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2010 AOKM Conference

Army Vice Chief of Staff is Keynote Speaker

Lara Aguilar, AOKM Conference Coordinator (Contractor)

Nearly 500 knowledge management professionals will soon be on their final glide path into Kansas City for the 6th Annual Army Operational Knowledge Management (AOKM) Conference, October 18-21.

Scheduled speakers include: GEN Peter Chiarelli – Army Vice Chief of Staff; LTG P.K. (Ken) Keen – Military Deputy Cdr, USSOUTHCOM; LTG Frank Helmick – CG, XVIII Airborne Corps & Fort Bragg; BG Allen Batschelet – G3, USAREUR; BG Bryan Owens – Commandant, US Army Infantry School; and Brigadier Mark Holmes, MVO - Commander, Land Warfare Development Center, Australian Army.

If you have any questions about the conference, please visit the conference website, or contact the Conference Coordinator at (913) 684-6364, e-mail: lara.m.aguilar@us.army.mil.

For the conference website, users with an AKO account use this link:

https://ikn.army.mil/apps/CONF_TEMPLATE/index.cfm?id=36 Users with no AKO account use this link: https://ikn.army.mil/anon/CONF_TEMPLATE/confindex.cfm?id=36 with Username AOKM2010 and Password: BCKS.

Integration of KM within the Army Forces Generation (ARFORGEN) Process

Eric Olsen, I Corps Knowledge Management Advisor (Contractor)

To achieve maximum benefit from its Knowledge Management (KM) program, Army units must integrate KM throughout all phases of the ARFORGEN process. Army units fall within one of three ARFORGEN Phases.

Units in the **Reset/Train** phase undergo Soldier-family reintegration, staffing



Army Vice Chief of Staff
GEN Peter Chiarelli

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and new equipment fielding, and limited individual/leader training. The second phase, **Train/Ready**, is characterized by collective training and the progressive build-up of combat readiness with a focus on full spectrum operations. Finally, the **Available** phase is a time during which the unit is at its highest state of readiness and is prepared to deploy worldwide.

We will look at the activity within each of these phases of the ARFORGEN process, and provide examples of how knowledge management may be applied.

Reset/Train Phase

Army organizations begin to think about the Reset Phase during their deployment. Given the multitude of requirements inherent in conducting combat operations, transfer of authority (TOA) and re-deployment, it's not surprising that units are not optimizing knowledge capture and retention. Army leaders' initial focus is on their mission to reconstitute, reset equipment, receive new equipment, assign new personnel, and train to achieve the required capabilities necessary to enter the Ready Pool.

During this period of high turnover, Army units face the challenge of knowledge capture and retention. The key to KM success, to a large degree, is established early during deployment. Unit re-deployment and Reset training plans must address organizational level knowledge management requirements.

Army leaders at all levels must address the process of capturing, organizing, documenting and archiving critical knowledge objects including: AARs, TTPs, SOPs, lessons learned and historical records. This spectrum of knowledge ranges from explicit knowledge stored on servers and deployed networks to the tacit knowledge of unit leaders.

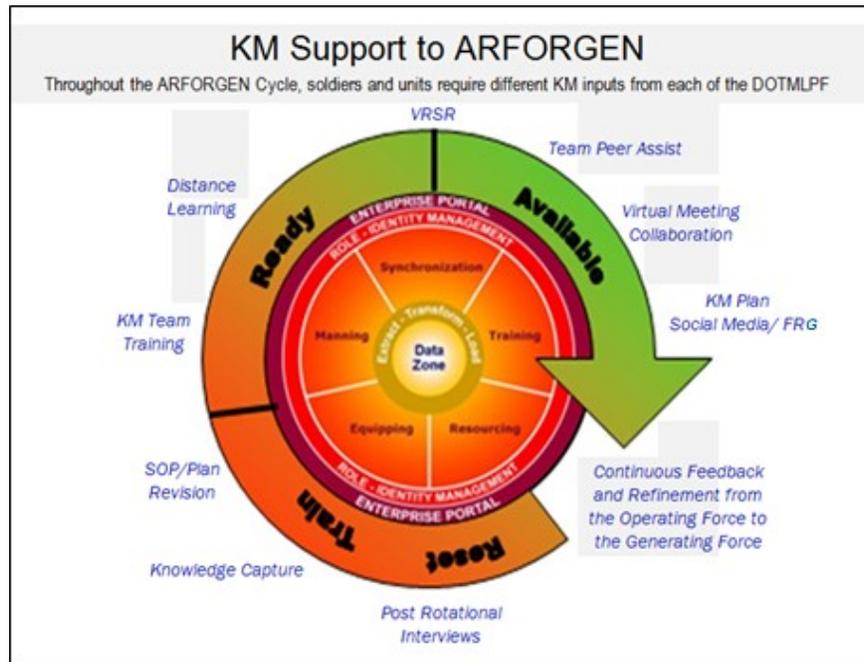


Figure 1: KM in Support of ARFORGEN

Figure 1 (KM Support to ARFORGEN) identifies continuous feedback and refinement as a key component of

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KM. The capture, analysis and distribution of observations, insights and lesson learned from the operating force to the generating force include the capture of the internal tacit and explicit knowledge from both the unit and external sources.

