

USDA Conference Management System (AgCMS) User Guide

**April 2021
Version 2.0**



Office of the Chief Financial Officer (OCFO)

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I. AgCMS User Management

A. Roles/Functions

The three agency roles are **Submitter**, **Approver**, and **Agency Point of Contact (POC)**. There is also a fourth role that is designated to Super Users from the **Office of the Chief Financial Officer (OCFO)**.

1. The **Submitter** enters and submits conference requests.
2. The **Approver** reviews and approves or rejects submitted conference requests. In most cases this user is part of agency management. Certain approval thresholds require [approval authorities](#).
3. The **Agency POC** manages AgCMS for the agency. This user oversees user accounts, setting up routing lists, creating annual plans and initiating the annual plan approval process, submitting and approving conference requests on behalf of submitters and approvers, respectively.
4. The **OCFO Super User** has the ability to set-up OCFO level approval, approve POC level access requests, and approve conferences and conference names.

Key System Users	
<p style="text-align: center;"><u>Submitter</u></p> <p style="text-align: center;">User responsible for creating standard conference requests</p>	<p style="text-align: center;"><u>Approver</u></p> <p style="text-align: center;">User responsible for approving conference requests and annual conference at the agency and sub-agency level</p>
<p style="text-align: center;"><u>Agency Point of Contact</u></p> <p style="text-align: center;">Agency level “Super Users” responsible for approving user requests, creating sub-agencies, conference names, annual plans, as well as approval authority on conference requests</p>	<p style="text-align: center;"><u>OCFO</u></p> <p style="text-align: center;">Application level “Super Users” with ability to set up OCFO level approval, approve POC level access requests and authority to approve conferences, conference names and annual plans</p>

5. The system allows for a single user to have multiple roles – e.g., a submitter can be an approver, and vice versa; however, except for special cases (e.g., limited staff), it is recommended that users have distinct roles. POCs can fill in on most of the submitters and approvers’ functions to allow for a seamless conference approval process. POCs who need to be official approvers may add themselves on the applicable routing lists.

B. User Registration

1. The AgCMS homepage is located at <http://agcmsportal.force.com/agcmsportal>.
2. Users who have access will click on **Go to AgCMS** on the homepage. The user will be redirected to the USDA eAuth website (<https://www.cert.eauth.usda.gov/home/>) and login with their USDA credentials.
3. Users who do not have access to the system will need to fill out the **Form below to request access to AgCMS**.
4. Users will fill out their **First Name, Last Name, Email Address, Phone Number, Agency, and Access Request Type**.

Conference Management System

If you have access, navigate to AgCMS using the button below.

[Go to AgCMS](#)

Fill out the form below to request access to AgCMS.

First Name

Last Name

Email Address

Phone Number

Agency

Access Request Type

[Submit Access Request](#)

5. For the **Agency** and **Access Request Type** fields, users will select the appropriate values from the drop down menus.

USDA
Conference Management System

If you have access, navigate to AgCMS using the button below.

[Go to AgCMS](#)

Fill out the form below to request access to AgCMS.

First Name

Last Name

Email Address

Phone Number

Agency

Access Request Type

[Submit Access Request](#)

USDA
Conference Management System

If you have access, navigate to AgCMS using the button below.

Go to AgCMS

Fill out the form below to request access to AgCMS.

First Name
Last Name
Email Address
Phone Number
Agency
Search Accounts...
Access Request Type
-None-
-None-
Conference Submitter
Conference Approver
Agency POC
OCFO

- After completing the form, users will click on the **Submit Access Request Button** and receive the email below that the request has been submitted and is pending approval.

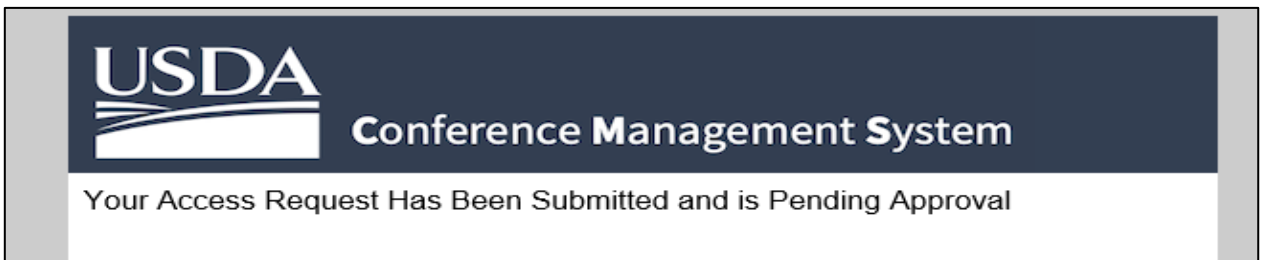
USDA
Conference Management System

If you have access, navigate to AgCMS using the button below.

Go to AgCMS

Fill out the form below to request access to AgCMS.

First Name
John
Last Name
Doe
Email Address
john.doe@usda.com
Phone Number
XXX-XX-XXXX
Agency
FSA
Access Request Type
Conference Submitter
Submit Access Request



- Once the access request has been submitted, the Agency POC and OCFO will also receive an email of the pending access request. If the agency does not have an assigned Agency POC, the OCFO will have the ability to review the pending access request (*example screenshot below*) and **approve** or **deny** the access request.

POC User Management - Pending User Approvals									
First Name	Last Name	Email	Phone Number	Agency	Access Type	Grant Access	Deny Access		
Melissa	Utah	✉ mderricott@deloitte.co...	(804) 123-1234	NASS	Conference Submitter	Approve	Deny		
Hannah	Gram	✉ email@email.com	222-222-2222	FSA	Conference Approver	Approve	Deny		
Mike	Gram	✉ mderricott@deloitte.co...	222-222-2222	FSA	Conference Submitter	Approve	Deny		
Test	Test External	✉ mderricott@deloitte.co...	222-222-2222	FSA	Conference Approver	Approve	Deny		
Melissa	Derricott	✉ email22@email.com	(111) 111-1111	FSA	Conference Submitter	Approve	Deny		
Melissa	Derricott	✉ mderricott@deloitte.co...	222-222-2222	FSA	Conference Submitter	Approve	Deny		
John	Smith2	✉ sukankipati@deloitte.c...	232 232 3343	FSA	Conference Submitter	Approve	Deny		

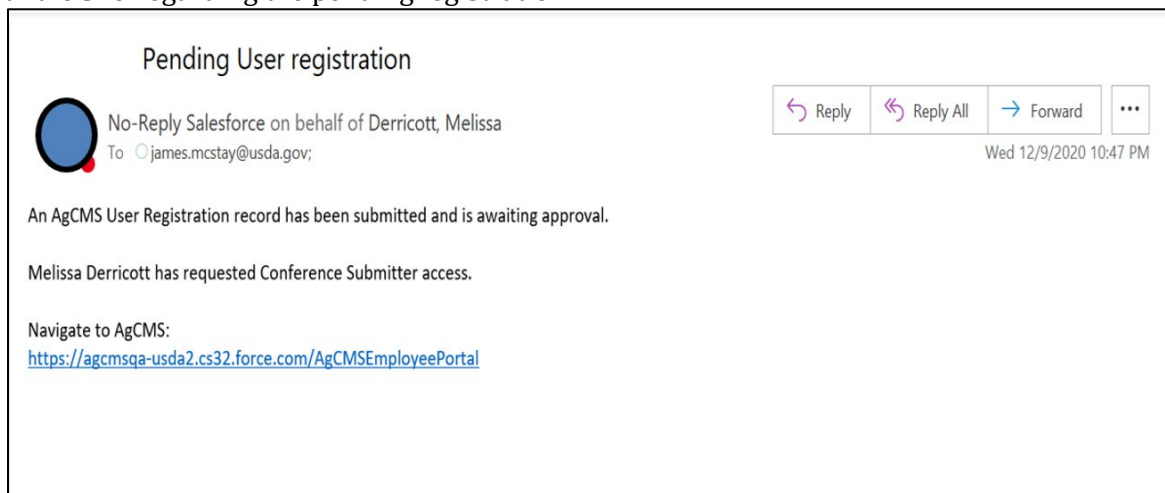
8. Once the Agency POC has been approved by the OCFO, they will manage all user registrations for their agencies moving forward (OCFO will assist as needed).

C. Approve/Grant User Access (Agency POC/OCFO)

Users can gain access to the system in two ways. One is to submit a user access request and for it to be approved. The other is for an Agency POC or OCFO to grant access for a specific user through their home page.

1. Approve User Access Request

- a. Designated agency staff should register by submitting a user access request in AgCMS. Upon submission, the system sends a notification email (*sample below*) to the Agency POC and OCFO regarding the pending registration.



- b. The Agency POC or OCFO will log into the system to review the pending user access request. In addition to being notified of pending access requests via email, the users will also see their pending access user requests on their homepage dashboard in AgCMS.

POC User Management - Pending User Approvals							
First Name	Last Name	Agency	Access Type	Grant Access	Deny Access		
Melissa	Utah	NASS	Conference Submitter	Approve	Deny		
UAT	POC	FS	Conference Submitter	Approve	Deny		
Hannah	Gram	FSA	Conference Approver	Approve	Deny		
Mike	Gram	FSA	Conference Submitter	Approve	Deny		
Test	Test External	FSA	Conference Approver	Approve	Deny		
Melissa	Derricott	FSA	Conference Submitter	Approve	Deny		
Melissa	Derricott	FSA	Conference Submitter	Approve	Deny		
John	Smith2	FSA	Conference Submitter	Approve	Deny		
UAT	Submitter	FSA	Agency POC	Approve	Deny		

- c. Click on **Approve** or **Deny**, as appropriate. The user requesting access will also receive a notification of the decision.

2. Grant User Access (Agency POC)

- a. The Agency POC can register a user to the site by clicking on **Grant Additional Access** in

the **Select an Action Drop-Down Menu** on their homepage.

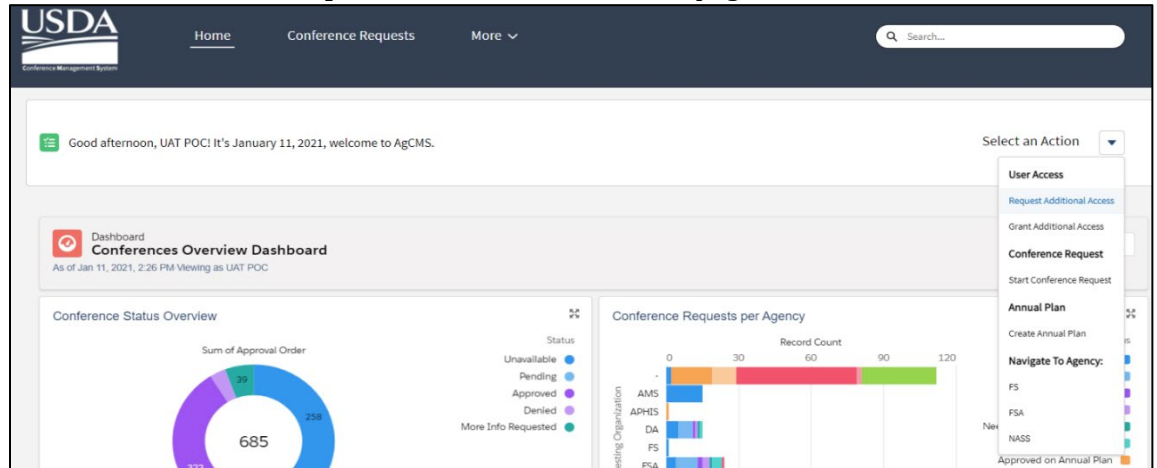


Figure 1: AgCMS POC Dashboard

- b. After selecting **Grant Additional Access**, the Agency POC will enter the employee's information in the **Grant User Access** form below.

The 'Grant User Access' form contains the following fields and values:

- Agency:** RD
- First Name:** Albert
- Last Name:** White
- Email:** awhite@usda.com
- Phone Number:** 232-232-2322
- Access Type:** Agency POC

Buttons at the bottom include 'Close' and 'Grant Access'.

Note: You may select a current AgCMS user to prepopulate the values in the form. If there is not an appropriate current AgCMS user to select, the form must be completed manually.

- c. After completing the User Access Information (**Agency, First Name, Last Name, Email,**

Phone Number, and Access Type) click on **Grant Access**.

- d. A successful submit message will appear, which indicates that the employee can now access the system. An email notification will be then sent to the user stating that they have access.



Note: Agency POCs can only grant access for agencies they have Agency POC access for.

D. Manage Agency Users (Agency POC/OCFO)

1. From the AgCMS homepage click on the **Select an Action drop down menu** (see: Figure 2: AgCMS POC Dashboard). Within **Navigate to Agency** you will only see the agencies that you have access. Select the agency to navigate to that agency.

Note: On the agency page you will view only data you have access for. For example, only POCs can manage users for their agency.

2. After you select the agency, you will be routed to that agency's page. On the page, select the **Manage Active Users** tab. This tab lists all active registered users for this agency.

A screenshot of a web application interface showing the "Manage Active Users" tab. The interface has a navigation bar with tabs: "Agency Details", "Manage Approvers", "Manage Active Users" (selected), and "Related List". Below the navigation bar is a table with the following columns: "First Name", "Last Name", "Email", "Phone Number", "Status", "Access Type", and "Remove". The table contains 10 rows of user data. Each row has a "Remove" icon (a circle with a minus sign) at the end. The data in the table is as follows:

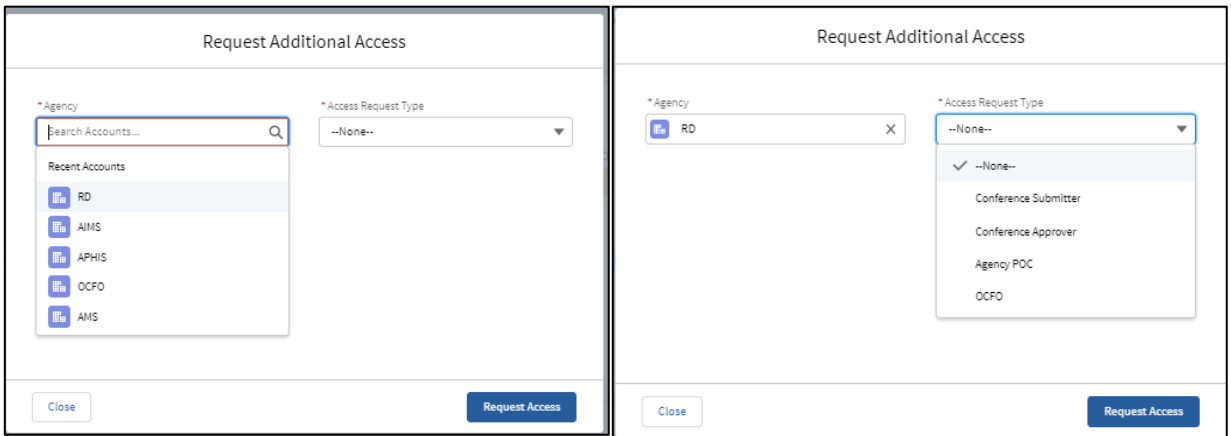
First Name	Last Name	Email	Phone Number	Status	Access Type	Remove
End2End	Approver1	yelovic@deloit...		Access Granted	Conference Subm...	⊖
Michael	Farrelly	mfarrelly@del...	(999) 999-9999	Access Granted	Agency POC	⊖
Ollie	OCFO	yelovic@deloit...	123456789	Access Granted	Conference Appro...	⊖
RD	POC	yelovic@deloit...	1234135	Access Granted	Agency POC	⊖
Approver	s	yelovic@deloit...	245262452	Access Granted	Conference Appro...	⊖
Yair	Elovic	yelovic@deloit...		Access Granted	Conference Appro...	⊖
eAuth	Submitter	m11farrelly@g...	(111) 111-1111	Access Granted	Conference Subm...	⊖
Suresh	Submitter	sukankipati@d...		Access Granted	Conference Subm...	⊖
Sarah	Mosley	mghorashi@d...	876-888-8888	Access Granted	Agency POC	⊖
End2End	POC	yelovic@deloit...	(123) 456-7890	Access Granted	Conference Appro...	⊖

Figure 2: Manage Agency Active Users

3. If you want to remove access for a user on the agency, click on the **Remove icon** located at the end of the row for the applicable user. Additional viewable data points on this page are the user's **Access Type, Access Status, Email, and Phone Number** (see: Figure 3: Manage Agency Active Users).

E. Request Additional Access (OCFO, POCs, Approvers, Submitters)

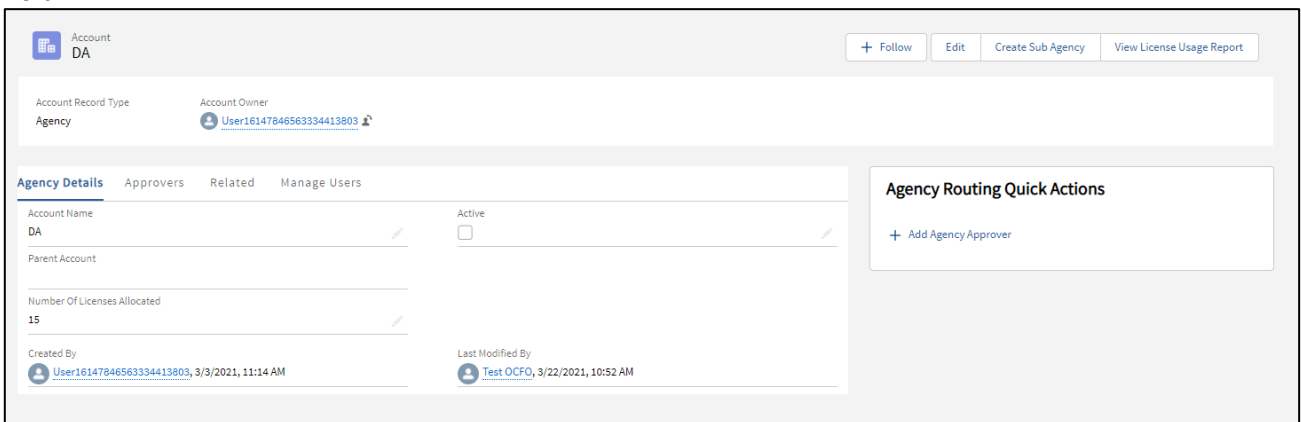
1. All Users can request additional access role to other agencies by clicking on **Request Additional Access** in the **Select an Action Drop-Down Menu** on their homepage (see: Figure 2: AgCMS POC Dashboard).
2. On the **Request Additional Access** screen below, users will select the **Agency** they need additional access to and select the **Access Request Type** in the pre-populated drop-down menus.



3. Once the Agency and Access Request Type have been selected, the user will click on **Request Access** and a success message will appear. This indicates that the additional access request for the user has been created. POCs and OCFOs receive all user access requests in the form of email notifications.

F. Manage License Limits (OCFO)

1. All agencies within AgCMS have a set number of user licenses assigned to them. The number of licenses allotted per Agency is listed in the **Number of Licenses Allowed** field on the Agency's record page. OCFO user's are able to edit this field while Agency POC's are only able to view this field.



2. Users can view two reports that deal with user license limits: Agency and Overall License Usage Reports.
 - a. Agency License Usage Report
 - This report can be accessed by selecting the **View License Usage Report** on the Agency page.
 - This will display all users who have the current Agency as their home agency and the total number of available licenses for this agency.

Report: Contacts with Accounts
License Usage Report

Total Records
8

Account Name: Account Name ↑	Number of Licenses Allotted Vs Usage ↑	Full Name	Email	Last Login
DA (8)	15 (8)	Test Apporver 1	james.mcstay@usda.gov	3/19/2021, 10:41 AM
		Test DepSec	james.mcstay@usda.gov	3/10/2021, 12:17 PM
		Test Submitter 1	james.mcstay@usda.gov	3/19/2021, 10:46 AM
		Test Submitter 2	james.mcstay@usda.gov	3/10/2021, 12:15 PM
		Test POC	james.mcstay@usda.gov	3/19/2021, 1:30 PM
		Test SATO	james.mcstay@usda.gov	3/10/2021, 12:16 PM
		Test Approver 2	james.mcstay@usda.gov	3/11/2021, 4:59 PM
		Test UnderSec	james.mcstay@usda.gov	3/10/2021, 12:17 PM
Subtotal				
Subtotal				
Total (8)				

Row Counts Detail Rows Subtotals Grand Total

b. Overall License Usage Report (Agency POC/OCFO)

- This report can be accessed by selecting the **Reports** tab on the dashboard, the **All Folders** tab, the **AgCMS OCFO/POC Reports** folder, and then **License Usage Report**.
- This report displays all AgCMS users grouped by their home agencies.

Report: Contacts with Accounts
License Usage Report

Total Records
73

Account Name: Account Name ↑	Number of Licenses Allotted Vs Usage ↑	Full Name	Email	Last Login
DA (8)	15 (8)	Test Apporver 1	james.mcstay@usda.gov	3/19/2021, 10:41 AM
		Test DepSec	james.mcstay@usda.gov	3/10/2021, 12:17 PM
		Test Submitter 1	james.mcstay@usda.gov	3/19/2021, 10:46 AM
		Test Submitter 2	james.mcstay@usda.gov	3/10/2021, 12:15 PM
		Test POC	james.mcstay@usda.gov	3/19/2021, 1:30 PM
		Test SATO	james.mcstay@usda.gov	3/10/2021, 12:16 PM

II. Routing Lists

A. Create a New Agency - USDA Level Approvers (OCFO)

1. Users with access to the OCFO agency, either as OCFO or Agency POC are able to create USDA level routing. OCFO Routing will apply to all USDA conference requests that are above 450k.
2. All Agency Annual plans will be routed through OCFO Level approvers, only after the Agency has approved their agency's plan.
3. If, an Agency does not exist, OCFO can create a New Agency by logging in to AgCMS and selecting the **Agencies** tab on their homepage.

The screenshot shows the USDA AgCMS dashboard. The navigation menu at the top includes 'Home', 'Conference Requests', 'Annual Plans', 'Agencies', and 'More'. The 'Agencies' tab is highlighted with a red arrow. Below the navigation, there is a welcome message and a '2020 Conferences Overview Dashboard'. The dashboard features two main charts: a 'Conference Status Overview' donut chart showing a total of 384 requests, and a 'Conference Requests per Sub Agency' horizontal bar chart. A 'Select an Action' dropdown menu is open, displaying various options including 'User Access', 'Conference Request', and 'Annual Plan'.

4. After selecting the Agencies tab click on the **New** button displayed at the top of the page. Select **Agency** and then **Next** to create a new Agency.

The screenshot shows the 'Agencies' page in the USDA AgCMS system. The 'New' button at the top right is highlighted with a red arrow. Below the 'New' button, there is a search bar and a table of existing agencies. A 'New Account' modal dialog is open, allowing the user to select a record type. The 'Agency' option is selected, and the 'Next' button is visible at the bottom of the modal.

5. Complete the **New Account: Agency Form**.
6. Enter Name of the **Agency** in the **Account Name** field and select the **Agency Routing is Active** checkbox.

Note: This is part of a future enhancement; no functionality is currently linked to this field.

7. **Parent Agency** should be blank when creating an Agency. This is part of a future enhancement; no functionality is currently linked to this field.
8. Click **Save**.
9. OCFO Approvers will automatically display on the Manage Approvers tab for all agencies. OCFO approvers are managed by OCFO users. OCFO approvers can only be added or removed from the OCFO Agency record.

Approver	Type	Conference Request Approval Or...	Annual Plan Approval Order
Barbara Harris	Secondary	1	Deputy CFO Review
Barbara Harris	Secondary	1	Deputy Secretary Review
UAT Approver1	Primary	1	OCFO Preparation

10. To become an approver on a routing list the user must have Conference Approver access for the Agency. Agency POCs can grant access to any user as a POC, Agency Submitter, or Agency Approver.

B. Create Agency Level Routing list

1. The routing list is the order of approvers through which conference requests will route: A submitter completes and submits the request and approvers – from first to last – review and

decide in succession.

2. The August 2020 Deputy Secretary memo, "USDA Conference and Travel Management," outlines the conference approval thresholds and requirements.

Threshold Value	Required Approver
>\$450,000	USDA Deputy Secretary
\$75,000 - \$449,999	General Officers / Under Secretaries
\$40,000 - \$74,999	Agency/Staff Office Head or Senior Accountable Travel Official (SATO)
\$0 - \$39,999	Agency/Staff Office Head, SATO, or Delegated Authority

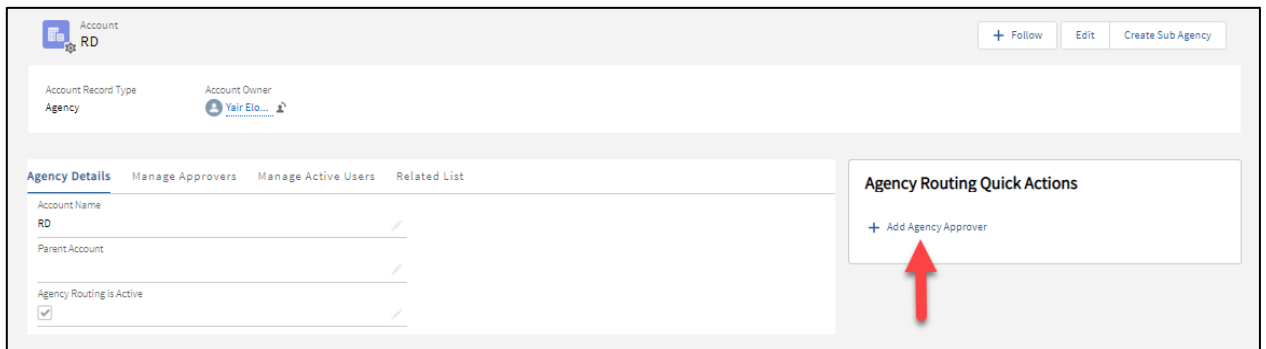
3. Based on current requirements, conferences will be routed for approval as follows:
 - a. Conference requests between **\$0-\$39,999** will be routed through the Sub Agency Approvers (up to the Delegated Authority, as applicable) and optionally Agency/Staff Office Head or SATO.

***Note:** POC will have the option to select whether to include the Agency/ Staff Office Head or SATO for the conference request between **\$0-\$39,999**.*

- b. Conference requests between **\$40,000-\$74,999** will be routed through the Sub Agency Approvers and the Agency/Staff Office Head or SATO.
 - c. Conference requests between **\$75,000 – \$449,999** will be routed through the Sub Agency Approvers, Agency/Staff Office Head or SATO and Under Secretary/General Officer.
 - d. Conference Request **over \$450,000** will be routed through the Sub Agency Approvers, Agency/Staff Office Head or SATO Under Secretary/General Officer, and Deputy Secretary

***Note:** Events with net expenses at or **over \$450,000** require a Secretarial waiver. These requests will be routed through OCFO for approval.*

4. The following approvers are set up at the agency level: Agency/Staff Office Head, SATO, and Under Secretary/General Officer. To create a **New Agency Level Routing List**, the Agency POC must first have access to the Agency. Users can see the list of agencies they have access to from the home screen under the **Navigate to Agency** section under the **Select and Action menu** (see: Figure 2: AgCMS POC Dashboard).
5. Click on **Add Agency Approver** on the Agency Routing Quick Actions section.



6. Complete the **Add a New Agency Approver** form referenced below.
 - a. The **Agency** field is pre-populated with a selection and it is read-only.
 - b. Select **Approver Type**, options are SATO Approver, Agency Head Approver, Under Secretary Approver
 - c. Select the **Reviewer**

*(**Note:** Only users with Agency Approver role for the agency and who have logged into AgCMS will be in the Reviewer drop down. Users who are assigned to approvers can be seen on the Manage Active Users Tab, if the user is not there they will not show up under reviewer)*

- d. Select the **Type** (If this approver will be the Primary or Secondary). The secondary approver can approve/deny conference requests in the absence of the primary.

Note: The steps remain the same for adding **SATO, Agency Head** and **Under Secretary Approvers** on the Agency Level Routing List. Agency level approver will be set up only once and will apply to all the sub agency requests based on their threshold.

Agency Routing Quick Actions

+ Add Agency Approver

Add A New Agency Approver

* Agency

AMS ▼

* Approver Type

Select an Approver Type ▼

* Reviewer

Select a Reviewer... ▼

* Type

Select an approver type ▼

Close
Create Agency Approver

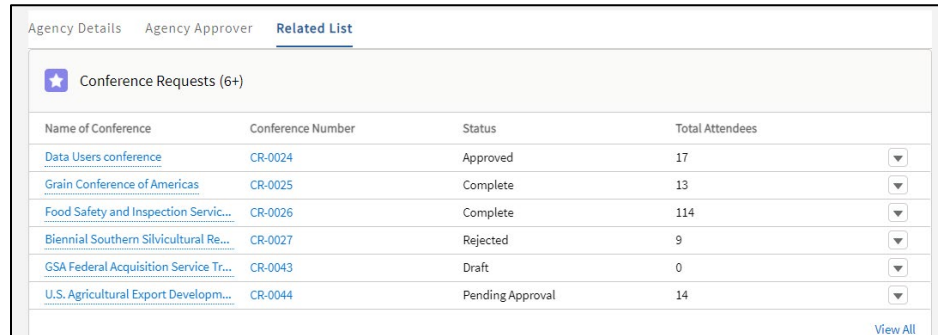
7. Once the approver has been created, the approver will display on the **Agency Approvers list**. You may need to refresh the page to display the approvers, once created.

Agency Approvers			
Approver	Type	Approver Type	Remove
End2End Approver2	Primary	Under Secretary Approver	-
SATO_APPROVER_TEST_Role	Primary	SATO Approver	-
Agency Head	Primary	Agency Head Approver	-
UNDER_SECRETARY_PRIMARY_TES...	Primary	Under Secretary Approver	-

OCFO Approvers			
Approver	Type	Conference Request Approval Or...	Annual Plan Approval Order
OCFO Prep	Primary	1	OCFO Preparation
DepSec	Primary	1	Deputy Secretary Review
DepCFO	Primary	1	Deputy CFO Review

C. Create a Sub Agency

1. A “Sub Agency” is an office, division or unit within an agency through which conferences will route for approval. An agency can have as many sub agencies as needed – each with its own set of approvers – based on the agency’s conference routing and approval requirements. Some agencies may have a sub agency for each state office, for example, while others may have a more consolidated approach that corresponds to fewer sub agencies.
2. Before you may create a sub agency, please navigate to a sub agency record first. To navigate to a sub agency:
 - a. On the Home page, either **Search** for the agency in the global search or click on an agency in the **Navigate to an Agency section**, from the **Select an Action menu** on the Home page (see: *Figure 2: AgCMS POC Dashboard*).
 - b. Once at the Agency, click on **Related List tab** to view the Sub Agencies.



The screenshot shows the 'Related List' tab for an agency. It displays a table of conference requests with columns for Name of Conference, Conference Number, Status, and Total Attendees. There are 6+ requests listed.

