

USDA FAIR Act Inventory Analysis & Reporting System

Federal
Activities
Inventory
Reform
Act of 1998

User's Guide



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*Office of the Chief Financial Officer
FAIR Act Inventory User Manual*

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Introduction

The goal of the Federal Activities Inventory Reform (FAIR) Act of 1998 system for the United States Department of the Agriculture is to provide mission areas, agencies and staff offices a means of reporting Full Time Equivalency (FTE) Inventories to the Office of Management and Budget (OMB). The FAIR Act requires the head of each executive agency submit to OMB, not later than the end of the third quarter of each fiscal year, a list of commercial activities performed by Federal Government sources. In recent years, OMB in its inventory data call has expanded the requirement to include an inventory of inherently governmental activities.

Sample information for an activity on the inventory list include the following:

- The fiscal year for which the activity first appeared on a list prepared under this section.
- The number of full-time employees (or its equivalent) that is necessary for the performance of the activity by a Federal Government source.
- The name of a Federal Government employee responsible for the activity from whom additional information about the activity may be obtained.

The USDA Inventory System is used to provide a process for identifying Federal Government commercial functions and for other purposes. The System's web enabled software and database is a data warehouse that is used to store current and historical FTE Inventories for the Department of Agriculture and to provide analysis reports for reviewing and validating the information.

Purpose of this User's Manual

This manual is designed to assist system users to effectively utilize the web-based Inventory application and its data entry and reporting capabilities.

System Overview

The USDA Inventory system is an Oracle-based, web-enabled application with the data repository (database) hosted by NITC behind the Departmental Offices firewall and the application server hosted on a Microsoft NT Server located behind the Intranet, the Agriculture-wide firewall.

All data is entered either by direct data entry using HTML forms or by the process of uploading text, word processing or spreadsheet documents.

System users may generate a variety of standard reports to review and verify the data entry process.

System Requirements

System users must be able to access the Department of Agriculture Intranet and have a standard browser installed on their PC Workstations. This browser must be Microsoft Internet Explorer version 5.5 or higher.

Prior to using the Inventory Reporting System, users must obtain a User ID and password by filling out the User Request Access form found at the end of this guidance. ***(Users previously approved have the same access as requested in FY 2003)***. The form must be submitted via e-mail to the Department's FAIR Act Systems Administrator, complete with supervisor approval. Upon receipt of the completed form, the systems administrator will have NITC set up the user account and notify the user when the account is available. If a user account already exists the password will remain unchanged but if the account is new the password will be the same as the user name but must be changed when the user logs in for the first time.

It is very important that the proper role classification be selected on the Access form. User roles are defined below. Each role has an access level that directly affects the capabilities of the user when using the Inventory System.

User Roles

- **System Administrator** - This role is reserved for use by the application systems administrator and the database administrators.
- **OCFO Supervisor** - This role is used by Office of The Chief Financial Officer personnel to manage and supervise mission areas, agencies, and staff offices FAIR Act Inventory submissions and to manage the user database. This role provides the ability to enter any findings that may require further detail.
- **OCFO Report** - This role provides read only access to Office of The Chief Financial Officer personnel and can report on any level of data within the Inventory System.
- **Mission Area/Agency/Staff Office Supervisor** - This role is used by the Mission Area/Agency/Staff Office Responsible Official and enables the user to lock the data entry process prior to data submission to the Office of The Chief Financial Officer. This role also provides the ability to read OCFO findings and provide appropriate responses.

- **Mission Area/Agency/Staff Office User** - This role enables the user to enter and edit all mission area/agency/staff office FTE Inventory information for the current year submission. This role also provides the ability to read OCFO findings and provide appropriate responses.
- **Mission Area/Agency/Staff Office Report** - This role is used by mission area/agency/staff office personnel and provides a read only capability to report on data and all levels of the users' mission area/agency/staff office.
- **Mission Area/Agency Organization User** - This role is used by mission area/agency personnel and enables the user to enter and edit FTE Inventory information for the current year submission for a specific organization with the user's mission area/agency. This organization is specified on the Application Access Request form.
- **Mission Area/Agency Organization Report** - This role is used by mission area/agency personnel and provides a read only capability to report on data for a specific organization within the users' mission area/agency. This organization is specified on the Application Access Request form.
- **Agency Sub-Organization User** - This role is used by agency personnel and enables the user to enter and edit FTE Inventory information for the current year submission for a specific organization/sub-organization with the user's agency. This organization/sub-organization is specified on the Application Access Request form.
- **Agency Sub-Organization Report** - This role is used by agency personnel and provides a read only capability to report on data for a specific organization & sub-organization within the users' agency. This organization & sub-organization is specified on the Application Access Request form.

