



eConference Tracking and Approval System (eCTAS)

User Guide

An Additional Help for ADS Chapter 580

Partial Revision Date: 11/29/2022

Responsible Office: M/MS

File Name: 580saa_112922

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eConference Tracking and Approval System (eCTAS) User Guide

The eConference Tracking and Approval System (eCTAS) is an internet-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.

Approval is required for any USAID-sponsored conference that 10 or more USAID employees are expected to attend. "Conference" does not include certain training events or routine meetings with partners, interagency meetings and meetings among staff held at government owned or leased facilities where no cost is incurred (see [ADS 580, Conference Planning and Attendance](#)). Users must also read and agree to the policy guidance provided in the system.

SYSTEM LOGIN

Login to the eConference Tracking and Approval System at <https://econference.usaid.gov>. Note: The link is also found on [MyUSAID](#) under the tab titled Tools & Resources, under the banner titled Management Services & Tools.

Review the Security/Monitoring Statement and click the "ACCEPT" button to proceed.

WELCOME SCREEN

Welcome to the eConference Tracking and Approval System (eCTAS)

SECURITY/MONITORING STATEMENT

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only.

The USAID, Bureau for Management, Office of the Chief Information Officer is responsible for compliance and enforcement of this policy and, consistent with this authority, may take action necessary to prevent risk to USAID information or information systems. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties.

By using this information system, you understand and consent to the following:

You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the U.S. Government may for any lawful purpose monitor, intercept, search, or seize any communication or data transiting or stored on this information system.

Communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose. Your consent is final and irrevocable. Other statements or informal policies inferring that you have an expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, are not enforceable, except when approved by USAID's Chief Information Officer.

Click "ACCEPT" button to proceed to eCTAS.

Figure 1: Welcome Screen

CREATE A USAID CONFERENCE

1. On the welcome screen the system poses the question, “*What would you like to do today?*” Select the “Create a USAID conference” radial button.

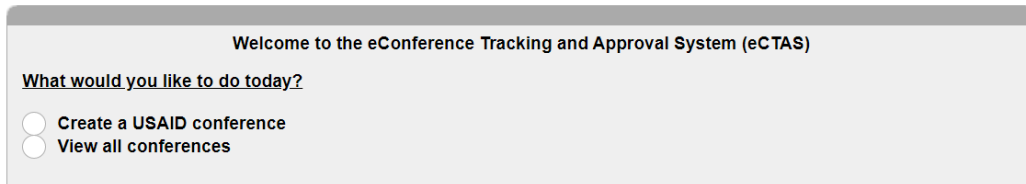


Figure 2: Welcome Screen

2. To verify that the conference must be entered in eCTAS, review [ADS 580](#) before proceeding.

Select “Proceed”

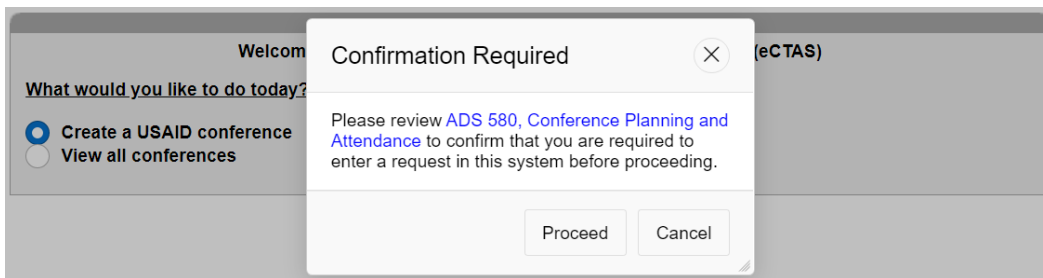


Figure 3: Welcome Screen

3. Review [ADS 580](#) to confirm that you are following USAID’s conference hosting policies.

Click “I Agree”.