Name of Conference	Conference Number	Status	Total Attendees
Data Users conference	CR-0024	Approved	17
Grain Conference of Americas	CR-0025	Complete	13
Food Safety and Inspection Servic...	CR-0026	Complete	114
Biennial Southern Silvicultural Re...	CR-0027	Rejected	9
GSA Federal Acquisition Service Tr...	CR-0043	Draft	0
U.S. Agricultural Export Developm...	CR-0044	Pending Approval	14

3. From the Agency record page, click on the **Create Sub Agency** button.



4. Complete the **Create Sub Agency** Form referenced below.
 - a. Enter Name of the Sub Agency in the **Account Name** Field.
 - b. **Parent Account** will be pre-populated with read-only access.
 - c. Enter the **Number of Approval Orders** (*a minimum of one*) that will be assigned for this Sub Agency’s routing list.
 - d. Select **Include SATO/Agency Head Under 40K** if conference requests below \$39,999 need to get routed through the Agency Head /SATO level.

Note: Select this option if your agency is required to get approval at the SATO/Agency Head level for the conference below \$39,999. All conferences above will be automatically routed through the SATO/Agency head level.

- e. Click on the **Save** button.

Create Sub Agency

<p>*Account Name <input style="width: 90%;" type="text"/></p> <p>Number of Approval Orders <input style="width: 90%;" type="text"/></p>	<p>Parent Account RD</p> <p>Include SATO/Agency Head Under 40K <input type="checkbox"/></p>
---	---

Cancel
Save

Note: Sub Agency has Active Routing List is a mandatory field and it can be activated only when agency approvers are added as defined in the Number of Approval Orders.

Agency Details
Agency Approver
Related List

Account Name Business Center Operations Office	Parent Account RD
Number of Approval Orders 3	Sub Agency Has Active Routing List? <input type="checkbox"/>
Include SATO/Agency Head Under 40K <input checked="" type="checkbox"/>	Parent Agency RD

D. Create a Sub Agency Level Routing List

1. To create a new sub agency level routing list, a POC will need to navigate to the sub agency and use the **Agency Routing Quick Actions** section. Agency POCs can add or modify the agency level approver list, using the Agency Approver Tab.
2. Click on **Add Sub Agency Approver**.

Account

Business Center Operations Office

Account Record Type
Sub Agency

Parent Agency
RD

Sub Agency Has Active Routing List?

Number of Approval Orders
3

Account Owner
Yair Elo...

+ Follow

Edit

Agency Details
Agency Approver
Related List

Account Name Business Center Operations Office	Parent Account RD
Number of Approval Orders 3	Sub Agency Has Active Routing List? <input type="checkbox"/>
Include SATO/Agency Head Under 40K <input checked="" type="checkbox"/>	Parent Agency RD

Agency Routing Quick Actions

+ Add Sub Agency Approver

3. Complete the **Add a New Sub Agency Approver** form referenced below.
 - a. The **Sub Agency** field is prepopulated with a selection and it is limited to read-only.
 - b. Select **Sub Agency Approval Order** number.

Note: The Sub Agency Approval Order drop-down consists of as many levels as the Number of Approval Order(s) entered during the Sub Agency creation. Select the level being assigned to the approver, i.e., "1" if the approver is first on the routing list, "2" if second, etc.

* Sub Agency Approval Order

Select a Sub Agency Approval Order

1

2

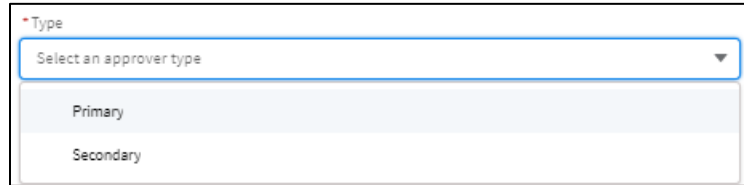
3

Page | 16

- c. Select the **Reviewer**.

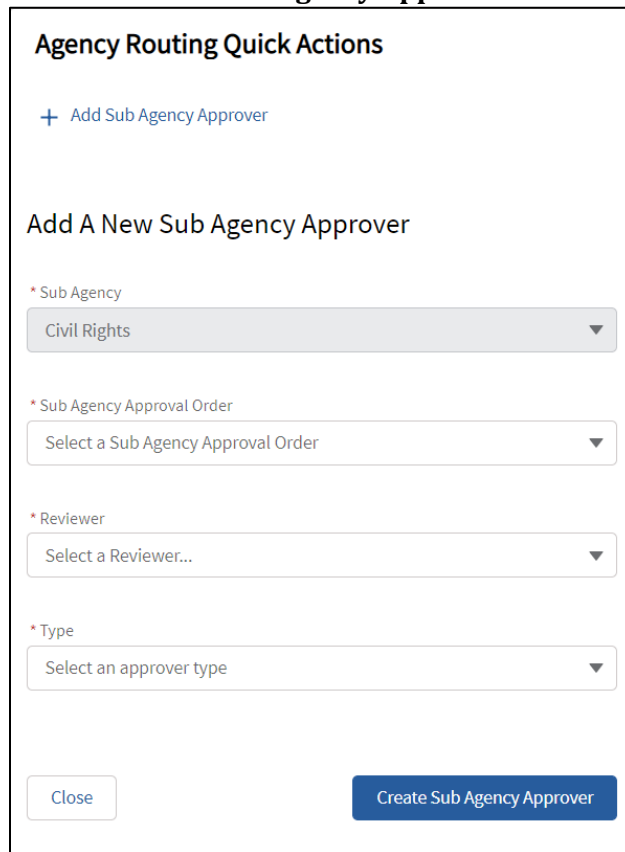
***Note:** Select the user that will be assigned at this level in the Reviewer field. The dropdown consists of all registered users that have **Conference Approver** access to the Agency.*

- d. Select **Type**, select if this approver will be the primary or secondary at this level in the **Type** field. The secondary approver can approve/deny conference requests in the absence of the primary



A screenshot of a dropdown menu titled '* Type'. The menu is open, showing two options: 'Primary' and 'Secondary'. The text 'Select an approver type' is visible in the dropdown header.

- e. Click on the **Add Sub Agency Approver**.



A screenshot of a form titled 'Agency Routing Quick Actions'. Below the title is a '+ Add Sub Agency Approver' button. The main section is 'Add A New Sub Agency Approver' and contains four dropdown menus: '* Sub Agency' (set to 'Civil Rights'), '* Sub Agency Approval Order' (set to 'Select a Sub Agency Approval Order'), '* Reviewer' (set to 'Select a Reviewer...'), and '* Type' (set to 'Select an approver type'). At the bottom are 'Close' and 'Create Sub Agency Approver' buttons.

***Note:** Sub agency can be activated only when all agency approvers are added as defined in the **Number of Approval Orders**.*

Agency Approvers				
Approver	Approval Order	Type	Approver Type	Remove
End2End Approver1	1	Primary	Sub Agency Approver	⊖
End2End Approver2	2	Primary	Sub Agency Approver	⊖
Yair Elovic	3	Primary	Sub Agency Approver	⊖

- Once there is at least one approver at each Approval Order, the system will automatically activate the Sub Agency and change the **Sub Agency Has Active Routing List** field to have a value of true

Note: An error will populate if you try to activate it without approvers as a routing list cannot be active without a user designated for every level of the approval orders.

E. Update an Existing Routing List

- On the POC Home page, click on **Select an Action** and then select the Agency you want to update an existing routing list under the **Navigate to Agency** section (see: Figure 2: AgCMS POC Dashboard)
- On the Agency Details page, go to Manage Approvers Tab.** To remove access from an Approver from the Routing list, click on the **Remove** button on the confirmation box that appears.

Note: This will remove the approver from any active approval processes. Additionally, the system will not allow you to remove an approver from a routing list when they are the only approver at that level. For example, if there is only one agency head and they are being taken off the routing list, the POC will need to add another user as agency head before the system will allow the first user to be removed.

Agency Approvers				
Approver	Type	Approver Type	Remove	
End2End Approver2	Primary	Under Secretary Approver	⊖	
SATO_APPROVER_TEST_Role	Primary	SATO Approver	⊖	
Agency Head	Primary	Agency Head Approver	⊖	
UNDER_SECRETARY_PRIMARY_TES...	Primary	Under Secretary Approver	⊖	

F. Manage Sub Agencies Details (Agency POC)

- Navigate to the **Related List** Tab in the Agency and then the **Sub Agencies** Section. The list of sub agencies appears. Sub agencies can be edited by selecting the **Edit drop-down box** and then **clicking Save.** (see screenshot on next page)

Agency Details Manage Approvers Manage Active Users **Related List**

Sub Agencies (6+)

Account Name	Sub Agency Has Active Routing List?	Number of Approval Orders	
Alabama	<input checked="" type="checkbox"/>	1	▼
Alaska	<input type="checkbox"/>		▼
Arizona	<input type="checkbox"/>		▼
Arkansas	<input type="checkbox"/>		▼
Business Center Operations Office	<input type="checkbox"/>	3	▼
California	<input type="checkbox"/>		▼

[View All](#)

Edit Business Center Operations Office

***Account Name**

Number of Approval Orders

Include SATO/Agency Head Under 40K

Parent Account

Sub Agency Has Active Routing List?

Parent Agency

2. **On the Sub Agency Details page, go to Approvers Tab.** To remove access from an Approver from the Routing list, click on the **Remove** button on the confirmation box that appears.

Agency Details **Approvers** Related

Agency Approvers

Approver	Approval Order	Type	Approver Type	E.	R.
Test Approver 1	1	Primary	Sub Agency Approver		
Test Approver 2	1	Secondary	Sub Agency Approver		

Note: This will remove the approver from any active approval processes. Additionally, the system will not allow you to remove an approver from a routing list when they are the only approver at that level. For example, if there is only one agency head and they are being taken off the routing list, the POC will need to add another user as agency head before the system will allow the first user to be removed.

Users are able to remove excess approvers that are listed at a number higher than the **Number of Approval Orders** field without having to deactivate the Sub Agency record. If the Number of Approval Orders field is 5 and the user selects the Removal button on an approver listed at Approval Order 6, the system will allow this action.

3. Additionally, on the **Approvers Tab**, Agency POC can select the **Paper and Pencil icon** under the **Edit column** to edit the Approver's **Approver Order** or **Approver Type**.

Edit Approver Level

Reviewer
Test Approver 1 ▼

Approver Order
1 ▼

Type
Primary ▼

Close Edit

Note: Users are able to edit information about an Approver as long as there is another approver listed at that level. For example, if there is an active routing list on the Sub Agency and there are 2 Approval Orders. If there is only one approver listed at Approval Order 1, the Agency POC will be unable to edit the Approval Order from 1 to 2 for this user.

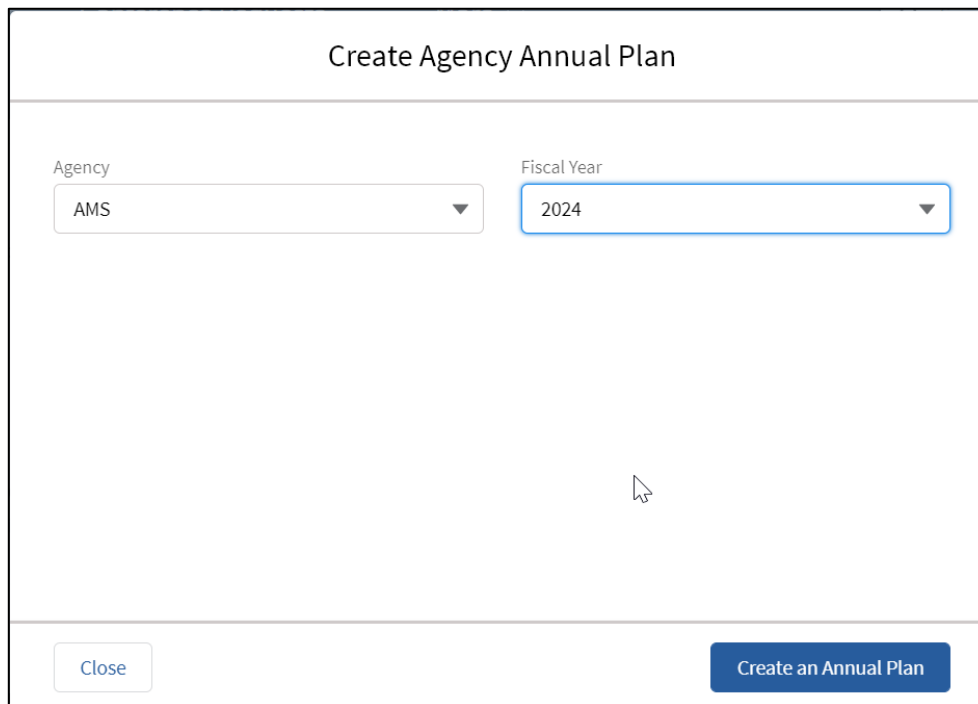
III. Annual Plan

Note: Annual conference plans are due to OCFO by August 31.

A. Add a New Plan

1. To add a new plan as a POC or OCFO user role, navigate to the home page, click on the **Select an Action drop-down menu** and then click on **Create Annual Plan** (see: Figure 2: AgCMS POC Dashboard).
2. Select the **Agency** and **Fiscal Year** and click on the **Create New Annual Plan** button. This action is to create an Agency annual plan.

Note: The system will not allow a user to create multiple annual plans per agency per year, an error will show if this occurs, and the annual plan will not be saved. Additionally, the USDA plan is created when the first agency user creates an annual plan for that fiscal year. OCFO office will never have to create an annual plan.

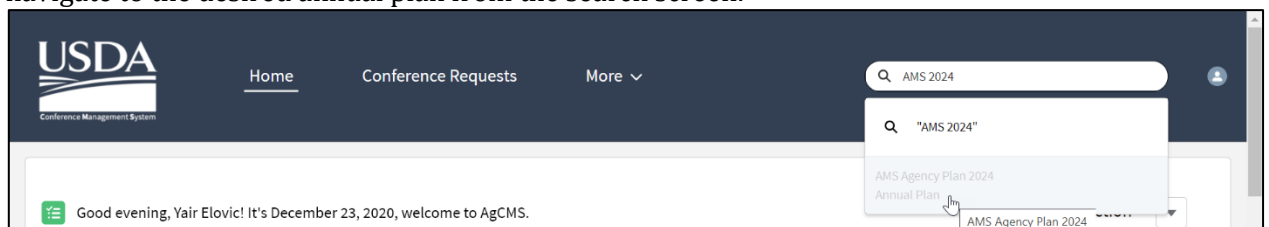


The screenshot shows a web form titled "Create Agency Annual Plan". It contains two dropdown menus: "Agency" with "AMS" selected and "Fiscal Year" with "2024" selected. At the bottom left is a "Close" button, and at the bottom right is a blue "Create an Annual Plan" button.

B. Navigate to Annual Plans

There are three ways to navigate to annual plans: the global search, the annual plan component (available to Agency POCs), and the Annual Plan List Views.

1. **Global Search** - To navigate to an annual plan through **Global Search**, enter the Agency name, the fiscal year, or agency name and fiscal year in the search box on the upper right-hand corner, and navigate to the desired annual plan from the search screen.



2. **Annual Plan component located on the home screen** - On the POC home screen there is a component which lists all annual plans that were created by the user, and by clicking on the annual

plan link on that screen, a user can navigate to the desired annual plan. This component will display annual plans for all years with the most recent at top.

Annual Plan	Status	Fiscal Year
AMS - 2023 - Annual Plan	Developing Plan	2023
AMS - 2022 - Annual Plan	Developing Plan	2022
RMA - 2021 - Annual Plan	Developing Plan	2021
AMS - 2020 - Annual Plan	Developing Plan	2020
RMA - 2020 - Annual Plan	Developing Plan	2020

- Annual Plan List View** - On the top of the page, a user can navigate to annual plans by clicking on the **Annual Plan menu item** and then choosing the **list view** they prefer to use to find the annual plan.

Annual Plan	Status
All Annual Plans	Developing Plan
My Annual Plans	Developing Plan
Recently Viewed (Pinned list)	Developing Plan
USDA Level Annual Plans	Developing Plan
<input type="checkbox"/> AP-0017	Developing Plan
<input type="checkbox"/> AP-0018	Annual Plans in Progress
<input type="checkbox"/> AP-0020	Annual Plans in Progress
<input type="checkbox"/> APHS Agency Plan 2029	Developing Plan

C. View Annual Plan Page

On the annual plan page there are several components supporting the creation and approval of annual plans.

- There are two levels of Annual plans:
 - Agency Annual Plan** – The Agency Annual Plan is managed by the Agency POC and approved at the Agency Head, SATO and Under Secretary level. POCs can create and attach conference annual plans to annual plans at the agency level.
 - USDA Level Annual Plan** –The USDA Level Annual Plan is managed and approved by the OCFO. Conference requests approved at the Agency level will roll up to the USDA level.
- Items on the Annual Plan Page:
 - Create Annual Conference Button**– This button can be used to add a conference to an annual plan manually.
 - View Annual Conferences Report Button**– This button on the Agency Annual Plan page takes the user to a report that displays the Conference Names that are involved in this Annual Plan. A user can export the report once they are on the report page.

Report: Conference Requests with Annual Plan
Agency Annual Conferences

Conference Name ↑	Event Type	Sponsor, Host or Attend	City	State	Country	Number of Attendees
Access and Functional Needs Preparedness Planning for Rural Communities Tr	Training	Host	Atlanta	Georgia	United States of America	3,488
Acquisitions Fundamentals of Project And Program Management Training	Conference	Host	Denver	Colorado	United States of America	345
Administrative Training	Conference	Host	DC	District of Columbia	United States of America	432
Administrator Award Ceremony	Training	Host	Austin	Texas	United States of America	234
Adobe MAX Creativity Conference	Conference	Attend	Orlando	Florida	United States of America	34
Advanced CPA-52 Training	Training	Host	Sacramento	California	United States of America	423
Agricultural Extension Outlook Conference	Conference	Sponsor	Wilmington	Connecticut	United States of America	123
Conference on Statistical Practice Conference	Training	Attend	Little Rock	Arkansas	United States of America	211

- c. **View FY Annual Conferences Report Button**– This button on the USDA Annual Plan page takes the user to a report that displays the Conference Names that are involved in this Annual Plan. A user can export the report once they are on the report page.

Report: Conference Requests with Annual Plan
USDA FY Annual Conferences

Annual Plan: Annual Plan Name ↑	Conference Name ↑	Event Type	Sponsor, Host or Attend	City	State
AMS Agency Plan 2026	Access and Functional Needs Preparedness Planning for Rural Communities ...	Training	Host	Atlanta	Georgia
	Acquisitions Fundamentals of Project And Program Management Training	Conference	Host	Denver	Colorado
	Administrative Training	Conference	Host	DC	District of Columbia
	Administrator Award Ceremony	Training	Host	Austin	Texas
	Adobe MAX Creativity Conference	Conference	Attend	Orlando	Florida
	Advanced CPA-52 Training	Training	Host	Sacramento	California
	Agricultural Extension Outlook Conference	Conference	Sponsor	Wilmington	Connecticut

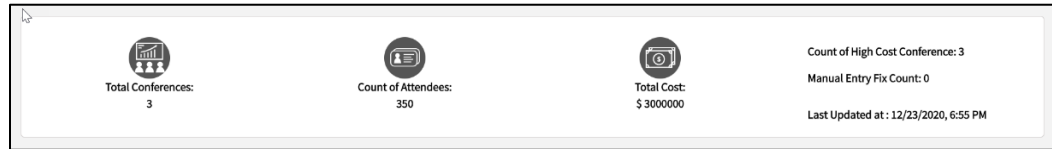
Reset Annual Plan Approval– This button allows only an OCFO user to move the Annual Plan back in the approval process to the status of **Developing Plan**. The functionality was created so that edits or additions could be made to an Annual Plan that was either in the status of **Pending Dep Sec Approval** or **Approved**. Once this button has been selected, the approval process will need to start over. Annual Plans that are tied to a USDA Annual Plan that has a status of **Approved** are not able to have their approval processes reset.

- d. **Compact Layout**– The compact layout is located at the top of the page and displays fields from the Annual Plan record.
- e. **Status Chevron**– The chevron displays the current status of the annual plan. Statuses are; Developing Plan, SATO Approval, Agency Head Approval, Undersecretary Approval, Pending Dep Sec Approval, and Approved.
- f. **Annual Plan Approval Component**– Before approval starts this component will show the submit for approval button.


*Note: Once the **Submit for Approval button** has been clicked, no users will be allowed to add conference request to the annual plan. After clicking the **Submit for Approval button**, the approval component will show either the current status of the annual plan to viewers that are not on the routing list, or approval decisions for users on the Available Approvers list, for more information on this topic see the annual plan approval process section below.*

- g. **Annual Plan Overview**– This component will display the overview information of the annual plan such as total conferences, count of attendees for the year, total cost, count of high-cost conferences, number of conferences that require manual fix entry and the last updated date. Note: conference requests on the error list or removed from the plan will not aggregate into the totals on this component.
- **Total Conferences:** Displays the number of conferences on the Annual plan.
 - **Count of Attendees:** Displays the total count of all attendees from all annual conferences

- **Total Cost:** Displays the Total cost of all Annual Conferences under the Annual Plan
- **Count of High-Cost Conference:** Displays high-cost conference (**Note: High-cost conference is calculated as cost per person exceeds \$3,000 or cost per person per day exceeds \$600**)
- **Manual Entry Fix:** Displays number of Conferences that are has errors while creation/upload. These conferences can be resolved on the Manual Entry Fix tab.
- **Last Updated at:** Displays Date and time of most recent update on the Annual Plan.



- h. **Annual Plan Tabs**– Please see the next section to understand what information is held on each tab.
- i. **List of Annual Conferences**– This component displays all associated Conference Requests with this Annual Plan (*see screenshot on next page*)



[Home](#)
[Conference Requests](#)
[Annual Plan](#)
[More](#)

Annual Plan

NASS - 2017 - Annual Plan

[+ Follow](#)
[Reset Annual Plan Approval](#)
[Create Annual Conference](#)
[View Annual Conferences Report](#)

Agency: **NASS**

Status: **Developing Plan**

USDA Annual Plan: **USDA Plan 2017**

USDA Plan Status: **Annual Plans in Progress**

Fiscal Year: **2017**

Developing Plan

SATO Approval


Agency Head Approval

Undersecretary Approval


Pending Dep Sec Approval

Approved


[Submit Plan for Approval](#)



Total Conferences:
54



Count of Attendees:
109484



Total Cost:
\$308,567,760.00

Count of High Cost Conference: 29

Manual Entry Fix Count: 0

Last Updated at : 3/23/2021, 11:31 AM

Details

Approval History

Upload Annual Conference

Manual Entry Fix

Attachments

Chatter

Annual Plan Name
NASS Agency Plan 2017

Agency
NASS

Created By
Melissa Derricott, 3/23/2021, 10:54 AM

Fiscal Year
2017

USDA Annual Plan
USDA Plan 2017

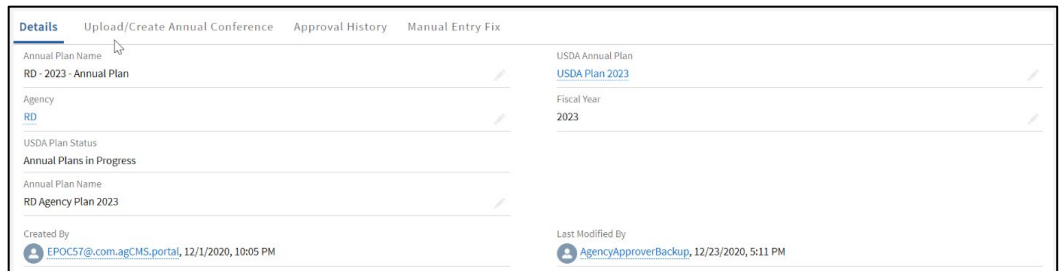
USDA Plan Status
Annual Plans in Progress

Last Modified By
Melissa Derricott, 3/23/2021, 10:57 AM

	Conferenc...	Conferenc...	Start Date	End Date	Number of...	Total Esti...	Conferenc...	Sponsor, H...	Status	Remove
1	CR-12682	Vegetable and F...	Jan 23, 2021	Jan 23, 2021	432	\$33,445.00	Operational	Sponsor	On Annual Plan	
2	CR-12681	Access and Fun...	Jan 22, 2021	Jan 23, 2021	343	\$4,444.00	Training	Host	On Annual Plan	
3	CR-12680	Advanced CPA...	Jan 20, 2021	Jan 30, 2021	423	\$230,000.00	Training	Host	On Annual Plan	
4	CR-12679	Mile High Agile ...	Nov 23, 2020	Nov 24, 2020	334	\$32,234,54...	Training	Sponsor	On Annual Plan	
5	CR-12678	Adobe MAX Cre...	Nov 30, 2020	Dec 31, 2020	34	\$223,443.00	Conference	Attend	On Annual Plan	
6	CR-12677	Administrator A...	Nov 10, 2021	Nov 13, 2021	23,422	\$321,234.00	Training	Host	On Annual Plan	
7	CR-12676	Administrative ...	Oct 30, 2020	Nov 10, 2020	432	\$2,224,455...	Conference	Host	On Annual Plan	
8	CR-12675	Agricultural Ext...	Oct 30, 2020	Nov 10, 2020	123	\$5,432,212...	Conference	Sponsor	On Annual Plan	
9	CR-12674	Acquisitions Fu...	Oct 20, 2020	Nov 10, 2020	345	\$20,221,33...	Conference	Host	On Annual Plan	
10	CR-12673	Conference on ...	Sep 22, 2020	Sep 25, 2020	211	\$233,333.00	Training	Attend	On Annual Plan	
11	CR-12672	Conference on ...	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000...	Conference	Sponsor	On Annual Plan	
12	CR-12671	Certified Scrum...	Jan 23, 2021	Jan 23, 2021	432	\$33,445.00	Operational	Sponsor	On Annual Plan	
13	CR-12670	Access and Fun...	Jan 22, 2021	Jan 23, 2021	343	\$4,444.00	Training	Host	On Annual Plan	
14	CR-12669	Advanced CPA...	Jan 20, 2021	Jan 30, 2021	423	\$230,000.00	Training	Host	On Annual Plan	
15	CR-12668	Agri-Mark Coop...	Nov 23, 2020	Nov 24, 2020	334	\$32,234,54...	Training	Sponsor	On Annual Plan	
16	CR-12667	Adobe MAX Cre...	Nov 30, 2020	Dec 31, 2020	34	\$223,443.00	Conference	Attend	On Annual Plan	
17	CR-12666	Administrator A...	Nov 10, 2021	Nov 13, 2021	23,422	\$321,234.00	Training	Host	On Annual Plan	
18	CR-12665	Administrative ...	Oct 30, 2020	Nov 10, 2020	432	\$2,224,455...	Conference	Host	Removed By Ag...	
19	CR-12664	Agricultural Ext...	Oct 30, 2020	Nov 10, 2020	123	\$5,432,212...	Conference	Sponsor	On Annual Plan	
20	CR-12663	Acquisitions Fu...	Oct 20, 2020	Nov 10, 2020	345	\$20,221,33...	Conference	Host	On Annual Plan	
21	CR-12662	Conference on ...	Sep 22, 2020	Sep 25, 2020	211	\$233,333.00	Training	Attend	On Annual Plan	

j. Annual Plan Tabs (cont.) – Please see the next section to understand what information is held on each tab.

- **Details** – This tab holds all annual plan specific details.



- **Upload/Create Annual Conference** – this screen is where users can upload new annual plans for more information on this refer to the create annual conferences section. Once an agency annual plan is moved away from Developing plan status, this section will be disabled.

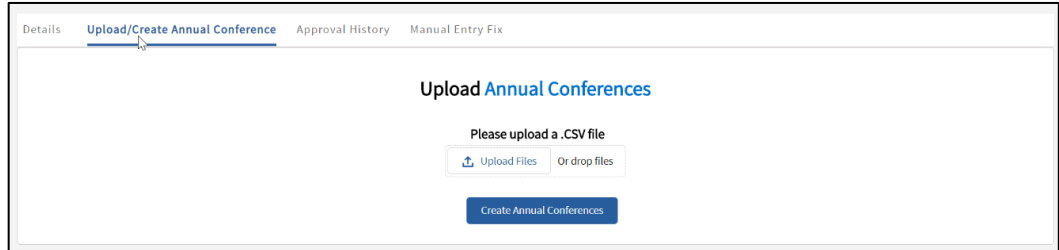
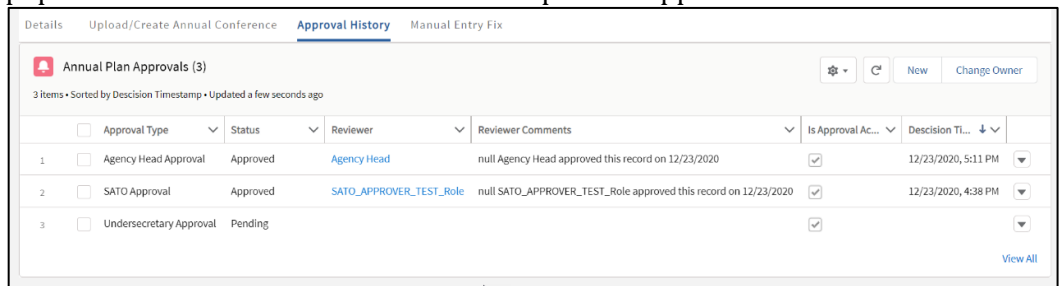
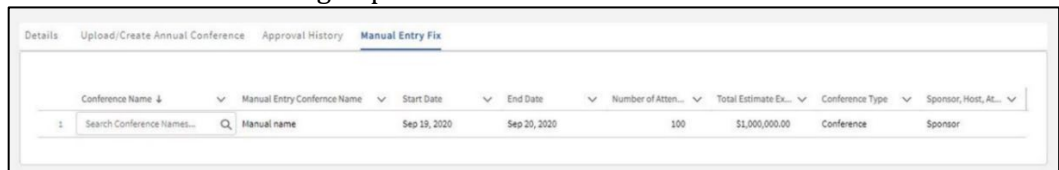


Figure 3: Upload Annual Conference

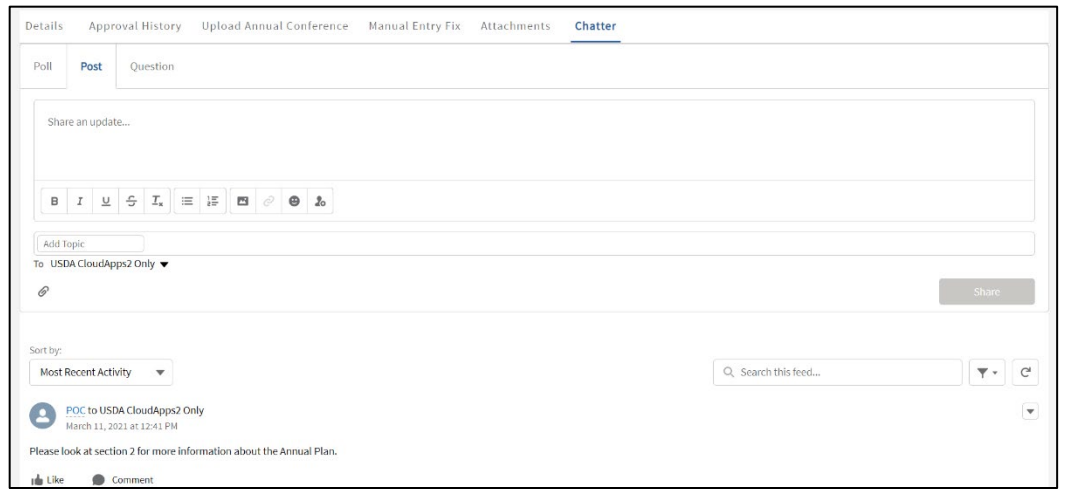
- **Approval History** – this tab holds all approvals that have been made on the annual plan. This section is blank while the plan is developing and only begins to be populated once the POC has submitted the plan for approval



- **Manual Entry Fix** – this section will be used to manual fix the conference names of conferences added through upload.



