Training and Doctrine Command (TRADOC)

Content Management Course

Transcript

March 17, 2023

Version 1.0

Lesson 1:

Introduction

Have you ever been on a tight deadline and needed to find a document but couldn't? What process did you follow to eventually find what you needed? Did you ask a coworker or maybe a mentor or confidant, or did you plow through your file repositories until you found what you needed? Did you give up and recreate the product you were sure already existed but couldn't find?

How much time did you lose throughout this whole process? How much more efficient could you be if content was easily retrievable, relevant, and up to date? If you have experienced any of these issues or want to make sure no one else deals with any of these issue in the future, then you are in the right place.

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Course Overview

Brought to you by the Office of the Chief Knowledge Officer, Training and Doctrine Command Headquarters, Fort Eustis, Virginia, the content management course is designed to give you a basis for developing an effective content management plan or program.

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Terminal Learning Objective

The terminal learning objective is: **Understand** how to use content management practices to manage your organization's digital libraries with the technologies available through Army 365.

The enabling learning objectives are the basis for the lessons and include:

1. Become familiar with the concepts and principles of content management.
2. Understand how to strategically manage content throughout the content management lifecycle as defined in ATP 6-01.1.
3. Understand how to align and integrate content management practices to help improve mission and organizational effectiveness.
4. Identify content management best practices.

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Course Modules
The course is divided into 4 modules or lessons and should take about two hours to complete.
The four different lessons are:
Lesson 1: Introduction, Course Overview, Terminal Learning Objectives, Course Modules, and Concepts and Principles.

Lesson 2: Strategically Manage Content

Lesson 3: Align and Integrate CM Practices

Lesson 4: Content Management Practices, Additional Training and Resources, and Course Conclusion

Let's begin with the Content Management Concepts and Principles.

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This lesson will help you to:

Become familiar with the concepts and principles of content management.

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What is Content?
Content is recorded information and knowledge.
Content is a business or organization asset.
Content is the creation of business values.

Types of Content
There are many different types of content.
Examples include documents, images, email, videos, blogs.

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Categories of Content:

Developing categories for your content will help determine how content is handled. It is best to determine what categories meet your needs and what if any controls will be put in place for each of those categories. Content is generally categorized as:

1. Non-Controlled Content. Content created for personal use and does not require review, approval, or controlled distribution.
2. Controlled Content. Content meant for non-personal use and generally requires formal review, approval, and controlled distribution.
3. Managed Content. Critical knowledge that requires tight controls and distribution.

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What is CM?

ATP 6-01.1, Draft 2022 states that Content Management is the application of a structural process to create, organize, apply, transfer, and archive knowledge and information products within a collaborative environment or records repository. Content management problems are among the most frequent problems that organizations encounter.

TechTarget.com, a technology vendor, defines Content Management as, "the process for collection, delivery, retrieval, governance, and overall management of information in any format. The term is typically used in reference to administration of the digital content lifecycle, from creation to permanent storage or deletion."

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Content Lifecycle

Reference ATP 6-01.1 Appendix D, Table D-1, Content Management Table for more information on the content lifecycle

1. Create

Knowledge products move through several stages during their lifecycle. Initially, one or more authors create a knowledge product. Over time others change that product's content. The create stage consists of the intake of the content which includes how it is acquired and captured in the repository.

2. Organize

Organizing includes naming, labeling, and identifying:

Labeling assigns files a metadata tag. A non-hierarchical keyword or term is assigned to a piece of information based on the use, creation, and knowledge characteristics of files and products.

The disposition of electronic records is determined as early as possible in the life cycle of the knowledge process (preserve information contained in any organizational information system, e-mail, command-specific systems, and systems maintained in an organizational office environment as specified in AR 25-1 and AR 25-400-2).

3. Apply

Making content accessible by applying knowledge management strategies and enabling knowledge flow is the primary purpose of content management. These content management tasks focus on the ability to publish content to a repository and support access to it by anyone who needs to use it. By properly managing content for ease of retrieval by multiple users, content management further allows collaboration.

4. Transfer

Transferring relevant information to those who need it is made easier when applying standard taxonomy and metadata tags. Repositories should have enhanced search and retrieval functions that work for everyone, including those beyond the immediate unit. It organizes this content in a repository that allows effective and efficient transfer of knowledge.

Archiving consists of moving outdated and irrelevant knowledge from active status to an inactive status based on rules, policies, and AR 25-400-2. Moving content no longer relevant and archiving it keeps it separate from current knowledge products.

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Why you need CM

- **Content Management Tasks:**
  - 150-000-0401 *Develop a Content Management Plan (Individual)*
  - 71-8-7656 *Implement a Content Management Plan (Collective)*
- **From ATP 6-01.1:**
  - Knowledge management responsibilities common to all staff members include:
    - Establishing and enforcing content management in their staff section.
    - section.

Some other reasons include:

1. You are having problems with knowledge flow and content performance. For example, content isn't getting into the hands of the right people, at the right time.

2. You want to get rid of Redundant, Obsolete, and Trivial, known as ROT from your knowledge base. Redundant is duplicative material, and Obsolete is content that is outdated or no longer applicable, and trivial is content that is neither valuable nor necessary. Dealing with ROT wastes time and other resources and makes processes and workflows bloated and inefficient.

3. You want to redesign or revamp a site. Maybe you need to redesign a SharePoint Online site, or website, and aren't sure what content needs to make the move or how to organize that content.

4.You need to migrate content such as moving to a new technological platform. For example, you are moving to A365 and need to migrate away from organizational file shares to One Drive.

