Standard Operating Procedures Manual

MyUSAID.gov User Governance Guide

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Introduction

The following manual contains Standard Operating Procedures (SOPs) that are designed to make recommendations and give guidance to users of MyUSAID.gov about the proper processes and protocols surrounding MyUSAID.gov.

The SOPs contained herein lay out the various platform functions, and roles and responsibilities of applicable parties, so that users can ascertain the different ways their Operating Unit might make the best use of the platform.

Please note that this manual is considered as a "living document" which can evolve as the platform and user experience evolves.

We invite feedback and encourage you to send your comments to IMI@usaid.gov.

User Profile Information
Standard Operation Procedure (SOP)

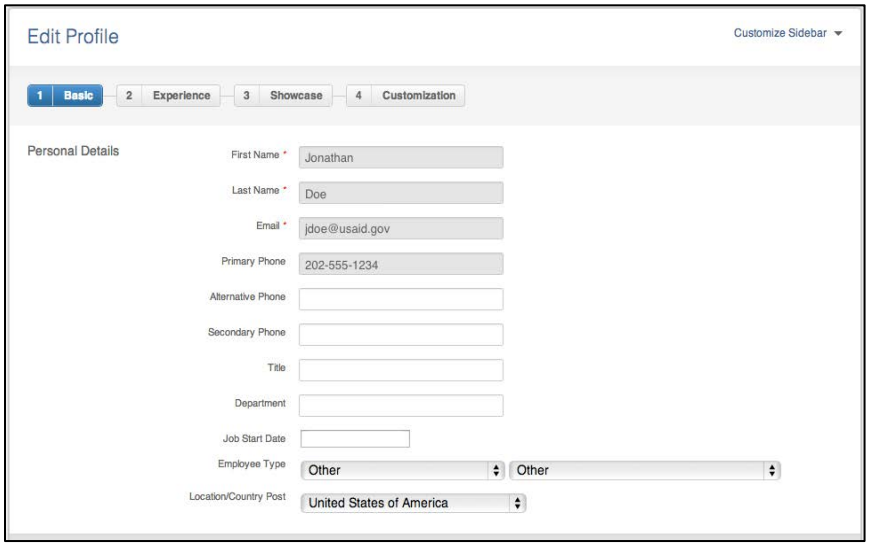
1. **Purpose.** Provide information and edit capability for User Profiles in MyUSAID.gov.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov users must adhere to the information provided in this SOP regarding their User Profiles in MyUSAID.gov.

5. **Guidance.** Below is the guidance on the Mandatory and Voluntary Profile Fields in MyUSAID.gov. Profile fields can be found in the MyUSAID.gov portal by clicking the user name at the top of the page and navigating to "Edit Profile." The Mandatory profile information will be auto-populated for all users. The Voluntary profile information contains work-related skill information and work history, as well as a photo and some other personal information, should users elect to share these items.



Mandatory Profile Fields
Mandatory profile fields are synced directly from the Active Directory (AD), used for personnel recordkeeping:

a. First Name
b. Last Name
c. Agency Email Address
d. Primary Contact Phone

In the diagram to the right, these four fields can be seen as greyed out.

These fields are not editable in the portal. We also discourage users from editing these fields in the workspace.

Voluntary Profile Fields
The remainder of the User Profile Fields is considered voluntary. However, to ensure that MyUSAID.gov becomes as robust as possible, employees are encouraged to complete the additional fields and keep it current, as it relates to their work for the agency.

Profile Fields
All fields below are editable by user unless otherwise noted. Also noted is the system where information is synced from, if applicable.

Field Name	Editable	Source	Description (if not apparent)
Email	No	Active Directory	Doubles as user ID in the system
First Name	No	Active Directory	User's first name
Last Name	No	Active Directory	User's last name
Primary Phone	No	Active Directory	User's work phone
Alternate Phone	Yes		Optional Field: user can use this for their mobile or other alternate phone number
Secondary Phone	Yes		Optional Field: user can use this for their mobile or other alternate phone number
Title	Yes		User's current title within the agency
Bureau/Office	Yes		User's bureau/office
Job Start Date	Yes		Date user started with the Agency
Employee Type	Yes		Direct-hire, FSN, Institutional Contractor, etc.
Location/Country Post	Yes		
Operational Skills	Yes		
Disaster Relief Skills	Yes		
Technical Area	Yes		
Languages Spoken	Yes		
Academic Study	Yes		
Country Experience	Yes		
Backstop	Yes		

Work History	Yes		Editable text area for posting resume or bio.
Interests	Yes		

Additional fields are available to showcase personal photos, links and files.

Profile Photo

Attaching a photo to your profile is voluntary but encouraged, as inclusion of photos gives the MyUSAID.gov a more personalized, friendly feel. If a photo of a person is used, the photo should be of the user in question only. Icons are also acceptable. USAID Contractors may not reference their contract employer in their profile picture (e.g., IBM employees should not use the IBM logomark as a profile photo).

Profile Picture Best Practices

a. The purpose of having a profile on MyUSAID.gov is to foster social collaboration, communication, and engagement to carry out the mission of USAID more efficiently. Therefore the use of a profile picture on MyUSAID.gov portal and the workspace is not mandatory, meaning MyUSAID.gov users have the freedom to decide whether or not they want their picture to be part of their profile.
b. In absence of a profile picture, the default setting will be a silhouette. Users can also use clip art and other graphic images instead of a photo.
c. All MyUSAID.gov profile photos should be consistent with Agency norms for the working environment.
d. The purpose of a profile picture is to identify the MyUSAID.gov user. Therefore the MyUSAID.gov user should be the only Subject in the picture. This aligns with USAID's policy around sharing of personal identifiable information, such as an imagine, which could potentially be used to target certain users, their families, or the agency as a whole.

Examples:

YES

NO

OK

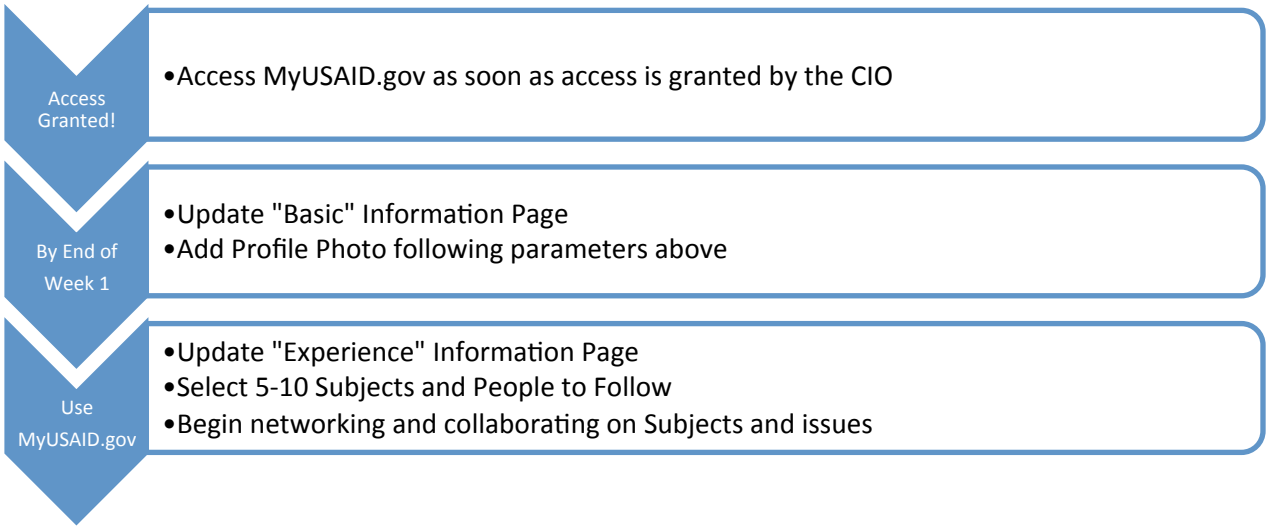
Photos / Items included on the Profile "Showcase"

Users should not post images of the following as a part of their profile showcase, which is a place to post files and links associated with one's profile.

- Outdoor pictures of Embassies
- Outdoor pictures of Missions
- Any other photos/files not that would not be appropriately displayed in your physical work environment
- Photos should not be posted that compromise the safety of our personnel and facilities around the world.

Recommended Timeline for Completion of Profile and Initial Customization

It is recommended that all users review their profile by the end of the first week using MyUSAID.gov.



User Profile Ownership
Standard Operating Procedure (SOP)

1. **Purpose.** Provide a uniform and standardized set of procedures for MyUSAID.gov users to follow in the ownership of their profiles.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov users must adhere to the information provided in this SOP regarding their User Profile management in MyUSAID.gov. The MyUSAID.gov Team is responsible for keeping the MyUSAID.gov Subject Guide up to date. Questions directed to IMI@usaid.gov should be filtered up to the Legal Regulatory and Policy Working Group if they cannot be answered by the IMI team.

5. **Guidance.** Below is the guidance on User Profile management. MyUSAID.gov users are encouraged to take full advantage of the platform by filling out their profiles so that USAID staff can easily find relevant Subject matter experts, connect with follow employees worldwide, and learn more about colleagues. User profiles help to address key goals of MyUSAID.gov by promoting internal communications, removing barriers, and engaging USAID employees to better collaborate in their work environments.

The MyUSAID.gov profile fields automatically populated for each user under the "Basic" section of a profile include: first name, last name, agency email address, and privacy contact phone. Users are encouraged to share as much relevant information as they would like.

Profile Review Process

a. On a daily basis a user should click on "My Wall" to review the posts and cross-posts in which they have been tagged.
b. On a weekly basis a user should review wall postings by clicking on the "posts" tab under the "View My Profile" section for professionalism.
c. On a monthly basis a user should click on "Edit Profile" and review their profile information for accuracy and relevance. Any relevant changes and updates should be made at that time.
d. On a quarterly basis a user should click on "Manage Email Alerts" to make sure they are receiving the appropriate alert notification for the people and Subjects that they follow.

User Profile Change Request and Review
Standard Operating Procedure (SOP)

1. **Purpose.** Provide a uniform process for request a change to the User Profile on MyUSAID.gov and conducting an annual review of the User Profile.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov interested in requesting a change to the User Profile, such as the additional of a new skill or technical area, the removal of an out-of-date Bureau/Office, or the correction to the spelling of a language or country. Note: this SOP does not apply to change requests to the mandatory profile field of a User Profile, such as a name or number changes. The mandatory profile fields are synched directly from the Active Directory and therefore the user should go through their AMS officer to request the change to the Active Directory.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov users must adhere to the information provided in this SOP regarding requesting a change to the User Profile. LPA and IC are responsible for responding in a timely manner with any follow-up questions or next steps.

5. **Guidance.** Below is the guidance on requesting a change to the User Profile.
   a. User should send a change request email to IMI@usaid.gov which includes the following information:
      i. Requested change (example: add a new skill under "Operational Skills")
      ii. Reason for the change
      iii. Stakeholders involved
   b. Within two business days of receiving the change request, LPA and IC should confirm and verify that all required components of the request are present and generally understood. The required components are noted above.
   c. LPA and IC should review the request and outline a draft decision based on the following criteria:
      i. Does the requested change align with USAID vernacular and work?
      ii. What are the impacts of this change on the User Profile?
      iii. Have the correct stakeholders been involved in the discussion?
   d. If a decision leads to the requested change being implemented, then LPA and IC will send the requested change to the Control Change Board (CCB) for review and cost analysis. The CCB will follow the change request process outlined in the Change Request SOP.
   e. If consensus cannot be reach or the idea is rejected, LPA and IC will initiate additional discussions with the requestor and applicable stakeholders.

6. **Guidance.** Below is guidance on the annual review process for the User Profile.
   a. Annually (preferably in the summer months), the LPA and IC will convene for a working session to review the current state of the User Profile. In this session, they will evaluate:
      i. Usage of existing User Profile fields (e.g., how many User Profiles fields are being used voluntarily)

ii. Depth and breadth of User Profile fields (e.g., do the fields and options reflect the scope of USAIDs work)
iii. Any change requests from users
    1. Additional User Profile fields or dropdowns
    2. Renaming User Profile fields or dropdowns
    3. Deleting User Profile fields or dropdowns

b. Out of this annual meeting, LPA and IC will socialize its proposed changes to the User Profile fields with the MyUSAID.gov Governance Committee.
c. The MyUSAID.gov Governance Committee will have 10 days to provide input to LPA and IC and identify what, if any recommendations need to be brought forward to the Management and Operations Council.
d. LPA and IC will consider the feedback, make a final determination, and work with CCB to make the changes to the User Profile.

User Roles and Privileges
Standard Operating Procedures (SOP)

1. **Purpose.** Provide User Roles on MyUSAID.gov for the portal and the workspace platforms.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov administrators are responsible for ensuring that the capabilities outlined in this document are translated to and kept current on the MyUSAID.gov platform.

5. **Guidance.** Below is guidance on who occupies the different user roles available in the MyUSAID.gov platform. Individuals within the Agency have these roles bestowed upon them by virtue of their particular responsibilities. See Annex 1 for additional details about User Roles.
   a. The Workspace: MyDOCS.usaid.gov. There are three separate roles available. As of this version, user roles for the workspace (Huddle) are fixed and unchangeable. Roles are:
      i. Admins: Admins are limited to technical staff within M/CIO.
      ii. Workspace Managers: If a user creates a workspace, that user is, by default, the manager for that workspace. Workspace Managers are able to change and manage setting for their workspace.
      iii. Users: This is the default user type for all individuals added into the workspace.
   b. The Portal: my.usaid.gov / Tibbr. There are three separate roles available. Roles are:
      i. Admins: This is the highest user level possible and is limited to some Help Desk Staff and members of M/CIO.
      ii. Content Managers: Individuals with this role are tasked with monitoring Subjects and creating new Subjects at any level, from the Root Subject down.
      iii. Users: This is the default user type for all individuals added into the portal.
   c. See the Change Request SOP for information on changing the user roles.

Annex 1 – Privileges Definitions
Portal (Tibbr) *Pulled from Tibbr online documentation.* The following privileges can be added to the user roles that USAID creates in Tibbr:

Note: for all user roles, the ability to create posts on one's own wall is implied. All users can become Subject Owners as well.

- **User Management: View/Edit Users**
  The users with this privilege can view and edit users under the Administration tab. By default, the admin role has this privilege.
- **User Creation**
  The users with this privilege can create user accounts.

- **Subject Management: View/Edit Subjects**
  The users with this privilege can manage Subjects under the Administration tab. By default, the admin role has this privilege.
- **Root Subject Creation**
  The users with this privilege can create Root Subjects. By default, the users role (that is, all users) has this permission.
- **Subject Creation**
  The users with this privilege can create Subjects under the Subjects tab. By default, the users role (that is, all users) has this permission.
- **Application Management**
  - **Manage Applications** – The users with this privilege can manage applications under the Administration tab. By default, the admin role has this privilege.
  - **Manage Instances** – The users with this privilege can manage specific instances of an application under the Administration tab. By default, the admin role has this privilege.
- **Application Creation**
  The users with this privilege can create application Apps under the Applications tab. Only Admins have the ability to create Apps within the portal.
- **Role Management: Edit Roles**
  The users with this privilege can manage roles under the "Event Streams" tab. By default, the admin role has this privilege.
- **Message Management: Banned Words**
  The users with this privilege can specify certain words and prohibit them from being posted in the tibbr input fields. By default, the admin role has this privilege.
- **Community: Manage Community**
  The users with this privilege can add communities, edit community properties, grant access to all users or only the specified ones, or delete communities. By default, the admin role has this privilege. – ***Note: Tibbr recommends not using this role.***
- **Group Creation**
  The users with this privilege can create people groups. By default, the admin role has this privilege. – ***Note: Tibbr recommends not using this role.***

The preset "Admin" role in Tibbr has the following capabilities. (***Note: These cannot be bestowed on custom user roles that are created manually.***

- **Publish Global Announcements**
  Broadcast Tibbr posts to all users at the top of the users' walls.
- **Configure Email App**
  Create an email event stream with an instance to enable that stream to fetch posts sent to an email alias and to publish them to a tibbr Subject.
- **Configure Oracle Expenses App**
  Configure the Oracle Expenses event, enabling the workflow for processing expense reports.
- **Configure Box App**
  Configure the Box app, enabling sharing of Box documents among tibbr users and facilitate collaboration.
- **Configure Ideas App**

Configure the Ideas app, enabling users to share ideas within the context of tibbr.
Note: additionally, only an Admin can create a Subject with "Broadcast" capability, although, in theory, anyone can be a Subject Owner, even of Subjects set as Broadcast Subjects.