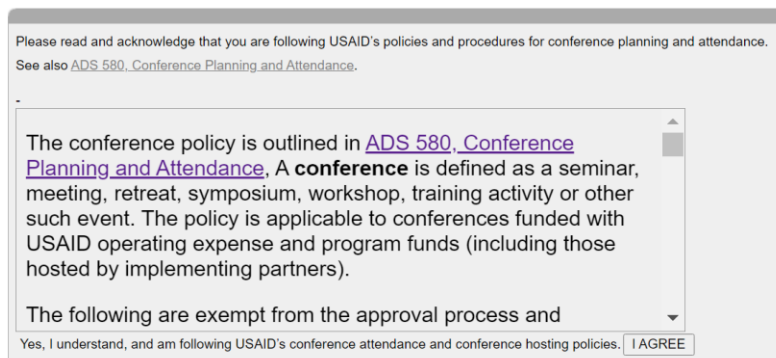


Figure 4: Conference Policy Acknowledgment

4. On the Event Details screen, enter the event information in the fields and click NEXT located in the upper and lower right side of the screen. Fields with a red asterisk are required. Note: Click on a field for additional information on how to complete a box.

The screenshot shows the 'Event Details' form with the following fields and options:

- Buttons: Cancel, Next >
- Note: (Note: If you encounter a validation error, you will have an option to proceed as a draft, just click on the Save Draft button when available and complete all 2 screens for Save Draft to work! Please review ADS chapters 633, 580 and 522 for Agency policy on conferences and TDY travel.) As the conference planner, you should get the three quotes before creating the conference. Please be sure to check out [FedRooms](#) and [GSA Facilities](#)
- * USAID Sponsor: Select One (dropdown)
- Co-Sponsor: Select One (dropdown)
- * Funding Source: Select One (dropdown)
- * Event Name: Text input field
- * Official Start Date Time: Date and time input field
- * Official End Date Time: Date and time input field
- * Venue Country: Select One (dropdown)
- Venue State/Province: Text input field
- * Venue City: Text input field
- Venue Address: Text input field
- * Venue Name: Text input field
- * Coordinator's Email: Text input field with a help icon
- External Co-Sponsor: Text input field
- External Co-Sponsor Contribution: Text input field
- * POC Name: Text input field
- * POC Email: Text input field
- * POC Telephone: Text input field
- * Number of Washington Based Employees: 0 (input field)
- * Number of Field Based Employees: 0 (input field)
- Number of USAID Employees: 0 (input field)
- * Other USAID Funded Attendees: 0 (input field)
- * Number of Other Attendees: 0 (input field)
- Total Number of Attendees: 0 (input field)
- * VTC Capability Available: Yes (dropdown)
- Buttons: Cancel, Next >

Figure 5: Event Details Screen

5. Enter the major theme, description, and the reason the Agency should sponsor the conference.
 - 1) From the drop-down box, select the major theme that best describes the event.
 - 2) Provide a brief description of the event. Do not enter personally identifiable information (such as a keynote speaker's name).
 - 3) Check the box that best describes why USAID should fund the conference.

Event Description

Cancel < Previous Save

(1) → Major Theme ▼

Description of Event

(2) →

(3) → **Please check the boxes that indicate why it is important to participate or sponsor/fund this event (at least one box must be checked).**

Furthers one of the Agency's core development objectives
 Further relationship with key constituency (Hill, interagency, public)
 Advances leadership in the development community
 Responds to Congressional mandates or supports federal compliance requirements
 Provides critical training that is relevant to an employees work
 Other
 Other reason description

Figure 6: Event Description

6. Upload the conference approval package and enter venue information.

- 1) Upload the conference approval package and any other supporting documentation by clicking on “Choose File” button, selecting the document(s) (action memorandum, venue documentation, attendee list, budget, and if applicable the Mission Director’s clearance), and then click the “Upload” button.
- 2) Enter the facility and venue information, and if the lowest bidder was not selected provide a justification. Note: To complete the process, three venue quotes are required (with at least one being a U.S. Government facility where available). 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.

