.
2. Determine the Agreement(s) to receive funding through the Solicitation.
3. Once on the Solicitation page, select >Awards from the top navigation.
4. Choose your Expense Type (Operating or Capital Equipment) and select > Add Agreement.



5. Select the Agreement(s) to add in the pop-up window.



6. Enter the amount awarded to the Agreement.



7. When all funding has been awarded to the Agreements, the Remaining Solicitation Amount Awaiting Award should total zero.
8. Once the award amounts have been added to the Agreement, select > Update Database.
9. When viewing the Agreement,this new solicitation funding will appear as a Solicitation Award.

Authorized Program Guidance								
Funding Action Number	FY	Amount	Funding Source	Type	AFP Recipient	Month	Funding Action Type	Expense Type
	2010	$200,000.00	ED1907042-05450-1004397-Best Practices/SEN	R	GO	Aug	Solicitation Award	Operating
AFT: 399	2010	$100,000.00	ED1907010-05450-1004393-IAC	R	GO	Dec	Agreement Fund Transfer	Operating
Total		$300,000.00						

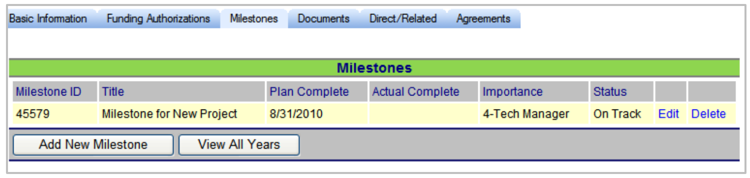
More information can be found on page 16 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

Creating a Milestone

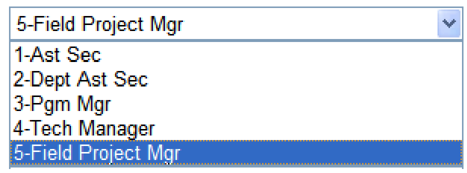
Milestones are used to track the progress of key Program activities in CPS. The quality of information for each milestone is highly important. Milestones are associated with both Projects and Agreements in CPS. For the Office of EERE, a current year milestone is required in order for any Project or Agreement to be funded.

To create a new Milestone, complete the steps below.

1. Determine the Project or Agreement that the milestone will be created for in CPS. Select the desired Project or Agreement from the navigational window.
2. Once on the correct Project or Agreement page, select > Milestones from the navigational tabs at the top of the page. Click > Add New Milestone.



3. Enter quality information about the new Milestone into the corresponding fields.
4. When creating a new milestone the red asterisks denote a required field. The required fields are
    a. The Title for a Milestone will include the entire description of the Milestone.
    b. The HQ Lead refers to the federal point of contact for the Project or Agreement to which the Milestone is attached.
    c. The Importance field indicates what level will be in charge of managing the progress of the Milestone.



    d. Milestone Type

Final Deliverable*	Related to completion of all Project deliverables within a Project.
Go/No Go Decision	Decisions to continue Projects based upon peer review or Program assessments made by the HQ Program manager.
Intermediate Deliverable*	Linked to funding in a "level of effort" environment. These milestones are linked to funds associated to the level where work is performed and identify stepping stones to the final deliverable (i.e. Submit quarterly report identifying key offshore environment and siting barriers…).
Process Milestone	• Major activities of the Solicitation and award of grants. • Significant accomplishments that overcome barriers or obstacles, including major cost drivers, NEPA inspections, subcontract awards, etc. • Milestones associated with Project related peer review activities.

*Both Intermediate and Final Deliverable milestones should have funding associated with their activities.

    a. The Status and Status Text will default to "On Track."
    b. The Planned Completion Date must be prior to the completion date of the Project or Agreement.

5. Once all the fields are entered, select > Update Milestone.

More information can be found on page 21 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

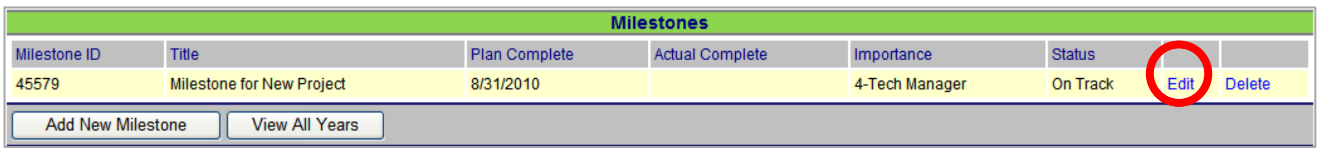
Updating a Milestone

Milestones periodically need to be updated in CPS to leave status notes regarding the Milestone progress, when the Milestone is complete, or when the points of contact have changed.

To update a Milestone, complete the steps below.

1. Determine the Project or Agreement where the Milestone is located in CPS. Select the correct Project or Agreement from the navigational window.
2. Once on the Project or Agreement page, select > Milestone from the page's top navigation tabs.

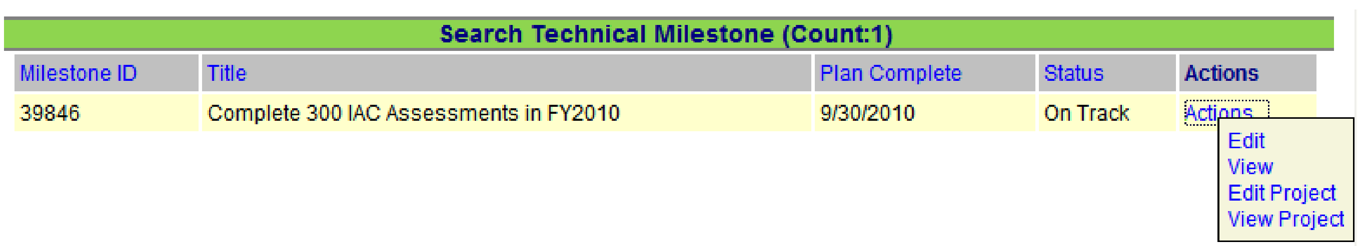
3. Once the CPS page has refreshed, locate the Milestone to update and then click > Edit.



