

CPAIS QuickGuide: Computer Configuration and CPAIS Access (Windows 7 edition)

This QuickGuide gives general guidance on how to configure your computer to run CPAIS. Furthermore, at the end of this QuickGuide appears a section on how to logon to CPAIS. These are only general steps and are not meant to be exhaustive. For full and complete procedures (with more images) see the CPAIS Basics section of [online help](https://cpais.ocfo.usda.gov/onlinehelp_prd_rp/index.htm#basics/mainmenu/index.htm) (https://cpais.ocfo.usda.gov/onlinehelp_prd_rp/index.htm#basics/mainmenu/index.htm), **Setup and Access → Preparation**.

Request an Account

You may not access the CPAIS application unless you have a valid eAuthentication User ID and a CPAIS profile. The only prerequisite to obtain an account is that you attend a CPAIS training session. For more information on obtaining a CPAIS profile, see [User Management Application Help](#).

The following instructions are for users who have never had a CPAIS account. If you have a CPAIS 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 to CPAIS, you will be redirected to the User Management Application. Using the User Management Application, you electronically request roles and organizations. After submitting your request electronically, an authorized UMA Manager will review your request and approve, reject, or modify it.

Open a web browser window, such as Internet Explorer, and navigate to https://cpais.ocfo.usda.gov/prd_rp/index.html.

1. After reading the CPAIS Warning message, click **Continue**.
2. After reading the eAuthentication Warning message, click **Continue**.
3. 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.

6. 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 enter them in this field.

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7. Click **Save**.
8. Click the **View and Request Changes** sub tab.
9. Select an application from the Application Name list.
10. Select the role you want to request from the Role Name list. For more information, see [CPAIS User Roles](#) in the CPAIS Help.
11. Select your agency from the Agency list.
12. From the Available Orgs box, select an organization number from the Filter list to display organizations that you want to add to your account.
13. Select the organizations you want to assign to the role and click **Move** or **Move All** to pass them to the Requested Orgs box.
14. 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.
15. 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.
16. Repeat Steps 9 through 15 for other roles, if necessary.

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System Requirements

The following are the minimum requirements your computer must meet in order to run the CPAIS application:

Item	Minimum Requirement
Memory	256 MB or higher
Operating System	Microsoft Windows 2000 or Windows 7 or newer. Note: CPAIS may run on Windows NT, and/or Windows XP, but these operating systems are not supported.
Browser	Microsoft Internet Explorer 8.0 or higher.
PDF Reader	Adobe Acrobat Reader 4.0 or higher. (For Viewing standardized reports).
Spreadsheet Application	Microsoft Excel 2003 (Office 2000 SR-1) or newer. (For use with CPAIS's "Export records to a file" function.)

Notes:

- Web browser "popup blockers" will prevent CPAIS from operating correctly – you will not be able to launch any forms. Disable any popup blocker software before logging onto CPAIS.
- If installed on your computer, disable SecuRemote before logging onto CPAIS. Right-click on the icon appearing on the Windows Start bar, near the clock, and select "Stop VPN-1 SecureClient".
- Additional troubleshooting information is contained in the following documentation on the CPAIS website:
[Running CPAIS with Windows 7](https://www.nfc.usda.gov/corporate/cpais/docs/Running_CPAIS_with_Windows_7.pdf) (https://www.nfc.usda.gov/corporate/cpais/docs/Running_CPAIS_with_Windows_7.pdf)
[CPAIS Access Issues and Solutions](https://www.nfc.usda.gov/corporate/cpais/CPAIS_Troubleshooting.pdf) (https://www.nfc.usda.gov/corporate/cpais/CPAIS_Troubleshooting.pdf)

Download and Install Java Runtime Environment (JRE)

JRE is a plug-in from the Oracle Corporation that is essential for running CPAIS forms and reports. JRE must be installed on your computer before you can use CPAIS. The applet can be downloaded from <https://java.com/en/download/>. For more information on downloading and installing the JRE please visit:

