

# CPAIS QuickGuide: User Management Application (UMA)

## Accessing the User Management Application

If you do not have any roles or organizations associated with your account, you will be redirected to the User Management Application. If you would like to modify your account or view your account details, you can access UMA from the Main Menu. For more information, see [Creating and Modifying Accounts](#).

### To access the User Management Application:

1. Log on to CPAIS.
2. From the Main Menu, click **System Management**.
3. From the list of forms, click **User Management Application**.

## Request a New Account

These instructions are for users who have never had a CPAIS account. If you have an account and want to change your access privileges, see [Modify an Existing Account](#).

To log on to CPAIS you must have a valid eAuthentication account. To view and edit data you must also have a CPAIS account that contains roles and organizations that specify your level of access.

The first time you attempt to log on, you will be redirected to the User Management Application. Using the User Management Application, you request roles and organizations. After submitting your request, an authorized UMA Manager reviews your request and can approve, reject, or modify it.

### To request a new CPAIS profile:

1. Open a web browser window, such as Internet Explorer, and navigate to <https://cpaisprd1.ocfo.usda.gov:8250/>.
2. Click **Continue** to agree to the terms of the Warning message.
3. On the eAuthentication Warning page, click **Continue**.
4. Type your eAuthentication user ID and password into the appropriate fields
5. Click **Login**.  
As a new user, you will be redirected to the User Management Application so that you can request an account.

**Warning!** If you enter an incorrect User ID and password combination three consecutive times, your eAuthentication will be locked for up to an hour.

5. Enter personal information on the Personal Info page. Some of the fields may already be populated based on your eAuthentication account information.
  - **User Name:** Please enter the first part of your eAuthentication user ID. Do not include punctuation, symbols, or non-standard characters, including "@". If your eAuthentication user ID is "tjefferson@ars", type "tjefferson" in the User Name field. You will not be able to change your user name after you complete registration.
  - **Phone Number:** Please enter your office phone number in the following format XXX-XXX-XXXX.
  - **Agency:** Select your agency from the list.

- **Home Org:** You do not have to populate this field, but doing so will assist UMA Managers and HelpDesk personnel should there ever be a problem with your account. Your Home Org is your primary organizational unit.
  - **Supervisor Name:** Please type your supervisor's first and last name in the field.
  - **Remarks:** You do not have to populate this field. If you would like to include special instructions or information about your personal information.
  - Provide as much additional information as possible.
6. Click **Save**.
  7. Click the **View and Request Changes** sub tab.
  8. Select an application from the Application Name list.
  9. Select the role you want to request from the Role Name list. For more information, see CPAIS User Roles.
  10. Select your agency from the Agency list.
  11. From the Available Orgs box, select an organization number from the Filter list to display organizations that you want to add to your account.
  12. Select the organizations you want to assign to the role and click **Move** or **Move All** to pass them to the Requested Orgs box.
  13. Click **Add Selected Orgs** to add the role/organization combination to your request. The request displays in the My Roles and Orgs table. To cancel a request in the My Roles and Orgs table, select it and click **Cancel**. You can cancel requests that have not been acted upon by an UMA Manager.
  14. Click **Save**.  
Your request is sent to an UMA Manager for review and approval. You cannot log on to CPAIS and edit data until your request is reviewed and approved. Once the UMA Manager acts on your request, you will receive an email.
  15. Repeat Steps 8 through 14 for other roles, if necessary.

## Modify an Existing Account

This topic guides you through the process for requesting role and organization privileges for an existing CPAIS account. Account modification requests must be reviewed by an UMA Manager before the changes take effect. You will receive an email notifying you of the UMA Manager's actions.

### To **add** roles and organizations to an existing account:

1. Access the User Management Application (UMA).  
When UMA displays it will default to the Personal Info page and show basic information about your profile.
2. Verify that the information is correct. If you make any changes, click **Save**.
3. Click the **View and Request Changes** sub tab.  
All roles that currently are part of your profile appear in the My Roles and Orgs table. For each role, you can see the following:
  - Organizations you have requested to add that are pending approval;
  - Organizations you have requested to remove that are pending approval; or,
  - Organizations that have been approved by an UMA Manager and assigned to your account.

4. Select an application from the Application Name list.
5. Select the role you want to add to your account from the Role Name list. If you already have the role, but would like to add additional organizations, you still need to select the role.
6. Select your agency from the Agency list.
7. From the Available Orgs box, use the Filter list to search for organizations.
8. Select the organizations you want to add.
9. Click the **Move** or **Move All** links to pass those organizations to the Requested Orgs box.
10. Click **Add Selected Orgs** to request that the role and organizations be added to your account.
11. Click **Save**.  
An UMA Manager will review your request. You will receive an email notification when the UMA Manager has acted upon your request.