- **Chatter tab** – this section can be used to collaborate with users by typing your comments in the feed.



D. Add Conferences to an Annual Plan

There are two ways to add conferences to an annual plan, this can be done either **manually** or through an **.CSV upload**.

1. Manual Annual Conference Entry – To add a conference request to an annual plan manually, a user can click on the **Create Annual Conference button** which can be found either on the top of the page.
Note: *Conferences can only be added to an annual plan that is in “developing plan” status*
 - a. Once you click on the button a popup will appear to add the following fields;

Create Annual Conference

NASS Agency Plan 2017 Conference Request

* Conference Type

---None---

* Name of Conference or Training

Search Conference Names...

* Sponsor, Host or Attend?

---None---

* City

* State

---None---

* Country

---None---

* Number of Attendees

* Start Date

* End Date

* Total Cost

* Justification / Reason for Conference or Training ⓘ

* Conference Point of Contact

Next

Note: If the conference costs more than \$3,000 per attendee or \$600 per attendee per day, the user will be prompted to add an explanation. After this, the user will have the ability to upload an attachment

- b. Once a conference request has been created, click the next button and a user can choose to either create another annual conference or finish the process;

The screenshot shows a modal window titled "New Annual Plan Conference". Below the title is the text "AMS Agency Plan 2022 Conference Request". A red asterisk indicates a required field: "Would you like to create a new annual conference request?". A dropdown menu is open, showing the option "No". A blue "Next" button is located at the bottom right of the form.

The screenshot shows the same modal window after the "Next" button is clicked. The text "Conference CR-0625 has been created and submitted for approval." is displayed in the center. A blue "Finish" button is located at the bottom right of the form.

2. Once the user the process is complete, all conferences will be displayed on the conference's component below. Please refresh the page if you do not see your conference request on the Annual Plan.

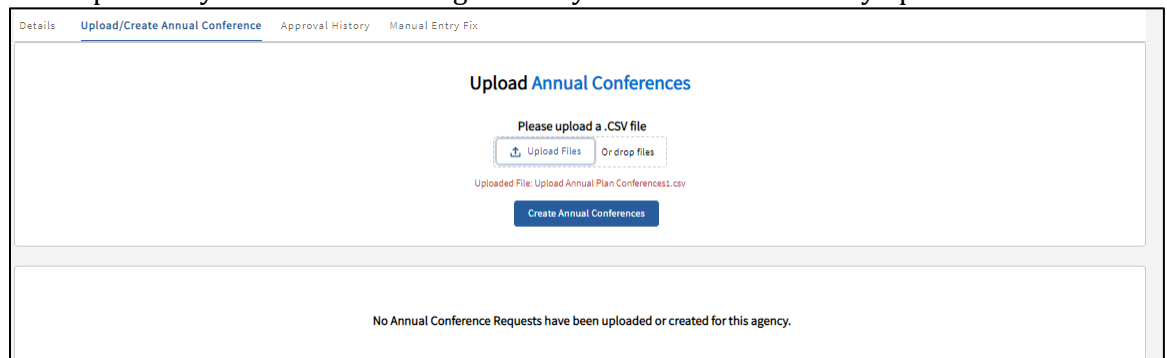
	Conference Re...	Start Date	End Date	Number of Atten...	Total Estimate Ex...	Conference Type	Sponsor, Host, At...	Status	Remove
1	Apple Crop Outlook and	Dec 24, 2020	Jan 5, 2021	25	\$5,000.00	Training	Sponsor	On Annual Plan	

3. Adding Conferences using Upload Functionality
- First navigate to the **Upload/Create annual Conferences tab** and **download** the template by **clicking on the bolded Annual Conferences button** (see: Figure 4: Upload Annual Conference).
 - Only enter information in **column B or C**
 - Do not leave rows blank between entry
 - Ensure that the date fields to the Date format on the xlsx file

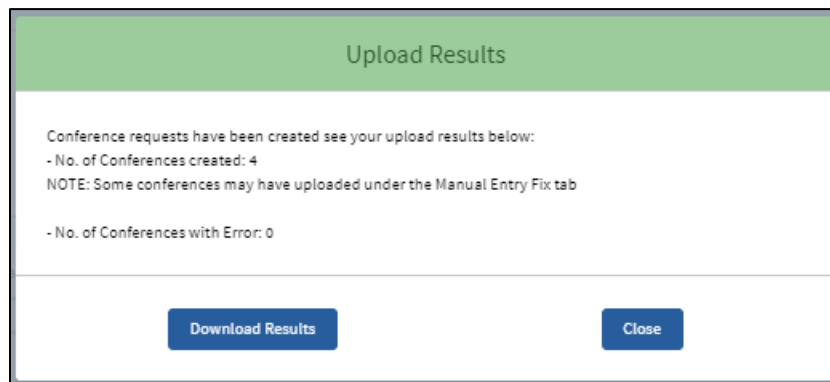
PLEASE DO NOT ALTER THE INFORMATION ON THIS SPREADSHEET									
Notes for data entry: Only enter information in Column B (Conference Name) or Column C (Manual Entry Conference Name) Do no leave rows blank inbetween entries Check for errors before converting to an csv for upload									
Conference Type	Conference Name	Manual Entry Conference Name	Sponsor, Host, Attend	State	City	Start Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)	Number of Attendees	Total Cost
Training	Conservation Planning Training		Sponsor	Alabama	Montgomery	9/20/2020	9/21/2020	100	100000

- e. Check for errors or incorrect data before converting to an CSV file.
- User will need to save the xlsx file as a .csv file. THIS is important, you cannot rename the file to a CSV it must be saved in .csv format. Avoid editing the .csv file once saved.
 - Enter the conference information in the downloaded excel spreadsheet
- Note:** The first row is sample data for reference, it will need to be deleted.

- f. Upload that spreadsheet as a .CSV file select the Upload Files button
- g. Once uploaded you will see a message that says the file is successfully uploaded



- h. After that message the user should then select the Create Annual Conference button to create the annual conference records.
- i. Once uploaded you will see a confirmation message telling the user the number of errors, or uploaded items.



- j. Check the manual error fix tab after uploading to ensure all conference match to a name in the system.

Note: The system will not allow a user to submit the Annual Plan for approval if there are any records in the manual entry conference tab.

Conference Name ↓	Manual Entry Conference Name	Start Date	End Date	Number of Atten...	Total Estimate Ex...	Conference Type	Sponsor, Host, At...
1	<input type="text" value="Search Conference Names..."/>	<input type="text" value="Manual name"/>	Sep 19, 2020	Sep 20, 2020	100	\$1,000,000.00	Conference Sponsor

- k. The conference will be visible in the related conferences section at the bottom of the record page. You may have to refresh your page.

Confere...	Start Date	End Date	Number of Att...	Total Estimat...	Conference T...	Sponsor, Host...	Status	Remove	
1	Acquisitions Fundam	Oct 20, 2020	Nov 10, 2020	223	\$202,321,334...	Conference	Host	On Annual Plan	
2	Conference on Poultry	Sep 5, 2020	Sep 21, 2020	1,222	\$22,222,222,...	Conference	Sponsor	On Annual Plan	
3	Congress of European	Aug 20, 2020	Sep 21, 2020	111	\$1,000,000.00	Training	Sponsor	On Annual Plan	
4	Child Nutrition Access	Jul 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Operational	Sponsor	On Annual Plan	

- l. To edit a conference on an annual plan, use the mouse and click on the Start Date, End Date, Number of Attendees, Total Estimate Expenses as they are the only fields that can be edited.
- To remove a conference from the annual plan, select the Remove button at the end of the row.

Conference Re...	Start Date	End Date	Number of Atten...	Total Estimate Ex...	Conference Type	Sponsor, Host, At...	Status	Remove	
1	Conference on Poultry Int	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Conference	Sponsor	On Annual Plan	
2	Conference on Poultry Int	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Training	Sponsor	On Annual Plan	
3	Conference on Poultry Int	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Operational	Sponsor	Removed By Agency	
4	Association for Talent & D	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Conference	Sponsor	On Annual Plan	

Note: There are two cases when a conference will be present on the Manual Entry Fix 1. The user uploaded a conference using the Manual entry column (column B) on the csv template, or the system could not match a conference name selected on the conference upload CSV template (column B) to the conference name in the system. This is usually an issue when the spread sheet is out of sync with the system. To clear a conference off this list, populate the Conference name field, in the first column. Type a keyword and press enter for a list of possible conference name matches.

E. Annual Plan Approval Process

Agency annual plans consist of multiple annual conferences. These conferences consist of high-level information about the conference. The **Agency Annual plans** consisting of **Agency Annual Conferences** roll up to the **USDA Annual plan** for **OCFO** and **Deputy Secretary approval**.

Agency POCs need to make sure their **Agency's Annual Plan** is fully approved through **Pending Dep Sec Approval** for it to be visible and subsequently approved under the **USDA Annual Plan**. Additionally, before an OCFO starts the **OCFO preparation**, they need to ensure all Agency Annual Plans are at the **Pending Dep Sec Approval** level or they will not roll up to the USDA Annual Plan. Not rolling up the USDA plan will cause the status of the **Agency Annual Plan** to remain unapproved once the USDA plan has been approved.

USDA
Conference Management System

Home Conference Requests Annual Plans More ▾

Search...

Annual Plan
USDA - 2024 - Annual Plan

Status: Deputy CFO Review Fiscal Year: 2024

Progress: Deputy CFO Review (Active) → Deputy Secretary Review → Approved

This Annual Plan is pending Deputy CFO Review: Available Approvers: - DepCFO

Total Conferences: 0 Count of Attendees: 0 Total Cost: 0

Count of High Cost Conference: 0
Manual Entry Fix Count: 0
Last Updated at : 1/13/2021, 12:12 PM

Annual Conferences Approval History **Related Annual Plans**

Annual Plans (2) Settings Refresh New

2 Items • Sorted by Annual Plan Name • Updated a few seconds ago

	Annual Plan Name ↑	Agency	Fiscal Year- do not use	Status
1	AMS Agency Plan 2024	AMS		Developing Plan
2	RD Agency Plan 2024	RD		Developing Plan

[View All](#)

F. Agency Annual Plan Approval Process

1. Ensure that all conference requests are uploaded to the plan and the information on the conferences is correct. Although conferences can still be submitted (*See Create Conference Request Section*) that were left off the annual plan, the goal is to ensure as many plans are as complete as possible.
2. **Once all conferences have been added to the plan and are checked for accuracy, Submit Plan for Approval:** Agency POC prepares the Agency Annual plan, ensures that all required annual conferences are on the plan, and Submits the Agency Annual plan for approval by selecting **Submit Plan for Approval**.

Note: Be sure that all conferences are in the plan before submitting for approval as the user will not have the ability to add conferences once the approval process has started.

Conferenc...	Conferenc...	Start Date	End Date	Number of...	Total Esti...	Conferenc...	Sponsor, H...	Status	Remove
1	CR-12623	Affordable Hou...	Mar 22, 2021	Mar 29, 2021	120	\$12,000.00	Conference	Sponsor	On Annual Plan
2	CR-12622	Conference on ...	Mar 21, 2021	Mar 28, 2021	100	\$10,000.00	Training	Sponsor	On Annual Plan

3. Annual Plan Approvers:

- a. At the agency level the annual plan goes through the SATO, Agency Head, and Under Secretary.
- b. Each approver will go through the same process. When the approval lands at their level, the approver noted in the Available Approvers will have access to the approval buttons. Users have two options on the approval decision: Approve or Reject.
 - By selecting **Approve**, this will move the annual plan on to the next approver.
 - By selecting **Reject**, this will stop the approval process and set the plan back to the status of Developing Plan. From here, the POC can add new conferences or edit conferences. At any point in the approval process an approver can remove conferences from the plan. Conferences can only be added if the status of the annual plan is Developing Plan.
4. Once an agency's annual plans have reached the status of Pending Dep Sec Approval, the annual conferences on the plan will roll up to the UDSA level plan where along with all other agencies, the annual conferences will be approved for the fiscal year.
5. Individual agency annual plans will stay at the status of Pending Dep Sec until OCF0/USDA approval has completed. Once approved by the Deputy Secretary, the individual agency plans will be approved.

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with the USDA logo, 'Home', 'Pending Conference Requests', and 'More' with a dropdown arrow. A search bar is located on the right. Below the navigation bar, the main content area shows an 'Annual Plan' for 'DA - 2030 - Annual Plan'. It includes a metadata table with columns for Agency (DA), Status (SATO Approval), USDA Annual Plan (USDA Plan 2030), USDA Plan Status (Annual Plans in Progress), and Fiscal Year (2030). A progress bar below the table shows the current step as 'SATO Approval', with other steps being 'Agency Head Approval', 'Undersecretary Approval', 'Pending Dep Sec Approval', and 'Approved'. A central notification box states 'This Annual Plan is pending SATO Approval:' and asks 'Your action is required. What would you like to do?' with 'Approve' and 'Reject' buttons. To the right, 'Available Approvers:' lists '- Test SATO' and '- Test SATO'. Below this, summary statistics are shown: 'Total Conferences: 2', 'Count of Attendees: 220', 'Total Cost: \$22,000.00', 'Count of High Cost Conference: 0', and 'Manual Entry Fix Count: 0'. The last updated time is '3/21/2021, 10:56 AM'. At the bottom, there are tabs for 'Details', 'Approval History', 'Upload Annual Conference', 'Manual Entry Fix', 'Attachments', and 'Chatter'. The 'Details' tab is active, showing fields for Annual Plan Name (DA Agency Plan 2030), Fiscal Year (2030), Agency (DA), and USDA Annual Plan (USDA Plan 2030).

6. If the User is not one of the approvers designated on the Available approvers list, they will not see the approval buttons.

Annual Plan
AMS - 2018 - Annual Plan

Reset Annual Plan Approval | Create Annual Conference | View Annual Conferences Report

Agency: AMS | Status: SATO Approval | USDA Annual Plan: USDA Plan 2018 | USDA Plan Status: Annual Plans in Progress | Fiscal Year: 2018

Approval Progress: SATO Approval (Active) | Agency Head Approval | Undersecretary Approval | Pending Dep Sec Approval | Approved

This Annual Plan is pending SATO Approval: Available Approvers: - Test SATO

Total Conferences: 12 | Count of Attendees: 26299 | Total Cost: \$63,158,443.00 | Count of High Cost Conference: 7 | Manual Entry Fix Count: 0 | Last Updated at: 3/24/2021, 3:59 PM

Details | Approval History | Upload Annual Conference | Manual Entry Fix | Attachments | Chatter

Annual Plan Name: AMS Agency Plan 2018 | Fiscal Year: 2018
 Agency: AMS | USDA Annual Plan: USDA Plan 2018 | USDA Plan Status: Annual Plans in Progress
 Created By: Melissa Derrickott, 3/23/2021, 12:34 PM | Last Modified By: Michael Farrelly, 3/24/2021, 4:02 PM

Conference Nu...	Conference Na...	Start Date	End Date	Number of Att...	Total Estimate ...	Conference Type	Sponsor, Host,...	Status	Remove
1	CR-12699	American College o...	Jan 23, 2021	432	\$33,445.00	Operational	Sponsor	On Annual Plan	
2	CR-12698	Access and Functio...	Jan 22, 2021	343	\$4,444.00	Training	Host	On Annual Plan	

Annual Plan
AMS - 2018 - Annual Plan

Reset Annual Plan Approval | Create Annual Conference | View Annual Conferences Report

Agency: AMS | Status: SATO Approval | USDA Annual Plan: USDA Plan 2018 | USDA Plan Status: Annual Plans in Progress | Fiscal Year: 2018

Approval Progress: SATO Approval (Active) | Agency Head Approval | Undersecretary Approval | Pending Dep Sec Approval | Approved

This Annual Plan is pending SATO Approval: Available Approvers: Test SATO

Your action is required. What would you like to do?

Total Conferences: 12 | Count of Attendees: 26299 | Total Cost: \$63,158,443.00 | Count of High Cost Conference: 7 | Manual Entry Fix Count: 0 | Last Updated at: 3/24/2021, 3:55 PM

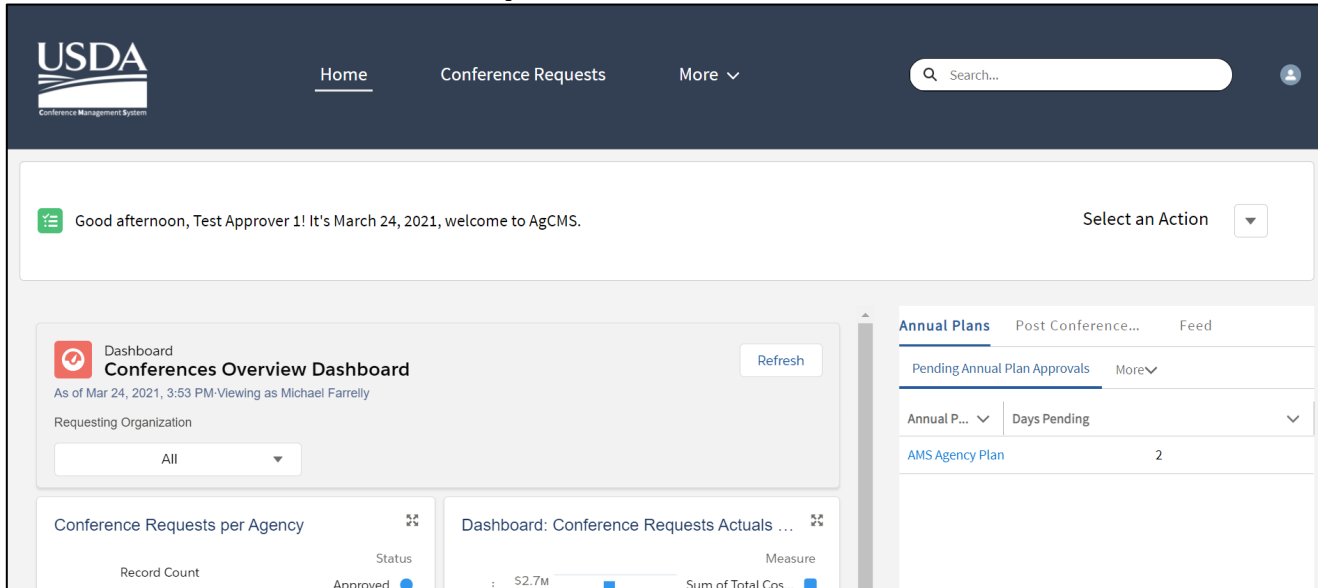
Details | Approval History | Upload Annual Conference | Manual Entry Fix | Attachments | Chatter

Annual Plan Name: AMS Agency Plan 2018 | Fiscal Year: 2018
 Agency: AMS | USDA Annual Plan: USDA Plan 2018 | USDA Plan Status: Annual Plans in Progress
 Created By: Melissa Derrickott, 3/23/2021, 12:34 PM | Last Modified By: Michael Farrelly, 3/24/2021, 3:57 PM

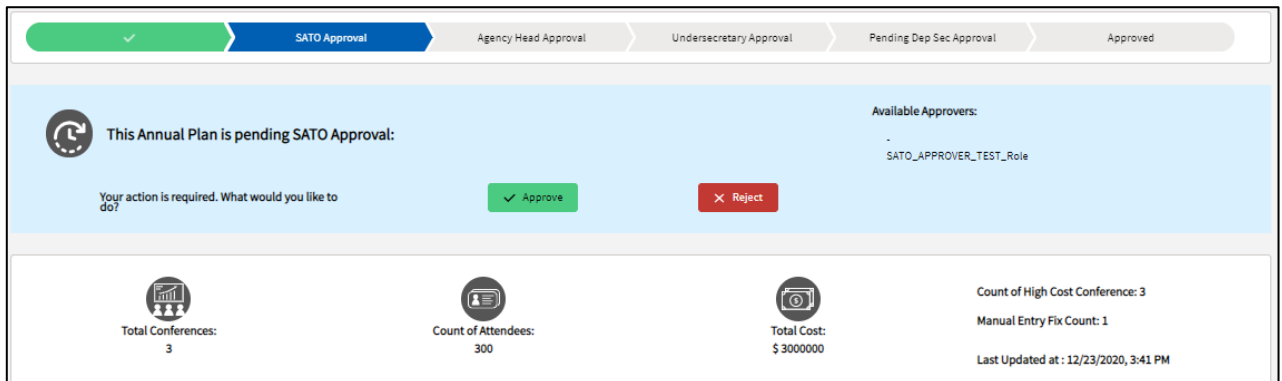
Conference Nu...	Conference Na...	Start Date	End Date	Number of Att...	Total Estimate ...	Conference Type	Sponsor, Host,...	Status	Remove
1	CR-12699	American College o...	Jan 23, 2021	432	\$33,445.00	Operational	Sponsor	On Annual Plan	
2	CR-12698	Access and Functio...	Jan 22, 2021	343	\$4,444.00	Training	Host	On Annual Plan	

G. Navigate to an Annual Plan Awaiting Your Approval

1. All users with approval access have a component on their homepage that contains the lists of annual plans pending their approval
2. Navigating to the component:
 - a. Home page > **Annual Plan Approvals** Tab > **Pending Annual Plan Approvals** Tab.
3. Click on the Annual Plan to start review process.



4. On the Annual Plan Details Page, Available approvers will have the options for **Approve/Reject**, along with the Annual plan details.



Note: OCFO Users can make changes manually on the following fields (Start Date, End Date, Number of Attendees, Total Estimate Expenses) while reviewing the Annual Plan if the Annual Plan does not have a status of **Pending Dep Sec Approval** or **Approved**.

H. USDA Annual Plan Approval Process

1. USDA Annual plan approval process should be initiated by the OCFO. Before Initiating this process, the OCFO needs to make sure all **Agency Annual Plans** under **Related Agency Plans** are in **Pending Dep Sec Approval** status before the OCFO selects the **Start OCFO Preparation** button.
2. **Start USDA Level Approval:** POC prepares the Agency Annual plans, ensures all required annual plans are reviewed and Pending for Dep Sec approval. The OCFO then clicks the **Start OCFO Preparation** button.

Note: The approval levels are set up during OCFO routing creation. Additionally, there is only one USDA plan per fiscal year.

3. Once USDA annual plan approval has started, any agency plans not set to the Pending Dep Sec status, will have their approval process suspended and they will not be able to continue the agency level approval.

Note: Do not initiate OCFO Preparation until all agency level annual plans have reached the Pending Dep Sec status as they will not be allowed to add or approve plan at the agency level.

4. There are three levels of approval for USDA plans: **OCFO Preparation**, **Deputy CFO Review**, and **Deputy Secretary Review**. Each approver will go through the same process. When the Approval lands on their level, the approver noted in the Available Approvers will have access to the approval buttons. Users have two options on the approval. Approve or Reject. Selecting Approve will move the annual plan on to the next approver and selecting Reject will stop the approval process and set the plan back to the status of Annual Plan in Progress. At any point in the approval process an approver can remove conferences from the plan or edit conferences.
 - a. **USDA Approvers** can remove a conference. When removed, the status of the conference will be updated to **Removed by USDA**.

Conference ...	Agency	Start Date	End Date	Number of Atte...	Total Estimate ...	Conference Type	Sponsor, Host, ...	Status	Remove
1 Acquisitions Fundamen	RD Agency Plan 2027	Oct 20, 2020	Nov 10, 2020	229	\$2,022,234.00	Conference	Host	On Annual Plan	
2 Acquisitions Fundamen	RD Agency Plan 2027	Oct 20, 2020	Nov 10, 2020	22	\$222,321,334.00	Conference	Host	Removed By USDA	

- b. **USDA Approvers** can make changes manually on the following fields (Start Date, End Date, Number of Attendees, Total Estimate Expenses) while reviewing the Annual Plan and click on **Save**. **USDA Approvers** can only make changes to these fields when the Annual Plan **does not** have a status of **Approved**.

Conference Re...	Start Date	End Date	Number of Atten...	Total Estimate Ex...	Conference Type	Sponsor, Host, AL...	Status	Remove
1 Conference on Poultry Int	Sep 20, 2020	Sep 21, 2020	150		Conference	Sponsor	On Annual Plan	
2 Conference on Poultry Int	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Training	Sponsor	On Annual Plan	
3 Conference on Poultry Int	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Operational	Sponsor	Removed By Agency	
4 Association for Talent & D	Sep 20, 2020	Sep 21, 2020	100	\$1,000,000.00	Conference	Sponsor	On Annual Plan	

Cancel Save

- c. Once an approver has selected an annual plan to approve, they will be directed to the annual plan page where the Decision buttons will be available. An approver has two options: **Approve** and **Reject**.

Home Pending Conference Requests Reports

Search...

Annual Plan
USDA - 2027 - Annual Plan

Status: OCFO Preparation Fiscal Year: 2027

Available Approvers:
- OCFO Prep

Your action is required. What would you like to do?

Approve
Reject

Total Conferences:
2

Count of Attendees:
245

Total Cost:
\$ 224343568

Count of High Cost Conference: 2
Manual Entry Fix Count: 0
Last Updated at: 12/22/2020, 1:25 PM

Annual Conferences Approval History Related Annual Plans

Conference ...	Agency	Start Date	End Date	Number of Atte...	Total Estimate ...	Conference Type	Sponsor, Host, ...	Status	Remove
1 Acquisitions Fundamen	RD Agency Plan 2027	Oct 20, 2020	Nov 10, 2020	223	\$2,022,234.00	Conference	Host	On Annual Plan	
2 Acquisitions Fundamen	RD Agency Plan 2027	Oct 20, 2020	Nov 10, 2020	22	\$222,321,334.00	Conference	Host	On Annual Plan	

- d. After the **Deputy Secretary Review** level has been **Approved**, the USDA plan will be moved to a status of **Approved**. Additionally, any Agency plans that were set to **Pending Dep Sec** (making them included in the USDA Plan) will be moved to a status of approved.

USDA Conference Management System

Home Pending Conference Requests Reports Search...

Annual Plan
USDA - 2027 - Annual Plan

Status: Deputy CFO Review Fiscal Year: 2027

Progress: Deputy CFO Review (Active), Deputy Secretary Review, Approved

This Annual Plan is pending Deputy CFO Review: Available Approvers: - DepCFO

Total Conferences: 2
 Count of Attendees: 245
 Total Cost: \$ 224343568
 Count of High Cost Conference: 2
 Manual Entry Fix Count: 0
 Last Updated at: 12/22/2020, 1:26 PM

Annual Conferences Approval History Related Annual Plans

Conference ...	Agency	Start Date	End Date	Number of Atte...	Total Estimate ...	Conference Type	Sponsor, Host, ...	Status	Remove
1 Acquisitions Fundamen...	RD Agency Plan 2027	Oct 20, 2020	Nov 10, 2020	223	\$2,022,234.00	Conference	Host	On Annual Plan	
2 Acquisitions Fundamen...	RD Agency Plan 2027	Oct 20, 2020	Nov 10, 2020	22	\$222,321,334.00	Conference	Host	On Annual Plan	

USDA Conference Management System

Home Pending Conference Requests Reports Search...

Annual Plan
USDA - 2027 - Annual Plan

Status: Approved Fiscal Year: 2027

Progress: Approved

Status: Approved

Total Conferences: 1
 Count of Attendees: 223
 Total Cost: \$ 2022234
 Count of High Cost Conference: 1
 Manual Entry Fix Count: 0
 Last Updated at: 12/22/2020, 1:33 PM

Annual Conferences Approval History Related Annual Plans

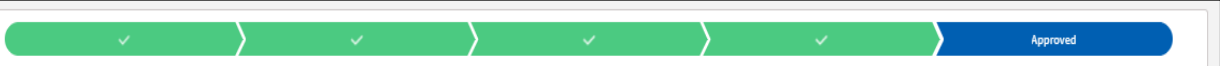
Annual Plans (1)

1 item • Updated a few seconds ago

Annual Plan Name	Agency	Fiscal Year	do not use	Status
1 RD Agency Plan 2027	RD			Approved

View All

- Overall Plan Approval:** Agency Annual Plans that are in **Pending Deputy Secretary Approval** status will be updated to **Approved** when the USDA Annual Plan is **Approved**. Now that agency level plans are approved, only approved plans will roll up to USDA annual plan. Agency plans not approved will not roll up to the USDA annual plan.



Status: Approved

 Total Conferences: 4	 Count of Attendees: 121	 Total Cost: \$ 570000	Count of High Cost Conference: 4 Manual Entry Fix Count: 2 Last Updated at: 12/23/2020, 7:41 PM
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Annual Conferences Approval History **Related Annual Plans**

Annual Plans (6) [New](#) [Change Owner](#)

6 Items • Sorted by Status • Updated a few seconds ago

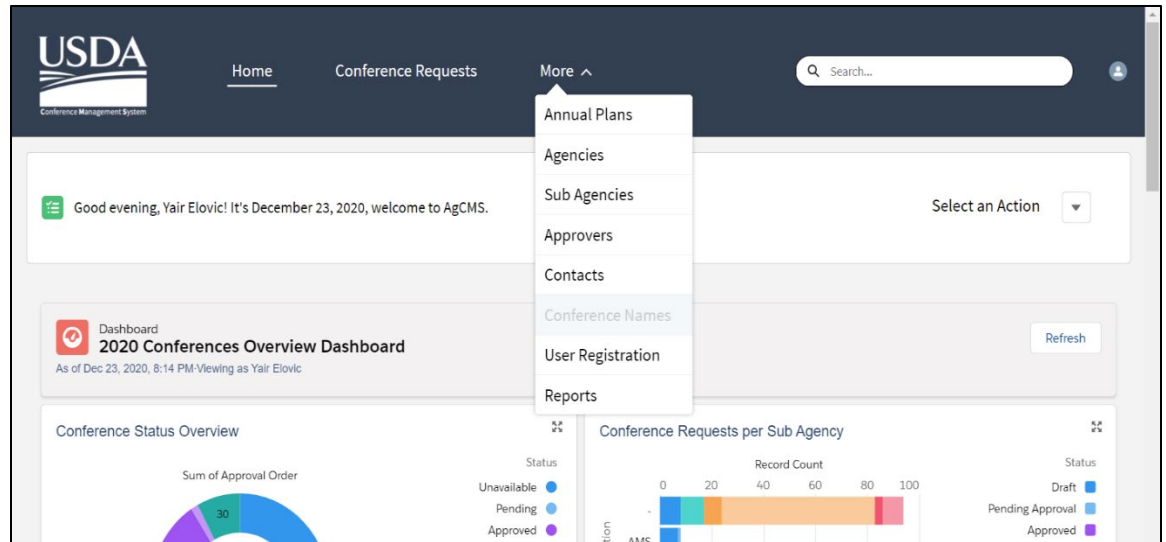
<input type="checkbox"/>	Annual Plan Name	Agency	Fiscal Year- do not use	Status	
1	OGC Agency Plan 2021	OGC		Approved	
2	OGC Agency Plan 2021	AMS		Developing Plan	

IV. Conference Requests

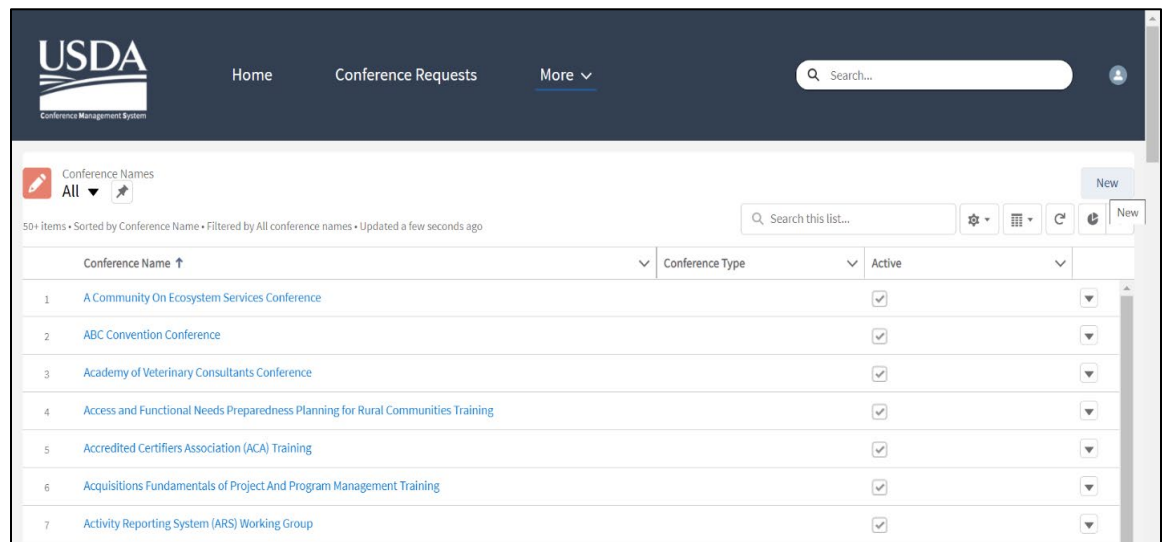
Once the appropriate agency staff have registered and the routing lists have been created, conference requests can be entered and submitted for approval.