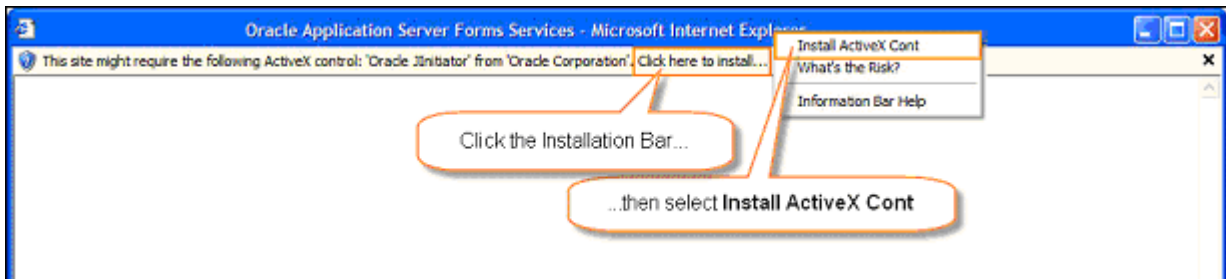
<http://www.oracle.com/technetwork/java/javase/install-windows-141940.html>

Note: USDA agencies may have different policies about installing software. If you do not have the necessary permissions to install this plug-in, please contact your local IT support staff.

1. Open a web browser and log on to the CPAIS.
2. From the CPAIS Main Menu, open the data entry form you want to run. The form will begin to launch in a new window. When CPAIS detects that you don't have JRE on your computer, it will pause and prompt you with a Security Warning.

Note: Windows 7 users first may need to acknowledge the message in the Internet Explorer installation bar in order to proceed.

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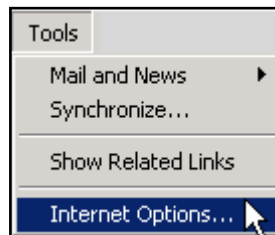


3. Click **Yes** (or **Run** for Windows 7). The JRE installation wizard will launch.
4. Windows 7 users may receive an additional security warning. Click **Install** and the JRE installation wizard will launch, as above. JRE will automatically begin installing.
5. At the confirmation message, click **OK** to complete the installation process.

Additional Web Browser Settings

For CPAIS to work smoothly, you should also make a few special changes to your web browser.

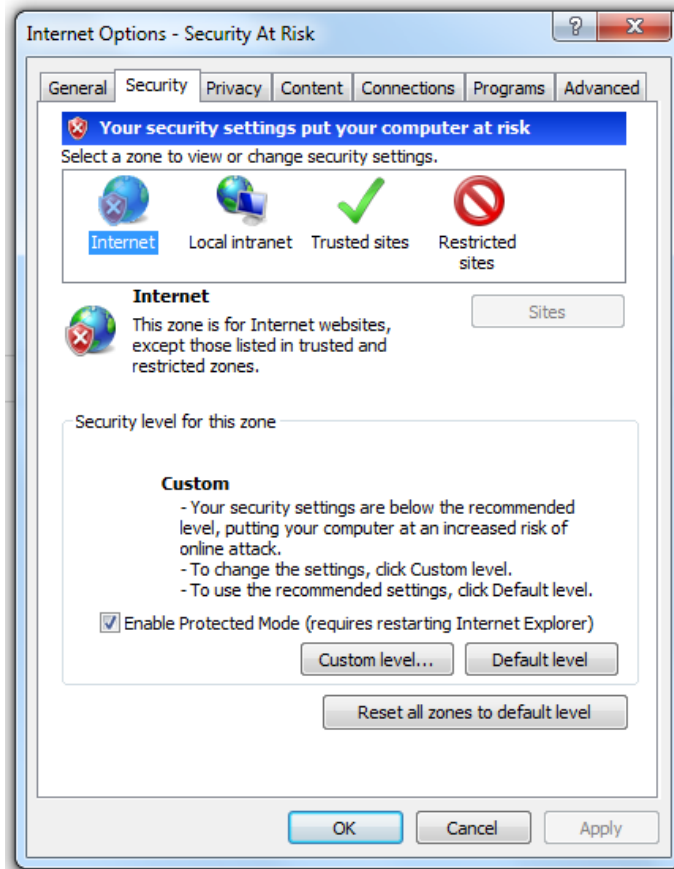
Launch Internet Explorer and from the Tools menu, select Internet Options. The Internet Options popup box will appear.