4. Make any necessary edits.
5. When reviewing the milestone information take note of the Milestone status.
   a. Status- Prior to the plan completion date, the Milestone manager will receive an e-mail indicating the upcoming deadline. Another e-mail will be generated to indicate the new status of the Milestone as the status changes.
      i. On Track: If the planned completion date has not passed.
      ii. In Process: For an upcoming Milestone.
      iii. Behind: If the planned completion date is less than 90 days overdue.

      iv. Critical: If the planned completion date is 90 days overdue or more.
      v. Complete: If the actual completion date has been entered.
6. Once all the fields are entered, select > Update Milestone to save changes.

A search option is available for locating Milestones in CPS. Using the Milestone identification number (Milestone ID) or the point of contact for the Milestone, CPS users can go to "Search Technical Milestones" to view and edit the Milestone.



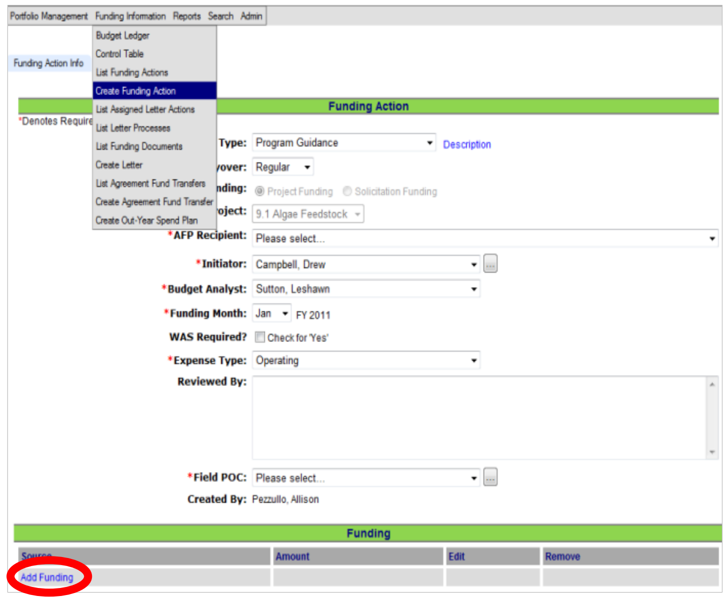
More information can be found on page 21 & 37 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

Creating a Funding Action

Funding actions provide instructions on how to use funding for a particular piece of work. Funding actions are written at the Project level in CPS but are planned to the Agreement level. For EERE, funding actions are compiled for electronic concurrence and processing on the 25th of every month. For OE, funding actions are due on the 10th of every month. Each office has their own timeline for when funds receive final approval and are distributed to the field.

To create a Funding Action, complete the steps below.

1. Determine the Project, Agreement, or Solicitation to be funded. Select the icon in the navigation window.

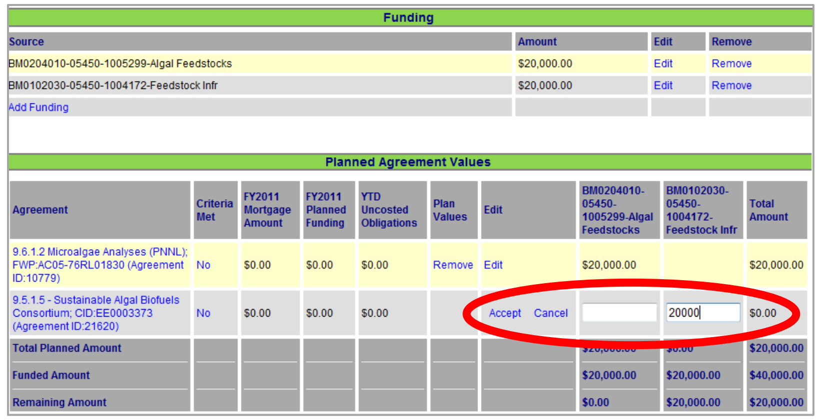


2. Go to the Funding Information menu and select > Create Funding Action.
3. Enter quality information into the corresponding fields. When creating a new funding action, the red asterisks denote a required field.
   a. At the top of the funding action page choose the Funding Action Type from the drop down menu.
      i. A <u>Program Guidance</u> authorizes general use funds to a PMC or National Lab.
      ii. A <u>2-Stage Program Guidance (non-HQ)</u> is used when funds are being used from outside the authority of the manager responsible for the activity. Funds are being used from different B&R code(s).
      iii. <u>Redirection</u> funding actions move funds between two Agreements under a different Project, but the AFP recipient and the B&R Code must be the same.
      iv. <u>HQ Funding Action</u> for funding being authorized towards headquarters Agreements. See 'Creating a HQ Funding Action' for more details on this funding action type.
   b. Determine whether the funding action is to use <u>Regular</u> funds (current fiscal year) or <u>Carryover</u> funds (previous fiscal years).
   c. The <u>funding month</u> will default to the earliest month to distribute funding. A later month can be chosen if preferred and the funding action will be processed at that time.
   d. From the drop down menu choose the <u>Field POC</u> who is the site office or PMC contact to verify that the funding information has been sent.
   e. From this section, choose > Add Funding.
   f. A drop down box will appear to select the B&R Code(s) that will fund the Agreement(s).