A. Conference Names

1. Conference names are no longer a free text field on the conference request template. To standardize the conference names this list is reviewed and managed by the OCFO. Agency POCs can request a new conference name to be added to the list and OCFO will review and decide if the new name should be available for use.
2. Creating a conference name requires Agency POC or OCFO user access.
3. Agency POC Creating and OCFO Activating Conference Names
 - a. On the homepage, navigate to the **Conference Names** page.



- b. **Agency POC:** On the Conference Names page, select the **New** button.



- c. **Agency POC:** Add the **Conference Name** and **Save**.

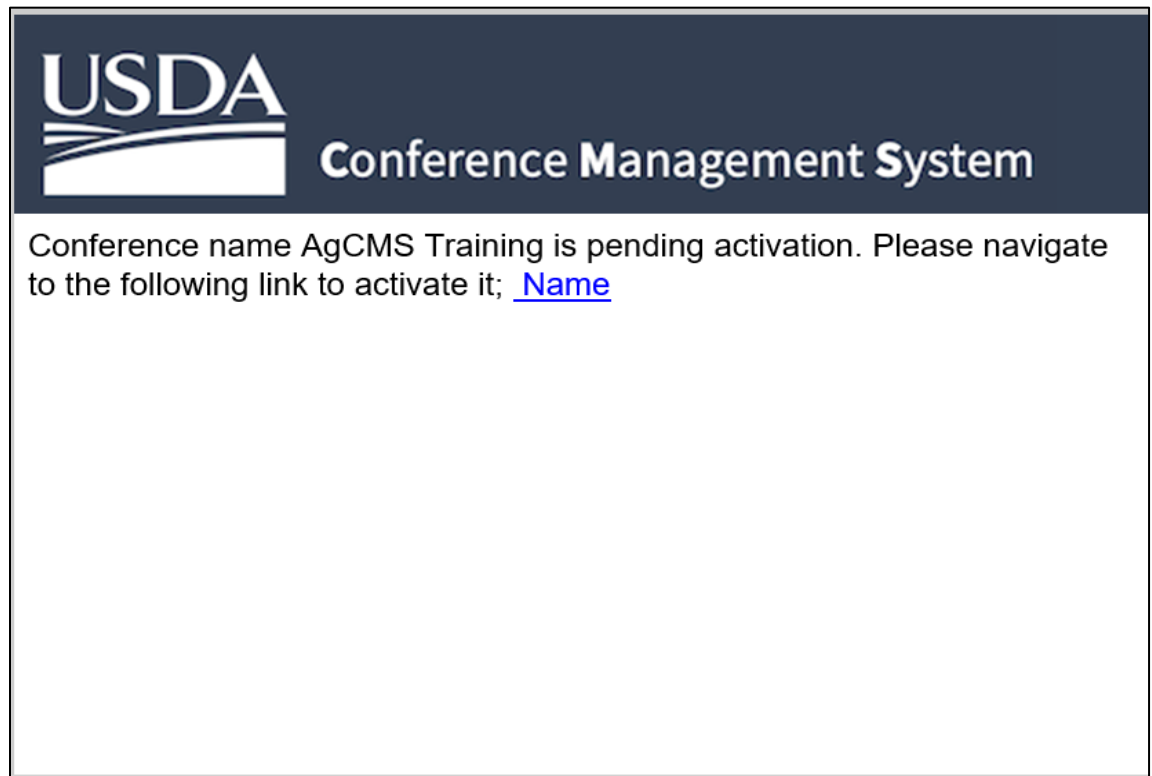
New Conference Name

Information

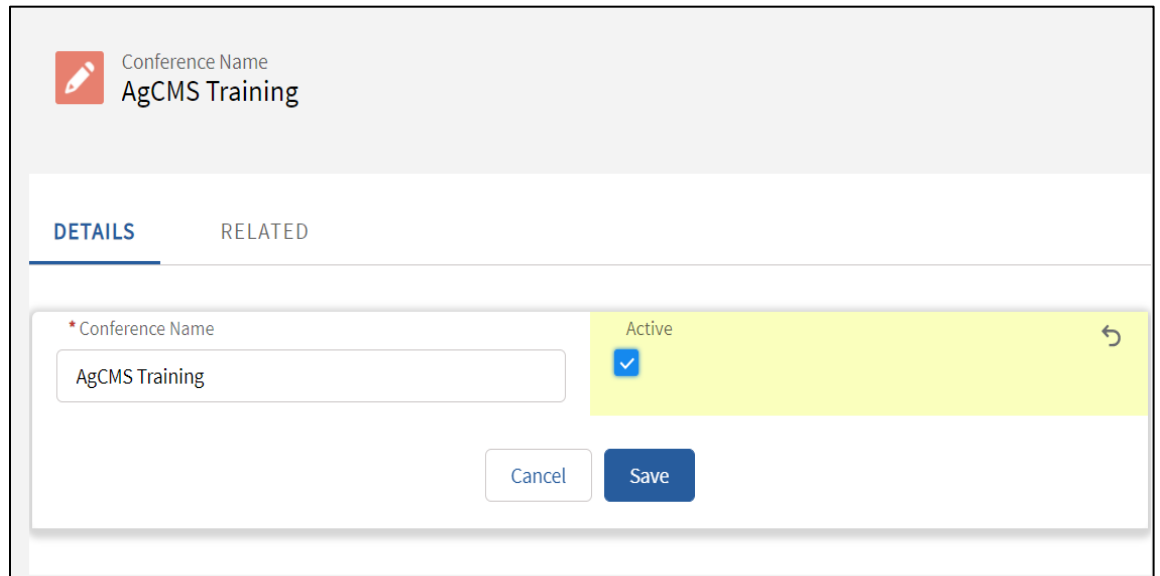
* Conference Name Active

Note: The only users that are able to check the **Active** box are OCFO users. This will be covered in the next section under OCFO actions.

- d. All OCFO members will receive an email notification that a Conference Name has been created and requires activation.

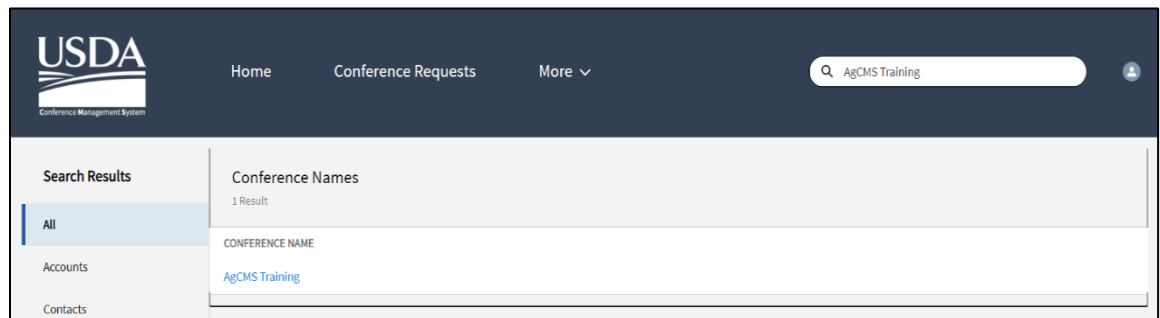


- e. Using either global search, or the link in the email, an OCFO user can navigate to the **Conference Name** page and click the **"Active" checkbox**. This will make the conference name available for use in conference requests.

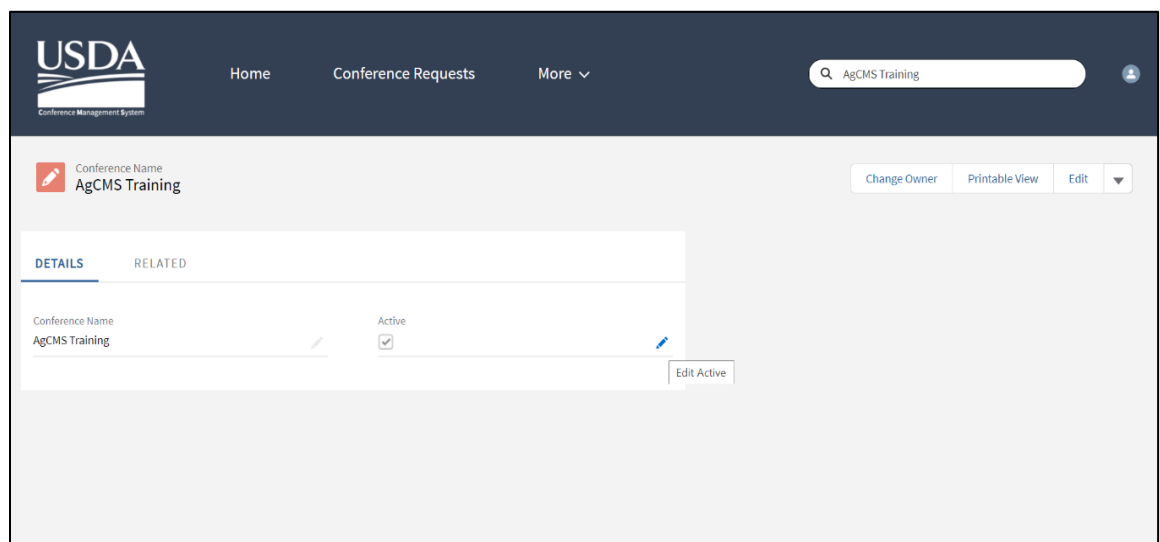


4. Deactivating Conference Names (OCFO)

- a. Navigate to the Conference Name by using global search or the menu item.



- b. Click the **Pencil Icon** next to the **Active** box and **uncheck** the field.



Note: Both a POC and OCFO user can Deactivate a conference name

B. Conference Status Meanings

Conferences requests status are explained below

1. Conference Request

- a. **Draft** – The conference request is in progress and has not be submitted. Newly created and copied conferences are automatically set to this status. Only the submitter or conference owner can edit at this stage.
- b. **Pending Approval** – The conference has been submitted and is actively going through the approval process.
- c. **Needs Additional Information** – The conference was submitted but was returned for edits by an approver. Only the submitter or conference owner can edit the conference at this stage.
- d. **Approved** – The conference has completed the approval process and is awaiting Post Conference Details completion.
- e. **Rejected** – The conference request was denied. The request may be reactivated by copying and resubmitting the conference.
- f. **Complete** – The conference has completed the approval process and Post Conference Details entry.
- g. **Archived** – A conference that was not completed (*i.e., draft, pending, or additional information*) at the time it was migrated from CTAT. The request may be reactivated by copying and resubmitting the conference.

2. Annual Plan

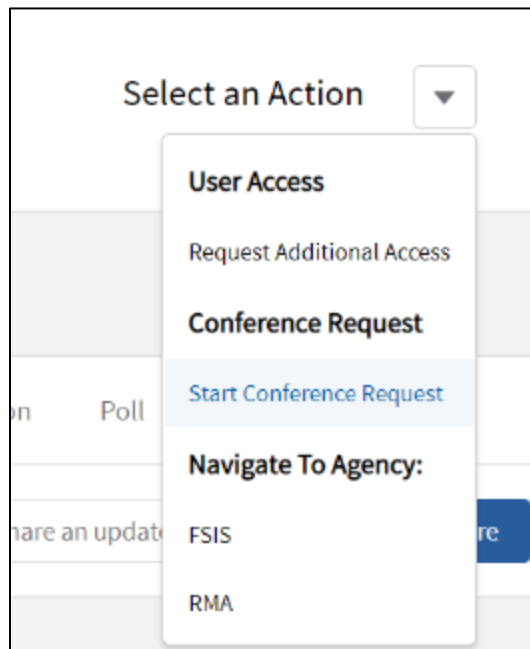
- a. **On Annual Plan** – The conference is on the annual plan and has not been removed or placed on the error list.
- b. **Error List** – The conference is on the Manual Entry Fix tab and needs the conference name populated.
- c. **Removed by Agency** – The conference was removed during the agency approval process.
- d. **Removed by USDA** – The conference was removed during the USDA approval process.
- e. **Approved on Annual Plan** – The conference has been approved at the USDA level.
- f. **CTAT Annual Plan** – An archived annual plan conference that was migrated from CTAT.

C. Create a New Conference Request

Conference requests can be created entirely new or copied from an existing conference on or off an annual plan.

1. Start New Conference Request

- a. On the submitters home page, the submitter can create a new conference by navigating to the **Start Conference Request button** in their quick action menu.





- b. Once this button is clicked, a user will be required to input the following fields
 - Name of Conference


- Requesting Organization – Only agencies the submitter has access to will populated the requesting agency
- Request Sub Organization – Only sub agencies with an active routing list will show up on the list

Start a Conference Request


* Name of Conference

 A Community On Ecosystem Services Conference 

Requesting Organization

RMA 

Requesting Sub Organization

OA 

NOTE: You are starting a Conference Request that is not connected to an Annual Plan. To connect a request to an Annual Plan, the request will need to be copied from an Annual Plan Conference Request.

[Create Conference Request](#) [Close](#)

Note: *Conferences started from this menu will not be linked to an annual plan. It is encouraged that all conferences are copied/started from an approved annual plan.*

2. When basic details such as Conference Name, Requesting Organization (Agency), requesting Sub Organization (Sub-Agency) filled out on the Start conference request form, the request will be created with a Draft Status after clicking on the **Create Conference Request**. From there the user will be directed to the conference request record page.

USDA Conference Management System

Home Conference Requests Reports Search...

Conference Request: **Virtual Task Force/Strike Team Leader Training** + Follow Copy Conference Approval Change Owner

Conference Number: CR-0136 Annual Conference: Requesting Organization: AMS Requesting Sub Organization: Status: Draft Post Conference Status: Not Available

Draft Pending Approval Approved Rejected Need Additional Information Complete

Conference Request Conference Information Conference Approvals Chatter Post Conference Details Attachments

General Conference Information

Conference Justifications

Conference Sponsorship Information

Requestor Information

Overall Attendee Information

Facility Information and Justifications

Overall Cost Information

Accounting Information

Miscellaneous Attachments

GENERAL CONFERENCE INFORMATION

Conference Name: Virtual Task Force/Strike Team Leader Training

Conference Dates: Estimated Start Date: Jan 4, 2021 Estimated End Date: Jan 11, 2021

Conference Location: Country: United States of America State: Florida City: Miami

Purpose: Food Inspection conference to review annual financial report

Justification: Food Inspection conference to review annual financial report

Event Type: Conference Training Operational

This is a recurring event: Yes
*Recurring Event Frequency (in months):

Continuing Professional Education: No

Will your agency be hosting a booth (USDA or otherwise) at the event? Select...

Does this event meet the definition of a 'conference' in Appendix C to Chapter 301 of the Federal Travel Regulations and 5 USC 4101 (4)? Yes

Appendix C to Chapter 301 of the Federal Travel Regulation and USCODE 2011>Title 5

What is/are the roles(s) of your agency in the conference?
 Attendee(s)
 Exhibitor(s)
 Host(s)
 Presenter(s)
 Speaker(s)
 Sponsor(s)

Upload Conference Agendas

Please attach the conference agenda, or if training, the official list of courses.

Or drop files

Conference Website:

→

Presenter(s)

Speaker(s)

Conference Saved

Your Conference has been saved successfully. You may continue working on your conference or leave the page.

All of your conference drafts may be found under (My Draft)

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with 'Home', 'Conference Requests', and 'Reports' links, along with a search bar. Below this, the page title is 'Conference Request: District Director (DD) Meeting/Training'. A progress bar shows the current status as 'Draft', with other stages like 'Pending Approval', 'Approved', 'Rejected', 'Need Additional Information', and 'Complete' visible. A table below the progress bar provides details: Conference Number (CR-0178), Annual Conference, Requesting Organization (AMS), Requesting Sub Organization, Status (Draft), and Post Conference Status (Not Available). A sidebar on the left contains a list of sections with checkboxes: General Conference Information, Conference Justifications, Conference Sponsorship Information, Requestor Information, Overall Attendee Information, Facility Information and Justifications, Overall Cost Information, Accounting Information (checked), and Miscellaneous Attachments. The main content area is titled 'ACCOUNTING INFORMATION' and includes a section for 'Accounting Information for Preferred Location'. It features a 'Funding Type' section with radio buttons for 'Appropriated', 'Multi-Year', 'Reimbursable Funds' (checked), 'No Year Funds', and 'Working Capital'. Below this is an 'Accounting Codes' text field containing 'CDF3'. The 'Contracting' section has a dropdown menu set to 'Yes, competitively awarded', a text area for contract details, and an 'Upload Contracting Documents' section with 'Upload Files' and 'Or drop files' buttons. The 'Non-Federal Contribution' section includes a text field for 'Non-Federal Funding Organization(s)' containing 'AMILS' and a toggle switch for 'An Office of General Counsel (OGC) opinion, or other applicable form, on receiving funds from a non-Federal source had been filed', which is currently set to 'No'. At the bottom, there are navigation arrows and buttons for 'Save as Draft' and 'Continue to Review'.

3. In order to submit a conference request all sections must be completed. The submitter will complete all required sections on the conference request form and once they have all been completed a conference can then continue to review. At any point during this process, a submitter can save their drafted conference and return to it later.
4. Once all sections are completed on the conference form, click on the **Continue to Review** button. The Submitter can click **Continue to Review** button from the bottom of any of the form sections of the conference request in order to reach the conference review page.

- If there is a message **“Incomplete Conference Request”** warning messages displays that means mandatory information is missing, please check that tabs where submitter can see the Check box are not checked indicating that there some mandatory information missing in that section, Submitter can click on any side tabs directly to navigate the section or alternatively click **Left** or **Right Arrow** to navigate to the page to fix the errors. When the conference request has been filled sufficiently, please select the **Continue to Review** button.

The screenshot displays a web interface for a conference request. At the top, the title is "Conference Request: District Director (DD) Meeting/Training". Below this, there are fields for "Conference Number" (CR-0178), "Annual Conference", "Requesting Organization" (AHS), "Requesting Sub Organization", "Status" (Draft), and "Post Conference Status" (Not Available). A progress bar shows stages: Draft (selected), Pending Approval, Approved, Rejected, Need Additional Information, and Complete. A navigation menu includes "Conference Request", "Conference Information", "Conference Approvals", "Chatter", "Post Conference Details", and "Attachments".

The main content area is titled "ACCOUNTING INFORMATION". A modal window is open with the title "Incomplete Conference Request" and the message "All Sections Must Be Complete". The modal has an "Ok" button. In the background, the "ACCOUNTING INFORMATION" section includes checkboxes for "No Year Funds" and "Working Capital", a text field for "Accounting Codes" containing "DFR3", a dropdown for "Contracting" set to "Yes, competitively awarded", and an "Upload Contracting Documents" button.

- Once the conference request has been sufficiently completed and the user has clicked on **Continue to Review**, the page navigates to **Submission Review**. This consists of the **Warnings and Alerts** and **Cost Calculations** sections. The **Warnings and Alerts** indicates potential issues that may prevent the conference request from being approved. The submitter should review the conference request and address the alerts with the goal of eliminating the red alerts (i.e., high risk) and/or limiting the orange ones (low/medium risk). A green alert indicates no issues.

USDA Conference Management System

Home | Conference Requests | Reports | Search...

Conference Request: **A Community On Ecosystem Services Conference**

Conference Number: CR-0129 | Requesting Organization: RMA | Requesting Sub Organization: RMA UAI SUB | Status: Draft | Annual Plan: | Post Conference Status: Not Available

Progress: Draft (selected) | Pending Approval | Approved | Rejected | Need Additional Information | Complete

Tabs: Conference Request | Conference Information | Conference Approvals | Chatter | Post Conference Details | Attachments

Warnings and Alerts

Alerts

- After hours events are often considered by oversight agencies to be a waste of government resources.
- Serving alcohol at conferences portrays a negative appearance to the public.

Warnings

- USDA policy discourages distribution of promotional materials and conferences with this type of expense receive much greater scrutiny from oversight agencies.
- This conference's direct costs (not including salaries and benefits) exceeds \$100,000 and will result in increased reporting requirements and scrutiny from oversight agencies.
- The total number of attendees paid for by the agency for this conference is 0. Please review this submission for accuracy.

Cost Calculations:

TOTAL DIRECT COSTS (W/O SALARIES) <small>Less salaries and benefits.</small>	\$50,000,176.00
TOTAL SALARY AND BENEFIT COST	\$0.00
USDA ATTENDEES <small>USDA and non-USDA paid by agency.</small>	0
TOTAL DAYS	4
COST PER ATTENDEE <small>w/o salaries and benefits.</small>	\$∞
COST PER ATTENDEE PER DAY <small>w/o salaries and benefits.</small>	\$NaN

Buttons: Edit Conference Information | Submit to Review | Save as Draft

- The **Cost Calculations** section shows a summary of costs based on information from the [Overall Attendee Information](#) and the [Overall Cost Information](#). The conference is considered a high-cost event when the **Cost per Attendee** is over \$3,000 or the **Cost per Attendee per Day**, over \$600. A justification for high-cost event should have been entered in the **Justification** field under [General Conference Information](#).
- The submitter can either make further edits by clicking on the **Edit Conference Information** button to navigate back to the form, initiate conference request routing and approver review by clicking on **Submit for Review** or save the current progress and complete at a later time by clicking on **Save as Draft**. To edit a conference, the conference request needs to be in a status of either **Draft** or **Need Additional Information**, where only the Submitter can edit the conference request.

The screenshot displays the USDA Conference Management System interface for a conference request titled "District Director (DD) Meeting/Training". The request is in "Draft" status. Key details include Conference Number CR-0138, Requesting Organization FSA, and Requesting Sub Organization Management Services Division. A progress bar shows the current stage as "Draft".

Warnings and Alerts:

- Alerts:** A red alert box states: "- Check the Conference Justifications section as this conference request does not address all required justifications and does not meet the USDA approval requirements."
- Warnings:** Two orange warning boxes are present:
 - "- This conference's cost exceed \$600 per USDA attendee per day exceeding the thresholds from Congressional Inquiries and will receive additional scrutiny when reported."
 - "- This conference's cost exceed \$3,000 per USDA attendee exceeding the thresholds from Congressional Inquiries and will receive additional scrutiny when reported."

Cost Calculations:

TOTAL DIRECT COSTS (W/O SALARIES) Less salaries and benefits.	\$25,300.00
TOTAL SALARY AND BENEFIT COST	\$0.00
USDA ATTENDEES USDA and non-USDA paid by agency.	5
TOTAL DAYS	8
COST PER ATTENDEE w/o salaries and benefits.	\$5,060.00
COST PER ATTENDEE PER DAY w/o salaries and benefits.	\$632.50

At the bottom of the page, there are three buttons: "Edit Conference Information", "Submit to Review", and "Save as Draft".

Note: Red and orange alerts do not prevent a submitter from submitting the conference request. They serve to notify approvers of potential issues; an approver at any level may decide to reject or return the request for corrections based on these alerts.

- A message appears on the screen after a successful submission. The submitter will also receive an email notification with a **Conference Request Link**.

The screenshot shows a notification dialog box with a green header that says "Conference submitted". Below the header, the text reads "Conference submitted for Review". At the bottom right of the dialog, there is a blue button labeled "Ok".



Conference Management System

Conference **CR-0128** has been submitted and is pending approval.


Conference Name: A Community On Ecosystem Services Conference

Agency Name: RMA

Sub-Agency Name: OA

Link to Conference: [Conference Request Link](#)

Note: A Conference Request can be **submitted** for approval if the Agency listed for this Conference Request has the proper approver set up. If the Agency does not have the proper approvers listed, the system will not allow the user to submit the Conference Request for approval.

 Account
OASCR

Account Record Type: Agency Account Owner: [User16147846563334413803](#)

Agency Details **Approvers** Related Manage Users

No Approvers have been added to this Agency.

Conference Cannot Be Submitted

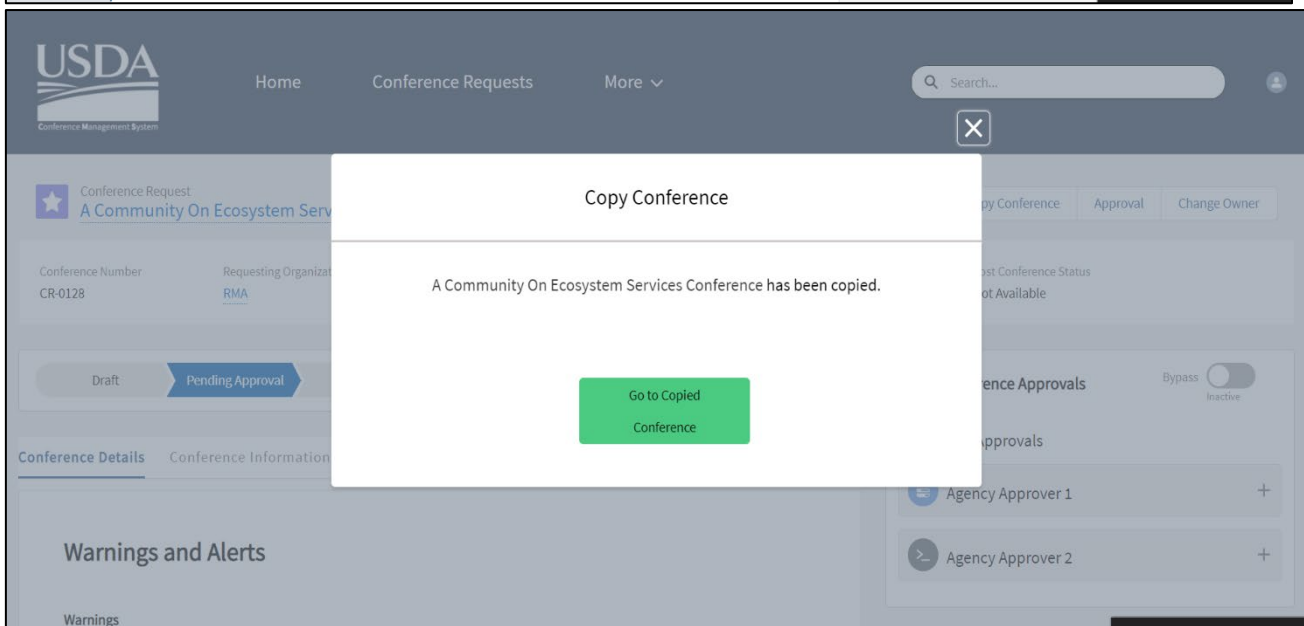
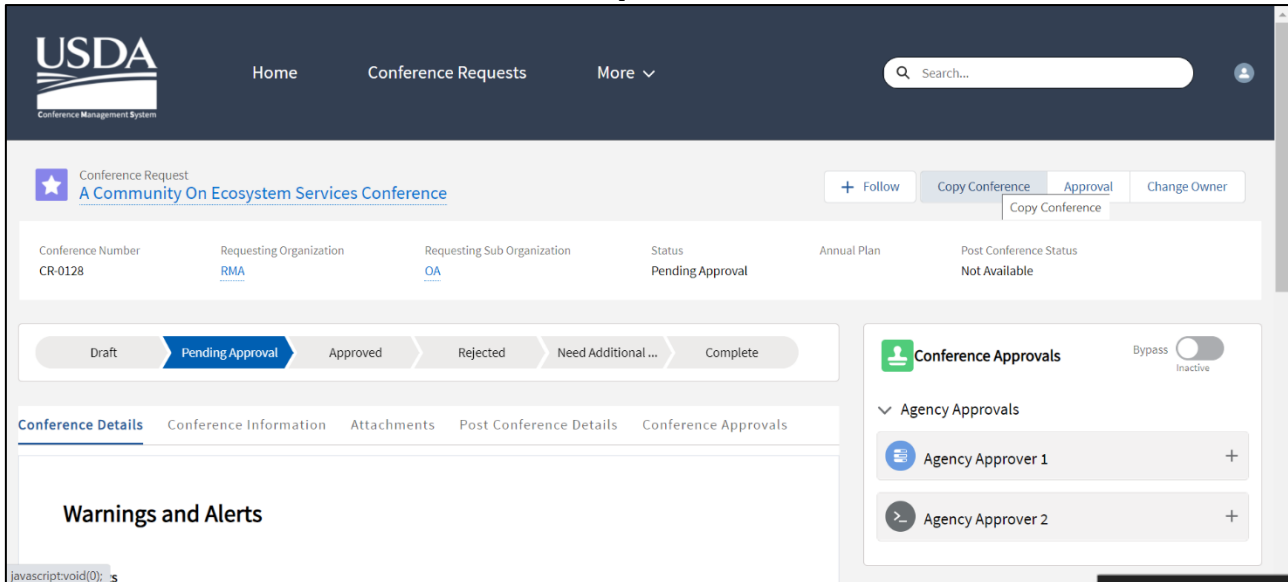
The Requesting Agency does not have all Agency Level Approvers. All are required: SATO, Agency Head, and Under Secretary Approvers.

Ok

D. Copy Conference Request

Users can clone an existing conference request by navigating to the conference request and selecting the **Copy Conference** button. Once the Copy Conference button has been clicked, there will be a **popup with a link to the**

new conference. From the cloned conference request, a user can edit the information to suit their needs.



