

USAREC Regulation 5-01

Management

**USAREC
Knowledge
Management
Procedures and
Standards**

**Headquarters
United States Army Recruiting Command
Fort Knox, Kentucky
1 January, 2020**

UNCLASSIFIED

SUMMARY of CHANGE

USAREC Reg 5-01

USAREC Knowledge Management Procedures and Standards.

This expedited revision, dated 1 January, 2020—

- Establishes the USAREC Chief of Staff (CoS) as the KM owner for the organization
- Establishes the USAREC Assistant Chief of Staff, G5 (ACS, G5) as the KM champion for the organization.
- Defines the role of KM as a key strategic enabler within the G5
- Realigns KM from the USAREC G3 to the USAREC G5

Headquarters
United States Army Recruiting Command
1307 Third Avenue
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USAREC Regulation 5-01

Effective 1 January 2020

Management

Knowledge Management Procedures and Standards

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History. This is a revised publication dated 1 January, 2020.

Summary. This regulation provides the U.S. Army Recruiting Command (USAREC) with policies, procedures, and processes to gather, collaborate, and disseminate knowledge and knowledge products for use by Commanders and

staffs and is applicable at all levels within the command.

Applicability. This regulation is applicable to all Soldiers, Civilians, and Contractors assigned and attached to USAREC.

Proponent and exception authority. The proponent of this regulation is the Assistant Chief of Staff (ACS), G-5. The proponent has the authority to approve exceptions to this regulation that are consistent with controlling law and regulation. The proponent may delegate this approval authority, in writing, to a division chief within the proponent agency.

Army management control process. This regulation contains management control provisions in accordance with AR 11-2 but does not identify key management control that must be evaluated.

Supplementation. Supplementation of this regulation is prohibited.

Relation to USAREC Reg 10-1.

This regulation establishes USAREC Policies and procedures regarding Knowledge Management and procedures according to UR 10-1, Chapter 3-14a.

Suggested improvements.

Users are invited to send comments and suggested improvements on DA form 2028 (Recommended Changes to Publications and Blank Forms) directly to Cdr, HQ USAREC, ATTN: RCSD-KM, 1307 Third Avenue, Fort Knox, KY 40121-2725; or by e-mail to: usarmy.knox.usarec.list.hq-g5-km-div@mail.mil

Distribution: This publication is available in electronic media only and is intended for command level A.

This regulation supersedes USAREC Regulation 5-01, dated 11 July 2018.

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Glossary

Chapter 1.

KM Personnel and Responsibility

1-1. Purpose

This document is the USAREC publication for Knowledge Management (KM) operations at the USAREC headquarters and subordinate commands using collaborative capabilities. KM ensures USAREC integrates management of organizational knowledge through people, processes, and tools to leverage intellectual capital, enhance operational performance, and inform decision-making to fully embrace the Army's Mission Command philosophy.

1-2. References

Required and related publications and prescribed and referenced forms are listed in appendix A.

1-3. Explanation of abbreviations

Abbreviations used in this regulation are explained in the glossary (see appendix D).

1-4. Responsibilities

a. The USAREC Chief of Staff (CoS) is the KM owner for the organization and provides cross-functional decision making authority and influence for all KM initiatives in accordance with the commander's intent. The CoS will:

(1) Establish, instill, maintain, and improve USAREC-wide organizational culture to encourage, foster, and reward members who share their knowledge and ideas both virtually and in written form.

(2) Establish time criteria for the reporting of information required for common situational awareness and understanding necessary for the decision making process by the USAREC commander. Approve the command battle rhythm. Establish time criteria for specific reports required from the USAREC staff and component commands and approve the USAREC reports matrix.