A report from marketing research firm Wakefield Research and data analysts Elastic found that 54% of U.S. office professionals report wasting time searching for much needed files in cluttered online filing systems.

When put in the hot seat, 81% of office pros cannot find an important document and 31% struggle to find documents they need during a tense moment at work.

Like other large scale technological change, A365 presents an opportunity to break out of our bureaucratic inertia and reinvigorate how we achieve the CM Principles. **-**We can make the way we do business better for ourselves and our teams by reimagining processes and leveraging these new capabilities!
Like other large scale technological change, A365 presents an opportunity to break out of our bureaucratic inertia and reinvigorate how we achieve the CM Principles. ***-We can make the way we do business better for ourselves and our teams by reimagining processes and leveraging these new capabilities!***

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Key Terms

Some key terms that will be used or referenced throughout this training. Some of which may be completely foreign, so we will go into more detail with those. The first three, repository, metric, and evolutionary life cycle, are fairly straightforward.

Repository: a repository is a central place or known location where data is stored and maintained. It does not necessarily have to be a single location, but it provides access to all data. Before computers were developed, repositories were file cabinets or desks.

Metric: a metric is a shorthand term for a parameter or measure for quantitative and periodic assessment of a process. Assessments can be either direct or indirect. Direct assessments measure the actual metrics. Indirect assessments measure indicators. The most important characteristic of a knowledge management metric is whether it can tell how effectively the knowledge is contributing to understanding and decision-making. A secondary one is whether knowledge is being shared or used. On the technical side, metrics can be developed to analyze server usage and data flow.

Life Cycle: the life cycle describes the posting, dissemination, and archiving of knowledge. All knowledge goes through a life cycle similar to the following: placing knowledge so people can use it, disseminating knowledge to those who need it, archiving knowledge for future reference, and destroying or removing knowledge products when they no longer apply.

The next four terms, naming convention, versioning, taxonomy, and metadata, we'll cover in more detail.

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A **Naming Convention:** is a framework used for naming files. Naming conventions should be simple, structured, descriptive, and avoid the use of spaces. The key is to be consistent.

Some different types of naming conventions include:

Camel Case:
The first word is all lower case. The first letter of every word that follows is capitalized, while the rest of the word is in small letters.

Snake Case:
Use an underscore to separate words.

Kebab Case:
Similar to Snake Case but you use a hyphen to separate words.

Pascal Case:
The first letter of all words is capitalized, including the first word.

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Next, we have **Versioning -**version control is the process by which different drafts of a document or file are managed. Versioning can be divided into Major and Minor, where the former represents significant changes, and the latter represents smaller changes.

Some benefits of versioning:
It provides a systematic and consistent approach known and used by all,
It provides clear audit trail of a document,
And it allows for deletion of draft documents with confidence.

Don't just put versions in the name of the file title, also put it in the document title page, and header/footer if one exists. Another method is to use a version control table that's updated every time a group of significant changes are made.
Once a document has been approved, mark it as final and read only.

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Taxonomy: a taxonomy is a system of describing, categorizing, and naming data, and placing it in categories to allow retrieval by users. It is a guiding structure or framework that organizes knowledge into meaningful groups while establishing contextual relationships between them. The most common methods of arranging the data are by subject or format. Taxonomy may be thought of as a table of contents.

The purpose of a taxonomy includes findability, storage and retrieval, and layout and navigation. The two most common types of taxonomy are hierarchal and faceted. A hierarchal taxonomy is set based on relationships with a parent at the top and children beneath, which is usually from the most general subject to the most specific. Think of a military organizational structure where you must go through each level to get to the desired unit or specialty.

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A faceted taxonomy allows for user interaction with content based on subjects, names, features, and attributes and not just top down. The advantage of a faceted taxonomy is that instead of determining where a document should go based on where it fits in the hierarchy, it is filed based on its description or use. The disadvantage is that a complete inventory of your content must be completed first to determine what facets apply.

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While a taxonomy is generally thought of as a hierarchy or list of constrained terms, the American Productivity & Quality Center (APQC) extends the concept to include the rules and guidelines for content management and control.

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And finally, **Metadata** is generally defined as "data about data." In content management, it is structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use, or manage an information resource. Information resources include documents, images, video, audio, links and other information or knowledge products.

Metadata is applied or automatically generated for or attached to each piece of content. Metadata or metatags makes for refined, highly organized and maximized search capabilities.

The term taxonomy often refers to the structure into which content is placed as well as the metadata elements and vocabularies created for metatagging content. Within the A365 environment, using the library feature in a SharePoint site, you can create or add columns which contain the taxonomy and metadata for your filing system.

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It is possible to make the information for these columns mandatory and they can be configured to be user identified or you can apply a list of choices for each one.

A Metadata Model is a representation of an existing or proposed metadata structure which can be applied to all content. Developing a metadata model will help creators and users organize and find content within any given repository.

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One last example before we move on to the Principles of Content Management. Have you ever tried to find something on the Amazon website without using the search function? Try going to the menu and then the "Shop By Department" section to drill down to the item you want. Let's look for a table lamp.

Start by selecting the Home, Garden & Tools tab under the Shop by Department section of the main menu.

The next level has an option for Lighting, but nothing for lamps. Select lighting and see where that takes you.

Now you should see different lighting products with more menus on the left. One of those is Lamps, Bases & Shades, select that option.

At least now you are looking at lamps. However, there are over 10,000 results. How do you reduce that number? Well, you can filter on different things like ratings, price, Prime, and brand name.

