UNITED STATES DEPARTMENT OF AGRICULTURE
Farm Service Agency
Washington, DC 20250

Notice AS-2094

For: State Offices

Instructions for Corporate Property Automated Information System (CPAIS)

Approved by: Deputy Administrator, Management

1 Overview

A Introduction

OMB instructed USDA to develop a departmentwide Asset Management Plan (AMP) for real property operations and management.

- The automated inventory management component of the USDA AMP is CPAIS.
- AMP is mandated for implementation by close of FY 2005.
- **September 22, 2005, is the report deadline**.

B Purpose

CPAIS implemented for real property management in FY 2004, is the USDA standardized tool for managing all departmental real property data. FSA will use CPAIS to record and track all data for its FSA commercial leases and GSA assignments. CPAIS is a web-based system managed by and linked through NFC. Only designated MSD and State Office employees who have completed formal training will be authorized to access and use CPAIS for FSA. MSD designates 1 Property Operations Branch (POB) employee to serve as the CPAIS point of contact (POC) for all FSA CPAIS users.

MSD uses the data recorded in CPAIS to prepare recurring reports mandated by the USDA Office of Procurement and Property Management (OPPM), OMB, GSA, and Congress.

C OMB Deadline

OMB mandated that each USDA agency complete all updates to their CPAIS records as part of AMP implementation. FSA CPAIS users at the State Office level must enter all updated lease data in CPAIS Leased Property form and Maintain Property Records form mandatory data fields by **September 22, 2005**, for State and County Office records. The data now residing in State Office CPAIS records is data converted from the Foundation Information for Real Property Management (FIRM) system. State Offices should review each record to be certain that the State Office is completing all records that require updates.

Disposal Date	**Distribution**
November 1, 2005	State Offices

1 Overview (Continued)

C OMB Deadline (Continued)

Paragraph 2 provides instructions for CPAIS logon, usage of 5 major CPAIS forms, and required data fields for each form.

Note: For the **September 22, 2005, deadline** State Offices are responsible only for:

- entering all updated lease data in the CPAIS Leased Property form
- maintaining the Property Records form mandatory data fields.

See instructions provided in subparagraphs 2 A and C. CPAIS POC will attend to the other forms for now.

D Field Office Responsibilities Ongoing

These instructions are given for State Office ongoing CPAIS responsibilities. State Offices shall maintain and update CPAIS for each of their County Offices as leasing changes occur. County Offices shall provide State Offices with all leasing data that State Offices need to maintain and update CPAIS as leasing changes occur.

Each State Office designated 1 primary and 1 backup user for CPAIS at the time of implementation. State Offices with small staffs were allowed to designate 1 user only, upon request to the CPAIS POC. Initial State Office and Headquarters CPAIS users received formal training and CPAIS access in the 4^{th} quarter of FY.

Each State Office must maintain, at all times, a minimum of 1 employee with an active CPAIS user ID and password. When a State Office CPAIS user leaves State Office service, the State Office shall notify the CPAIS POC. The State Office shall then designate a replacement CPAIS user and submit the employee's name to the CPAIS POC. The CPAIS POC will coordinate and schedule training with OPPM and OCFO according to USDA requirements and availability. When training is completed the employee shall submit AD-1143 to the CPAIS POC.

E General Instructions for CPAIS Login

New users opening the CPAIS application for the first time will need to perform the CPAIS Desktop Set-Up. See Exhibit 1.

CPAIS requires Internet Explorer 5.5 or later on the workstation. The workstation must have sufficient memory to run the CPAIS application. Depending on the operating system version being used, a minimum of 256 MB of memory is required.

1 Overview (Continued)

E General Instructions for CPAIS Login (Continued)

The CPAIS Application Login page can be accessed by either of the following methods:

- go to FFAS Intranet home page and ENTER: **https://cpais.ocfo.usda.gov**
- go to FFAS Intranet home page and ENTER: **www.nfc.usda.gov**, click on “USDA Corporate Systems”, click on “CPAIS”, and click on “CPAIS Application Login.”

On the CPAIS Application Login page, enter assigned user ID and password.

Note: The user may then change the password to something personalized.

A successful login will display the CPAIS Main Menu. Click on “Real Property Management” on the shaded box on the left side of the screen. User will be working exclusively in this portion of the application.

The Real Property Management screen will display a menu of CPAIS forms.

CPAIS Form Title	Records Contained on the Form
Leased Property	Commercial lease records.
GSA Assignments	State and County Office GSA space.
Maintain Property Records	Building records that are linked to corresponding leased property and GSA assignment records.
Collocation Assignment	Space breakdown details for collocated offices where FSA is the lead agency.
Agency Occupancy Update	FSA occupancy data for collocated offices where FSA is not the lead agency.