Workspace (Huddle) *Pulled from Huddle's presentations on Admin and Workspace Manager permissions.*

- **Workspace Creation**
  All users can create workspaces if they have been provisioned into the USAID Huddle instance.
- ***Manage Workspace Settings and Permissions***
  Users can control the settings on the workspaces they create. These capabilities include changing the workspace name and permissions settings for users invited into the workspace. These permissions include:
  - Controlling whether or not a user can email a file out of the workspace
  - Controlling whether or not anyone can create a discussion in the workspace
  - Controlling whether or not users can create folders in the workspace
  - Controlling whether or not users can invite others into the workspace
  - Setting permissions for read or write access on folders
  - Setting permissions for folder invisibility for certain users or teams
  - Selection of features to display as a part of the workspace, among which are the Overview, Files, Tasks, Whiteboards, Discussions, Meetings and People.
- ***Create/Manage Teams***
  Workspace managers can create teams for the users invited into the workspace, which allows workspace managers to determine how best to organize groups in the workspace: by job role, by approval path, or by working group.
- ***Invite Users***
  Workspace managers can invite new people into their created workspaces.

Whether or not a user is a workspace owner, they can contribute to the workspaces through creation of tasks, collaboration, and file management.

- **Create Tasks**
  Workspace managers and the users within the workspace can create tasks and assign them to other members of the workspace.
- **File Management**
  Workspace managers and users can contribute files to the workspace, provided the permissions mentioned above.

- The preset "Admin" role in Huddle has the following additional capabilities.
  Note: It is thought that only one users are granted this role with each installation, however, this must be confirmed.
- **View Account Settings**
  Attached to the Admin's profile photo, the option to "View Account Settings" is available.
- ***Customization***
  The Admin(s) can use the Customization menu to change the logos on the login screen and to change the default workspace logo.

- ***Workspace Control***

  Through the workspaces menu, Admins can get a high-level view of all the workspaces with the instance. They can also perform the following:
  - Make self a workspace manager (useful if the workspace manager has left the company or has set permissions incorrectly for the workspace and needs help repairing them)
  - Edit any workspace to change title, description or logo
  - Invite manager to replace a lost manager or to support an existing one
  - Lock to keep others from making changes to the workspace
  - Finalize, which archives the workspace and prevents additional changes
  - Delete

Because of the nature of these permissions, it is understandable why it is tightly controlled.

Annex 2 – User Responsibilities

Portal

- **User**

  This the default user type for all individuals added into the Portal. Users can create new posts, public or private, make new Subjects (not at the Root Subject) and be Subject Owners (even of Subjects they don't create if another Subject Owner grants them access).
- **Content Manager**

  Individuals with this role are tasked with minding Subjects and creating new Subjects at any level, from the Root Subject down. They have the ability to do all of the things that Users can do, but also have the ability to create Root Subjects, a responsibility that can change the landscape of the Portal.
- **Admin**

  This is the highest user level possible in the Portal and is limited to some Help Desk Staff and members of M/CIO. In additional to all the things that Users and Content Managers can do, Admins have the ability to create Apps and make Global Announcements from any Subject.

Workspaces

- **User**

  All individuals can be made users of a particular workspace, either of one that they create or that they are invited into by Workspace Owners. Users in workspaces can access files and folders in the given workspace based on the set permissions: they can view, edit, and/or modify files and folders based on these permissions.
- **Workspace Owner**

  If a user created a workspace (or is made a workspace owner by another workspace owner) they have enhanced privileges. They can add new users to their workspace, change permissions, and move files and folders around, as well as contribute to files held within the workspace.
- **Administrator**

  Users at the Administrator level in the workspaces are limited to those Helpdesk Staff and a few select persons within M/CIO. With these permissions, they can manage

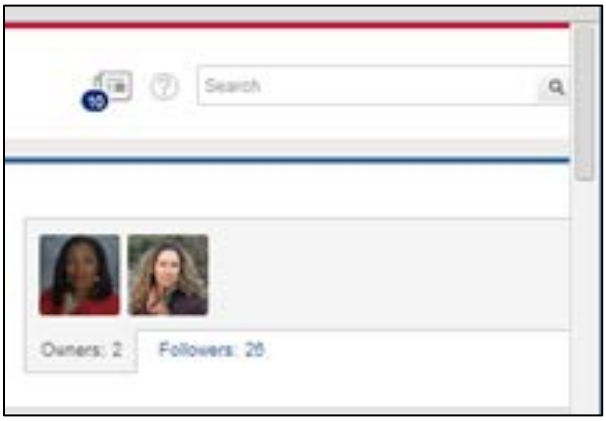
workspaces at large, lock and unlock files, and can be called in to solve other issues for which higher-level permissions might be require

Stakeholder Responsibilities and Daily Tasks

In general, users of all type should check their portal and workspaces everyday and contribute as necessary to the conversations and work that is transpiring in these spaces.

- **Power Users**
  Because Power Users may be asked to assist other members of their bureaus with day-to-day problem solving in the portal and workspaces, it is recommended that, in addition to general checking of their own items, they check in with other users once a week to once every two weeks about how they are using the portal and workspaces. It is also recommended that they respond as promptly as they can to requests for help, or, if that is not possible, that they refer users to the IMI Question and Answer Subject on the Portal.

- **Subject Owners and Content Managers**
  Any user that is noted as the owner of a Subject is considered a Subject Owner for that Subject. The role of a Subject Owner is to contribute to and maintain the content and collaboration that occurs within that Subject.

  Prior to creating a new Subject, the Subject Owner should verify that a similar Subject does not currently exist and identify the appropriate Root Subject under which the Subject should be placed. At the outset of creating a Subject, the Subject Owner will want to clearly define the purpose of the Subject using the Subject description, invite stakeholders to follow the Subject, identify any key stakeholders to co-owner the Subject, and populate the Subject page with any relevant and current content.

- The Subject Owner plays a key role in the continued maintenance and oversight of the Subject. Specific tasks include:
  - On a weekly basis, review wall postings and Sub-Subjects created under the Subject for professionalism and relevance to the purpose of the Subject; verify the accuracy of posts made to the Subject.
  - On a monthly basis, verify that the content on the Subject is current and accurate.
  - On a quarterly basis remove any outdated or inaccurate content from the Subject and verify that there is no unnecessary duplication on the platform.

Person-to-Person Communications
Standard Operating Procedures (SOP)

1. **Purpose.** Provide best practices for engaging in person-to-person communication on MyUSAID.gov.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov users have the responsibility to follow this guidance. M/CIO has the responsibility to provide guidance for use of any agency system.

5. **Guidance.** Below is guidance on when different types of person-to-person communication should be used. For information on how to use these features please see the following user guides: Portal How to Guide or Workspace How to Guide.
   a. Email: MyUSAID.gov is not meant to replace email communication; however, activity in the portal can trigger various email events. Google email can be used for:
      i. Daily communications with other staff members
      ii. Read, compose, send, and store messages
      iii. Telework accountability
      iv. Communicating with third parties/external-agency partners (contractors, other agencies, etc.)

Note: For detailed information regarding Agency email policies and etiquette, please read E-mail Acceptable Usage Policy (A Mandatory Reference for ADS Chapter 545)

   b. Private Post: Private posts within the portal areas are visible only to the users to whom these posts are directed. However, when tagging individuals, the same care and attention should be applied as is practiced with email communications. Users should double check to ensure that only intended individuals are tagged (e.g., John Doe vs. John Dee) so that messages are not misdirected.
   c. Chat: Chat functionality is available within MyUSAID.gov and serves as another option to message and collaboration with staff on the MyUSAID.gov platform. The MyUSAID.gov chat feature is archival, meaning chat records are saved for future reference, and searchable.
   d. Notifications from MyUSAID.gov; Portal: Users can customize the frequency of the email alerts they receive from MyUSAID.gov. Email alerts can be attached to posts to users OR to posts to a Subject, both of which allow users to monitor activity of people and Subjects of interest to them. These email alerts will most commonly come from actions made by other users which trigger emails, Subjects that users follow, or responses to user posts. Frequency can be set to one of the following for any individual or Subject:
      i. Real-Time (as soon as a post is made, an email is sent)
      ii. Hourly (email is sent every hour)
      iii. Daily (one email is sent per day)
      iv. None (emails are never sent)

      It is recommended that users maintain some level of MyUSAID.gov alert frequency and do not turn off alerts entirely.

e. Notifications from MyUSAID.gov; Workspace: Email notifications are sent to users from the workspaces of which they are members, related to approval requests, task assignments, and task updates or edits. Alerts can be disabled entirely but cannot be fine-tuned and customized by workspace. Therefore, it is recommended that users do not turn off notifications from the workspace (i.e., leave the default settings in place).

Root Subject Ownership
Standard Operating Procedures (SOP)

1. **Purpose.** Provide a uniform and standardized set of procedures for MyUSAID.gov users to follow when owning a Root Subject.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov who own a Root Subject.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** Root Subject Owner(s) must adhere to the information provided in this SOP.

5. **Guidance.** Below is the guidance on the Root Subject management.
   a. Root Subject Owner Selection Process:
      i. Assigned: Root Subject Owners are Subject matter experts primarily selected by Bureau or Office senior-level management based on their expertise, experience, commitment and proficiency with the platform.
      ii. Selected: Users who display a high level of knowledge and experience on a particular Subject may be selected as Root Subject Owners by Bureau of Office senior-level management. These users will reveal themselves naturally by displaying a high level of participation, engagement and collaboration within the Subject.
      iii. Qualified Volunteer (put yourself forward): Users who are active Subject participants, possess the Subject matter expertise, and are willing to commit, are welcome to reach out to the current Root Subject Owners or senior-level manager of that Subject's assigned Bureau or Office, to volunteer to be considered as a Subject Owners.
   b. Main Roles and Responsibilities: The Root Subject Owner plays a key role in the continued maintenance and oversight of the root Subject. Specific tasks include:
      i. On a daily basis, review wall postings and Sub-Subjects created under the Subject for professionalism and relevance to the purpose of the Root Subject.
      ii. As necessary, but no less than weekly, populate the Root Subject with relevant and timely content.
      iii. As necessary, but no less than weekly, verify that the content on the Root Subject is current and accurate, including the description and note last review date in Subject description.
      iv. As necessary, but no less than monthly, verify that all Subjects (1 level down) have been reviewed by the Subject Owners.
      v. As necessary, but no less than quarterly, remove any outdated or inaccurate content from the Root Subject and verify that there is no unnecessary duplication on the platform.
      vi. If a Root Subject Owner leaves, the senior leadership of the responsible Bureau or Office should proactively identify a replacement.

Note: Becoming a Root Subject Owner and performing the roles and responsibilities of the position are not part of your official job description or work plan, unless your supervisor decides to include them as part of your official duties and responsibilities. Root Subject Ownership was approved at the Operating Unit level by the Administrator. Please check with your supervisor for more detailed information.

c. New and Current Root Subject Owner Duties. Make sure the following Root Subject details are accurate, completed and relevant to the Root Subject.
    i. Make sure the name is displayed correctly.
        1. The Name is a system name for the Subject and only the owner can see it, and abbreviations to shorten the name are acceptable.
        2. The Display Name will appear at the top of the Root Subject page and in the Subject hierarchy and should be short, but specific.
    ii. Ensure the Root Subject description is accurate, relevant and updated.
        1. Make sure acronyms are spelled out correctly.
        2. To assist with Root Subject management, at the bottom identify when the content on the Root Subject was last reviewed.
    iii. Ensure the Root Subject icon has an image or visual identifier and it adheres to USAID policy including, but not limited to ADS Chapter 320 Branding and Marking, ADS Chapter 541 Information Management, ADS Chapter 545 Information Systems Security, Rules of Behavior for Users ADS 545 Mandatory Reference.

d. If you are a new Root Subject Owner, let all the Root Subject followers and Sub-Subjects Owners know who you are by posting at least two of the following items types:
    i. Introduction message or update,
    ii. Event announcements,
    iii. Links,
    iv. Pictures/video, and/or
    v. Finalized, ready-to-share documents.

e. Each Root Subject Owner should manage their own personal email alerts for the Root Subject, so real-time emails are sent whenever a post is made to the Subject. This will allow the owner(s) to better monitor the activity on the Root Subject.

f. To ensure information is accurate on the Root Subject and Sub-Subjects, review the Root Subject and Sub-Subjects wall posts (i.e., information coming from other users and populating the Subject) on a regular (or weekly) basis. Ensure every single Sub-Subject created under you Root Subject contains accurate information and is relevant in content, description, and purpose to the Root Subject. When Sub-Subject information does not align with the Root Subject, please contact the sub-Subject Owner/creator for clarification.
    i. Verify the information provided is accurate. If not, reply to the post with corrective information.
        1. In the event of a dispute, where there is no authoritative source or dispute mechanism in place, the Root Subject Owner has the affirmative responsibility to contact the relevant leadership and assist in mediation and development of an answer.

ii. Verify that the information provided is relevant. If not remove non-relevant content from the Subject by removing the Subject from the message.
iii. Verify that all posts adhere to USAID Rules of Behavior for Users Mandatory Reference for ADS Chapter 545. If it does not then follow the incident reporting procedures outlined in the Rules of Behavior.
iv. Verify that posted Subject announcements, if any exist, are still relevant. If not, remove them.

g. To continue adding new content, identify posts that are related to the Root Subject, but are not posted to the Root Subject, and cross-post them by adding the Subject as a recipient.
h. Visit the Root Subject Insight panel on a monthly basis to identify any frequent posters or visitors that would be appropriate co-owners of the Root Subject.
i. Invite relevant colleagues (e.g., those who are interested in the Root Subject matter or work on it directly) to follow the Subject using the "Invite People" function available to Root Subject Owners.

Root Subject Structure Change Request and Review
Standard Operating Procedure (SOP)

1. **Purpose.** Provide a uniform process for requesting a change to the Root Subject structure on MyUSAID.gov.

2. **Applicability.** This SOP applies to all user of MyUSAID.gov that would like to request a change to the Root Subject.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov users requesting a change to the Root Subject structure must adhere to the information provided in this SOP. The LPA and IC are responsible for responding in a timely manner with any follow-up questions or next steps.

5. **Guidance.** Below is the guidance on the Root Subject change request process.
   a. User should send a change request email to IMI@usaid.gov which includes the following information:
      i. Requested change
      ii. Reason for the change
      iii. Stakeholders involved
   b. Within two business days of receiving the change request LPA and IC should confirm and verify that all required components of the request are present and generally understood. The required components are listed above.
   c. LPA and IC should review the request and outline a draft decision based on the following criteria:
      i. Does the requested change align with USAID vernacular, structure, and understanding on this topic?
      ii. What are the impacts of this change on the structure of the site and taxonomy of all Subjects?
      iii. Have the correct stakeholders been involved in the discussion?
   d. If a decision leads to the requested change being implemented, then LPA and IC will send the requested change to wsupdates@usaid.gov and confirm that this change is being requested based on the consensus and recommendations of the Team and should specifically outline the change.
      Note: wsupdates@usaid.gov delegates should be allowed two business days to implement this change.
   e. If consensus cannot be reached or the idea is rejected, LPA and IC will initiate additional discussion with applicable stakeholders.