This is an example of both taxonomy and metadata being applied to the items Amazon sells through its website. You may find it cumbersome to go through the different levels just to find a single item, but that is how a strict hierarchal taxonomy will work for your intended users. It is important to keep the user in mind when developing your taxonomy and metadata structure for your content management plan.

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Principles

The six principles of content management are visible, accessible, understandable, interoperable, reliable, and responsive. Each of these can be thought of as goals or objectives for a content management plan. Let's go over what each of these principles entail.

Visible:

Establish a repository where cleared users have access to knowledge products. Create and maintain data asset catalogs that are searchable by user friendly applications. Make sure the information is easy to find regardless of where it is stored. Do not bury information where users have to search randomly for it.

Accessible:

Balance accessibility with providing security. An area that provides security allows access to those who need the information. User roles and data asset categorization, dissemination controls, and rights ensure proper access. Protect the repository behind a log-in firewall instead of posting information to a public site.

Understandable:

Structure taxonomy for shared knowledge that makes sense to everyone. Users will not take the time to search through a site they do not understand. Employ common terms when determining product categories. Use doctrinal language. Make sure the taxonomy is easy to read so users can get the information they need. If users determine the instructions for using the product as too complicated, they will not use it.

Interoperable:

Determine the level of standardization of knowledge products required to support searches by a variety of users. Users must be able to access knowledge products. Units should be able to obtain access with the search engine they have available.

Reliable:

The repository should provide secure storage while allowing access by authorized users. Assign source data to each data asset in the repository. Source data includes the author or publisher, contributors, date created, and date the asset expires or is no longer valid. Also, assign a security classification, dissemination controls, and rights (privacy, intellectual property, and copyright) to each data asset in the repository. Do not post copyrighted materials.

Responsive:

Allow users to search, discover, and retrieve data assets no matter where the repositories are physically located. Establish metrics to track user behavior, identify trends, and improve service quality. Develop means to monitor how and to what extent knowledge is being transferred. For example, include the number of users, feedback, and participation in discussions.

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Lesson Summary

The objective of this lesson was for you to become familiar with the concepts and principles of content management.

Topics discussed were:

What is Content?

Content is recorded information and knowledge, is a business or organization asset, and there are many different types, including documents and videos.

What is Content Management?

Content management is the process for collection, delivery, retrieval, governance, and overall management of information in any format. Content is generally categorized as uncontrolled, controlled, and managed and the four phases of the content life cycle of content are: create, organize, apply, and transfer. Content management is the key to improving the transfer of knowledge.

There were several key terms related to content management in this lesson including, repository, naming convention, versioning, taxonomy, and metadata. Remember that the term taxonomy often refers to the structure into which content is placed as well as the metadata elements and vocabularies created for metatagging content.

And finally, the six principles of content management are visible, accessible, understandable, interoperable, reliable, and responsive and are found in ATP 6-01.1, Appendix D.

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After completing this lesson, you should be able to:

Lesson 2:
Understand how to strategically manage content throughout the content management lifecycle as defined in ATP 6-01.1.

Strategy

First, what is a strategy? It is a plan of action to achieve a goal or overall aim. Therefore, a content strategy is a systematic, deliberate plan of action for how to manage content to achieve business aims, objectives, and needs.

What is the goal for content management? Do you remember the content management principles that were introduced in the last lesson? They are visible, accessible, understandable, interoperable, reliable, and responsive. As was mentioned, each of these can be thought of as goals for your content strategy.

It is important to understand that an effective strategy allows for collaboration on content creation throughout and across sections, units, and organizations. It also maintains a structural efficiency using consistent taxonomies and metadata throughout all digital platforms. This is where you look at what is known as the components of Knowledge Management: people, processes, tools, and organization which is often written or spoken as PPTO.

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People are those who create, organize, apply, and transfer knowledge and the leaders who act on that knowledge. As you can see, people move content through its lifecycle and you need to consider who does it, when they do it, and how they do it when developing your strategy.

Processes include activities that are integrated into operations. Are there established processes for managing content? Will they meet the needs of your program strategy, or do they need to be adjusted? Additionally, you should understand what process not only create content, but use the content after it is finalized and published so that information is effectively shared where and when needed.

Tools can be anything that is used to share and preserve knowledge. Most people immediately think of digital tools, and we will be covering quite a few throughout this course, but a tool can be something as simple as a dry erase board or chalk board. Who has been to a restaurant where the daily special is presented in this way? When developing your strategy, you need to determine what tools you have access to and how, if at all, they will be used to manage your content.

Organization is described as the matrix in which people, processes, and tools function to integrate individual and organizational learning strategies. The culture of your organization should be considered when developing your content management strategy. How is information created, edited, stored, and edited now versus what should be or needs to be done? Determine what policies or procedures are in place that affect how content is managed? Will the structure of the organization affect which resources are available for use?

All the components will have an effect on how content is managed, so looking at them as part of your strategy will help to make it as effective as possible.

Once you set the goals and develop the strategy for managing content, how do you refine your content management plan? To effectively implement a content management plan, you first must take an inventory of all your content. Then you audit that content to complete the picture of what you have, where it is located or will be stored, what category each item falls into (controlled, managed, etc.), who or where content comes from, and who uses it.

All these things will help you determine the best taxonomy and metadata to apply to your content and better organize it as it travels through the lifecycle steps of create, organize, apply, and transfer. Next, you establish governance for managing content, and then follow up with compliance periodically to ensure your strategy is meeting your goals.

