



Standard Operating Procedures (SOPs) in the ADS

An Additional Help Document for ADS Chapter 501

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The following are links to Standard Operating Procedures (SOPs) referenced throughout the ADS.

ADS Chapter 302, USAID Direct Contracting and ADS Chapter 303, Grants and Cooperative Agreements to Non-Governmental Organizations mention the following SOP:

- [USAID Federal Acquisition Professional Accreditation & Re-Certification Program Standard Operating Procedure \(SOP\)](#)

ADS Chapter 331, Simplified Acquisitions, Micro-purchases, and Use of the USAID Worldwide Purchase Card mentions the following SOP:

- [Exhibit 6: Boilerplate Standard Operating Procedures for Overseas Purchase Card Program](#)

ADS Chapter 467, Federal Employees Pay Authorities and Flexibilities mentions the following SOP:

- [Information Technology \(IT\) Skills Incentive Program \(SIP\) Standard Operating Procedure Manual](#)

ADS Chapter 508, Privacy Program mentions the following SOPs:

- [ADS 508maa, USAID System of Records Notice Template](#)
- [ADS 508mac, USAID Privacy Impact Assessment Template](#)
- [ADS 508mag, Privacy Act Section \(e\)\(3\) Statement or Notice Template](#)
- [ADS 508mah, USAID Open Data Privacy Analysis Template](#)
- [ADS 508mai, USAID Privacy Program Breach Notification Policy and Plan](#)
- [ADS 508maj, USAID Privacy Threshold Analysis Template](#)
- [ADS 508mak, USAID Public Web Site Privacy Policies Requirements](#)

ADS Chapter 548, Program-Funded Independent Verification and Validation (IV&V) Reviews mentions the following SOP:

- [ADS 548mab, Standard Operating Procedure Reference Guide](#)

ADS Chapter 522, Performance of Temporary Duty Travel in the U.S. and Abroad

- [E2 Travel Management Service User Guide](#)

ADS Chapter 601, Funding Source Policy mentions the following SOP:

- [ADS 601maa, Cost of Doing Business](#)

Below are copies of Standard Operating Procedures from Bureaus/Independent Offices

- 1) Standard Operating Procedures for USAID E2 HelpDesk (M/MS/TTD)**



Standard Operating Procedures
for
USAID E2 HelpDesk

HELP DESK TOOLS AND TECHNOLOGY

SERVICENOW CASE MANAGEMENT SYSTEM

OVERVIEW

ServiceNow tickets are opened for all emails, voicemails, phone calls, walk-ins, and forms received by the E2 Help Desk. All CIO tickets regarding E2 Solutions will be assigned in ServiceNow in an expeditious fashion to the E2 Help Desk staff and are to be updated for status changes on a daily basis.

LOGGING A CASE

Travel System Analysts will receive, log and resolve all walk-in request for assistance, incoming telephone, and e-mail requests. A unique tracking ID will be assigned to each request entered into ServiceNow. The number will be referenced in all subsequent communications for tracking purposes. Help Desk team members will assign a priority based on the following guidelines:

URGENT

HIGH

MEDIUM

LOW

LOGGING INTO SERVICENOW

Travel System Analysts will record the issue information into ServiceNow. The following information is required when entering a ServiceNow ticket:

- Requester Name
- Office Affiliation
- Location
- Detailed Description of the problem or issue
- Priority
- Date call received
- Time call received

CASE LOGGING PROCEDURES

CASE ESCALATION

OVERVIEW

The Travel System Analysts will be expected to respond to issues according to the order in which they are received, status, and assigned priority. The analyst may change the priority as needed. However, such changes will be communicated to the requestor as

soon as they are made via ServiceNow. Urgent requests will be given top priority for immediate support. Other requests will be addressed according to the assigned priority, and the age of the request.

ESCALATION FLOW

If a request requires higher-level assistance, the Travel System Analyst will escalate the ticket to the senior team member and Help Desk Supervisor. The Analyst is responsible for notifying the requestor when an issue has been escalated.

The Help Desk Supervisor or team leader will determine if a resolution can be reached, or whether the ticket needs to be further escalated. If the issue can be resolved without further escalation, the Help Desk Supervisor will assign the ticket to a member of their team. The assignee will update the customer until the matter is resolved and close the ticket after notifying the team lead or supervisor

Diagram should be provided for standard case flow. Provide flow charts for handling system outages or other specific types of cases handled by the Help Desk.

E2 USER ACCOUNT AUDITING GUIDELINES

INTRODUCTION

E2 user accounts must be audited periodically. Auditing is necessary to:

- Verify that users have only those access permissions that their managers have specified,
- Verify that accounts are being used properly, and
- Detect and prevent security incidents.