6. **Guidance.** Below is guidance on the annual review process.
   e. Annually (preferably in the summer months), the LPA and IC will convene for a working session to review the current state of the Root Subject hierarchy. In this session, they will evaluate:
      i. Usage of existing Root Subjects (e.g., how many have been used in the last six months and how often)

ii. Depth and breadth of Sub-Subjects (e.g., does the Root Subject foster the intended scope of Subjects created within it
iii. Any requests from users in the portal for:
    1. Additional Root Subjects
    2. Renaming to Root Subjects
    3. Deletion of Root Subjects

f. Out of this annual meeting, LPA and IC will socialize its proposed restructuring of the Root Subject and Sub-Subjects list with the MyUSAID.gov Governance Committee.
g. The MyUSAID.gov Governance Committee will have 10 days to provide input to LPA and IC and identify what, if any recommendations need to be brought forward to the Management and Operations Council.
h. LPA and IC will consider the feedback, make a final determination, and work with O&M to make the changes to the Subject Hierarchy.

Annex 1: Background on Root Subjects

In general, Subjects are the place for work conversations to occur in USAID. A basic Root Subject structure was created in the fall of 2013 through a working group process that involved many Content POCs. All Subjects on the platform appear in alphabetical order. To help facilitate the transition onto the new platform the Root Subject structure used a numbering system to place information related to MyUSAID.gov at the top of the Subject listing, arranged according to working group recommendations and USAID priorities.

Only MyUSAID.gov System Administrators have the ability to create, remove or update Root Subjects, however, all users are able to create Sub-Subjects within the Root Subject hierarchy. Users can also select Subjects they would like to follow based on topics that relate to them and their work with the agency.

Subject Ownership
Standard Operating Procedures (SOP)

1. **Purpose.** Provide a uniform and standardized set of procedures for USAID users to follow when creating and owning a Subject.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov wanting to create a Subject.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** Subject creators are responsible for following the procedures outlined in this document.

5. **Guidance.** Below is the guidance on the creation and provisioning of a Subject. Please see the Subject Owner Manual for guidance on how to conduct any of the below actions.
   a. User should review the Subject directory to verify they are not creating a duplicate Subject.
      i. Use the search functionality to see if similar Subjects have been created,
      ii. Browse the Subject hierarchy to check the places a similar Subject may have been created, and
      iii. Reach out to stakeholders to verify a similar Subject does not exist.
   b. Reach out to the appropriate stakeholders when creating a new Subject to make them aware of the plan to create the Subject.
   c. Select the appropriate place to create a new Subject.
      i. Ensuring the parent Subject is a related topic to the new Subject, and
      ii. Reach out, if necessary, to the Root Subject Owner to verify the location is appropriate.
   d. Fill in the Subject details.
      i. Include a Name and a Display Name.
         1. The Name is a system name for the Subject and only the owner can see it, and abbreviations to shorten the name are acceptable.
         2. The Display Name will appear at the top of the Subject page and in the Subject hierarchy and should be short, but specific.
      ii. Include a Subject description that adds further detail about the Subject.
         1. Note whether the Subject is an authoritative source of information like the ADS, versus a collaborative space for discussion like the USAID Café.
         2. Spell out acronyms.
         3. Include search terms, so the Subject will appear in search results.
         4. To assist with Subject management, at the bottom identify when the content on the Subject was last reviewed.
      iii. Add an image to the Subject icon to provide a visual identifier. Ensure the image adheres to USAID policy including, but not limited to ADS Chapter 320 Branding and Marking, ADS Chapter 541 Information Management, ADS Chapter 545 Information Systems Security, Rules of Behavior for Users ADS 545 Mandatory Reference.

e. Identify and designate at least one other Subject owner, since the Subject creator automatically becomes the Subject Owner, to assist with Subject management and for succession planning purposes. This can include other relevant stakeholders.
f. Each Subject Owner should manage their own personal email alerts for the Subject, so real-time emails are sent whenever a post is made to the Subject. This will allow the owner(s) to better monitor the activity on the Subject.
g. To start the initial flow of information, post at least two of the following items types:
    i. Welcome message or initial update,
    ii. Event announcements,
    iii. Links,
    iv. Pictures/video, and/or
    v. Finalized, ready-to-share documents.

6. **Guidance.** Below is the guidance on the management of a Subject.
    a. On a daily basis review all wall postings for professionalism.
        i. If information is not professional, as per the Rules of Behavior for Users Mandatory Reference for ADS Chapter 545 then follow the incident reporting procedures outlined in the Rules of Behavior.
    b. As necessary, but no less than on a weekly basis, populate the Subject with relevant and timely content.
        i. If information is not relevant remove non-relevant content from the Subject by removing the Subject from the message.
    c. As necessary but no less than on a weekly basis, verify that the content on the Subject wall is current and accurate, including the Subject description and note the last review date in the Subject description. Add new content to the Subject via cross-posting.
        i. If the information is not accurate reply to the post with corrective information. In the event of a dispute, where there is no authoritative source or dispute mechanism in place, the Subject Owner has the affirmative responsibility to contact the relevant leadership and assist in mediation and development of an answer.
        ii. To continue adding new content, identify posts that are related to the Subject, but are not posted to the Subject, and cross-post them by adding the Subject as a recipient.
    d. As necessary, but no less than on a monthly basis review all Sub-Subjects created under the Subject for relevance, professionalism and adherence to the MyUSAID.gov Subject Owner Guide. Ensure the Subject and Sub-Subjects have more than two Subject Owners.
    e. As necessary, but no less than on a monthly basis visit the Subject Insight panel to identify any frequent posters or visitors that would be appropriate co-owners of the Subject.
    f. As necessary, but no less than on a quarterly basis remove any outdated or inaccurate content from the Subject and verify that there is no unnecessary duplication on the platform.

Subject Review
Standard Operating Procedures (SOP)

1. **Purpose.** Provide a uniform and standardized set of procedures for reviewing the Subjects.

2. **Applicability.** This SOP applies to all users on MyUSAID.gov who are Subject Owners.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

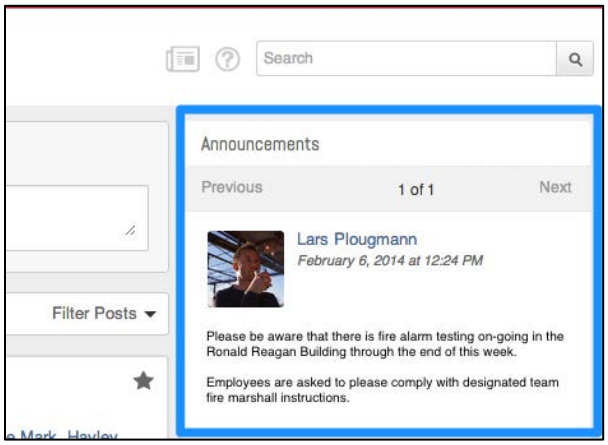
4. **Responsibilities.** Subject owner(s) must adhere to the information provided in this SOP regarding Subject Ownership. LPA and IC are responsible for keeping the MyUSAID.gov Subject Guide up to date.

5. **Guidance.** Below is the guidance on the Subject review process. Please see the Subject Owner Manual for guidance on how to conduct any of the below actions.
    a. On a daily basis review all wall postings for professionalism and relevance to the purpose of the Subject.
    b. No less than **weekly**, populate the Subject with relevant and timely content.
    c. No less than **weekly**, verify that the content on the Subject is current and accurate, including the Subject description and note last review date in Subject description.
    d. No less than **monthly**, review all Sub-Subjects created under the Subject for relevance, professionalism and adherence to the MyUSAID.gov Subject Owner Guide. Ensure the Subject and sub-Subjects have more than two Subject Owners.
    e. No less than **quarterly**, remove any outdated or inaccurate content from the Subject and verify that there is no unnecessary duplication on the platform.

6. **Guidance.** Below is guidance on the annual review process.
    a. Annually (preferably in the summer months), LPA and IC will convene for a working session to review the current state of the Subject hierarchy. In this session they will evaluate:
        i. Usage of the existing Subjects (e.g., how many have been used in the last year and how often)
        ii. Depth and breadth of Sub-Subjects (e.g., does the Subject structure foster the intended scope of Subjects being created)
    b. Out of this annual meeting, LPA and IC will socialize what, if any, proposed changes to the Subject hierarchy with the MyUSAID.gov Governance Committee.
    c. The MyUSAID.gov Governance Committee will have 10 days to identify what, if any, recommendations need to be brought forward to the Management and Operations Council.
    d. LPA and IC will consider the feedback, and make a final determination. LPA and IC will then work with the Subject Owners to make the changes to the Subject hierarchy.

Global Announcement Requests
Standard Operating Procedures (SOP)

1. **Purpose. What are Global Announcements?**
Global Announcements are the Agency's official method for amplifying significant internal communications or alerting the Agency. Global Announcements are posts on MyUSAID.gov that have been promoted to appear on the main landing page in the upper-right quadrant of the page, displayed on a manually revolving carousel.



Global Announcements in MyUSAID.gov can only be promoted by System Administrators which is limited to select M/CIO and IT Help Desk staff to minimize security risks to the system. Internal Communications makes all final determinations regarding if an announcement or information fits the criteria of a Global Announcement.

The "Announcements" box is only visible if there are relevant announcements currently active. When there are no announcements, the box disappears. There is no archive function currently available for Global Announcements.

Only ten (10) Global Announcements can run concurrently. Global Announcements can be manually removed. A user can request the length of time a Global Announcement appears in days and hours.

2. **Applicability. Requesting a Global Announcement to Amplify a Communication**
The types of communications that are appropriate for Global Announcements are messages from the Administrator, high-level Agency-wide events, important information for an Agency-wide audience, and important USAID milestones. Examples of such communications might include announcements of upcoming USAID Townhalls or Development Fora; announcements about significant launches and initiatives; information and links for the FEVS, and other high-level information that is meant for an Agency-wide audience. Communications that would not be appropriate include, but are not limited to, Bureau or Independent Office specific meetings, special events and panels, small group meetings, and other items of a more personal nature that might include birthdays, personal announcements (e.g., yard sales), or after-work functions and parties. Special Note: Unless an event, message or information to be disseminated fits the criteria above, Global Announcements is not the appropriate vehicle for information on panels and events that may be currently disseminated via hallway flyers.

3. **Questions.** Questions regarding the SOP may be directed to IMI@usaid.gov.

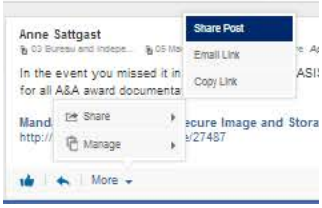
4. **Responsibilities.**
   a. Internal Communications has five (5) days upon receipt of a request for a Global Announcement to accept or reject the announcement as meeting the criteria for a

Global Announcement. If accepted, Internal Communications will post the Global Announcement for the requested duration of time, assuming the requested time is within permissive range and the announcement can be accommodated. If rejected, IC will communicate to the submitting party that the message does not meet Global Announcements criteria.

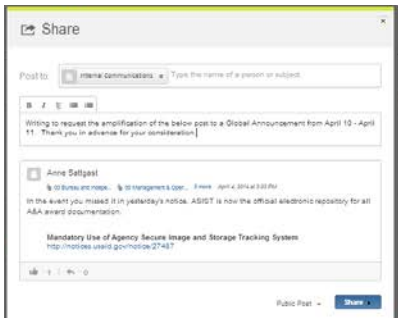
b. Internal Communications reserves the right to remove a Global Announcement before the requested duration of the Global Announcement has elapsed for reasons not limited to, if the information is no longer applicable, or if there are no more allotments available on the Global Announcements carousel. Should a Global Announcement be removed before the requested duration for posting has elapsed, Internal Communications will inform the submitting party that the posting was taken down.

c. The System Administrator Team will post a Global Announcement within the hour during the core business hours, M – F, 8:00AM – 5:00PM. If posting needs to be done after the core business hours, we request that the admins be notified of the required posting and duration for the posting by 4:30PM on that business day.

5. **Guidance.** Below is the guidance on how to request a Global Announcement posting for USAID Bureaus, Independent Offices, and Missions. If a USAID Bureau, Independent Office or Mission feels that their information/announcement/message fits within the above criteria for a Global Announcement, they should follow the protocol:



a. Post the announcement request to the B/IO/Mission Subject." (Please note that only the first few lines of the announcement will appear in the final post in the Global Announcement until a user clicks "Continued").



b. Share the post with "Global Announcement Requests", which is a Sub-Subject under Internal Communications, and in the comments section accompanying the post, identify the criteria by which the message meets Global Announcements standards and the length of time that the B/IO/Mission would like to request the announcement appear as a Global Announcement. Feel free to cross-tag the shared post with your B/IO/Mission, and other relevant stakeholders.

c. Once the request is submitted to Internal Communications, IC has at least five business days in advance of when the post should appear to review the submission as a Global Announcement.

d. Internal Communications will review and verify that the post adheres to the Global Announcement criteria. Internal Communications also reserves the right to edit a post request before promoting. If a post is edited, the post request will be returned to submitting party for clearance, but Internal Communications reserves right of final clearance of post promoted to Global Announcement.

e. If Internal Communications agrees to promote a post to a Global Announcement, they will navigate to the "More" button, select "Share," and then select "Copy Link" and email wsupdates@usaid.gov and CC Danny You with the link to the post.

f. The System Administrator Team will post a Global Announcement within the hour during the core business hours, M – F, 8:00AM – 5:00PM. If posting needs to be done

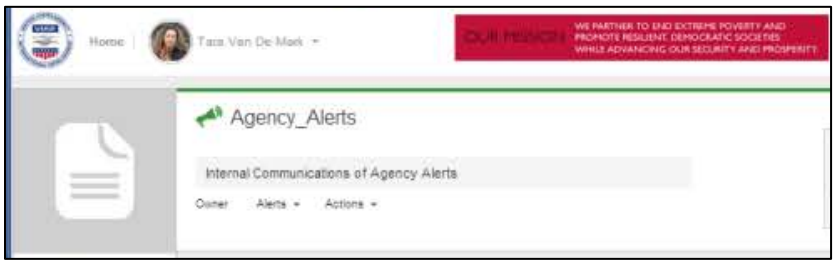
after the core business hours, we request that the admins be notified of the required posting and duration for the posting by 4:30PM that business day.

g. Internal Communications reserves the right to take down a Global Announcement before the requested time allotment has been satisfied should there be a circumstance in which the maximum number of Global Announcements has been reached on the platform, and subsequent Global Announcements need to be posted for Agency information and attention. In such cases, the submitting party will be notified by Internal Communications.
h. Should Internal Communications determine that the submitted announcement does not meet Global Announcement criteria, Internal Communications will submit a "pass" to the submitting party within five days of the submission request.

6. **Guidance.** The below is guidance on Internal Communications procedures for posting Global Announcement.
   a. On the Internal Communications Subject page, draft the post that you would like to appear as a Global Announcement. Note that only the first few lines will appear in the Global Announcement box on the top right hand side of the homepage until a user clicks "Continued".
   b. Once the post has been made, use the "Share" option, under the "More" button on the post, and select "copy link."
   c. Email the link to wsupdates@usaid.gov and CC: Danny You with the link to the post. In the message please note the dates (from/to) you would like the Global Announcement to be available.
   d. The System Administrator Team will post a Global Announcement within the hour during the core business hours, M – F, 8:00AM – 5:00PM. If posting needs to be done after the core business hours, we request that the admins be notified of the required posting and estimated duration of the posting by 4:30PM on that business day.

