



Headquarters  
United States Army Recruiting Command  
1307 Third Avenue  
Fort Knox, Kentucky 40121-2725

## USAREC Regulation 5-01

Effective 1 February 2023

### Management Knowledge Management Procedures and Standards

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**History.** This publication is a major revision, dated 1 February 2023.

**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 staff and is applicable at all levels within the command.

**Applicability.** This regulation applies 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 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 Army Regulation (AR) 11-2 but does not identify key management control that must be evaluated.

**Supplementation.** Supplementation of this regulation is prohibited.

**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](mailto: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.

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\*This regulation supersedes USAREC Regulation 5-01, dated 1 January 2020

# SUMMARY of CHANGE

USAREC Reg 5-01

Knowledge Management (KM) Procedures and Standards.

This is a major revision, dated 1 February 2023—

- Establishes the USAREC Chief of Staff (CoS) as the KM owner for the organization.
- Establishes the Director, USAREC Commander's Initiatives Group as the KM champion for the organization.
- Defines the role of KM as a key strategic enabler within the command and the process owner for migration to the A365 Environment.
- Updates the USAREC KM Principles to align with the four Department of Defense (DOD), Joint, and Training and Doctrine Command (TRADOC) KM outcomes.

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## Chapter 1

### Introduction

#### Section I

##### General

###### 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 that 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 and Control doctrine.

###### 1-2. References, forms, and explanation of abbreviations

See appendix A. The abbreviations, brevity codes, and acronyms (ABCAs) used in this electronic publication are defined when you hover over them. All ABCAs are listed in the ABCA database located at <https://armypubs.army.mil/abca/>

###### 1-3. Associated publications.

No entry.

###### 1-4. Responsibilities

See section II of this chapter.

###### 1-5. Records management (recordkeeping) requirements.

The records management requirement for all record numbers, associated forms, and reports required by this regulation are addressed in the Army Records Retention Schedule-Army (RRS-A). Detailed information for all related record numbers, forms, and reports are in Army Records Information Management System (ARIMS)/RRS-A at <https://www.arims.army.mil>. If record numbers, conditions, and reports are not current, addressed, and published correctly in ARIMS/RRS-A, see DA Pam 25-403 for guidance.

#### Section II

##### Responsibilities

###### 1-6. The USAREC CoS

The 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:

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

b. Establish time criteria for reporting 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.

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

d. The USAREC Director, Commander's Initiatives Group (CIG), 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.

e. Brigade Commanders and USAREC HQ Directors are the KM stakeholders and are responsible for successfully implementing KM initiatives within their respective brigades and directorates.

f. 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.

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

h. The USAREC CIG KM Division consists of a staff of KM subject matter experts (SME) who assist headquarters directorates, special staff, and subordinate organizations with the implementation of KM programs and initiatives. Specific areas of assistance include but are not limited to:

(1) Develop local policies that facilitate KM initiatives and A365 environment implementation and migration command wide.

(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 meet as needed for operational planning, KM strategy development, and project team requirements, including process mapping, process improvement, and defining information flows and knowledge gaps.

## 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, and efficient KM systems, and helps to sustain recruiting success by enhancing shared understanding and decision-making. The following primary KM Lines of Effort (LOE) facilitate this end-state.

a. LOE 1 — Work Processes: Defined and documented workflows 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 life-cycled 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 enabling organizational learning and growth.

e. USAREC KM Vision: USAREC efficiently conducts mission command: command and control 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: Army Doctrine Publication (ADP) 6-0 defines KM as “the process of enabling knowledge flow to enhance shared understanding, learning, and decision-making.” 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 Army Education Accreditation Standards (AEAS) 1C, Army Training Publication (ATP) 6-01.1, and align with Joint, DOD, Army, and TRADOC, KM guidance and principles to address four primary outcomes.