Data Entry Screens

Upon logging into the FAIR Act System, the user is presented with a menu on the left side of the screen that is customized to the user's role privileges. The menu also contains Office of The Chief Financial Officer contact information. The person listed is the official point of contact for any questions concerning the FAIR Act System software. The right side of the screen displays the FAIR Act Home page that contains links to FAIR Act and Competitive Sourcing information. See figure 1 below for an example of menu and home page appearance.

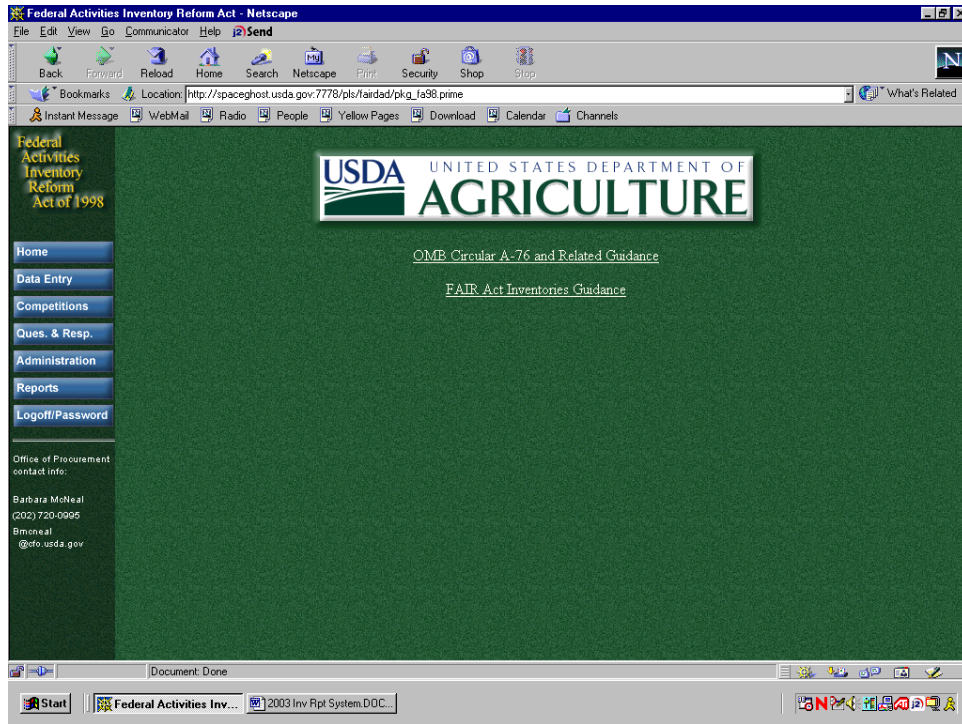


Figure 1 - FAIR Act Home Page

In order to enter or edit the FTE Inventory information the user will use the mouse to click on the 'Data Entry' menu button. The user will then be presented with a listing of their mission area/agency/staff office's current year inventory and historical (FY2003 and later) inventory for the entire department by mission area, agency, and staff office. The user must then click on either the current year to edit information or any mission area/agency/staff office and past year to view historical information. See figure 2 for an example of what a user from the Forest Service would see.