With the first step, taking inventory, being so important, let's discuss it in more detail.

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Inventory

What is meant by content inventory?

1. A content inventory is a detailed representation of content, often in the form of a spreadsheet. It can be created manually by copying and pasting or by using an automated tool.
2. A content Inventory tool is generally a spreadsheet where each row represents a file or group of files or digital assets (images, video, etc.), documents, metadata such as keywords, and other useful information for managing your content.
3. A full inventory includes grouped information such as document name, file information (file type, file size), links to the document, dates (created date, modified date, last viewed date), keywords for tags and search optimization, and metrics such as number of times viewed, etc.
4. It is important to inventory each repository to get an accurate picture of where different content is stored and how it is used as you move forward.
5. Doing an inventory will help you identify critical assets and what content needs to be managed, controlled, or can be uncontrolled (category).

Some other things to capture during your inventory are:

1. Where is content currently stored and where should it be stored?

2. What types of content do you have?
3. What are the sources of content (whom or what processes create content)?
4. What are the needs and potential uses/users?
5. And, Metrics such as views, downloads, etcetera.

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If you wish to use the OCKO Inventory Template (part of it is shown here) from the OCKO SharePoint page, be sure to customize it to meet your needs. https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-OCKO/SitePages/Home.aspx

1. The columns are color coded with green being for file description, yellow for relevant file dates, blue for file ownership and access, and so on.

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2. Other sections of the tool capture things like performance analytics, and migrations status.
3. For a complete description of the tool and how to use it see the Content Inventory & Audit Template Users Guide at APQC.org.

After completing the inventory, it is time to begin the audit, where you determine things like content quality, effectiveness, relevance, consistency, navigation, and content workflow.

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Audit

After you inventory content, you need to audit or assess it.

An audit examines, assesses, and evaluates the quality of the content listed in the inventory. Audits uncover content that needs updating, where gaps exist that new content could fill, and if certain pieces of content are ready for removal. In deciding how to audit your content, scope it by considering your goals and criteria to manage it through the four phases of the content life cycle.

Before you begin your audit, you need to settle on your audit goals and scope. Goals are your reason for doing the audit. Example goals might be to reduce redundant content, identify gaps in content, or improve the user experience with content. Scoping your audit requires you to determine if you are auditing all or just some of your content. Everyone involved in the audit should have a shared understanding of the goals and scope.

An audit should consider: the content itself, how content is structured, and the user experience including functionality.

The tool from APQC (shown here) has a tab for all the content audited, and separate tabs for each source or repository. The final tab is an example of how the tool is filled out to complete your audit.

This approach is often called a bottom-up approach, where bottom-up refers to starting with the content and following it back to who or what process created it.

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If you wish to complete a top-down or middle-out approach, starting with the controls and working down to the content, then you would use something like the content catalog shown here.

The Content Catalog can be used to do a summary level content inventory and it helps define each step of the content life cycle and identifies controls for the content (think management guidelines applied to the inventory versus a straight inventory).

The columns identify, refine, deliver, and use are APQCs version of the content life cycle and relate to the create, organize, apply, and transfer we mentioned earlier.

You've completed your inventory and audit, so now what? Now you use that information to refine your taxonomy and metadata schema, any naming conventions, and controls for the content moving forward. This is typically done with developing Standard Operating Procedures (SOPs) or Tactics, Techniques, and Procedures (TTPs).

Keep in mind your goals or end state is in doing the audit. While the focus of this training is the basics of doing an audit, see the Resources slide at the end of this training for additional resources on tools and techniques for focusing your assessments to ensure your goals are achieved.

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Develop SOPs

Your SOP or TTP could encompass all your content and the many repositories, or you could make one for each repository, or even develop them for each process that creates content. Choose whichever method works for your situation and organization.

You may be thinking what is included in the SOP?

The inventory and audit tools shown earlier provided much of the information that will guide you as you move forward, like what controls need to be put in place for each item in your inventory and what taxonomy and metadata is necessary for easily identifying and retrieving content. Additionally, your SOP should define roles, responsibilities, a review schedule, and a process for archiving or removing content.

We mentioned periodic reviews, but for what purpose? Of course, you are probably thinking to make sure the controls are being followed and content is being handled and stored correctly, but there is another reason for a review. That reason is to review the metrics relevant to your content.

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Review and Metrics

Why metrics you ask? How do you determine if your content management plan is effective? Is it because everything is filed with the correct naming convention, taxonomy, and metadata and is in the correct repository? Sure, that is part of it, but why do you have content in the first place?

If you said, "to use it" you would be correct. Gathering and evaluating metrics for the content will help you improve how content is organized, applied, and transferred. Metrics help you audit for content effectiveness.

Metrics can vary depending on the content type. Analytics tailored to the content type should be captured whenever possible. For instance, you may capture customer satisfaction metrics with external multimedia content but not for most internal documents.

Some examples of the different types of metrics you can use are quantitative, vanity, satisfaction, and engagement.

Quantitative metrics are represented numerically and could represent the number of times content was accessed or downloaded.

Vanity metrics would be how many times or how often a repository is visited. It may include repeat visits by a user if the capability exists to capture it.

Satisfaction metrics are derived from surveys. Some potential questions could be:

1. How useful do you find the content management system?
2. Do you have difficulty finding what you need?
3. Do you have ideas for making things better that you would like to share?

Engagement metrics are numeric and represent the number of pages, files, tables, etc. a user goes through on each visit. Maybe you can determine how many clicks it takes to get to the desired content. This will indicate how effectively your content management is meeting the needs of your user base.