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Select the Security tab to access that page of the popup box.

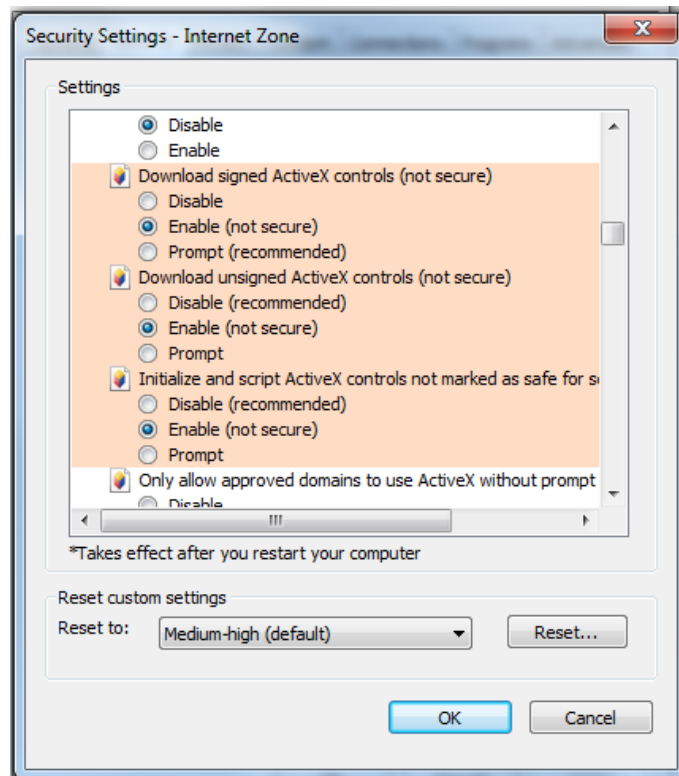
Then click the Custom Level button to open the Security Settings popup box.



Under the **ActiveX Controls and Plug-ins** section, set the following items to the state shown:

- Download Signed ActiveX Controls = **Enable**
- Download Unsigned ActiveX Controls = **Enable**
- Initialize and Script ActiveX Controls not Marked as Safe = **Prompt**
- Run ActiveX Controls and Plug-ins = **Enable**
- Script ActiveX Controls Marked Safe for Scripting = **Enable**

Click the OK button to close the Security Settings popup box. Then click the Apply/OK buttons to save your changes and exit the Internet Options box.



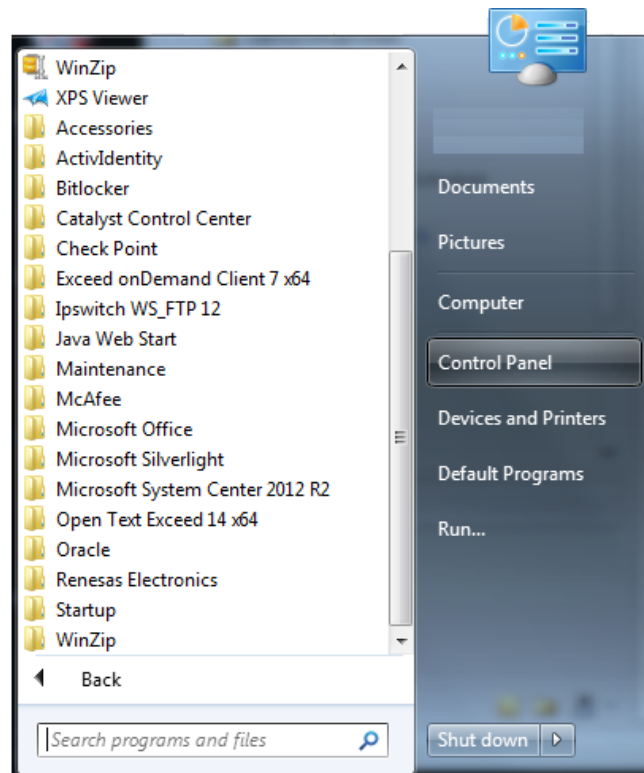
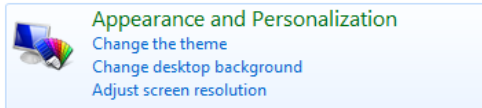
Screen/Monitor Resolution

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USDA computers may have a default screen resolution of 800 x 600 pixels. If you run a CPAIS form with this screen resolution, you may not see the entire form onscreen at once. This in no way impedes your ability to use CPAIS, it simply means that you must do some extra scrolling with your mouse in order to see all parts of the form. Follow the steps below to change your screen/monitor resolution so that the whole form is visible at once.

