



UNITED STATES MARINE CORPS
I MARINE EXPEDITIONARY FORCE
U. S. MARINE CORPS FORCES, PACIFIC
BOX 555300
CAMP PENDLETON, CA 92055-5300

I MEFO 5200.2
IMO
1 APR 2015

I MARINE EXPEDITIONARY FORCE ORDER 5200.2

From: Commanding General, I Marine Expeditionary Force
To: Distribution List

Subj: GOVERNANCE PLAN FOR I MARINE EXPEDITIONARY FORCE
(I MEF) INFORMATION MANAGEMENT/KNOWLEDGE MANAGEMENT (IM/KM) PORTALS

Ref: (a) I MEF FY14/15 Knowledge Management Strategy
(b) DOD 5200.01, DOD Information Security Program
(c) I MEF TAC Standing Operating Procedures (SOP)

Encl: (1) I MEF Governance SOP

1. Situation. As per reference (a), I MEF utilizes SharePoint as a primary application for IM/KM. Information Management (IM) is defined as all activities involved in the collection, processing, dissemination, storage, protection, and use of information. The Department of the Navy defines Knowledge Management (KM) as the integration of people and processes, enabled by technology, to facilitate the exchange of operationally relevant information and expertise to increase organizational performance. I MEF uses many other tools and applications that provide information and knowledge to the Commander and staff in order to enable effective Command and Control (C2) of a Marine Air Ground Task Force (MAGTF) in both garrison and deployed environments. The SharePoint portals are I MEF's primary collaboration tools. This document focusses on the governance of SharePoint and establishes standardized rules for its usage in both garrison and while deployed. For these reasons, SharePoint portal governance will be mirrored as much as possible in garrison and while deployed; any differences will be captured in Operations Orders, when applicable.

2. Mission. I MEF will put into practice an operational governance model for SharePoint activities in order to enhance the effectiveness of MAGTF C2.

3. Execution

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. To support the I MEF IM/KM Program with an end-state of creating a collaborative environment that enhances MAGTF C2 by increasing situational awareness, fostering better decision making, and promoting retention of organizational knowledge in both the garrison and deployed environments.

(2) Concept of Operations

(a) The I MEF Non-Secure Internet Protocol Router (NIPR) and Secure Internet Protocol Router (SIPR) SharePoint portals are the primary locations for collaboration and the sharing of information by all I MEF staff and Major Subordinate Commands (MSCs)/Elements (MSEs).

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(b) I MEF and each MSC maintains respective organizational sites that are accessible, relevant and actively managed.

(c) I MEF Command Element Primary/Special Staff Principals designate IM representatives to serve as Site Owners and Permissions Managers who will be appointed in writing and attend required training as per enclosure (1).

(d) The I MEF NIPR SharePoint Portal is for unclassified information only. Information on I MEF SIPR portal is handled in accordance with reference (b).

(e) If I MEF staff requires custom SharePoint portal functionality, navigation, and appearance it will require coordination and approval through the I MEF IM/KM Working Group.

b. Subordinate Element Missions

(1) I MEF Information Management Office (IMO)

(a) Operate, administer, and maintain the I MEF NIPR and SIPR SharePoint Portals.

(b) Coordinate IM training required by staff and component elements.

(c) Work closely with staff principals, staff sections, IM representatives, subordinate and higher headquarters' IMO's to ensure IM SharePoint portal procedures and processes are published and understood.

(d) Identify and nominate recommended information flow improvements/enhancements to the Chief of Staff (C/S); prepare/coordinate plans for any changes to establish IM/KM processes and procedures.

(e) Support continuous process improvement with the development and implementation of IM/KM tools that support command processes.

(2) I MEF KMO

(a) Through the IM/KM Working Group develop, distribute, and enforce I MEF NIPR and SIPR SharePoint portal governance standards and content policies.

(b) Establish IM/KM methods and tools in order to support continuous improvements to I MEF KM business processes.

(c) Establish processes and procedures required to implement I MEF content management.

(d) Facilitate electronic records management through the development and implementation of portal governance.

(e) Coordinate integration of I MEF NIPR and SIPR SharePoint portals with other tools in order to enhance I MEF IM/KM capabilities.

