

The Secret Diary of an Information Manager Aged 29 and 3/4

Or Implementing the Right Information Solution at Pinsents – not as exciting as a secret diary but possibly a more arresting title! – Vicky Fordham shares with us her varied experiences of implementing library management systems

Introduction

In five years at Pinsents I have seen three different library management systems. Our current system, OLIB7, has been in situ since September 2002 and for the most part is working well. But why have we had three in such a short space of time? Why did we choose OLIB7? And is implementing a new system really all that bad?

BV (Before Vicky!)

Derived from an initiative of the old LRG (Legal Resources Group was a national association for leading UK firms including Osborne Clarke, Dickinson Dees and McGrigor Donald), Pinsents had a shared library catalogue known as ALIS. At Pinsents the catalogue ran on Lotus Notes to complement the working environment, although the other LRG members ran it on BRS. Pinsents experienced problems the other firms did not as a result of constantly reformatting the catalogue data to fit in a Lotus Notes environment. The result was a catalogue with inconsistent information, offering limited functionality and containing the holdings of all LRG libraries.

September 1999

My first week at Pinsents brought my first challenge – implementation of a new library management system. The decision to use NOTEbookS, a Lotus Notes based system, had been taken before I joined but the hard work was just beginning!

Working with information from the ALIS catalogue alongside a manual journal system we set about the process of implementing NOTEbookS. We started from scratch having never used an automated journal system before and, in many ways, this was easier than amending existing data as we had a blank canvas to work with. Amending all

the catalogue records was a different story – every single record in the catalogue (we had approximately 20,000 records at that time!) had to be manually checked and “tidied up” – we got through a lot of cakes and chocolate treats in the process!

By the end of 1999 after much hard work by the Information Services (IS) team the NOTEbookS system was fully operational and serving its purpose – greater stock control and better financial planning.

November 2001

After the merger of Pinsent Curtis and Biddle & Co in February 2001 a firm-wide IT decision was made to move away from Lotus Notes and go forward solely with Microsoft. Technical support for Lotus Notes would be phased out while the firm transferred its email, databases and web access to Microsoft. And so the hunt for a new library management system commenced.

Having been through the process of automating the library and implementing a library management system once, it was easy to list our requirements based on the shortcomings of our existing system. The list included:

- web enabled end user access
- adaptability of look and feel
- proven success within similar environment
- financial reporting and analysis
- development potential
- Microsoft SQL platform

We wanted our new system to be capable of continual development to ensure it would remain a workable solution. We needed one product to cover all aspects of library management, from serials control to financial management with a web enabled front end to fit seamlessly with our intranet.

We also required a solution with proven success in similar organisations (multi-site libraries in a legal environment), a criteria we didn't set when choosing NOTEbookS because we felt limited to finding a Lotus Notes solution at that stage.

December 2001

During the initial stages of research it became apparent that we would not be able to find a library management system running on an SQL platform. Any firm that has gone through the process of choosing and implementing a new system will know that you will rarely find a perfect fit. So armed with an amended brief, I went to Olympia to see what the market had to offer. I narrowed my search down to two possible products – both on an ORACLE platform, but otherwise matching the brief I had set.

My visit to Olympia, coupled with investigation into other law firm library management solutions and input from Pinsents IT department, enabled me to make an informed decision about the right solution for Pinsents. OLIB7 from Fretwell Downing Informatics (FDI) seemed the most suitable product and, with other law firms already using OLIB7, it was the obvious choice to replace NOTEbookS.

We were looking at three OLIB7 modules, with a view to possible future expansion into others:

1. Catalogue
2. Funds & Acquisitions
3. Serials

Of the OLIB7 package we purchased for Pinsents, the Funds & Acquisitions module offered the most potential benefit for us. Financial reporting and management had never been part of our NOTEbookS package. We needed a system which gave us full control over the library budget and accuracy in analysing spending patterns throughout the firm. With the Pinsents' Chosen Markets strategy already in place it was vital the library collections in each office reflected the needs of the lawyers working there. We also needed a system which allowed us to manipulate information relating to spending patterns either by office, practice group or Chosen Market Sector.