(3) Ensure the USAREC staff integrates, shares, and synchronizes its activities internally, vertically and horizontally, with all supporting and supported commands and agencies and determine assignment of the USAREC KM program in accordance with FM 6-0 (Commander and Staff Organization and Operations).

b. The USAREC ACS G-5, is the KM champion for the organization and leverages KM principles to improve decision cycle effectiveness for targeting and positioning, command initiatives, force analysis, continuous process improvement, strategic planning, and organizational performance management.

c. Brigade Commanders and USAREC ACS are the KM stakeholders and are responsible for successful implementation of KM initiatives within their respective brigades and directorates.

d. The Chief Knowledge Officer (CKO) is responsible for achieving the USAREC KM strategic goals of the USAREC Commanding General and represents USAREC for the integration of USAREC KM within Department of Defense (DOD), Joint, Army, and TRADOC level KM initiatives.

e. The Knowledge Management NCOIC oversees the efforts of the KM Division in implementing strategic goals of USAREC KM. Also serves as an advisor to the USAREC staff in developing, implementing, and executing KM responsibilities and tasks.

f. The KM Knowledge Network Team consists of a staff of KM subject matter experts (SME) assigned to HQ USAREC Contractor-Full Time Equivalent (CFTE) personnel who provide assistance to headquarters directorates, special staffs, and subordinate organizations with implementation of KM programs and initiatives. Specific areas of assistance include but are not limited to:

(1) Developing local policies that facilitate KM initiatives and assistance with KM initiatives at Brigade level.

(2) Conducting KM assessments and training, and leading the effort to fuse people, processes, and tools to develop the common operating picture (COP), the organizational battle rhythm, and shared understanding.

(3) Serving as members of the KM working group and meeting as needed for purposes of operational planning, KM strategy development, and project team requirements, including process mapping, process improvement, and defining information flows and knowledge gaps.

g. While KM does routine process improvement and automation, the command Master Black Belt/Lean Six Sigma (MBB/LSS) deployment director serves as the command's SME for LSS program management and continuous process improvement, to improve organizational effectiveness relative to mission command, and is the interface between USAREC, TRADOC, adjacent, and DA (Office of Business Transformation) LSS deployment directors. Additionally, the USAREC MBB/LSS serves as the USAREC process improvement division chief, and is responsible for USAREC's process improvement program to include:

- (1) Project identification and selection.
- (2) Project management to set the goals, scope, and duration of a single project.
- (3) Execution of command sponsored/directed projects.
- (4) Management oversight of the command's LSS training and certification program.

1-5. Records Management Requirements

As decreed by AR 25-400-2, the records management (recordkeeping) requirements for all record numbers, associated forms, and reports are included in the Army's Records Retention Schedule-Army (RRS-A). Detailed information for all related record numbers, forms, and reports associated with AR 25-30 are located in RRS-A at <https://www.arims.army.mil>.

Chapter 2.

USAREC Knowledge Management Governance

2-1. KM Goals and Vision

End-state: KM promotes an all-inclusive knowledge sharing environment by enabling the use of documented work processes and information flows, organized content management, efficient KM systems, and helps to sustain recruiting success by enhancing shared understanding and decision making. This end-state is facilitated by the following major KM objectives:

- a. **LOE 1 — Work Processes:** Defined and documented work flows and business processes to enable continuous improvement and organizational performance.
- b. **LOE 2 — Information Flows:** Getting the right information in the right context and format when and where it is needed to effect informed and timely decision making.
- c. **LOE 3 — Content Management:** Managing how content is stored, accessed, archived, codified, and lifecycle to support short and long range planning and operations.
- d. **LOE 4 — KM Systems:** Assessing the use of, suggesting improvements, and leveraging both analog and digital systems used for the transfer of information, collaboration, and to enable organizational learning and growth.
- e. **USAREC KM Vision:** USAREC efficiently conducts mission command and habitually achieves mission success, driven by a culture of naturally instinctive knowledge sharing and continuous improvement.