It is important to establish a review process to not only ensure content is stored in the right way, and the right place, but that the controls that are in place lead to the user's ability to retrieve needed content.

That is the end of the lesson. What did you take away from the material we covered? Do you remember all the topics? Let's review.

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Lesson Summary

The objective of this lesson was to understand how to strategically manage content throughout the content management lifecycle as defined in ATP 6-01.1.

The topics covered were:

1. Strategy

A content strategy is a systematic, deliberate plan of action for how to manage content to achieve business aims, objectives, and needs.

2. Inventory

A content inventory is a detailed representation of content, often in the form of a spreadsheet.

A full inventory includes grouped information such as: document name, file information (file type, file size), links to the document, dates (created date, modified dates, last viewed date), keywords for tags and search optimization, and metrics such as number of times viewed, etcetera.

It is important to inventory each repository separately to get an accurate picture of where different content is stored and how it is used as you move forward.

3. Audit

Audit should consider: the content itself, how content is structured, and the user experience including functionality.

Bottom-up approach refers to starting with the content and following it back to who or what process created it. A Top-down or middle-out approach starts with the content controls and works down to the content.

The audit informs your taxonomy and metadata schema, any naming conventions, and controls for the content moving forward.

The audit should have a purpose or a business goal or goals.

4. SOPs

Your SOP could encompass all your content and the many repositories, or you could make one for each repository, or even develop them for each a process that creates content.

SOPs should define roles, responsibilities, a review schedule, and process for archiving or removing content.

5. Metrics

Gathering and evaluating metrics for the content will help you improve how content is organized, applied, and transferred. Use metrics to audit for content effectiveness.

Metrics can vary depending on the content type. Analytics tailored to the content type should be captured whenever possible. Future audits will often incorporate metrics to shape the scope, goals, and actions for improving content.

Some examples of the different types of metrics you can use are quantitative, vanity, satisfaction, and engagement.

Select Lesson 3 to continue learning about content management.

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After completing this lesson, you should be able to:

Lesson 3:
Understand how to align and integrate content management practices to help improve mission and organizational effectiveness.

A365 and MS SharePoint Online provide many opportunities to improve or enhance content management by providing improved search features, offering integrated work services, application creation using PowerApps, developing visualizations using MS Power BI, organizing projects using MS Planner, and improving collaboration capabilities through MS Teams.

Content management now must encompass more than just managing a document filing system. It must account for all the digital information produced using any of the tools offered through A365.

Let's look at some ways A365 and MS SharePoint Online help with business processes and content management.

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A365 and SPO

Content Integration. MS SharePoint Online brings content together by integrating across applications, services, and platforms. Some examples of technologies working together include:

1. Automation and streamlining of workflows by integrating MS Power Apps and MS Power Automate with MS SharePoint Online. This allows for automated document flows, approval processes, and much more.
2. Graphically display metrics with MS Power BI.
3. Boost collaboration and communication over content by integrating MS Teams with standalone apps, collaboration apps, and SharePoint pages.
4. Seamlessly work content by integrating MS Office with MS Teams and other applications.

Content Findability. Make finding content easier by tagging it and leveraging search capabilities using advanced AI.

1. Integrating taxonomy and metadata for organization, retrieval, and navigation versus the old folder system.
2. MS SharePoint Online has Document ID which is a feature that assigns each document uploaded to a site a unique ID (and a permanent URL) that can be used for sharing and retrieval. No more losing a document because someone moved it to another folder.

Content Governance. Proactively apply governance using policies with document retention and sensitivity labels.

1. Set controls for ownership and access so the right users have the capabilities needed to utilize managed content.
2. Automate redundant processes, leaving more time to complete other tasks.
3. Set-up notifications like "ready for approval," "document review due," or "changes were made to your content" so the right people automatically get the right information in a timely manner.

MS SharePoint Online is an extensible platform that can be customized and extended using the SharePoint framework, available apps, and webparts to improve the capabilities and functionality of content management. When creating a MS SharePoint Online site, you can choose either a communication site or a MS Teams site. One significant difference is that a communication site has limited content owners, and on a MS Teams site everyone is a content owner. Throughout this lesson, the use of MS SharePoint Online refers to a communication site and MS Teams refers to either the desktop or online application.

A365 has so many features that it is impossible to include everything in one lesson. However, regarding content management there are some things to keep in mind when developing your governance and integrating content management into your daily operations.

We will start with MS Teams and move through some other features, only touching on some high points.

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MS Teams

MS Teams is for individual and group collaboration on working products. It is a working environment and is not meant to be a repository for finished products. This is the space where the digital sausage is made using the collaborative process.

MS Teams needs to be part of the governance related to content management so that the process utilized for final documents transfers out of the working environment correctly. Without internal controls, it can become a dumping ground for documents much like the old share drive.

Our next feature is called Communication Sites.

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Communication Sites

First, what is a communication site? Typically, it is a website where information (final products) is shared or displayed and is traditionally managed by either a content manager or site administrator.

Communications sites are used to make finished content widely available. They should be used for storage and distribution of final products and the broadcast of information.

1. Ensure your content management plan includes periodic reviews so that content is current and relevant.

2. Do not let your content become outdated or the communication site will no longer be useful and may even hinder productivity.

Another feature of A365 is Workflows. Workflows are part of the MS Power Platform and provide many advantages.