**To remove roles and organizations from an existing account:**

1. Access the User Management Application (UMA).  
When UMA displays it will default to the Personal Info page and show basic information about your profile.
2. Verify that the information on the Personal Info page is correct. If you make any changes, click **Save**.
3. Click the **View and Request Changes** sub tab.
4. Select an application from the Application Name list.
5. Select the role you want to modify from the Role Name list.
6. Select your agency from the Agency list.
7. From the Available Orgs box, use the Filter list to search for organizations.
8. Select the organizations you want to remove.
9. Click the **Move** or **Move All** links to pass those organizations to the Requested Orgs box.
10. Click **Remove Selected Orgs** to request that the role and organizations be removed from your account. If you request that all organizations be removed from the role, the role will be removed from your account as well.
11. Click **Save**.  
An UMA Manager will review your request. You will receive an email notification when the UMA Manager has acted upon your request. If you have made a mistake and do not wish to modify your account, select the request in the My Roles and Orgs table and click Cancel Request. You can only cancel a new request.



## CPAIS User Roles

To access CPAIS and view or edit data, you need a valid user account and password. Your account has roles that let you work with certain types of data. When you apply for a user account and password, you will request the roles and organizations that you need access to. Speak with your manager or your agency's CPAIS HelpDesk point of contact if you are not sure which roles or organizations you need to request. For more information, see Request a New Account or Modify an Existing Account.

## REAL PROPERTY

### Real Property Accounting Roles

Role	Description
RPA Stream Manager	Role allows user to create or update current year adjustment transactions using the Value Stream screen. Assumes RPA_DISPOSAL_MGR, as needed, to perform responsibilities. Limited number of access privileges for this role in each agency. Users having this access should be limited to one primary and a backup. Users in this role are also allowed to place an asset in service.
RPA Disposal Manager	Role allows the user to create or update sub-ledger accounts, and create write-off transactions for disposed assets using the Value Stream screen. Assumes the RPA_LOCAL_MGR role, as needed, to perform responsibilities. ** If write-offs are performed at the Department level, this role may not be needed at the agency level.
RPA Local Manager	Role provides access to create and maintain sub-ledgers, and set development status. Users having this access are normally operational accountants who deal with real property
RECON_USER	Role provides access to query records related to a rejected transaction and edit any missing or incorrect data in the record
RPA Reconciliation Manager	Role provides access to query records related to a rejected transaction and approve records that have been edited.

### Real Property Management Roles

Role	Description
RPM Lease Manager	Role allows the user to create, update, and delete lease records and the authority to issue GSA OA billing adjustment requests. Assumes RPM_PROPERTY_MGR role, if needed, to perform responsibilities. A Property Manager is normally assigned this role.
RPM Property Manager	Role allows the user to create, update, and delete assets and link the assets to GSA sites. This role can be assigned to a facility engineer, fiscal manager, or property manager.
RPM Work Item Manager	Role allows user to enter and update deferred maintenance work items and facility master plan information. This role can be assigned to a facility engineer, fiscal manager, or property manager.
RPM Occupancy	Role allows the user to enter occupancy information for assigned

Manager	properties or the collocation property managed by other agencies.
RPM Collocation Manager	Role allows the user to manage collocation agreements.

## Generic Real Property Roles

Role	Description
Contact Manager	Role allows the user to enter different type of contact data into CPAIS. This role is already inherited by all RPA/RPM roles.
FRPP Manager	Role allows an agency user to certify agency data by re-calculating the summary data and updating the status for accuracy and completion.
Read Only	Role allows the user to select all objects for viewing and/or reporting.

## Super User Roles

Role	Description
Headquarters Manager	Role assumes all RPA/RPM/Generic roles, as needed, to perform responsibilities. Users having this role should be limited to the Agency Real Property Management POC and Real Property Accounting POC with one back-up person. Users assigned this role will also run security reports for quarterly certifications. May also have limited Department-level personnel (i.e. COD-PRB) assigned to this role for high-level transactions.
SECURITY_ADMN_MGR	Role allows the user to extract the CPAIS user information obtained from the User Access Form. Using a Discoverer report this user can identify all CPAIS users and their level of access to create a security report. This role is only assigned by a system database administrator.

# PERSONAL PROPERTY

## Personal Property Roles

Role	Description
PP Administrator	**No agencies should have users assigned to this role that allows Administrators to load GSA AutoChoice records and assist with research.
PP Agency Financial Manager	Allows user to change accounting elements, change acquisition dates, provide secondary approval when needed, and update new acct on global acct re-classes.
PP Sr. Agency Prop Mgmt Officer	Role assigned to allow the user to modify Property Data, conduct inventory and modify useful life.
PP Agency Prop Technician	Role assigned allowing the user to modify property data in Staging and Master records and perform inventory functions.
PP Agency Prop	Role assigned allowing the user to modify Staging and Master non-

Technician (No Acct)	accounting data, perform inventory functions.
PP COD HQ Financial Manager	** Restricted to COD users. Allows user to maintain accounting list of value (LOV) tables, control global accounting reclassifications, and provide support to Agencies.
PP OPPM HQ Property Manager	** Restricted to OPPM users. Role assigned to allow the user to set-up the non-accounting List of Values (LOV) tables and over-site.