4. Under the Planned Agreement Values heading there are two ways to add funding values.

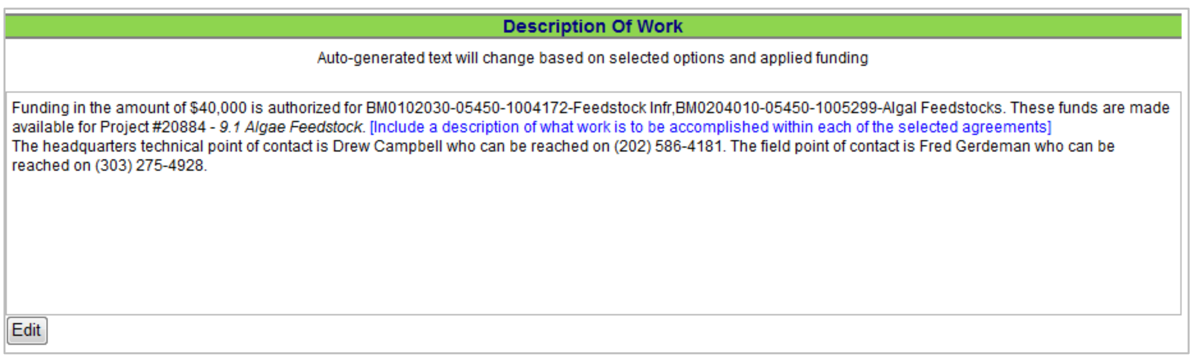
   a. If the funding action was written at the Agreement level, Plan Values will automatically post.

   b. If the funding action was written at the Project level then the funds will need to be detailed to the Agreement level. Under Planned Agreement Values > Click the Plan Values hypertext > Enter the amount from each B&R Code to each Agreement > Click Accept.

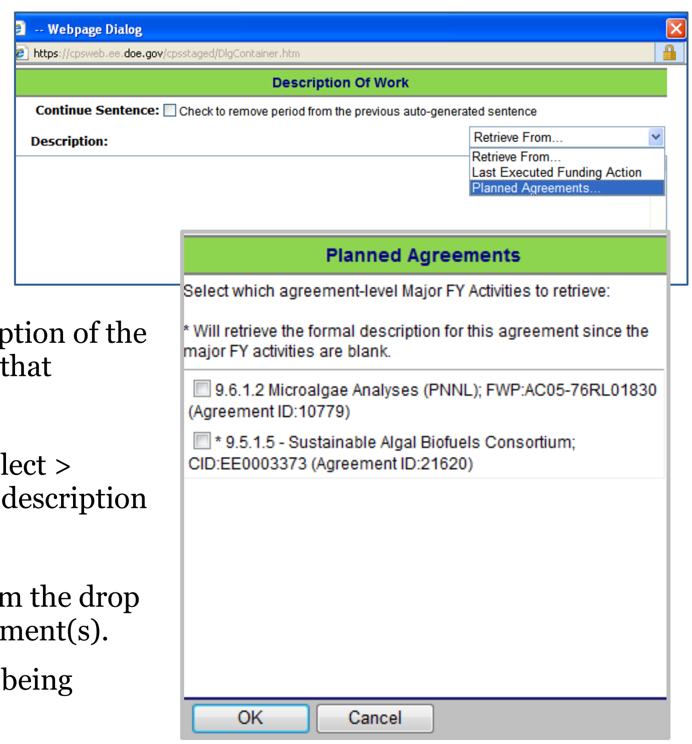


   c. The Remaining Amount will total zero when all funding is planned.

5. Under Description of Work , click > Hypertext for pop-up window or click > Edit to add the Agreement description.



6. Once the pop-up window has appeared there are three ways in which to proceed in adding an Agreement description to the funding action.



   a. Write your own description of the work for each Agreement.

   b. If the Agreement has been previously funded, the Agreement description can be recalled by selecting from the Retrieve From drop down menu to retrieve the description of the last executed funding action associated with that Agreement.

   c. From the Retrieve From drop down menu select > Planned Agreements to use the Agreement's description of work for the funding action.

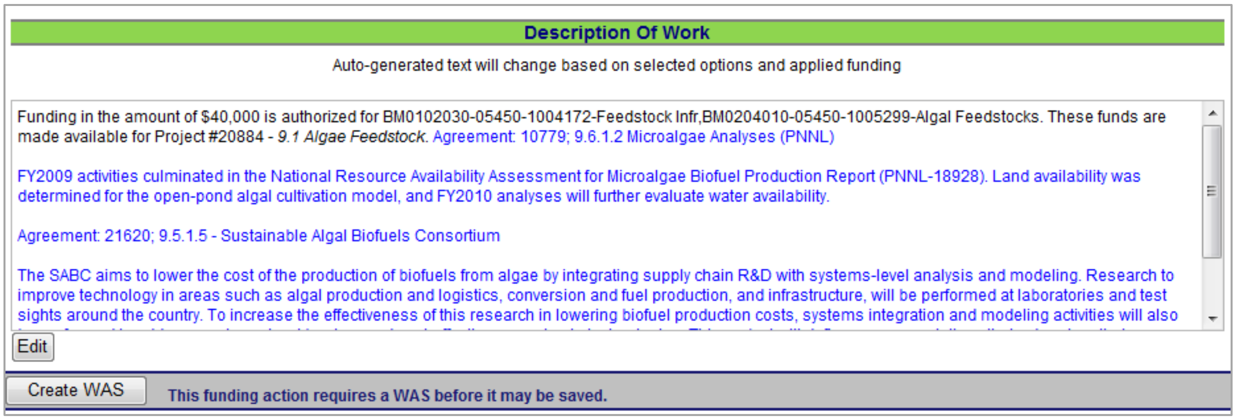
      i. If using the Retrieve From option from the drop down menu, choose > Planned Agreement(s).