In order to capture best practices and lessons learned, returning units participated in installation “Umbrella Weeks.” The importance of capturing these oral histories cannot be overstated. These personal accounts of success, as well as failure, serve as the starting point in the development and execution of an organization’s training strategy. This knowledge can be used for scenario or vignette development and to revise doctrine. Other knowledge acquired through this process, such as the collection of lessons learned and best practices from the unit upon its return from theater, can be archived into the organizational knowledge repositories, SOPs, plans and external sources such as the Warrior Knowledge Base.

Soldiers facing competing requirements for their time may not understand the importance or purpose of these interviews. The key to successful knowledge capture is command emphasis and educating our Soldiers on the “why.”

Ready Phase

The focus of units in the Ready Pool is mission preparation and collective training for anticipated future missions. As operational tempo increases, units should continue KM training with an increased emphasis on the integration of KM throughout the organization’s operational processes. Units in this pool are eligible for deployment to contingencies or other operational requirements. Listed below are areas of KM emphasis.

- **Establishment of the KM Team:** Post re-integration KM activity must include assignment, development and integration of the KM Team into the command and staff structure. Key is early identification of KM personnel so they can receive necessary training such as the KM Basic or Qualification Course at Fort Leavenworth, as well as training in collaboration tools such as Army Knowledge Online (AKO), Defense Connect Online (DCO) and SharePoint.
- **Training and Operation:** Based on the organization’s mission, Full Spectrum Operations or theater specific, the KM team should apply KM methods to operational and mission activities. These KM methods may include: revising plans and SOPs; acquiring, applying and even customizing technology to support organizational processes; developing an integrated and supportive battle rhythm; educating and training soldiers in the use of AKO, DCO or SharePoint; and highlighting the benefits of collaboration and collective learning through Communities of Purpose or Practice.
- **Mission Readiness Exercises/CTC:** The culminating training activity for a unit is either an MRX or a CTC rotation. Prior to participating in either of these events, the KM Team must have defined processes and tools in place, such as a portal, a well thought-out battle rhythm and trained personnel to support organizational KM requirements. It is during these collective events that the KM team must capture and recognize those tools and processes that work and those that require modification. The KM team supports the collection, storage and access of AAR products. This allows for the incorporation of lessons learned and best practices into refined SOPs and policies prior to deployment.

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Available Phase

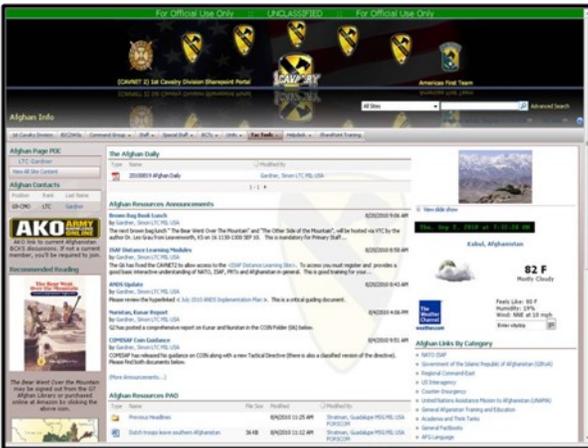
Units in the Available Pool are available for worldwide deployment. During this phase of the ARFORGEN process, units maintain their readiness by continuing to incorporate relevant and current knowledge from the field. The KM team continues to provide value in several areas:

- **Virtual Right-Seat-Ride (VRSR), Virtual Meeting and Collaboration:** Learning before doing and use of virtual and collaboration technology can greatly assist units prior to and post Pre-Deployment Site Survey visit. Having the ability to access current plans and operations via the deployed unit's operational portal, or conducting DCO meetings and VRSRs with counterparts becomes increasingly important as deployment draws closer. The transfer and sharing of lessons learned, best practices, and operational experiences through the use of virtual meetings and collaborative sessions has a positive cumulative impact on both the deployed unit and the unit preparing to transition into theater.
- **Reach-back and Integration:** Knowledge management personnel should also consider how to leverage resources within the institutional Army and home station. The ability to leverage Army school houses or participate in symposiums, conferences or online forums can greatly assist deployed commanders and staff by providing reach-back to subject matter expertise. Each KM Section should also consider the capabilities and structure of the Battle Command Training Centers (BCTC), the Knowledge Management Section of their Mission Support Element (MSE), Battle Command Knowledge System (BCKS) and supporting Knowledge Management Advisors when developing the strategy and process to leverage external sources while deployed.
- **Knowledge Capture/Content Management:** It takes planning to overcome the challenges of storage and transit of classified and unclassified but sensitive knowledge objects. The physical transit of material using couriers is cumbersome and less effective. The KM Section should consider developing an AKO or SharePoint Portal that is accessible from theater for document and file storage. This eliminates the requirement for couriers, but, more importantly, these documents are then available during all phases of transition into theater.
- **Family Readiness and Social Media:** Knowledge Management Sections should also consider how the unit desires to maintain contact with family members during deployment. The KM Section can provide much needed support to Family Readiness Groups by helping them reach out and communicate with family members. Consider the use of tools such as the virtual Family Readiness Group site, AKO and other commercial sites as potential solutions. Likewise, the use of Twitter, Facebook and Flickr as communication platforms may be considered. Soldiers can use these systems to communicate with family members. Therefore, organizational family support plans must address and educate Soldiers and their families on the use of social media.

The operational Army must continue to apply knowledge management activity throughout all phases of the ARFORGEN process. The supporting knowledge management activities and requirements for each phase differ only with the intent and changing priorities of each phase of the ARFORGEN process. The real key is assigning and training our Soldiers, choosing and empowering technology, and enabling processes that provide commanders and leaders the required knowledge at the right time. [\(Return to Menu Page\)](#)

New Knowledge Portal Helps 1st Cav Div Prepare for Deployment

Dave Shaw, 1st Cavalry Division Knowledge Management Advisor (Contractor)



The 1st Cavalry Division's CG at Fort Hood, Texas was adamant while addressing his staff during his first Officer Professional Development (OPD) session. "We're just 12 months from deployment, and we have plenty of experience in Iraq, but how many of us have any experience in the Afghanistan Theater?"

Few of us raised our hands. The next day during the morning G3 huddle, COL Pinkerton asked the Knowledge Managers, LTC James Brown and MAJ William Allen, to stay behind to talk about how we can implement the CG's guidance from the OPD. The G3 pointed out that neither the staff nor the Soldiers

themselves have the time to do their own in-depth research. He tasked the KMOs to develop an area on the portal. He then tasked the G9 LTC Gardner and the Center for Army Lessons Learned (CALL) Lessons Learned Integrator (L2I) Mr. Luis Rivera, to find the relevant knowledge about Afghanistan and our expected Area of Responsibility (AOR) and get it to that spot so the staff and the units could educate themselves without having to hunt for it. If the KMOs needed clear guidance and intent, they just got it.

Now, how to go about it? MAJ Allen first built an Afghanistan Information homepage on the CAVNET2 site on Fort Hood's SharePoint portal. Highlighted at the top of the site is a daily posting of a current news article or discussion from one of several forums called the "The Afghan Daily." Also prominently displayed is an Innovative "Recommended Reading" link that uses the highlighted book's cover as a direct link to Amazon for those wishing to review and perhaps purchase the book, as augmentation to multiple hard copies the Division loans out to the staff.

As the 1st Cav Div's Battle Command Knowledge System KM Advisor (BCKS KMA), I built a sister site on the Division's CAVNET-AKO site to work around issues that the CAVNET2 SharePoint portal could not handle. These were primarily Really Simple Syndication (RSS) feeds, a format for delivering regularly changing web content, and direct links to BCKS Professional Forums, including Civil Affairs and PSYOP, Counterinsurgency (COIN), and Human Terrain/Cultural Awareness.

Building a site is like building a store: unless you have plenty of the goods that customers want, they won't come back. To make the sites credible, we needed to make sure these shelves were stocked with current and relevant products for these specific customers. Fortunately, 1st Cav Div already had a model of effectiveness built on the partnership of the BCKS KMA and the CALL L2I who are both conveniently co-located in the KM cell.

They put out an "All Points Bulletin" for initial content to stock the site and in less than 24 hours received help

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from BCKS, CALL, the COIN Center and the Peacekeeping and Stability Operations Institute (PKSOI). After a quick analysis, I designed an initial [taxonomy](#), or cataloging system, and built subject folders as content continued to flow in.