- (1) Principle 1: Enhance Mission and Organizational Performance.
- (2) Principle 2: Improve Decision Cycle Effectiveness.
- (3) Principle 3: Create an Agile Learning Organization.
- (4) Principle 4: Facilitate Shared Understanding through Collaboration.

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. USAREC KM offers quarterly opportunities for the KM Representatives course. This 3-day course taught at Ft Knox prepares students to work on problems using the 5-step KM process. 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 Army Knowledge Management (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/atrrsccl/>. Put "knowledge management" in the course title field to search.

### **2-3. The KM Working Group**

The A365 migration team transitions to the knowledge management working group in the 4th quarter of 2023. 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 knowledge transfer 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 determines success (ATP 6-01.1).

## **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: Command and Control of Army Forces.

###### **ATP 6-01.1**

Techniques for Effective Knowledge Management.

###### **USAREC Pamphlet (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.

###### **Chairman of the Joint Chiefs of Staff Instruction (CJCSI) 5780.01**

Joint Knowledge Management Program.

#### **Section III Prescribed Forms**

This section contains no entries.

#### **Section IV Referenced Forms**

This section contains no entries.

## Appendix B

### Content Management (CM)

#### 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 appendix to regulation 5-01 provides common policies, standards, and guidance for implementing CM.

#### B-3. CM 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 the following:

- (1) Identifying keywords 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 to keep it relevant.
- (4) Ensure compliance with federal, legal, and classification principles.

b. Organizational CM 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 removing. Duties and responsibilities include, but are not limited to:

- (1) Support the implementation of the unit's content management policies and procedures.
- (2) Collaborate with the Knowledge Management Officer (KMO) 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 CM 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 that 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: All content will be stored on the A365 environment. Personal files will be managed on One Drive, Teams files will be managed on Teams or One Drive for business, and content that applies to large groups, including command-wide relevance, will be stored on SharePoint Online.

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

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

### **B-6. Create**

The creation 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 shareable 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 update, archive, and ultimately remove 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 dissemination 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 correct 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 whom 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 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 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: No current or relevant content will be archived. Organizational leadership, Content Management Specialists, and content authors/creators will determine if the content meets the criteria to be archived or destroyed.

b. Retrieval: Content must be stored and organized for easy discoverability and retrieval.

**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 critical 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**

a. Effective immediately, the USAREC workforce will migrate all content on Shared Drives and legacy RSN SharePoint to the A365 environment (Teams, SharePoint Online (SPO) or One Drive).

b. 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.

c. Published documents.

(a) Only documents that are finalized and pertinent to the organization.

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

(c) No subfolders – utilize metadata.

d. Shared Documents:

(a) This includes files that may be in draft form that needs to be shared with the command and lower-priority information.

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

(c) No subfolders – use metadata.

### **B-11. Hard Copies**

All hard copies stored in the organization will be reviewed semiannually. 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 highly critical to protect the content of organization prints or copies.

### **B-12. Taxonomy and Metadata**

a. Taxonomy: Within content management, taxonomy refers to the hierarchical structure of the content management system. The file structure will be organized to allow a 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 complex 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 the “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; disambiguates 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 to 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 content information 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 the respective document is opened, 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 list type or document library. This metadata may be expanded based on the requirements. Using 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-13. Naming Conventions**

Refer to Appendix C, A365 Governance of this regulation. Keep the name short and simple – use universal acronyms; see Ref. Joint Pub 1-02.

a. Do not use spaces in the file or folder name; use an underscore or hyphen in place of the space or “Camel Hump.”

b. Capitalization”: for example, Daily\_Updates or DailyUpdates.

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

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

e. File names will be limited to 30 characters in length.

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

g. 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.

h. Do not include the date, instead use a column name, or add the information to the document properties to identify the date.

i. Standard name format example: CTD-PersonnelTracker.

j. Classification for NIPR systems is CUI or below (U).

#### **B-14. 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. 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 the 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-15. 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 ensure 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-16. Content Audit Process**

Two steps to identifying and ranking 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 a digital or hard copy).