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(3) I MEF Primary and Special Staff Principals

- (a) Appoint Site Owners/Permission Manager(s) in writing.
- (b) Appoint IM/KM Section representative (officer/senior Staff Noncommissioned Officer (SNCO)) and alternate (E-5/E-6) to be an advocate for section requirements and to coordinate portal modifications.
- (c) Ensure Site Owners/Permission Managers complete formal training in accordance with paragraph 3b of enclosure (1) prior to being issued permissions and assuming duties.
- (d) Establish and maintain organizational sites and ensure sites are held to governance standards in this Order.
- (e) Coordinate with I MEF IMO/KMO on customized portal functionality, as required.

(4) MSC Commanders

- (a) Appoint organizational Portal Administrators.
- (b) Ensure personnel complete formal training in accordance with paragraph 3b of enclosure (1).
- (c) Establish and maintain organizational sites and ensure sites are held to standards via formalized unit/MSC governance policy.
- (d) Coordinate with I MEF IMO/KMO for support of portals, as required.
- (e) Establish and disseminate appropriate IM/KM SOPs and policies that enforce the intent of this Order.

c. Coordinating Instructions

- (1) Immediate user support and assistance will be provided by Site Owners/Permission Managers. Help Desk support for Site Owners/Permission Managers will be provided by I MEF IMO.
- (2) Training support procedures are outlined in enclosure (1).
- (3) Site Owners/Permission Managers control access to individual sites within the I MEF portals.
- (4) Users/Content Contributors will ensure content is business related and complies with this policy.
- (5) All Users/Content Contributors ensure content is in compliance with Personally Identifiable Information (PII) regulations and Privacy Act policies.
- (6) Enclosure (1) provides further information on governance policy and procedures.

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4. Administration and Logistics

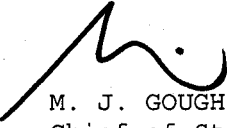
a. The I MEF NIPR SharePoint portal is hosted remotely at Marine Corps Enterprise Information Technology Services located in Kansas City, Missouri. Accounts may be requested via the IMO's Office.

b. The SIPR SharePoint portal is hosted locally and is accessible via a SIPR token, which is requested through the I MEF G6 Help Desk.

5. Command and Signal

a. This Order is applicable to all commands, organizations, units, and activities under command of I MEF.

b. This Order is effective the date signed.


M. J. GOUGH
Chief of Staff

Distribution: I/II

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I MEF Governance SOP

1. Introduction

a. Objectives. The primary objective of this Governance SOP is to establish a governing document for the usage and management of the deployed and garrison SharePoint environments. Other objectives are:

(1) Identify appropriate process owners willing to provide strategic insight and direction for the IM/KM portals and who are able to drive strategic initiatives for their respective organizations.

(2) Establish governing usage and maintenance policies and procedures for the SharePoint portals.

(3) Broaden understanding of related tools, systems, and applications that enhance IM/KM capability.

b. Audience. This document is intended to be read by all users of the SharePoint environment.

c. Scope. This Governance SOP includes I MEF environments including development, testing, and production of the SharePoint portals. This governance applies to both the garrison and deployed environments.

2. Definitions and Acronyms. The following basic definitions should be understood by all users.

Collaboration: A process whereby two or more people or organizations work together to achieve common goals by sharing knowledge, learning, and building consensus.

Content: Any document or object stored in a library on I MEF Portal Site.

Functional Site: A site that contains like content for a given topic. For example, a site that contains information specific to an exercise.

Information: Facts, data, and/or instruction in medium and form.

Information Management: All activities involved in the collection, processing, dissemination, storage, protection, and use of information.

Knowledge Management: The integration of people and processes, enabled by technology, to facilitate the exchange of operationally relevant information and expertise to increase organizational performance.

Organization Site: A site maintained by a single unit or department that is designed to represent a single business area within I MEF. For example, a staff section site.

Site: Groupings of lists, workflows, pages, master pages and page layouts.

Taxonomy: A way of classifying things or concepts by similarities in structure, use, concepts, relationships, or intent.

Workflow: The automated movement of documents or items through a sequence of actions or tasks that are related to a business process.

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3. Roles and Responsibilities

a. Information Management/Knowledge Management Working Group

- (1) Develop and prioritize I MEF IM/KM and portal requirements.
- (2) Develop policy and procedures to support effective use of the I MEF SharePoint portals and associated tools.
- (3) Develop and implement training plan that supports I MEF IM/KM policies and procedures.
- (4) Integrate I MEF, MSC, and adjacent command personnel in order to improve effectiveness of the IM/KM Program.

b. Individuals. The SharePoint environment consists of the following roles, each with distinct responsibilities and unique permissions. Establishing key stakeholders across I MEF ensures SharePoint service's success and stability.