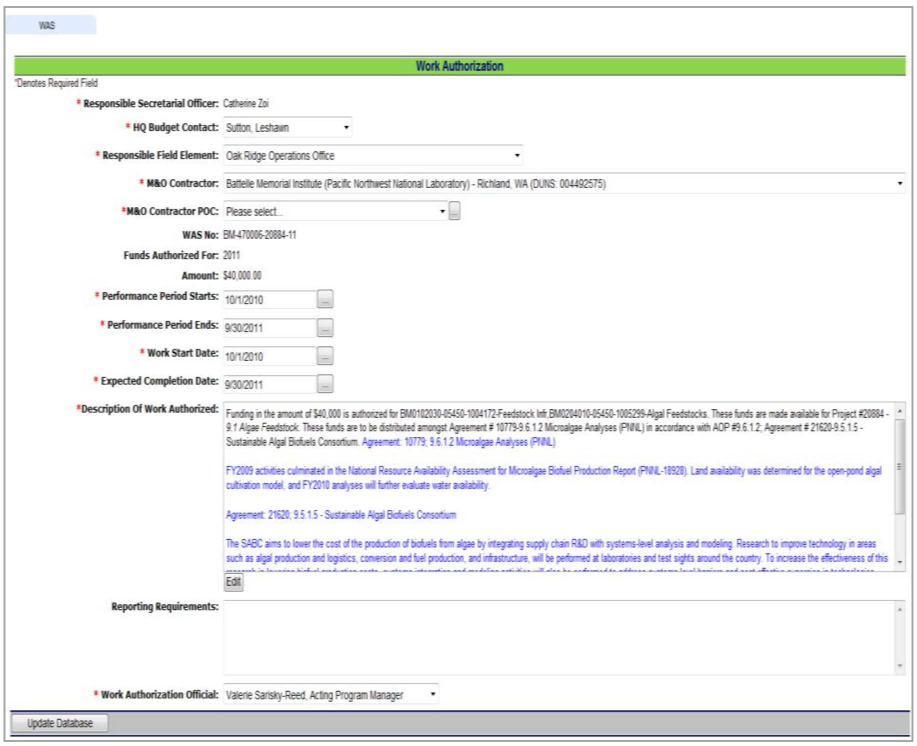
      ii. Check the boxes of the Agreement(s) being funded for the Funding Action.

7. When the Agreements have been checked, select > OK for pop-up windows.

8. If the funding action is for a PMC, select > Update Database to save the funding action in CPS.

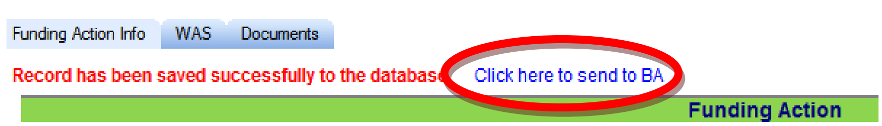
9. For Lab Funding Actions, select > Create WAS from the bottom of the page.
    a. WAS is auto-populated based on the funding action information, but can be updated if necessary.





    b. Once the information in the WAS has been verified, select > Update Database from the WAS form.

10. When all the information is added and accurate, click > Send the Funding Action to the Budget Analyst.

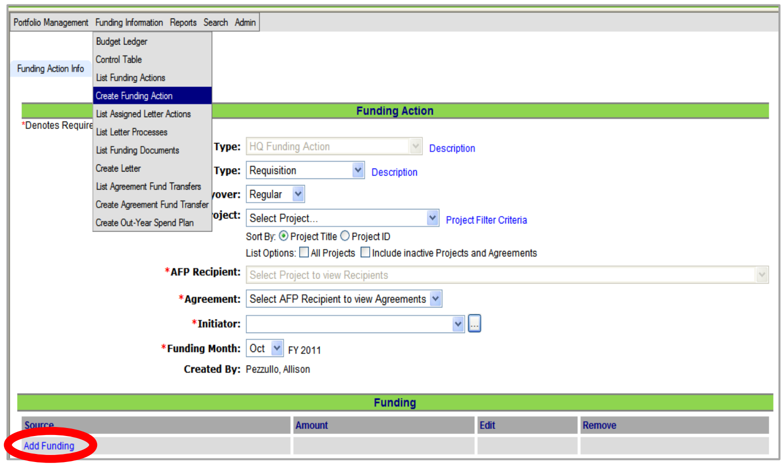


More information can be found on page 53 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

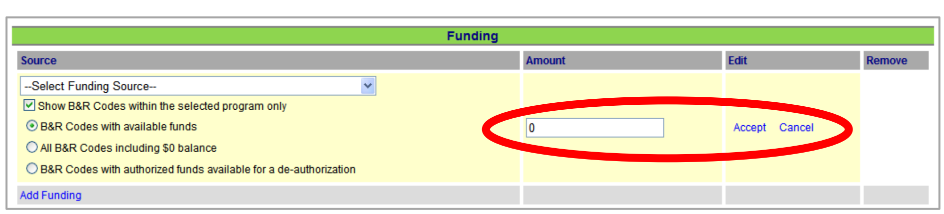
Creating an HQ Funding Action

Headquarters funding actions are used to fund support service, Interagency, and Intra-Agency contracts, as well as smaller items such as conferences, supplies, and subscription purchases. HQ Funding Actions are continually processed and thus are not a part of the regular AFP cycle.

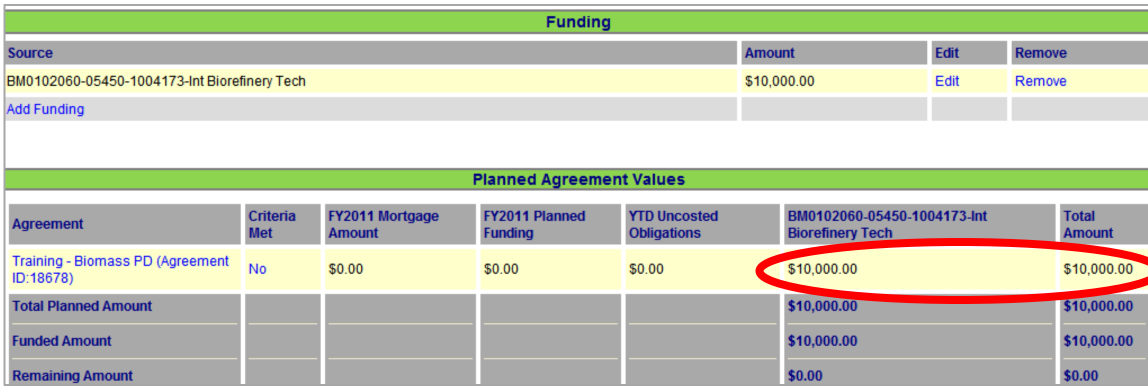
To create an HQ Funding Action, complete the steps below.