2-2. KM Definition, Principles, and Responsibilities

- a. **KM Definition:** ADP 6-0 defines KM as “the process of enabling knowledge flow to enhance shared understanding, learning, and decision-making”. Additionally, ADP 6-0 lists knowledge management as one of the five key integrating processes that enable the operations process.
- b. USAREC's KM principles are derived from The Army Knowledge Management principles signed July 2008, ATP 6-01.1, and align with DOD, Army, and TRADOC's KM guidance and philosophies.
 - (1) Principle 1: Train and educate KM leaders, managers, champions, and workers to understand KM, the individual roles and responsibilities in a matrix organization, and how to recognize and implement corrective actions on underperforming processes and knowledge gaps.
 - (2) Principle 2: Use legal and standard business rules and processes across the enterprise; Inculcate continuous process improvement to create a culture of continuous, measurable improvement that eliminates non-value-added activities and improves quality.
 - (3) Principle 3: Use open portal architectures that permit single sign-on, authentication, and searching across the global enterprise to gain access to contextual knowledge and to store lessons learned and best practices for discovery.
 - (4) Principle 4: Communicate individual roles, responsibilities, and requirements to build and sustain KM through governance, policy, and resources to efficiently and effectively support mission command.
- c. The KM Process is defined in ATP 6-01.1 and consists of 5 steps: Assess, Design, Develop, Pilot, and Implement. USAREC KM follows this doctrinal model and adapts the steps to provide the most efficient and effective results in KM project management.
- d. **KM Training** is necessary to provide personnel who can align people, processes, and tools to ensure USAREC captures, retains, and reuses information and lessons learned in accordance with USAREC Pam 11-33 to improve performance and foster mission success. KM training is provided in both digital and classroom formats.
 - (1) Digital KM training is available in the Army Learning Management System (ALMS). Navigate to <https://www.lms.army.mil/> and search the catalog for “knowledge management”. Skillport KM offerings, including classes, books, and job aids, are found at <https://usarmy.skillport.com>, by searching for knowledge management.
 - (2) USAREC KM offers quarterly opportunities for the KM Representatives course. This is a 3-day course taught at FT Knox that prepares students to work on problems from a knowledge management perspective. Students learn to manage meetings, battle rhythms, assess the organization's KM proficiency, build staff and doctrine knowledge, apply the KM process, and evaluate problems in terms of organization, personnel, processes, and tools. Additionally, the AKM proponent at FT Leavenworth, KS provides a 3-week qualification course. The class

information is available by searching the Army Training Requirements and Resources System (ATRRS) course catalog at <https://www.atrrs.army.mil/atrrscc/>. Put “knowledge management” in the course title field to search.

2-3. The Knowledge Management Working Group

The knowledge management working group eliminates obstructions to knowledge flow and contributes to “shared understanding”. The knowledge management working group is the organization’s primary means of implementing knowledge management. The working group is how the knowledge management officer assesses and improves the transfer of knowledge in the organization. It also helps the CoS/Executive Officer (XO) improve knowledge flow. How the group’s ability mitigates bottlenecks and improves mission command determine success (ATP 6-01.1). USAREC KM applies an ad hoc approach to the KM working group in order to ensure the right members are available to guide desired outcomes for any given project. This eliminates repetitious meetings and ensures larger exposure to KM methods and principles across the organization.

2-4. The USAREC Knowledge Management Board (KMB)

a. Purpose: G-5 will establish the USAREC KMB as a governing entity responsible for improving, mentoring and sharing USAREC organizational best practices across the directorates and staff. It ensures lessons learned (UP 11-33) and best practices filter up and across while USAREC KM policy and strategy guides the priority of effort.

b. Composition: The USAREC KMB will be comprised with the Directors of the USAREC Principal Staff and Special Staff sections, and chaired by the USAREC CoS/CKO- The USAREC KMB will meet quarterly or at the discretion of the CoS.

2-5. Knowledge Management Tools

The USAREC KM Division leverages numerous tools to capture, create, and transfer knowledge, and to enable command wide shared understanding:

a. Integrated Knowledge Resources Online for Me (IKROme): IKROme is the primary portal landing page for all other web applications, and is directed by higher headquarters IT management. This platform provides role based access to recruiting applications. KM provides input to the functionality and design of the landing page, and is a member of the IKROme feedback distribution list.