#### **B-17. Content Audit Tools**

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

#### **B-18. 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 the 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 can be 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. A good rule of thumb in auditing sites is to delete any information over six years old.

## Appendix C

### USAREC Army 365 Governance

#### C-1. Purpose and Applicability

To provide guidance and best practices using Army 365 for collaboration, content management, and business processes.

a. This document is not intended as a complete user guide for all the components and tools in the Army 365 environment. Its purpose is to provide best practices, guidance, and business rules to maximize the effectiveness of Army 365. Training materials and links to user guides are available in the Army 365 Teams environment: Army 365 Learning Hub – Get Training and the US Army 365 Training Team-Training Videos and Quick Guides channel.

b. This governance is reviewed and updated annually.

#### C-2. Protection of Information

The current Authority to Operate (ATO) provides for storing and maintaining Controlled Unclassified Information (CUI) (Personally Identifiable Information (PII), Personal Health Information (PHI), etc.) in any part of the Army 365 environment (Email, One-Drive, Teams, and SPO with the express direction that YOU are responsible for ensuring that the content is appropriately secured and accessible only by those who have a legitimate business need to know.

#### C-3. Army 365 Description and Major Applications:

Army 365 is a collective term for a suite of integrated applications accessible via the Office 365 home site: <https://www.ohome.apps.mil>. Most Army 365 applications also have a desktop app. As the Army 365 suite evolves, additional tools will become available, and this guide will be updated accordingly. There are five major applications addressed in this document. Other applications are available for the end user to learn and employ to gain efficiencies in their workplace. The five major applications are as follows:

a. Teams – A collaboration application allows users to create teams, share files, conduct meetings, and chat. The “back end” of any team is a SharePoint (SP) site. Teams shall always be used as the working and collaboration space for any information requirements.

(1) Public Teams. In Army 365, a public team is accessible to everyone in the Army. Public teams are not restricted to USAREC personnel only. They are discoverable by anyone with a valid Army 365 account.

(2) Private Teams are members-only, and the team owner must manually add those members.

(3) Roles and Responsibilities.

(a) Owner: This is the individual who creates the Team. Any individual with an Army365 account can create a Team. The owner is responsible for creating the Team based on current business requirements and set it to Public or Private. There should be at least two owners for every Team. They also set permissions for their users. Private Channels should be created when CUI/PII/PHI is needed to be captured in the Team. Access to these channels will be limited to only those individuals that have a need to know.

(b) Member: Any individual that joins or has been added to a Team. Members’ responsibilities are to manage the content they contribute to the Team. The individual adding that content is the owner of said content and is responsible for the security of that content. Only allowing individuals access with a need to know unless content is for public viewing.

(c) Naming Convention: All team names, public or private, will begin with “TR-USAREC-HQ-DIR-DIV” or “TR-USAREC-BDE-BN” to simplify discovery within the Teams panel.

(d) Keep team and channel names to 40 characters or less to preserve readability in the Teams panel.

(e) PII/PHI will be stored in a Private Channel.

(f) Teams SharePoint: Army 365 components are built on a SharePoint site, including Teams and OneDrive. To open a SharePoint site created as part of a Team, select the Files tab in any channel and select "Open in SharePoint." You can also see a list of all SharePoint sites you're following in Teams via the SharePoint link on the Army 365 home site.

b. OneDrive – Cloud-based file storage integrated into Teams allows users to store and share files. The "back end" of OneDrive is SharePoint (SP). Your computer should have the OneDrive desktop application, which will allow you to synchronize files on your local computer with your cloud-based file storage. OneDrive is accessible via the available apps panel in Army 365 home (<https://www.ohome.apps.mil/>) or the "Files" control on the left side of the Teams interface. You should also use the OneDrive desktop app to create a synchronized copy of your OneDrive on your local computer.