When the 1st Cav Div BCT commanders viewed the sites, they were impressed enough to request assistance in having a similar site for the Iraq AO, since their BCTs were deploying to Iraq, instead of accompanying the Division HQ to Afghanistan. LTC Brown developed the Iraq Information CAVNET2 SharePoint site, while I built a sister site on AKO.

After another request for assistance to BCKS, CALL, PKSOI, and the COIN Center, the sites were soon up and running. Both the Afghanistan and Iraq AKO sites continue to be works in progress. Response to all the sites has been overwhelmingly positive. While the responsibility has been delegated to the G9 for Afghanistan content, the 1st Cav Div KM cell specialists continue to provide assistance, innovation, and subject matter expertise for as long as required for both sites.

Further Information:

So You're Going To Be A KMO: <http://usacac.army.mil/cac2/bcks/Connected/ConnectedSummer2010.html#KMO>

CAVNET2 Afghan SharePoint site: <https://moss.hood.army.mil/units/1CD/tactools/Afghan/default.aspx>

CAVNET-AKO Afghan site: <https://www.us.army.mil/suite/page/633290>

CAVNET2 Iraq SharePoint site: <https://moss.hood.army.mil/units/1CD/tactools/iraq/default.aspx>

CAVNET-AKO Iraq site : <https://www.us.army.mil/suite/page/247011>

Connected™ wants to hear about your KM Best Practices

In a world where knowledge is the key to learning, growth, innovation, and effectiveness, knowledge management provides a hotbed of new approaches and new issues. Connected™ wants to highlight your organization's KM Best Practices. We invite you to tell us about your KM programs by contacting MCCOEWebmaster@conus.army.mil by 15 November. Our staff will conduct an interview to help you tell your organization's story.

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I Corps Battlefield Information Collection: Getting at the Illusive Holistic COP

Based on an unpublished article by Mr. Dwaine Boteler, I Corps KMO, and edited by Eric Olsen, Knowledge Management Advisor,

I Corps experiences in Iraq revealed that the current view or picture depicted by systems such as Global Command and Control System (GCCS) provides the commander a view limited to maneuver and ISR assets. Yet, the operational environment requires a more comprehensive situational awareness and visualization tool that takes them beyond the norm depicted by tools such as GCCS.

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What commanders are looking for is an integrated capability that displays information from across the PMESII (Political, Military, Economic, Social, Infrastructure and Information) and DIME (Diplomatic, Intelligence, Military and Economic) both geospatially and relationally to provide a holistic common operational picture (COP).

The concept proposed in this paper does not advocate a single system or view; thus the term COP is replaced with Battlefield Information Collection (BIC). BIC highlights the fact that the commander and his staff require a comprehensive collection of useful information that is centrally located and displayed to assist in making informed decisions.

Key Points:

- A traditional COP possesses a limited geospatial display of traditional forces and ISR assets which is grossly inadequate in the COIN environment.
- The COIN fight forces us to rely much more heavily on the other elements of PMESII to provide situational awareness.
- COIN relies more upon non-kinetic influences than a traditional fight.
- What commanders need is a situational awareness tool that:
 1. provides a classic geospatial view of force on force and ISR assets.
 2. has a customizable view capable of depicting objects from across the PMESII geospatially.
 3. captures, depicts and analyzes associations between PMESII objects.
 4. allows objects to be analyzed against existing models or goals.
 5. allows for the near real time visualization of operations to support mission execution.
 6. reduces the burden on the staff by automating the tasks of collection, data manipulation and reporting.
 7. helps the staff focus on understanding the significance of the data.

The key to the development of a situational awareness tool is the use of fixed format data and a capability to capture and normalize data coming from a variety of military systems that are not necessarily compatible. The use of fixed format data supports the detailed analysis of data, improved search functionality and the mobility of data across security domains.

For every data object captured, we must be able to assign the metadata elements that answer the “who, what, why, when and where” with specific values. This is accomplished through the use of pull downs, pick lists or range limited fields. Multi-National Corps-Iraq (MNC-I) used Combined Information Data Network Exchange (CIDNE) as its database of record for the majority of its operational data.

CIDNE uses a mix of fixed format and free text data fields to record the majority of data affecting the Iraqi battle space across the PMESII. CIDNE uses fixed format data to capture the data answering “who, what, why, when and where” that is required to be able to parse the information for analysis. The use of mixed format data allows the flexibility to maintain the rigid structure required for automated analysis while allowing flexibility in selected areas that add clarity to reports.