b. SharePoint: SharePoint is the preferred web based tool that the KM division leverages when automating processes and transferring information. Refer to DA PAM 25-1-1

c. Army Knowledge Online (AKO): AKO <https://www.ako2.us.army.mil/content/armyako/en.html> serves as the primary enterprise portal for the Army and [is accessible to all Army organizations regardless of resident networks \(NASE, NASW, RSN etc.\)](#). KM serves as the administrative gatekeeper for all USAREC AKO instances.

d. milSuite: milSuite is the Army’s primary enterprise collaboration platform and allows for mission sensitive virtual discussions (e.g., OPSEC) that cannot be posted to forums such as Facebook. USAREC leverages Recruiting ProNet as the primary knowledge transfer tool for recruiters in the field. Additionally, content posted to ProNet is much more manageable than social media platforms on the .com domain. Recruiting ProNet may be accessed at this link: <https://www.milsuite.mil/book/community/spaces/apf/recruitingProNet>.

e. [Performance management: The Army Strategic Management System \(SMS\)](#), is the term applied for the Army’s primary enterprise strategic, and performance management tool <https://www.sms.army.mil/cms/>. The SMS platform is accessible by permission only, and only trained administrators can populate metrics, create dashboards, or approve viewing members. The KM division is trained as administrators, and assists USAREC with SMS content management. SMS training and information is available through the SMS milSuite group at: <https://www.milsuite.mil/book/community/spaces/orion/sms>. For additional training opportunities, contact the [USAREC KM team at usarmy.knox.usarec.mbx.hq-g5-km-div@mail.mil](mailto:usarmy.knox.usarec.mbx.hq-g5-km-div@mail.mil)

Appendix A

References

Section I

Required Publications

AR 11-2

Managers Internal Control Program

FM 6-0

Commander and Staff Organization and Operations

ADP 6-0

Mission Command

ATP 6-01.1

Techniques for Effective Knowledge Management

UP 11-33

Integration and Dissemination of Lessons Learned

Title 40, Code of Federal Regulations (CFR): 104-106 Division E

9.4-Knowledge Management

Section II

Related Publications

ADP 3-0

Operations

ADP 5-0

The Operations Process

DA PAM 25-1-1

Army Information Technology Implementation Instruction

Section III Prescribed Forms

This section contains no entries

Section IV Referenced Forms

This section contains no entries.

Appendix B

Content Management

B-1. Introduction

Content Management (CM) is the administration of knowledge content throughout its lifecycle – create, disseminate, archive, and destroy when no longer relevant. Effective CM organizes knowledge products logically for efficient utilization, transfer, and storage. Reliably available content allows for collaboration, knowledge creation, and enhanced shared understanding. CM is a critical aspect of KM that better enables decision making.

B-2. Purpose:

This annex to regulation 5-01.1 provides common policies, standards, and guidance for implementation of CM.

B-3. Content Management Roles and Responsibilities:

a. Content author/creator: Individual who creates information/knowledge and records it into a form that can be shared. Everyone is considered a content author/creator and is responsible for:

- (1) Identifying key words associated with the content and applying it to appropriate metadata fields
- (2) Recoding content into a form in which it can be understood and communicated
- (3) Updating information in order to keep it relevant
- (4) Ensure compliance with federal, legal, and classification principles

b. Organizational Content Management Specialists: Critical KM professionals who serve as the organizational lead for the training and execution of content processing, storage, and retrieval processes and procedures. These specialists help the staff manage content with processes and tools that facilitate the exchange of knowledge and collaboration. They develop, implement, and maintain content management standards within the four task areas of the content lifecycle: creating, disseminating, archiving, and removal. Duties and responsibilities include, but are not limited to:

- (1) Support implementation of the unit's content management policies and procedures
- (2) Collaborate with the KMO in order to develop comprehensive document naming conventions, data tagging policies, and data organization
- (3) Assist in the review of the unit's content across all digital and non-digital mediums to determine its relevance

(4) Remain abreast of current and future trends in content management

c. Organizational Leadership: Responsible for content authors/creators and Content Management Specialists.

- (1) Ensure content is current, relevant, and accurate.
- (2) Ensure Content Management Specialists are conducting CM audits.
- (3) Ensure compliance with CM principles, guidance, and best practices.

