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U.S. ARMY MANEUVER SUPPORT CENTER OF EXCELLENCE
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11 June 2024

ATZT-CSK (5-1a)

MEMORANDUM FOR DISTRIBUTION

SUBJECT: Memorandum of Instruction (MOI) for Knowledge Management (KM) and Army 365 (A365) Usage at MSCoE

1. References:

- a. ATP 6-01.1 KNOWLEDGE MANAGEMENT
- b. Office of the Chief Knowledge Officer (OCKO) Operations Manual.
- c. Office of the Chief Knowledge Officer (OCKO) Content Management Plan.
- d. NETCOM Personally Identifiable Information (PII) Data Breach Standard Operating Procedures (SOP).
- e. A365 SharePoint Online: (Do's & Don'ts for Managing Your Content).

2. Knowledge Management (KM) Overview: The purpose of KM within the Maneuver Support Center of Excellence (MSCoE) is to ensure that appropriate knowledge is effectively disseminated to the right individuals at the crucial time, contributing to the successful accomplishment of the mission. This directive aligns with the guiding principles and framework of the MSCoE KM Strategy, which involves the KM Officer (KMO) and the KM Working Group (KMWG) in critical roles. Our focus spans adherence to established standards, and the utilization of relevant systems, tools, data, and personnel essential for the efficient execution of KM practices. In our commitment to adopting advanced commercial cloud technologies, MSCoE recognizes the pivotal role of cloud technology in the global infrastructure. It provides vital data that strengthens our warfighters and allies, maintaining our technological edge. IT modernization and readiness initiatives are designed to equip our workforce with the tools necessary for adapting to the modern workplace. The Army 365 (A365) suite, integral to our daily operations, exemplifies this modern approach. Through the application of best practices outlined in this document, and with the guidance of the KMO and KMWG, the use of A365 will significantly transform our digital workspace, enhancing our mission readiness. It is essential to acknowledge that information and knowledge are critical enablers in developing a more lethal, resilient, and innovative force in the 21st-century battlefield.

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3. SharePoint Online (SPO): SPO is designated as the comprehensive repository for all current, authoritative, and FINAL versions of TRADOC MSCoE documents and resources. It is essential for the directorate's KM Representative (KMR) to coordinate the process of uploading new content into SPO, ensuring adherence to Records Management Governance and Principles. SPO's enhanced capabilities extend beyond mere document storage; it seamlessly integrates calendars for scheduling and event planning, employs SharePoint lists for efficient organization and tracking of tasks and data, and incorporates advanced workflow enhancements. These features are intricately designed to automate processes, streamline operations, and provide a unified, user-friendly interface that significantly improves access and efficiency across MSCoE's digital environment.

4. Microsoft (MS) Teams: a central element of the A365 suite, is designated for collaborative efforts, specifically in the development and refinement of draft documents. This platform, linking team sites to A365 groups complete with mailboxes and shared calendars, is optimized for collaborative tasks such as file sharing, video conferencing, and interactive chatting, with a primary focus on the collaborative creation and editing of content rather than its long-term storage. Team owners must be a section leader to manage overall team operations and membership, while channel owners are in that section and oversee specific channel management. Additionally, teams content managers ensure compliance with organizational standards, particularly in maintaining information security and adhering to PII/PHI guidelines. A mandatory requirement is each team and channel must have a KMR appointed as an owner. Access to A365 Teams requires an army.mil account, with varying access permissions for public and private teams or channels. The establishment of teams follows a stringent protocol to ensure efficiency and avoid duplication, demanding a clear and enduring purpose, defined audience, and adherence to the 'TR-HQ' naming convention.

5. One Drives: All users will use A365 to create, edit, share, and collaborate products with others. Users are advised to save and back up important files to their personal OneDrive accounts, mainly for work-related data backup and administrative file transfers. Files on OneDrive sync with A365 and are cloud-stored for easy access across devices, with offline edits syncing once reconnected to the network.

6. Document Naming Protocols and Tagging: Each document will be initiated in A365 (usually in Teams) and will include, at a minimum, the following naming protocols and metatag fields which align with A365 Standards (Date (yyyymmdd), Title, Author, Draft or Final version (CBRN Battle

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Rhythm_SSG Smith_Draft or CBRN Battle Rhythm_SSG Smith_Final V1.1), and keywords identifying specific content and topics within the document. Only FINAL versions will be transitioned from Teams to SPO Users will complete all information to properly metadata tag the document (i.e. tags: KM, SOP, MP, EN, ARIMS #, etc.) for ease of search and records management.

