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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.

<table>
<thead>
<tr>
<th><strong>Key System Users</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Submitter</strong></td>
</tr>
<tr>
<td>User responsible for creating standard conference requests</td>
</tr>
<tr>
<td><strong>Approver</strong></td>
</tr>
<tr>
<td>User responsible for approving conference requests and annual conference at the agency and sub-agency level</td>
</tr>
<tr>
<td><strong>Agency Point of Contact</strong></td>
</tr>
<tr>
<td>Agency level “Super Users” responsible for approving user requests, creating sub-agencies, conference names, annual plans, as well as approval authority on conference requests</td>
</tr>
<tr>
<td><strong>OCFO</strong></td>
</tr>
<tr>
<td>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</td>
</tr>
</tbody>
</table>

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](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/](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**.
5. For the **Agency** and **Access Request Type** fields, users will select the appropriate values from the drop down menus.
6. 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.

7. 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.
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

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 to grant access for a specific user through the Agency POC’s 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 will log into the system to review the pending user access request. In addition to being notified of pending access requests via email, Agency POCs will also see their pending access user requests on their homepage dashboard in AgCMS.

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.

![AgCMS POC Dashboard](image)

*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.

![Grant User Access form](image)

*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: POCs can only grant access for agencies they have 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 the 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.

   ![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.
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.

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.
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.*

![New Account: Agency Form](image1)

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.

![OCFO Approvers](image2)

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

<table>
<thead>
<tr>
<th>Threshold Value</th>
<th>Required Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;$450,000</td>
<td>USDA Deputy Secretary</td>
</tr>
<tr>
<td>$75,000 - $449,999</td>
<td>General Officers / Under Secretaries</td>
</tr>
<tr>
<td>$40,000 - $74,999</td>
<td>Agency/Staff Office Head or Senior Accountable Travel Official (SATO)</td>
</tr>
<tr>
<td>$0 - $39,999</td>
<td>Agency/Staff Office Head, SATO, or Delegated Authority</td>
</tr>
</tbody>
</table>

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 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.*

![Add A New Agency Approver](image)

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](image)

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.

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.

Note: Sub Agency has Active Routing List is a mandatory field and it can be activated only
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.

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.

   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
e. Click on the **Create Sub Agency Approver**.

![Create Sub Agency Approver](image)

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

![Agency Approvers](image)

4. Select **Sub Agency Has Active Routing List** Option after adding all the approvers.
5. Click on **Save** to activate the Sub Agency.

**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

1. 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)

2. 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.

F. Manage Sub Agencies Details (Agency POC)

1. 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)
### Sub Agencies (6+)

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Sub Agency Has Active Routing List?</th>
<th>Number of Approval Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>✓</td>
<td>1</td>
</tr>
<tr>
<td>Alaska</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arizona</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arkansas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business Center Operations Office</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>California</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Edit Business Center Operations Office**

- **Account Name**: Business Center Operations Office
- **Parent Account**: RD

**Number of Approval Orders**: 3

**Include SATO Agency Has Under 40K**: ✓

**Parent Agency**: RD

[Save]
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.

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.

<table>
<thead>
<tr>
<th>My Annual Plans</th>
<th>Feed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Plan</td>
<td>Status</td>
</tr>
<tr>
<td>AMS - 2021 - Annual Plan</td>
<td>Developing Plan</td>
</tr>
<tr>
<td>AMS - 2022 - Annual Plan</td>
<td>Developing Plan</td>
</tr>
<tr>
<td>RMA - 2021 - Annual Plan</td>
<td>Developing Plan</td>
</tr>
<tr>
<td>AMS - 2020 - Annual Plan</td>
<td>Developing Plan</td>
</tr>
<tr>
<td>RMA - 2020 - Annual Plan</td>
<td>Developing Plan</td>
</tr>
</tbody>
</table>

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

![Annual Plan List View](image)

C. **View Annual Plan Page**

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

1. There are two levels of Annual plans:
   a. **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.
   b. **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.