Billet	Responsibilities	Permissions	Training
Site Administrator (e.g. I MEF IMO Site Administrator and IM/KM support team)	<ul style="list-style-type: none"> ➤ Administer and maintain Portals ➤ Manage security ➤ Create content and sub-areas ➤ Review and monitor usage reports ➤ Manage file size limits and site quotas 	<ul style="list-style-type: none"> ➤ Site Collection administrator ➤ No-portal configuration access ➤ Content management 	Microsoft Certified Solutions Expert certification for SP 2013 recommended
SharePoint Developer (e.g. I MEF IMO SharePoint Developer)	<ul style="list-style-type: none"> ➤ Build custom SharePoint web parts 	Full Control	Microsoft Certified Solutions Developer Certification for SharePoint 2013 recommended
Technical Analyst (e.g. I MEF IMO Trainer)	<ul style="list-style-type: none"> ➤ Provide first point-of-contact for end-user issues ➤ Communicate with end users to gather business problems and translate them into solution concepts/requirements ➤ Review and monitor usage reports 	Design rights	SharePoint classes levels 1 and 2
Site Owner/Permissions Manager (e.g. Department head team lead, end user, and anyone requesting a site for a business purpose).	<ul style="list-style-type: none"> ➤ Manage site layout (look and feel), structure, and content ➤ Can manage security for their site 	<ul style="list-style-type: none"> ➤ Grant access to this site, but not all sub-sites ➤ Sub-site creation rights ➤ Web designer permissions 	SharePoint classes levels 1 and 2
Contributor	<ul style="list-style-type: none"> ➤ Follow guidelines of Governance SOP when using I MEF Portals. 	<ul style="list-style-type: none"> ➤ Add, Delete, and Edit content (e.g. documents) 	SharePoint classes levels 1 and 2 recommended
Visitor	<ul style="list-style-type: none"> ➤ Follow guidelines of Governance SOP when using I MEF Portals. 	<ul style="list-style-type: none"> ➤ Read-only access to content 	SharePoint classes level 1 recommended

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4. Training. A robust user training program is a critical component to increase the efficiency and ongoing management of SharePoint, as well as associated tools at I MEF. MAGTF Integrated Systems Training Center-West or (MISTC-W) supports I MEF units and government personnel by providing training on various information technology and C2 systems used by the Marine Corps. There are no costs associated with MISTC-W courses for active duty and civil service personnel. In addition to the resources available through MISTC-W, the IMO at I MEF has dedicated staff to provide SharePoint assistance on a daily basis for all users as well as a monthly scheduled training workshop as part of the Information Management/Knowledge Management Working Group. A training schedule of in-house I MEF training is posted at below link:

<https://eis.usmc.mil/sites/imef/IMO/TrainingTutorials/SitePages/Home.aspx>

a. MISTC SharePoint Training. MISTC-W offers three levels of SharePoint training: the SharePoint Operator Level I course is a one day course intended to provide Marines with the knowledge and skills to use the features of SharePoint as a collaborative tool. The SharePoint Site Owner Level II course is a two day course that provides Marines with the knowledge and skills to manage a unit SharePoint site as the site owner. Lastly the SharePoint Advanced Site Owner Level III course is a two day course that further builds upon skills learned in the Level II course to increase knowledge of the site owner. The MISTC-W training schedule is posted on NIPR SharePoint at below link:

<https://eis.usmc.mil/sites/imef/G3/mistcwest/default.aspx>

b. Mobile Training Teams. Mobile training teams are provided upon request for units and I MEF personnel that are unable to attend the MISTC-W courses or scheduled training. The Information Management/Knowledge Management Support team located in the IMO at I MEF will provide over-the-shoulder training customized for each of the sections at I MEF. Outside of training end users on the basic functionality of the SharePoint portals; this team can provide user support with designing and maintaining SharePoint 2010 site collections, lists, document libraries, permissions, and other customizations to meet particular requirements. Teams can also assist in basic training and access to other available Department of Defense (DOD) IM/KM tools such as Defense Connect On-line (DCO) and Intelink. The centralized goal of the mobile training teams is to educate and train users on how automating processes via SharePoint and other available tools increase efficiencies (time saved performing routine tasks) and to enable knowledge sharing and collaboration (visibility and accountability).

c. Training Workshops. The IMO at I MEF provides monthly scheduled training workshops on the first and third Wednesdays of the month. These workshops focus on increasing awareness and usability of the customized SharePoint-based tools designed specifically for use at I MEF to synchronize staff and encourage standardized dissemination of information across the enterprise. Some of the commonly used tools at I MEF that are covered in the training workshops include the Task Tracker, Document Tracking, Master Calendar, and the Request for Information (RFI) Tracking. During the workshops there will be time devoted to the training of these frequently used tools and topics. These workshops will serve as a routine method for new members of the I MEF staff to become quickly acquainted with I MEF business practices.