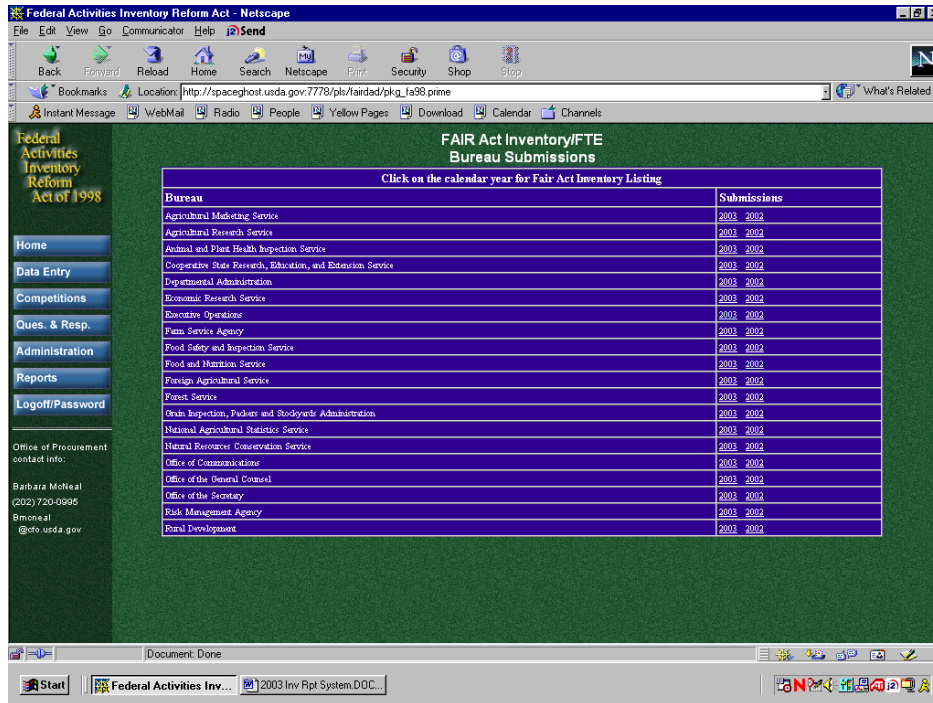


Figure 2 - Data Entry Inventory Selection Screen

When an inventory year is selected, a screen with the selected mission area/agency/staff office's inventory is displayed. The information on this main inventory selection screen is sorted so that all commercial activities will appear first followed by the 'Inherently Governmental' information. The information is sorted within these 2 categories by organization, sub-organization, activity function code, and city and reason code. No data may be changed on this screen. It is only used to display the specific mission area/agency/staff office information that the user is allowed to view. If the user is allowed to edit this information, an 'edit' button is displayed under the 'Action' column. If the user is not allowed to edit the current year information a 'lock' graphic is displayed instead. If the information is historical, the data may not be edited by anyone and the caption (hist) will appear under the 'Action' column. See figure 3 for an example of a screen that contains editable information. If the mouse cursor is placed over top of a column header, a short explanation of what the column contains will be displayed. Click the 'Edit' button to navigate to the data entry/edit screen.

Fair Act Inventory/FTE Listing

Commercial Listing

Bureau: 005 45: Department of Agriculture - Agricultural Marketing Service

Organization: AMS

Action	State	City	Country	Total FTEs	Fun. Code	Reason	1st Year on Inven	Year of Cost Comparison	CIV/ITE Savings	Est. Cost Comp. Savings	Year of MEO Review	Complete Y/N
Edit	WI	Abbotsford	US	1.00	A500	A						
Edit	TX	Alamo	US	1.00	A500	A						
Edit	NY	Albany	US	3.00	A500	A						
Edit	NM	Albuquerque	US	2.00	A500	A						
Edit	IA	Alden	US	1.00	A500	A						
Edit	MI	Allendale	US	1.00	A500	A						
Edit	WI	Allendale	US	1.00	A500	A						
Edit	TX	Amarillo	US	8.00	A500	A						
Edit	FL	Apopka	US	3.00	A500	A						
Edit	FL	Arcadia	US	3.00	A500	A						
Edit	TX	Arlington	US	1.00	A500	A						
Edit	WA	Arlington	US	1.00	A500	A						
Edit	IA	Arnolds Park	US	1.00	A500	A						
Edit	AL	Athens	US	1.00	A500	A						
Edit	GA	Atlanta	US	1.00	A500	A						
Edit	FL	Auburndale	US	13.00	A500	A						
Edit	CA	Avon	US	1.00	A500	A						
Edit	FL	Avon Park	US	2.00	A500	A						
Edit	MD	Baltimore	US	1.00	A500	A						
Edit	WI	Baraboo	US	1.00	A500	A						
Edit	FL	Barrow	US	3.00	A500	A						
Edit	KY	Beaver Dam	US	1.00	A500	A						
Edit	WA	Bellevue	US	1.00	A500	A						
Edit	MD	Beltsville	US	5.00	A500	A						
Edit	AL	Boaz	US	7.00	A500	A						
Edit	IN	Boone	US	6.00	A500	A						

