



USAID
FROM THE AMERICAN PEOPLE

eConference Tracking and Approval System (eCTAS) User Guide

Additional Help for ADS Chapter 580

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1. INTRODUCTION

The eConference Tracking and Approval System (eCTAS) is a web-based application to manage conference planning and attendance. A conference is defined as a seminar, meeting, retreat, symposium, workshop, training activity or other such event that is funded in whole or in part by USAID. This includes events funded with USAID operating expense and program funds, including those hosted by implementing partners, and events sponsored by external organizations that USAID employees attend.

The Chief Operating Officer (COO) must approve any USAID-funded conference that 20 or more USAID employees are expected to attend and the attendance of 3 or more employees Agency-wide at the same external conference. “Conference” does not include certain training events or routine meetings with partners, interagency meetings and meetings among staff held at U.S. Government owned or leased facilities where no cost is incurred. See ADS 580, Conference Planning and Attendance, for more detailed information on conferences. Users must also read and agree to the policy guidance provided in the system.

2. GETTING STARTED

Log into the system [here](#) or from the USAID internal web site under “web applications.” You will have the option to perform the following functions:

- Request approval to attend a conference sponsored by an external entity (non-USAID-funded)
- Request to attend a USAID conference
- Create a USAID conference and request approval
- Review your requests
- View all conferences

The instructions for completing each function are provided in this user guide. **For additional help or questions regarding eCTAS, please contact the CIO Help Desk at (202) 712-1234 or e-mail CIO-HELPDESK@USAID.gov.**

3. ATTEND CONFERENCE OR EVENT SPONSORED BY EXTERNAL ENTITY

1. Select the option on the welcome screen to attend a conference sponsored by an external entity.

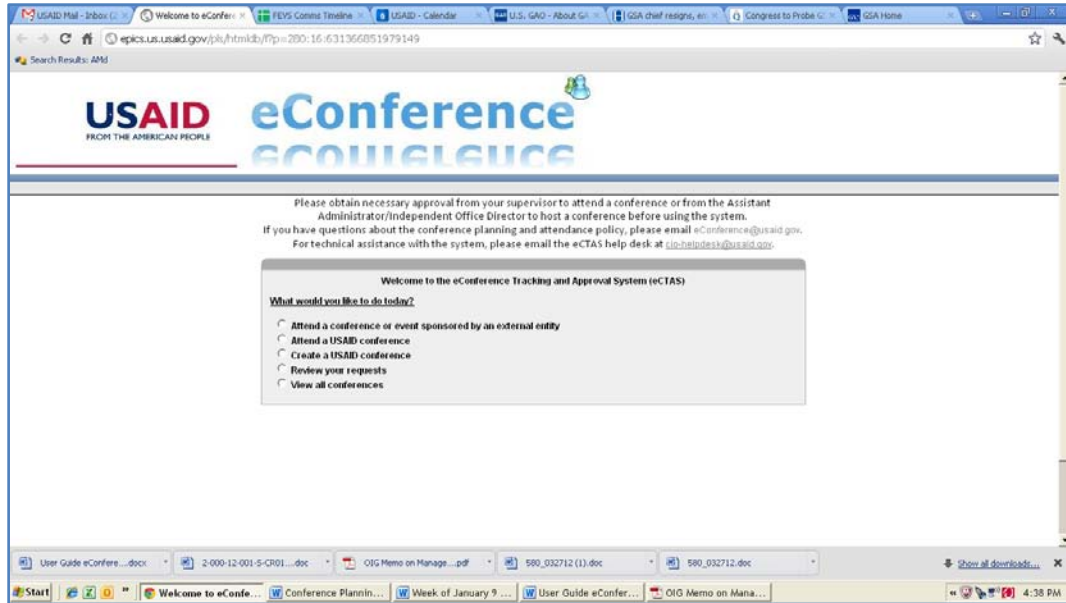


Figure 1: Welcome Screen

2. Log in using your network user name and password.
3. Read the policy guidance on conference planning and attendance and click on “I Agree”.
4. Select your conference from the list of conferences (See 1 in Figure 2). You may also use the search (See 2) capability to locate the conference. Skip to number 9 if the conference is not listed.

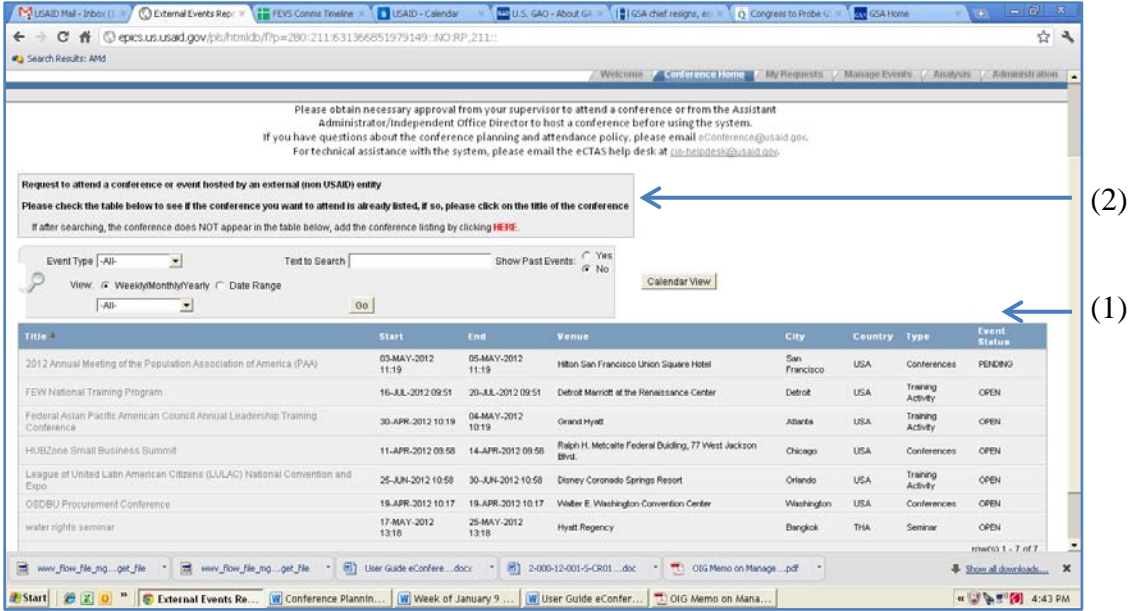


Figure 2: External Events Screen

- 5. Review the details of the event to ensure that you have made the right selection.
- 6. Click on the “Request Attendance” button.

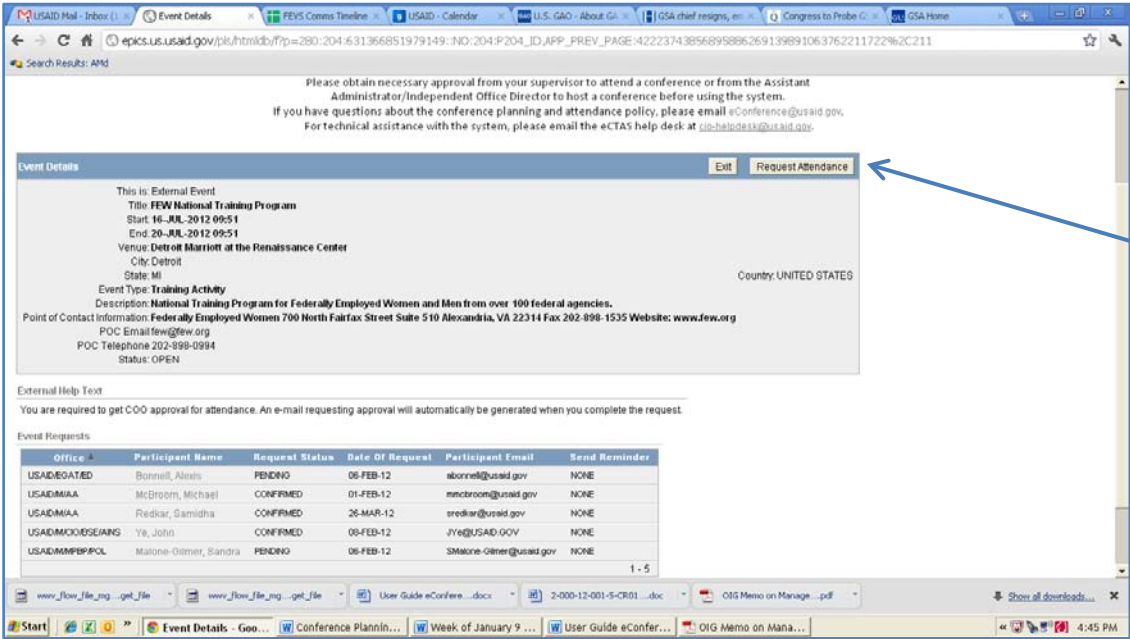


Figure 3: Events Details Screen

- 7. Fill in the form with the requested information and hit the “Request Attendance” button again. You may click on a field for additional information on how to complete the box.