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5. Site Hierarchy and Architecture

a. Hierarchy. Below is a basic summary of the types of sites that exist within the MEF.

<u>Taxonomic Section</u>	<u>Characteristics</u>	<u>Owners</u>
I MEF Command Portal/Battle Command Display (BCD), Command Billet-holder Sites	Permanent, Controlled	C/S and I MEF IMO
MSC Command Portals (e.g. MAW, Div, MLG)	Permanent, Controlled	C/S and Command IMOs
Regiments, Battalions, MEF Headquarters Group, Primary Staff and Special Staff Sites	Permanent, Less Centralized Control	Unit Commanders, Directorates, or Staff Site owners/managers
Exercise Site, Operations Sites	Permanent, Less Centralized Control	Exercise Planners or Staff Site owners/managers (G3/5)
Staff Section Sub-sites	Permanent or Short-lived, less controlled	Directorates, Staff or Site owners/managers

b. Architecture. All I MEF sites will contain certain information, which is outlined below. Due to the unique nature of missions across the sections, sites may be customized to ensure they are useful to unique missions.

(1) Staff Section/Special Staff Section Sites. Sites will contain the below basic lists, but may expand and/or customize sites based on mission and unique requirements.

- Customized Dashboard Module (actual dashboard unique to section)
- Documents Library
- Links
- Points of Contact (POCs)
- Orders and Publications (e.g. pubs/orders relevant to all)

(2) List and Library Types. Below is a more detailed explanation of types of libraries and lists available within SharePoint.

- Tasks - are used to track information about projects or tasks for a group or organization.
- Issue Tracking - used as a central storage point for issues and their status.
- Announcements - used to share important news. They are defined as a formal public statement or a broadcast statement. Announcements should be used in lieu of mass e-mails.
- Contacts - used to store information about people and groups.
- Links - used to share hyperlinks to commonly used sites by a unit or section.
- Document Library - Stores the majority of document files contained in a SharePoint sites. This library has document management capabilities, including check-in/check-out and automatic versioning to manage the file creation/sharing process.

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- Forms Library - Stores commonly used forms and templates.
- Picture Library - Allows photos and images to be shared in a collaborative environment.

c. Dashboards. Command Dashboard/Battle Command Display (BCD): This Dashboard will contain customized items to give the leadership the information it requires on a daily basis as well as information needed to make decisions. The BCD is subject to change based on Commander's needs, but currently contains the below set of information.

- Major Subordinate Command Tabs (NIPR/SIPR)
- High and Adjacent Command links (NIPR/SIPR)
- Common Operational Picture (SIPR) *Tactical Only
- Commanders Critical Information Requirements (NIPR/SIPR)
- Request for Information Tracker (NIPR/SIPR)
- Task Tracker (NIPR/SIPR)
- Intelligence Summary (SIPR)
- Significant Events Log/Announcements in Garrison (NIPR/SIPR)
- Operation Orders/FRAGOs (NIPR/SIPR)
- Battle Rhythm (NIPR/SIPR)
- Command/SSEC Calendar (NIPR) *Garrison Only

*Tactical only.

6. Permissions and Security. The Permissions Structure within the I MEF site is aligned with Organization and Site Structure. The model should balance the need to keep information secure with the need to share information amongst the team. Within SharePoint, this is managed primarily through the use of permissions and permission groups. These groups are defined by an organization's specific business processes and any legal policies or requirements. The IM/KM Team does not dictate these parameters, but will support building in security restrictions as required by sections. For example, a site that holds acquisition-sensitive data would require a security model that only grants access to authorized personnel who have executed a non-disclosure agreement (NDA).

7. File naming and Meta Data Tagging

a. Naming Convention. All MEF documents are named in accordance with the following naming convention.