7. Folder Naming and Organization: Name folders to reflect the associated office or function for easy navigation (MSCoE_G6_KM Plan), create an 'Archive' folder for non-active items, label sub-folders by position or function (not personal names) for smooth transitions (i.e. Registrar_POC List), except in cases of individual backups, to maintain a well-organized digital filing system.

8. DRAFT documents: Drafts will be stored and used in either OneDrive ("ALL ABOUT ME") or Teams ("ALL ABOUT US- SHARING and COLLABORATING"). DRAFT documents will not be housed in SPO (See bullet 5 for example)

9. File Sharing: Users will not share files internally via email attachments. Instead, users will place files on OneDrive, Teams, or SPO and share the Uniform Resource Locator (URL) link. In Army 365, the transition from sharing files as email attachments to utilizing OneDrive, Teams, or SPO offers significant advantages such as enhanced security through advanced features like permission settings and access controls, efficient collaboration with real-time document editing capabilities, and improved version control for tracking changes and maintaining document integrity. This method also reduces email clutter and circumvents attachment size limits, supporting centralized document management for easier organization and accessibility. Additionally, it ensures operational continuity for military personnel who require mobile access to documents and aids in maintaining compliance with regulations and policies through features like automatic archiving and detailed access logs.

10. PII and HIPPA: Special care should be taken when capturing data on any shared system with multiple user access. Users must be aware of who has access and control this appropriately.

11. Data Cleaning: Biannual System Clean-Up: MSCoE schedules biannual clean-up weeks in spring and fall to organize digital systems. Responsibilities include archiving necessary SharePoint files to One Drives and deleting obsolete files, ensuring a streamlined and efficient digital environment. Clean-up months will be October and April and must be completed by the last day of the month which will be issued by a tasker.

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12. Roles and Responsibilities:

a. The KMO:

(1) Administer the day-to-day operations of KM, safeguard critical organizational knowledge, and consistently deliver KM-related guidance to the Component Commander.

(2) Formulate, disseminate, and enact a KM Plan specific to the component level, engage in or establish a Component-Level KMWG, and devise a KM program customized to the needs of our component.

(3) Craft and implement a tailored KM Plan for the Component's exercises and real-world events, ensuring adherence and effectiveness.

(4) Foster organizational learning and continual improvement within TRADOC MSCoE by promoting efficient knowledge sharing as part of our KM program.

(5) Oversee the selection and training of KMR and initiate KM endeavors aimed at enhancing performance throughout the command. This involves the creation, organization, application, sharing, collaboration, retrieval, use/reuse, and transfer of knowledge to aid in situational awareness, decision-making, and mission execution.

(6) Represent TRADOC MSCoE in the KMWG.

(7) Develop, provide, and oversee MSCoE KM guidance, strategy, vision, metrics, and doctrine that supports the Commander's Lines of Effort 5.4.

(8) Report to and advise the Chief of Staff and MSCoE on KM matters.

(9) Develop, publish, and implement a KM Plan for selected command-sponsored exercises or real-world events.

(10) Lead a KMWG and provide KM training.

(11) Ensure the KM program continues to collect and retain organizational knowledge.

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b. KMR:

(1) Directorates, all three schools and, brigades must provide two KMRs, a primary and an alternate.

(2) Completing the designated KMR course (KMRC), along with all its required preliminary courses. The KMRC course is provided by MSCoE KMO or through TRADOC training portal.

(3) The KMRC option is found under the menu title, "Select a course below to learn more details and course registration information." and it's the third option. <<https://www.tradoc.army.mil/ocko/training-portal/>>.

(4) Providing expert advice and support to the commanding officer as a staff section member, specifically in coordinating and integrating KM initiatives, standardizing practices and procedures and optimizing organizational KM efficiency.

(5) Participating as an active member of the KMWG.

(6) Acting as the initial contact for resolving urgent KM-related issues.

(7) Conducting updates to organizational digital platforms, including the removal of personnel who are undergoing the out-processing procedure, from both SharePoint and Teams Channels.

c. G-6:

(1) Offering specialized knowledge and expertise in the development of technology architecture for mission command systems, including hardware, network, and software components.

(2) Acting as a Subject Matter Expert (SME), contributing insights and recommendations to the organization's KM plan, and assisting the Chief Knowledge Officer (CKO) and relevant stakeholders in formulating information management policies and procedures.

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12. Point of Contact: For further information or inquiries regarding KM, this MOI, and its implementation, POC is the Knowledge Management Officer at MSCoE at (james.m.whittingham.civ@army.mil>.



MARK E. GLASPELL
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