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Workflows

MS Power Platform is a collection of tools to simplify gathering, processing, and reporting content. The main tools of the Power Platform include MS Power Bi, MS Power Apps, and MS Power Automate.

1. MS Power BI is a collection of services, apps, and connectors used to perform advanced analysis and build advanced content visualizations and insights.
2. MS Power Apps is a suite of services, apps, and connectors. as well as a data platform, that provides a rapid development environment to build custom apps to automate processes that would otherwise be paper driven.
3. MS Power Automate (formerly MS Flow) is used to trigger business processes and create automated workflows.

All of which either generate, become, or manipulate content. Content management plans need to account for the products generated using the MS Power Platform to make the resources available to those who need them. As these applications become more integrated into daily activities, your content management plan needs to keep up with the changing environment.

Communication sites were already mentioned, but another form of information sharing, and a powerful tool when utilized correctly, is social media.

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Social Media

Social media is governed by DODI 5400.17. Be sure to check for governance at echelon before making social media part of your communications plan.

1. DoD Instructions 5400.17 establishes six Social Media Principles:
    a. Governance,
    b. Professionalism,
    c. Proprietary,
    d. Acumen,
    e. Establishment Need, and
    f. Transparency.

2. From the principle of professionalism: “All official social media content is a reflection of the Department. When posting to official social media accounts, content should meet well-defined, appropriate objectives. Public Affairs Officers will remain respectful, responsive, and genuine, and exercise the same high standard of professional and ethical behavior on social media accounts as they do during any other function or on any other platform. Content should inspire and engage with audiences. At no time, however, should such content undermine the Department’s efforts to remain a good steward of the public trust. No content will be released that could be reasonably construed as offensive, inappropriate, or unbecoming…” -**DoD Instruction 5400.17, January 24, 2023.**
3. To learn more about the Social Media principles refer to the DODI.
4. As you know, everything is forever on the internet, so good content management governance and enforcement will enable your organization to effectively use social media to advance their communication objectives.

The last feature we will cover, which will not be completely new, is email.

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Email

What is different about MS Outlook Online than previous versions? For starters, mailbox sizes have increased significantly. Gone are the days of setting up a .pst file and then not having access to important information when logging in remotely. With this change comes some other hazards that need to be addressed in your content management governance.

Remember: email should be used for communication and not collaboration. We already covered there are applications or tools more suited for this purpose.

What does this mean?

1. No more routing documents through email for approval.
2. No more gathering individual input through email and then attempting to compile them into a single, up to date document.
3. Easier version control using other collaboration tools.

Then why are we discussing email if it isn’t used for those things anymore?

Your SOP or TTP needs to establish procedures for utilizing email, so everyone understands the migration of familiar, and quite frankly, outdated actions to new applications or tools.

Here are some things to consider:

1. Learn how to create relevant MS Outlook groups and leverage them when developing teams in MS Teams and MS SharePoint Online sites, to improve collaboration, information sharing, and control of relevant content.
2. Create a system for organizing content such as creating folders and/or using categories as content labels. Or maybe use categories to quickly assign colors to certain emails, then quickly sort and review all messages in that color group.
3. Organize and act on emails by setting rules. Create conditions based on message content, then create actions such as alerts that the content was received or actions that move the message to a particular folder.

Creating a standard for email and including it in your content management plan will provide a baseline for everyone in your organization to work from and improve the effectiveness of the platform as a communication tool.

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Lesson Summary

We have come to the end of the lesson.

The objective was to understand how to align and integrate content management practices to help improve mission and organizational effectiveness.

The topics covered were:

1. A365 and MS SharePoint Online

A365 and MS SharePoint Online provide many opportunities to improve or enhance content management by providing improved search features for finding content and offering integrated work services that improve content integration and the application of content governance.

2. MS Teams

This is where collaboration happens and is not a repository for finished products. Do not let Teams become the file dumping ground.

3. Communication Sites

Communications sites are used to make finished content widely available and require regular reviews to ensure content is accurate and relevant.

4. Workflows

MS Power Platform has MS Power BI, MS Power Apps, and MS Power Automate and can generate or manipulate content so be sure to include them in you content management plan.

5. Social Media

Social media is a powerful tool that has significant governance and must be effectively managed. Ensuring content is accurate and relevant are some keys to making keeping it useful.

6. Email

Email should no longer be used for collaboration or file sharing, but still needs standards to reduce the amount of time spent reading and responding that could be utilized for completing work tasks.

The next lesson will provide some best practices to help inform content management SOPs or TTPs and improve efficiencies for many of the applications offered in A365.

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After completing this lesson, you should be able to:

Lesson 4:
Identify content management best practices.

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CM

1. Create SOPs for both content management processes and business processes aligned with content management.
2. Identify internal digital workspace and local practices for working and drafting content (for example, a MS Teams Site or channel).
3. Establish a digital knowledge repository or resource center for storage and retrieval of final products (for example, Communications Site).
4. Identify sub processes for Content Contributors to submit final content for review before posting.
5. Establish processes or automated workflows for keeping content fresh to include updating and retiring content.
6. Identify a Content Manager whose responsibility it is to review submitted content to ensure content quality, adherence to requirements and best practices, and avoid duplication.

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MS Teams

1. Use Naming Conventions for your Teams. TRADOC has standards!
2. Use Naming Conventions for your Channels.
3. Use channels to focus work and discussion on specific projects, subjects, and content.
4. Use likes and reactions to indicate agreement or that you have actioned a task. This is different from social media where the same reaction may indicate approval.
5. Emphasize capitalizing on the User Experience. Work in other apps and A365 services, all from within the Teams environment.