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When information is already tracked and compiled in pre-existing DOD systems and it is impractical to move that data from its existing storage location, we should integrate the data into the BIC from its current location. The problem with integrating this data is that each of these systems tends to utilize differing standards for their information systems. Making this information useable requires a capability that pulls data from its original location and reconfigures it in a standard format that is usable across our BIC.

To accomplish the task of bringing a variety of disparate data sources together, MNC-I used business intelligence. With business intelligence, we can normalize data through the process of extraction, transformation and loading (ETL), store it in a data warehouse, and bring it into what is known as the Online Analytical Processing (OLAP) cube. The cube provides a resource that allows us to take what is normally a collection of flat files and stand them up so that any information contained within the cube can be readily compared against any other data.

Putting it all together, MNC-I, as did many other commands, had a variety of data sources within theater from which they could choose to pull to present reports and run queries. The general rule used when displaying this data was to first attempt to use built-in capabilities to display data prior to employing business intelligence or reaching out to other resources to display data so long as the resident capability adequately represented the information in a way that met the commander's and staffs' intent.

Another general rule is that the displays should be grouped into category types and that the display of each category type should be standardized to the maximum extent possible. By way of example, some of the display categories included roll-up dashboards, trend charts, key performance indicator displays, indicator dashboards and detailed drill downs.

The portal is the point at which the BIC is collated. As the primary tool for collaboration and information dissemination within the command, the portal is the logical gathering point for this information. Using a series of dashboards and geospatial maps, the portal has become a collage of battlefield information that informs the command from a top level view all the way down to individual data elements depending on the level of detail required or desired by the command and staff.

MNC-I consolidated views of a wide variety of information types under the CIDNE and Business Intelligence programs. Under CIDNE, a wide variety of data types is represented and various displays are provided. In addition to CIDNE data, the Business Intelligence team integrated extensive data on logistics, basing, electrical generation, infrastructure and polling to provide a much broader view of the factors affecting the understanding and decisions made by staff officers and leaders in Iraq. As a measure of this success, the leadership of the Corps left Iraq convinced of the value of a common database of record and business intelligence.

It is hoped the work will continue in Iraq and the efforts at Fort Lewis will bear fruit so that the combined efforts can be merged to provide an even more holistic view that spans from force generation to current battlefield operations and future planning.

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A Framework for Developing a KM Strategy

Mark Uhart, Enterprise Content Management Professional (Contractor)

Much is written on how to develop a knowledge management strategy for an organization. Just as KM teaches us how to think rather than what to think, a KM strategy allows us to apply a disciplined approach to problem solving. Peter Senge, a social scientist who authored *The Fifth Discipline: The Art and Practice of a Learning Organization* (Senge 1990), describes five disciplines of the learning organization

- personal mastery
- mental models
- building a shared vision
- team learning
- systems thinking

How can you apply these learning disciplines within your organization to develop a KM strategy that evolves with the organization?

Personal mastery

Think of “personal mastery” as your “personal KM.” Being the new Knowledge Management Officer (KMO), how do you create your personal vision of how KM can support the business strategy? Where do you focus your energy? Who should you talk to in order to gain an objective view of the knowledge resources that need to be personalized or codified, explored or exploited, and combined or internalized?

Start by reading as much as you can and collaborating to find out how others developed their KM strategy and why they decided on a particular model or framework. Examples abound: the United Nations, the World Bank, American Red Cross, and many U.S. Federal agencies (NASA, NOAA, U.S. Forest Service, etc.). Because every organization is different we develop our own perception of the value of knowledge and how it flows within our organization. That takes us to Peter Senge’s second discipline, the mental models created by key leaders and stakeholders.

Mental model

Developing a mental model requires an understanding of the mental models other key personnel hold about how information *should be* created, captured, shared, codified, analyzed, transferred, protected (as is the case with classified and controlled unclassified information), stored, managed, preserved and delivered. Learning styles and behaviors, education and training, leadership roles and responsibilities, preferences for personalization or codification, and the organization’s structure and culture, all play into why we create the mental models we do. Army doctrine, the mission, and commander’s intent are also heavy hitters in the mental models we create.

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But beware, according to Senge ---“The mental models of managers are the greatest barrier to organizational change and learning.” The KMO must “hit the road” to understand the people (individuals, organizational structure and culture), business processes and available technology to develop his or her mental model of knowledge creation, use and value. Because the operational environment is in constant flux so are our mental models of how we should be sharing information.

Shared vision

From theatre to company level, military operations are guided by the commander’s intent. The strategic, operational and tactical shared visions of military operations are pushed down to commanders for execution. Primary and special staff, and subordinate commanders, provide input as part of the military decision making process (MDMP) resulting in ownership for their part of the operational plan.