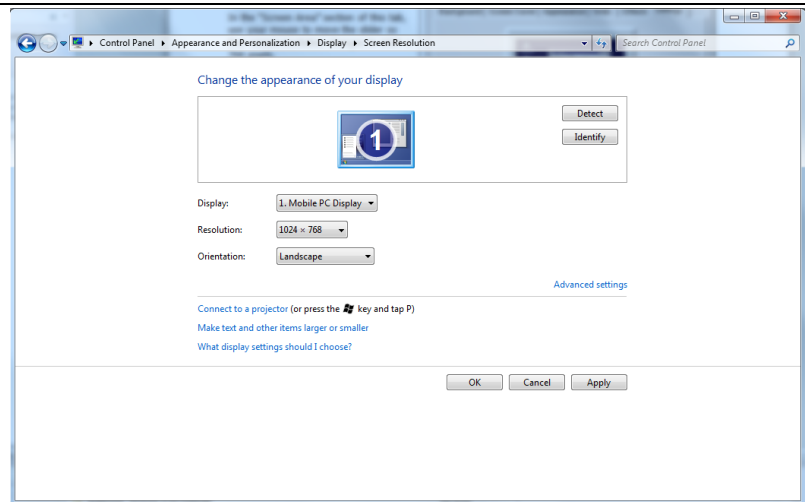
From your Windows Start button in the bottom-left corner of your screen, select **Start → Control Panel**.

When the Control Panel displays, click **Adjust screen resolution** in the **Appearance and Personalization** section to display the Screen Resolution Window.



When the Screen Resolution window appears, select the **Resolution** option, use your mouse to move the slider so that screen resolution changes to 1024 x 768 pixels.

Click the Apply/OK buttons to save this change and exit.



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Logon to CPAIS

Open Internet Explorer and navigate to https://cpais.ocfo.usda.gov/prd_rp/index.html.

. At the Warning page, read the message and then click **Continue**.



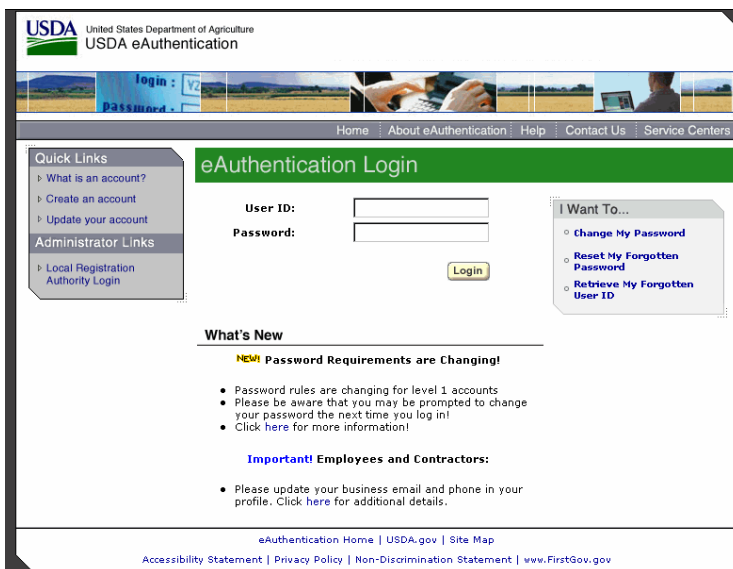
On the eAuthentication Warning page, read the message and click **Continue**.



At the login screen, enter your eAuthentication username and password and click **Login**.

If you want to change your password, click **Change My Password**.

If you have forgotten your eAuthentication User ID or password, click the corresponding links on this page.



If your login was successful, CPAIS displays the Main Menu. Selecting a topic from the navigation frame to the left will cause all forms, reports, and Discoverer reports available for that topic to display in the right frame. Click the name of the form, report, or user view to launch it.