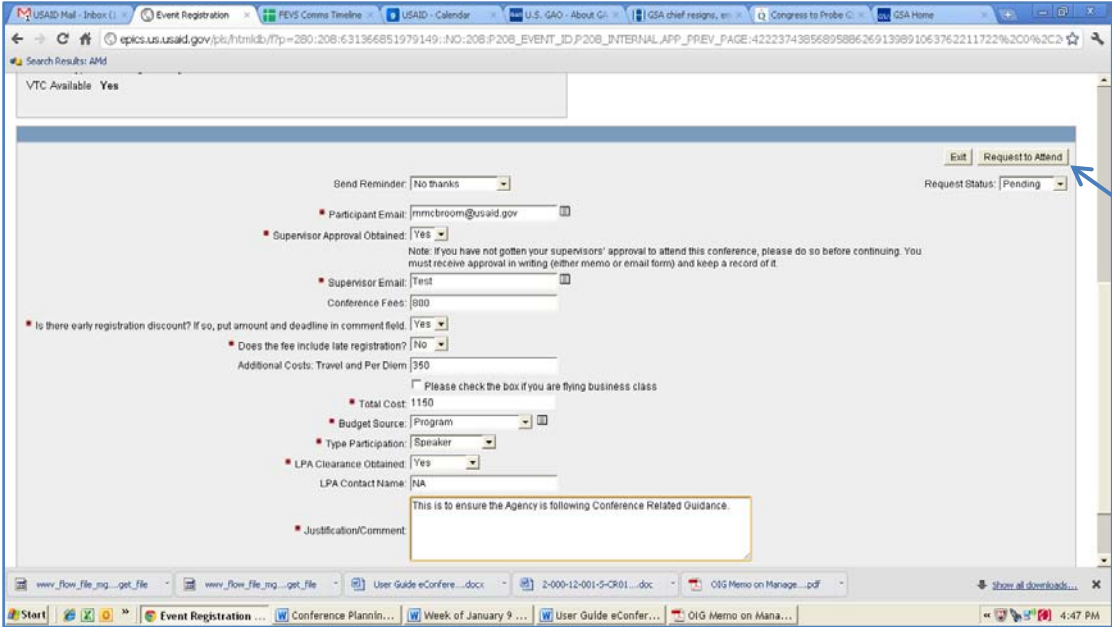


Figure 4: Attendee Details Screen

- 8. You are done! You will receive an e-mail acknowledging your request immediately. A follow-up e-mail will be provided within two days regarding the disposition of your request.
- 9. If you **do not see your conference on the list**, you must add the event. Click on the red **“Here”** to enter the event.

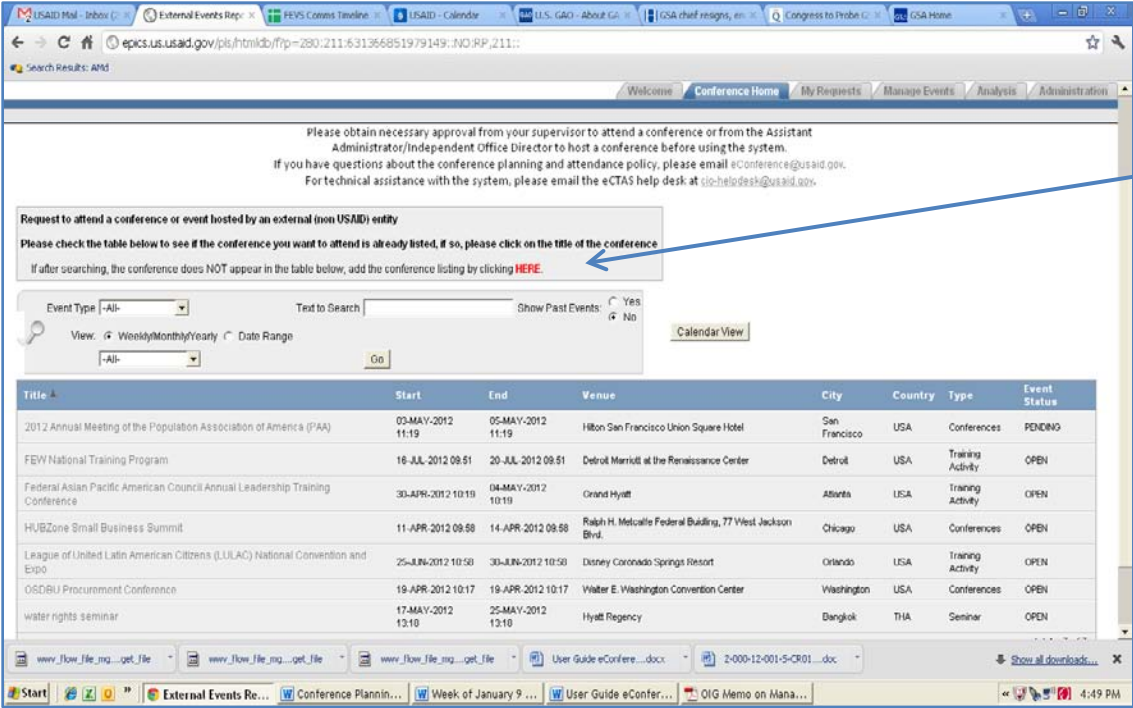


Figure 5: External Events Request Screen

10. Enter the requested information in the fields and click next. You may click on a field for additional information on how to complete a box.

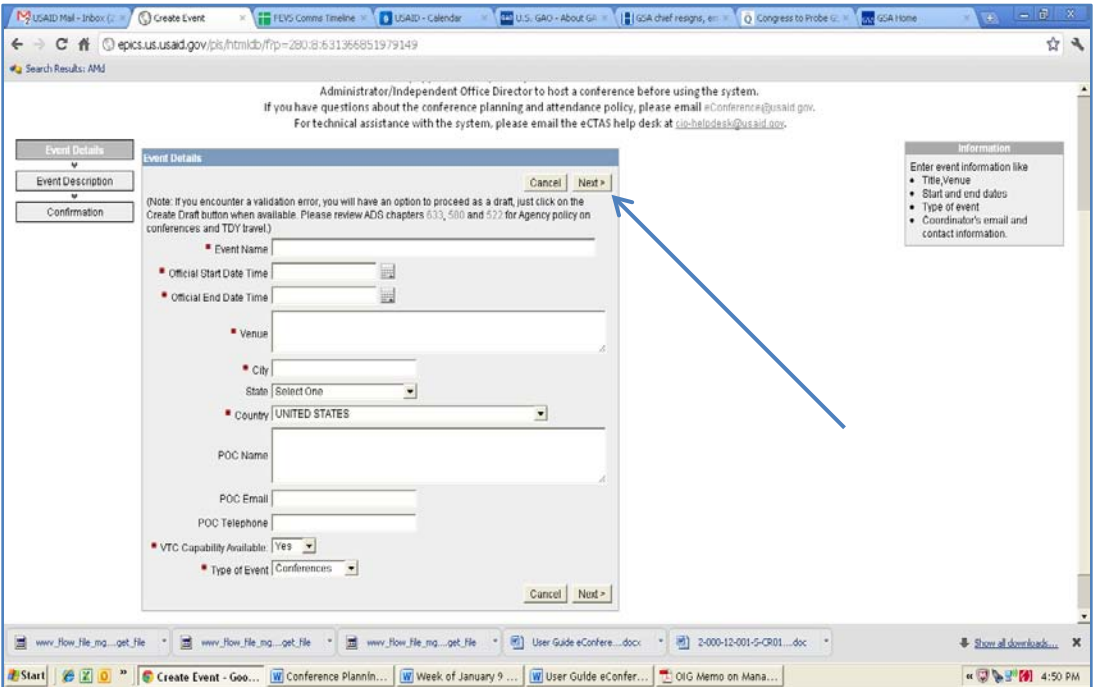


Figure 6: Create Events Screen

11. Select the theme that best describes the event from the drop-down box (See 1 in Figure 7), enter a brief description (See 2) and select the reason that best describes why a USAID employee should attend this event (See 3). You may click on the list for additional information on each item listed. For example, you can view the USAID Forward Agenda by clicking on “Supports USAID Forward Agenda”. After completing this information, click on “Create” (See 4).