B-4. CM Principles and Tenets

a. Principles

(1) Visible: When content is not easily found across digital and non-digital platforms, it will lead to additional time searching, duplication of efforts, additional work, and unnecessary rework.

(2) Accessible: Users require the ability to access content based on platform medium, permissions, and network availability.

(3) Understandable: Organizational content and taxonomy structure need to be understood quickly. If users determine the instructions for use or access to the content are too complicated, they will not use it.

(4) Reliable: All content will be accurate and up to date. If the information is outdated, ensure it is archived or deleted.

(5) Interoperable: When possible, create a single standardized content source. If there are multiple silos (Share Drive, milSuite, etc.), consolidate them while removing duplicated and outdated information to ensure there is one place for users to go to access information.

(6) Responsive: Ensure the content can be easily adjusted based on changing situations. Content should be stored in a way that is functional to the users.

b. Tenets

- (1) Simplify recordkeeping methods
- (2) Minimize the burden on commanders, Soldiers, Civilians, and contractor personnel
- (3) Establish proactive control over operational records
- (4) Centralize record collection
- (5) Digitize once with multiple access
- (6) Ensure appropriate command emphasis
- (7) Incorporate records management requirements into training

B-5. Content Lifecycle

The content lifecycle is a group of multiple processes that follow a sequential, predictable, and repeatable process from the creation to destruction of content. The four stages of the content lifecycle are create, disseminate, archive, and destroy. It is important to understand the lifecycle, because without it, there cannot be content management and content would never be properly archived or destroyed.

B-6. Create

The create stage of the content lifecycle describes the process of creating or capturing data, information, or knowledge into a physical or digital medium that is understandable and sharable with others. When information is captured or created, there are many considerations that should be taken prior to dissemination:

- a. Determine where the content will ultimately be located. If it is a new location, what will the taxonomy structure be to access it?
- b. Who will be responsible for updating, archiving, and ultimately removing the information?
- c. What is the best format and file type for the content?
- d. Who will use the content, and for what purpose?

B-7. Disseminate

The disseminate stage of the content lifecycle can be broken down into two major tasks: collaboration and publishing. Collaboration entails editing, drafting, refining, and making content relevant. Publishing is delivering the content to the right person, in the right format, at the right time to make informed decisions. The publishing task is built upon several processes:

- a. Target audience: It is crucial to know who the content is intended for either the entire organization, a target audience outside the organization, or a target audience internal to the organization
- b. Accessibility: Ensures current, relevant, useful content remains accessible to those with a need to use it
- c. Metadata assigned or modified: Ensures metadata is updated, refined, or added in order to ensure the content can be easily discovered
- d. Content reviewed for relevance and usefulness: Ensures content is current, accurate, relevant, and useful
- e. Create a file plan: Content Managers will have a file plan in order to organize and categorize content to make it easier to retrieve when needed

B-8. Archive

The archive stage of the content lifecycle describes the tasks and actions associated with ensuring useful historical content is available and easy to find. The archival stage contains several processes within it.

- a. Identify content: Content that is no longer current or relevant will be archived. Organizational leadership, Content Management Specialists, and content authors/creators will determine if content meets the criteria to be archived or destroyed
- b. Retrieval: Content must be stored and organized for easy discoverability and retrieval
- c. Note: Information is only as good as the method of retrieval. It must be tagged with metadata and have an

index of what is covered.

B-9. Destroy

The destroy stage of the content lifecycle is one of the most important stages because it removes content once it is no longer useful, current, or relevant to the organization. Destruction prevents organizational repositories (digital and non-digital) from becoming filled with useless information that users must sort through to find relevant content.

B-10. Storage Guidance

Effective immediately, the USAREC workforce will comply with the following:

a. Imagery:

(1) Official: All photographic and video images regardless of the medium in which they are acquired, stored, displayed, recorded, or produced by persons acting on behalf of DoD actives, functions, or missions will be stored in a designated organizational location.