2. Items on the Annual Plan Page:
   a. **New Annual Plan Conference Button** – This button can be used to add a conference to an annual plan manually.
   b. **Compact Layout** – The compact layout is located at the top of the page and displays fields from the Annual Plan record.
   c. **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.
   d. **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 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.
e. **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.

f. **Annual Plan Tabs**– Please see the next section to understand what information is held on each tab.

g. **List of Annual Conferences**– This component displays all associated Conference Requests with this Annual Plan *(see screenshot on next page)*
h. **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](image)

• **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.

![Approval History Section](image)

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

![Manual Entry Fix Section](image)

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 **New 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;
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;
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.

![Image of the New Annual Plan Conference](image1.png)

![Image of Conference CR-0625](image2.png)

3. Adding Conferences using Upload Functionality
   a. 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)*.
   b. Only enter information in **column B or C**
   c. Do not leave rows blank between entry
   d. Ensure that the date fields to the Date format on the xlsx file

```plaintext
<table>
<thead>
<tr>
<th>Conference Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Number of Attendees</th>
<th>Conference Type</th>
<th>Sponsor, Host, At...</th>
<th>Status</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Corp Annual Plan</td>
<td>Dec 24, 2020</td>
<td>Jan 5, 2021</td>
<td>25</td>
<td>55,000.00</td>
<td>Training</td>
<td>Sponsor</td>
<td>On-Annual Plan</td>
</tr>
</tbody>
</table>
```

---

**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 not leave rows blank between entries
- Check for errors before converting to an xlsx file for upload

<table>
<thead>
<tr>
<th>Conference Type</th>
<th>Conference Name</th>
<th>Manual Entry Conference Name</th>
<th>Sponsor</th>
<th>State</th>
<th>City</th>
<th>Start Date</th>
<th>End Date</th>
<th>Number of Attendees</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training</td>
<td>Conservation Planning Training</td>
<td>Sponsor Alabama Montgomery</td>
<td>6/20/2020</td>
<td>5/21/2020</td>
<td>100</td>
<td>10000.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

![Image showing the upload results page]

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.

![Image showing the upload results page]

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

**Note: All manual entry conference should be fixed prior to submitting the annual plan for review.**

![Image showing the conference details]

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.
I. 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.

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 spreadsheet 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.
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.
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 USDA 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 OCFO/USDA approval has completed. Once approved by the Deputy Secretary, the individual agency plans will be approved.
6. If the User is not one of the approvers designated on the Available approvers list, they will not see the approval buttons.
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.

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**.

   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**.
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.

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.
5. **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: 12
Total Cost: $50,000

Count of High Cost Conference: 4
Manual Entry Fix Count: 2
Last Updated at: 12/20/2020, 7:43 PM

### Annual Conferences

<table>
<thead>
<tr>
<th>Annual Plans (4)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Annual Plan Name</th>
<th>Agency</th>
<th>Fiscal Year</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>OSC Agency Plan 2021</td>
<td>OSC</td>
<td></td>
<td>Approved</td>
</tr>
<tr>
<td>OSC Agency Plan 2021</td>
<td>AMS</td>
<td></td>
<td>Developing Plan</td>
</tr>
</tbody>
</table>
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.
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.

   ![Image of Conference Name Edit Page]

   b. Click the Pencil Icon next to the active box and uncheck it.

   ![Image of Conference Name Deactivated]

   *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

**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.
General Conference Information

Conference Details:
- Estimated Start Date: Jan 4, 2021
- Estimated End Date: Jan 11, 2021

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

Purpose:
- Final inspection conference to review annual financial report

Justification:
- Final inspection conference to review annual financial report

Event Type:
- Conference
- Training
- Operational

Continuing Professional Education:
No

Will your agency be hosting a booth U.S. Department otherwise at the event?
No

Does this event meet the definition of a “conference” in Appendix C to Chapter 36 of the Federal Travel Regulations and 3 USC 101, et seq.
Yes

Appendix C to Chapter 36 of the Federal Travel Regulation and 3 USC 101, et seq.

