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A365 SharePoint Online: Do's & Don'ts for Managing Your Content

A365 SharePoint Online (SPO) is a cloud-based suite of tools, and services for work productivity. The thought of how to manage content in A365 can be overwhelming- but it doesn't have to be. The more planning you do upfront will help determine how successful you are at managing your content. Content management aims at managing structured and unstructured information and keeping track of that information throughout its entire lifecycle. Have a content management plan, aligned with a strategy, that defines and outlines actionable standards and practices to optimize business operations in the A365 SPO environment. Content management considerations should go into how these tools and services are used. When coming up with your plan, think about dos and don'ts for managing content.

Content Management Principles:

- Make products visible
- Make products accessible
- Make products understandable
- Make products reliable
- Support data interoperability
- Be responsive to Soldiers

Content Management Principles

Do keep in mind content management principles when considering how to manage content. Overthinking can make things too technical, and when things get overly technical the user experience often suffers. When considering content, consider your users' knowledge -- how they will search for and interact with content. Ask yourself these questions: What will they access most? How easy is it to access that content? What are priority items you want them to know about? What are the established naming conventions? Ultimately, we want to make sure we are not burying content beneath a pile of folder names that aren't intuitive to your target user.

Make products visible by maintaining information that is searchable. Rely on metadata, rather than on folders, to organize content by using labeling or tagging of content. Metadata is "data about data" that is assigned to content to either describe the content or give it meaning. Metadata can be managed in a way that makes sense to your organization and make it easier to find what you want.

Make products accessible, but balance this with the need for security of content. Organizations and their Content Managers must clearly define what content can be public facing and what needs to be protected.

Make products understandable by using a user-friendly taxonomy. A taxonomy is a way to organize or classify content for storage and retrieval. In the past, organizations made use of complex folder structures that made finding information difficult and cumbersome. SharePoint Online encourages the use of 'flat' hierarchies making better use of lists and document repositories to locate needed information using metadata, tagging, filters, and search. Organizations should also use common terms to define content categories and follow a standard naming convention.

Content Management Do's:

- Plan a content strategy
- Consider content lifecycle
- Use metadata
- Establish naming convention
- Control permissions
- Review content

Make products reliable by assigning source data to each data asset and enforce its use by all who create files within A365. Source data includes the author or publisher, contributors, date created, and date the asset expires or is no longer valid. Complete source data gives readers confidence in the product's accuracy.

Support data interoperability by determining the level of standardization of data products to support searches by a variety of users. Personnel must be able to access content and be able to obtain access with the search engine they have available.

Be responsive to users by providing secure, Web-enabled access to users regardless of their location and available bandwidth. Categorizing content aids in achieving this principle. Establish metrics to track user behavior, identify trends, and improve service quality. Provide a feedback mechanism to involve users in improving the content management strategy. Examples are periodic surveys, feedback forms, after action reviews, and user engagement³.

Best Practices

Do keep in mind best practices when considering how to manage content. Content, operations, and workflow must be defined and managed in your organization. By planning ahead, you can make use of best practices to design, develop, and implement sound content management practices. By using best practices, you can manage and organize content for what you should do, as opposed to what shouldn't be done.

Consistent Naming Conventions – Establish a set naming standard and ensure that all personnel know it and use it. This may seem like common sense, but it is vital to address. If everyone in the organization is using different conventions to name files, sites, and groups, your data will be disorganized.

Metadata Schema – Metadata tags identify a document with keyword, such as section, date, order number, or other information that help users locate the document easier. It is very important to establish easy to follow guidelines for tagging documents, so your team is consistent.

Content Management Don'ts:

- Misname files so they get lost
- Save same document in several locations
- Email files when already online
- Keep old content just in case it will be needed later

Permissions – TRADOC has confidential data that must be properly secured so it is readily available to authorized users i.e., Personally Identifiable Information (PII) and Controlled Unclassified Information (CUI). Do practice sound security permissions based on user roles. For example, a staff section can have pre-set access rights to documents relating to that specific section. Permissions can also be assigned at the individual level for commanders and department heads.

Content Lifecycle – All content exists within a lifecycle stage. The lifecycle of content should be managed with the intent of reducing clutter on your sites. However, some data may have regulatory requirements for how long that data is stored and disposed of and needs to be reviewed by content managers and data owners. Expiration dates can be set so that A365 automatically removes or archives old content. TRADOC adheres to a four-phase content lifecycle plan:

- Create – During this phase data and content is planned, developed, and/or modified.

- Disseminate – Once content is finalized it is then disseminated to the organization or pertinent personnel. The content is made available in different formats in some cases or posted to digital sites.
- Archive – It should be determined how long data and content will ‘live’ when it is created and how it will be archived or disposed of upon expiration. For digital products this usually involves moving documents to a file share as opposed to storing on SharePoint.
- Disposal – Content that is no longer needed or out of date should be disposed of using authorized methods. First, however, be sure to consider records management requirements.

Inventories and Audits – Do conduct a content inventory and audit to identify and assess all your data. You can then use the results of both to help manage the quality of that content. The quality of content can be determined by tracking how many times it’s been accessed and by gathering user feedback. Keep in mind that some content isn’t accessed much, and it’s simply because it is hidden from users who could use it.

Practicing sound content management is not easy. But just as there are things that you shouldn’t do because it makes it harder, there are things you can do to make it easier. Things you should do include having a roadmap for the way ahead such as an organizational plan or strategy for managing content. You should adhere to content management best practices and when it comes to managing your content, always keep in mind the content management principles. By doing these things, you and your organization will have high quality content that is current, findable, and relevant.

This TRADOC OCKO publication was written by Nathan Truckenbrod. Want to learn more? You can respond to this article or access related articles, blogs, media presentations, and more at

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Notes

1. Hanley, Susan. “Team Site vs. Communication Site - Which One Should I Choose?” Team Site vs. Communication Site - Which one should I choose? | Microsoft Docs, 2021. <https://docs.microsoft.com/en-us/microsoft-365/community/team-site-or-communication-site>.
2. APQC, ed. “What Content Management Is and Best Practices for Success.” Understanding Content Management. APQC, January 24, 2022. <https://www.apqc.org/resource-library/resource/understanding-content-management>.
3. Army Techniques Publication 6-01.1, “Techniques for Effective Knowledge Management”, March 6, 2015.



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