Figure 3 - Display of editable data

If a new record is to be entered, click on the 'Add Inventory' button in the upper left corner of the screen. See figure 4 for an example of the Inventory Data Entry screen. Once all data entry is complete, the 'Update Record' button is clicked on and the information will be saved. Once the information is saved, the user will return to the main inventory screen to select any additional records to be edited. The record that was just modified or entered will be highlighted in light yellow to show the user which record was just edited.

Fair Act Inventory Data Entry

Agency: 005: Department of Agriculture Bureau: 45: Agricultural Marketing Service

Organization Code: AMS [LOV](#)

Sub-Organization Code: [LOV](#)

City or Location: Year 1st appeared on inventory:

State: WI - Wisconsin Responsible Official Name:

Country: US Responsible Official Phone:

FTE: 1 Responsible Official Email:

Function Code: A500 [LOV](#) Reimbursable FTE:

Reason Code: A [LOV](#)

Reason Code Justification: (Justification required for all reason codes except 'B')

Update Record Delete Record Reset to Original Cancel/Return

Figure 4 - Inventory Data Entry/Edit Screen

The 'Delete' button will remove the record from the mission area, agency, or staff office 's inventory. The 'Reset' button will cause the data to revert to its initial values as when the screen was first displayed. The 'Cancel' button will return the user to the main inventory listing.

Please refer to the OMB suggested guidelines to determine what values should be entered in the data entry fields.

Special Data Entry Conditions

Inherently Governmental

To designate an inventory record status as an Inherently Governmental vs. Commercial, a Reason Code of 'Z' must be selected. This reason code will only appear on the data entry screens and will not be visible on any reports or transmitted to the OMB.

Sensitive or Classified Location

In order enter inventory data where the actual location of the FTE is considered to be sensitive or classified, enter the words 'Not Disclosed' in the City/Location and leave the State and Country blank.

Competition Studies

To designate a record as being considered or under consideration for a competition study, click on the 'Compete Y/N' on the main inventory-listing screen. This will mark the record so that it will appear on the 'Compete Study' listing for further detailed editing.

Competition Study Screens

In order to edit the Competition Study information the user must use the mouse to click on the 'Compete Study' menu button. The user will then be presented with a listing of their mission area/agency/staff office 's current year studies and previous year studies for the entire department. The user must then click on either the current year to edit information or any mission area/agency/staff office and past year to view historical information. The screen that shows the mission area/agency/staff offices and years is similar to the Data Entry selection screen shown in figure 2.

Once the year has been clicked on, all studies for that year will be displayed and the user must then select which record to edit. The display is a two-line

display with the top row of column headers representing the 1st row and the bottom row of column headers representing the 2nd row. If the user has editing capabilities, an 'edit' button will appear under the 'Action' column. If it is a past year study, the word '(hist)' will be displayed and if the submission has been frozen by the mission area/agency/staff office supervisor, a 'lock' icon will appear. See figure 5 for an example of the Competition Status Listing.

Fair Act Inventory/Competition Status Listing
 Bureau: 005 55: Department of Agriculture - Rural Development

Organization: RD

Sub-Organization: RBS

Action	City	State	Country	Total FTEs	Activity Fen Code	Reason	Reason Sub Code	Year of Cost Comparison	CIV/FTE Savings	Est. Cost Comp. Savings	Year of MEO Review	Responsible Official
	Status Code		Status Comment		Total Cost/Status Savings/Date		Estimated Completion Date		Actual Completion Date			
[Edit]	Washington	DC		2.00	VB15							
[Edit]	Washington	DC		2.00	VB20							