Note: Only conference request that are approved on the annual plan can be copied

E. Connecting a Conference Request with an Annual Conference

Users can connect an existing conference request with an existing annual conference by selecting the **Connect an Annual Conference button** located in the top right of the conference request page.

1. Navigate to the Conference Request

- a. Go to **Conference Requests** which is on the navigation header. This link will automatically take you to a list called **My Conference Requests**.
2. Select the **Connect an Annual Conference button**
3. The system will verify if there is an **Approved Annual Plan** associated with the **Agency and Fiscal Year** listed on the conference request. If there is no Approved Annual Plan found, the user will see the below message.

Connect an Annual Conference

There was no approved Annual Plan found for NASS 2030.

[Finish](#)

4. If the **current user has access to the Annual Plan**, the system will display a **dropdown field** where the user can select which **Annual Conference to connect to**. Once they complete the form, the **Conference Request** and **Annual Conference** will be **connected**.

Connect an Annual Conference

* Annual Conference Requests

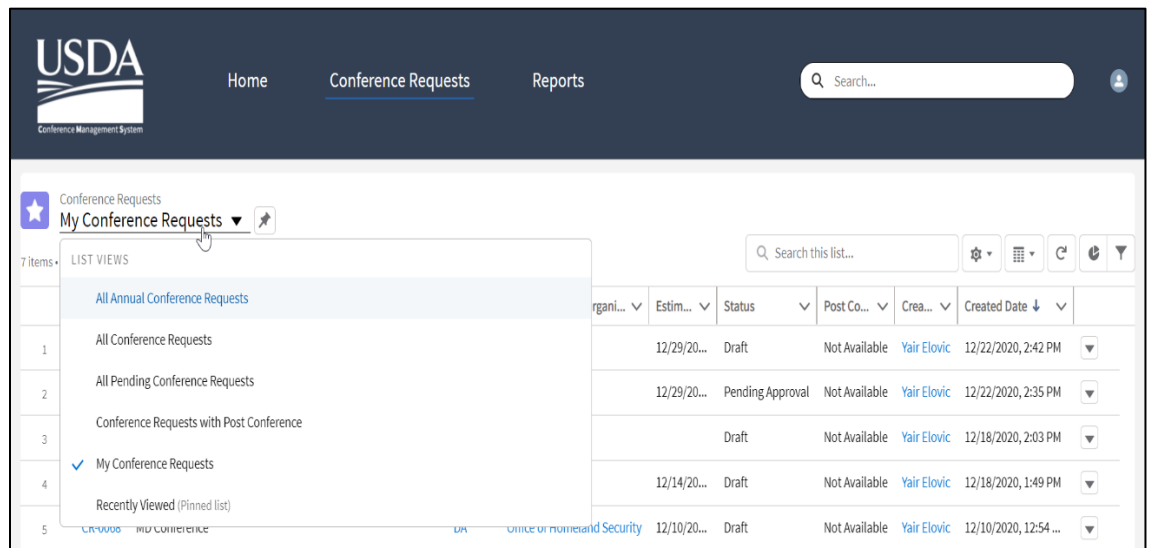
CR-12701 Water Resources Conference ▼

[Next](#)

F. Access Existing Conferences

1. Through Standard Navigation

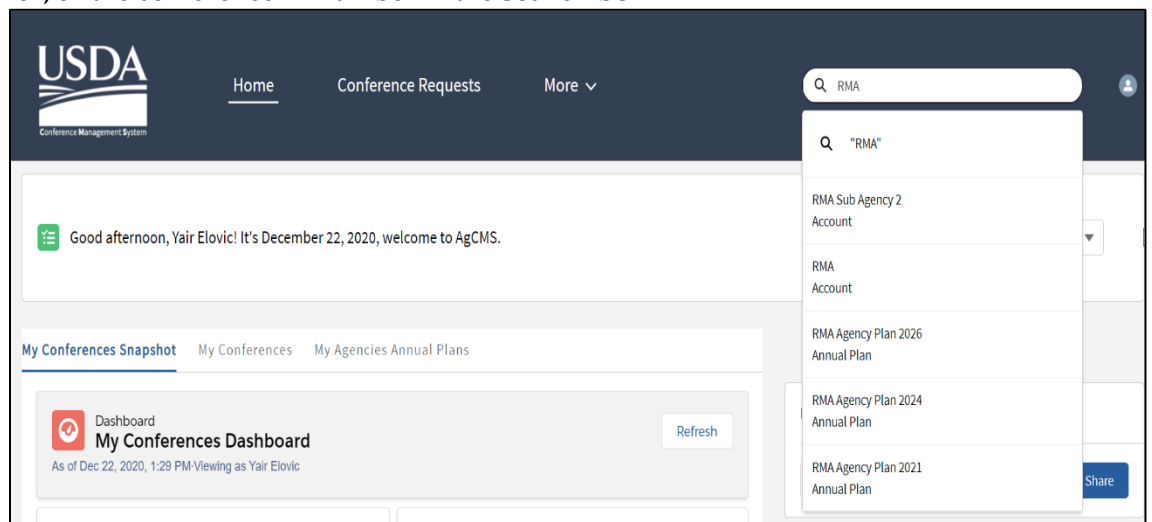
- a. Go to **Conference Requests** which is on the navigation header. This link will automatically take you to a list called **My Conference Requests**.
- b. The **My Conference Requests** List View will show list of conference requests created and submitted by the current user.
- c. Click on the **Conference Number** to open the conference.
- d. By clicking on **My Conference Requests**, the user will be able to navigate to other List Views to better filter on conferences as shown in the image below.



Note: List View are customized for each role it will allow user to see a filtered list of records, such as contacts, accounts etc.

2. Through Global Search

- Type the name of the conference, agency or sub agency that the conference was requested for, or the conference ID number in the **search box**.



- You will be able to see the top **five results** for your search term and you will be able to further filter on your search using the tools shown below.

The screenshot shows the USDA Conference Management System interface. The top navigation bar includes 'Home', 'Conference Requests', and 'Reports', along with a search bar and a user profile icon. The left sidebar contains a 'Search Results' section with a list of categories: All, Accounts, Contacts, Conference Requests, Annual Plans, and Conference Names. The 'All' category is selected. The main content area is divided into two sections: 'Accounts' and 'Conference Requests'. The 'Accounts' section shows 5 results sorted by Relevance, with columns for ACCOUNT NAME, PHONE, ACCOUNT OWNER ALIAS, and ACCOUNT RECORD TYPE. The 'Conference Requests' section shows 5+ results sorted by Relevance, with columns for CONFERENCE NUMBER, CONFERENCE NAME, REQUESTING AGENCY, REQUESTING SUB AGENCY, ESTIMATED START DATE, and ESTI. The 'All' category is selected in the sidebar.

ACCOUNT NAME	PHONE	ACCOUNT OWNER ALIAS	ACCOUNT RECORD TYPE
RMA Sub Agency 2		yelov	Sub Agency
RMA UAT SUB 2		wilwil	Sub Agency
RMA UAT SUB		wilwil	Sub Agency
RMA Primary		jillwedd	Sub Agency
RMA		yelov	Agency

CONFERENCE NUMBER	CONFERENCE NAME	REQUESTING AGENCY	REQUESTING SUB AGENCY	ESTIMATED START DATE	ESTI
CR-0129	A Community On Ecosystem Services Conference	RMA	RMA UAT SUB	12/29/2020	1/1/
CR-0119	Acquisitions Fundamentals of Project And Program Management Tral...	RMA	RMA Primary		
CR-0128	A Community On Ecosystem Services Conference	RMA	OA	12/29/2020	1/1/
CR-0115	State Office All Employee Meeting/Training	RMA	OA	12/21/2020	12/2
CR-0114	State Office All Employee Meeting/Training	RMA	OA	12/21/2020	12/2

c. On the **side panel** a user can continue to search until they find the conference that they are looking for.

The screenshot shows the USDA Conference Management System interface with the search results refined to 'Conference Requests'. The left sidebar now has 'Conference Requests' selected, and it includes an 'Expand List' button and a 'Refine By' section with various filters: Conference Number, Conference Name, Requesting Agency, Requesting Sub Agency, Estimated Start Date, Estimated End Date, Annual Plan, and Record Type. The main content area shows 14 results sorted by Relevance, with columns for CONFERENCE NUMBER, CONFERENCE NAME, REQUESTING AGENCY, REQUESTING SUB AGENCY, ESTIMATED START DATE, and ESTI. The 'Conference Requests' category is selected in the sidebar.

CONFERENCE NUMBER	CONFERENCE NAME	REQUESTING AGENCY	REQUESTING SUB AGENCY	ESTIMATED START DATE	ESTI
CR-0129	A Community On Ecosystem Services Conference	RMA	RMA UAT SUB	12/29/2020	1/1/2
CR-0119	Acquisitions Fundamentals of Project And Program Management Tral...	RMA	RMA Primary		
CR-0128	A Community On Ecosystem Services Conference	RMA	OA	12/29/2020	1/1/2
CR-0115	State Office All Employee Meeting/Training	RMA	OA	12/21/2020	12/2
CR-0114	State Office All Employee Meeting/Training	RMA	OA	12/21/2020	12/2
CR-0109	State Office All Employee Meeting/Training	RMA	OA	12/21/2020	12/2
CR-0111	State Office All Employee Meeting/Training	RMA	OA	12/21/2020	12/2
CR-0110	Zoological Association of America Conference	RMA	OA	1/4/2021	1/8/2
CR-0117	World Wilderness Congress Conference	RMA	OA	12/29/2020	12/3
CR-0116	World Wilderness Congress Conference	RMA	OA	1/25/2021	1/28
CR-0112	Zoological Association of America Conference	RMA	OA	1/4/2021	1/8/2
CR-0113	Farm Loan Programs-Program Technician (FLPPT) Training	RMA	OA		
CR-0108	World Wilderness Congress Conference	RMA	OA	12/29/2020	12/3
CR-0107	World Wilderness Congress Conference	RMA	OA	12/29/2020	12/3

d. Once you have found the conference you are looking for, click on the **conference request number** and the **conference request** page will open. All conferences have the **conference number** and **status** prominently displayed.

e. A submitter can view the routing workflow details by navigating to the **Conference**

Approvals tab. Only POCs, OCFO, and approvers will see the approval component on the right-hand side of the screen. Before is the screenshot approvers will see.

The screenshot shows the USDA Conference Management System interface. At the top, there is a navigation bar with 'Home', 'Conference Requests', and 'Reports'. A search bar is on the right. Below the navigation bar, the main content area displays a conference request titled 'District Director (DD) Meeting/Training'. The request details include: Conference Number (CR-0134), Annual Conference, Requesting Organization (FSA), Requesting Sub Organization (Management Services Division), Status (Complete), and Post Conference Status (Completed). A progress bar shows the stages: Draft, Pending Approval, Approved, Rejected, Need Additional Information, and Complete. The 'Approvals' tab is selected, showing a table of three approvals:

Approval Name	Status	Reviewer	Reviewer Comments
SATO/Agency Head Approver	Approved	UAT Agency Head	
Agency Approver 2	Approved	UAT Approver 2	all good
Agency Approver 1	Approved	UAT Approver1	everything looks good

G. Deleting Existing Conferences

Users can delete a Conference Request if they are the current owner of the record.

- 1. **Navigate to an existing Conference Request**
- 2. Select the **Change Owner** button and change the owner of the Conference Request to the current user.

The 'Change Owner' dialog box is shown. It has a title bar 'Change Owner'. Below the title bar is a search input field containing 'Test OCFO'. Below the search field is a checkbox labeled 'Send notification email' which is checked. At the bottom right of the dialog are two buttons: 'Cancel' and 'Submit'.

- 3. Select the **Delete** button to delete the Conference Request. The system will prompt the current user with a confirmation screen. User will select **Delete**.

Delete Conference Request

Are you sure you want to delete this Conference Request?

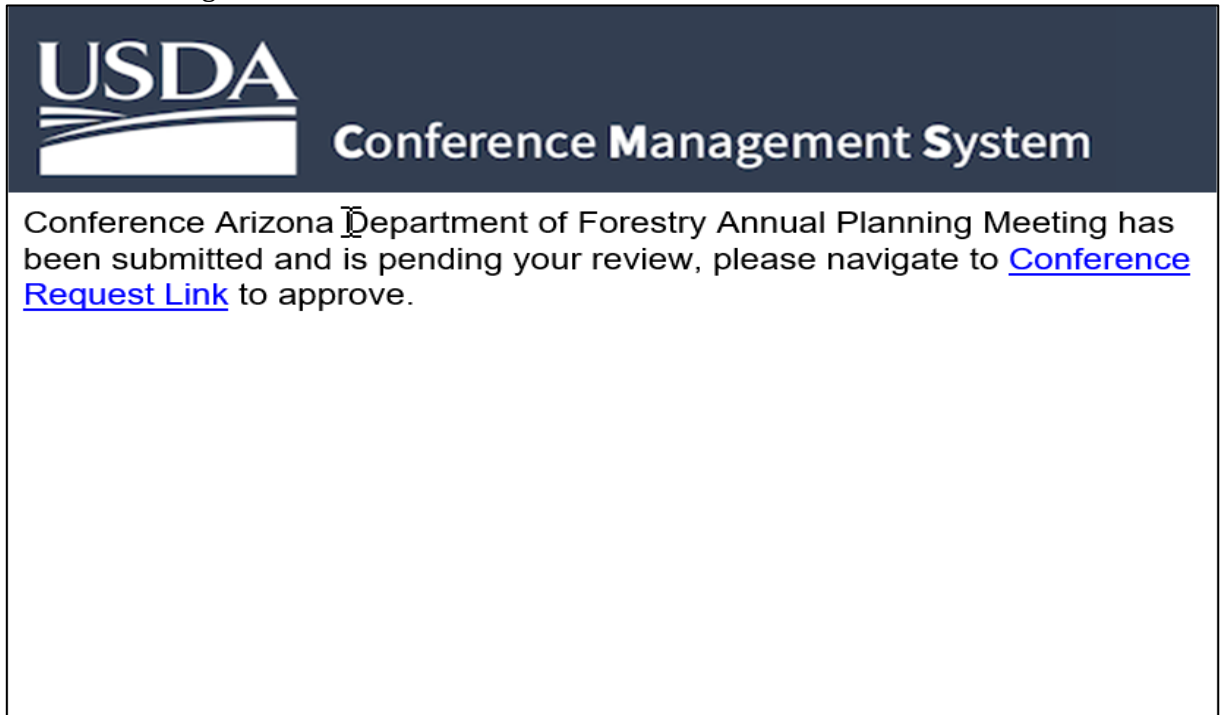
Cancel

Delete

V. Conference Routing

A. Decision Page

1. Routing is triggered once the submitter clicks on **Submit for Review**. The first approver in the routing list for the sub agency entered in the conference request receives an email notification. This email contains a link to the conference that has been submitted. A user can navigate to this conference using this link from the email which can be seen below.



***Note:** The system will send automated emails (with a link to the conference) to an approver every 48 hours until he/she enters a decision, and the conference moves out of his/her queue.*

2. Users can access conferences pending their approval from the following component on the right-hand side of the home page.
3. The **Pending Approvals tab** shows conferences that are pending for the current user. The blue link will take the user directly to the conference request.
4. The **Upcoming Reviews tab** shows the current users upcoming request approvals. These are not currently pending the current user's review. They will require attention from the user in the future.

USDA
Conference Management System

Home Pending Conference Requests More

Search...

Good morning, UAT Approver! It's January 14, 2021, welcome to AgCMS. Select an Action

Dashboard
Conferences Overview Dashboard
As of Jan 13, 2021, 11:33 AM Viewing as UAT Approver Refresh

Conference Status Overview

Sum of Approval Order

156

15 8 133

Status

- Unavailable
- Pending
- Approved

View Report (Dashboard: Conference Approval Overview)

Conference Requests per Agency

Record Count

AMS FS FSA NASS

Status

- Draft
- Pending Approval
- Complete
- Approved on Annual Plan
- Removed By Agency
- On Annual Plan

View Report (Dashboard: Requests per Sub Agency)

Conference Approvals Annual Plan Approvals Feed

Pending Conference Approvals Upcoming Conference Approvals

Conferen...	Conference Name	Days Pending
CR-0200	Icon - Native American Advisory Committee (NAAC) Meeting	4
CR-0202	Good Food Expo Conference	4
CR-0187	Conservation Training	4
CR-0186	National Geospatially Enhanced Acreage Reporting (GEAR) Training	1
CR-0188	National Native Seed Conference	1
CR-0212	Northeastern Association of State Department of Agriculture Conference	3

5. Clicking on the conference number takes the user to the **Review Decision** page, which consists of several sections
 - a. Conference Details
 - b. Conference Information
 - c. Attachments
 - d. Post Conference Details
 - e. Conference Approval
 - f. Conference Approval Component
 - This is where an approver, Agency POC, or OCFO user can input their approval decisions.
 - g. Chatter Feed
 - Gives the approver and submitter the ability to collaborate about the record.

USDA AgCMS Employee Portal

Home Conference Requests Annual Plans More

Search...

Conference Request
A Community On Ecosystem Services Conference

+ Follow Copy Conference Approval Change Owner

Conference Number	Annual Conference	Requesting Organization	Requesting Sub Organization	Status	Post Conference Status
CR-0128		RMA	OA	Pending Approval	Not Available

Draft Pending Approval Approved Rejected Need Additional Info. Complete

Conference Details Conference Information Attachments Post Conference Details Conference Approvals

Warnings and Alerts

Warnings

- This conference has a paid speaker. This will increase the scrutiny from oversight agencies.

Cost Calculations:

TOTAL DIRECT COSTS (W/O SALARIES) Less salaries and benefits.	\$1,000.00
TOTAL SALARY AND BENEFIT COST	\$0.00
USDA ATTENDEES USDA and non-USDA paid by agency.	2
TOTAL DAYS	4
COST PER ATTENDEE w/o salaries and benefits.	\$500.00
COST PER ATTENDEE PER DAY w/o salaries and benefits.	\$125.00

Conference Approvals

Bypass Active

Agency Approvals

Agency Approver 1
Approval Status: Pending
List of Approver(s):
• MATTHEW PHILLIPS

Agency Approver 2
Approval Status: Unavailable
List of Approver(s):
• MATTHEW PHILLIPS

Sort by: Most Recent Activity Search this feed...

6. **The Conference Details Tab:** will hold all the flags that have been activated by the information in the conference as well as the general financials of the conference request. The **Warnings and Alerts**, which are the same that appears to the submitter, indicates potential issues that could flag the request for approval. Red and orange alerts can be causes for disapproval or delays, i.e., in instances where the approver returns the request for revision or additional information. The **Cost Calculations** provides a high-level summary of the costs, including the number of conference days and attendees paid for by the agency. The conference is a high-cost event if the (1) **Cost per Attendee** is over \$3,000 or the (2) **Cost per Attendee per Day** is over \$600. *Note: The justification for a high-cost event should have been entered in the **Justification** field under the **General Conference Information** section.*
7. The Conference information tab will hold all the details that have been inputted in the conference request.

USDA Home Conference Requests Reports Search

Conference Request: U.S. Dairy Export Council Fall Meeting (USDEC)

Conference Number: CR-0137 | Annual Conference: PSA | Requesting Organization: Management Services Division | Status: Draft | Post Conference Status: Not Available

Progress: Draft (selected) | Pending Approval | Approved | Rejected | Need Additional Information | Complete

Conference Request | **Conference Information** | Conference Approvals | Chatter | Post Conference Details | Attachments

GENERAL CONFERENCE INFORMATION

Conference Name: Virtual Task Force/Strike Team Leader Training

Status: Draft

Roles: Host(s)/sponsor(s)

Event Type: Conference

Country: United States of America

State: Florida

City: Orlando

Estimated Start Date: 1/9/2021

Estimated End Date: 1/19/2021

Purpose: Food inspection conference to review annual financial report

Justification: Food inspection conference to review annual financial report

Recurring Event:

Recurring Event Frequency: 5

Continuing Professional Education?: No

Will your agency be hosting a booth?: Yes

Does This Meet Definition of Conference?: Yes

Will Multiple Agencies be Attending?:

SPONSORING AGENCY INFORMATION

Steps to Minimize Lodging: negotiating a rate below per diem

Upgraded Rooms are Included:

Justification for Upgraded Rooms: Upgraded rooms are part

Additional Meeting Rooms:

Additional Meeting Rooms Justification: Additional meeting rooms are being provided

Outside Conference Planning:

Outside Conference Plan Justification: Outside conference planning services

Scouting Trips will be Utilized:

Scouting Trips Justification: Scouting trips will be used when arranging

After Hours/Networking Event or Parties:

Justification for After Hours Event: After hours events, networking sessions, or parties will be officially organized

Alcohol Will Be Provided:

Outside Conference Planning:

> CONFERENCE JUSTIFICATION

> CONFERENCE SPONSORSHIP INFORMATION

> REQUESTOR INFORMATION

> OVERALL ATTENDEE INFORMATION

> FACILITY INFORMATION AND JUSTIFICATION

> ACCOUNTING INFORMATION

> OVERALL COST SECTION

8. The **Attachments** allows approvers to see the documents uploaded by the submitter during the conference request data entry process. Additionally, approvers can upload documents to the conference request on this tab.

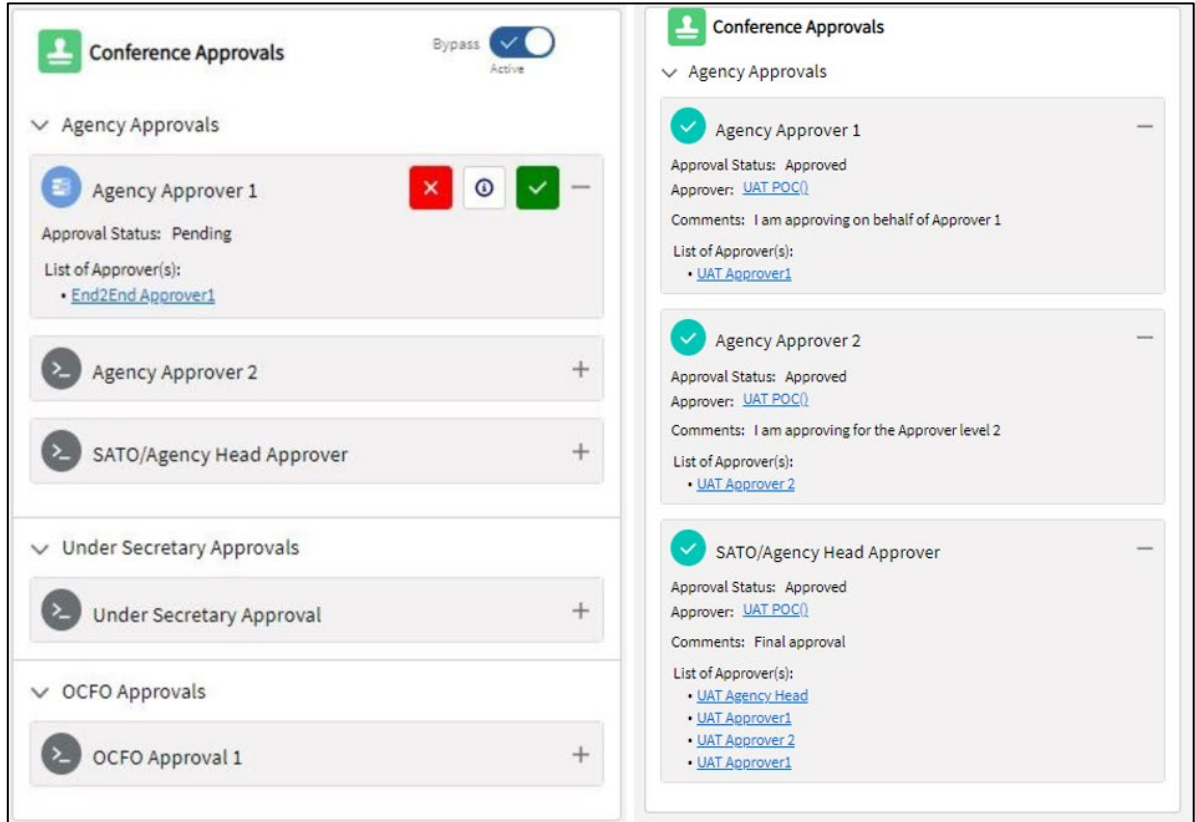
Conference Details | Conference Information | **Attachments** | Post Conference Details | Conference Approvals

Files (3) Add Files

Title	Owner	Last Modified	Size
UAT Demo	UAT_Submitter	1/14/2021, 10:30 AM	173KB
AgCMS Functions per role ...	UAT_Submitter	1/14/2021, 10:26 AM	19KB
Pre Production Action Ite...	UAT_Submitter	1/14/2021, 10:22 AM	10KB

[View All](#)

9. **Post Conference Details tab** will be blank until the conference is ready for post conference details input. It will be available for input on the conference's end date.
10. **The Chatter** component can be used to collaborate with users by typing your comments in the feed on the right-hand side.
11. **The Conference Approval component** will be used to approve, deny or send back a conference request. To **Approve**, click the green check box, to **Reject** select the red X button and to **request more information** click the 'i' icon. The system will prompt the user to add comments regardless of the decision. The page will display the same Conference Approval component whether a user is on a computer or mobile device.



B. Decision Workflow

1. When the first approver approves the conference request, it routes to the second approver for review, and so on. The process is repeated for the subsequent approvers until the request reaches completion when approved by the final approver. Once the record has been approved, the Submitter, Agency POC, and OCFO user will receive an email notification regarding this decision. s



Conference Management System

Conference CR-12960 has been approved.

To view approval notes navigate to the following link: [Conference Request Link](#)

2. When an approver at any level rejects the request, the routing ends, and the conference request's status changes from "Pending" to "Rejected." The conference is now unable to be resubmitted for approval. If the user would like this conference request to enter the approval process, the user should copy the conference request and resubmit the conference request for approval.
3. When an approver decides that the conference needs corrections, he/she selects the **Need Additional Information** "i" button. The request is routed back to the submitter, who receives an email notification containing the conference number and a hyperlink to the conference.



Conference Management System

Conference CR-0063 has been returned and required additional information. Please navigate to [Conference Request Link](#) to provide the necessary information to avoid further delays

4. Clicking on the link takes the submitter directly to the conference request where edits can be made. Alternatively, the submitter can search for and access the conference, or they can see it on

their home page.

5. The submitter will make the necessary edits and submit the conference again. The routing and approval process restart from the beginning (i.e., first approver).
6. Conference data can only be edited by the submitter/owner of the record.

C. Conference Edit (Override)

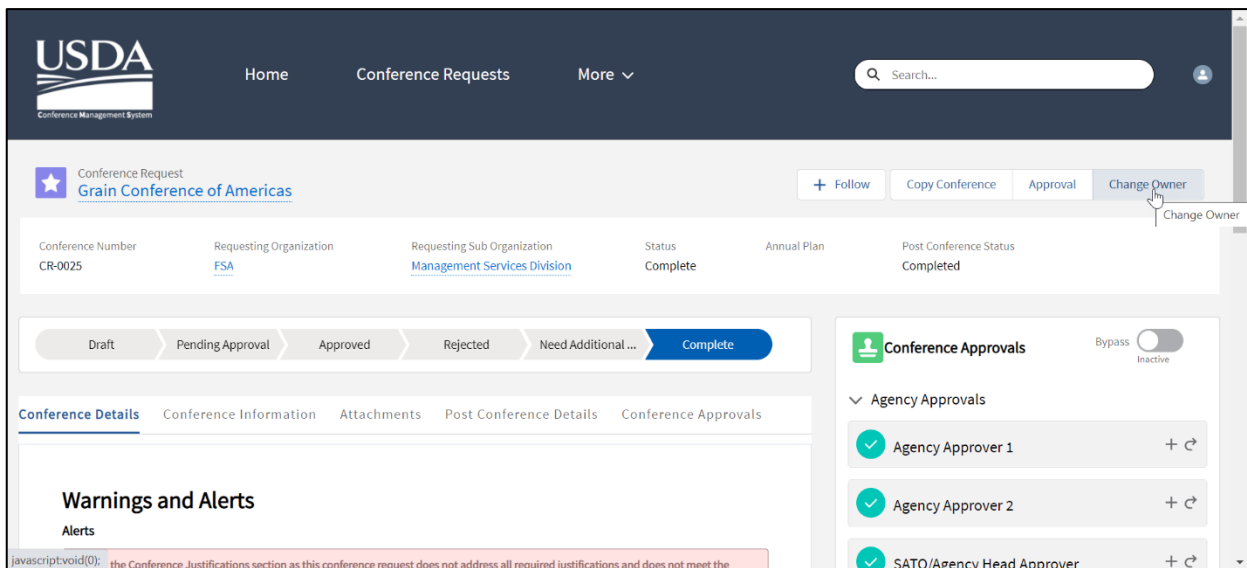
Agency POCs are able to edit conference data. To do so, the Agency POC can change the ownership of the conference to themselves. If the status of the conference is pending approval, the Agency POC will need to override approvals and select the Needs additional info button. This will cause the conference request to be classified as a Draft. If the Conference request already has a status of Draft, the Agency POC will be able to make the desired edits and submit the conference.

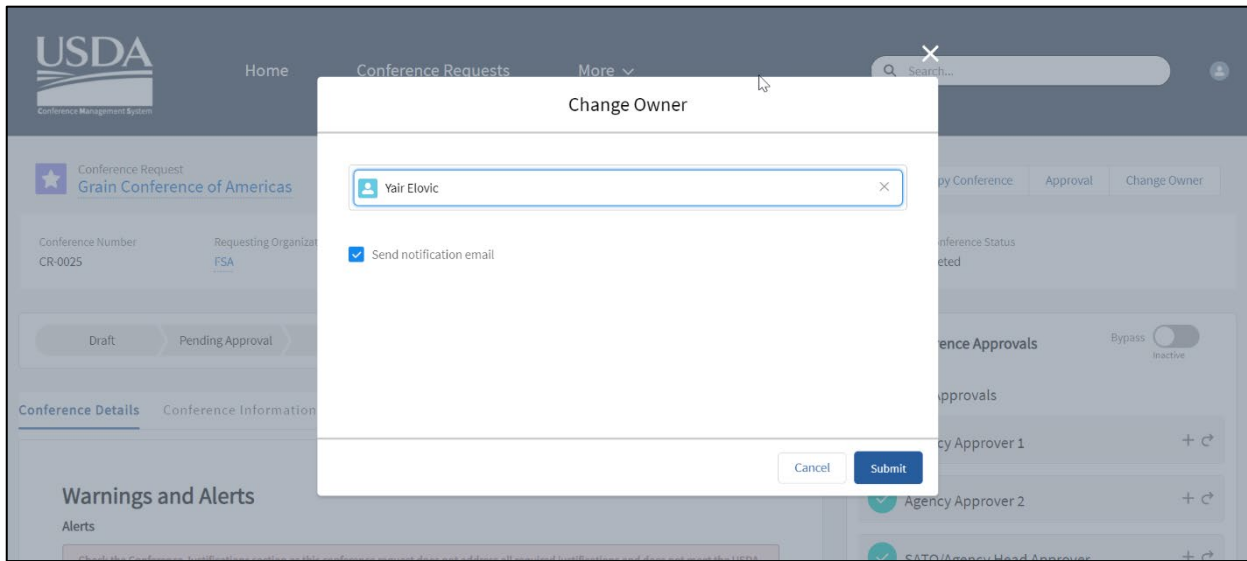
Note: Agency POCs can change the owner of any conference.