Broadcast Subject Requests and Review
Standard Operating Procedure (SOP)

1. **What is a Broadcast Subject?**



Broadcast Subjects are one of the Agency's official methods for promoting important internal communications of interest to a majority of the Agency. For example, Agency Alerts, seen above, are a type of Broadcast Subject under the purview of Internal Communications in the Office of the Administrator.

Broadcast Subjects appear in the MyUSAID.gov stream, similar to posts from a normal Subject. Posts are Subject to the natural flow of the MyUSAID.gov stream, meaning that if a post is made at 08:00, at 08:10 it could very well be pushed down in user streams; thus, Broadcast Subjects have short-term visibility as opposed to Global Announcements, which are held in place in the top-right of the screen for a duration of time deemed by the author of the Announcement.

Another difference that Broadcast Subjects have with Global Announcements is that Broadcast Subjects are visually different: they are outlined with green and feature a small green megaphone graphic. One of the key differences in functionality between a standard Subject and a Broadcast Subject is that all posts made to the latter are displayed on every user's wall, regardless of whether or not a user subscribes to the content most closely aligned with the Broadcast Subject. Additionally, users cannot reply to a Broadcast Subject post. Also, many of the Subject-related tasks, like adding a Sub-Subject to a Broadcast Subject post, are not available.

2. **Purpose.** Provide a uniform process for requesting the creation of a new Broadcast Subject on MyUSAID.gov and conducting a review of the Broadcast Subjects.

3. **Applicability.** This SOP applies to all users of MyUSAID.gov that would like to request a new Broadcast Subject and to LPA and IC.

4. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

5. **Responsibilities.** MyUSAID.gov users must adhere to the information provided in this SOP regarding requesting a new Broadcast Subject. LPA and IC are responsible for responding in a timely manner with any follow-up questions or next steps and for conducting reviews of the Broadcast Subjects.

6. **Guidance.** Below is the guidance on how to request the creation of a new Broadcast Subject if the user is from an Authorized Office.
   a. The user has verified that their office is authorized to send Executive Messages as per ADS Chapter 504 Agency Notices.
   b. If the Office is Authorized to send Executive Messages then the user should send a request email to IMI@usaid.gov which includes the following information:
      i. Purpose of the Broadcast Subject.
         1. What aspect of the Agency Notice will this Broadcast Subject help to amplify?
         2. Why is it important to reiterate this aspect of the Agency Notice?
      ii. Management of the Broadcast Subject
         1. Does your Office have other Broadcast Subjects? If so, what is the relationship between this new Broadcast Subject and the already existing Broadcast Subject(s)?
         2. Who will be eligible to make Broadcast Subject posts?
         3. How often will communications be distributed?
   c. Within two business days the LPA and IC should confirm and verify that all required components of the request are present and generally understood. The required components are noted above.
   d. LPA and IC should review the request and outline a draft decision based on the following criteria:
      iv. Will the Broadcast Subject enhance the mission of USAID?
      v. What are the impacts of this request on the strength of the communication stream?
   e. If a decision leads to the requested change being implemented, then LPA and IC will send the requested change to wsupdates@usaid.gov. The email should confirm that this change is being requested based on the consensus and recommendations of the Team and should specifically outline the change.
      Note: wsupdates@usaid.gov delegates should be allowed two business days to implement this change.
   f. If consensus cannot be reached or the idea is rejected, LPA and IC will initiate additional discussion with applicable stakeholders.

7. **Guidance:** Below is the guidance on how to request the creation of a new Broadcast Subject if the user is from an Unauthorized Office.
   a. The user has verified that their office is not authorized to send Executive Messages as per ADS Chapter 504 Agency Notices.
   b. If the Office is not authorized to send Executive Messages then the user should send a request email to IMI@usaid.gov which includes the following information:
      i. Purpose of the Broadcast Subject.
         1. Why does this information need to be pushed to all of USAID?
         2. What is the intended outcome of the Broadcast Subject communications?
         3. How has the Owners of the Broadcast Subject previously amplified their messages?
      ii. Management of the Broadcast Subject

1. What is the internal process for reviewing and approving Broadcast Subject posts prior to distribution?
2. Who will be eligible to make Broadcast Subject posts?
3. How long will the Broadcast Subject be in existence?
4. How often will communications be distributed?

c. Within two business days LPA and IC should confirm and verify that all required components of the request are present and generally understood. The required components are noted above.

d. LPA and IC should review the request and outline a draft decision based on the following criteria:
   i. Will the Broadcast Subject enhance the mission of USAID?
   ii. What are the impacts of this request on the strength of the communication stream?
   iii. Have the correct stakeholders been involved in the discussion?

e. If a decision leads to the requested change being implemented, then LPA and IC will send the requested change to wsupdates@usaid.gov. The email should confirm that this change is being requested based on the consensus and recommendations of the Team and should specifically outline the change.
   Note: wsupdates@usaid.gov delegates should be allowed two business days to implement this change.

f. If consensus cannot be reached or the idea is rejected, LPA and IC will initiate additional discussion with applicable stakeholders.

8. **Guidance.** Below is the guidance on how to conduct an annual review of the Broadcast Subjects.

   a. Annually (preferably in the summer months), LPA and IC will convene for a working session to review the current state of the Broadcast Subjects. In this session, they will evaluate:
      i. The purpose and relevancy of existing Broadcast Subject.
      ii. The usage of existing Broadcast Subject (e.g., how many have been used in the last six months and how often).
      iii. Any requests from users or Broadcast Subject Owners for:
         1. Creation of a new Broadcast Subject,
         2. Renaming or purposing a Broadcast Subject, and
         3. Deletion of a Broadcast Subject.

   b. Out of this annual meeting, LPA and IC will socialize its proposed changes to the Broadcast Subjects with the MyUSAID.gov Governance Committee.

   c. The MyUSAID.gov Governance Committee will have 10 days to provide input to LPA and IC and identify what, if any, recommendations need to be brought forward to the Management and Operations Council.

   d. LPA in IC will consider the feedback, make a final determination, and then work with O&M to make the changes to the Broadcast Subjects.

Broadcast Subject Ownership
Standard Operating Procedure

1. **Purpose.** Provide a uniform and standardized set of procedures for USAID users that own a Broadcast Subject.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov that own a Broadcast Subject.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** Broadcast Subject owner(s) must adhere to the information provided in this SOP.

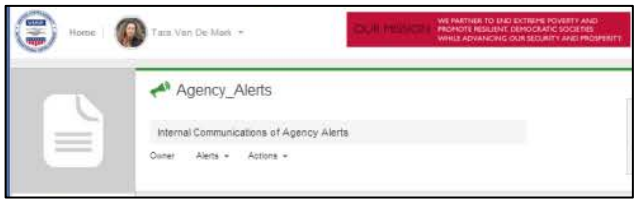
5. **Guidance.** Below is the guidance on the ownership of a Broadcast Subject.
   a. Broadcast Subject owner(s) should set-up the Broadcast Subject with the following information:
      i. Include a Name and a Display Name.
         1. The Name is a system name for the Subject and only the owner can see it, and abbreviations to shorten the name are acceptable.
         2. The Display Name will appear at the top of the Subject page and in the Subject hierarchy and should be short, but specific.
      ii. Include a Subject description that adds further detail about the Broadcast Subject.
         1. Note whether that the Broadcast Subject is an authoritative communication tool.
         2. Spell out acronyms.
         3. Include search terms, so the Subject will appear in search results.
         4. To assist with Subject management, at the bottom identify when the content on the Subject was last reviewed.
      iii. Add an image to the Subject icon to provide a visual identifier. Ensure the image adheres to USAID policy including, but not limited to ADS Chapter 320 Branding and Marking, ADS Chapter 541 Information Management, ADS Chapter 545 Information Systems Security, Rules of Behavior for Users ADS 545 Mandatory Reference.
   b. Identify and designate at least one other Broadcast Subject Owner to assist with Subject management and for succession planning purposes.
   c. Posts on Broadcast Subjects are pushed out to all MyUSAID.gov user walls and therefore the content of the post must adhere to the following guidelines:
      i. Posts should be concise and professional in tone. There is no limit to the number of characters used, but it is recommended to keep the communication succinct and simple so that information can be quickly absorbed.

ii. Posts should contain contact information if a user needs further information, as users cannot make comments or respond to a Broadcast Subject post.
iii. Intent of the posts must directly relate to the narrow purpose of the Broadcast Subject and only address important information about the Agency's work.

d. Broadcast Subject Owners should post no more than 3 posts a week, but it is highly recommended to use Broadcast Subjects sparingly and judiciously. If too many Broadcast Subjects are created too often, the messages will lose their urgency and ability to attract heightened awareness.

Requesting an Agency Alert
Standard Operating Procedures

1. **Purpose**: **What are Agency Alerts?**



Agency Alerts are one of the Agency's official methods for promoting important internal communications of interest to a majority of the Agency. Agency Alerts (as seen in the image above) are a type of Broadcast Subject under the purview of Internal Communications in the Office of the Administrator.

Agency Alerts can be requested from any MyUSAID.gov user. They are edited, approved, cleared, and posted by Internal Communications.

Like all other Broadcast Subjects, Agency Alerts appear in the USAID Stream, similar to posts from a normal Subject. Also like all other Broadcast Subjects, Agency Alerts are Subject to the natural flow of the USAID stream, meaning that if a post is made at 08:00, at 08:10 it could very well be pushed down in user streams; thus, Agency Alerts have short-term visibility.

Like all other Broadcast Subjects, Agency Alerts are visually different: they are outlined with green and feature a small green megaphone graphic. One of the key differences in functionality between a standard Subject and an Agency Alert is that all posts made to the latter are displayed on every user's wall, regardless of whether or not a user subscribes to the content most closely aligned with the Agency Alert. Additionally, users cannot reply to an Agency Alert post and many of the Subject related tasks, like adding a Sub-Subject to an Agency Alert post, are not available.

2. **Applicability**: **Using an Agency Alert to Amplify a Communication**

Agency Alerts should be created only for topics that are of Agency-wide interest. They should be used to amplify existing USAID corporate communications. Because of their short-term visibility, Agency Alerts may be used as a same day reiteration of an already existing Global Announcement, or a re-emphasis on corporate-wide messaging, such as in Agency Notices.

Examples of Agency Alerts which are suitable for Agency-wide communications include, but are not limited to, Executive Messages, Weekly Notes from the Administrator, reminders about Agency-wide events that are live-streamed, and the daily digest of Agency Notices.

Examples that are NOT suitable for posts are location-specific events, retirements, walk-a-thons, personal BBQs, etc. There will be other venues to amplify these types of communications on MyUSAID.gov. For instance, Internal Communications has a Sub-Subject entitled "Events in DC" where all Washington, D.C. based events can be posted for others' information. Those events currently posted as hallway flyers, for instance, can be posted here. Alternatively, Internal Communications will also have a Sub-Subject entitled "Events in the Field" for those who wish to amplify Mission-specific information and/or events Agency-wide.

Other items, which include The Policy Pulse, News You Can Use, LPA's Weekly Message, etc. which do have a wide audience but are not necessarily Agency-wide audiences, should use a different vehicle for disseminating their information. It is suggested that each Bureau, Independent Office, Operating Unit or Mission have a Sub-Subject of "Communications" under their respective Subject page so that interested users may follow and easily receive this information.

Because of the mass-posting capability, requests of the usage of Agency Alerts should be carefully considered. If any one Subject Owner or user posts Agency Alerts too frequently, the Agency Alert function may lose a sense of urgency and the capability of attracting wanted attention to the information being disseminated, as users would get overloaded with information deemed "important".

3. **Questions:** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities**:
   Any MyUSAID.gov user can propose an Agency Alert, but only Internal Communications can clear them for posting. Only System Administrators can post Agency Alerts.

   Agency Alerts must be curated carefully. Internal Communications reserves the right to edit the posting. Should a proposed posting be edited by Internal Communications before it is cleared, the posting will be returned to the user proposing the post to ensure approval of the edits. Internal Communications reserves the sole right to clear Agency Alert postings.

   Internal Communications also reserves right to decline to post a proposed Agency Alert, if Internal Communications does not deem the Subject matter fits the criteria of an Agency Alert.

   When submitting postings to Internal Communications, MyUSAID.gov users requesting an Agency Alert must also make clear how and why the posting meets the stated criteria of an Agency Alert (i.e., why its content is deemed significant and is topical to an Agency-wide audience.)

5. **Guidance.** Below is the guidance on requesting the use of the Agency Alert Broadcast Subject to for communication.
   a. Should a user want to use the "Agency Alert" function under the Subject Internal Communications, the user must submit a formal request to Internal Communications. The user would post the Broadcast Subject request to their Bureau/IO/Mission Subject page.
   b. Once posted to the Bureau/IO/Mission Subject, the user would "share" the post with "Agency Alert Requests", which is a Sub-Subject under Internal Communications, and in the comments section accompanying the share, identify clearly the criteria by which the posting meets the stated Agency Alert criteria (i.e., why its content is deemed significant and topical to an Agency-wide audience and is appropriate messaging from the Front Office).

c. Internal Communications (IC) reserves sole right to clear "Agency Alert" postings. Should a posting be submitted to IC, and IC deems it necessary to edit the original content before it is cleared, every effort will be made to ensure those edits are in sync with the original request before it is posted. IC reserves right to decline to post a proposed Agency Alert, if IC does not deem the Subject matter fits the criteria of an Agency Alert. Should IC deem that the posting does not meet Agency Alert criteria, the posting will be returned to the MyUSAID.gov user who made the original request with an explanation of why it does not meet the criteria.
d. Agency Alert requests should be made of Internal Communications at least five (5) days in advance of the Agency Alert posting, so that the messaging can be properly reviewed and cleared.

6. **Guidance.** Below is guidance on the best practices for requesting an Agency Alert.
   a. Agency Alerts should adhere and be applicable to important information about Agency work and the workplace ONLY.
   b. An Agency Alerts should be concise and professional in tone. There is no limit to the number of characters used, but it is recommended to keep the Agency Alert succinct and simple, so the information that can be quickly absorbed.
   c. Agency Alerts should contain contact information if a user needs further information, as users cannot make comments or respond to an Agency Alert post. While there is no set limit as to the number of posts a user can make, it is strongly recommended to use this functionality judiciously and with careful thought.

Change Requests
Standard Operating Procedures

1. **Purpose.** To outline the technical change request (CR) process for MyUSAID.gov.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov who are requesting a change to the platform.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** MyUSAID.gov user roles and responsibilities when requesting a technical change and M/CIO roles and responsibilities to make sure tickets are issued and resolved in a timely fashion.

5. **Guidance.** Below is the guidance for submitting a change request. There are three channels that capture changes requests. These channels include the CIO-Helpdesk, the technical team, and the business owner (M/MPBP).
   a. The CIO-Helpdesk recommends a CR based on tickets submitted by users to the helpdesk.
   b. The technical team recommends a CR based on technical issues encountered during development.
   c. The business owner recommends a CR based on stakeholder and customer feedback from users.

PRIORITIZATION PROCESS

Once Intranet Modernization Initiative (IMI) Project Team (IPT) identifies that there is a CR, the team determines the request's initial priority as well as other details captured in the Master Requirements List. The Action Owner assigned to drive the resolution of a requirement/enhancement request works with the appropriate IPT member or work stream to confirm this priority and determine a resolution. The prioritization of requirement/enhancement requests involves two primary steps:

a. Assignment of each requirement/enhancement request as "high, medium, or low" priority based on a particular set of criteria that reflects the objectives of the IMI project; and
b. Characterizing requirements/enhancement requests as a subset of the three aforementioned categories by a level of importance, either by deployment category or establishing a more detailed priority list of actions for the appropriate teams.