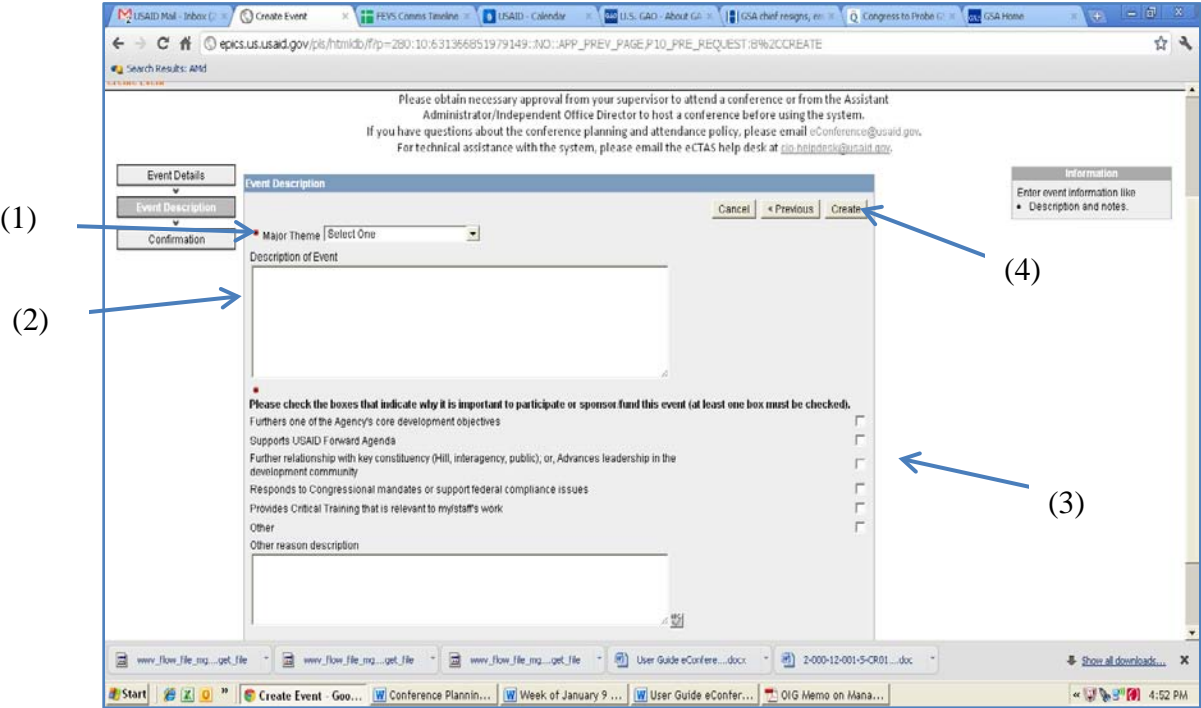


Figure 7: Creating an Event

12. Review the information again to ensure that it is not a duplicate and that the information you entered is correct. When you are ready, click “Create” again.

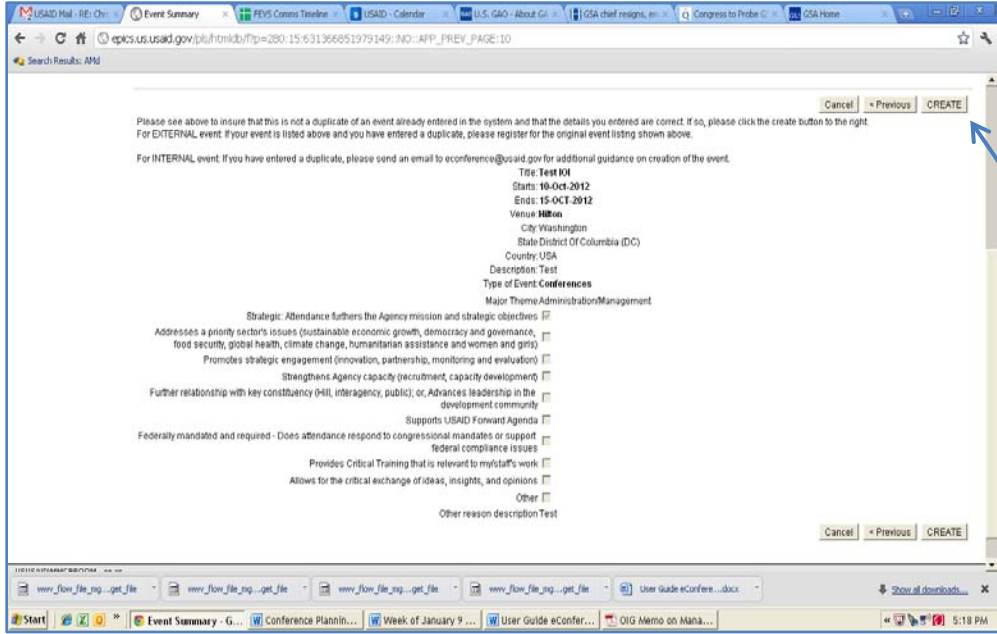


Figure 8: Event Summary Screen

13. Now that the event has been created, **you must submit a request to attend**. Locate the event on the calendar and click on it. Alternatively, you can put the name in the search bar.