1. Determine the headquarters Agreement to be funded. Select the corresponding icon in the navigation window.
2. Go to the Funding Information menu and select > Create Funding Action.
3. Enter quality information into the corresponding fields. When creating a new headquarters funding action, the red asterisks denote a required field.
    a. At the top of the Funding Action page, change the <u>Funding Action Type</u> to HQ Funding Action.
    b. Select the <u>HQ Funding Action Type</u> from the drop down menu. Most often a Requisition or Memo will be used to categorize the headquarters funding action. HQ funding actions will be routed through a separate procurement system called STRIPES. They do not require e-signature within CPS.
        i. A <u>Direct Charge</u> authorizes funds for direct charge transactions for headquarters Agreements.
        ii. A <u>Credit Card</u> funding action authorizes funds for transactions made on a credit card for a headquarters Agreement.
        iii. A <u>Requisition</u> authorizes funds for supplies, equipment, or services for a headquarters Agreement.
        iv. A <u>Memo</u> authorizes funds for a memo for a headquarters Agreement.
        v. A <u>2-Stage HQ Requisition</u> is used when authorizing funds on a headquarters Agreement from a B&R Code or a group of B&R Codes that is outside the authority of the manager who is responsible for the activity.
        vi. An <u>HQ De-Authorization</u> is used when de-authorizing funds from an existing headquarters authorization funding action.
    c. Determine whether the headquarters funding action is to use <u>Regular</u> funds (current fiscal year) or <u>Carryover</u> funds (previous fiscal years).
    d. Selecting the headquarters Agreement at the beginning of the process will automatically populate the <u>Project</u>, <u>AFP recipient</u>, <u>Agreement</u>, and <u>Initiator</u> fields.
    e. The <u>funding month</u> will default to the current month. A later month can be chosen if preferred, and the headquarters funding action will be deferred for processing at that time.
4. Under the Funding heading select > Add Funding.
5. Use the drop down box to the B&R Code(s) that will fund the headquarters Agreement.



6. Under the Planned Agreement Values heading:
    a. The Plan Values will automatically post to the corresponding Agreement.



Funding

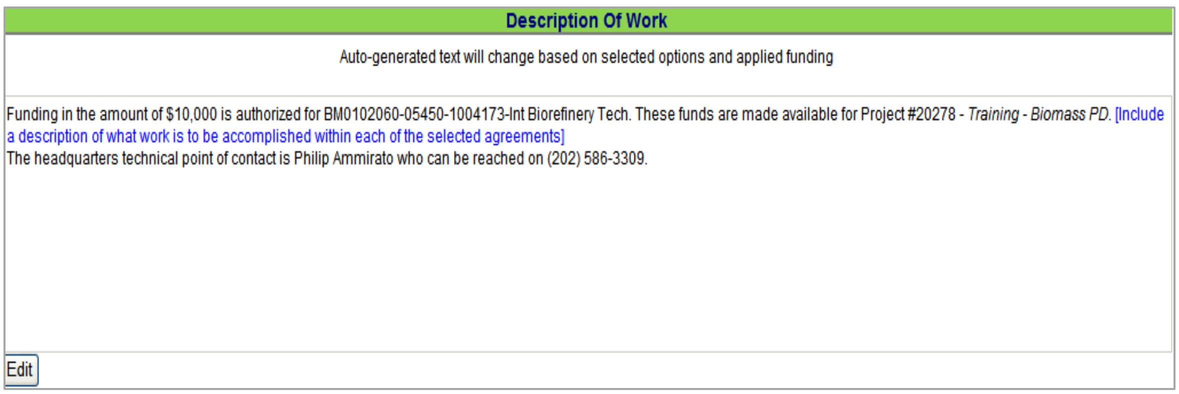
Source	Amount	Edit	Remove
BM0102060-05450-1004173-Int Biorefinery Tech	$10,000.00	Edit	Remove
Add Funding			

Planned Agreement Values

Agreement	Criteria Met	FY2011 Mortgage Amount	FY2011 Planned Funding	YTD Uncosted Obligations	BM0102060-05450-1004173-Int Biorefinery Tech	Total Amount
Training - Biomass PD (Agreement ID:18678)	No	$0.00	$0.00	$0.00	$10,000.00	$10,000.00
Total Planned Amount					$10,000.00	$10,000.00
Funded Amount					$10,000.00	$10,000.00
Remaining Amount					$0.00	$0.00

    b. The Remaining Amount will total zero when all funding is planned.

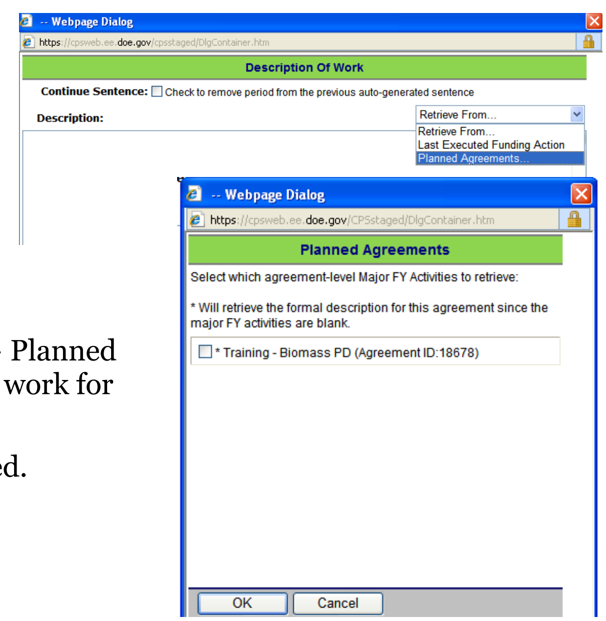
7. Under the Description of Work heading, add a description by clicking the hypertext for a pop-up window, or click > Edit.*



8. Once the pop-up window has appeared there are three ways in which to proceed to add a headquarters Agreement description to the funding action.

    a. Write your own description of the headquarters Agreement (work to be funded) in the space below Description.

    b. If the headquarters Agreement has been previously funded, the Agreement description can be retrieved from the last executed funding action associated with that headquarters Agreement.



    c. From the Retrieve From drop down menu select > Planned Agreements to use the Agreement's description of work for the funding action.