On a quarterly basis, the E2 system administrator will run the USR002R 'Users Settings and Profile' report. The E2 system administrator will verify the last login date and will disable inactive accounts over 90 days old. The E2 system administrator will notate the reason for the disabled account in the employees' E2 profile. Additionally, the E2 system administrator will close accounts which appear on the employee separation report.

Removing and Deactivation a User

There are a number of reasons why an account must be removed or deactivated. For example, if a traveler has a duplicate account, if a traveler has left the agency or if a traveler has not logged in over 90 days their account will need to be removed or deactivated. When determining whether to remove or deactivate a user account you must always check the traveler's documents.

If the traveler has documents associated with their account, the account cannot be removed.

If a traveler does not have documents associated with their account, the account can be removed.

Procedures

Search for the traveler. To remove their account from the E2 system, click the **Delete** link.

Administration Options

- User Maintenance
 - Settings
 - Initialize/Unlock Users
- Approval Routing
 - Pending Approvals
 - Routing Admin Groups
 - Routing Templates
 - Routing Pools
- Customer Settings
 - Hierarchy Settings
 - Minor Settings
 - Major Settings
 - Organization Settings
 - Agency Settings
- Financial Settings
 - Account Codes

User Search

Search Options

You have no active customer search options(s) - [Advanced search options](#)

Last Name : First Name : E2 User Id :

User Type : Admin Level :

Order By:

Name	E2 User Id	User Type	Admin Level	Major Customer	Minor Customer	Delete
GARCIA, LUIS	GARC7321	Approver	No Privilege	Mission Honduras	Tegucigalpa Financial Mgmt Ofc	<input type="button" value="Delete"/>

Another screen will appear to allow you to delete the account.

Administration Options

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 - Hierarchy Settings
 - Minor Settings
 - Major Settings
 - Organization Settings
 - Agency Settings
- Financial Settings
 - Account Codes

Delete User

User Information

Account Status: Traveler is Active
Last login was on: Thu, 24 Feb 2011 9:24 AM CST
User Status: Enabled
Login: GARC7321
Name: LUIS A GARCIA
Primary Email: luisgarcia@usaid.gov
Employee ID: L12660017
SSN: [redacted]

Click the **User Settings** link to search the traveler's name to confirm the delete was successful.

To disable the account, click on the traveler's name after searching for them and select **Disable** and then the **Save** button towards the bottom right of the screen.

Administration Options
User Maintenance
User Settings
Initialize/Unlock Users
Approval Routing
Pending Approvals
Routing Admin Groups
Routing Templates
Routing Pools
Customer Settings
Hierarchy Settings
Minor Settings
Major Settings
Organization Settings
Agency Settings
Financial Settings
Account Codes
Delinquent Advances
Expense Mapping
Financial System
Fund Maintenance

User Settings

Basic Information

Account Status: Traveler is Active [Initialize/Unlock User](#)

Last login was on: Thu, 24 Feb 2011 9:24 AM CST

User Type: Approver

E2 User Id: GARC7321 [Edit Profile](#)

First Name: LUIS

Middle Initial: A

Last Name: GARCIA

Suffix:

Employee ID: L12660017

SSN:

User Status: Enabled Disabled

Reason Disabled: Separation

Primary Email: luisgarcia@usaid.gov

Alternate Email:

Alternate Email:

The following terms may be used when disabling an account:

- Resignation
- Retirement
- Removal
- Separation
- Termination
- Deceased

****Note: An E2 Change Request Form is needed to process a request to move or deactivate a traveler's account.**

SERVICE LEVEL REPORTING

REPORTS

The E2 Help Desk Travel System analysts may be asked to create ServiceNow reports based on criteria such as status, priority, open date, and close date. Such reports may be run daily so that the Supervisor can monitor service request status, and provide the most timely customer service possible. Additionally, the E2 Help desk may develop ServiceNow reports that will measure help desk effectiveness, based on our established criteria for issue resolution. These reports will be run at the end of the month, or on an ad-hoc basis. The E2 Help Desk Team may also create reports to provide information about areas where additional documentation or training for the end-user might be necessary.

The E2 Help Desk Team will provide monthly reports on Business Class Travel, Open and Closed Authorization/Voucher status and other reports as requested. The business class and ServiceNow report will be provided to the client on or around the 10st of the month.

Severity	Description	Run Time	Due Time
1	ServiceNow Report	10th of the month	10th of the month
2	Business Class Report	10th of the month	10th of the month
3	E2 Newsletter		As required

 **SIGN-OFF SHEET**

I, _____ understand and will follow all procedures set forth in
this document.

Travel System Analyst

Date

Signature

Help Desk Manager

Date

Signature