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Intranets and Content Management

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Another ten intranet success factors

A couple of years ago I developed a set of ten intranet success factors that ended up being used as a give-away on the UKOLUG stand at Online Information 2003. In rebuilding the Intranet Focus web site (which should look different by the time you read this) I thought it was time to review and revise the success factors, so here is the 2005 version. The main difference is really that the initial set were for start-up situations, and this set are for more mature (in relative terms) intranets. Comments would be much appreciated.

1. Document the intranet strategy
Develop and document an intranet strategy, based on a consideration of the requirements and balance of information/content, technology and governance. This strategy has to be aligned with the overall strategy of the organisation and other relevant applications, such as records and document management, client/contact management and digital asset management. An important element of the strategy is defining acceptable measures of performance. A marketing strategy also needs to be included.
2. Understand and support content contribution
Information quality in an intranet is essential, and yet most organisations implement a distributed approach to content contribution without really understanding the issues around content management. Invariably intranet content contribution is not included in job descriptions or valued by managers, and as a result gets low priority. The old adage 'garbage in – garbage out' certainly applies to intranet content!
3. Develop and enforce standards, and encourage the adoption of good practice
There should be standards for intranets, especially where the organisation has a number of different intranets within some form of common architecture. These might typically include the basic layout of pages, default arrangements for lists, and conformance to accessibility standards. There have to be enforceable sanctions for non-conformance. A standard without such enforcement is not a standard, just a dream. In addition there will be good practice that may vary from department to department and from time to time. This good practice should be collated and reviewed.
4. Manage metadata
Content authors may not have the skills and expertise needed to add metadata. Metadata is not just about 'keywords'. Structural metadata describes the information architecture of the document; content metadata provides a way of identifying documents that may contain relevant subject information; descriptive metadata enables the type of document to be identified. And finally administrative metadata deals information such as the person and department owing the document, the date when the document would be checked for relevancy, and the language of the document. The effort involved in developing metadata schemes is always underestimated.
5. Provide effective search functionality
Users have to trust the search functionality so that they feel totally confident that either they have found all relevant information, or that information is not on the intranet. Not being sure one way or the other is not an acceptable situation. Implementing a good search solution will depend on a robust metadata environment, understanding how users will search for specific types of content, and considering the extent to which the intranet search engine should also search other repositories, such as records and document management applications.
6. Provide access to the business environment
Make sure that the intranet provides access to information from external sources, such as business and market information. It is easy to be so focused on the provision of internal information that access to external information is overlooked. In today's competitive business environment monitoring the external business environment is of the highest importance.
7. Undertake regular usability testing
Usability testing should be carried out at all stages of the life of an intranet, and there should be a range of feedback channels to ensure that the content and the information architecture continue to meet the expectations of contributors, users and stakeholders. Carry out regular surveys to obtain success stories that can be used to market the benefits of the intranet, and also identify examples

of where the intranet has failed to meet expectations. Do not make the assumption that because employees know enough about the structure and operations of the company that an information architecture based on organisational structure is all that is required.

8. Support collaborative working
Although in theory intranets are supposed to support collaborative working little attention is usually paid as to what the real needs of the organisation are for collaborative working. It could be the support of project teams, of communities or practice, of extranet relationships with external organisations or for the assembly of complex, multi-author documents. Each of these may require other web technologies to be integrated with the intranet, such as wikis, blogs, instant messaging and discussion rooms.
9. Use workflow only where there is business benefit
All too often companies implement workflow to try to control inappropriate content being publishing onto an intranet. Such breaches of personal responsibility should be dealt with through other channels. In implementing workflow little attention is usually paid to the impact on the email in-boxes, time available, and subject expertise of the reviewer/approver.
10. Quantify content migration issues
Whether it is the large-scale migration of content into a CMS or the revision of sections of an intranet, the work involved is invariably underestimated. There is no substitute for a comprehensive content audit to understand what does need to be moved, and how, and what is now Redundant, Obsolete or Trivial (ROT).

Reference Management

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Capturing notes and quotes

A common complaint about reference software tools is that they do not deal adequately with notes and quotes beyond adding keywords or abstracts. Some of the leaders in the market which do help in this area are provided below – purely in alphabetical order – which can be utilised with reference software

* *Devonthink* is a notepad, outliner, scrapbook manager, information manager, freeform database, archive, bookmark manager and image database with options for classifying and searching different reference types. <http://www.devon-technologies.com/products/devonthink/overview.php>

* *FileMaker Pro* which allows you to cross reference notes relationally with your bibliography and includes the ability to load the database onto the web. http://www.filemaker.com/products/fm_home.html

* *Hog Bay notebook*, for Apple's new Mac OS X operating system, lets you record and organize your ideas and relate concepts together. It is also scalable with numerous output options. http://www.hogbaysoftware.com/products/hog_bay_notebook.php

* *Knoesis* offers three products to help manage the note taking and reference process including the lite and professional index. The professional card index has the ability to share bibliographic information with programs like EndNote <http://www.knoesis.com>

* *Notelens*, for Windows, is a note taking tool which also integrates with Microsoft Outlook. It is based on free forms and allow the organising of your notes <http://www.windsorinterfaces.com/notelens.shtml>

* *Scholars Aid* keeps notes and references together and allows interaction with Z39.50 sites. <http://www.scholarsaid.com/intro.html>

Bookmark Management systems

There are many companies around which will manage your bookmarks but here is one which is free to join.

* *Connotea* is a bookmark management system which keeps links to articles read and the websites used so that you can find them again and are available from any terminal. It also collects the bibliographic information for the article or book that is being linked to from certain web sites. These include PubMed and Amazon. You can also add comments to your references to make them more meaningful. These references can then be exported into Endnote or other packages for future use. <http://www.connotea.org>

Research Support Tool

On a slightly different note is the *Open Journal Systems* which is a journal management and publishing system which seeks to improve access to research through a Public Knowledge Project. It assists with every stage of the referred publishing process from submission to online publication. In particular it has a

* Research Support Tool which link the study researchers are consulting to related research, Web sites, and databases. The website provides a demonstration which is quite useful. <http://pkp.ubc.ca/demos/rsttour/index.html>