9. Check the box of the headquarters Agreement to be funded.

* Note: For Requisitions, the description of work should include the contract name and task number to be funded. If a new task is required, state so in the description of work and separately send the Statement of Work (SOW) and Government Cost Estimate (IGCE) to the Program's procurement specialist. For sensitivity reasons, the Cost Estimate should never be uploaded to CPS.

10. When the headquarters Agreement has been checked, select > OK on the pop-up window to return to the funding action page.

11. On the funding action page, select > Update Database to save the funding action in CPS.

12. When all the information is added and accurate, click to send the Funding Action to the Budget Analyst. This will send an e-mail to the Program's Procurement Specialist notifying them to begin processing the HQ funding action. Note: If the funding action was created for an out-month, it should not be sent to BA for processing until the selected month arrives.

More information can be found on page 60 of the CPS Desktop Reference. The link is located on the home page of the CPS website. See the footnote for further information on adding a description of work to a HQ Funding Action.

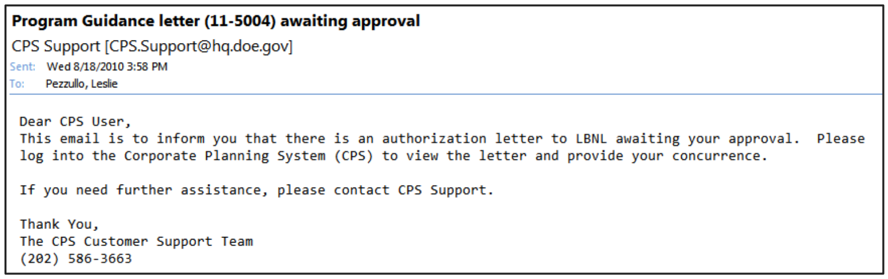
E-Signatures

Workflow Approval Process:

E-Signature is a method to electronically route funding documents to the Program staff to review, edit, and provide their concurrence. A workflow is generated by the budget analyst every month in CPS to include Technology Development Managers, Team Leads, and Program Managers. Within the electronic signature process, TDMs and Team Leads have the opportunity to review their funding actions and make necessary edits prior to providing concurrence.

To participate in the Workflow Approval Process, complete the steps below.

1. CPS Support will auto-generate an e-mail advising the user that a Program Guidance Letter is awaiting their response in CPS. This e-mail will contain the guidance letter number that is associated with the funding document. When this letter arrives, log onto CPS.



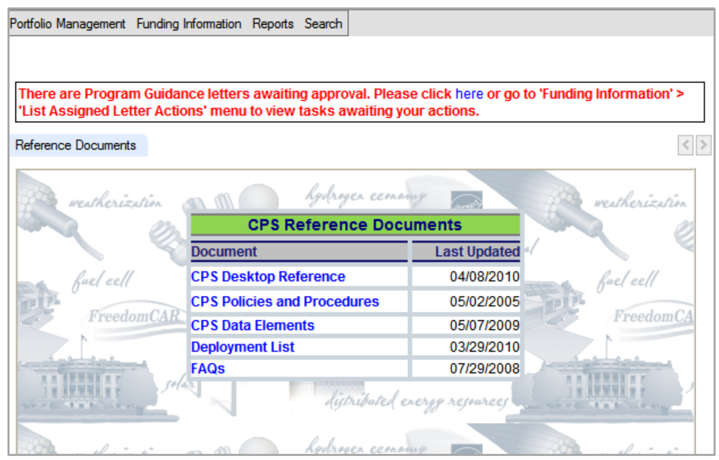
Program Guidance letter (11-5004) awaiting approval
CPS Support [CPS.Support@hq.doe.gov]
Sent: Wed 8/18/2010 3:58 PM
To: Pezzullo, Leslie

Dear CPS User,
This email is to inform you that there is an authorization letter to LBNL awaiting your approval. Please log into the Corporate Planning System (CPS) to view the letter and provide your concurrence.

If you need further assistance, please contact CPS Support.

Thank You,
The CPS Customer Support Team
(202) 586-3663

2. There are two ways of viewing the workflow containing the guidance letter.
   a. On the home page of CPS, select the blue hyperlink > here to view the assigned workflows.
   b. Go to the Funding Information menu and select > List Assigned Letter Actions to view the assigned workflows.



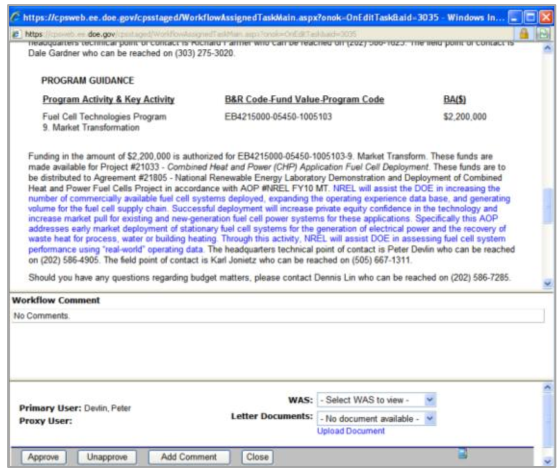
3. Locate the letter within the Assigned Letter Actions page. Select the Actions hypertext associated with that workflow, then select > Open Letter for Approval.