But what is the shared vision for managing knowledge in support of the mission? Shared vision emerges as the people, processes and technology come together during the ARFORGEN process and mission planning takes place. The development of this shared vision takes place during the command and control (C2) activities of planning, preparing, executing and continually assessing the operation so commanders can understand, visualize, describe and direct military operations (FM 5-0). As Senge points out, the majority of organizational change effort is in the changing of the people and their attitude toward proactively sharing information and practicing good personal and team knowledge management. Knowledge management will not be embraced without a shared vision of its value in support of warfighting functions. Teaming is at the grass roots of effective KM.

Team learning

Peter Senge states that team learning only occurs when individuals are listening and communicating skillfully with one another. During military operations, commanders continually assess the situation, modify plans and orders, and provide guidance to subordinates to accomplish the mission. Teams of specialized staff and decision makers collaborate at boards, bureaus, cells, centers and working groups (B2C2WGs), and dialogue with higher, subordinate, and adjacent commanders and their staffs. Learning and sharing information becomes part of the process. The B2C2WG inputs and outputs developed during the assessment process, and the teaming that takes place, should emerge as part of the KM strategy.

Systems thinking

The last discipline discussed by Peter Senge is “systems thinking” and is probably the most difficult of the five disciplines for KMOs to grasp quickly. In fact, it takes systems thinking to develop a mental model of knowledge flow. Not everyone is comfortable in knowledge mapping and the modeling of business functions, their many activities and workflows, and processes needed to produce outputs used by other teams. As part of the knowledge mapping process, the KMO analyzes all the discrete collaborative events that occur with the battle rhythm to develop a systems-wide view.

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To the knowledge manager, this systems-wide view is much like the synchronization matrix is to the commander and their staff. The KMO needs to know how these discrete activities within the battle rhythm influence each other and how a delay or failure in one activity affects others. “Understanding the delays in single and converging processes is the key to system thinking,” said Senge. This systems thinking is also important to decision making during execution. This is a good time to review FM 5-0, Chapter 5, on the execution of combat operations.

There are other approaches to developing a KM strategy. In their research paper [Choosing Your Knowledge Management Strategy](#), Knox Haggie and John Kingston survey and describe different methods of classifying knowledge. Knowledge can be classified by end results (Treacy & Wiersema, 1993), by knowledge type (Nonaka & Takeuchi, 1995), or by business process (Kark Wiig & APQC, 1997). In 2001 Derek Binney developed a KM Spectrum based on KM activities grouped into six categories and their associated activities:

- Transactional
- Analytical
- Asset management
- Process
- Developmental
- Innovation and creation

Haggie and Kingston illustrate how enabling technologies are mapped to Binney’s KM Spectrum and follow with an engineering approach to the KM Spectrum. The authors’ “synthesized approach” takes into account seven “factors influencing the selection of a KM Strategy.” ([View a modification of Binney’s “table of enabling technologies,” reflecting the technologies applicable to an Army KM environment.](#)) The authors reinforce their “synthesized approach” with a short case study to illustrate their approach. In keeping with Peter Senge’s “personal mastery” discipline, the Haggie and Kingston paper is worth a read.

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Thunder on the Missouri

Mr. Jim L. Claunch, Knowledge Management Advisor

To the outside observer, it really wasn't much of anything. Just one phone call, among thousands, that passes through Fort Leavenworth every day. But, to one infantry brigade about to deploy, it would mean a new capability and unanticipated effects for the Army.

The morning of 6 August 2010, I received a phone call from the Signal Officer of an infantry brigade on its way to Afghanistan. He had just been assigned an Infantry second lieutenant and a Signal sergeant to standup the brigade's KM Section, just weeks prior to deployment.



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With the BCKS trainers temporarily stood-down, and unsure how to proceed, I decided to start a discussion on KMNet: "Standing Up a Bde KM Section Just Prior to Deployment." I initiated the discussion at 10:17 that morning, and the first reply came from Fort Riley...18 minutes later! By 4:37 that afternoon (six hours and 20 minutes after the initial post), there were seven other replies from KM experts at Fort Bragg, Fort Hood, Fort Polk, Fort Leavenworth, and Afghanistan.

With thousands of Soldiers on Army professional forums, this may seem like a weak response. But, in these eight postings, KM experts from across the Army provided this brigade with recommendations on standing up a KM Section, suggestions for rapid KM training, contacts with KM trainers and experts, and a connection to a deployed Knowledge Management Officer (KMO). But that was only the most visible result. In that same six hours and 20 minutes, through e-mail and phone calls, that Signal Officer also received links to KM guides and SOPs, KM training at Fort Drum, an operational KM AAR, and a paper on developing a KM strategy. In little more than six hours, the brigade had gone from "What do I do now?" to "Now, I know where to start."