1. Change Ownership – Only the submitter can edit and submit a conference he/she created. Transferring ownership, which can be done multiple times to the same conference, reassigns the conference from one submitter to another to allow the new user to edit and submit the conference.

Note: This action can be utilized in situations where the original submitter left the agency either permanently or temporarily, which necessitates having another user take over. In the case of the latter, the conference can be reassigned back to the original submitter when he/she returns.

2. Click on **Change Owner** which will open a modal. Select the **User** the conference will be reassigned to and click on the **Submit** button.
 - a. This functionality can be used to change the owner of a conference to an Agency POC. Changing the owner of the conference request to an Agency POC will allow them to edit conference records. The Agency POC will have the ability to edit the conference if the status is **Need Additional Information** or **Draft**.





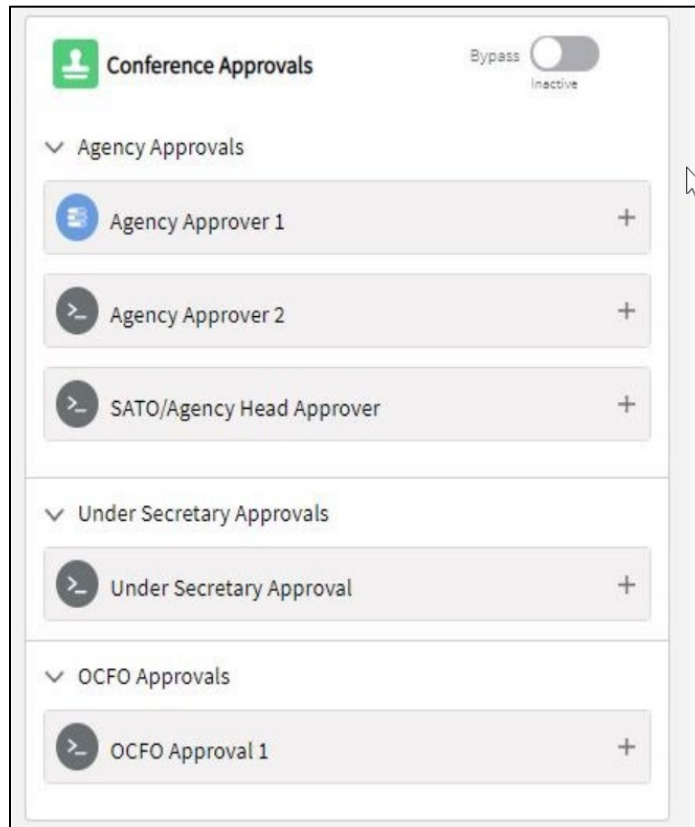
D. Conference Approval Bypass (Override)

When a conference is in Pending Approval status, the Agency POC can click the Bypass Approval toggle. After which, the buttons allowing the actions of Approve, Needs Additional Information, or Denial of the conference become available and the POC can now approve at that level on behalf of another.

1. **Pending Approval Conferences** – The POC can administratively approve the conference at the current approver only for Agency Approvals.

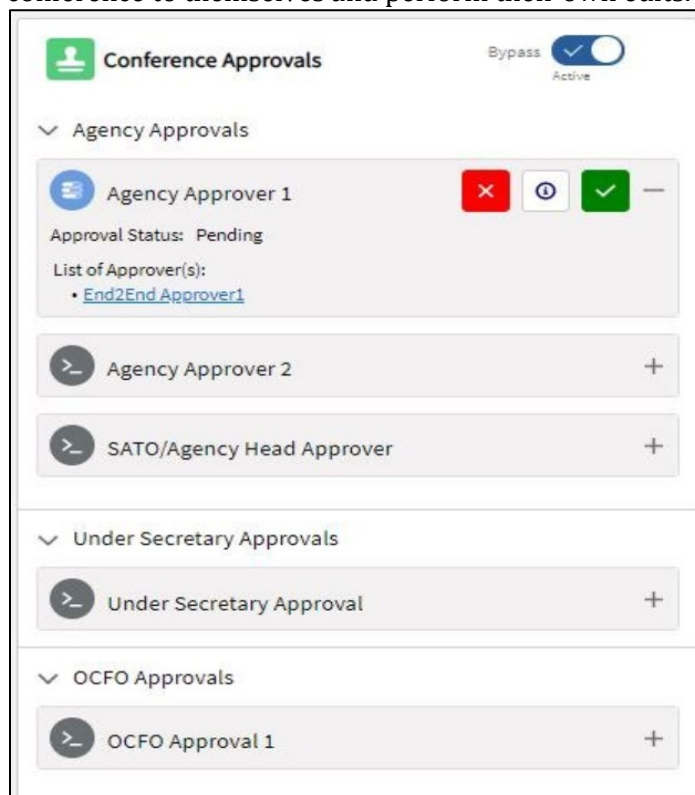
Note: The OCFO can administratively approve at all levels.

- a. To utilize the approval bypass functionality, an Agency POC can navigate to a conference that is pending approval, click the **“Bypass” Toggle** that is on top of the approval card.
- b. This allows the POC to view the approval decisions, Approve, Need Additional Information or Deny, for a conference.



2. Approved/Needs Additional Information/Rejected Conferences

- a. Once a decision has been made, an Agency POC or OCFO cannot change someone else's decision. They can only bypass approvals on **"Pending"** requests. If the conference is in **"Needs Additional Information"** status, an Agency POC can change the ownership for the conference to themselves and perform their own edits.

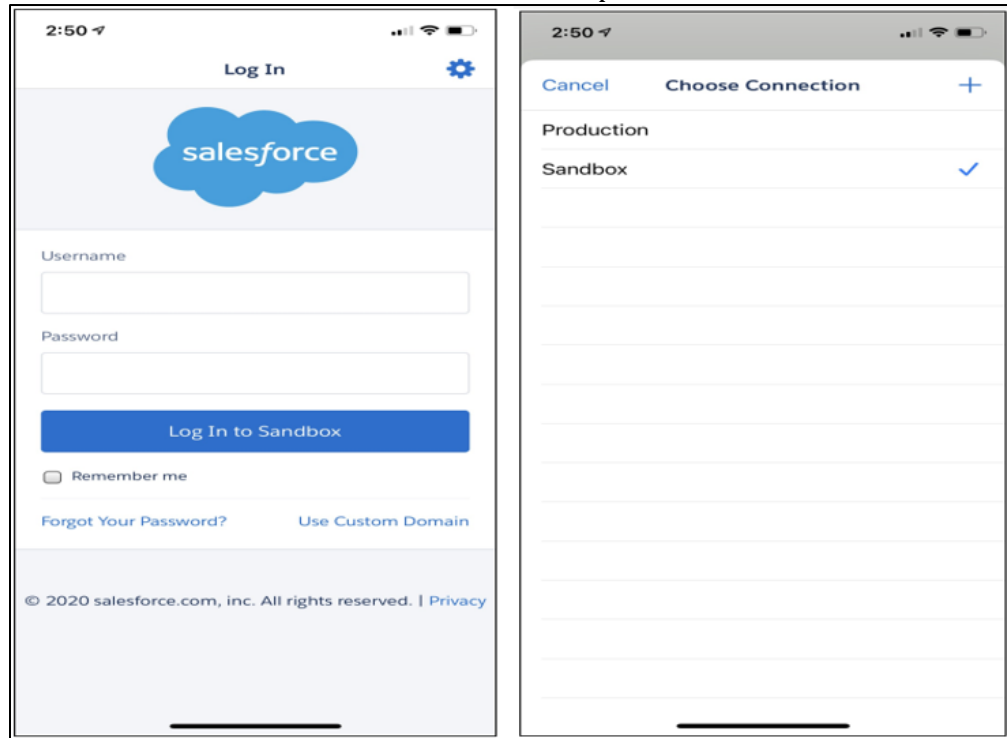


VI. Mobile Application

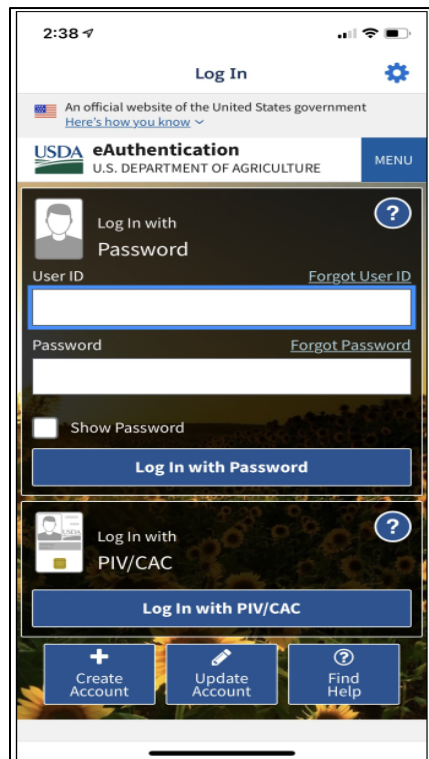
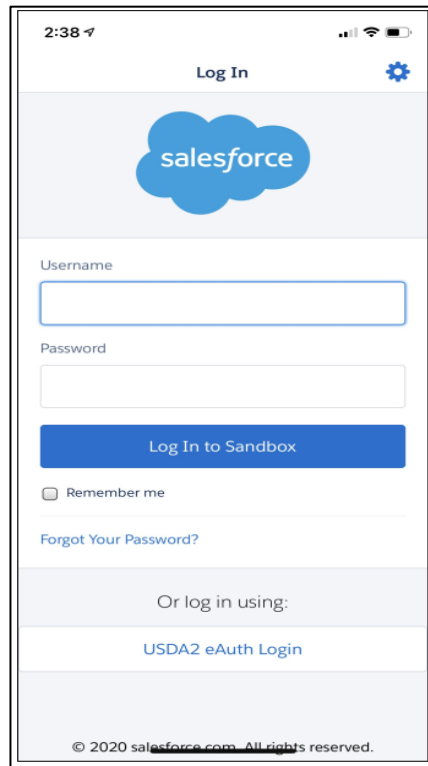
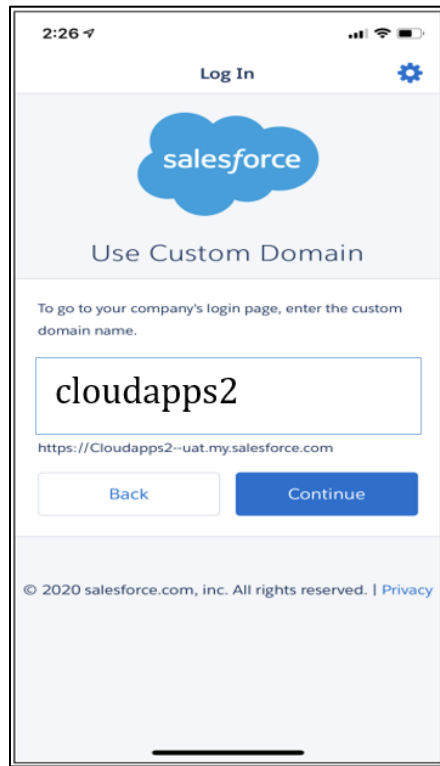
A. Mobile Log-in Instructions (Approvers)

AgCMS is also available as a mobile application for Approver users only. AgCMS was developed for USDA using the Salesforce platform. When accessing the mobile app, the icon reflects the Salesforce logo rather than the USDA logo. Please see the below for log-in and approval instructions within the mobile application.

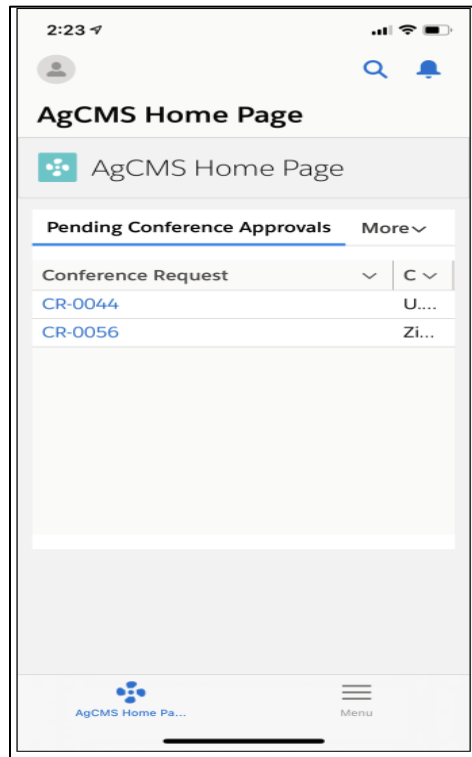
1. The Agency Approvers can log into the Salesforce mobile application to make an approval decision (**Approve/Reject/Needs More Information**) on the conference requests. When Approvers log in to the mobile app, they can see all pending conference approvals on the homepage dashboard. Approvers can review the conference details before entering a decision.
2. Follow the instruction below to access the AgCMS mobile version.
 - a. On your mobile device, Navigate to the AppStore/Play Store.
 - b. Search for **Salesforce** App and download it.
 - c. Open the **Salesforce** App.
 - d. Click on the **Gear** Icon and Select **Production** option.



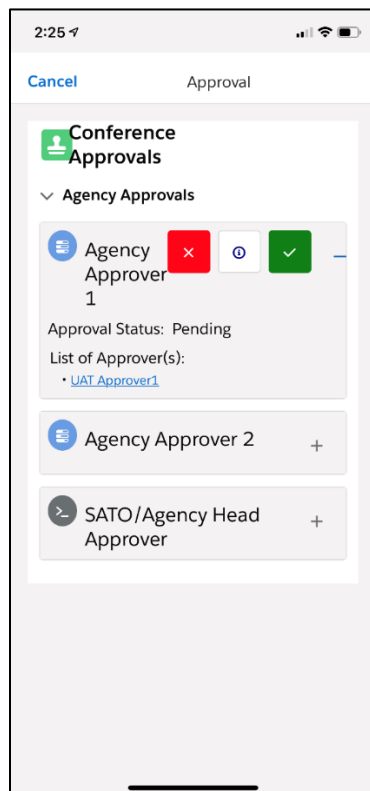
- e. Tap on the **Use Custom Domain** link on the home page.
- f. On the Custom Domain Field enter "cloudapps2".
- g. Click on **Continue**
- h. Select the **USDA eAuth Login** button
- i. Enter your **USDA credentials** and click **Log in with Password**



j. The Pending Conference Approvals should be displayed.



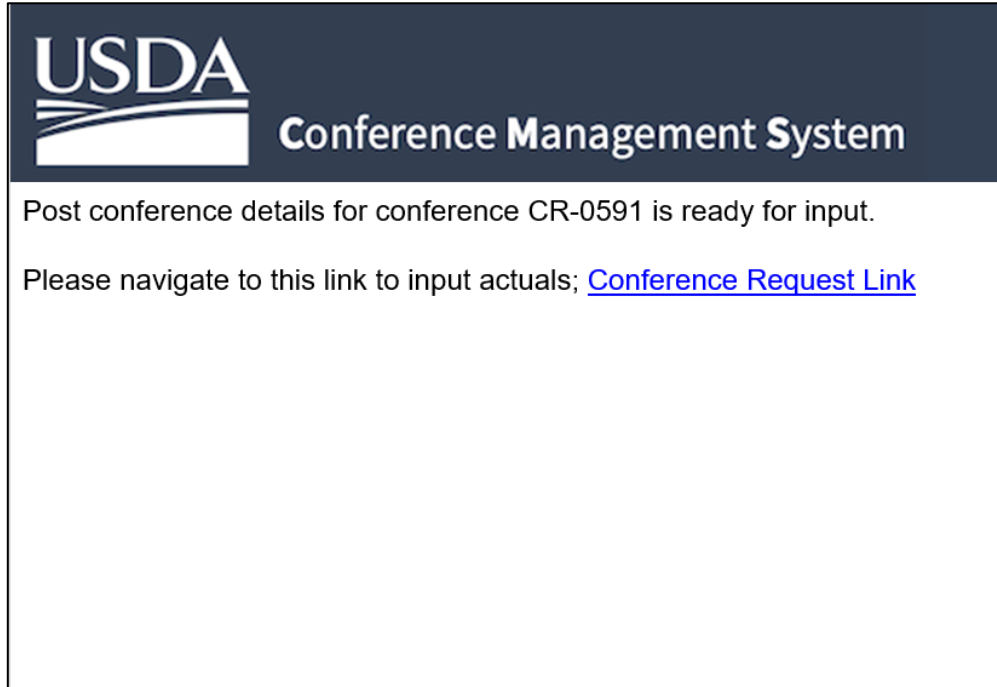
- k.** Tap on a **Conference Request Number** to access the specific conference request.
- l.** Scroll down to review the information within each tab (**Approvals, Attachments, Review Details, Conference Information**).
- m.** Select the **Approval** button at the top of the page.
- n.** The approver will be navigated to the Agency Approvals section. Select the button corresponding to the decision: **Reject, Needs More Information, or Approve**



VII. Conference Transparency Reporting

A. Post Conference Details

1. Select fields from approved conference requests are mapped onto the **Post Conference Details** page. This information can be used to satisfy the quarterly conference transparency reporting (CTR) requirements to OCFO. Only the submitter or conference owner can update the post conference data (i.e., actual number of attendees and expenses) and must do so after event completion.
2. **Post Conference Details** are available after the conference has been approved. The submitter will receive the below email, one day after the **Estimated End Date** of the Conference Request. They will receive additional email notifications, 10 and 20 days after the **Estimated End Date** if they do not complete the Post Conference Details by those intervals:



3. Go to **Conference Requests** → **Conference Requests with Post Conference** and click applicable conference number. Conferences that are available for post conference entry are indicated by "Ready" in the **Post Conference Status** column.
4. Click on the **Post Conference Details** tab and enter the applicable numbers and amounts in the **Actual** column, from **Agency Participants** to **Salary Costs**. All other fields are auto calculated.
5. The following will prompt a text box for entering justifications:
 - a. Variance: When there is a 15% or more difference between total direct cost
 - b. Mission Impact: When the event is hosted or sponsored, and the **Total Direct Costs** is over \$100,000.
 - c. High cost: **Cost per Person** is over \$3,000 or **Cost per Person per Day** over \$600.
6. Click on the **Submit Conference Details** button to save any changes

Participants and Cost Details			
	ACTUAL		CONFERENCE REQUEST
AGENCY PARTICIPANTS	444		444
NON-USDA PARTICIPANTS PAID BY AGENCY	0		0
TRAVEL EXPENSES	\$333,333,333.00		\$11,233.00
A/V COSTS	\$3,333.00		\$3,455.00
FOOD AND BEVERAGE COSTS	\$0.00		\$0.00
OTHER COSTS	\$0.00		\$0.00
SALARY COSTS	\$3,333.00		\$233.00
TOTAL DIRECT COSTS		\$333,339,666.00	\$14,668.00
NUMBER OF PEOPLE	444		444
NUMBER OF DAYS	1		1
COST PER PERSON		\$750,750.00	\$33.08
COST PER PERSON PER DAY		\$750,750.00	\$33.08
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Explanation of High Cost Event</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 30px;"> High Cost Conference </div> </div>			
<div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p>Explanation of 15% or greater variance from actuals to estimated.</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 30px;"> Miscalculated expenses </div> </div>			

Note: Only the owner of the request can edit it.

7. A **Post Conference Report** is available under the USDA AgCMS reports folder. The title of the report is Post Conference Report.

B. Quarterly Agency Post Conference Details

1. Once a post conference expense record has completed, the record will be rolled up into a Quarterly Agency Post Conference record based on its agency, quarter and fiscal year. These Quarterly Agency Post Conference records can be accessed from the Agency POC's dashboards. Please note that the POC will only see Agency Quarterly Post Conference Records on their dashboard.
 - a. Agency POC Dashboard

Good afternoon, Test POC! It's March 23, 2021, welcome to AgCMS. Select an Action

Dashboard
Conferences Overview Dashboard
 As of Mar 23, 2021, 10:55 AM-Viewing as Test POC
 Requesting Organization: All

Conference Requests per Agency
 Record Count: Approved, Complete
 Dashboard: Conference Requests Actuals ...
 Measure: Sum of Total Cos...

My Annual Plans **Post Conference...** Feed
 POC CTR Fiscal Year: 2021 - Current FY
 Report Name Agency Status
 2021 Q1 OASCR CTR# OASCR Ready For Review
 2021 Q1 RD CTR Appr RD Ready For Review
 2021 Q1 AMS CTR Appr AMS Ready For Review

USDA Home Conference Requests Agencies More

AgCMS Post Conference Reporting
2021 Q3 AMS CTR Approval + Follow Agency CTR Report CTR Missed Deadline

Agency: AMS Fiscal Year: 2021 Quarter: Q3 Status: Ready For Review

Unavailable **Ready For Review** POC Review SATO Approval Pending OCFO Approval Approved CTR Did Not Meet Deadline

[Start POC Review](#)

Completed Actuals: 3 **Count of Attendees:** 116 **Total Costs:** \$25,004.00 **All Conferences this Qtr: 4** **Incomplete Post Conferences: 1**

Completed Actuals Reporting Details Approval History Incomplete Post Conference List Chatter

N	Conference Name	Start Date	End Date	Agen...	City	State	Total...	Cost ...	CTR ...
CR-438C	Produce Marketing Association Fresh Summit 2020	Oct 13, 20...	Oct 17, 20...	16	Dallas	Texas	\$25,000.00	\$1,562.50	On CTR
CR-1146	World Environmental & Water Resources Congress	Mar 27, 20...	Mar 28, 20...	99	N/A	Virtual Co...	\$0.00	\$0.00	On CTR
CR-1151	International Advances in Arachis through Genomics and Biotechnology (AAGB) Conf	Apr 4, 2021	Apr 6, 2021	1	N/A	Virtual Co...	\$4.00	\$2.00	On CTR

2. Clicking into a Quarterly Agency Post Conference record will display the following sections:
 - a. Approval Path
 - b. Start POC Review button
 - c. Agency Post Conference Data Breakdown
 - d. Completed Actuals
 - e. Reporting Details
 - f. Approval History
 - g. Incomplete Post Conference List
3. **The Approval Path** will display what stage of the workflow process the record is currently in.
 - a. Unavailable
 - The previous quarter's record has not been approved. POC is unable to begin the approval process on the Quarterly Agency Post Conference Reporting record if the previous quarter's record does not have the status of **Approved** or **CTR Did Not Meet Deadline**.

- b. Ready For Review
 - This record is ready for approval and the Agency POC can select the **Start POC Review** button to begin the process.
 - While the record has the status of **Ready for Review**, Conference Expense and Conference Request records will continue to roll up into the record under the **Completed Actuals** and **Incomplete Post Conference Lists** respectively.
- c. POC Review
 - The Agency POC has selected the **Start POC Review** button and the approval is in process.
 - Conference Expense and Conference Request records can no longer be rolled up into the current conference.
 - If a Conference Expense record is completed for the current fiscal year, quarter, and Agency while the Post Conference Reporting record is in an approval process, the Conference Expense record will be rolled up into the subsequent Quarterly Agency record.
- d. SATO Approval
 - The Agency POC has selected the green Approve button and the record is pending a decision from the SATO.
- e. Pending OCFO Approval
 - The SATO has selected the green Approve button and the record is pending a decision from the OCFO.
 - Once the record enters the status of Pending OCFO Approval, the post conference expense records will be rolled up to the Quarterly USDA Post Conference Details record where the OCFO will continue the approval process and make their approval decision at the Quarterly USDA Level record.
- f. Approved
 - The OCFO has started the approval process at the USDA Quarter level and has selected the green Approve button. The Conference Expenses at the Quarterly Agency level will reflect this by having a status of **Approved on CTR**.
- g. CTR Did Not Meet Deadline
 - The OCFO can designate the status of the Quarterly Agency record as **CTR Did Not Meet Deadline** if they would like to continue the approval process at the USDA Quarter level without including this Quarterly Agency record.
 - Conference Expenses that were included in a Quarterly Agency record with a status of **CTR Did Not Meet Deadline** will be rolled up into the subsequent quarter.



4. Start POC Review Button

- a. The Start POC Review Button will allow the Post Conference record to begin the approval process. Only an Agency POC can select this button.



5. The Completed Actuals section will display Completed Conference Expense records that meet the below criteria.

- a. Agency
 - The Agency listed on the Quarterly Agency record must match the Agency on the Conference Expense record
- b. Fiscal Quarter

- The **Estimated Start Date** of the Conference Requests tied to the Conference Expense records must align with the fiscal quarters.
 - Q1: Previous Year 10/1-12/31
 - Q2: Current Year 1/1-3/31
 - Q3: Current Year 4/1-6/30
 - Q4 Current Year 7/1-9/30
- c. Previous Completed Actuals records where the Status of the Quarterly Agency Level record has a status of **CTR Did Not Meet Deadline**
- d. CTR Reporting Start Date Field
- The **Estimated Start Date** of the Conference Requests tied to the Conference Expense records must be before the value listed in the **CTR Reporting Start Date Field**.
 - The field can be found by selecting the **Reporting Details tab** on a Post Conference Reporting Record.

Completed Actuals							
N.	Conference	Start Date	Agency Participants	Total Direct Cost	Cost Per Person	CTR Status	
CE - 113	National Good Food Network Food Hub Conference	Mar 29, 2021	8	\$19,878.80	\$2,484.85	On CTR	
CE - 103	Global Food Safety Initiative Conference	Mar 5, 2021	1	\$6,027.93	\$6,027.93	On CTR	
CE - 113	Tuskegee University School of Veterinary Medicine 51st Annual Veterinary Medical Sym...	Mar 30, 2021	3	\$5,945.91	\$1,981.97	On CTR	
CE - 103	Agricultural Outlook Forum 2021 (94th)	Feb 22, 2021	4	\$5,250.00	\$1,312.50	On CTR	
CE - 113	IBM CONNECT ED CONFERENCE	Jan 31, 2021	1	\$4,896.76	\$4,896.76	On CTR	
CE - 104	2021 Society for Range Management (SRM) Winter Meeting - Arizona Section	Jan 3, 2021	10	\$3,839.00	\$383.90	On CTR	
CE - 105	Southeast Regional Fruit and Vegetable Conference	Jan 11, 2021	3	\$3,452.50	\$1,150.83	On CTR	
CE - 101	Council for Affordable Rural Housing Training	Feb 5, 2021	14	\$2,434.78	\$173.91	On CTR	
CE - 104	North American Raspberry and Blackberry Association Conference	Feb 21, 2021	1	\$1,890.00	\$1,890.00	On CTR	
CE - 103	American Seed Traders Association Vegetable & Flower Seed Conference	Jan 26, 2021	1	\$1,540.00	\$1,540.00	On CTR	
CE - 104	Southern Sustainable Agriculture Working Group Conference	Jan 17, 2021	1	\$1,404.46	\$1,404.46	On CTR	
CE - 102	National Association of Credit Specialists (NACS) Board Meeting	Feb 1, 2021	0	\$1,159.88		On CTR	
CE - 923	Beltwide Cotton Conferences	Jan 5, 2021	6	\$1,100.00	\$183.33	On CTR	

6. Agency Post Conference Data Breakdown

- a. This will display applicable information about records that have been rolled up to this current record.
- Completed Actuals
 - Count of Attendees
 - Total Costs
 - All Conferences this Quarter
 - Count of Incomplete Post Conferences

 Completed Actuals: 25	 Count of Attendees: 85	 Total Costs: \$64,635.13	All Conferences this Qtr: 26 Incomplete Post Conferences: 1
---	--	--	--

7. Reporting Details

- a. The Reporting Details section will display certain pieces of information about the record including:
- Post Conference Reporting record name
 - Fiscal Year
 - Agency Name
 - Fiscal Quarter

- CTR Reporting Start Date
- Type of Post Conference detail record
- Link to the USDA Quarter record

Completed Actuals	Reporting Details	Approval History	Incomplete Post Conference List
AgCMS Post Conference Reporting Name		Fiscal Year	
2021 Q2 AMS CTR Approval		2021	
Agency		Quarter	
AMS		Q2	
Record Type		Status	
Agency Quarterly Approval		Ready For Review	
USDA Quarter Approval			
2021 Q2 USDA CTR Approval			
Quarter Start Date			
1/1/2021			
Quarter End Date			
3/31/2021			
CTR Reporting Start			
7/1/2020			
Previous Quarter			
2021 Q1 AMS CTR Approval			

8. Approval History tab

- The Approval History tab will display the approval process steps that have occurred for the record.

Completed Actuals	Reporting Details	Approval History	Incomplete Post Conference List	
CTR Approvals (2) 2 Items • Updated a few seconds ago				
<input type="checkbox"/> CTR Approval Type	Reviewer	Status	Reviewer Comments	Decision Timestamp
1 <input type="checkbox"/> POC Review	Test POC	Approved	POC Review is Approved	3/18/2021, 12:44 PM
2 <input type="checkbox"/> SATO Approval	Test SATO	Approved	SATO Approval is Approved	3/18/2021, 2:14 PM

9. Incomplete Post Conference List will display Conference Requests that have been **Approved** but do not have a **Completed** Conference Expense record associated with it.

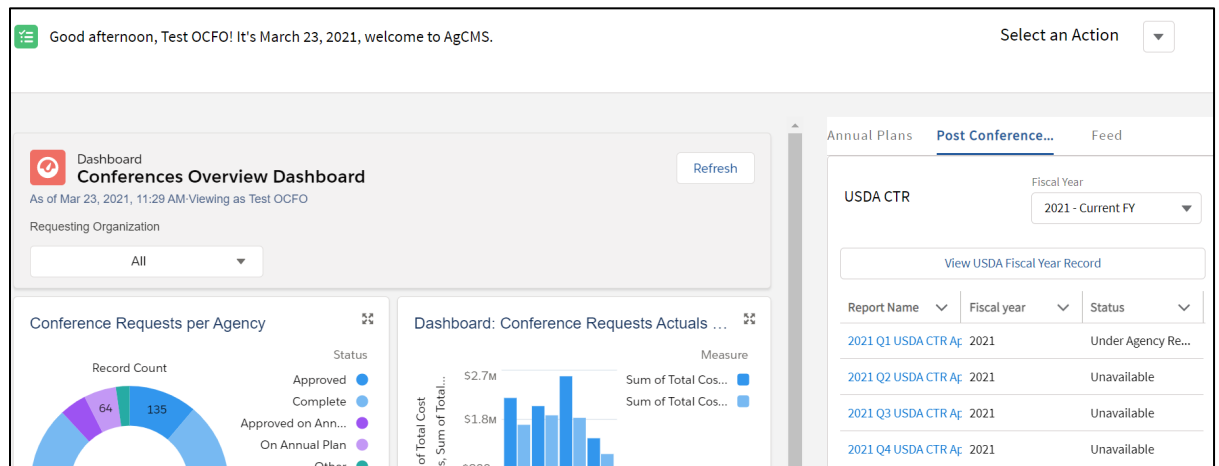
- Agency
 - The Agency listed on the Quarterly Agency record must match the Agency on the Conference Expense record
- Fiscal Quarter
 - The **Estimated Start Date** of the Conference Requests tied to the Conference Expense records must align with the fiscal quarters.
 - Q1: Previous Year 10/1-12/31
 - Q2: Current Year 1/1-3/31
 - Q3: Current Year 4/1-6/30
 - Q4 Current Year 7/1-9/30

Completed Actuals Reporting Details Approval History <u>Incomplete Post Conference List</u>				
Incompleted Post Conference Conferences				
N. ▾	Conference ▾	Start Date	Sub Agency ▾	Post Conference Status
CR-1203	National Grain & Feed Association Country Elevator Conference and Trade Show	Dec 8, 2020	AMS Demo	Ready
CR-1204	World Food Prize Meeting	Oct 16, 2020	AMS Demo	Ready
CR-1204	PHS/FDA National Conference on Interstate Milk Shipments (NCIMS) 2020 EASTERN MIL...	Oct 28, 2020	AMS Demo	Ready
CR-1204	International Advances in Plant Virology	Oct 29, 2020	AMS Demo	Ready
CR-1204	North Carolina Veterinary Conference	Nov 1, 2020	AMS Demo	Ready
CR-1204	National Institute for Animal Agriculture Symposium on Antibiotics	Oct 15, 2020	AMS Demo	Ready
CR-1205	GeoVet	Oct 8, 2020	AMS Demo	Ready
CR-1205	ICS 300/400	Oct 21, 2020	AMS Demo	Ready
CR-1205	Conference of Research Workers in Animal Diseases (CRWAD)	Nov 2, 2020	AMS Demo	Ready
CR-1206	Power Platform Summit North America	Oct 15, 2020	AMS Demo	Ready

C. Quarterly USDA Post Conference Details

1. Once a **Quarterly Agency Post Conference Level record** has reached the status of **Pending OCFO Approval**, the records at the Quarterly Agency Level will be rolled up to the **Quarterly USDA Post Conference Details Level**.