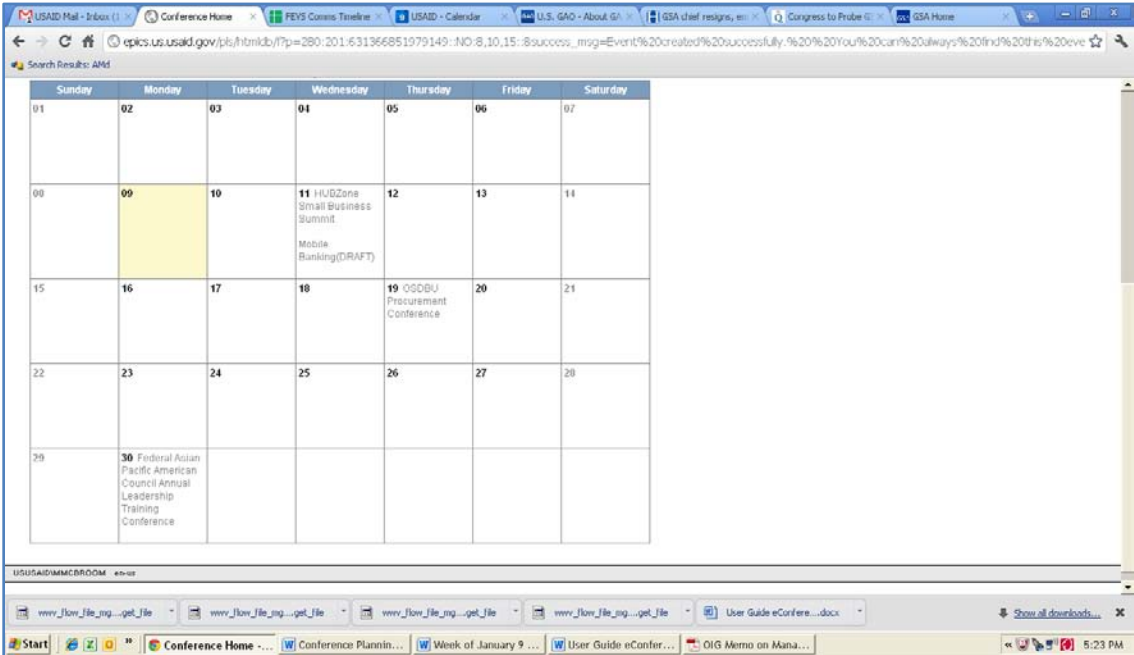


Figure 9: Conference "Home" Screen

14. Click on “Request Attendance”

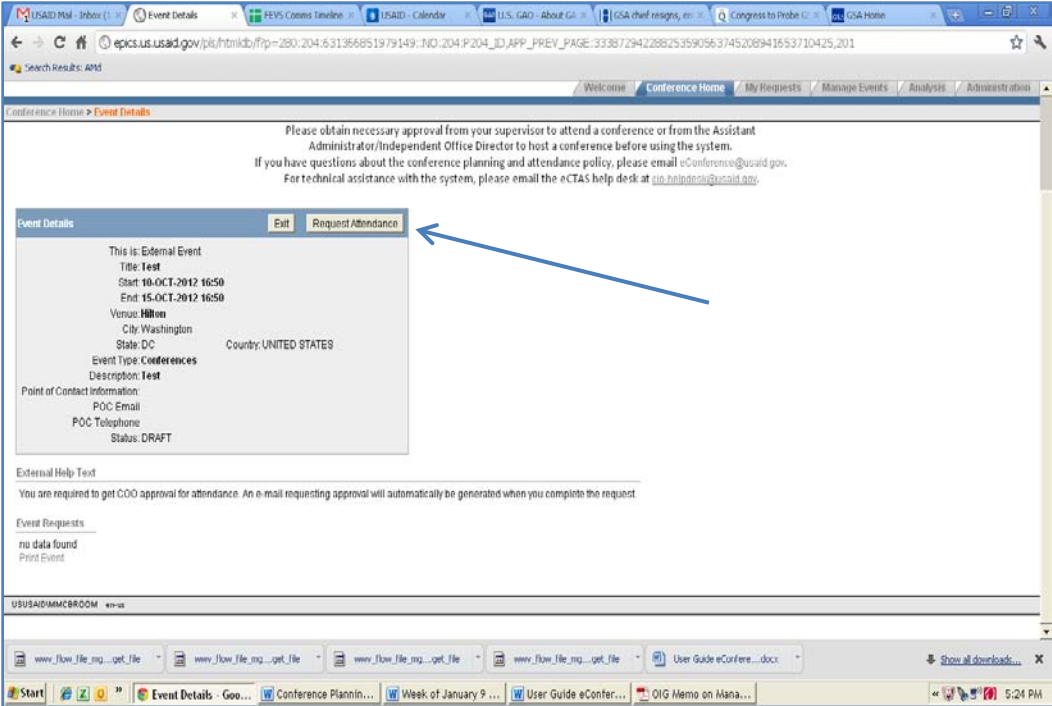


Figure 10: Requesting Conference Attendance

15. Enter the requested information and hit the “Request Attendance” button again. You may click on a title for additional information on how to complete the box.

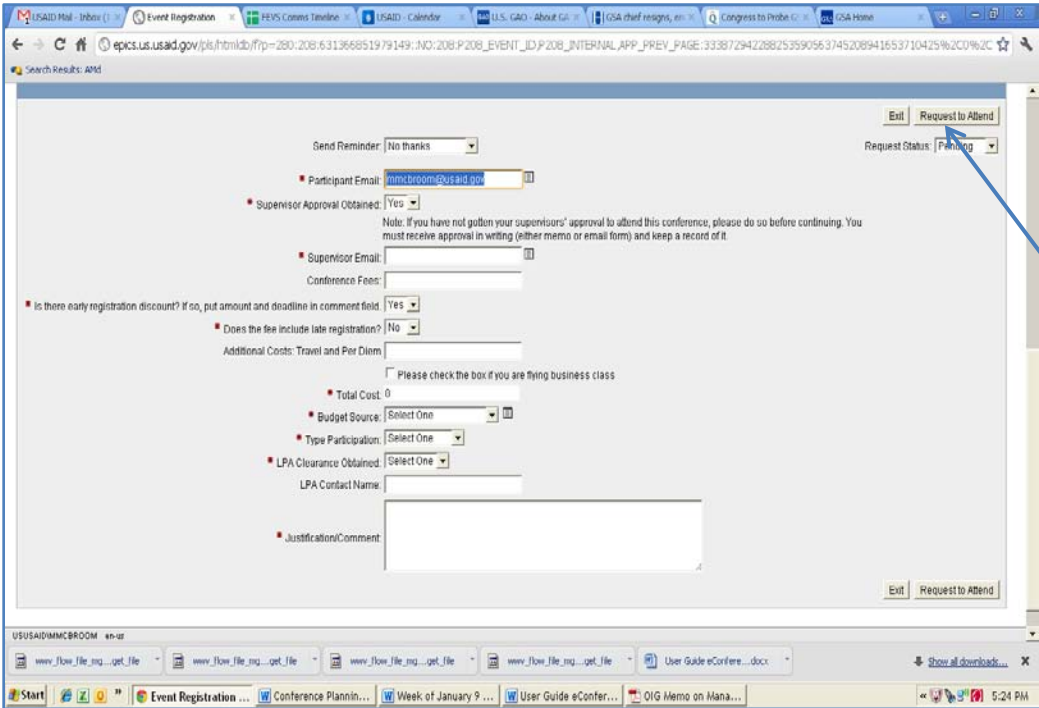


Figure 11: Attendee Details Screen

16. You are done! You will receive an e-mail acknowledging your request immediately. . You will receive the Chief Operating Officer’s response to your request within two days.

4. CREATE USAID CONFERENCE

1. Click the “Create a USAID Conference” button on the welcome screen.

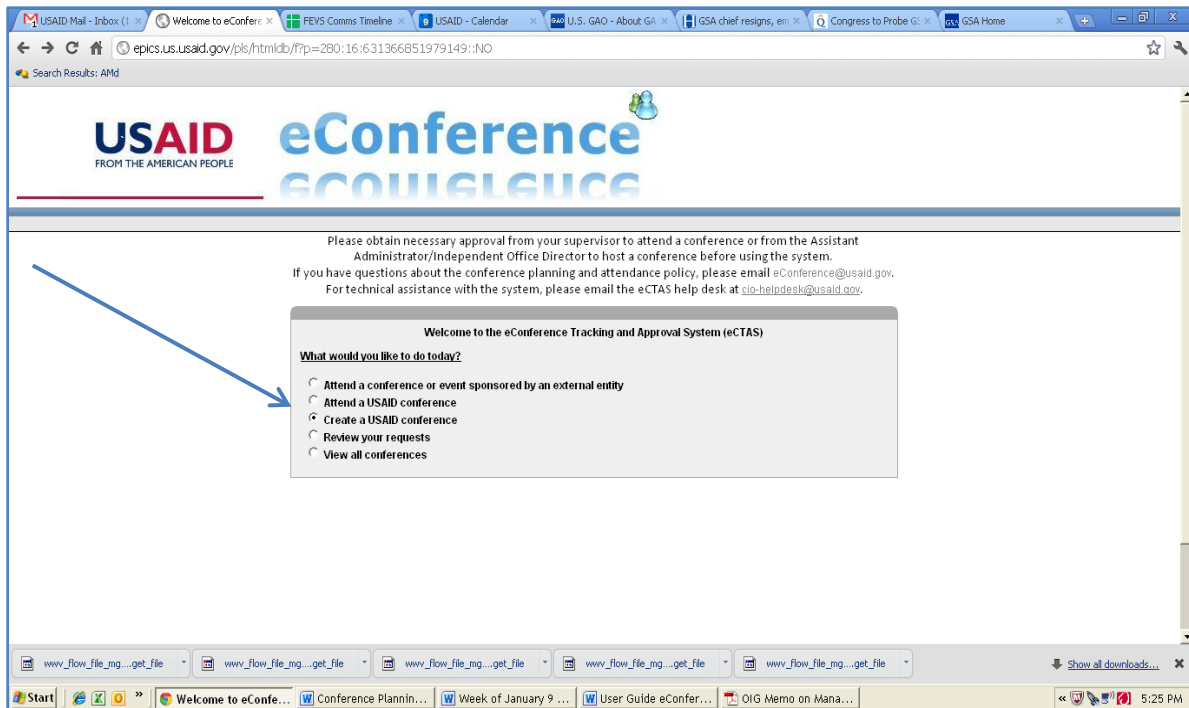


Figure 12: Creating USAID Conference

2. Log in using your network user name and password
3. Read the policy guidance on conference planning and attendance and click on “I Agree”.
4. You will need three quotes for the venue (one U.S. Government where available) in order to complete the process. You may click on [Fedrooms](#) to request a market survey of commercial facilities and [GSA Facilities](#) to request a quote from GSA meeting and conferences spaces.
5. When you are ready, enter the requested information in the fields and click NEXT. You may click on a field title for additional information on how to complete a box.