The prioritization criteria should reflect the objectives and specific requirements associated with the successful implementation of IMI. The Project Management Office (PMO) will work with USAID management to establish these objectives and requirements, which may include items such as:

a. Software changes must follow legitimate System Development Life Cycle (SDLC) processes, with no shortcuts or truncation to ensure they operate correctly when released; which increases the importance of up-front project planning.
b. Conduct of SDLC activities must stay within the planned budgets.

c. Ancillary support activities, such as training and Help Desk must remain in synch with components and functionality included in each release.

The prioritization of requirements/enhancement requests makes use of the documentation provided for each item, using criteria such as:

a. Potential impact on IMI users, including their ability to perform their responsibilities; which is critical for the Executive Sponsor and IMI Change Control Board (CCB) to factor into their decisions;
b. Availability and complexity of temporary workarounds;
c. Impact (complexity and interfaces involved, and, therefore, the relative level of impact on cost, schedule, and risk) of changing the IMI solution and training;
d. Status of other changes already approved; and,
e. Current status of IMI SDLC and planned release and deployment milestones.

Upon completion of the prioritization process, the PMO transfers the requirements/enhancement requests to the appropriate action owner for coordination of analysis and other activities required for Release Planning and, ultimately, schedule creation.

CONTROL PROCESS

USAID designates a direct hire as the "Action Owner" for each requirement/enhancement request. The Action Owner has the responsibility for: 1) developing a full understanding of their assigned requirements/enhancement requests; 2) tracking the progress of its resolution, and 3) obtaining the appropriate Executive Sponsor's approval of the work stream results and preliminary solution. The Action Owner coordinates communications about a requirement/enhancement request within USAID to obtain the necessary approvals at the checkpoints established for this process. The Action Owners become the central point of contact for any information about their requirements/enhancement requests and related plans for and status of resolving them.

RELEASE PLANNING

Prior to the start of Release Planning for any requirement/enhancement request, the Action Owner for that requirement/enhancement request obtains Project Management or IPT approval for the requirement/enhancement request's categorization, which determines the appropriate path for a resolution. That is, depending on the assigned category, a resolution may necessitate changes to procedures, policies, training, or create additional or changed requirements for the IMI software.

During this phase, the PMO determines, through a collaborative effort with other IMI project teams, the feasibility and impact of incorporating an enhanced feature into IMI. This analysis includes the associated cost, schedule, risk, and complexity estimates, which feed into the development of a formal release plan. Release Planning includes a review of each requirement/enhancement request to:

a. Identify the impact on any program, policy, or related areas, which includes appropriate direction and assignment of responsibility for follow-up; and
b. Provide a preliminary recommendation, if any, about whether to resolve it through a procedural modification, policy change, or feature enhancement to IMI.

The groups involved in this phase identify and perform documentation updates necessary to support the final decision about each feature enhancement, along with the initiation of system

development activities, as appropriate. This documentation includes the development of a formal plan for release of the updated software for the IMI project. The IMI PMO conducts a quality review of all documents prior to submission for final review and determination on whether to proceed with a modification to IMI.

Sub-Phase/Process

Each requirement potentially involving a feature enhancement flows through the following sub-phases of Release Planning: 1) Analyze Requirements and Develop High-Level Requirements, 2) Obtain Rough Order of Magnitude, Schedule, Risk, and Complexity Estimates and Non-Functional Milestones, 3) Define Release Plan, 4) Review Documents, and 5) IPT Signoff, 6) Executive Sponsor Decision (if necessary) and 7) Change Control Board Decision. This approach provides a type of structured process necessary to ensure appropriate assessment and understanding of the proposed feature enhancement. This approach results in a more effective release plan, including providing greater certainty of the schedule for release of the change.

a. Analyze Requirements and Develop High-Level Requirements: The PMO incorporates all approved requirements/enhancement requests and incorporates them into the Requirements Traceability Matrix (RTM). Within the RTM, all requirements/ enhancement requests are re-prioritized against those high-level business requirements within the document that have not been assigned a release. Those requirements/ enhancement requests that have not been converted to a high-level requirement could potentially be included in the next release plan (based on their prioritization) and convert into high-level requirements after further analysis.
    i. Input: This process uses those approved requirements/enhancement requests and feed them into the RTM for further prioritization against the current "parking lot" of enhanced requests/requirements. These requests/requirements are contained within a document where requests/requirements have neither been converted to a high-level business requirement nor assigned to a release.
    ii. Output: The PMO, based on the re-prioritization effort of the RTM identifies those items which require further definition and converts those items into high-level requirements. Those items converted into high-level requirements are reviewed by the appropriate IPT for completeness and accuracy. The appropriate IPT then provides signoff of the high-level requirements signifying their approval.
    iii. Participation: The groups involved in this phase of the process include representatives from USAID, Project Management Office, and the Systems Integrator. The Action Owners for individual requirements/enhancement requests participate as necessary to support the effort of the work streams.

b. Obtain ROM, Schedule, Risk, and Complexity Estimates and Non-Functional Milestones: The PMO coordinates the activities associated with this phase, which involves a high-level analysis of the impacts of the proposed feature enhancements to the IMI project. The Non-Functional Work Stream(s), as outlined below, have direct responsibilities for this phase. The Work Streams involve the Action Owners as necessary to ensure a complete and accurate assessment of each requirement/enhancement request.

i. Non-Functional Work Stream(s) – Analyze the impacts of the current components of IMI, against the high-level requirements that are defined in the previous sub-phase. This analysis determines the technical feasibility of incorporating the feature enhancement. Identifies and inventories at a high-level the changes required by the feature enhancement. Develops high-level ROM, schedule, risk, and complexity estimates schedule associated with planned enhancements. Provides any non-functional milestones that are to be taken into consideration when planning the release package.
ii. Input: This process uses the high-level requirements defined in the previous sub-phase to determine the high-level estimates required for this phase.
iii. Output: The Non-Functional Work Stream(s) document the results of their analysis and provide the PMO with the requested information.
iv. Participation: The groups involved in this phase of the process include representatives from USAID, Project Management Office, Systems Integrator, and software vendors, and PMO. The Action Owners for individual requirements/enhancement requests participate as necessary to support the effort of the work streams.

c. Define Release Plan: The PMO, along with Agency representatives from the IPTs, use the output of the previous sub-phase to develop a general plan and timing for release of each feature enhancement, which may be refined by the Executive Sponsor and/or IMI CCB. This approach identifies whether to include a feature enhancement in a planned release already scheduled, or if the need for a new release exists, along with a proposed schedule. The PMO recommendation factors in critical drivers such as the level of effort required, scope and complexity of system changes, cost, and plans for other releases. The PMO's documentation includes an explanation of the basis for their recommendation. As necessary, the PMO may request additional information or documentation from the Functional and Requirements, Technical, and Implementation Work Streams. If the PMO determines that an alternative approach to implementing the enhanced feature may be more appropriate, it coordinates with the work streams to conduct additional analysis necessary to make a recommendation of the most appropriate option.
    i. Input: The documented analysis from the outputs of the previous sub-phases provides the input for this phase. The PMO may obtain additional information and documentation as necessary to fully inform their design release planning efforts.
    ii. Output: The PMO documents a general plan (called the Release Plan (RP) regarding their release details, covering a specific feature enhancement(s) included, timeline, and milestone. In addition the PMO creates a CR for the proposed release package.
    iii. Participation: The groups involved in this phase consist of representatives from USAID, PMO, and the Detailed Requirements/Design Team. The PMO may bring in other functional or technical experts as necessary to assist in completing their planning effort.

d. Review Documents: The IMI PMO has responsibility for reviewing the documentation produced through the first three sub-phases of Release Planning. The PMO reviews this documentation for accuracy and comprehensiveness, with the objective of ensuring that the information provided is consistent with and supports the proposed release plan for the feature enhancement. Introducing this review facilitates more efficient and timely accomplishment of the subsequent activities required to finalize and implement each feature enhancement. The PMO documents the results of their review, including adding the signatures or reviewers and dates conducted. If the PMO finds any component of the documentation lacking, it coordinates with Functional Leads and Detailed Requirements/Design Team to bring the documentation up to expectations.
    i. Input: The Release Plan, High-Level Estimates, and High-Level Requirements represent the essential inputs for this sub-phase. The PMO may also retain a copy of other artifacts, such as inventory of required document changes.
    ii. Output: The inputs and outputs for this sub-phase are identical, with the exception of a sign-off sheet added by the IMI PMO to indicate the completion of its review and approval of the documentation.
    iii. Participation: The IMI PMO with assistance from the Functional Leads and Detailed Requirements/Design Team is responsible for this review. They may, as necessary, consult with technical or business process experts or Action Owners as necessary to complete their review.
    iv. IPT Signoff: This sub-phase with Release Planning involves having the IPT review and signoff on the proposed Release Plan. The IMI CCB also reviews this plan and may require an Executive Sponsor approval. This sub-phase ensures that the IPTs approve of what is being proposed for future releases.
e. Change Control Board Decision (Release Plan): The IMI CCB reviews the release plan and associated CRs and conducts an impact analysis for the feature enhancements proposed within the plan. The IMI CCB conducts an impact analysis, including cost, schedule, and risk making their decision. The IMI CCB makes the final determination on the contents of the release plan. If this decision, however, deviates from the Executive Sponsor decision, the PMO shall facilitate a discussion with the IMI CCB members and Executive Sponsor to determine a final solution.

Requirement Closeout

For any requirement/enhancement request returned to the PMO for which no other solution options appear valid, the team closes out the requirement/enhancement request. The closeout process involves the following activities.

a. PMO documents a summary of the basis for closing out a requirement/enhancement request. This document summarizes the: 1) recommended solution resulting from the Release Management Process; 2) Executive Sponsor and/or IMI CCB's basis for not approving the solution; and 3) results of the reconsideration that determined the lack of a viable alternative. The PMO maintains a file of closed out requirements/enhancement requests, including the team's summary and other documentation produced by the Release Management Process.

b. The PMO updates the JAMA application to reflect the closeout of this requirement/enhancement request.
c. The Action Owner notifies the Project Manager, IPTs, and the originator of the requirement/enhancement request about its closeout.
d. The team performs no further work on any closed out requirements/enhancement requests subsequent to completing the appropriate documentation and update of the RTM.

Right Hand Side Changes
Standard Operating Procedure (SOP)

1. **Purpose.** The purpose of this SOP is to provide a uniform process for requesting a change to the Right Hand Side links on MyUSAID.gov. Right Hand Side links direct users to corporate content. Corporate content is defined as information and tools used by employees outside of the B/IO that owns the content

2. **Applicability.** This SOP applies to all users of MyUSAID.gov that are content points of contacts (POC), LPA and IC, and MyUSAID.gov users requesting a change in the title of the link, URL link or hierarchy of Right Hand Side links.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** The corporate Content Owners are responsible for ensuring the relevancy of the information contained within the pages. Updates to the content can be made as needed without impacting the Right Hand Side links. Changes impacting the title, hierarchy of the Subjects or the url used to establish the link must be made using the procedures outlined in this SOP. LPA and IC is responsible for coordinating with Content Owners on changes of this nature.

5. **Guidance.** Below is the guidance on how to request a change to the right hand side.
   a. Content Owners should send a change request to IMI@usaid.gov which includes the following information:
      i. Requested change,
      ii. Reason for the change, and
      iii. Stakeholders involved.
   b. Within two business days LPA and IC should review the request and make a decision based on the following criteria:
      i. Does the requestor's office/bureau own the content?
      ii. Has the change been approved by the bureau/office management?
      iii. Does the requested change align with USAID vernacular, structure, and understanding of this topic?
      iv. What are the impacts of this change on the structure of the Right Hand Side Subjects?
      v. Have the correct stakeholders been involved in the discussion?
   c. If a decision leads to implementation of the requested change, LPA and IC will:
      i. Send the requested change to wsupdates@usaid.gov. The email should confirm that this change is being requested based on the consensus and recommendations of the Team and should specifically outline the change. *Note: wsupdates@usaid.gov delegates should be allowed two business days to implement this change.*
      ii. Socialize the changes via the LPA Broadcast Subject

   d. If consensus cannot be reached or the idea is rejected, LPA and IC will initiate additional discussion with the Content Owners and applicable stakeholders.

e. USAID users who would like to request a change in the content of Right Hand Side Subjects should contact the Content Owners. Requests regarding the titles or structure of Right Hand Side Subjects should be directed to imi@usaid.gov. Upon receipt of these requests, LPA and IC will coordinate with Content Owners to reach a decision.

6. **Guidance.** Below is guidance on the annual review process for the right hand side.
   a. Annually, LPA and IC will review the current state of the Right Hand Side Subject hierarchy and content. The review will evaluate:
      i. Usage of existing Right Hand Side Subjects links (e.g., which Subjects are the used the most and how often),
      ii. Accuracy and currency of information on the source pages, and
      iii. Requests from users for (1) additional Right Hand Side Subjects; (2) renaming Subjects; or (3) deletion of Subjects.
   b. Out of this annual meeting, LPA and IC will socialize its proposed changes to the Right Hand Side Section Subject hierarchy list with the MyUSAID.gov Governance Committee.
   c. The MyUSAID.gov Governance Committee will have 10 days to provide input to LPA and IC and identify what, if any, recommendations need to be brought forward to the Management and Operations Council.
   d. LPA and IC will consider the feedback, make a final determination, and work with the Control Change Board to make the changes to the Right Hand Side Section Subject Hierarchy.

Approval and Clearances
Standard Operating Procedure (SOP)

1. **Purpose.** Establish acceptable use of MyUSAID.gov workspaces (Huddle) for clearing documents.

2. **Applicability.** This SOP applies to all users of MyUSAID.gov using the workspace for approvals and clearances.

3. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

4. **Responsibilities.** Every USAID employee who deals with documents meant for either a) Agency consumption or business use, or b) sharing with the public must clear these documents with responsible parties and authorities before sharing can occur. By using the capabilities of the MyUSAID.gov workspace, employees can maintain audit trails and accountability on these documents.

5. **Guidance.** Below is the guidance on utilizing the workspace for approvals and clearances.
   a. When documents are finalized via various interactions with internal teams, they can be submitted for approval to responsible parties.
   b. **Users Requesting Approval:** The following steps should be taken by the user requesting approval:
      i. *If necessary,* the document should be moved to a location where all parties can access it (e.g., moving from a draft-based workspace or folder to a finalization workspace or folder). This might be a shared workspace or a folder with appropriate access rights.
      ii. Document should then be locked, which will prevent users from making edits to the file and thereby removing the approval request from the version that needs it.
      iii. User requesting approval should then click the "Request Approval" button on the document's page, and then input the requested individuals or group of individuals. This will trigger an email notification to all approvers with a direct link to the document.
   c. **Users Approving Documents:** Upon receiving a request for document approval, user approving documents would take the following steps:
      i. Approver will receive an email requesting approval on the document. They will click the link to navigate to the document.
      ii. Approver will review the document in one of the following ways:
         1. In the preview pane
         2. By downloading the document
      iii. If the document meets expectations, Approver will click the "Approve" button below the preview window (which will trigger a notification to the requester).
      iv. If the document cannot be approved, the Approver should post a comment to the document's page, using the following details:
         1. Use an "@" symbol to tag the requester

2. Type detailed notes about why the document cannot be approved OR
3. Type out a request to discuss the document further

Records Management Manual Migration of Network Drive
Standard Operating Procedure (SOP)

1. **Introduction.**

Prior to deleting content from and/or decommissioning a network drive, the content owner(s), in collaboration with the Records Liaison Officer (RLO), must ensure that all official records are identified, located for proper retention, disposition and protection. The Federal Records Act at 44 U.S.C 3301 requires agencies to maintain records that preserve evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the agency. If record content exists on the network drives and it has not served its retention period, then it must be maintained (and managed) according to its approved disposition authority outlined in the USAID Disposition Schedule, thus, cannot be deleted. (For more guidance, please see these short videos on record versus non-record content.)