In the next three days, another six postings to the original discussion, two phone calls, and 32 e-mails (from Fort Irwin, Fort Bragg, Fort Leavenworth, Fort Hood, Fort Polk, and Afghanistan) provided the brigade with: additional links to online training; training POCs at Fort Leavenworth and Fort Drum; and a CGSC student paper on KM at the brigade and local training. With this, the brigade had enough information to begin planning their KM operations, and I had enough information to design training events for the new KM Section.

But, as they say on the loud commercials - "That's not all!" While attempting to help the brigade with KM training, officers at the National Training Center (NTC) discovered that the information sent to the brigade was useful to them, which they are now integrating in the NTC media operations scenario. Officers at Fort Bragg also found that those same documents would be useful to them for future training events.

With the combined knowledge of more than a dozen KM practitioners around the globe, the brigade came to Fort Leavenworth for "Rapid KM Training." This training also was based on the recommendations developed on KM Net, and included a Defense Connect Online (DCO) session, during which the brigade KMO and Signal Officer were able to discuss the practical aspects of standing-up a brigade KMO Section. They also spent considerable time discussing these problems with the KMO of the division they would be attached to. And, as an unintended consequence, representatives from a Special Forces Group made initial contact with BCKS, unaware that BCKS already had KM support available to them on their installation.

By the time the brigade left Fort Leavenworth and their one day of Rapid KM Training, it was ready to stand-up its KM Section and to begin planning KM operations. Officers at the NTC and Fort Bragg found the information useful to their training, and a Special Forces Group became aware of local support they hadn't known about. BCKS had new-found experience in conducting training in support of a brigade about to be deployed...all from 94 words on KMNet.

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KM Technology Tips 'n' Tricks: SharePoint: Using Excel in your Dashboards

David A. Foreman, SharePoint Administrator (Contractor)

We've all heard the phrase "A picture is worth a thousand words." It is the main reason we use dashboards: to provide a snapshot for management concerning the overall health of the organization.

Two of the challenges in designing dashboards are the limited space to present information and the limitations with SharePoint's Key Performance Indicators (KPI). By using the business graphics in Microsoft Excel, you can address both of these challenges simultaneously: use page real-estate effectively and provide a holistic view of an organization.

To use Excel's services, you must first do a little pre-work. Contact the Administrator of your SharePoint farm (grouping of SharePoint servers) with the reporting website document repository URL. Ask them to set it up for Excel services for that document repository. Although SharePoint offers many different and robust ways to present and graph data, this article discusses how to have multiple graphs in one spreadsheet with different data points and the presentation of that data in one frame.

In Excel, there are two ways to create navigation: create a menu on the first page of your spreadsheet and then navigate to various sections of your workbook, or use "Named Ranges." Named Ranges can also be used for data. In SharePoint, you can setup your Excel web part to display those name ranges in a drop down menu. The following steps are necessary to perform this action:

1. In Excel go to the **Formulas** tab.
2. Select "Name Manager." Within this tab, you can either create **new name** ranges or manage existing ones. For a "New" entry, select "New" and Excel will present a new window named "New Name." Enter a valid name to save the worksheet reference. Another option is to right click on a group of cells and select "**Name Range**."
3. To save the changes, select **Publish** by clicking the **Office Button – highlight publish** and choose **Excel services**. (Editor's note: As an alternative, you can skip this step and save the document to your local hard drive and then upload it into the SharePoint document library (see Step 4)).
 - Type the URL of your reporting services Document Directory, adding the name of the Excel file to the end.
 - Make sure to save it as an XLSX file type.
 - Click the **Excel Services Options** button just under the file name.
 - On the **Show** tab, you have the flexibility to choose the entire workbook, a single sheet, or items in the workbook (charts and named items). The recommended option is to choose the entire workbook.
 - Click **OK** on the Excel Services Options popup window.
 - Click **Save** on the Save As popup window.