(2) Unofficial: Photographic and video imagery of personal events will not reside on any government medium.

b. Personnel documentation: Unofficial files or those that are personal in nature will not be stored on a government Share Drive or USAREC.

c. Develop taxonomy structure and assign a person on charge for all content. If no one owns the content, then it will be removed by the organization

B-11. SharePoint

All content will be reviewed monthly. Content older than two years must be reviewed for retention by the owner in accordance with the Army Records Management Program. Those records not required to be retained and not being used will be deleted.

Additional guidelines include:

a. SharePoint is not an archiving medium

b. Content's last modified date should be less than two years old from the current date

c. If versioning is utilized, ensure there is a limit to the number of versions (No more than three major and two minor versions)

d. Delete multiple copies of the same document.

e. If the document is a final draft, ensure it is saved as a PDF.

f. Dates and versions will be listed as columns in the app and not part of the file name.

g. Link publications and ARs to the originating source; do not upload entire document to any storage medium.

h. PII/PHI is not authorized to be stored on SharePoint unless restricted by permissions to authorized personnel only.

i. A document description must be added to a document to increase the search-ability of the documents

j. Avoid the use of folders, utilize metadata, no more than two clicks to a document is best practice per ATP 6-01.1, Techniques for Effective Knowledge Management

k. Published documents:

(1) Only documents that are finalized and pertinent to the organization,

(2) Ideally this information is only one click away from the top page.

(3) No subfolders – utilize metadata.

l. Shared Documents:

(1) This includes files that may be in draft form that need to be shared with the command and/or lower priority of information

(2) Ideally this information is no more than two clicks away from the top page.

(3) No subfolders – use metadata.

B-12. Shared Drive

All shared drive content will be reviewed quarterly, and content older than six years must be reviewed for retention by the owner in accordance with the Army Records Management Program. Those records not required to be retained and not being used will be deleted.

Additional guidelines include:

- a. Make general, yet intuitive folder titles (Do not make unnecessary folders; the overall folder structure should be flat, not deep. Operational Orders (OPORD) and annexes should not need separate folders – a good naming convention makes finding information easy)
- b. Do not have individual folders for personnel in the organization
- c. PII/PHI is not authorized to be stored on Shared Drives

B-13. Email

All email content will be reviewed quarterly, and content older than six years must be reviewed for retention by the owner in accordance with the Army Records Management Program. Those records not required to be retained and not being used will be deleted.

Additional guidelines include:

- a. Avoid sending emails with attachments. The transmission of email attachments to large groups exponentially consumes network storage capacity. (Elimination of email attachments saves storage space, decreases file duplication, and helps identify authoritative content).
 - b. Keep emails short and readable within a minute. If the message is more complicated, summarize it in five to seven lines in the email and provide a link to a larger document.
 - c. Bottom Line Up Front (BLUF) provide this so that the reader can immediately answer the question: “What am I supposed to do with this email?”
 - d. Email Subject
 - (1) Keep each email to a single topic
 - (2) Create subject lines that clearly identify actions required and associated deadlines
 - (3) Do not change topics in replies
 - (4) Start another email with an appropriate subject if another topic needs to be addressed
 - (5) To increase responses to email, follow a taxonomy for the first several words in a subject line, such as:
 - (a) ACTION – Recipient in the To line needs to complete an action
 - (b) FYSA – For situational awareness of recipient in To or “Carbon Copy”
 - (c) RFI – Request for Information; To ask the recipient in the To line for information
 - e. Stay mindful of email etiquette when adding recipients not included on an original email
 - f. Process each email one at a time to completion. All messages can be dealt with in one of four ways:
 - (1) Delete – Some emails don’t apply to the recipient or may need to be scanned and discarded
 - (2) Do – These tasks can be accomplished in two minutes or less
 - (3) Delegate – Forward the message to the appropriate doer
 - (4) Defer – Create a task or calendar item for this message so the user can focus his or her effort on it later.
- Then, return to clearing the inbox

B-14. Hard Copies

All hard copies stored in the organization will be reviewed semiannually and content older than six years must be reviewed for retention by the owner in accordance with the Army Records Management Program. Those records not required to be retained and not being used will be destroyed. It is extremely critical to protect content of organization prints or copies.