What topics (if any) does your agency in the conference?

- Attendance
- Exhibits
- Media
- Partners
- Speakers
- Sponsor(s)

- Upload Conference Agenda

Conference Website:
https://example.com

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)

Ok
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.
5. 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.

6. 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.
7. 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**.

8. The submitter can either make further edits by clicking on the **Edit Conference Information** button to navigate back to the from, 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.
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.

9. A message appears on the screen after a successful submission. The submitter will also receive an email notification with a Conference Request Link.
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](#)

---

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. 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
   a. 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.
b. 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.

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

![USDA Conference Management System](image)

Conference Arizona Department of Forestry Annual Planning Meeting has been submitted and is pending your review, please navigate to Conference Request Link to approve.

*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.
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.
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.
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.
9. **Post Conference Details tab** will be blank until the conference is ready for post conference details input.

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.

![Conference Approvals](image)

**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.

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 disabled and can only be reactivated by copying the conference request and starting the process over.

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.
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/shereturns.*

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 following email:

![USDA Conference Management System]

Post conference details for conference CR-0591 is ready for input.

Please navigate to this link to input actuals; Conference Request Link

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 the actuals and estimates.
   b. Mission Impact: When the event is 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.
**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.

-**END**-
VIII. 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 ☑️ Remove Column.
   b. Alternatively, from the preview pane, find the column you want to remove.

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](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.

![Chatter Feature Image](image)

- 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**
   - 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**
   - 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
   a. 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.

2. List View Buttons
   a. Select a list view from the dropdown menu. Pin a list with " to set it as your default.
   b. Edit, delete, or create a list view using the List View Controls menu .
   c. View a list in different ways. Visualize list view data using charts with and refine which records are displayed using filters with .
   d. Depending on the object, you can switch between the standard table view and the Kanban view.
   e. Search a list view for the data you need.

3. Create or Clone a List View
   a. 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.
• Select the proper filter for the List View to display the desired records.

• 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.
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.
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

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

1. Select Yes or No.
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

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

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.
1. Select the facility type. “Commercial Facility” prompts for a justification.
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).

<table>
<thead>
<tr>
<th>CITY AND STATE OF EVENT</th>
<th>ENTER LOCATION Abb.</th>
</tr>
</thead>
<tbody>
<tr>
<td>PER DIEM RATES - LODGING</td>
<td>$0.00</td>
</tr>
<tr>
<td>PER DIEM RATES - MEAL</td>
<td>$0.00</td>
</tr>
<tr>
<td>LOCATION OF EVENT</td>
<td></td>
</tr>
<tr>
<td>TYPE OF FACILITY</td>
<td>SELECT IN FACILITY</td>
</tr>
<tr>
<td>1. AIRFARE</td>
<td>$0.00</td>
</tr>
<tr>
<td>2. LOCAL/STD TRANSPORTATION EXPENSE</td>
<td>$0.00</td>
</tr>
<tr>
<td>3. MISCELLANEOUS</td>
<td>$0.00</td>
</tr>
<tr>
<td>4. TOTAL LODGING</td>
<td>$0.00</td>
</tr>
<tr>
<td>5. TOTAL MEAL</td>
<td>$0.00</td>
</tr>
<tr>
<td>TOTAL TRAVEL EXPENSES</td>
<td>$0.00</td>
</tr>
<tr>
<td>6. FACILITY/ROOM RENTAL</td>
<td>$0.00</td>
</tr>
<tr>
<td>7. FOOD AND BEVERAGES</td>
<td>$0.00</td>
</tr>
<tr>
<td>8. PROMOTIONAL MATERIALS</td>
<td>$0.00</td>
</tr>
<tr>
<td>9. SPEAKER/TRAINER FEES</td>
<td>$0.00</td>
</tr>
<tr>
<td>10. OTHER COSTS - FTDOD</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
1. Prepopulated from section General Conference Information.
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

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.
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.
IX. 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 I 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 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.