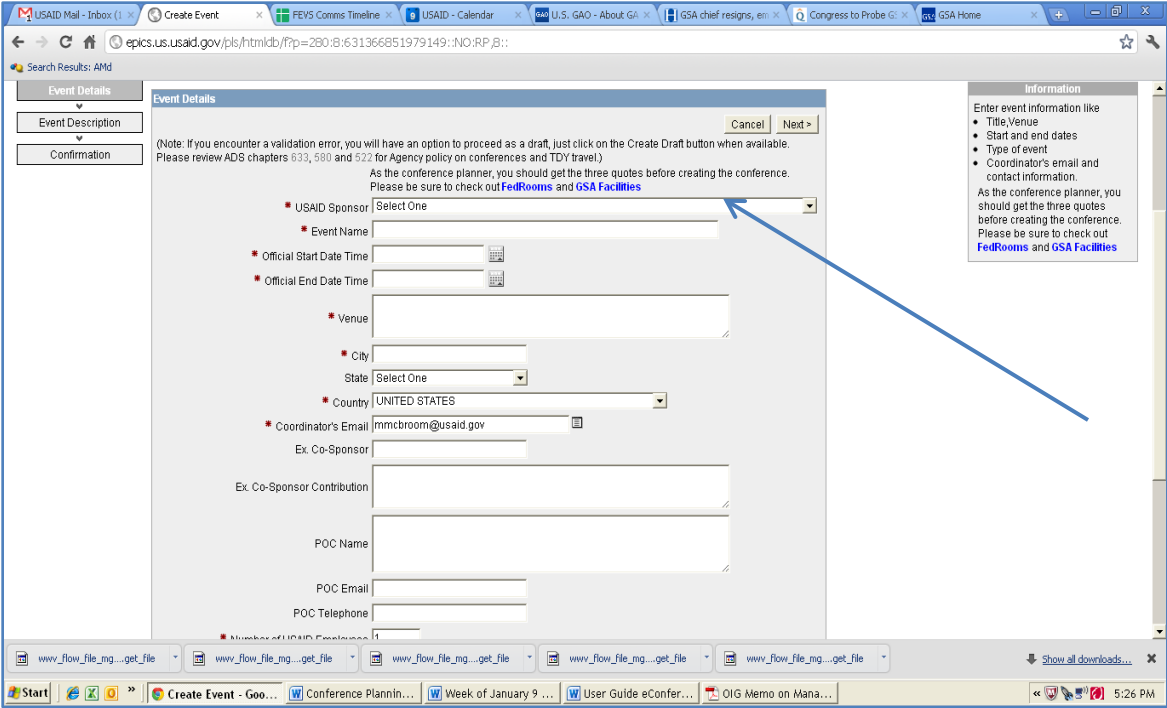


Figure 13: Event Details Screen

6. Select the theme that best describes the event from the drop-down box (See 1 in Figure 14), enter a brief description (See 2) and select the reason that best describes why USAID should fund this event (See 3). You may click on the titles to access additional information. For example, you can view the USAID Forward Agenda by clicking on “Supports USAID Forward Agenda” (See 4).

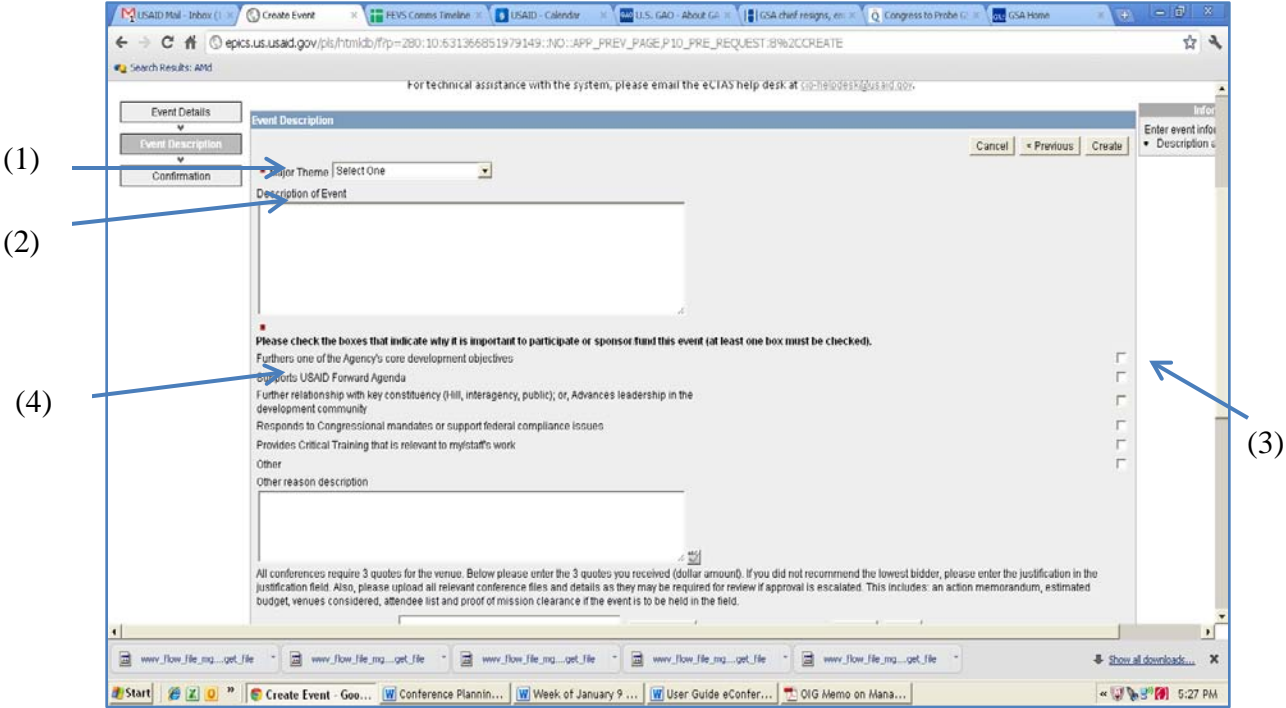


Figure 14: Entering Event Description Screen

- 7. The next section of the page requires cost information (venue and event budget) and supporting documentation which must be uploaded into the system.
- 8. Click on the browse button to upload documents the required documents (action memorandum, venue documentation, attendee list, budget, mission director’s clearance, if required).
- 9. Enter the information regarding the venues considered.
- 10. Click on “Worksheet” (See 1 in Figure 15) to access the budget worksheet. Complete the worksheet, scan it if a signature is required to certify the event as a training activity, and upload the document (See 2). Enter the “Total Conference Cost” where indicated.