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Communication Sites

1. Plan your site. Don't leave it up to chance!
2. Put the User Experience first. Optimizing the User Experience should drive design.
3. Manage access to provide security, compliance, standardization, and accountability.
4. Regularly review content. Content should be fresh, relevant, and non-duplicative.
5. Make your text "scannable" with bulleted lists and short sentences.
6. Promote frequently needed content. Make sure what readers need most is easy to find.

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Workflows

1. MS Power BI
   a. Employ effective visuals by selecting the visual that best fits the data.
   b. Limit the number of visuals in dashboards and reports. Using a large number of visuals can be overwhelming for the viewer and slows report performance.
   c. Use templates (.PBIT files) to speed up and standardize report development.
   d. Use tooltips to provide additional information on visuals and metrics.
   e. Give report objects names that are meaningful to users to avoid ambiguity and confusion.
   f. Practice good security. Employ Row Level Security to restrict row content to users based on their role.

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2. MS Power Apps
    a. Put the User Experience first. Optimizing the User Experience should drive design.
    b. Use standard naming conventions for objectives. This eases the maintenance burden.
    c. Change default names. Default names are inherently general, usually ambiguous, and often confusing.

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3. MS Power Automate
    a. Use a Naming Convention when naming Flows.
    b. Label every action. Don't settle for the default name for actions.
    c. Add a Comment to every action. This helps the next person understand the purpose of the action.
    d. Provide a flow description. This will help the next person understand the purpose of the flow.

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Social Media

1. Know your audience. Know what demographic or segment of the population the message is intended to reach.
2. Tailor your message. Tailor the message you want to convey to that audience.
3. Develop a consistent brand and image. Have a consistent visual style, tone, and voice to remain recognizable to your audience.
4. Schedule content in advance. Have a pipeline of fresh content to keep viewers interested and coming back.
5. Post and optimize content for different platforms. Consider tailoring your content to be distributed across multiple, different channels.
6. Respond to feedback. Be responsive to replies about the content you are posting.
7. Be ready in a crisis. Be prepared to immediately remove your content in the event of an emergency.
8. Adhere to the approval process. Don't post and then ask for forgiveness.

Army Social Media Policies and Resources
https://www.army.mil/socialmedia/?from=st3

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Email

1. Use email for communication. It's not designed for collaboration.
2. Email isn't a repository for enduring knowledge. If a person retires or moves on, what's in their email is often lost.
3. Regularly clean boxes. It makes finding relevant content easier.
4. Regularly scrub mailing lists. The only thing worse than getting email you shouldn't get is not getting email that you should get.
5. Write compelling and consistent subject lines. Recipients need to quickly know the subject and the urgency.
6. Develop a standard for email subjects. Recipients will appreciate the order and consistency.

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MS One Drive

1. Use file and folder naming conventions. Be consistent. Be organized.
2. Do not build folder structures more than 3 levels deep. Don't bury your content so deep that no one can dig it up.
3. Share links to files from One Drive instead of sending the actual documents to reduce workload with making updates. Files can be edited virtually and by more than one person at a time, which keeps the original up to date and does not require manual consolidation.

Incorporating known best practices at the organizational and personal level will increase the chances of maintaining a successful content management plan.

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Lesson Summary

The objective of this lesson was to identify content management best practices. Best practices were covered for each of the following areas:

1. Content Management
    a. Which included creating SOPs, digital repositories, and to automate processes when able.

2. MS Teams
    a. Which included using naming conventions for each team and channel, and to focus on specific projects, subjects, and content.
3. Communication Sites
    a. Which included panning your site and to regularly review the content for accuracy and relevancy.
4. Workflows including
    a. MS Power BI,
    b. MS Power Apps, and
    c. MS Power Automate
    d. Some best practices included limiting the number of visuals in dashboards and reports when using Power BI, using standard naming conventions for Power Apps and Power Automate, and to provide descriptions of each flow.
5. Social Media
    a. Best practices included knowing your audience and tailoring your message as well as being prepared to quickly respond to an emergent need to take down content.
6. Email
    a. Which covered using email for communication, not collaboration and developing a standard for subject lines, and finally,
7. MS One Drive
    a. Which included using naming conventions and not using more than three levels of folders.

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Additional Training and Resources

1. Records Management
    a. AR 25-400-2: https://armypubs.army.mil/epubs/DR_pubs/DR_a/ARN31479-AR_25-400-2-000-WEB-1.pdf
    b. Reference HQDA SPO Governance passages on Records Retention Policy and Site Retention Policy: https://armyeitaas.sharepoint-mil.us/:b:/r/sites/spo_coe/Governance/OfficialGovernanceChangeLogsAndDrafts/SharePointGovernance3.10.pdf?csf=1&web=1&e=gCkpRM

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2. Information Security
    a. All individuals should practice INFOSEC.

i. Do not post content from SIPR or classified media.
ii. Personally Identifiable Information must be protected.

b. All DoD personnel are responsible for compliance with the DoD Information Security Policy. This includes meeting requirements for designation, marking, protection, and dissemination of controlled unclassified information (CUI) and classified information.
c. DOD Information Security Policy: DoD Issuance 5200.01, DoD INFOSEC Program and Protection of SCI https://www.dodcui.mil/Portals/109/Documents/Policy%20Docs/DoDI%205200.01%20DoD%20INFOSEC%20Program%20&%20Prot.%20of%20SCI.pdf DoD Manual 5200.01, Volume 1, DoD INFOSEC Program: Overview, Classification, and Declassification.