Note: There are data fields in each of the 5 forms that **must** be filled and updated to fulfill the reporting requirements of USDA, GSA, OMB, and Congress.

Brief descriptions for using each of the 5 CPAIS forms and data fields that State Offices are required to fill will be provided in paragraph 2, from the viewpoint of updating already existing records. The CPAIS records for State Offices were converted from FIRM. If State Offices need to create a new record, use the following tools:

- CPAIS training manual
- CPAIS online help directory
- calling the CPAIS POC.

2 Form Usage

A Using the Leased Property Form

Click on “Leased Property” on CPAIS Main Menu to open this form. The user will do the following to run a query to display all the records for “Form” State:

- click the binoculars icon in the button bar near the top of the screen; several data fields are now shaded yellow

- click the drop down arrow to the right of “Agency” data field and click “FA” from the choice list that appears

- click on the “Execute” button in the top portion of the screen.

Data will now display in several of the data fields. The State Offices name will appear alongside an identification number in the upper left data box, below the headings “Inst. ID” and “Installation Name”. The users:

- State should be the only 1 appearing under “Installation Name”

- State and County Office names in which FSA holds the lease will display in the middle left data box, below the headings “Site” and “Site Name”.

When the user highlights a site name on the left, the user will see data on the right that corresponds to that site. Only agreements from the user’s State should display. These are the records the user is responsible for managing in this form.

There are 6 main tabs along the upper portion of the Leased Property form:

- “Installation”
- “Lease”
- “Buildings”
- “Land Units”
- “Other Structures”
- “Mods.”

The “Installation” and “Lease” tabs each contain sub-tabs below them. Clicking on a main or sub-tab will open a screen with data fields. When initially accessed, the screen will display the fields on the “Installation” main tab and “Installation Site” sub-tab. The user will be filling and updating data fields on the “Installation”, “Lease”, and “Buildings” main tabs and the applicable sub-tabs. The user will **not** use the “Land Units”, “Other Structures”, or “Mods” main tabs.

2 Form Usage (Continued)

A Using the Leased Property Form (Continued)

The data fields in the Leased Property form that **must** be filled and updated are as follows:

Note: Some of these fields are filled.

- on the "Installation" main tab and "Installation Site" sub-tab:

  - Inst. ID and Installation Name
  - Agency, GSA Region and Org
  - Site and Site Name
  - Geo State, Geo County, Geo City and Org
  - Street Addr. 1, County/Country, City and Zip Code
  - Cong. District ID

- on the "Lease" main tab and "Lease" sub-tab:

  - Lease No. and Name
  - Expiration Date and Managing Org
  - Status, Effective Date and Annual $

- on the "Lease" main tab and "Dates/Options" sub-tab:

  - Termination Notice (Days) and Option Period (Years)
  - Lease, Level of Service

- on the "Buildings" main tab:

  - Building ID, Name and Predominant Usage
  - Floor Name and Room Name
  - Space Usage Type and Space
  - UOM and Price/UOM.

  Note: The user does **not** need to break down the space by individual floors and rooms. For the Floor Name and Room Name fields **only** fill in the top line with the following generic data:

  - "Floor 1"
  - "Room 1".

  The user may then fill in the total square footage under the Space field that occupies the same top line. Most of the records will be pre-filled, requiring the user to **only** enter updated square footage and rental rates in records where needed.

2 Form Usage (Continued)

B Using the GSA Assignments Form

Click on “GSA Assignments” on the CPAIS Main Menu to open this form. The user will do the following to run a query to display all the records for “Form” State:

- click the binoculars icon in the button bar near the top of the screen
- click the drop down arrow to the right of “Agency” data field and click:
  - “FA” to display state level records
  - “CE” to display county level records
- click on the “Execute” button in the top portion of the screen.

A list of alphanumeric ID’s will display below the heading “Agreement ID”. These ID’s identify occupancy agreements for FSA offices in the State that reside in GSA-owned or -leased space. These are the records the user is responsible for managing in this form.

The user will need to use the:

- “GSA Assignments” main tab with the “Details” and “Options” sub-tabs
- “Comparison” main tab.

Note: The user will **not** use the “Mods” main tab.

Highlighting an Agreement ID will display the data for the office corresponding to that occupancy agreement. All data residing on the “GSA Assignments” main tab and ”Details” sub-tab should match the information from the current occupancy agreement. These agreement records are what the user will compare with the GSA monthly billings. To do a comparison with a highlighted Agreement ID from the “GSA Assignments” main tab and “Details” sub-tab:

- click on “Comparisons” main tab
- enter a month/year in the “Month to Compare” data field
- click the “Compare” button.

The latest GSA Rent On the Web bill for your chosen agreement will display on the screen.