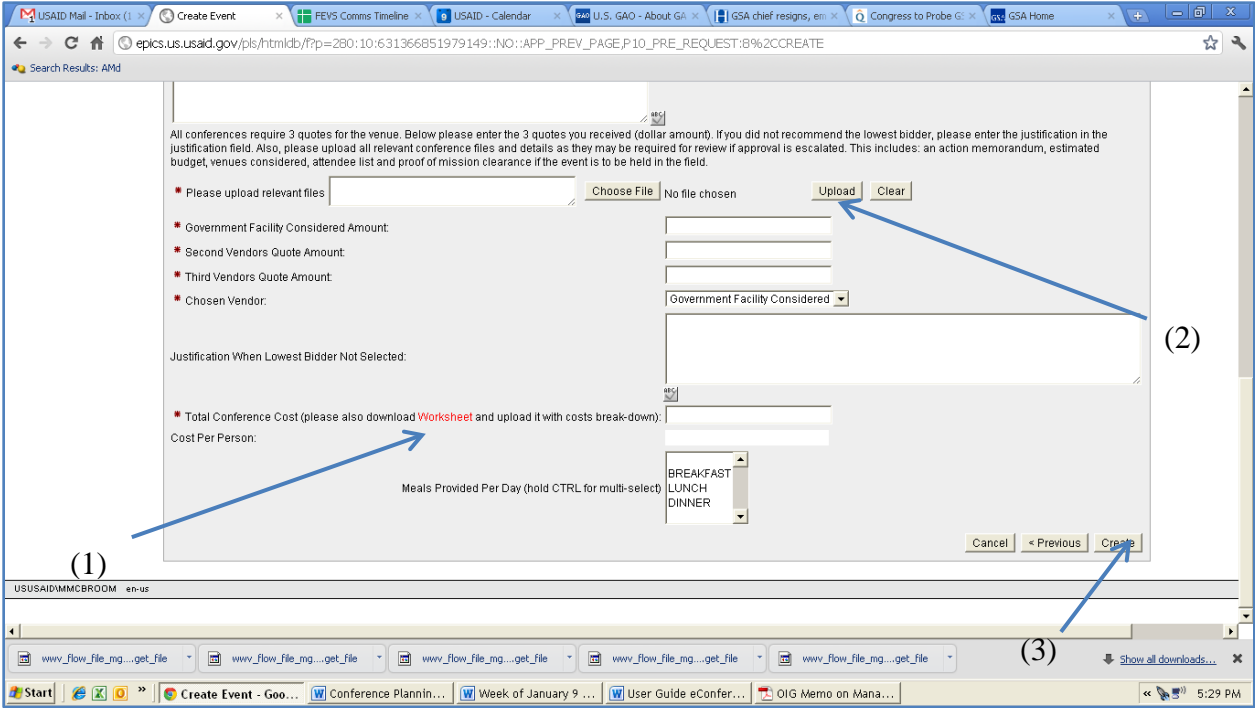


Figure 15: Entering Cost Information

- 11. When all required information has been uploaded, click “Create” (See 3). You may also create a draft if additional information needs to be added.
- 12. Review the details and click “Create” again when all information is verified.

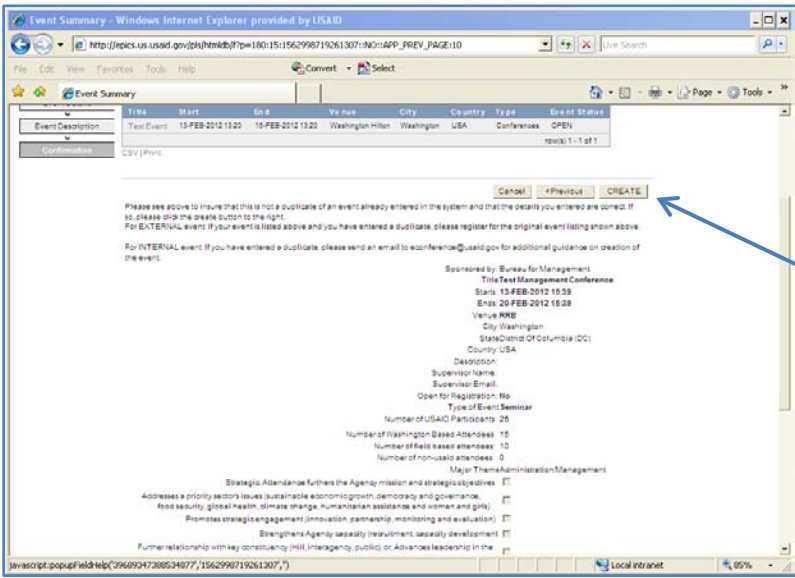


Figure 16: Reviewing Details

13. You are done! You will receive an e-mail acknowledging your request immediately. You will receive the Chief Operating Officer's response to your request within two days.

5. ATTEND USAID CONFERENCE

1. Click the button on the welcome screen to attend a USAID conference. The event coordinator must open the event before the system will accept the event. If the event does not appear, contact the sponsoring office.

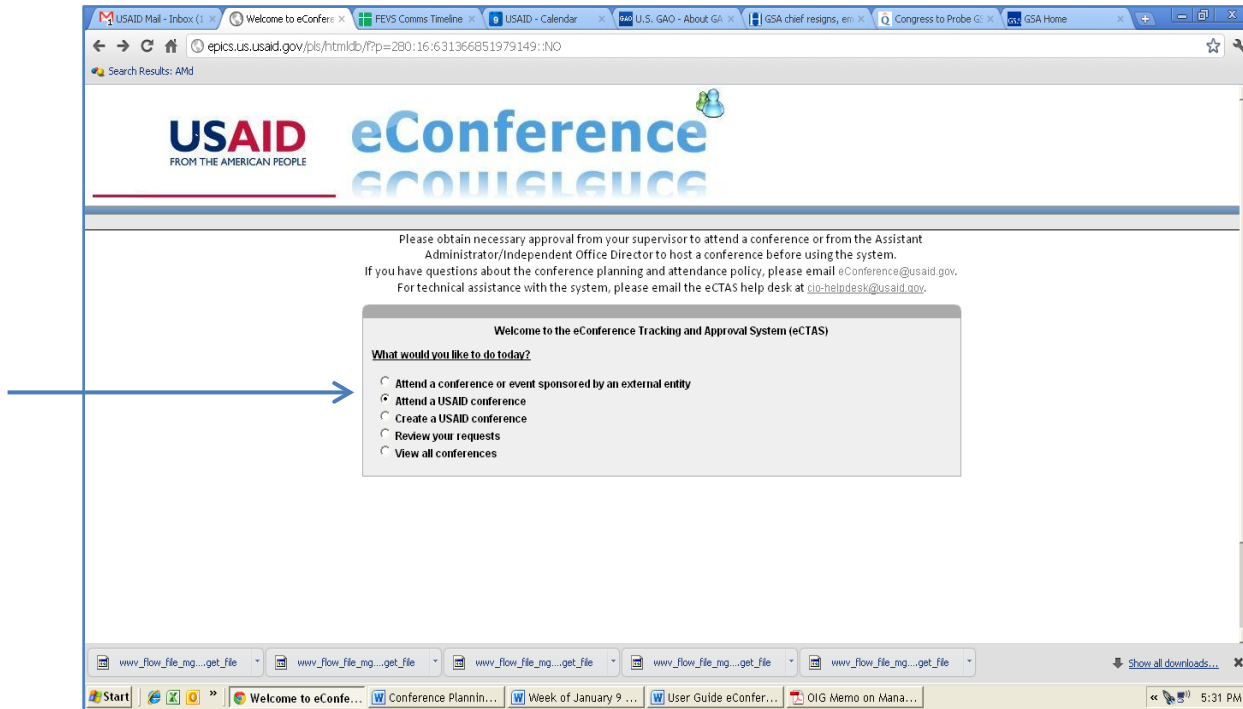


Figure 17: Attend a USAID Conference

2. Log in using your network user name and password
3. Read the policy guidance on conference planning and attendance and click on "I Agree."
4. Select your conference from the list of conferences. You may also use the search capability to locate the conference.



Figure 18: Reviewing Details of Conference

- 5. Review the details of the event to ensure that you have made the right selection.
- 6. Click on the “Request Attendance” button.