Assigned Letter Actions EERE (FY 2010)

Letter Amount	Letter Type	Description	All Actors Required	Primary User	Proxy User	Process Status	Task Status	Action
$1,840,515.00	Authorization	Initiator Approval	Yes	Devlin, Peter		Concurrence - Initiator	Ready for Action	Actions...
$3,400,000.00	Authorization	Initiator Approval	Yes	Devlin, Peter		Concurrence - Initiator	Ready for Action	Actions...
$2,906,389.00	Authorization	Initiator Approval	Yes	Devlin, Peter		Concurrence - Initiator		
($774,632.00)	Deauthorization	Team Lead Approval	Yes	Devlin, Peter		Concurrence - Team Lead		

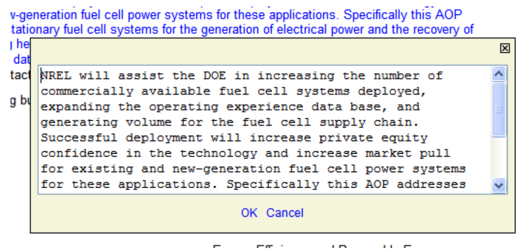
Open Letter for Approval
See Workflow
Preview Letter
Set Proxy for this Task

4. A pop-up window will appear with the funding documents in a letter format. The CPS user will be able to edit any sections of the letter that are highlighted as hypertext, such as the description of work.



5. To make edits, click on the hypertext to open an editing window.

   a. Some essential pieces of information, such as the B&R code, AFP recipient, and funding amount, are not editable within the letter. If changes are required to any of these fields the letter should be Unapproved; the letter will need to be recreated with the corrected information.

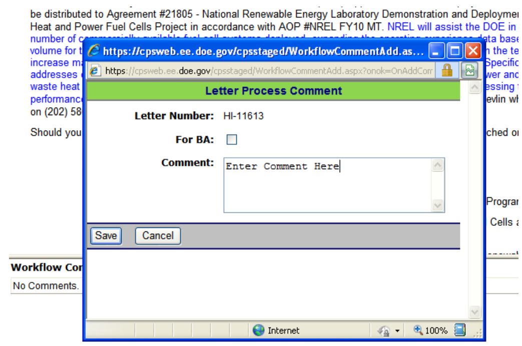


6. When reviewing and editing the funding document, the CPS user has the ability to communicate with their colleagues and budget analysts using the comment feature.

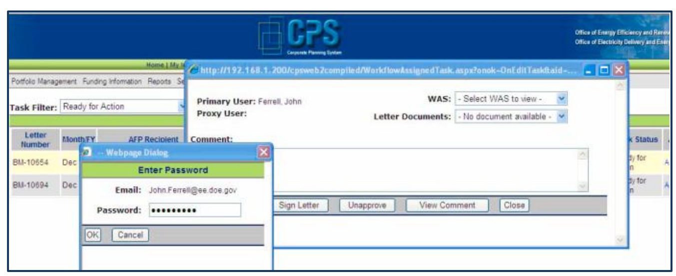
   a. When the letter is 'opened for approval' select > Add Comment from the bottom of that window.

   b. From there another pop-up window will appear to enter a comment. To direct the comment to the budget analyst check the box > For BA.

   c. Enter your comment and click > Save.



7. If you are a Program Manager and need to E-Sign, select > Approve. The password will be the same as your CPS login password.



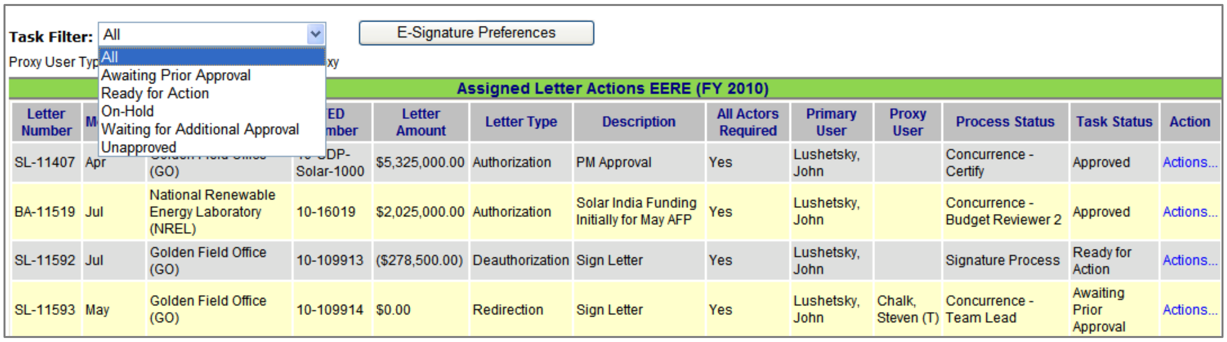
More information can be found on page 84 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

Monitoring a Workflow:

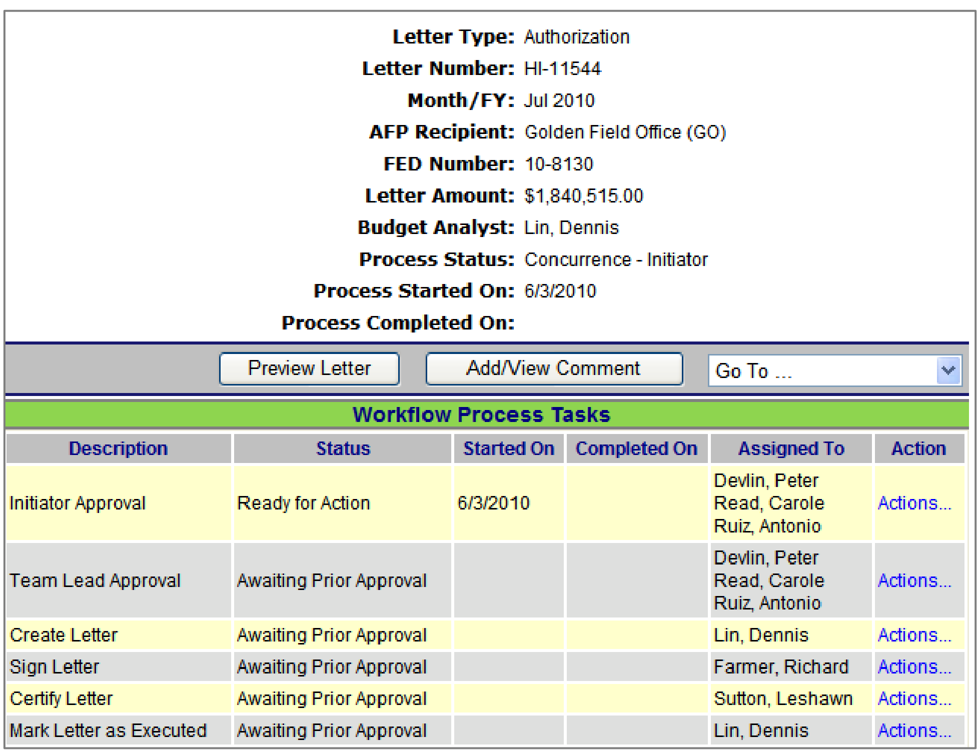
CPS users can also monitor the progression of each assigned workflow, either before or after their concurrence. This view allows users to easily see who has approved a letter, and whose desk it is currently on.

To monitor a Workflow, complete the steps below.

1. From the Funding Information menu, select > List Assigned Letter Actions.
2. When the assigned letter actions are listed, go to the Task Filter drop down menu and select > All to view all of the assigned workflows.



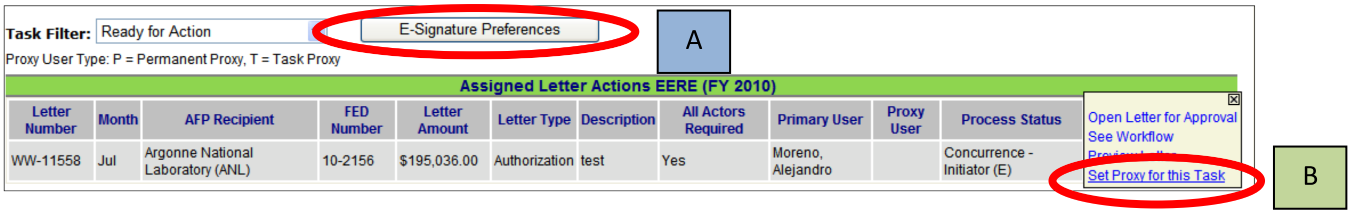
3. In this view CPS users can view the Process Status (the stage the letter is at in the concurrence process) for their funding documents.
4. For a more detailed view, select the Actions hypertext from the table and click > See Workflow to view the entire workflow structure. This will provide details about assigned users for each task, as well as start and completion dates for each step.



More information can be found on page 89 of the CPS Desktop Reference. The link is located on the home page of the CPS website.

E-Signature Proxies:

The proxy feature for CPS users on e-signature workflows can be utilized to appoint a colleague to approve funding documents in their place. Proxies can be appointed for individual workflows or for an extended amount of time.

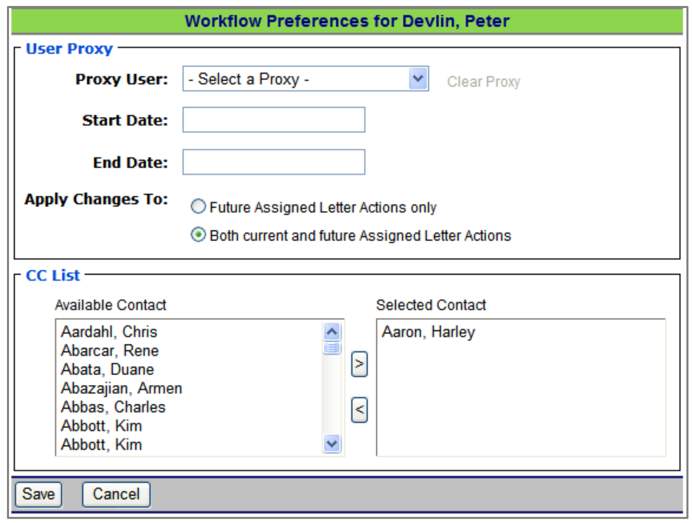


A

To assign a Proxy when a CPS user is out of the office, complete the steps below.

1. Select E-Signature Preferences.
2. A pop-up window will appear. Choose a proxy from the drop down menu.
3. Enter the start and end dates for the proxy.
4. Click > Save on the bottom of the window to update the workflow.

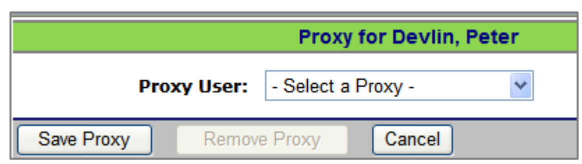
   Note: Users can also use this view to establish any individuals that should be CC'd on their notification e-mails from CPS when a guidance letter is awaiting their concurrence.



B

To assign a Proxy for individual workflows, complete the steps below.

1. From the Assigned Letter Actions page, select the Actions hypertext and click > Set Proxy for this Task.
2. A pop-up window will appear with all eligible proxies. Select a Proxy User from the drop down menu.
3. Select > Save Proxy to update the workflow.



More information about assigning a proxy per assigned task can be found on page 16 of the CPS Desktop Reference. More information about assigning a proxy with E-Signature Preferences can be found on page 97 of the CPS Desktop Reference. The link is located on the home page of the CPS website.