B-15. Taxonomy and Metadata

a. Taxonomy: Within content management, taxonomy refers to the hierarchical structure of the content management system. File structure will be organized to allow better opportunity to “drill down” while minimizing clicks. Additionally, taxonomy serves the following purposes:

- (1) Provides structure to vast amounts of unstructured, unorganized, and physically distributed content

Addresses difficult and time-consuming searches for critical information

Prevents variations in vocabulary and distribution methods, and obscure information associations

- (2) Allows users to discover and learn

- (a) Quickly and visually presents “big picture”

- (b) Creates an explicit and functional map of an organization's knowledge base

- (c) Allows easy drill-down and browsing of more detailed categories of related information

- (d) Allows users to discover new associations/relationships

b. Provides context to information retrieval; disambiguate results; provides more targeted discovery when combined with narrowed search.

- (1) Provides consistency in business language and information organization

- (2) Search tools alone are inadequate

- (a) Are useful when the user knows what he or she is looking for

- (b) Do not provide structure or big picture

- (c) Do not enable users to make new associations or discover what they don't know

c. Metadata: Metadata is “data” about “data” or “information about objects.” Metadata provides additional information to content in order to make it easier to discover. Metadata is the means for taxonomy to be applied and achieved. Metadata will be populated according to the following guidance:

- (1) Office documents: Built-in document properties contain information about a document that describes or identifies it in some way. The specific steps to add key and searchable metadata to Office documents are: Click the file button while respective document is opened and point to info, and then click Properties. Click the arrow next to Properties to select the set of properties that you want to view or change.

- (2) SharePoint lists and document libraries: lists and libraries are used by SharePoint to organize and manage content. SharePoint users can create specific metadata based on the type of list or document library. This metadata may be expanded based on the requirements. The use of relevant and specific metadata provides the ability to sort and filter list items and documents for effective access and retrieval of specific knowledge items and documents.

B-16. Naming Conventions.

Consistent naming conventions are essential for user understanding and for proper application of various office/administrative applications, to include SharePoint, Share Drive, Outlook, Mission Command Systems, etc. Although some systems may have specific requirements, the KM Division recommends that files or documents follow these naming convention guidelines:

- a. Keep the name short and simple – use universal acronyms, see Ref. Joint Pub 1-02

- b. Do not use spaces in the file or folder name; use an underscore in place of the space or “Camel

- c. Capitalization”: for example: Daily Updates or Daily Updates

- d. Do not repeat information already included in the library or folder name

- e. Do not use special characters or symbols. The characters allowed are () _ -

- f. File names will be limited to 30 characters in length

- g. Do not include the words “Final” or “Draft,” instead save final versions as a pdf

- h. Do not add version numbers at the end, instead use a column name or add the information to the document properties to identify the version number

- i. Do not include the date, instead use a column name or add the information to the document properties to identify the date
- j. Standard name format example: CTD Personnel Tracker
- k. Classification for NIPR systems is FOUO or below (U)

B-17. Best Practices

- a. Design content strategy around stakeholder requirements
- b. Position content as a strategic asset and tie its creation and use to operational goals
- c. Clearly identify accountability between content related processes and systems administrators, and those who own the actual content
- d. Align the type and format of available content to the intended audience
- e. Establish distinct channels for screened and unscreened content
- f. For content contributions, balance metadata requirements with the need for a streamlined user experience
- g. Maintain strong accountability for content review cycles – dispense with content of questionable value
- h. Use technology migrations as an opportunity to clear outdated content
- i. Create taxonomies that reflect how users think about content
- j. Use scope, metadata, and manual curation to ensure that search functions return the most relevant results

B-18. Audits.

Audits are a crucial part of CM because most networks have thousands of pages of content that are never or rarely visited. Often 5% of a site's content is pertinent information, while the other 95% is insignificant data. So, it stands to reason that a Content Manager should focus on that 5% and make sure that it is accurate. There are two tools to conduct an audit: manually with a spreadsheet carried out by Content Management Specialists, or automated with a script carried out by the CIO/G6.