(1) Roles and Responsibilities: Owner: Files and sharing from OneDrive are the individual's responsibility. All individuals with shared content from OneDrive are responsible for ensuring it is safeguarded. PII/PHI will only be shared with those who have a need to know. The individual that shares the content is the content owner. If working with multiple individuals within a shared library, ensure that at least two personnel are owners.

(2) Basic Information: Your personal OneDrive has 1TB of space. The content you place on One Drive is accessible from any organization that provides A365 account access.

c. Outlook – Email, task lists, people finder, and calendar that can be shared and integrated with other apps. You can also create groups that work as distribution groups, allowing you to communicate with specific people, schedule events, and share files via a SharePoint backend. An Outlook group is the standard for the creation of a Team. Outlook is accessible via the available apps panel in Army 365 home (<https://www.ohome.apps.mil/>) or via the Outlook desktop app. You have 100 gigabytes of storage space in Outlook.

(1) Files and content shared from Outlook are the individual's responsibility. Receivers of information inherit the responsibility.

(2) Any messages that include PII or PHI must be encrypted and shared only with recipients that have a legitimate reason for having this information.

(3) Basic Information: Outlook has 100GB of storage. Your outlook calendar is synched with your Teams calendar. You can create groups to use as a distro list and then apply those same groups within Teams and other applications within the environment.

d. SharePoint OnLine (SPO) – a separate SharePoint application for USAREC to share final documents and collect data that needs to be displayed for adjacent, higher, or subordinate organizations. This will be a roles-based application managed by the Knowledge Management Division.

(1) Roles and Responsibilities.

(a) Owners: The individual that created the Team is the SharePoint site's owner and any other team owners. These individuals are responsible for the site's management regarding navigation, the creation of additional applications like lists, libraries, and pages, as well as permissions to applications within their site.

(b) Members: This is anybody that must contribute access to the site. They can be made owners of their respective applications like a list or library, allowing them to manage the content in those applications.

(2) Permissions and Site Management

(a) Major Command Level Administrator (MCLA): This is a MACOM position responsible for communicating requirements to DA and reviewing and approving USAREC requests. These individuals must be GS employees or military personnel with decision-making authority.

(b) Command Hub Administrator (CHA): The positions must be filled by GS employees or military personnel with decision-making authority to approve requests from within the command and forward them to the MCLA. They will also manage the look and feel navigation of the HUB and any site collection

connected to it. At least one of these positions will be filled by the KMO. The USAREC CHA resides in the KM division and manages all requests concerning SPO business needs.

(c) Delegated Command Hub Administrator (DCHA): Individuals in these positions will implement changes to the HUB as directed by the CHA and be the Command's SMEs for SPO.

(d) Local Site Collection Administrators (LSCA): These individuals will manage their respective site collections regarding navigation, creation of additional applications like lists, libraries, and pages, as well as permissions to applications within their site collection. There will be at least two and no more than five individuals assigned to this role per site collection. LCSA will ensure that the KMO fully controls its site collection for support purposes.

(e) Members/ User: This is anybody with access to the environment. They can be made owners of their respective applications like a list or library, allowing them to manage the content in those applications. When an individual adds content to SPO, they are the content's owner and responsible for ensuring that it is relevant, and the document is in its final format. Do not put multiple versions of the same document within SPO. Guidance on managing your content can be found in Appendix B of this regulation UR 5-01.

### (3) Naming convention

(a) All SharePoint sites will follow the naming convention that TRADOC has established. Names will follow the same structure as the Teams names, "TR-USAREC- HQ-DIR-DIV" or "TR-USAREC-BDE-BN."

(b) Basic Information: Each site has 25TB of space allocated to it and displays final content for command consumption. Content can flow horizontally and vertically. SPO affords command-wide data collection; provides search capabilities across the Army 365 environment.



## **Glossary of Terms**

### **Content management**

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

### **Data**

Facts or statistics are collected 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 are organized to facilitate an organization's 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 the exchange of information and knowledge between geographically dispersed Soldiers assigned to USAREC.

# USAREC

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