Sub-Organization: RHS

Action	City	State	Country	Total FTEs	Activity Fen Code	Reason	Reason Sub Code	Year of Cost Comparison	CIV/FTE Savings	Est. Cost Comp. Savings	Year of MEO Review	Responsible Official
	Status Code		Status Comment		Total Cost/Status Savings/Date		Estimated Completion Date		Actual Completion Date			
[Edit]	Washington	DC		1.00	D200							
[Edit]	St. Louis	MO		90.00	D502							
[Edit]	St. Louis	MO		50.00	D704							
[Edit]	St. Louis	MO		260.00	S703							
[Edit]	Washington	DC		1.00	S703							
[Edit]	Washington	DC		1.00	T820							

Figure 5 - Competition Study Inventory Listing

Clicking on the 'Edit' button will cause the study edit screen to be displayed with all data loaded into the editable fields. The top half of the screen contains all of the standard FTE Inventory information while the bottom half contains all of the Competition Study information. In order to complete a study, either fill in the actual completion date or set the status to 'Complete'. If the status is set to Complete and the Actual Completion Date is blank then the system date will be used as the Completion Date. If the Actual Completion Date is set and it is earlier than the system date then the status will automatically be set to 'Complete'. See figure 6 for an example of the Competition Study data entry screen.

Federal Activities Inventory Reform Act - Netscape

File Edit View Go Communicator Help Send

Back Forward Reload Home Search Netscape Print Security Shop Stop

Bookmarks Location: http://spaceghost.usda.gov:7778/pls/airdad/pkg_fa38.prime

Instant Message WebMail Radio People Yellow Pages Download Calendar Channels

Federal Activities Inventory Reform Act of 1998

Home
Data Entry
Competitions
Ques. & Resp.
Administration
Reports
Logoff/Password

Office of Procurement contact info:
Barbara McNeal
(202) 720-0995
Bmoneal@ofc.usda.gov

Fair Act Inventory - Data Entry

Agency: 005: Department of Agriculture Bureau: 55: Rural Development

Org Code: RD
Sub-Org Code: RBS

City or Location: Washington Responsible Official Name:
State: DC Responsible Official Phone:
Country: Responsible Official Email:
FTE: 2.00
Function Code: Y815
Reason Code: B
Reason Code Justification:

Competition Study Fields

Year of Cost Comparison: [] Estimated Annual Cost Savings: []
Estimated Completion Date: [] Total Cost Savings: []
Actual Completion Date: [] FTE Savings: []
Post MEO Performance Review Date: [] Status Code: []

Awarded To: Private Industry Retained In-House

Comment: []

Update Record Reset to Original Cancel/Return

Document: Done

Start Federal Activities Inv... R1 Dated 4/28/2003 2003...

Figure 6 - Competition Study Data Entry

Once all data entry is complete, the 'Update Record' button is clicked on and the information will be saved. Once the information is saved, the user will return to the main Competition Study screen to select any additional records to be edited. The record that was just modified will be highlighted in light yellow to show the user which record was just edited.

The 'Reset' button will cause the data to revert to its initial values. The 'Cancel' button will return the user to the main Competition Study Listing. Please refer to the Office of The Chief Financial Officer suggested guidelines to determine what values should be entered in the data entry fields.

Findings & Responses

If for any reason, the Office of The Chief Financial Officer finds an inconsistency or problem with a mission area/agency/staff office's FAIR Act data submission, they may enter this as a 'Finding' in the Inventory System. This finding will address a specific issue concerning the data submission and there will be a different finding for each issue. In order to justify or explain about this issue, the bureau will enter an appropriate 'Response' to each finding. The text may be entered directly in the data entry field or may be cut and pasted from another application such as a word processing document or a spreadsheet. If desired, the actual document or spreadsheet may be uploaded directly into the Inventory System. This system

functionality replaces the current method of communicating through multiple E-mail documents and stores this information for historical purposes.

Figure 7 represents a view that a mission area/agency/staff office administrator or user might see when a finding has been issued for their bureau.