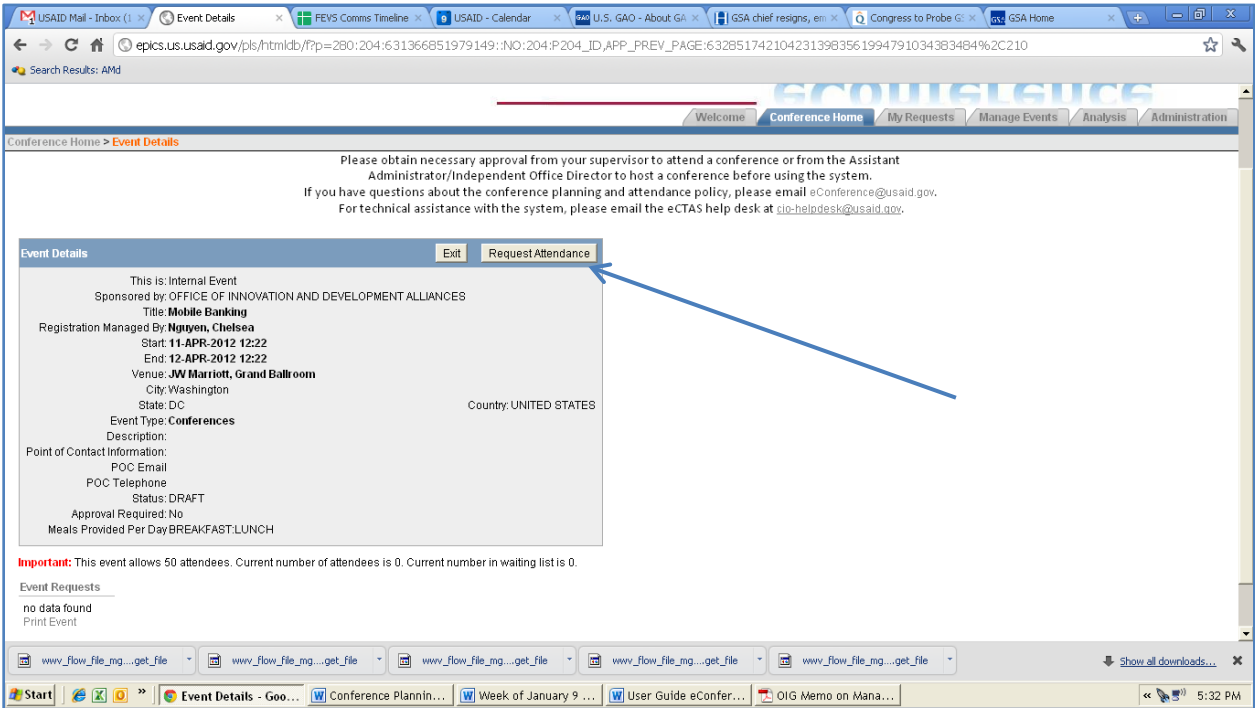


Figure 19: Requesting Attendance Screen

- 7. Fill in the form with the requested information and hit the “Request Attendance” button again. You may click on a field for additional information on how to complete the box.

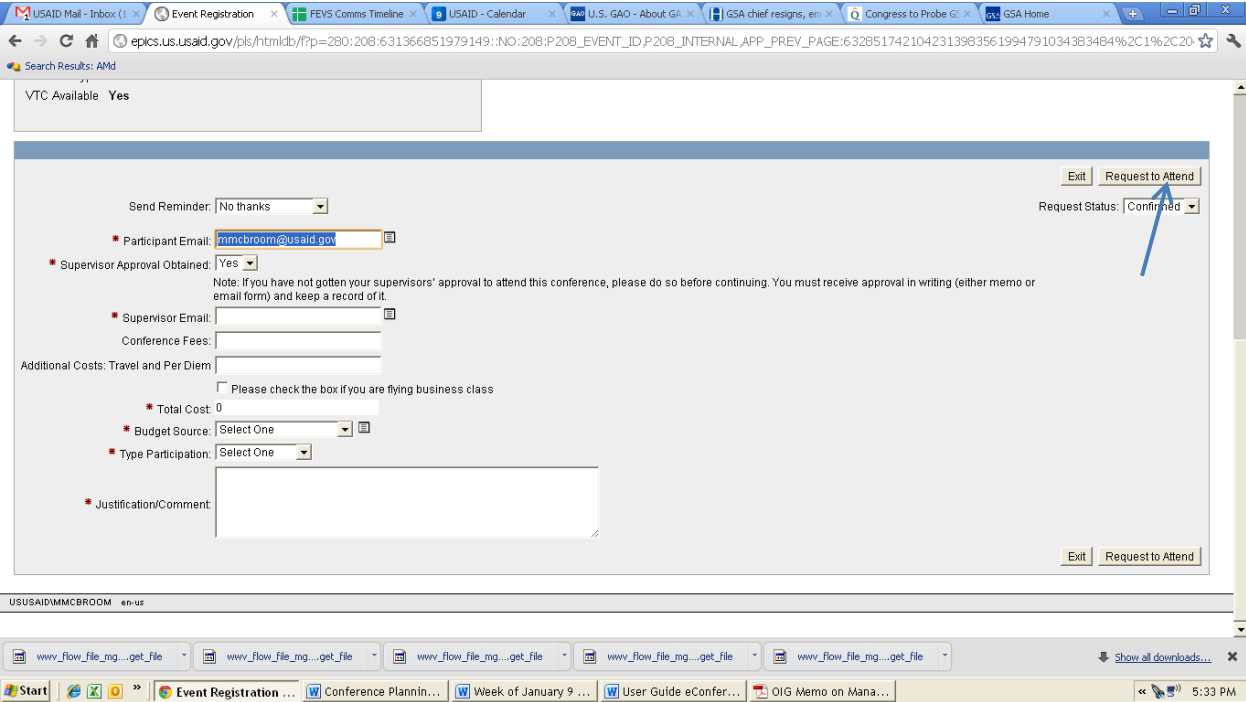


Figure 20: Attendee Details Screen

- 8. You are done! You will receive an e-mail acknowledging your request immediately. A follow-up e-mail will be provided by the event coordinator within two days.

6. REVIEW REQUESTS

1. You can access a complete list of events you have requested by clicking on the “Review Your Requests” button.

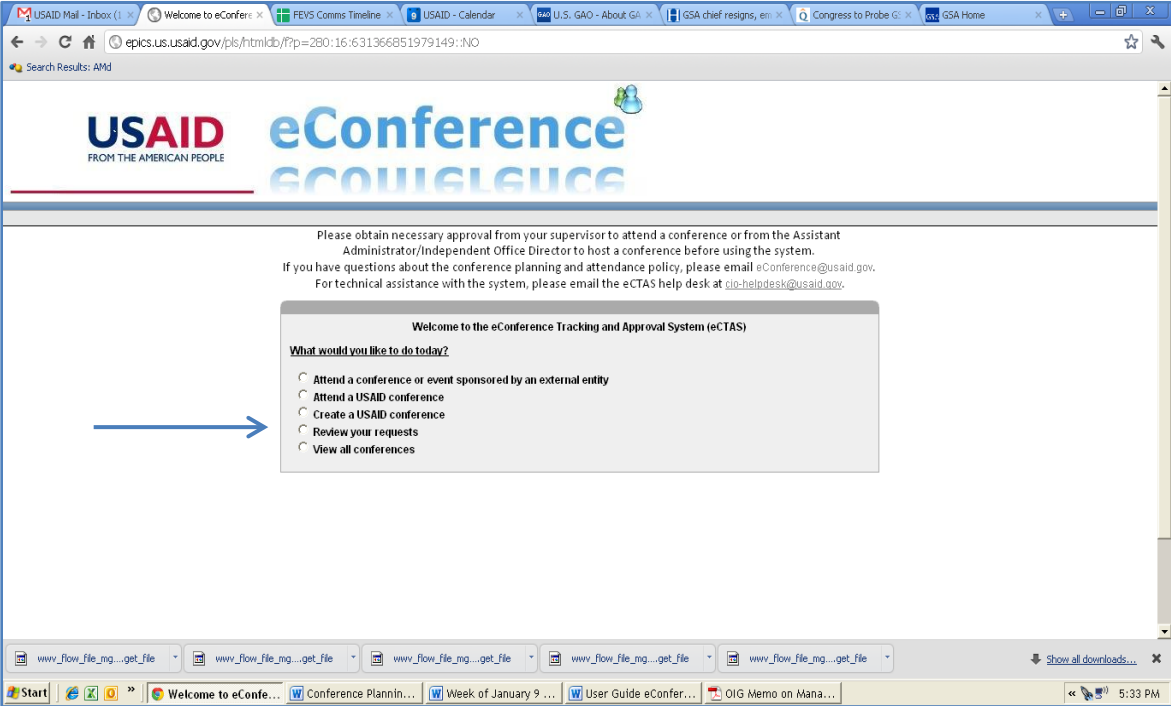


Figure 21: Review Requests

2. You may access the details of the event and see the status by clicking on the name. You may also cancel or update the request.