IMPORTANT NOTE: If there is a copy of a document on the network, but a corresponding official record cannot be located, then the copy may serve as the official record, and thus, must be managed in accordance with its applicable disposition.

Penalties for Unauthorized Destruction/Disposal

36 CFR subpart G- Damage to, Alienation, and Unauthorized Destruction of Records states that records may not be removed from the legal custody of Federal agencies or destroyed without regard to the provisions of agency records schedules and *the maximum penalty for the willful and unlawful destruction, damage, or alienation of Federal records is a $2,000 fine, 3 years in prison, or both (18 U.S.C. 2071).*

2. **Purpose.** Provide procedures for MyUSAID.gov users to follow when manually migrating content.

3. **Applicability.** This SOP applies to all users of MyUSAID.gov manually migrating content.

4. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

5. **Responsibilities.** MyUSAID.gov users must adhere to the information provided in this SOP regarding the manual migration of content. Records Liaison Officers must ensure that all official records are identified and located for proper retention, disposition and protection.

6. **Guidance.** Below is the records management guidance on the manual migration of network drive content.
   a. Before documents are deleted from a network drive and that drive is decommissioned, content owner(s) should work with their Records Liaison Officer* to review, identify, and inventory all official record content.
   b. Once the official records on the network drive have been identified, select the applicable disposition for each record category.
   c. If there are still questions or concerns about whether information stored on a network drive is an official record, the record owner should contact their RLO for assistance, and

the record(s) in question should be considered permanent until the approved disposition is cited.

d. If an official record has not served its retention or is still an active file, it **must** be secured either by: (1) transfer to a MyUSAID.gov workspace or (2) "print to paper."
e. Once the record has been successfully uploaded and validated for quality assurance to a MyUSAID.gov workspace, then the duplicate copy on the network drive must be deleted.
f. Temporary records which have served their retention (as listed in the applicable disposition instructions) should be deleted.
g. Permanent records which have met their in-office retention should be prepared for retirement to a storage facility. The content should be transferred to a CD, however please email recordsinquiry@usaid.gov for additional instructions before beginning the transfer.
h. Personal papers, reference documents, duplicates and other non-record content should be deleted if no longer needed.
i. After taking the previous steps, the content owner(s) must validate that the records retention procedures described herein have been adhered to and are completed.
j. Email the signed validation memo to M/CIO along with a request to decommission your network drive to wssupport@usaid.gov with a cc to IMI@usaid.gov.

** The Records Liaison Officer is the records management point of contact (POC) or subject matter expert (SME) at the Bureaus, Independent Offices and Missions. Each Bureau, Independent Office, and Mission also has an assigned Records Management Client Analyst (RMCA) from M/MS/IRD. The RMCA is the primary SME in records management for those areas to which they are assigned.*

Records Management Site Decommissioning
Standard Operating Procedure (SOP)

1. **Introduction**

Prior to decommissioning and/or deleting a website (public or internal use), the site owner/web content administrator, in collaboration with the Records Liaison Officer (RLO), must ensure that all official records are identified, located for proper retention, disposition and protection. The Federal Records Act at 44 U.S.C 3301 – requires agencies to maintain records that preserve evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the agency. If record content exists on the current website - and it has not served its retention period - it must be maintained (and managed) according to its approved disposition authority outlined in the USAID Disposition Schedule, thus, cannot be deleted. (For more guidance, please see these short videos on record versus non-record content.)

A great majority of information contained on websites may not be official record content, but rather a copy of an official record. Excerpts from or duplicative copies of items (e.g., publications, annual reports, directories, fact sheets, leaflets, newsletters, press releases and technical reports) may be posted to websites; however, the official copy of these documents are maintained (or managed) outside of the website itself. Copies may be deleted when it is determined that they are no longer needed. Note: Generally, official permanent records should not be part of the intranet unless it is a survey or some means of data collection.

IMPORTANT NOTE: If there is a copy of a document on the current website, but a corresponding official record cannot be located, then the copy may serve as the official record, and thus, must be managed in accordance with its applicable disposition.

Penalties for Unauthorized Destruction/Disposal

36 CFR subpart G- Damage to, Alienation, and Unauthorized Destruction of Records states that records may not be removed from the legal custody of Federal agencies or destroyed without regard to the provisions of agency records schedules and t*he maximum penalty for the willful and unlawful destruction, damage, or alienation of Federal records is a $2,000 fine, 3 years in prison, or both (18 U.S.C. 2071).*

2. **Purpose.** Provide procedures for MyUSAID.gov users to follow when migrating content from a legacy site into MyUSAID.gov.

3. **Applicability.** This SOP applies to all users of MyUSAID.gov that are migrating content from a legacy site into MyUSAID.gov.

4. **Questions.** Questions regarding this SOP may be directed to IMI@usaid.gov.

5. **Responsibilities.** MyUSAID.gov users must adhere to the information provided in this SOP regarding migration. Records Liaison Officers must ensure that all official records are identified and located for proper retention, disposition and protection.

6. **Guidance.** Below is the records management guidance on the content migration of sites.

a. Before a website is archived, Bureaus, Independent Offices, and Missions should work with their Records Liaison Officer* to review, identify, and catalog official record content.
b. Review the website content catalog and determine/verify if information is duplicative (i.e., copies).
c. If there are any questions or concerns about whether information that appears on a website is an official record, the record owner should contact their RLO for assistance, and the record(s) in question should be considered permanent until the approved disposition is cited.
d. If an official record has not served its retention, it **must** be secured either by: (1) transfer to the new MyUSAID.gov page or (2) "print to paper."
e. After taking the previous steps, Bureaus, Independent Offices, and Missions **must** receive email confirmation from their RLO that the records retention procedures have been followed and are complete.
f. After the RLO has signed the validation memo, it should be sent to the head of your Bureau, Independent Office, or Mission to certify that the records retention procedures described herein have been adhered to and completed.
g. Email the signed validation memo to M/CIO along with a request to decommission your intranet site to wssupport@usaid.gov with a cc to IMI@usaid.gov.

** The Records Liaison Officer is the records management point of contact (POC) or subject matter expert (SME) at the Bureaus, Independent Offices and Missions. Each Bureau, Independent Office, and Mission also has an assigned Records Management Client Analyst (RMCA) from M/MS/IRD. The RMCA is the primary SME in records management for those areas to which they are assigned.*

Glossary of Terms

1. **Portal:** The portal refers to the social collaboration aspect of MyUSAID.gov which is based on a platform called tibbr. A user can reach the portal from my.usaid.gov.
2. **Workspace:** The workspace refers to the document management aspect of MyUSAID.gov which is based on a platform called huddle. A user can reach the workspace from mydocs.usaid.gov.
3. **Administrators:**
4. **Content Managers:**
5. **Users:**
6. **Whiteboards:**
7. **Workspace Managers:**
8. **Power Users:**

MyUSAID.gov Subject Owner Guide

Creating and managing Subjects in the

Subject Owner crib sheet

Best practices for creating a Subject

1. Check for existing Subjects via the search functionality. You may not be the first person to conceive of a particular Subject, so a suitable Subject may already exist. Only proceed with creating a Subject if you are sure a Subject does not already exist for the purpose you have in mind. (Page 57)

2. Reach out to the appropriate stakeholders when creating a new Subject. (Page 7)

3. Choose an appropriate place to create a new Subject. Ensure that the parent Subject is a related topic to the new Subject. You can create Subjects anywhere in the Subject hierarchy but the top level. (Page 58)

4. Make sure you name your Subject appropriately. A Subject name should be short and specific. (Page 59)

5. Use the Subject description to add further detail about the Subject, such as spelling out non-obvious acronyms in the Subject name. (Page 59)

6. Use an image as the Subject icon to give your Subject a visual identity. Make sure the image is not Subject to third party copyright. (Page 60)

7. Nominate at least one other Subject Owner. (Page 62)

8. Post two or more updates to the Subject and consider making one of the posts a Subject announcement before you invite followers. (Page 62)

9. Consider cross-posting relevant historic threads to your Subject for additional content. (Page 63)

Best practices for managing a Subject

1. If a Subject you own has other relevant stakeholders, consider co-managing the Subject with them so that they can assist with the Subject management.

2. If a Subject you own is relevant to a colleague, be sure to invite them to follow the Subject. (Page 64)

3. If you see posts that are related to the Subject, but are not posted to the Subject, cross-post them to the Subject by adding it as a recipient, or @mention it in a reply. (Page 65)

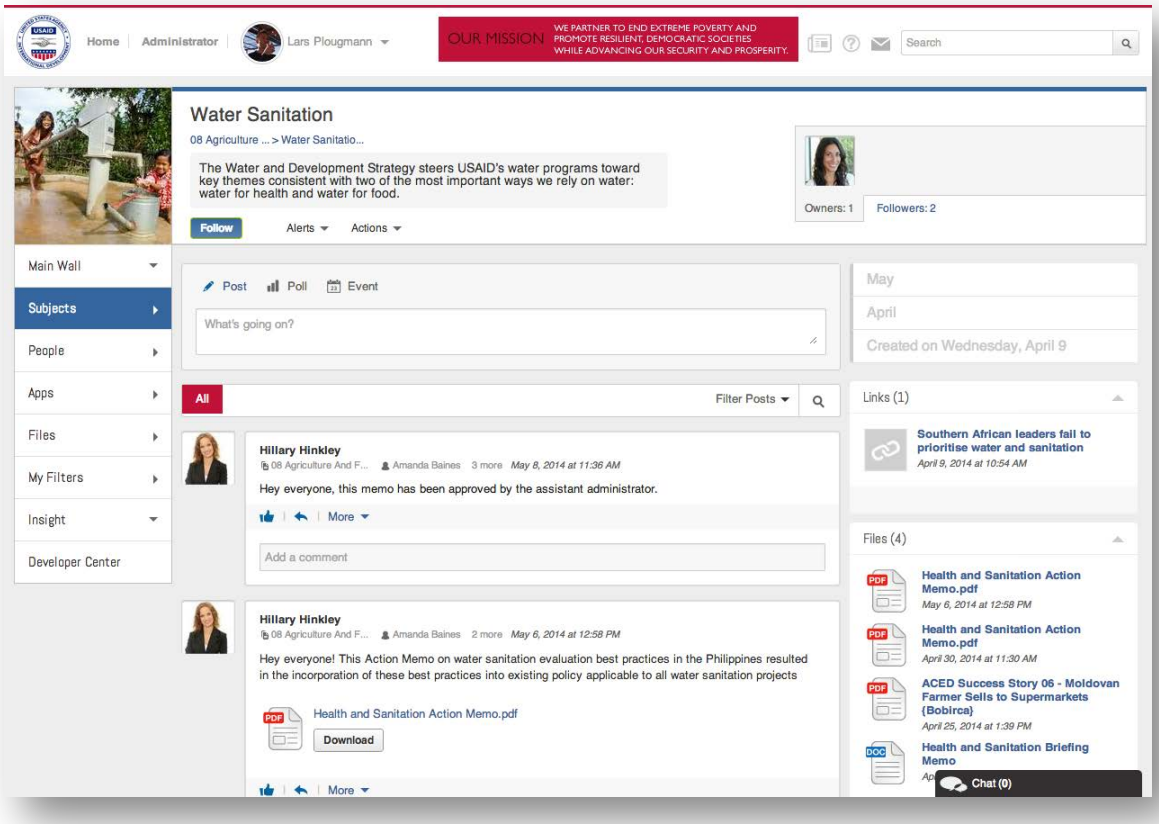
4. If someone posts non-relevant content to a Subject you own, you can remove the Subject from the message. (Page 65)

5. Visit the Subject regularly and check if Subject announcements, if any, are still relevant. If not, remove them. (Page 66)

6. Visit the Subject Insight panel at times. Maybe some of the most frequent posters or visitors would work great as co-owners of the Subject. (Page 67)

Introduction

MyUSAID.gov is the Agency's cloud-based intranet, designed to enable USAID staff to better connect, collaborate, and locate information and resources anytime, anywhere.
Part of the platform is powered by the enterprise social network, *tibbr*. On tibbr, much of the exchange of information happens in *Subjects.* Subjects are defined areas within tibbr where collaboration on a particular topic can occur.



A Subject page on the topic of water sanitation in MyUSAID.gov.gov

This guide explains the role of Subject Owner in detail. It covers the system features available to Subject Owners and discusses best practices for creating and managing Subjects.
Note that the guide uses the web interface throughout. While tibbr offers access to MyUSAID.gov via the powerful mobile app, many of the features relevant to Subject Owners are only available through the browser.

Subject user roles

There are three roles associated with Subjects:

- Subject *visitors* are people who are not following the Subject but visit the Subject page to read posts on the Subject wall or post updates to the Subject. The role of Subject visitor only applies to public Subjects.

- Subject *followers* are people who have chosen to follow a Subject or have been added as a Subject follower. In addition to the Subject visitor role, Subject followers will see new posts and replies from the Subject they follow appear on their wall.
- Subject Owners can modify Subject settings and manage who follows the Subject. In addition to this extra functionality there are also responsibilities associated with governance that befall Subject Owners.

Subject privacy

A Subject can be open for anybody in USAID who is interested in the Subject matter, or kept completely confidential on an invitation only basis. The three Subject privacy settings are:

- *Public:* The Subject appears in the Subject hierarchy. Anybody can access the content in the Subject, reply to posts or create new posts in the Subject. A Subject Owner can invite people to follow the Subject but it is also possible to follow the Subject without an invitation.
- *By Approval:* The Subject appears in the Subject hierarchy preceded by a small house-with-checkmark icon. Anybody can see that the Subject exists, but only followers can access the content in the Subject, reply to posts or create new posts in the Subject. A Subject Owner can invite people to follow the Subject. People can also request to follow the Subject; they will become followers when a Subject Owner approves their request.
- *Private:* The Subject is hidden from the Subject hierarchy, except to those who follow it – they can see the Subject name preceded by an orange lock icon. Only followers can access the Subject page, see the content in the Subject, reply to posts or create new posts in the Subject. A Subject Owner can invite people to follow the Subject. If someone unfollows the Subject, or they are removed from the Subject by a Subject Owner, they are excluded from the Subject.

When using search, content in public Subjects is searched regardless of whether the person who searched for something follows those Subjects. For private and by approval Subjects, content is only included in search results if the person using search is following those Subjects.

If you want to know more…

For a detailed explanation of tibbr Subjects than this guide provides, refer to the chapter on Subjects in the tibbr How-To guide, available at https://docs.tibco.com/products/tibbr

Creating a Subject

This section describes how to create a Subject and some of the relevant considerations when creating a Subject.

So you have a great idea for a new Subject…

Reduce duplication

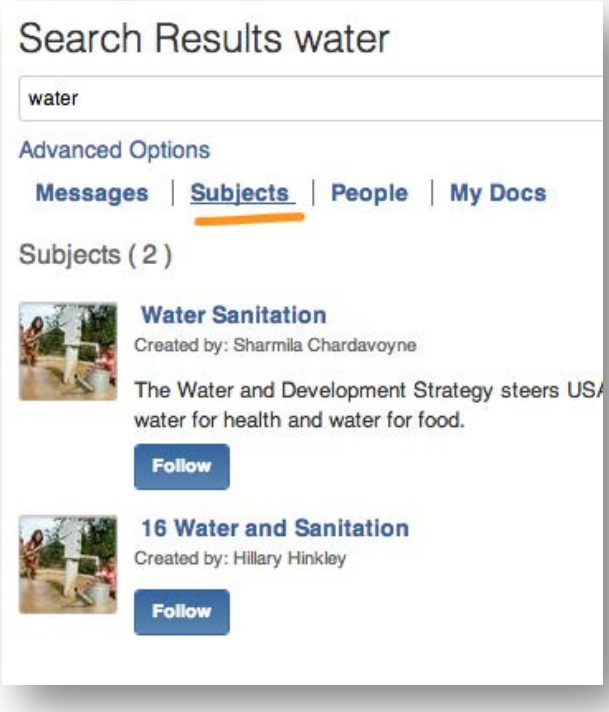
Before creating a Subject, check if a similar Subject already exists.