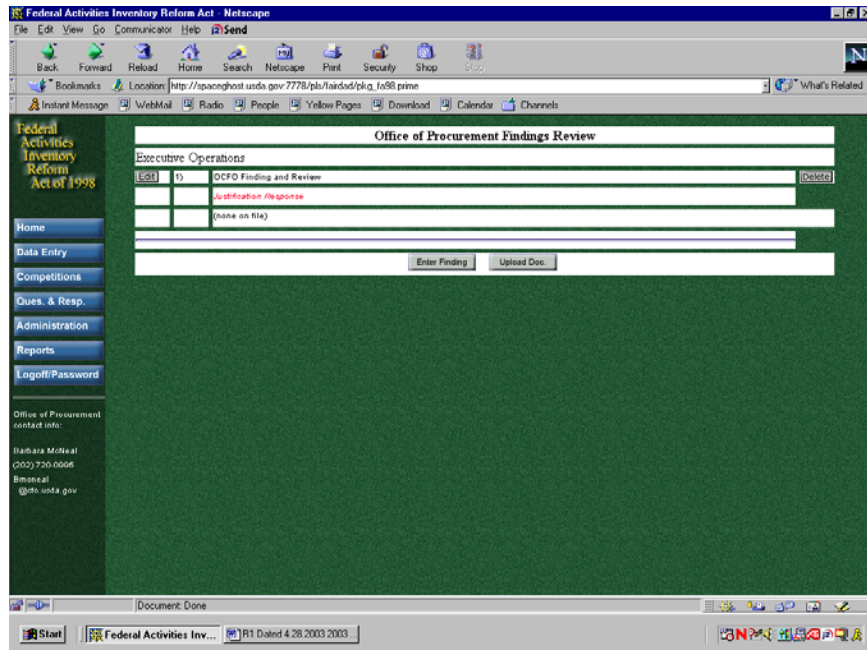


Figure 7 - Bureau View of Findings

Figure 8 is a sample of the screen that allows text to be entered in response to a finding. Again, the text may be typed or pasted in from another application.

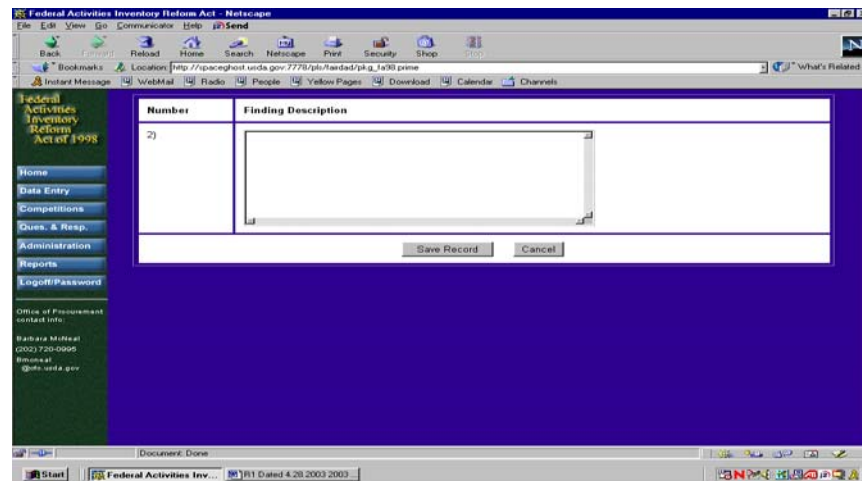


Figure 8 - Justification Response Text Entry

Figure 9 shows the 'Upload' screen where a user may choose to upload an entire word processing document or spreadsheet. By clicking on the 'Browse' button, a standard Windows® 'Choose File' window is opened and the user may navigate to any directory on their workstation or network drive.