B-19. Content Audit Process.

Two steps to identify and rank content.

- a. Inventory is the process and the result of cataloging one's content (files or data can be digital or hard copy)
- b. Auditing is the process of evaluating content elements and information assets on part or all (files or data can be digital or hard copy)

B-20. Content Audit Tools.

Generic term used for any instrument that can be used to capture data so that it may be undertaken for an audit.

B-21. Spreadsheet.

An electronic document in which data is arranged in the rows and columns of a grid and can be manipulated and used in calculations. A simple spreadsheet can be used to capture information and help make decisions.

- a. Columns needed in a spreadsheet include:
 - (1) Content item – Is this the right information?
 - (2) Format – Is it in the correct format?
 - (3) Target audience – Is it readily available to the correct audience?
 - (4) Folder/parent (location) – Is it located in right place?
 - (5) Owner – Is there someone responsible for the content?
 - (6) Date last modified – Is the information current?
 - (7) Views – Is the content still being utilized by anyone?
 - (8) Decision – Keep, archive, or destroy the content
 - (9) Comments – Indicate if there is any value to retaining the document
- b. Script or scripting language with a series of commands within a file is capable of being executable without

being compiled. Scripts are a good audit tool that can be used to search for duplicate files, files of a specific size, and even a type of file. In auditing sites, a good rule of thumb is to delete any information over six years old.

(1) SharePoint Action Network (SPAN): Any Site Collection, site, or content that has not been modified within the last four years will be removed from the USAREC Intranet during routine scans. This will be accomplished using an automatic script. Thus, it is the responsibility of the Site Collection Administrators, Site Owners, and contributors to ensure their site collections, sites, subsites, and apps are reviewed and modified on a regular basis.

(2) Shared Drive: All content that has not be modified within the last six years will be removed from the USAREC Share Drive during routine scans. This will be accomplished using an automatic script. Thus, it is the responsibility of the Content Management Specialists and content authors/creators to ensure their content is reviewed and modified on a regular basis.

Glossary

Section I

Abbreviations

ACS

Assistant Chief of Staff

AKO

Army Knowledge Online

AR

Army Regulation

ATRRS

Army Training Requirements and Resources System

CKO

Chief Knowledge Officer

CFTE

Contractor Full Time Equivalent

CoS

Chief of Staff

DA

Department of the Army

HQ, USAREC

Headquarters, United States Army Recruiting Command

IAW

In Accordance With

KM

Knowledge Management

KMB

Knowledge Management Board

KMO

Knowledge Management Officer

KMWG

Knowledge Management Working Group

LAN

Local Area Network

LOE

Line of Effort

SPAN

SharePoint Action Network

SME

Subject Matter Expert

UP

USAREC Pamphlet

USAREC

United States Army Recruiting Command

Section II

Terms

Content management

A set of processes and technologies that support the collection, management, and publication of information in any form or medium.

Data

Facts or statistics collected together for reference or analysis.

Data tagging

The process of applying specific HTML tags to define metadata on Web pages.

SharePoint

Army Enterprise Web based platform leveraged by KM and other developers to enhance process improvement, shared understanding, and decision making.

Information

Facts provided or learned about something or someone.

Information systems

A combination of hardware, software, infrastructure, and trained personnel organized to facilitate planning, control, coordination, and decision making in an organization.

Knowledge

Skills acquired through experience or education; the theoretical or practical understanding of a subject.

Knowledge gaps

Organizational knowledge that is needed but non-existent or difficult to locate.

Knowledge management

The art of creating, organizing, applying, and transferring knowledge to facilitate situational understanding and decision making.

Knowledge network

The operational knowledge environment of an organization consisting of people, processes, and technology

Knowledge transfer

A component of organizational learning that identifies processes for spreading knowledge within the organization to organizational stakeholders.

Operations security

Methods and means to gain and maintain essential secrecy about critical information.

Recruiting ProNet

A military professional forum that allows exchange of information and knowledge between geographically dispersed Soldiers assigned to USAREC.

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