Figure 22: My Requests Screen

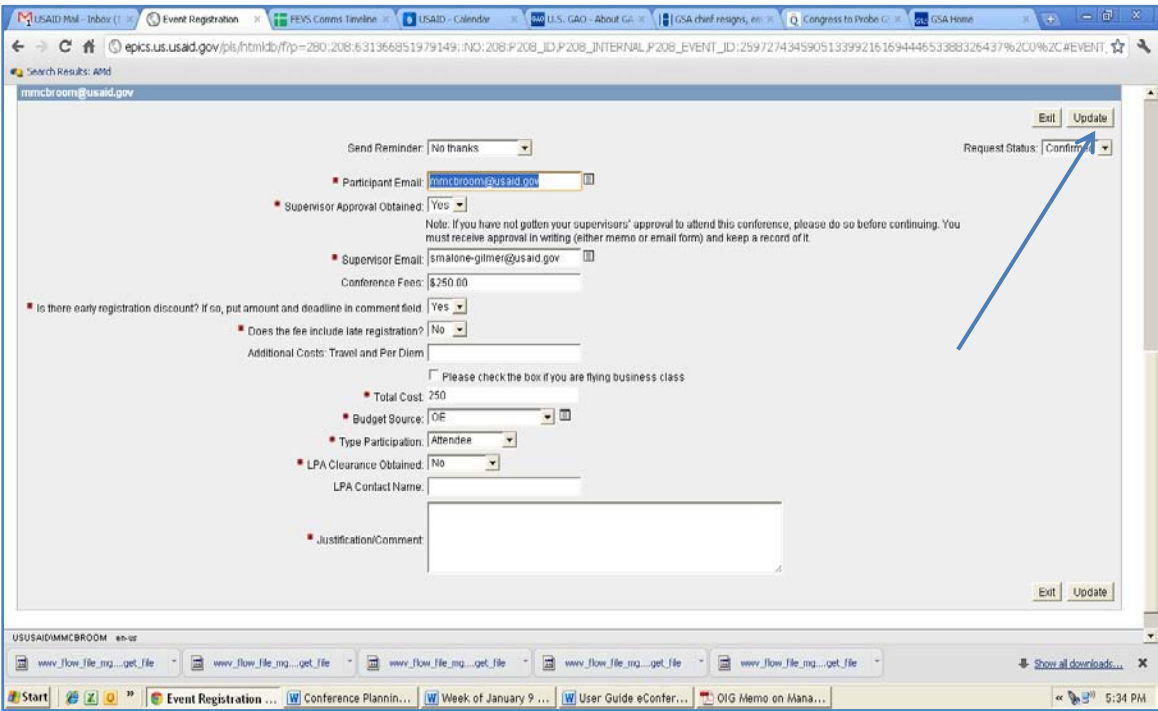


Figure 23: Cancel or Updating Events

7. VIEW ALL CONFERENCES

You may view all conferences in a list or calendar view. To access the details for each, click on the event.

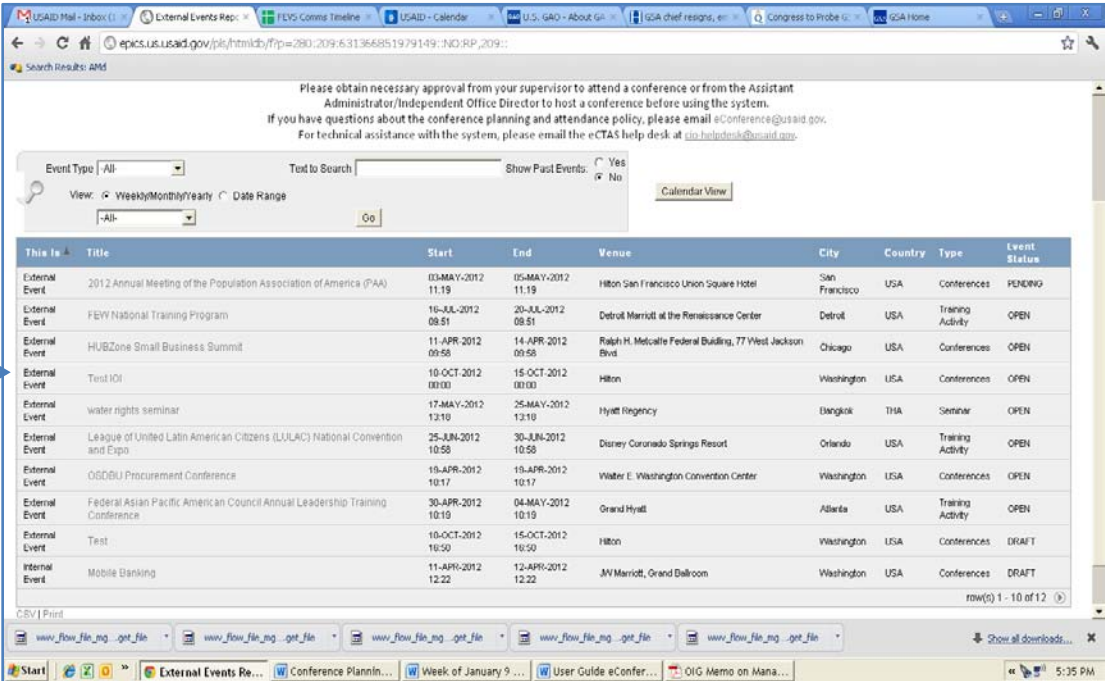


Figure 24: Viewing All External Conferences

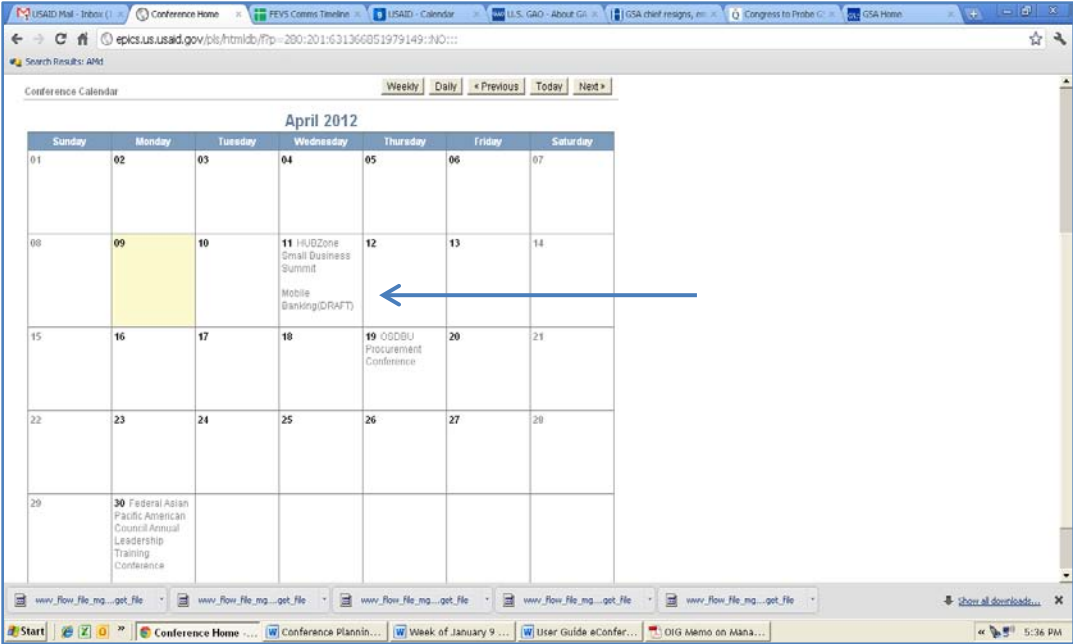


Figure 25: Conference Calendar