DATE_CLASSIFICATION_EXERCISE_UNIT_SECTION_DOCTITLE_VERSION

- DATE: YYYYMMDD
- CLASSIFICATION, examples below:
 - U - UNCLASSIFIED
 - UNF - UNCLASSIFIED//NOFORN
 - C - CONFIDENTIAL
 - CNF - CONFIDENTIAL//NOFORN
 - S - SECRET
 - SNF - SECRET NOFORN
- EXERCISE/OPERATION: Specific exercise or operation, if applicable (e.g. MEFEX 15)
- UNIT: Unit that created document (e.g. MEF, MAW)
- SECTION: Staff Section that created document (e.g. G3, G5)
- DOCTITLE: Type of document or product (e.g. CUBBrief)

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* DOC Title names will not contain the characters (e.g. # % & *) and are limited to 10 characters

- VERSION: Version of the document
- For example: 2015010_U_MEFEX15_MEF_G3_CUBBrief_V1.docx
- File names should not exceed a total of 50 characters.

b. Meta-data tagging. The IM/KM Section will set up Meta-Data tagging that will automatically require users who are uploading documents to tag with certain pieces of information. In short, Meta-Data is data about data. There are two basic types, which are as follows:

- System-generated - listing of user who created document and version of document
- User-generated - Type of document defined by user such as in the meta-data drop down.

Metadata tagging results in consistency for grouping like documents and products. This combined with consistent file naming results in the increased ability for users to search for items within SharePoint portals.

(1) Organization Tag (Mandatory). The Organization Tag is a managed metadata term set that identifies what organization the document belongs to. This metadata becomes important if and when an item is migrated to a Records Center. The Organization Tag should have the official name of the organization that generates the document.

(2) Document Type (Mandatory). The Document Type is a Managed Metadata term set that signifies what kind of document a file is. The tags align to the specific types of documents identified by I MEF. The below is a list of document types, along with examples of each. Note: The examples are not all inclusive.

- Staff Package Documents. Examples include, but are not limited to the following:
 - o Routing Sheet
 - o Information Paper
 - o Decision Paper
 - o Position Paper
 - o Memorandum for the Record
 - o Trip Report
 - o After Action Report
 - o Comment Resolution Matrix
 - o Talking Paper
- Senior Officer Documents. Examples include, but are not limited to the following:
 - o Trip Book
 - o Brain Book
 - o Read-Ahead
 - o Tank Brief
- References. Examples include, but are not limited to the following:
 - o DOD Directive
 - o DOD Instruction

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- o DOD Manuals
- o Joint Publication
- o Secretary of the Navy Instruction
- Marine Corps Issuances. Examples include, but are not limited to the following:
 - o Marine Corps Order
 - o MARADMIN
 - o ALMAR
 - o ALNAV
- Administrative. Examples include, but are not limited to the following:
 - o Organizational Chart
 - o Roster
 - o Recall Roster Marine Corps Action Tracking System (MCATS) Task Document

(3) Standard Subject Identification (SSIC). (Optional) SSICS will further narrow down the type of document in order to facilitate searches and for ease of archiving items as records. This drop down is optional as it does not apply to all items being posted to the portals. Note: SSICs may be added and the list below is not all inclusive.

- 1000 Military Personnel
- 2000 Telecommunications
- 3000 Operations and Readiness
- 4000 Logistics
- 5000 General Administration and Management
- 6000 Medicine and Dentistry
- 7000 Financial Management
- 8000 Ordnance Material
- 9000 Ships Design and Material
- 10000 General Material
- 11000 Facilities and Activities Ashore
- 12000 Civilian Personnel
- 13000 Aeronautical and Astronautically Material

8. Workflows

a. Task Tracker. The I MEF Task Tracker is a SharePoint list that allows the staff to track tasks directed from Higher Headquarters, the Commanding General, and Chief of Staff. The Task Tracker is used as a static list with active tasks reviewed regularly at the Staff Synch each Monday morning, and also at the Chief of Staff's weekly meeting on Wednesdays. In order to increase visibility and make the Task Tracker more robust, SharePoint workflows are part of the Task Tracker and automate the assignment of tasks. Tasks are added to the I MEF Task Tracker by staff members who are designated by respective Assistant Chief of Staff's (AC/S). MCATS tasks are input and monitored by the G3.

(1) Task Tracker Dashboard. If deemed appropriate by the Section AC/S, tasks may be flagged for command level interest, and may then be viewed on the Task Tracker Dashboard.