All procurements related to the conference must be in compliance with the Federal Acquisition Regulation (FAR). Three quotes must be obtained for the conference venue unless exceptions apply. Conference organizers must work with the responsible contracting officer or purchasing official to ensure compliance with the FAR. In accordance with the Federal Travel Regulation (FTR) government facilities must also be considered if available at a cheaper rate than a commercial facility. Quotes must be obtained for government facilities where available. The three quotes are not required if a suitable government facility is available at no cost.

(1) → Please upload relevant files Choose File No file chosen Upload Clear

(2) → Government Facility Considered Amount: Facility Name:

First Vendors Quote Amount: Vendor Name:

Second Vendors Quote Amount: Vendor Name:

Third Vendors Quote Amount: Vendor Name:

Chosen Vendor: ▼

Justification When Lowest Bidder Not Selected:

Figure 7: Venue Quote Comparison Section

- Calculate salary cost by entering the number of U.S. Direct-Hires (Civil Service, Foreign Service, Personal Service Contractors, Detailees), and Foreign Service National (FSN) and Third Country National Personal Service Contractor (TCN) attendees.

* USDH/PSC/Detailee:	<input type="text" value="0"/>
* FSN/TCN Attendees:	<input type="text" value="0"/>
* Salary Cost:	<input type="text" value="0.00"/>

Figure 8: Salary Calculation

- Enter the conference’s budget and funding breakdown and click the ‘Save’ button to save the entry.

Meals Provided Per Day (hold CTRL for multi-select)

BREAKFAST
 LUNCH
 DINNER

Meals will not be provided to local staff.
 Meals will be provided to local staff. Essential training will be conducted and the conference meets the criteria outlined in ADS 580.3.3.2.
 Meals will be provided to local staff in accordance with criteria outlined in ADS 610.

* Travel & Per Diem Costs:	<input type="text" value="0"/>
* Conference Venue:	<input type="text" value="0"/>
* Meals/Refreshments:	<input type="text" value="0"/>
* Facilitators (including level of effort, travel and per diem):	<input type="text" value="0"/>
* Computer and Telephone Access Fees:	<input type="text" value="0"/>
* Printing:	<input type="text" value="0"/>
* Other:	<input type="text" value="0"/>
* Total Direct Cost:	<input type="text"/>
Cost Per Person:	<input type="text"/>
* Funding (OE):	<input type="text"/>
* Funding (Program):	<input type="text"/>
* Funding (Other):	<input type="text"/>
Approved Amount:	<input type="text"/>
Cost Savings:	<input type="text"/>

Figure 9: Budget Breakdown

- When all required information has been entered, click “CREATE”. You may also create a draft if additional information needs to be added.

Verify information and click “CREATE” again. You are done! You will receive an email acknowledging your request immediately.

VIEW ALL CONFERENCES

From the Welcome Screen, select View All Conferences. eCTAS offers a search engine and allows you to view conferences in list view or calendar view.

Search Engine

Internal/External Event Type Text to Search

Show Past Events: Yes No

View: Weekly/Monthly/Yearly Date Range

Figure 10: Search Engine

Calendar View

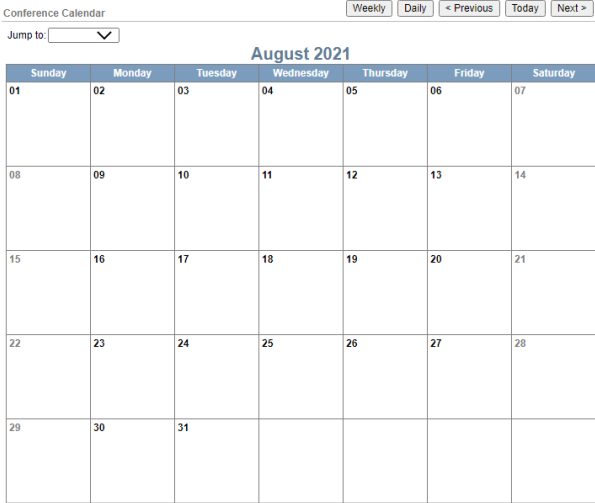


Figure 11: Calendar View

ADDITIONAL HELP

For additional help, please email eConference@usaid.gov.

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