One of the purposes of MyUSAID.gov is to reduce duplication and share insights globally. This is best achieved if we concentrate effort in one place for each topic.

You may not be the first person to conceive of a particular Subject. A suitable Subject may already exist.

Follow one or more of these steps when checking if a similar Subject exists:

1. Use search. Check the Subject results. Repeat the search using alternative phrases. (See screenshot below).
2. Browse the Subject hierarchy to check the places a similar Subject may have been created.
3. Reach out to people who would be the natural owners of a Subject on a certain topic and ask if one exists. (This step is also useful for the next step about stakeholders.)



Only proceed with creating a Subject if you are sure a Subject does not already exist for the purpose you have in mind.

If a Subject *does* already exist, start following it and contributing to it.

Reach out to stakeholders

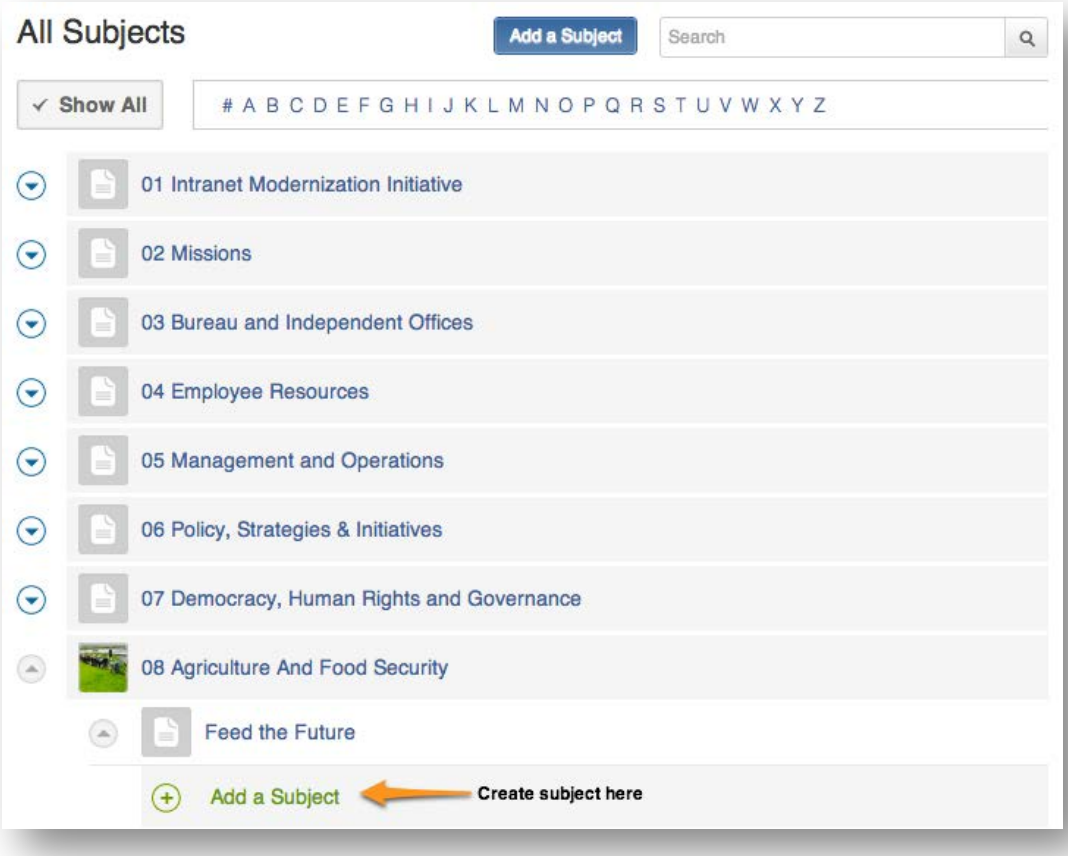
Having determined that a Subject does not exist for the topic you have in mind it is prudent to check in with the relevant stakeholders.
Reach out to colleagues you expect have a keen interest in the topic and make them aware of your plans to create the Subject.
There may be reasons that a Subject on the topic does not exist, and in that case one of the stakeholders can share the rationale with you. Or the Subject *does* exist but it is private; reaching out to stakeholders then becomes a way to obtain an invitation to the Subject.

Choose the best place to branch off

When you are ready to create the Subject, follow these steps in your browser:

1. Click on *Subjects* in the left hand menu. This takes you to the Subject hierarchy.
2. Click the encircled down arrows to expand branches of the Subject hierarchy. Keep expanding branches until you are at a place where you want your Subject to be.
3. Click the green *Add a Subject* link.

You can create Subjects anywhere in the Subject hierarchy but the top level.



This opens the *Create a New Subject* dialogue.

Fill in the Subject details

Follow these steps to fill in the details in the *Create a New Subject dialogue.*

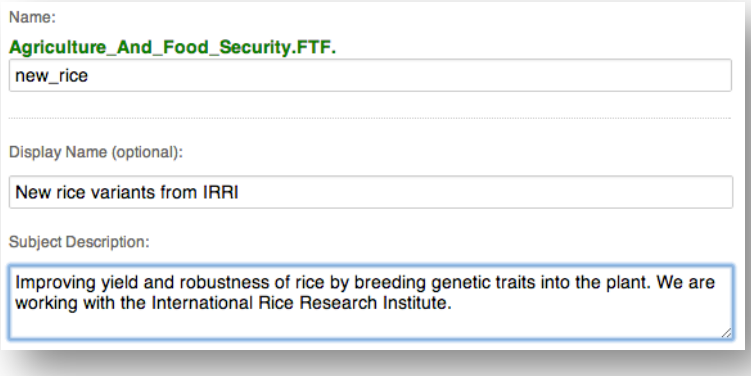
1. In the *Name* box, start typing a short name for the Subject. This is the system name for the Subject, and only Subject Owners will be able to see it.

   The text in green above the *Name* field shows the system names of the parent and grandparent Subjects.

   As you type, tibbr will show you a list with Subjects with similar names. This is the last check to avoid duplicate Subjects, so skim the list and abort the Subject creation if a relevant Subject appears.

   When you move on from the *Name* field tibbr will reformat it slightly to comply with naming conventions. (Spaces will be translated to underscores, for example.) You can go back and re-edit the system name but you don't need to.

2. In the *Display Name* field write a short and specific name for your Subject. This is the name that will be shown in the Subject hierarchy, on the Subject page and when a post is cross-posted to your Subject.
3. Use the Subject description to add further detail about the Subject, such as spelling out any non-obvious acronyms in the Subject name.

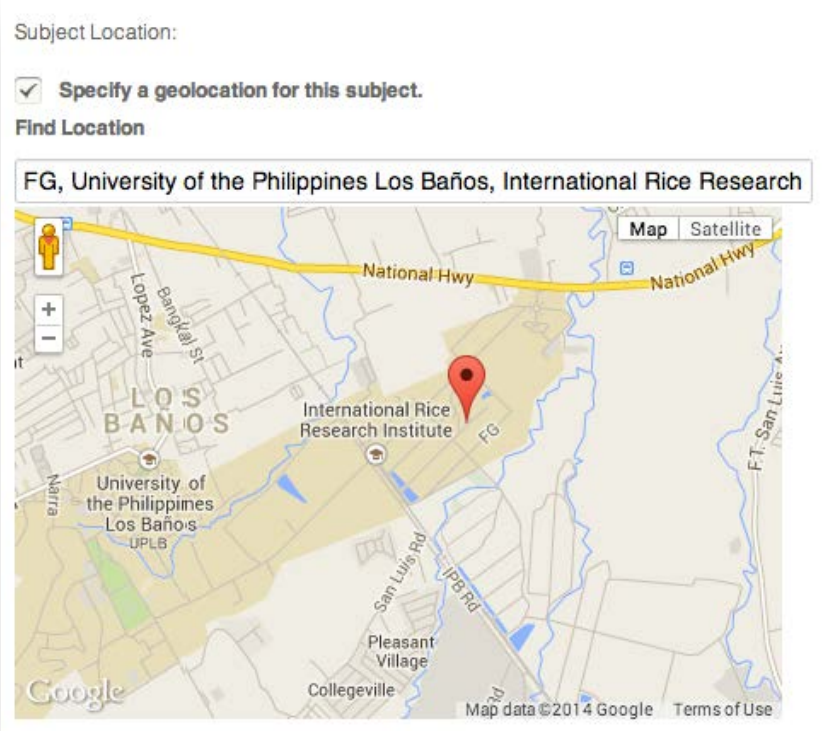


4. Upload an image to give your Subject a visual identity. Make sure the image is not Subject to third party copyright, e.g. by using an image that USAID already has the rights to. Subject images are shown in square renditions. If the image you upload is not square, tibbr will use a square crop of the center of the image as the Subject icon. Avoid using low-resolution images, as the Subject icon may appear pixelated.

5. Indicate the privacy level of the Subject. If there is no reason to restrict the privacy of the Subject, keep it open by choosing *Public.* Refer to the description of Subject privacy levels on page 56.

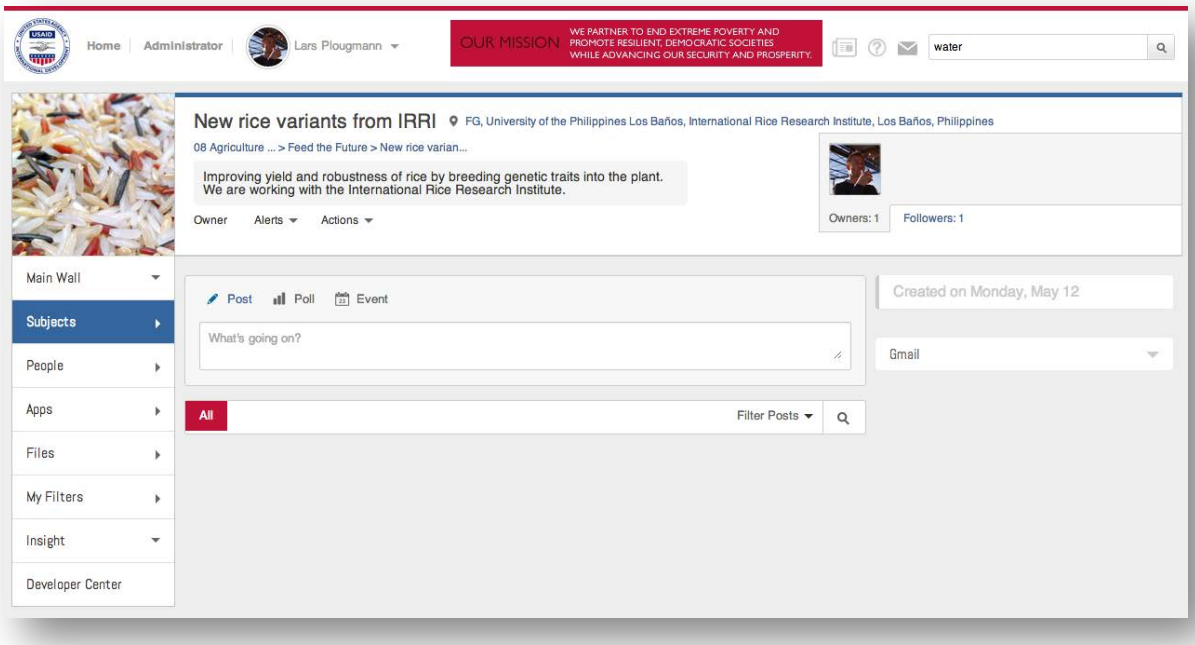
6. By default the checkbox "Allow Sub-Subjects to be created under this Subject" is active. Only uncheck it if there are specific reasons to ensure your Subject is an endpoint in the hierarchy.

7. By default, geolocation is not active for new Subjects. If your Subject is related to a place, you can indicate a geolocation by searching for it: Start typing in the *Find Location* field and matches will pop up for you to select. When you select a match, a map will be shown with a marker placed at the chosen location. You can zoom in on the map and adjust the marker position if necessary.



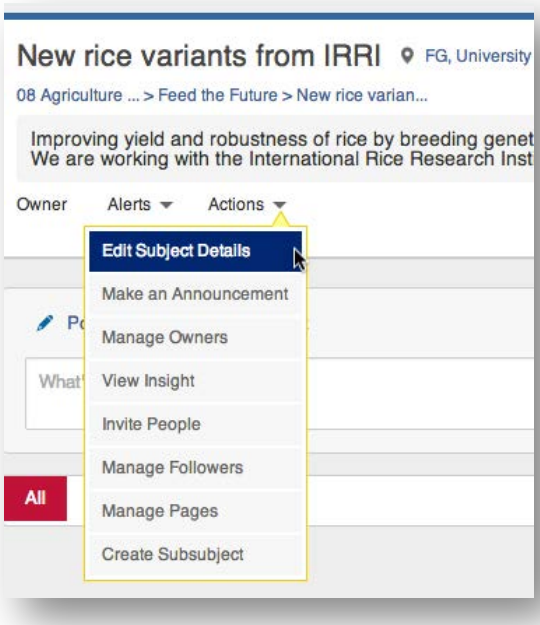
8. Press the *Create a Subject* button.

And, presto, you are now the owner of a fresh Subject on MyUSAID.gov.



When your new Subject is created, you are taken to the Subject page.

You can revisit any of the Subject settings you entered when you created the Subject by choosing *Edit Subject Details* in the Actions drop-down menu on the Subject page.



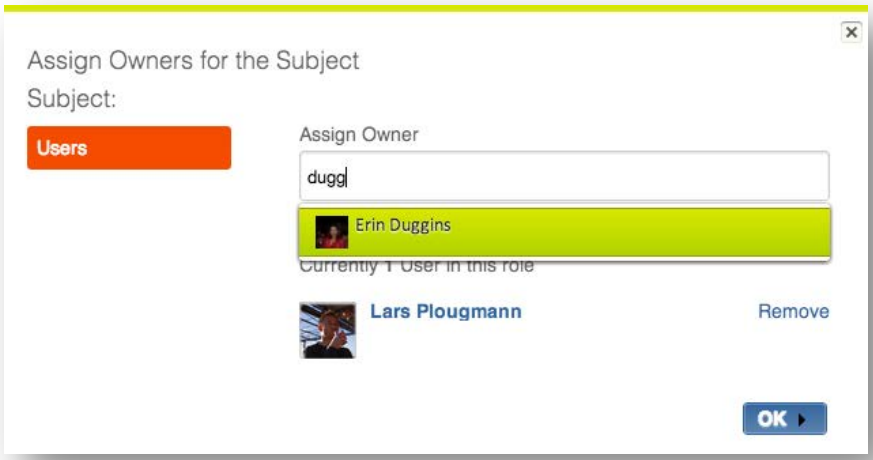
Subject Ownership

By default, you are the sole owner of a Subject you have just created.

It is best practice to nominate at least one other Subject Owner so there may be continuous ownership in case of absence or departures.

To add additional owners, follow these steps:

1. Go to the *Manage Owners* option in the Actions drop-down menu.
2. In the "Assign Owners for the Subject" pop-up, start typing the name of your preferred co-owner in the *Assign Owner* field. Review the matches, select the person and click *Add.*



3. Repeat the step above for each co-owner you want to nominate.
4. Press *OK* when you have added all the relevant co-owners.