- a. OCFO Dashboard



USDA Conference Management System

Home | Conference Requests | Annual Plan | More ▾

AgCMS Post Conference Reporting
2021 Q2 USDA CTR Approval

Agency: 2021 | Quarter: Q2 | Status: Approved

Unavailable | Under Agency Review | OCFO Review | **Approved**

Current Status: Approved

Total Conferences: 2 | **Count of Attendees:** 18 | **Total Costs:** \$1,100.00

Reporting Details | Approvals | Related Agency CTRs | Chatter

AgCMS Post Conference Reporting Name: 2021 Q2 USDA CTR Approval
 Fiscal Year: 2021
 Quarter: Q2
 Previous Quarter: [2021 Q1 USDA CTR Approval](#)
 Created By: [Melissa Derricott](#), 4/5/2021, 9:26 AM
 Owner: [Melissa Derricott](#)

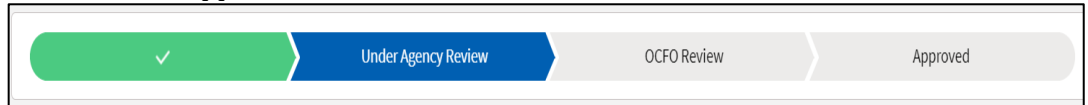
Record Type: USDA Quarterly Approval
 USDA Fiscal Year: [2021 FY USDA CTR](#)
 Last Modified By: [Melissa Derricott](#), 4/8/2021, 2:58 PM

Approved Agency Conference Reporting

Agency	Total Attendees	Total Costs	Start Date	End Date	City	State
American Dairy Products Institute (ADPI) Training	12	\$0.00	Feb 10, 2021	Oct 27, 2021	Virtual	Wisconsin
Beltwide Cotton Conferences	6	\$1100.00				

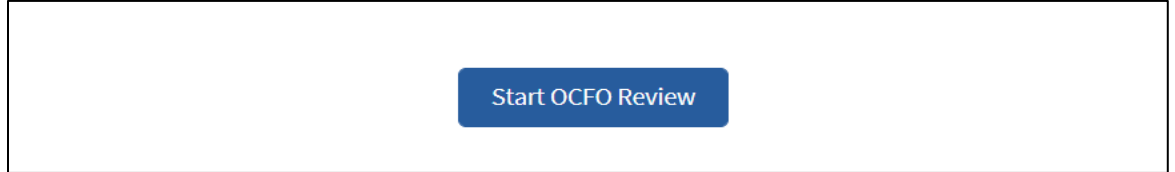
2. Clicking into a Quarterly USDA Post Conference record will display the following sections:
 - a. Approval Path
 - b. Start OCFO Review button
 - c. Quarterly Completion Information and Completed Agency Quarterly Information
 - d. Reporting Details
 - e. Approval History
 - f. Related Agency CTRs
 - g. Approved Agency Conference Reporting
3. **The Approval Path** will display what stage of the workflow process the record is currently in.
 - a. Unavailable
 - The previous quarter's record has not been approved. The OCFO is unable to begin the approval process on the Quarterly USDA Post Conference Reporting record if the previous quarter's record does not have the status of **Approved**.
 - b. Under Agency Review

- This record is ready for approval and the OCFO can select the **Start OCFO Review** button to begin the process.
 - The OCFO will need to view the lower level Quarterly Agency records to determine when to begin the approval process.
 - While the record has the status of **Under Agency Review**, Conference Expense will continue to roll up into the record.
- c. OCFO Review
- The record is currently awaiting an approval decision by the OCFO.
 - The OCFO can select the green Approve or red Denied button to make their decision.
- d. Approved
- The OCFO has approved the record.



4. Start OCFO Review Button

- a. The Start OCFO Review Button will allow the OCFO to begin the approval process for this record.
- b. The approval process will only be allowed to begin when the lower level Quarterly Agency records either have a status of **Approved** or **CTR Did Not Meet Deadline**.



5. Quarterly Completion Information and Completed Agency Quarterly Information

- a. This will display applicable information about records that have been rolled up to this current record.
- Completion Percentage
 - Complete Agencies
 - Incomplete Agencies
 - Did Not Meet Deadline
 - Total Conferences
 - Count of Attendees
 - Total Costs



6. Reporting Details

- a. The Reporting Details section will display select information about the record including:
- Post Conference Reporting Name
 - Fiscal Year
 - Fiscal Quarter
 - Type of Post Conference detail record
 - Link to the Previous Quarter's record
 - Link to the USDA Fiscal Year record

Reporting Details	Approvals	Related Agency CTRs
AgCMS Post Conference Reporting Name 2021 Q2 USDA CTR Approval		Record Type USDA Quarterly Approval
Fiscal Year 2021		Status Under Agency Review
Quarter Q2		USDA Fiscal Year 2021 FY USDA CTR
Previous Quarter 2021 Q1 USDA CTR Approval		

7. Approval History

- a. The Approval History tab will display the approval process steps that have occurred for the record.

Reporting Details	Approvals	Related Agency CTRs	
CTR Approvals (1)			
CTR Approval Type	Reviewer	Status	Reviewer Comments
OCFO Review	Test OCFO	Approved	OCFO Review is Approved

8. Related Agency CTRs

- a. The Related Agency CTRs tab will display all the lower level Quarterly Agency records that are being rolled up into this current record.
- b. The user can select this tab and quickly view the number of Quarterly Agency records and their status.

Completed Actuals	Reporting Details	Approval History	Incomplete Post Conference List	
Incompleted Post Conference Conferences				
N. ▾	Conference ▾	Start Date	Sub Agency ▾	Post Conference Status
CR-1255	Summer Fancy Food Show Conference	Mar 10, 2021	Civil Rights	Ready

9. Approved Agency Conference Reporting

- a. Once the approval has completed at the USDA level, the rolled-up Conferences will display in the **Approved Agency Conference Reporting** list.
- b. They will be grouped by their **Conference Names**. Users can select the dropdown arrow next to the Conference Name to view the attending agency information.

Approved Agency Conference Reporting					
<input checked="" type="checkbox"/>	Minneapolis AgTC Meeting	Agencies: 1	Attendees: 1	Total Costs: \$804.32	
	Agency ▾	Total Attendees ▾	Total Costs ▾	Start Date	End Date
	RD	1	\$804.32	Dec 4, 2020	Dec 4, 2020
<input type="checkbox"/>	California Coalition for Rural Housing (CCCRH)	Agencies: 1	Attendees: 2	Total Costs: \$2721.10	
<input type="checkbox"/>	Idaho Cattle Association Convention	Agencies: 1	Attendees: 1	Total Costs: \$501.00	
<input type="checkbox"/>	New York/New England Forest Health Cooperator Meeting	Agencies: 1	Attendees: 5	Total Costs: \$1183.25	

D. Fiscal Year USDA Post Conference Details

1. Once a **Quarterly USDA Post Conference Level** record has reached the status of **Approved**, the records at the Quarterly USDA Level will be rolled up to the **Fiscal Year USDA Post Conference Details Level**. Unlike the Quarterly Agency and USDA level records, there is no approval process for the Fiscal Year USDA Post Conference Details record.

USDA
Conference Management System

Home Conference Requests Annual Plan More ▾

Search...

AgCMS Post Conference Reporting
2021 Q2 USDA CTR Approval

+ Follow Quarterly CTR Report

Agency	Fiscal Year	Quarter	Status
	2021	Q2	Approved

Unavailable Under Agency Review OCFO Review **Approved**

Current Status: Approved

Total Conferences: 2 **Count of Attendees: 18** **Total Costs: \$1,100.00**

Reporting Details Approvals Related Agency CTRs Chatter

AgCMS Post Conference Reporting Name: 2021 Q2 USDA CTR Approval

Fiscal Year: 2021

Quarter: Q2

Previous Quarter: [2021 Q1 USDA CTR Approval](#)

Created By: [Melissa Derricott](#), 4/5/2021, 9:26 AM

Last Modified By: [Melissa Derricott](#), 4/8/2021, 2:58 PM

Record Type: USDA Quarterly Approval




USDA Fiscal Year: [2021 FY USDA CTR](#)

Owner: [Melissa Derricott](#)

Approved Agency Conference Reporting

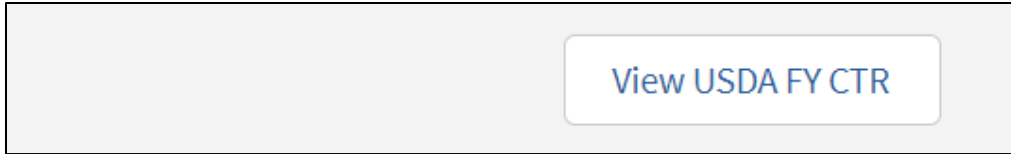
Agency	Total Attendees	Total Costs	Start Date	End Date	City	State	Total Costs
American Dairy Products Institute (ADPI) Training	12	\$0.00	Feb 10, 2021	Oct 27, 2021	Virtual	Wisconsin	\$0.00
Beltwide Cotton Conferences	6	\$1100.00					\$1100.00

2. Clicking into a Fiscal Year USDA Post Conference record will display the following sections:
 - a. Approved Post Conference Reporting and Reporting Dates Information
 - b. View USDA FY CTR button
 - c. Fiscal Year Details
 - d. Related USDA Quarters
3. Approved Post Conference Reporting and Reporting Dates Information
 - a. This section will display pieces of information in an aggregated format.
 - Total Conferences
 - Total Cost
 - Total Attendees

 Total Conferences: 100	 Count of Attendees: 1100	 Total Costs: \$50000.00
---	---	--

4. View USDA FY CTR button

- a. This button will take the user to a report of the Conference Expense records associated with the Fiscal Year USDA Post Conference record.
- b. Users will be able to export the data from this report by selecting the **dropdown button** next to the Edit button and selecting **Export**.



Report: Conference Expenses USDA FY CTR							
Total Records 69							
StringConferenceName ↑	Agency: Account Name	City	State	Country	Estimated Start Date	Estimated End Date	
2020 Administrative Law Conference (1)	AMS	Washington	District of Columbia	USA	10/19/2020	10/20/2020	
2020 Kentucky Rural Water Conference (1)	AMS	Lexington	Kentucky	USA	8/26/2020	8/30/2020	
2020 Office of Civil Rights Training (1)	AMS	Arlington	Virginia	USA	9/19/2020	9/22/2020	
2020 Ohio Housing Conference (1)	AMS	Columbus	Ohio	USA	11/7/2020	11/9/2020	
2020 Produce Marketing Association - PMA - Fresh Summit (1)	AMS	New Orleans	Louisiana	USA	10/19/2020	10/21/2020	
2020 Rural Housing Conference (Ohio) (1)	AMS	Cincinnati	Ohio	USA	9/11/2020	9/13/2020	
2020 School Nutrition Association Industry Conference (1)	AMS	Atlanta	Georgia	USA	7/9/2020	7/12/2020	
42nd Annual Joint Tomato Conference (1)	AMS	Naples	Florida	USA	9/5/2020	9/10/2020	
43rd Annual North Dakota Stockmen's Association Convention & Trade Show (1)	AMS	Minot	North Dakota	USA	9/19/2020	9/21/2020	

5. Fiscal Year Details

- a. The Fiscal Year Details section will display select information about the record including:
 - Post Conference Reporting Name
 - Fiscal Year
 - Type of Post Conference detail record
 - CTR Reporting Start Date
 - CTR Reporting End Date
 - Link to the USDA Quarter records for this Fiscal Year

Fiscal Year Details	Related USDA Quarters
AgCMS Post Conference Reporting Name 2021 FY USDA CTR	USDA Approval Quarter 4 2020 Q4 USDA CTR Approval
Fiscal Year 2021	USDA Approval Quarter 1 2021 Q1 USDA CTR Approval
Record Type USDA Fiscal Year Reporting	USDA Approval Quarter 2 2021 Q2 USDA CTR Approval
CTR Reporting Start 7/1/2020	USDA Approval Quarter 3 2021 Q3 USDA CTR Approval
CTR Reporting End 6/30/2021	

6. Related USDA Quarters

- a. The Related USDA Quarters tab will display all the USDA Quarter level records that have rolled up into this Fiscal Year USDA level record.



USDA Fiscal Quarters (4)

AgCMS Post Conference Reporting Name

[2021 Q1 USDA CTR Approval](#)

[2021 Q2 USDA CTR Approval](#)

[2021 Q3 USDA CTR Approval](#)

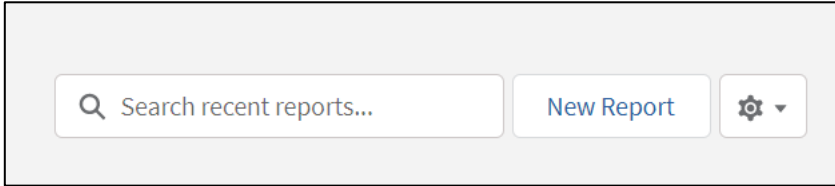
[2021 Q4 USDA CTR Approval](#)

-END-

I. APPENDIX

A. Reports

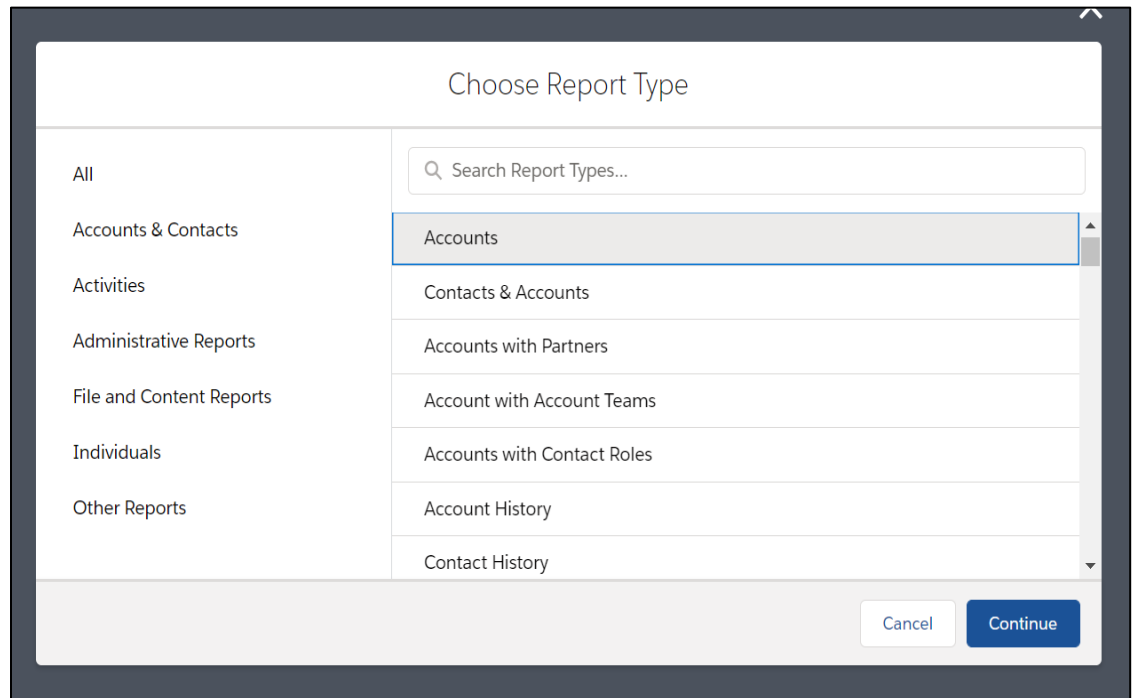
1. Select the **Report tab** and then select the **New Report** button to create a new report.



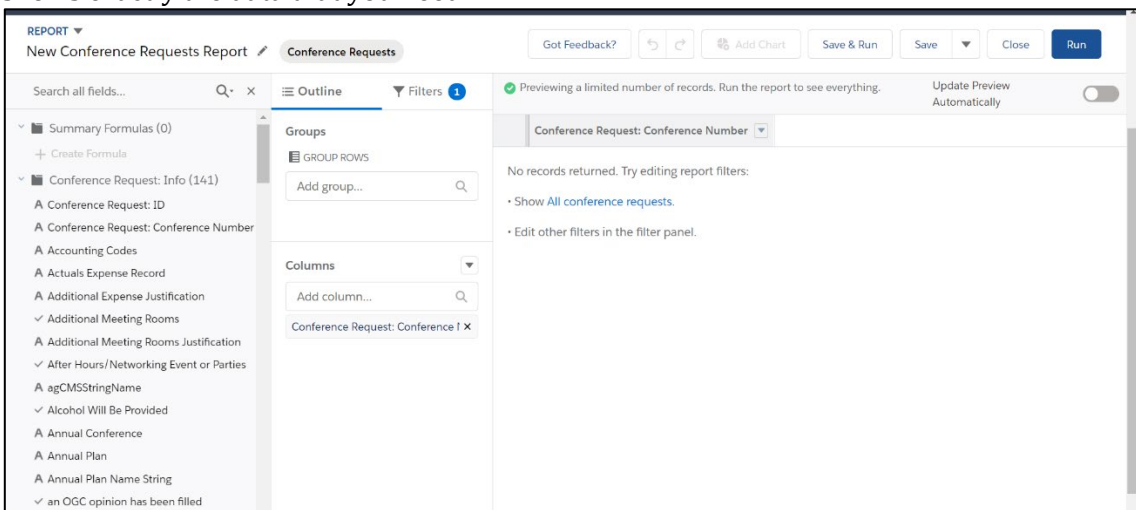
2. **Report Type:** Select the object that you would like to create a report on, then click **Continue**. The report type you choose determines which records are returned and which fields are available in your report.






- a. Examples of Reports:

- Users Report -> User Report Type
- Conference Requests Report -> Conference Request Report Type
- Annual Plan Report -> Annual Plan Report Type





3. The report opens in edit mode and shows a preview. In edit mode, add and remove fields to your report as columns, group rows and columns, and filter report data. Customize your report until it shows exactly the data that you need.





4. To add a column to your report,
 - a. Choose a field from the **Add column...** picklist.
 - b. Alternatively, expand the **Fields** pane, then drag a field onto the Columns list or directly onto the report preview.
5. To remove a column from your report,
 - a. From the Columns list, find the column you want to remove. Then click .
 - b. Alternatively, from the preview pane, find the column you want to remove. Click  | **Remove Column**.
 - c. To remove all columns from your report, from the Columns list, click .
 - d. Removing a column from your report doesn't delete the field. If you remove a column, but want it back, add it again.
6. To summarize a column in your report,
 - a. From the preview pane, find the column you want to summarize. Click  | **Summarize**.
 - b. Choose how you want to summarize the column: **Sum, Average, Max, Min**.
7. To group records in your report,
 - a. Choose a column from the **Add group...** picklist under GROUP ROWS.
 - b. After grouping a row, you can group a column by choosing a column from the **Add group...** picklist under GROUP COLUMNS. Group up to 2 rows and 2 columns.
 - c. After grouping records by a date field, you can also customize date granularity. First select the date field you want to group your report by. Then, for **Group Date By...**, apply a calendar or fiscal period.
 - d. Alternatively, drag a column from the Columns list or from the preview pane onto the GROUP ROWS or GROUP COLUMNS list.
 - e. Alternatively, from the preview pane, find the column you want to group. Click  | **Group Rows by This Column (or Group Columns by this Column)**.

After adding a group, you can show or hide detail rows, subtotals, and a grand total by clicking the switches at the bottom of the preview pane.

8. To ungroup records in your report,
 - a. From the Groups list, find the group you'd like to ungroup and then click .
 - b. Alternatively, drag the group onto the preview pane.
 - c. To ungroup all groups in your report, from the Groups list, click .


Unless you drag the group onto the preview pane, removing a group also removes the column from your report. If you still want to show the column, add it back.

9. To filter records from your report, click  **FILTERS**.
 - a. Depending on which report type you chose, your report has between two and four standard filters which are applied by default. Most templates include a Show Me filter and a Date filter. The Show Me filter scopes report results around common groups, like "my opportunities" or "all opportunities". The Date filter scopes results around a date field, like "created date" or "closed date".
 - To add a field filter, choose a field from the **Add filter...** picklist.
 - To edit a filter, including standard filters, click the filter.
 - To remove a filter, click the  icon on the filter.

For more information about filtering reports, see Filter Report Data in the Salesforce help.

10. Click **Save**. If you're creating a brand-new report, give it a name. Optionally, give it a description.

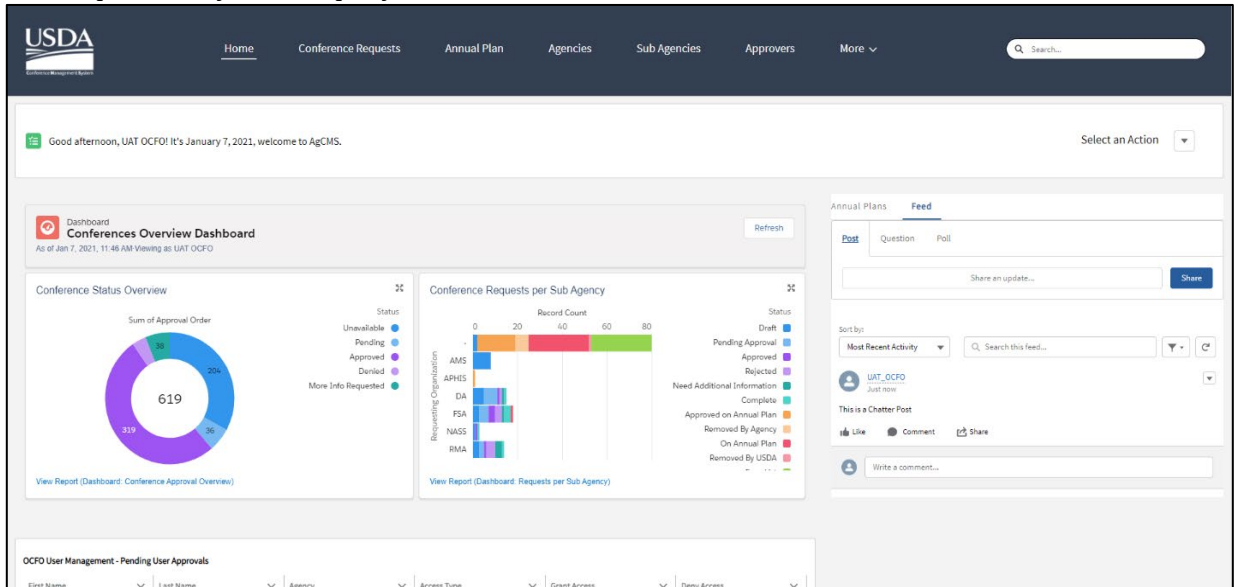
With access and sharing in mind, save the report in an appropriate folder.
11. To view complete report results, click **Run**.

In addition to creating a new report, users are able to clone reports by clicking into an existing report and clicking  | **Save As**. Save the report to the proper folder and follow the steps above to tailor the report to your needs.

To get more hands-on experience on reports, please visit Salesforce Trailhead at below location.
https://trailhead.salesforce.com/content/learn/modules/lex_implementation_reports_dashboards

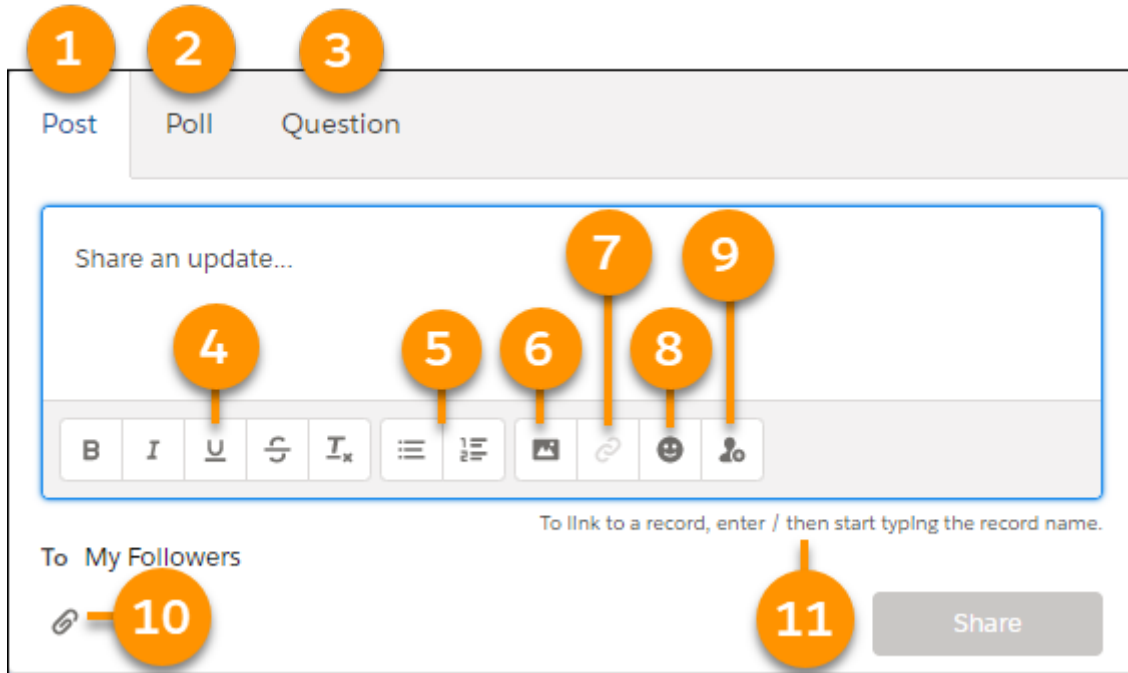
B. Chatter

1. Overview - Use Chatter features, like feeds, to share information, collaborate, and keep up with the latest updates in your company.



The screenshot displays the USDA AgCMS dashboard. At the top, there is a navigation bar with links for Home, Conference Requests, Annual Plan, Agencies, Sub Agencies, Approvers, and More. A search bar is located on the right. Below the navigation bar, a welcome message reads: "Good afternoon, UAT OCFD! It's January 7, 2021, welcome to AgCMS." A "Select an Action" dropdown menu is visible on the right. The main content area features a "Conferences Overview Dashboard" with a "Refresh" button. It includes two charts: "Conference Status Overview" (a donut chart showing a total of 619) and "Conference Requests per Sub Agency" (a horizontal bar chart). A legend for status is provided: Unavailable (blue), Pending (orange), Approved (green), Denied (red), More Info Requested (purple), and Complete (yellow). A "Chatter Feed" is visible on the right side, with tabs for Post, Question, and Poll. The feed shows a post from "UAT_OCFD" with options to Like, Comment, and Share. At the bottom, there is a table titled "OCFO User Management - Pending User Approvals" with columns for First Name, Last Name, Agency, Access Type, Grant Access, and Deny Access.

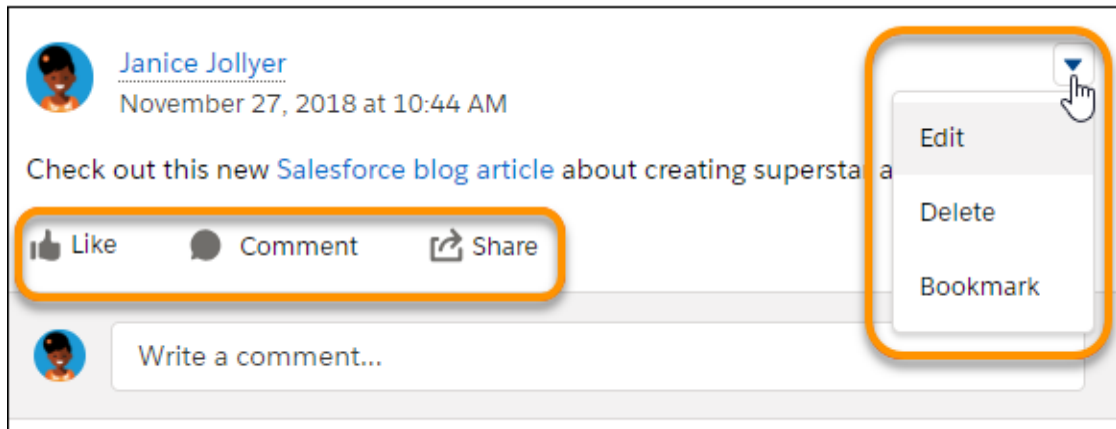
1. Post tab
2. Poll tab
3. Question tab
4. Font styles, including remove styles action
5. List styles
6. Inline image (copying inline images from external sources and pasting them into the editor isn't supported)
7. Inline Hyperlink
8. Emoji selector
9. @Mention action
10. Add file action
11. Link-to-record prompt



Note: By default, the publisher displays the Post, Poll, and Question actions. When you post to a feed, everyone with access to the feed can comment on, like, upvote (if enabled), or share the post. Other actions can appear on the action's menu.

2. Edit a Post

- a. Click Edit to modify your own posts and comments. Click Delete to remove your post from the feed. However, you can't delete other people's posts or posts about feed tracked changes.