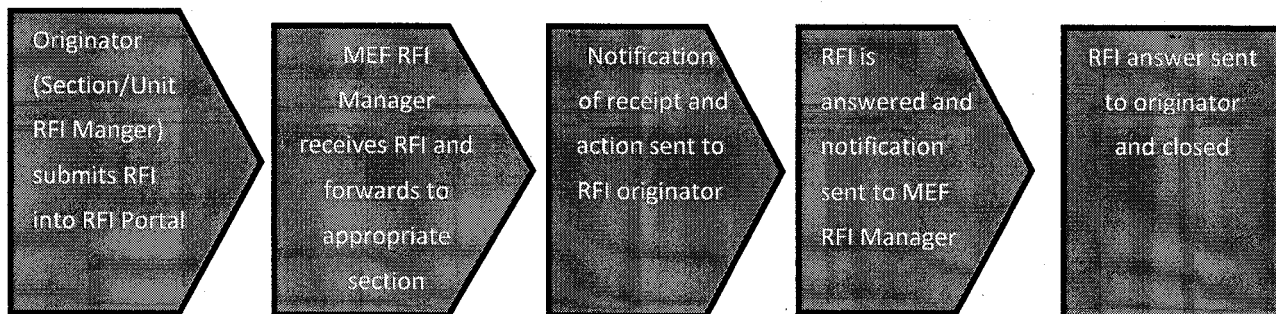
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(2) Task Tracker Workflows. SharePoint workflows are used to automate task assignments and route documents through I MEF. There are currently three different workflows for the staff to use on the Task Tracker based on the level of visibility required for the particular task - Command Deck (CDEMail), AC/S Principals (PrincipalEmail), and MCATS Tasks (MCATSEmail). The workflows allow any task on the Task Tracker to be assigned to an individual on the staff or to a section. SharePoint email groups are also available for all staff sections to be used for assigning whole sections to a workflow vice individuals. Once the workflow is initiated, SharePoint will generate automated emails to the personnel or sections tasked and progress on the task can be monitored at any time by simply clicking on the workflow task. The originator of a task also receives automated emails on the task status (complete, overdue, etc.).

b. Document Routing Workflow. There is a specific document routing workflow that enables I MEF to electronically route documents. Users are able to assign document review in either sequentially or concurrently. The document routing tool also is equipped with an electronic routing sheet and users may attach a comments matrix or other documents to aide in the collection of feedback. The tool also sends alerts to individuals or user groups when it is their turn to review document.

c. Requests for Information (RFI) Tracking. Tracking and closing out RFIs is fundamental to effective staff work and decision making. RFIs may be generated internally from the staff or leadership, as well as from higher, adjacent, or subordinate commands. As per reference (c) the staff uses SharePoint as the means to capture and track RFIs.

The basic RFI process is as follows, and is replicated with a workflow within SharePoint.



RFI Submission. I MEF and MSC RFI Managers must access the I MEF RFI Tool to submit an RFI. Any RFI submitted will be visible to all personnel who access the site. See the instructions below to complete the RFI Tool data fields. RFI tool is located on NIPR and SIPR SharePoint homepages.

- Requester Rank, LName and FName. Fill in rank, Last Name and First Name of the originator via free text.
- Requester MSC. Use drop down to populate requesting MSC.
- Requester Unit/Section. Type in specific requesting unit and section.
- Requester Email. Type in requester email address.
- Requester Phone. Type in requester phone number.
- Subject. Fill in via free text RFI Title with no more than 50 characters.

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- Type of Request. From the drop-down menu, select the appropriate Warfighting function (e.g. Intelligence) to route the RFI to the appropriate RFI manager for staffing.
- Amplification. Type in long description, if needed.
- Supporting Information. Include any supporting information such as background information that might aide in answering RFI.
- Justification. Reason why RFI is being submitted.
- Pre-coordination Information. Type in information on any pre-coordination already completed in researching RFI, if applicable.
- Prior Research. Type in any prior research that was done prior to submitting RFI, if applicable.
- Region. Use drop down to select region.
- Requested Completion Date. Use calendar to insert desired completion date.
- LITVO Date (Last Time Information is of Value). Using calendar drop down, provide the date for which the information will no longer have value.
- Dissemination Method. Preferred method of answer, if not electronic.
- Total Hard Copies. Total number of hard copies requested, if applicable.
- Classification. Use dropdown to selected level of classification.
- Recurring. Identify if the RFI recurring
- Recurring period. If recurring, identify period of recurrence

d. Integrated Calendar. The SharePoint Integrated/Master Command Calendar reflects command level items. This calendar is synched with the Staff Secretary (SSEC) Battle Rhythm Calendar daily; note, this is a one way synch from the SSEC Outlook Calendar to SharePoint. I MEF staff will enter calendar events directly into SSEC Battle Rhythm calendar, which is a Microsoft Outlook shared calendar. The basic process flow for input is as follows:



Users can access the SSEC Battle Rhythm Calendar through the following the below steps:

- Click on folder icon in bottom left hand corner within Microsoft Outlook.
- Click on 'Public Folders' and then click on 'All Public Folders.'
- The path to the SSEC Calendar is as follows: Marines => I MEF => SSEC => SSEC Battle Rhythm.
- Right click on SSEC Battle Rhythm and add to favorites. Calendar then appears in personal calendars list.

Specific business rules for calendar are as follows:

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(1) Approval from the Section AC/S, Deputy or designated Action Officer must be given prior to entry to minimize duplicity.

(2) Enter the subject, then the responsible AC/S immediately following in parentheses, i.e. SECDEF Visit (Protocol).

(3) Within the notes section, utilize the 7-Minute Drill format as per below to outline relevant information:

- Subject
- Purpose
- Expected Inputs
- Expected Outputs
- Key Tasks
- Meeting Leader/Chair
- Facilitator
- Frequency/Location
- Membership/Participants

(4) When entering all-day events, you must manually select the appropriate times, i.e. 0730-1630 or the dates will be displayed incorrectly.

(5) Each event can be edited by anyone.

(6) If an event is cancelled, place cancelled (CNX) prior to the title; it informs people of the cancellation vice the event moving to another date/time.

(7) An event can only be deleted by the person who entered it; the SSEC is the only one who can delete other users' events.

(8) Do not use this calendar for invitations. To invite individuals to a meeting, copy the event to your own personal calendar first and then do a meeting invite.

(9) If you copy an event from your calendar to the SSEC calendar, please remove the "Copy:" from the event title.

(10) Refrain from entering large data files into the notes section. If over 2 MB a link should be used to access associated items.

9. Content Management Lifecycle. The content management lifecycle describes the different stages of content management, from the point that the data is added to the system to its disposal and/or retention.

a. Collaboration and Versioning. After a file has been added to a document library, it is considered to be in the 'collaboration' phase. In this phase all users with contribute rights to the library are able to edit documents and add new versions. Content should only be posted to the portal one time, with a single authoritative source for the file.

b. Archiving. There is only a limited storage capacity within the I MEF SharePoint portals. Therefore I MEF must adhere to archiving procedures in order to ensure sites run efficiently and that there is adequate space available for users. The following policies are in place.

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(1) When a final version of a document is approved and unmodified for one year it is archived.

(2) There is an IMO developed SharePoint archive site that is accessible via a link on both the NIPR and SIPR SharePoint portals where staff can archive older documents as per the above.

c. File Saving and Compression.

(1) When sending files or uploading files into SharePoint care should be taken to compress and minimize file size. The following are examples of processes that may be used to reduce file size.

(a) When saving final documents or products save as PDF file and choose 'optimize for minimal size' prior to uploading.

(b) If there is access to file compression software such as NXpowerlite, it will be utilized prior to uploading or sending products.

10. Other Collaboration Tools. There are numerous systems and applications that are used in conjunction with SharePoint in a field/deployed environment, as outlined in paragraph 11a. In garrison the majority of collaboration is done via SharePoint. However, the DOD has existing tools that can easily be accessed and utilized by its members. The following tools should be the primary means of collaboration by MEF staff:

a. Defense Connect On-line (DCO)/Adobe Connect. DCO can be used for meeting collaboration, to set up chat rooms, or to simply chat amongst members of the DOD. The KM/IM Shop can assist users in setting up accounts on both NIPR and SIPR.

b. IntelLink. Suite of collaborative tools to include SharePoint, Chat, and Groups that enables DOD personnel to collaborate in a NIPR and SIPR environment.

c. All Partners Access Network (APAN). Unclassified collaborative tool that enables the DOD and partners to collaborate during exercises and real world operations.

d. Military Suite (MILSUITE). A suite of collaboration tools available to all DOD members and contractors.