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3. CM Training Sites
   a. The TRADOC and HQDA SPO Governance provide required and recommended training for the different MS SharePoint Online roles. HQDA SPO governance draft: https://armyeitaas.sharepoint-mil.us/sites/spo_coe/Governance/OfficialGovernanceChangeLogsAndDrafts/SharePointGovernance3.10.pdf?CT=1676560313025&OR=ItemsView
   b. Army KM Basics Course through the milUniversity: https://www.milsuite.mil/university/army-knowledge-management-class/courses/knowledge-management-representative-course-phase-i/
   c. Articles from the U.S. Army TRADOC Office of the Chief Knowledge Officer: https://www.tradoc.army.mil/ocko/#articles
   d. KM Training Site through the U.S. Army TRADOC Office of the Chief Knowledge Officer: https://tradoc.army.mil/ocko/training-portal/
   e. American Productivity and Quality Center (APQC) Resources which is accessible with a .mil account: https://www.apqc.org/

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4. A365 Training
   a. A365 Training Hub https://armyeitaas.sharepoint-mil.us/
   b. Udemy https://armyciv.udemy.com/?next=%2Forganization%2Fonboarding%2F
   c. Army eLearning https://usarmy.percipio.com/login?state=%2F#/
   d. MS Online Training https://support.microsoft.com/en-us/training
   e. MS 365 Community Content: https://learn.microsoft.com/en-us/microsoft-365/community/

f. DoD Mandatory Controlled Unclassified Information (CUI) Training https://securityawareness.usalearning.gov/cui/index.html

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5. Suggested Readings include:
   a. **Content Audits and Inventories: A Handbook**. Paula Ladenburg Land, 2012.
   b. **Metadata for Content Management**. David Diamond, 2016.
   c. **Enterprise Content Strategy: A Project Guide**. Kevin Nichols, 2012.
   d. **The Accidental Taxonomist, Third Edition**. Heather Hedden, 2022.

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Course Review and Summary

Conclusion

Let's do a quick review of what we have covered throughout this course.

- Content is recorded information and knowledge. Content is a business asset.
- There are many types of content. Each with a particular lifecycle, associated analytics, distribution channels, and schemes for organization, categorization, and classification (e.g., taxonomy, metadata).
- You must first inventory your content, then audit it to determine the best taxonomy, metadata schema, naming convention, and controls to meet your business goals and the needs of your organization.
- Develop SOPs or TTPs to standardize and normalize your content management plan.
- Establish periodic reviews and evaluate metrics to continuously improve how you handle content.
- Use the many tools A365 provides to better manage your content.
- Improve your content management plan by incorporating established or known best practices.
- Seek out and utilize the many different training and resources available for content management.

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Course Objective

The terminal learning objective for this course was: **Understand** how to use content management practices to manage your organization's digital libraries with the technologies available through Army 365.

The enabling learning objectives were the basis for the lessons and included:

1. Become familiar with the concepts and principles of content management.

2. Understand how to strategically manage content throughout the content management lifecycle as defined in ATP 6-01.1.
3. Understand how to align and integrate content management practices to help improve mission and organizational effectiveness.
4. Identify content management best practices.

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OCKO POCs

The TRADOC Office of the Chief Knowledge Officer (OCKO) personnel and their contact information is listed on the OCKO SharePoint site.

https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-OCKO/Lists/KMPOCs/TRADOC%20OCKO%20Personnel.aspx

You can also contact us by using the organization email:

usarmy.jble.tradoc.mbx.hq-tradoc-cko@army.mil

Please feel free to reach out with any questions you may have or to request assistance.

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References

This is the list of references either used or referred to throughout this course.

- ATP 6-01.1, Techniques for Effective Knowledge Management, March 2015, https://armypubs.army.mil/epubs/DR_pubs/DR_a/pdf/web/atp6_01x1.pdf
- ATP 6-01.1, Knowledge Management, Draft 2022, unpublished
- AR 25-400-2, Army Records Management Program, October 2022, https://armypubs.army.mil/epubs/DR_pubs/DR_a/ARN31479-AR_25-400-2-000-WEB-1.pdf
- HQDA SharePoint Governance 3.10, Draft, https://armyeitaas.sharepoint-mil.us/sites/spo_coe/Governance/OfficialGovernanceChangeLogsAndDrafts/SharePointGovernance3.10.pdf?CT=1676560313025&OR=ItemsView
- DODI 5200.1, DoD Information Security Program and Protection of Sensitive Compartmented Information (SCI), April 2016, https://www.dodcui.mil/Portals/109/Documents/Policy%20Docs/DoDI%205200.01%20DoD%20INFOSEC%20Program%20&%20Prot.%20of%20SCI.pdf
- Taxonomy development Tool, APQC.org, https://www.APQC.org

- Content and Inventory Template, https://armyeitaas.sharepoint-mil.us/sites/TR-HQ-OCKO/SitePages/Home.aspx
- Content Audit Template, APQC.org, https://www.APQC.org
- Content Catalog, APQC.org, https://www.APQC.org
- Army Social Media Policies and Resources, https://www.army.mil/socialmedia/?from=st3
- The social economy: Unlocking value and productivity through social technologies, McKinsey.com, July 1, 2012, https://www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/the-social-economy
- Team Site vs. Communication Site: https://learn.microsoft.com/en-us/microsoft-365/community/team-site-or-communication-site

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Thank you for taking the time to complete this course. You may now return to the Course Document and complete the Course Quiz and Survey.