3. View Record Feeds

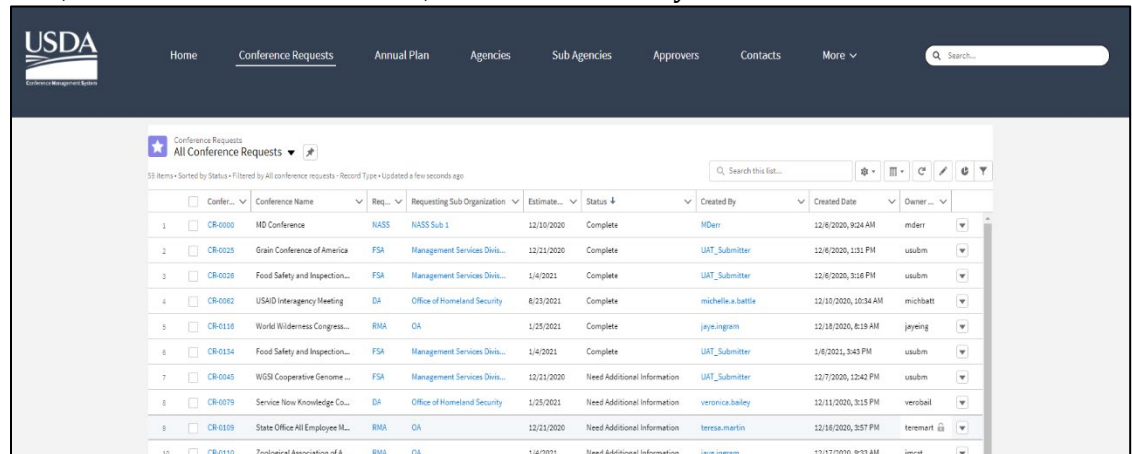
- a. View the Chatter feed associated with a record you follow to see updates about the record.

- b. Record feeds allow you to track information for records you have access to.
- c. In the record feed, you can
 - View posts, comments, and tracked field changes.
 - Write an update about the record and share it with other people who follow the record.
- d. Updates on the record detail page also appear on the Chatter page of people who follow the record. Anyone who has access to the records can see the update in the All Company (Salesforce Classic) feed. They may see the update in the Company Highlights (Lightning Experience) feed, depending on the update’s popularity ranking and engagement (such as comments, likes, and views).
- e. See who is following the record.
- f. Search the [record feed](#) (🔍).

C. List View Overview

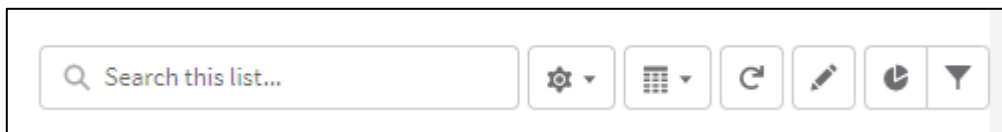
1. Overview






- In a list view, you see only the data that you have access to. You can see records that you own, have read or write access to, or are shared with you.




The screenshot shows the USDA Conference Requests list view. The header includes the USDA logo and navigation links: Home, Conference Requests, Annual Plan, Agencies, Sub Agencies, Approvers, Contacts, and More. A search bar is located in the top right. Below the header, there is a dropdown menu for 'All Conference Requests' and a search bar for the list. The main content is a table with columns: Confer..., Conference Name, Req..., Requesting Sub Organization, Estimate..., Status, Created By, Created Date, and Owner... The table contains 10 rows of data, including entries like 'MD Conference', 'Grain Conference of America', 'Food Safety and Inspection...', 'USAID Interagency Meeting', 'World Wilderness Congress...', 'Food Safety and Inspection...', 'WGS Cooperative Genome...', 'Service Now Knowledge Co...', 'State Office All Employee H...', and 'Zoological Association of A...'. Each row has a checkbox, a status indicator, and a dropdown arrow.

2. List View Buttons



- Select a list view from the dropdown menu.
 - Edit, delete, or create a list view using the List View Controls menu .
 - View a list in different ways. Visualize list view data using charts with  and refine which records are displayed using filters with .
 - Depending on the object, you can switch between the standard table view  and the Kanban view .
 - Search a list view for the data you need.
 - Select the text of the column header to sort the information displayed on the page.
- ### 3. Create or Clone a List View
- To create a new List View:

- Select the List View Controls menu  and "New".
- Fill in the List Name and decide who can access this List View.

New List View

* List Name

Who sees this list view?

Only I can see this list view

All users can see this list view ⓘ

Share list view with groups of users ⓘ

- Select the proper filter for the List View to display the desired records.

Conference Requests
 All Approved Conference Requests

1 item • Sorted by Conference Number • Filtered by My conference requests • Updated a few seconds ago


Search this list...

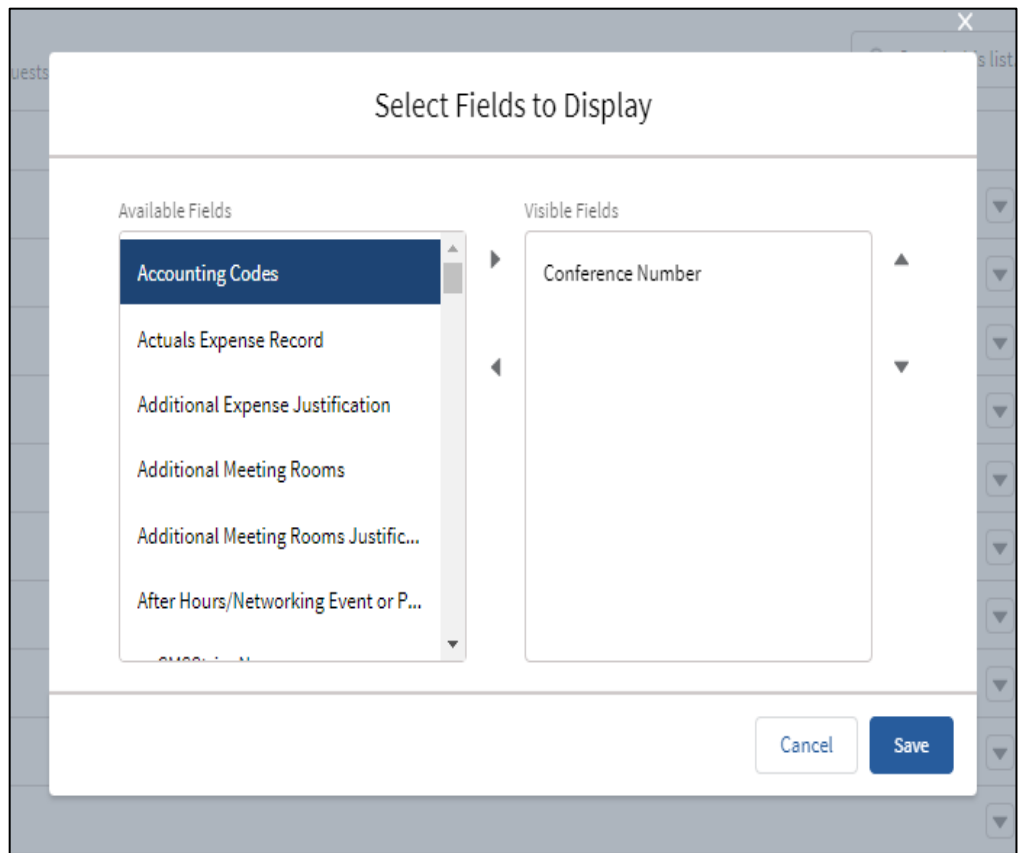
Conference Number ↑
1 CR-0131

Filters

Filter by Owner
 My conference requests


Add Filter Remove All

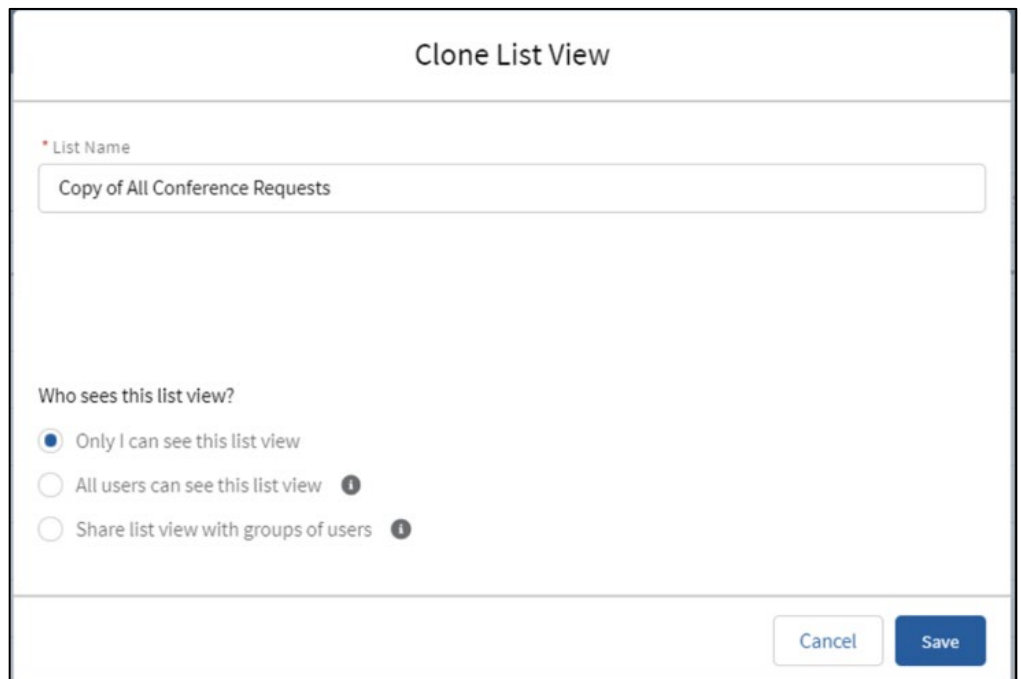
- To display specific fields from the records, select the List View Controls menu , then **Select Fields to Display**, then multi select fields from the **Available Fields** column and move them over to the **Visible Fields** column. You can reorder fields within the **Visible Fields** column by using the up and down arrows.



- Click Save to view your newly created List View.

b. To clone a List View:

- Select the List View Controls menu  and “New”.
- Fill in the List Name and decide who can access this List View.



- Follow the steps mentioned in the create a new List View section to complete the cloning of a List View.

D. General Conference Information

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with 'Home', 'Conference Requests', and 'Reports'. A search bar is located on the right. Below the navigation bar, the current conference is identified as 'Virtual Task Force/Strike Team Leader Training' with a status of 'Draft'. A progress bar shows the current stage as 'Draft'. The left sidebar contains a menu with various information categories, with 'General Conference Information' selected. The main form area is titled 'GENERAL CONFERENCE INFORMATION' and includes the following fields:

- Conference Name:** Virtual Task Force/Strike Team Leader Training
- Conference Dates:** Estimated Start Date: Jan 4, 2021; Estimated End Date: Jan 11, 2021
- Conference Location:** Country: United States of America; State: Florida; City: Miami
- Purpose:** Food Inspection conference to review annual financial report
- Justification:** Food Inspection conference to review annual financial report
- Event Type:** Radio buttons for Conference, Training, and Operational (selected). A toggle for 'This is a recurring event' is checked, with a field for 'Recurring Event Frequency (in months)'.
- Continuing Professional Education:** No
- Will your agency be hosting a booth (USDA or otherwise) at the event?** Select...
- Does this event meet the definition of a 'conference' in Appendix C to Chapter 301 of the Federal Travel Regulations and 5 USC 4101 (4)?** Yes
- What is/are the role(s) of your agency in the conference?** Checkboxes for Attendee(s), Exhibitor(s), Host(s), Presenter(s), Speaker(s), and Sponsor(s).
- Upload Conference Agendas:** A section with 'Upload Files' and 'Or drop Files' buttons.
- Conference Website:** http://www.website.com

At the bottom of the form, there are buttons for 'Save as Draft' and 'Continue to Review'.

1. Enter the conference name.
2. Enter the start and end dates (mm/dd/yyyy) or use the date picker.
3. Select the country, the state if U.S., and type in the city.
Note: If the conference is a **Virtual Conference**, please select the Country as United States and the City as Virtual.
4. Enter the purpose for attending, hosting, or sponsoring the conference.
5. Enter the justification for participating in the conference. Also include an explanation when the conference is high cost, i.e., cost per person over \$3,000 or cost per person per day over \$600.
6. Select one (or more) event type.
7. If the event is recurring move the slide button to the right and enter the frequency.
8. Select yes or no.
9. Select yes, no, or unknown.
10. Select one (or more) role(s). Selecting Sponsor(s) will open the Sponsoring Agency Information section.
11. Enter explanation.

12. If the item applies, move the slide button to the right and enter justification.
13. If applicable, this item will cause an orange flag in the Warning and Alerts. Enter justification.
14. If applicable, this item will cause a red flag in the Warnings and Alerts.
15. The folder dialog box appears. Select the file and click on Open
Note: One or more files may be uploaded.
16. The file appears above the Select box, indicating a successful upload. To delete the file, click on Edit Icon to make changes to the attachments.

E. Conference Justifications

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with the USDA logo, 'Home', 'Conference Requests', 'Annual Plans', and 'More' with a dropdown arrow. A search bar is located on the right. Below the navigation bar, the main content area shows a 'Conference Request' for 'ABC Convention Conference'. A status bar indicates the conference is in 'Draft' status. A progress bar shows the current stage as 'Draft', with other stages being 'Pending Approval', 'Approved', 'Rejected', 'Need Additional Inf...', and 'Complete'. The 'Conference Details' section is active, showing a sidebar with various information categories and a main area with four justification questions, each with a dropdown menu. The questions are: 'Will this conference help further the agency's mission or the Department's strategic plan?', 'The information cannot be effectively shared through another means such as a teleconference or the internet.', 'Is the number of employees attending justified?', and 'Is the conference or training event a 'must-do' considering the limited budget of the agency?'. At the bottom of the sidebar, there are 'Save as Draft' and 'Continue to Review' buttons. On the right side of the interface, there is a 'Sort by' dropdown set to 'Most Recent Activity', a search bar for the feed, and a list of activity items, including one from 'EPOCS7@com.agCMS.portal'.

Selecting No in any one of these questions will trigger a red flag in the Warnings and Alerts.

1. Select Yes or No.

F. Conference Sponsorship Information

Conference Details | Conference Information | Attachments | Post Conference Details | Conference Approvals

General Conference Information

Conference Justifications

Conference Sponsorship Information

Requestor Information

Overall Attendee Information

Facility Information and Justifications

Overall Cost Information

Accounting Information

Miscellaneous Attachments

CONFERENCE SPONSORSHIP INFORMATION

Sponsoring Organization Co-Sponsor Organization

Executive Sponsor

Name Title

Email Phone

Point of Contact

Name Title

Email Phone

Second Point of Contact

Name Title

Email Phone

← →

EPOC57@com.agCMS.portal updated this record. 2m ago

Conference Name
A blank value to ABC Convention Conference

Like Comment

Write a comment...

1. Select the sponsoring organization – either a USDA agency, Other (non-USDA), or N/A if not applicable or unknown.
2. Select the co-sponsoring agency or N/A if unknown or not applicable.
3. Type in the non-USDA co-sponsoring organization if known; otherwise, enter N/A or unknown.
4. Enter the executive sponsor's name and title.
5. Enter the sponsoring organization's POC's name and title.

G. Requestor Information

Conference Request
ABC Convention Conference

+ Follow Copy Conference Change Owner Connect an Annual Conference

Conference Number	Annual Conference	Requesting Organization	Requesting Sub Organization	Status	Post Conference Status
CR-0798		RD	Alabama	Draft	Not Available

Draft Pending Approval Approved Rejected Need Additional Inf... Complete

Conference Details Conference Information Attachments Post Conference Details Conference Approvals

General Conference Information

Conference Justifications

Conference Sponsorship Information

Requestor Information

Overall Attendee Information

Facility Information and Justifications

Overall Cost Information

Accounting Information

Miscellaneous Attachments

REQUESTOR INFORMATION

Requesting Organization: RD Requesting Sub Organization: Alabama

Requesting organization and sub organization are used to route your conference for approval. They should be your organization within an Agency or staff Office.

Requestor Name: End2End POC Requestor Title:

Requestor Email: yelovic@deloitte.com Requestor Phone: 1234567890

← Save as Draft Continue to Review →

Sort by: Most Recent Activity Search this feed...

EPOC57@com.ag.CMS.portal updated this record. 2m ago

Conference Name: A blank value to ABC Convention Conference

Like Comment

Write a comment...

1. Select the agency, which is limited to those the user has access to.
2. Select the sub agency. This field determines the approval workflow, i.e., the conference will route through the approvers listed for the sub agency.
3. Enter the requestor's information.

H. Overall Attendee Information

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with 'Home', 'Conference Requests', 'Annual Plans', and 'More'. A search bar is located on the right. Below the navigation bar, the current conference request is identified as 'ABC Convention Conference' with a status of 'Draft'. A progress bar shows the stages: Draft (selected), Pending Approval, Approved, Rejected, Need Additional Inf..., and Complete. The main content area is titled 'OVERALL ATTENDEE INFORMATION' and contains several input fields for tracking attendees:

- Total number of agency employees attending the event: 0
- Total number of non-agency employees attending the event whose costs are paid by USDA: 0
- Total number of non-agency federal participants attending the event: 0
- Total number of non-federal participants attending the event: 0
- Total Attendees: 0

Below these fields is a section for 'Upload Attendee Detailed Cost Analysis' with a note: 'Please attach the conference agenda, or if training, the official list of courses.' It includes 'Upload Files' and 'Or drop files' options. A sidebar on the left lists various information categories, with 'Overall Attendee Information' currently selected. On the right, there is a social feed showing a recent update from 'EPOCst7@com.agCMS.portal' and a comment input field.

1. Enter the number of USDA employees (both in and outside the agency) attending the event that are paid for by the agency.
2. Enter the number of non-USDA attendees whose expenses (partial or full) are paid for by the agency.
3. Enter the number of non-USDA federal participants not covered by #1 or #2, if known.
4. Enter the number of non-federal participants not covered by #1 or #2, if known.

I. Facility Information and Justifications

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with 'Home', 'Conference Requests', 'Annual Plans', and 'More'. A search bar is located on the right. Below the navigation bar, the main content area shows a conference request for 'ABC Convention Conference' with a status of 'Draft'. A progress bar indicates the current stage is 'Draft'. The left sidebar contains a list of sections, with 'Overall Attendee Information' selected. The main content area is titled 'FACILITY INFORMATION AND JUSTIFICATION' and contains three dropdown menus: 'In what type of facility will the event be held?' (with 'Select...' as the current selection), 'Justification of why a tele/video conference is not a viable alternative to meeting in person.' (with a text input field), and 'What was the basis for selecting this location?' (with 'Location selected by host' as the current selection). At the bottom of the main content area, there are 'Save as Draft' and 'Continue to Review' buttons. On the right side, there is a social media-style activity feed showing a recent update from 'EPOCS7@com.agCMS.portal' and a comment input field.

1. Select the facility type. “Commercial Facility” prompts for a justification.
Note: *If the conference is a **Virtual Conference**, please select **Virtual** under the **Facility Type** field.*
2. Enter justification for in person attendance.
3. Select location basis. If the agency is hosting the conference (i.e., selected “Hosts(s)”, the first and third options will be available; otherwise, the choice will be limited to the second option.

J. Overall Cost Information

If "Host(s)" is selected in section [General Conference Information](#) and "Cost comparison performed to select location" in section [Facility Information and Justifications](#) this section will expand to show three columns, one for each location; otherwise, the default consists of only the first column (Preferred Location).

Conference Details | Conference Information | Attachments | Post Conference Details | Conference Approvals

General Conference Information

Conference Justifications

Conference Sponsorship Information

Requestor Information

Overall Attendee Information

Facility Information and Justifications

Overall Cost Information

Accounting Information

Miscellaneous Attachments

OVERALL COST INFORMATION

PREFERRED LOCATION

CITY AND STATE OF EVENT

PER DIEM RATES - LODGING

PER DIEM RATES - M & IE

LOCATION OF EVENT

TYPE OF FACILITY

1 - AIR FARE

2 - LOCAL/TDY TRANSPORTATION EXPENSES

3 - MISCELLANEOUS

4 - TOTAL LODGING

5 - TOTAL M & IE

TOTAL TRAVEL EXPENSES

6 - FACILITY / ROOM RENTAL

7 - FOOD AND BEVERAGE

8 - PROMOTIONAL MATERIAL

9 - SPEAKER / TRAINER FEES

10 - OTHER COSTS - ITEMIZED

EPOC57@com.agCMS.portal updated this record, 4m ago

Conference Name
A blank value to ABC Convention Conference

Like Comment

Write a comment...

8 - PROMOTIONAL MATERIAL \$0.00

9 - SPEAKER / TRAINER FEES \$0.00

10 - OTHER COSTS - ITEMIZED \$0.00

11 - REGISTRATION FEES \$0.00

12 - EXTERNAL FUNDS \$0.00

13 - AV COSTS \$0.00

TOTAL NON-TRAVEL EXPENSE \$0.00

TOTAL EVENT COST WITHOUT SALARY \$0.00

TOTAL SALARY AND BENEFITS \$0.00

NON-FEDERAL CONTRIBUTION \$0.00

← Save as Draft Continue to Review →

1. Prepopulated from section [General Conference Information](#).
2. Enter the lodging and M&IE per diem rates. Refer to the General Services Administration's Per Diem Rates at <https://www.gsa.gov/travel/plan-book/per-diem-rates>.
3. Enter the specific type of facility, e.g., hotel, conference center, etc., as opposed to a "general" type of facility in section [Facility Information and Justifications](#).
4. Prepopulated from section [Facility Information and Justifications](#)
5. Enter the applicable dollar amounts.
6. Enter the applicable dollar amounts. A non-zero entry prompts for the justification, description and/or explanation. Light refreshments will trigger an orange flag in Warnings and Alerts.
 - a. Enter justification.
 - b. Enter description.
 - c. Enter explanation.
7. The Deputy Secretary Memo only appears when the total cost (without salaries) is over \$75,000.
 - a. Clicking on the Deputy Secretary Memo link opens a new webpage of the OCFO Travel Express site where templates, including the memo, can be downloaded.
 - b. Complete the memo and upload (see upload instructions in section [General Conference Information](#)).
8. This only appears for a hosted conference utilizing a cost comparison to select location.
 - a. Select the location methodology. Enter the justification.
 - b. Enter explanation.
9. The Attendee List template can be downloaded from the OCFO website. See upload instructions in section [General Conference Information](#).
10. The Speaker Credentials only appears when the Speaker/Trainer Fees in section [Overall Cost Information](#) non-zero. See upload instructions in section [General Conference Information](#).

K. Accounting Information

The screenshot displays the USDA Conference Management System interface. At the top, there is a navigation bar with links for Home, Conference Requests, Annual Plans, and More. A search bar is located on the right. Below the navigation bar, the current conference request is identified as "ABC Convention Conference" with a status of "Draft". A progress bar shows the stages: Draft (selected), Pending Approval, Approved, Rejected, Need Additional Inf..., and Complete. The "Conference Details" tab is active, showing a sidebar with various information sections. The "Accounting Information" section is selected, displaying fields for "Funding Type" (with options: Appropriated, Multi-Year, Reimbursable Funds, No Year Funds, Working Capital), "Accounting Codes" (a text input field), and "Contracting" (a dropdown menu). At the bottom of the form, there are "Save as Draft" and "Continue to Review" buttons. On the right side, there is a social media-style activity feed showing a recent update from "EPOC57@com.agCMS.portal" and a comment input field.

1. Select the funding type.
2. Enter the accounting code(s).
3. Select the contracting methodology.
4. This only appears when the Non-Federal Contribution in section [Overall Cost Information](#) is non-zero.
 - a. Enter the non-federal funding organization(s).
 - b. If applicable, move the slide button to the right, which prompts for an Office of General Counsel form upload.

L. Miscellaneous Attachments

Upload other pertinent documents as needed.

Conference Request
ABC Convention Conference

+ Follow Copy Conference Change Owner Connect an Annual Conference

Conference Number CR-0798	Annual Conference	Requesting Organization RD	Requesting Sub Organization Alabama	Status Draft	Post Conference Status Not Available
------------------------------	-------------------	-------------------------------	--	-----------------	---

Draft Pending Approval Approved Rejected Need Additional Inf... Complete

Conference Details Conference Information Attachments Post Conference Details Conference Approvals

- General Conference Information
- Conference Justifications
- Conference Sponsorship Information
- Requestor Information
- Overall Attendee Information
- Facility Information and Justifications
- Overall Cost Information
- Accounting Information
- Miscellaneous Attachments

MISCELLANEOUS ATTACHMENTS

Upload Miscellaneous Documents

Use this section to upload miscellaneous documents.

Or drop files

←

Sort by: Most Recent Activity Search this feed... [Filter] [Refresh]

EPOC57@com.agCMS_portal updated this record. 5m ago

Conference Name
A blank value to ABC Convention Conference

Like Comment

Write a comment...

M. Save or Submit

The **Save as Draft** and **Continue to Review** buttons are at the bottom of the page. Save progress or proceed to submit. Left and Right arrows will allow user to navigate between sections of the conference request.



To go to any specific section of the conference form, user can click on the on the side Tab to navigate between tabs to access required details, and the check box is checked on the side tab that indicates that all mandatory information on that section has been filled by user it marks complete in order to go next section.

The **Edit Conference Information**, **Submit to Review** and **Save as Draft** buttons are at the bottom of the Review page.

A screenshot of the USDA Conference Management System interface. The top navigation bar includes "Home", "Conference Requests", and "Reports", along with a search bar. The main content area shows details for a conference request titled "A Community On Ecosystem Services Conference". It includes a progress bar with stages: Draft (selected), Pending Approval, Approved, Rejected, Need Additional Information, and Complete. Below this are tabs for "Conference Request", "Conference Information", "Conference Approvals", "Chatter", "Post Conference Details", and "Attachments". The "Warnings and Alerts" section contains several messages, including one about after-hours events and another about serving alcohol. The "Cost Calculations" section displays a table with the following data:

TOTAL DIRECT COSTS (W/O SALARIES)	\$50,000,126.00
TOTAL SALARY AND BENEFIT COST	\$0.00
USDA ATTENDEES	0
TOTAL DAYS	4
COST PER ATTENDEE	5x
COST PER ATTENDEE PER DAY	\$NaN

At the bottom of the page are three blue buttons: "Edit Conference Information", "Submit to Review", and "Save as Draft".

II. Frequently Asked Questions (FAQS)

A. General

Why can I not access AgCMS from Internet Explorer?

AgCMS is built on the Salesforce Lightning Platform. Internet Explorer is not a supported browser of Salesforce. Please use either Google Chrome or Mozilla Firefox to access the system.

What is the URL for AgCMS?

<https://cloudapps2.my.salesforce.com/>

Where can I find training materials?

Training videos and the user guide will be available on AgLearn and the Salesforce AgCMS application under the Files navigation menu -> User Guide Library.

Who can see my chatter post?

Chatter posts that are made on a specific record are available to any user who has access to that record. Posts that are made on the home page are available to all users. Notifications will only go to the users specified as @mention.

Will existing CTAT users have to register in AgCMS?

If you are on the initial list for approved Salesforce license users, you will be automatically given access to AgCMS. Otherwise, you will need to go through the registration process. Please contact your Agency POC for more details.

Will information stored in CTAT be available in AgCMS?

Yes, we are moving all data from CTAT to AgCMS. Conferences that were not completed in CTAT (*draft, pending, or additional information*) will be in "Archived" status in AgCMS. These requests may be "reactivated" by copying the conferences and creating them as new conferences for submission. All other conferences (*approved and disapproved*) will retain their status in AgCMS.

If a user is @mentioned in Chatter how will they receive notification?

All users will receive an email when they are @mentioned in a chatter post.

Can the dashboard only show data for my agency?

At this time, it cannot, however, users can create personalized reports related to their agencies data in the reports section or from the report links on the dashboard.

What is the policy around conference requests that are virtual conferences?

There is currently no separate policy for virtual conferences; they will be treated the same based on estimated expenses. For AgCMS, a future enhancement will be to standardize the location to "virtual" by either adding such as an option in the city and state/country dropdown or adding a checkbox to indicate if the event is such.

Can I type in the name of a conference?

Conference Name is no longer a free text field. You will be prompted to select from a pre-approved list of names. POCs can request to add a new name by navigating to the Conference Names list.

Can any user create list views?

Yes, all users can create a list view by navigating to the list of records such as Conference Requests.

Can any user create a report?

Yes, all users can create reports. Users have the ability to save reports to a private folder, subscribe to receive an email, or export reports.

How can I see a list of just my agencies?

On the Select an Action menu, under the section of Navigate to Agency, there is a list of the agencies you have access to. **Note:** You will only be able to perform or see certain elements on the agency profile based on your access.

I hold two or more roles within the AgCMS system (Approver, Submitter, etc.), will I be able to conduct tasks for different roles if the home page is different for each role?

Yes, although your home page will be tailored based on your roles, you will be able to accomplish tasks corresponding to your role from the home page and the system at large.

B. User: Agency POC

What is the timeline for getting my Conference Name approved?

OCFO will ensure new conference name approval requests are reviewed and processed in a timely manner.

Can I automatically include SATO/Agency Head for conference requests for conferences under 40k?

Yes, check the "Include SATO/Agency Head Under 40k" check box on the sub-agency record page.

Who should be added to the routing list for a sub-agency?

Only internal sub-agency users. The SATO, Agency head, and Under Secretary approvers are all set at the agency routing level and do not need to be included at the sub-agency.

Can I change the owner of a conference request, if someone is on leave or unavailable?

Yes, POCs can transfer and revert conference ownership as needed.

How do I know how many licenses are available for my agency?

TBD

What can I do if I do not have a license available and I need to update a routing list because a user is leaving the organization?

You may add yourself as the approver (*i.e., placeholder*) so the user can be removed from the routing list.

Can I delete an approver from a routing list?

Yes, but only if there is another approver at that level or if the user being deleted is immediately replaced. An approver level cannot be blank.

C. User: Submitter

Can I change the data that is pre-populated from a copied conference request?

Yes, all copied information is editable in the newly created draft conference request.

Can I submit a conference that was left off the annual plan?

Yes, conferences that were left off the annual plan can still be submitted for approval. Navigate to the Select an Action menu on the home page and select the Start a Conference Request item.

Which Conference Requests can be copied?

Any conference can be copied; however, annual plan conferences can only be copied if they have been approved (i.e., “Approved on Annual Plan” status).

Who can edit a conference request?

Only the submitter/conference owner can edit a conference request. However, POCs may transfer ownership to allow a different user to edit a request.

Can I find out if a conference request has already been submitted for my agency?

Yes, there are two ways: **1.** You can run a report on the agency to see which conferences have been submitted and/or **2.** You can create a list view for your agency conferences and use the search function.

Are you able to upload attachments after a conference request has been submitted?

Yes, you can upload attachments after a conference request has been submitted.

Can I submit conferences to the Annual Plan?

Annual plans are prepared and submitted by the Agency POC. Contact your Agency POC for instructions.

Where can I see my approved Annual Plans so I can start conference requests to begin the full approval process?

You can access the Annual Plans for your agency from the home page and see a list of all the related annual plan conferences. You can also access the approved annual plan conferences under the annual plan from Conference Request list view.

How do I find approved annual plan conferences?

See answer in preceding question

Should I create a conference request for conferences under 20k?

It is recommended that all conferences be entered in AgCMS which will serve as the Department’s conference repository.

Is there a set deadline for when Post Conference details need to be submitted?

There is no set deadline for each conference, but agencies must report actual costs for all conferences within 30 days after each fiscal quarter.

D. User: Approver

Can a user in the secondary approver role approve a conference for me?

Yes, secondary approvers can approve, reject or request additional information on a conference. Once a decision has been entered at an approver level – whether by the primary or secondary – the conference moves to the next level.

Can I download the Salesforce app to my USDA phone?

Yes, the app can be downloaded to your USDA phone. However, mobile app functionality is currently limited to conference review and approval.