If, at a later stage, you want to remove a co-owner, use the *Manage Owners* option again but select the *Remove* link to remove that co-owner. People who are removed as owners remain as followers of the Subject.

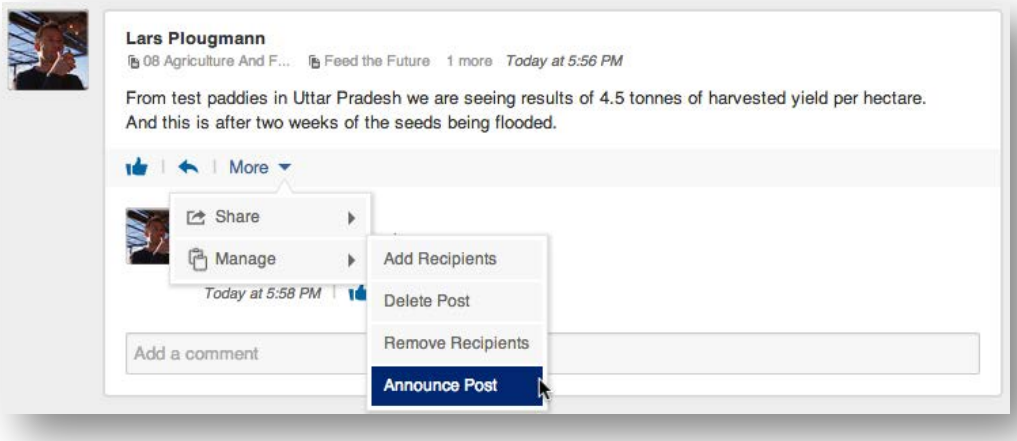
If your role changes and you want to abdicate your Subject Owner responsibility for a Subject, use the *Manage Owners* option as described above but click the *Remove* link next to your own name. You will remain as a follower of the Subject. You will only be able to remove yourself as an owner if a co-owner is already in place.

Launch your Subject

Your Subject now has the proper ownership, a cool title and an enticing description but it is still a bit barren. It is time to post a few updates so that the people you invite to follow and those who visit the Subject get a better sense of what is happening.

Follow these recommendations to add content to the Subject and enriching the experience for first time visitors to the Subject page.

1. Post two or more relevant updates to the Subject.
2. Consider making one of the posts a Subject announcement. As a Subject Owner you can do that by choosing *Announce Post* from the *More* > *Manage* menu on the post.



3. Consider cross-posting relevant historic threads to your Subject for additional content. Chances are that there are already threads in the rest of MyUSAID.gov that are relevant to the Subject. By locating those threads and adding them to the Subject you create a useful collection of knowledge concerning the topic, without having to draft all the content anew.

When your Subject is ready, invite the relevant colleagues to join the Subject. Follow the description below which details how to invite people to follow a Subject.

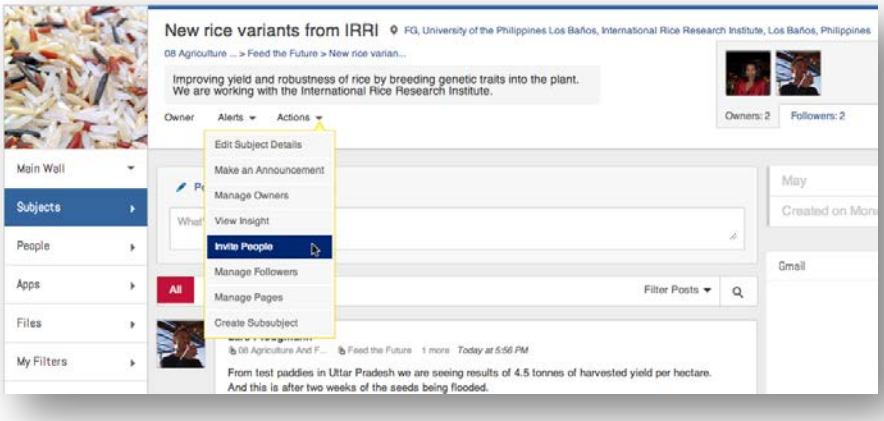
Managing a Subject

As a Subject Owner, you are the best placed to take an active role in managing the Subject. This section describes some best practices related to Subject management.

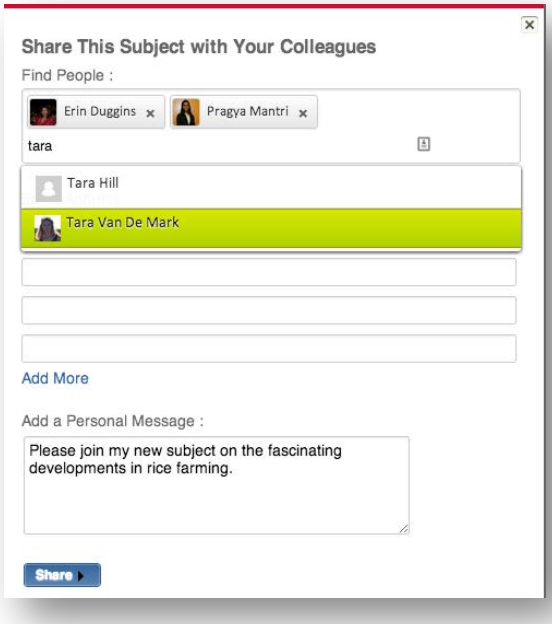
Invite your colleagues to the party

If a Subject you own is relevant to a colleague, be sure to invite them to follow the Subject. You can invite colleagues one at a time, or you can add a whole bunch in one go. Here is how:

1. Go to the Subject page. (The quickest way to do that is by hovering over the *Subjects* menu and either selecting the Subject if it appears in the list *or* start typing the name of the Subject and wait for the list to update, and then select the Subject.)
2. Choose the *Invite People* option in the Actions menu.



3. In the “Share This Subject with Your Colleagues” pop-up start typing in the name of the person you want to invite to the Subject. Choose the person to be invited once the correct match is displayed.



4. Repeat the previous step for each person to be invited to the Subject.
5. Add a message to go with the invitation.
6. Click the *Share* button.

The people you invite will receive an email encouraging them to accept the invitation to follow the Subject. The invitation will also be reflected in the notifications drop-down.

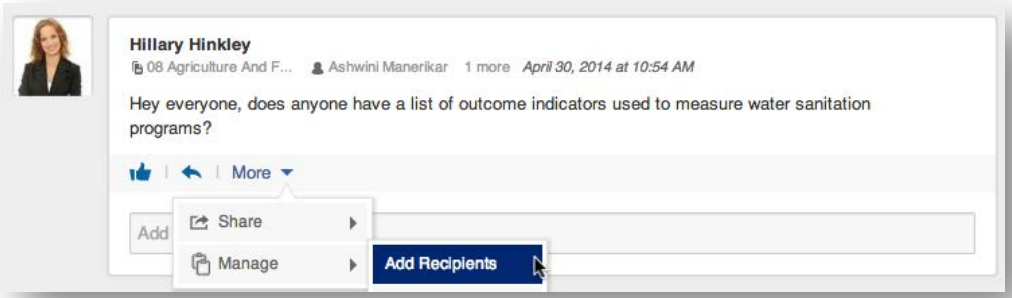
Content in, content out

Part of the responsibility of managing a Subject is to ensure it is an always up to date collection of relevant updates. This means adding updates to the Subject if they are relevant to the Subject matter but not posted to the Subject, and removing content that is not relevant.

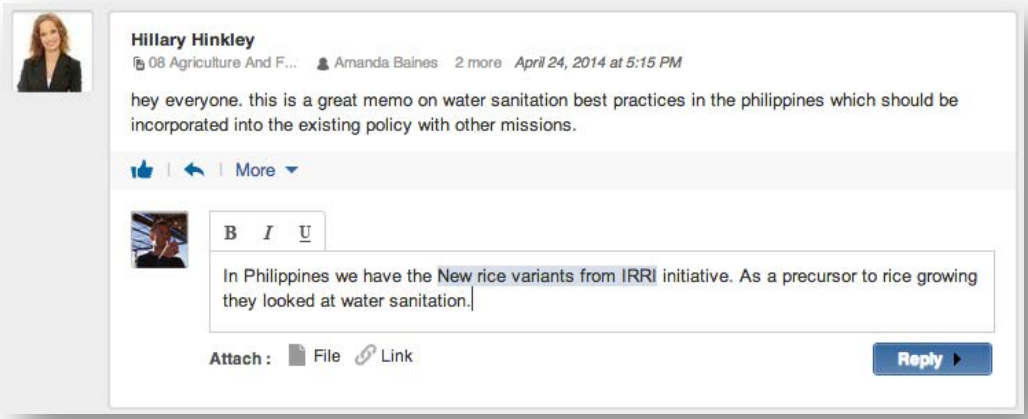
A Subject follower can add content to a Subject if the Subject is private or by approval. Anybody can add content to a public Subject. Only a Subject Owner, or the person who started the thread, can remove a thread from a Subject.

How to cross-post content that appears elsewhere… there are two ways of doing it.

- Use the *More* menu on the post and select *Manage > Add Recipients.* This brings pops up a dialogue where you can add your Subject.



- Or you can reply to the post and @mention the Subject. This allows you to be more specific about how the post relates to your Subject.



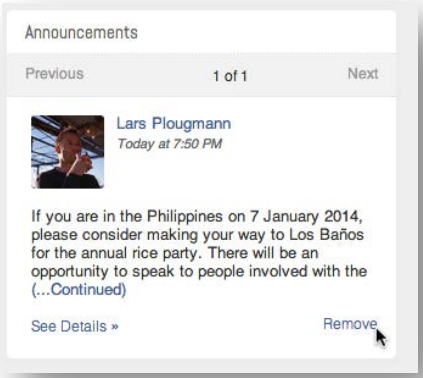
The first option is subtler: It will not be evident that you were the one adding the post to the Subject. Use the option that is most appropriate in each case. Avoid replies that have the Subject @mention but no further context.
Sometimes, you may find content in your Subject that isn't relevant. The post may have been added to your Subject because of a misunderstanding, or someone may try to extend the reach of their message by (inappropriately) including a lot of Subjects. When that happens, you can use the thread's *More* menu and choose *Manage > Remove Recipients.* Click the X next to your Subject in the list and click *Save Changes.*

Keep it fresh

While a Subject's followers can and will post content to a Subject, the Subject Owner is ultimately responsible for how the Subject is doing. Make it a habit to post updates to the Subject whenever there is a new development.

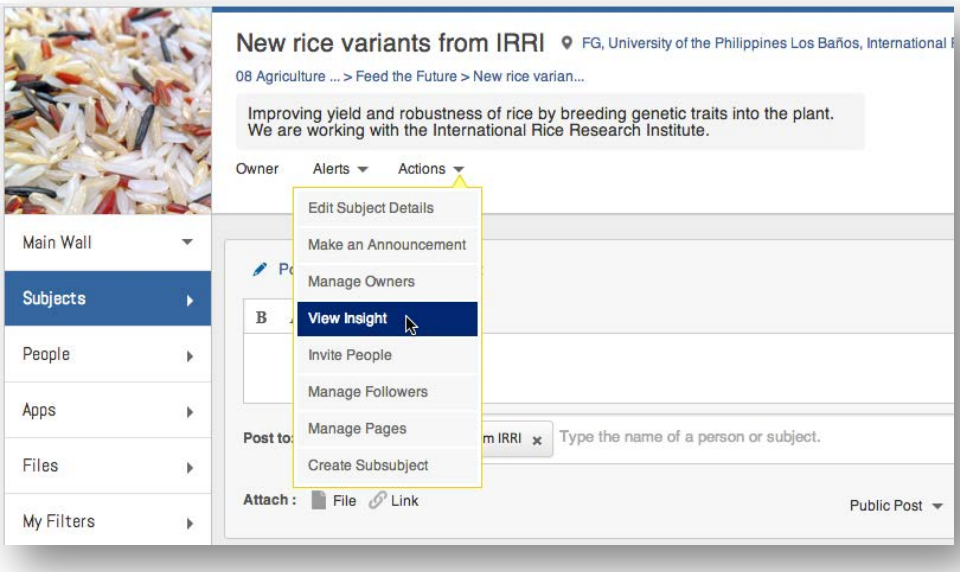
Remember that the people in the Subject represent a group of your colleagues who are interested that that particular topic. This makes the Subject a place well suited for asking questions, starting

discussions, sharing insights, co-drafting white papers etc. As long as the topic is relevant, your Subject should be kept relevant.
Visit the Subject regularly and check if Subject announcements, if any, are still timely. If not, remove them.



Gain insight

Just like the tibbr platform offers insight at the global level in the left-hand-side *Insight* menu, each Subject has its own *Subject Insight* panel.
Visit the Subject Insight panel at times. From the Subject page, choose *View Insight* in the *Actions* menu. Maybe some of the most frequent posters or visitors would be good choices as co-owners of the Subject. Maybe the post with the most popular attachment should be promoted as an announcement. Maybe you just want to compare two different Subjects you own.

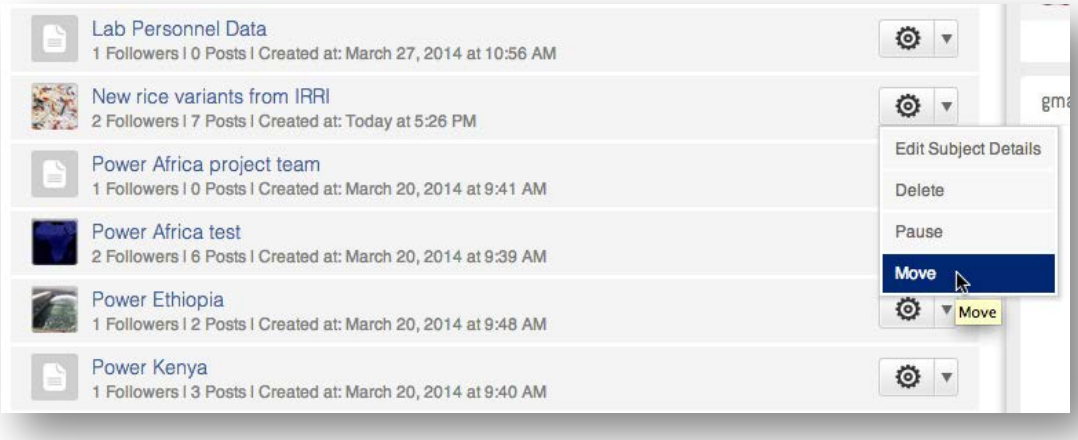


Moving day

The MyUSAID.gov Subject hierarchy is a dynamic structure. Your colleagues are creating Subjects, and at some point the project team may decide to restructure parts of the hierarchy.

These may be reasons that your Subject would sit better in a different part of the hierarchy. Or there could be different reasons, the important thing to know is that you can move a Subject you own. Follow these steps to move a Subject to a different part of the hierarchy:

1. Click the left-hand-side *Subjects* menu to display the Subject hierarchy.
2. Click the *My Subjects* tab.
3. Check the *Subjects I Own* box. You are now looking at a list of all the Subjects you own and each Subject as a cog-styled menu button to the right.
4. For the Subject you want to move, drop down the cog menu and select *Move.*



5. In the pop-up, navigate to the place in the Subject hierarchy that you want to be the new home of your Subject and click the *Move here* link.

Note the following about moving Subjects:

- When you move a Subject, all the Subject's Sub-Subjects move with it to the new destination.
- There are certain rules for where you can place a Subject. E.g. a public Subject cannot be a Sub-Subject to a private Subject.
- All the Subject's followers stay subscribed to the Subject. In fact, moving a Subject has very little impact on the Subject's followers.