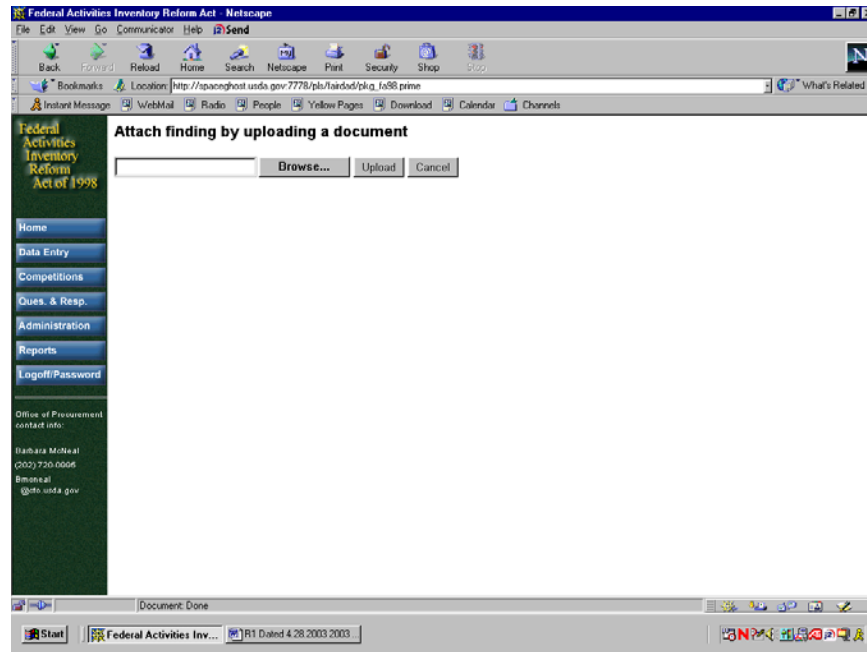


Figure 9 - Justification Response Upload Document

Standard text will appear on the screen while an uploaded document will be represented by a hyperlink. Clicking on this hyperlink will cause the document to be opened in a browser window for reading only. If any changes need to be made to the document, the original must be deleted from the Inventory System and the corrected version must then be uploaded.

Administration

The mission area/agency/staff office supervisor has certain administrative privileges that enable them to 'lock' the data so that no further updating may be done by 'promoting' the data to the 'mission area/agency/staff office data review' status. This enables the mission area/agency/staff office supervisor to run a procedure that validates the bureau's data and determine if it is viable to be submitted to the Office of The Chief Financial Officer.

The Mission Area/Agency/Staff Office Supervisor may also edit their mission area/agency/staff office's contact information. These are the Primary and Secondary contacts for the mission area/agency/staff office and they are responsible for fielding any questions or concerns about the Inventory data.

The menu option for 'Administration' will appear on the left-hand side of the screen when the Mission Area/Agency/Staff Office Supervisor logs in.

Validation

When an Agency Organizational or Sub-Organizational user logs in, their menu options are slightly different. These users have no administrative privileges so the 'Validation' button appears on their menu. This button, when clicked on, runs the same validation routine as the Mission Area/Agency Supervisor but for their level of data access only. This means that an organizational user will validate data for their organization only. If there are errors in the data, the user may click on the 'edit' button on the validation results report and be taken directly to the offending record.

Logging Out

For security purposes, it is suggested that the user log out of the Inventory System if they are going to be away from their desks for an extended period of time or they are not going to be using the application any longer. Closing the browser will cause the user to be logged out or the Log/Password button may be clicked followed by the Log Out button. This will de-authenticate the user and free up the database session. In order to use the Inventory System again, the user will have to log back in.

Changing Passwords

When the user is first assigned an Oracle account for the Inventory System, the default password is the same as the User ID. This most often is the users' last name followed by their first initial. Since this ID must be unique, it may be necessary to use additional letters of the user's name to create a unique ID. If the user already has an Oracle account because of access to other NITC software systems, then their password will not be set to their User ID but will remain as it currently is. Once access has been provided to the Inventory System and the User ID is a new Oracle user then upon logging in for the first time, the user must select a new password. This function is provided automatically upon logging in.

The capability of changing a personal password at any time is provided by clicking on the 'Log/Password' button followed by the 'Change Password' button.

A password must be at least 4 characters long. It is not case sensitive.

USDA FAIR Act Inventory System	
Access Request Form	
Mission Area/Agency:	
User ID:	
User Name:	
User Type:	
Phone Number:	
E-mail Address:	
Organization Code:	
Sub-Organization Code:	
User Signature/ Date	Supervisor's Signature/Date
Submit completed form to:	Julie Klein USDA - OCFO 1400 Independence Avenue, SW South Building, Room 3407A Washington, DC 20250