Note: If any discrepancies exist between this GSA bill and the agreement, the affected data fields will be automatically highlighted on screen. Refer to your CPAIS training manual for details on creating an adjustment and generating a GSA form 2972. Completed GSA form 2972’s should be printed and FAXed to CPAIS POC at 202-690-4790.

2 Form Usage (Continued)

B Using the GSA Assignments Form (Continued)

The data fields in the GSA Assignments form that **must** be filled and updated are, on the "GSA Assignments" main tab and "Details" sub-tab:

- Agency and Agreement ID
- Name, Expiration Date, and Org
- Monthly Rental Amount and Annual Rental Amount
- Property ID, Name, Region, and CBR
- Charge Type, Units, UOM, Rate/Year and Monthly $.

C Using the Maintain Property Records Form

Click "Maintain Property Records" on CPAIS Main Menu to open this form. The user will do the following to run a query:

- click the binoculars icon in the button bar near the top of the screen
- select "FA" from the drop down list on the "Agency" data field
- click on the "Execute" button in the top portion of the screen.

A list of ID's and corresponding names will display under the headings "Building ID" and "Name". Highlighting a building ID will display the data for the corresponding building on the "Buildings" main tab and "Details" sub-tab. Clicking on subsequent sub-tabs will reveal more data fields for the current highlighted building. Only building ID's from the user's State should display. These are the records the user is responsible for managing in this form.

The user will use the "Buildings" main tab and "Details", "Details Cont." and "Accessibility" sub-tabs. The user will **not** use the "Address", Operation/Energy", or "Acquisition" sub-tabs or the "Land Units" and "Other Structures and Facilities" main tabs.

Note: Maintain Property Records form may also be accessed through a link in the Leased Property form. When you have executed a query and highlighted an Installation Site record on the "Installation" main tab of the Leased Property form and clicked on the "Buildings" main tab, the user will see a button titled "Maintain Buildings" in the top portion of that screen.

By clicking on the "Maintain Buildings" button the user will be transferred to the corresponding record on the Maintain Property Records form's "Buildings" main tab and "Details" sub-tab. Under the "Occupancy" heading on the bottom portion of the "Buildings" main tab, the user will need to select either of the following:

- Agency "FA" for State Office occupancy
- Agency "CE" for County Office occupancy.

2 Form Usage (Continued)

C Using the Maintain Property Records Form (Continued)

The data fields in the Maintain Property Records form that **must** be filled and updated are as follows:

Note: Some of the data fields are filled.

- on the "Buildings" main tab and "Details" sub-tab:
  - Building ID, Name and Agency
  - Property Type, Predominant Usage and Org
  - Status and Gross SqFt
  - Floor, Room, Space Usage Type, Space and UOM
  - (Under "Occupancy" heading): Agency, Personnel Type, No. of Personnel, and No. of Workstations
- on the "Buildings" main tab and "Details Cont." sub-tab; Historical Status
- on the "Buildings" main tab and "Address" sub-tab (For GSA Assignment Offices Only); all "Physical Address" fields
- on the "Buildings" main tab and "Accessibility" sub-tab:
  - Accessibility Status
  - Accessibility Compliance.

D Using the Collocation Assignment Form

Click on "Collocation Assignment" on CPAIS Main Menu to open this form. The user will do the following to run a query to display Collocation Assignment records:

- click the binoculars icon in the button bar near the top of the screen
- click the drop down arrow to the right of "Agency" data field and click "FA" from the choice list that appears
- click on the "Execute" button in the top portion of the screen.

A list of numbers will display under the heading "Agreement ID". Highlighting an agreement ID will display the data for the corresponding Collocation Assignment record. Each agreement ID matches a lease number from the Leased Property form and represents the user's State or County Offices where FSA as lead agency is collocated with 1 or more other agencies. Only agreements from the user's State should display. These are the records the user is responsible for managing in this form.

2 Form Usage (Continued)

D Using the Collocation Assignment Form (Continued)

There are no main tabs or sub-tabs in the Collocation Assignment form, but there is a button titled “Add/Edit Tenant” in the “tenant data” box that the user will need to use. The user cannot type data into the Tenant Name or ID fields in the “tenant data” box. The user must click the “Add/Edit Tenant” button and that will transfer the user to the Contacts screen. On the Contacts screen all the red coded fields **must** be filled. The user should complete the red coded fields as follows:

Red Coded Field	Content
Agency	ENTER “FA”.
Last Name/Org.	Name of the lead agency for collocation. ENTER the appropriate agency from the following list: • FSA • NRCS • RD. **Note:** For sites that are collocated this is the most important data field on the Contacts screen.
	The remaining fields have generic content.
Contact Type	ENTER “Person”.
Phone No. Type and Address Type	ENTER “Business”.