11. Command and Control Systems

a. For informational purposes, the following is a listing of the common C2 Systems and Applications that are used in order to give the Commander the required Common Operational Picture (COP). The MEF SharePoint NIPR and SIPR portals and these systems together provide the information and collaboration capability in order to give the Commander the best possible COP.

Systems

- Advance Field Artillery Tactical Data System (AFATDS)
- Agile Client
- Automated Message Handling System (AHMS)
- Battle Command Support Sustainment System (BCS3)
- Blue Force Tracker (BFT)
- Command and Control Personal Computer (C2PC)

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- Common Logistics Command and Control System (CLC2S)
- Computer Forensics
- Digital Terrain Analysis Management System (DTAMS)
- Global Broadcast Service (GBS)
- Intelligence Analysis System (IAS)
- Intelligence Operations System (IOS)
- Intelligence Operations WorkStation (IOW)
- Intelligence Analysis System (IAS)
- Joint Automated Deep Operating Coordination System (JADOCS)
- Joint Battle space Viewer (JBV)
- Joint Tactical Common Operational Picture Workstation (JWTTC)
- Joint Warning and Reporting Network (JWARN)
- MARINELINK
- MAKO Chat (MAKO)
- MAGTF Tactical Warfare Simulation (MTWS)
- Naval Integrated Tactical Environmental System (NITES)
- Palantir
- Precision Strike Suite-Special Operations Forces (PSS-SOF)
- Tactical COP Server (TCS)
- Tactical COP Workstation (TCP)
- Tactical Exploitation Group (TEG)
- Theater Battle Management Core System (TBMCS)
- Transportation Planning Capacity Tool (TCPT)

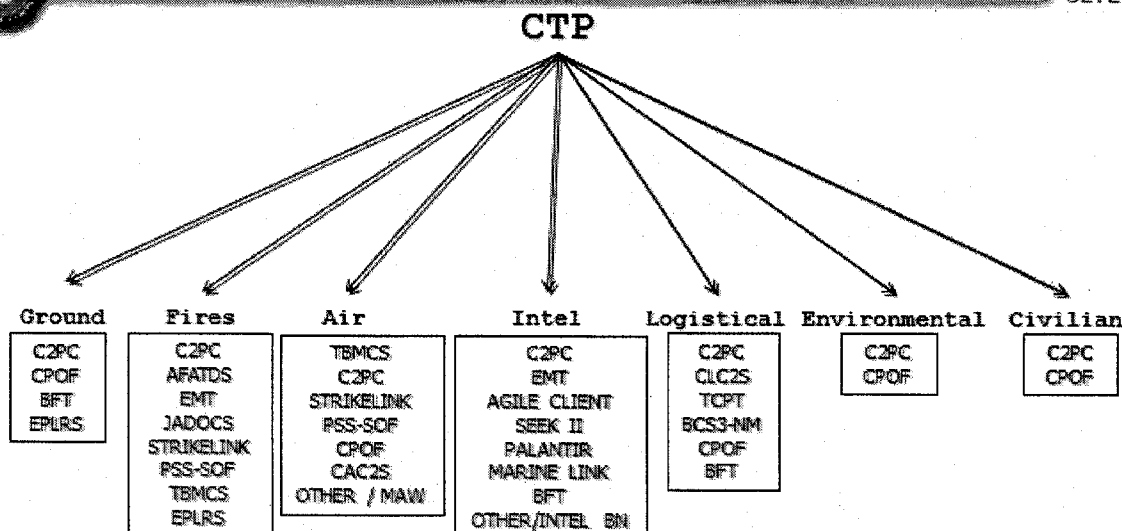
b. The below diagram breaks down commonly used systems supporting the Combat Operations Center (COC), Common Tactical Picture (CTP), and Operations.

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C2 Systems Supporting the COC, CTP and Operations

C2TECOE



- Systems common to all sections and COC operations are Share Point and Chat (MAKO, Transverse, Spark)
- There are MANY other systems that are mission/theater/command/echelon of command dependent and are purview of IMO and CoS to direct/arrange after staff actions determine need.

FOR Future Plans and any OPT, the PAE (Plans Application Extension) in C2PC provides immeasurable benefit to COA Dev, Wargaming, and Orders Development/formatting/printing

12. Enforcement and Auditing. In order to ensure quality control and to enforce the standards in this policy, the IMO/KMO will audit each NIPR and SIPR SharePoint site at least once annually. This includes section sites, operations sites, and exercise sites. Sections and Site Owners will be provided with the auditing schedules.