

Many organisations are attempting to clarify the relationship between the corporate intranet, and their document/records management system.

While this is a broader issue of information management with an organisation, there are some short-term activities that can be taken to create a working relationship between these two platforms.

This briefing outlines a simple scenario in which the intranet helps staff find key corporate information, while the documents accessed are stored in the document/records management system.

Usage scenario

The following scenario outlines one of the typical ways an intranet is used:

A staff member browses into the HR section, and then to the 'HR policies' page. Scanning through the list of documents available, the leave policy is selected, and the PDF opens up in Acrobat Reader.

This is a very common scenario, but more could be happening behind the scenes than is apparent to the end user:

- The list of policies in the HR section is actually dynamically created, generated by asking the records management system to return a list of all the documents stored in a particular folder.
- The list returned is then formatted, and presented as a simple list of document titles (as links), along with supporting descriptions and other details.
- Clicking on a document link invisibly requests the file from the records management system, which is then automatically opened up in the user's copy of Acrobat Reader.

In this way, the intranet provides a simple mechanism for browsing to required information, while the files themselves are stored in the records management system. What is happening 'under the hood' is then invisible to the end user.

Benefits of this approach

Implementing a solution as outlined in the scenario provides a number of direct benefits:

- The intranet provides a simple and user-friendly way of finding required information, without having to expose staff to the complexities of the records management system.
- Information is accessed from a single location, regardless of whether it is provided as a web page, or as a file from the records management system.
- Storing the documents themselves in the records management system provides all the benefits relating to better document management, security, versioning, and recordkeeping compliance.
- Providing simpler access to information via the intranet demonstrates the value of the records management system, by allowing information to be easily *retrieved* from the system, and not just stored for recordkeeping reasons.

Taking this approach therefore delivers a 'win-win' outcome that benefits the intranet, the records management system, as well as the end user.

Making it happen

Implementing this solution can be quite straightforward. Almost all of the document/records management systems provide a well-developed (and well documented) API for accessing files within the repository.

A day (or two) of programming, in a language of your choice, is generally sufficient to create the requests to return a list of documents within the records management system.

As long as the records management system is then configured (and licensed) to return the documents directly to the user for display in Acrobat Reader, the job is then done.

Better yet, a small (but increasing) number of content management systems provide this capability built-in, without requiring additional development or customisation.