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4. Editors Note: This is an alternate way to import the spreadsheet into SharePoint.
 - Save the workbook in Excel as an XSLX file (Click the Office button, then select Save as, then the option “Excel Workbook”)
 - Upload the workbook to the website document library URL. Remember, in order for this to work this document library must have the Excel Reporting Services option set for it by the SharePoint site administrator.
5. In SharePoint:
 - Add the **Excel Web Access** web part to your web page.
 - Click **Edit/Modify Shared Web Part** to display the tool bar settings.
 - Under the Workbook Display section set the Workbook to point to the url of the workbook (uploaded in Step 3 or 4)
 - Under the **Toolbar and Title Bar** section choose **Navigation Only** for the toolbar type.
 - In the **Toolbar Menu Commands** section check **Named Item Drop-Down List**.
 - Click **OK** to apply the changes.
6. After you exit edit mode on the web part you will see the spreadsheet with the dropdown menu of named ranges on the upper right. By default it will be labeled as “View:” next to the dropdown menu. By selecting a named range from the dropdown menu you can control the content displayed in the spreadsheet based on the named ranges you set up in Excel.
7. **“Named Item Drop down List”**.

One final suggestion: When setting this up, remember that you have a known frame size you are working with. It will look a lot better if you set up your graphs and named data ranges to fit into the same frame.

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What's Hot in the Professional Forums!

[S3-XO NET-Toxic Followers](#)

Toxic leaders are entrenched across the Army and can have an adverse effect on the units they inhabit. But what about those Soldiers affected by it? Can the Soldiers themselves prevent it? Can subordinate leaders compensate for it?

Just as any leader has the ultimate choice of what kind of leadership philosophy that he/she plans on using during their tenure, leaders have the option of how they receive and process the information. This includes how they react to the way the information was relayed to them. When leaders hold on to the toxic style of delivery, leaders tend to replicate the same into messages down to subordinates. The trick is to learn how to let go, even ignore, the delivery of these leaders and inform Soldiers in such a way as not to proliferate the toxic environment.



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[Army Safety NET – Influencing Soldiers’ “Off-Duty” behavior](#)

Command Sergeant Major of the US Army Combat Readiness/Safety Center, CSM Mike Eyer, shares his thoughts on reducing Soldier accidents and injuries.

“As NCOs, the direct line we have to our Soldiers allows us to get to know them on a personal level and positively influence their off-duty behavior. The key to this relationship is communication. Those of you familiar with “Oak Tree Counseling” know the five or so minutes a leader spends one-on-one with his or her Soldiers is often all it takes to get them thinking about risk management during their time off. It’s this mindset—that off-duty risks can be managed with the same precision as a military operation—that will save lives in the end”.

[Leader NET – Fen’s Thoughts](#)

“Fen’s Thoughts” is a forum member’s blog that depicts real world experiences combined and contrasted with Army Doctrine that focuses on Military Leadership and Leader Development. This blog zeros in on the issues faced by deployed Soldiers and their leaders, and attempts to guide Army leaders into understanding why Soldiers react in certain ways, and how understanding this can help them become more efficient at assisting them.

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Index of Links

Links Disclaimer: *The appearance of hyperlinks in this newsletter does not constitute endorsement by the Defense Department, U.S. Army or U.S. Army Command Arms Center of those websites or the information, products or services contained therein. Such links are provided consistent with the stated purpose of this DoD website. Some NECs (Network Enterprise Centers), may have some sites linked from this publication restricted.*

So You’re Going To Be A KMO: <http://usacac.army.mil/cac2/bcks/Connected/ConnectedSummer2010.html#KMO>

CAVNET2 Afghan SharePoint site: <https://moss.hood.army.mil/units/1CD/tactools/Afghan/default.aspx>

CAVNET-AKO Afghan site: <https://www.us.army.mil/suite/page/633290>

CAVNET2 Iraq SharePoint site: <https://moss.hood.army.mil/units/1CD/tactools/iraq/default.aspx>

CAVNET-AKO Iraq site : <https://www.us.army.mil/suite/page/247011>

A research paper from Knox Haggie and John Kingston [Choosing Your Knowledge Management Strategy S3-XO NET-Toxic Followers](#)

[Army Safety NET – Influencing Soldiers’ “Off-Duty” behavior](#)

[Leader NET – Fen’s Thoughts](#)

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Call for Articles

Are you a KM professional or someone who's just getting involved with KM? Would you like to share a KM experience, Best Practice or TTP with other Soldiers? Submit an article for publication in Connected™. KM is about sharing and exchanging knowledge, and Connected™ can serve as your platform for doing that. This is an opportunity for you to discuss your experience with KM and how it helped you or your unit save lives, time or money; prevent injuries; or improve training, a process or a procedure. Many people will have the opportunity to read your article in Connected™ and it will also be preserved in archived copies of Connected™ that are available online. Whether you'd like to contribute an article or suggest a topic for Connected™ to cover, we hope to hear from you soon at MCCOEWebmaster@conus.army.mil.

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