When the red coded fields are complete click “Save” to save the data and return to the Collocation Assignment screen. The screen will display a new Tenant Name field that has been auto-filled from the Last Name/Org. field just filled on the Contacts screen. The user will click “Add/Edit Tenant” again if the user needs to add more Tenant Name lines or update existing lines.

The data fields in the Collocation Assignment form that **must** be filled and updated are as follows:

- on the Collocation Assignment data screen:

  - Agreement ID, Agency, and Managing Org
  - Type, Title and Building ID
  - Tenant Name and ID
  - Start Date, End Date, Floor and Room
  - Space Usage Type, UOM and Space

2 Form Usage (Continued)

D Using the Collocation Assignment Form (Continued)

- on the Contacts data screen from the Add/Edit Tenant button:
  - Agency
  - Last Name/Org
  - Contact Type
  - Phone No. Type and Address Type.

E Using the Agency Occupancy Update Form

Click on “Agency Occupancy Update” on CPAIS Main Menu to open this form. The user will do the following to run a query to display collocated State and County Offices in which FSA is **not** the lead agency:

- click the binoculars icon in the button bar near the top of the screen
- click the drop down arrow to the right of “Agency” data field and click 1 of the following agencies that is collocated with FSA:
  - RD
  - NRCS
  - other agency
- click on the “Execute” button in the top portion of the screen.

A list of building ID’s will display under the building heading for the agency the user has chosen. Highlighting any building ID will display data in other fields on screen that correspond to the office identified by that building ID. These records are for locations in the user’s State where RD, NRCS or other agency is the lead agency.

The user will use the Agency Occupancy Update form to fill and update data fields under the “Occupancy” heading on the bottom portion of the screen for the user’s collocated State and County Offices in which FSA is **not** the lead agency. These are the **only** data fields the user is responsible for managing in the records inside the Agency Occupancy Update form. There are no tabs or buttons linking to supplementary data screens in this form.

The data fields for the Agency Occupancy Update form that **must** be filled and updated are, on the Agency Occupancy Update data screen:

- Agency and Personnel Type
- No. of Personnel and No. of Workstations.

3 Contacts

A CPAIS POC

Any CPAIS real property question or problem that cannot be resolved by an FSA user must be reported to the CPAIS POC at 202-720-7005.

B Update Completion

When State Offices have completed CPAIS updates, send an e-mail confirmation of completion to **steve.jones@wdc.usda.gov**.

C Questions

State Offices may call Steve Jones at 202-720-8729 with any questions about this notice.

CPAIS Desktop Set-Up

CPAIS requires that Internet Explorer 5.5 or later be installed on the workstation. The workstation must have sufficient memory to run the CPAIS application. Depending on the operating system version being used, a minimum of 256 MB of memory is required.

To run CPAIS on your desktop, a Java plug-in, JInitiator, will be required. This plug-in may be downloaded to your desktop from the CPAIS server the first time you login after the implementation date of May 24, 2004.

Step	Action
1	Click on the link to the CPAIS Web site from CPAISNet **https://cpais.ocfo.usda.gov** and the warning banner will appear.
2	After clicking on "Continue", the login screen, "CPAIS Secure Authentication Login," will appear. Enter your assigned user ID and password and PRESS submit.
3	After successful login, there is 1 tab each for Forms, Reports, and Discoverer. Select the appropriate tab and click your property assignment (i.e., Real Property Management) from the menu structure on the left of the screen. Double-clicking a module name (i.e., Lease Property) will start the execution of a Form, Report, or Discoverer Workbook. This is the step where JInitiator will be downloaded to your desktop.
4	The plug-in will be installed through your web browser as any regular plug-in would typically be installed.
5	The download of the plug-in takes place in the background with a white, blank screen titled "Oracle9iAS Forms Services" displayed during the download. **Note:** Be patient, the plug-in is a large file and this process may take a few minutes.
6	After the plug-in is downloaded, the installation process will automatically start. Follow the directions for the installation process and accept the indicated defaults.
7	Upon completion of the installation, the Form, Report, or Discoverer Workbook will execute and open.

Exception: For some agencies, the privileges assigned to your user ID on your local workstation determine whether or not software can be downloaded and installed.

Example: If your are running Windows 2000 or Windows XP, and have Administrator or Standard User (Power Users Group) privileges, you may proceed with the installation of the plug-in.

If you do not have the proper privileges, or may be having problems with the plug-in installation, contact your Agency Help Desk for further assistance. The IT Support Staff with need to complete the installation on your workstation for you.

Notes: A link to the JInitiator plug-in can be found on CPAISNET at "JInitiator Download". This page has instructions on how to download and install the plug-in separate from the application.

If is a problem or you have a question that is not answered by your Agency Help Desk, contact your FSA CPAIS POC.