February 2002

Deciding on the right solution was only the beginning. Before looking forward to the implementation process it was essential to gain IT support for the product and financial backing from the Board.

IT support is imperative in any new IS venture, particularly when there is no dedicated systems librarian and the venture is so IT-intensive. Our IT team would be key to helping to maintain the system and trouble-shoot any technical problems. The obstacle to IT buy-in was ORACLE. Most library management systems are based on an ORACLE platform. As we had no in-house ORACLE experience there was a lot of persuading to be done. Our ability to outsource technical support to FDI was a key factor in maintaining IT support.

Support from the Board was also important. The decision to move away from Lotus Notes was the main reason for choosing a new library management system. As

this was a firm-wide decision, cost and time were on our side and backing from the Board was quick to follow.

June 2002

By mid 2002, we had chosen our new library management system, obtained Board backing, won support from IT and were ready to sign contracts with FDI.

Anyone who has implemented a library management system will know that the process is nowhere near as straightforward as they might wish. The summer months of June, July and August were a haze of project meetings, data conversion, data mapping, training sessions, site visits and web view configuration!

At the initial project kick-off meeting, we agreed timescales for implementing each of the OLIB7 modules we had purchased. We managed to stick to a tight schedule. Before the new trainee solicitors started in September the catalogue was live, by the end of November the Serials module was up and running, and in January we began using Funds & Acquisitions.

August 2002

The key lesson we learned when implementing NOTEbookS was that training was hugely important to success. It was crucial that each IS team member was trained on all relevant OLIB modules to ensure their confidence in the system. Not wanting to leave the libraries without staff meant that we could not get the whole team together for one training session. Instead we organised two training sessions for each module – one in our Birmingham office and one in FDI's training centre in Sheffield. This format worked well, allowing us to tailor each session to suit the people attending.

We were advised to hold all the training sessions before implementation of the first OLIB module. With the benefit of hindsight I would strongly recommend a training schedule based around implementation of each individual module. I would also hold each session off-site as these were by far the most successful. The whole process took over four months, so by the time we were ready to implement the Funds & Acquisitions module in January it was difficult to remember what we had learned during a training session back in August.

Realising that we should have taken a different approach meant that we initially took full advantage of the FDI support desk – it wasn't long before the support desk could recognise our voices from a simple "hello".

September 2002 – January 2003

September through to January was demanding for the whole team but we succeeded in implementing each module on schedule. With such tight deadlines there was some hair pulling, wrinkled brows and gritted teeth

Vicky Fordham

on both sides. Developing good working relationships with the implementation team at FDI was a big help. That relationship has remained successful – both first and second line support have been very good sorting out the “niggles” that arise after a major implementation programme, although inevitable changes in personnel at FDI have meant delays on occasions. The FDI Help desk still recognise most of the Pinsents IS team by the sound of their voices!

April 2003

While the Serials and Catalogue modules remained successful after implementation, the Funds & Acquisitions module was temporarily put on hold in April 2003. We had implemented the module in January using the final quarter of the financial year as a dry run to tease out any problems before starting with a new financial year's data. We did identify some problems with the application of Funds & Acquisitions in Pinsents, based around the way we organise our budget. We have also experienced complications in other OLIB modules because we have not been able to use the Funds & Acquisitions module as we initially required.

We bought OLIB7 to achieve accurate financial management so it was disappointing to have to stop using that particular module. However, it has been useful to discuss these problems with other law firms who use OLIB7 and work towards a common solution.

May 2003

With the onset of the new financial year and a new look IS budget reflecting the sector-based Chosen Markets strategy, but without a fully workable solution to the Funds & Acquisition problems from FDI, we were forced to look outside OLIB7 to keep our acquisitions and budget in check. We hope to go back to OLIB7 for financial management of Information Services when the issues have been resolved, hopefully by the start of FY 04/05.

November 2003

We have been using OLIB7 for over a year now. There are still many facets of the library management system we

have yet to utilise fully. We are looking at the claims and looseleaf elements of the Serials module – the looseleaf part was specifically designed for the legal market and has been successfully implemented by some law firms. We look forward to a solution from FDI on the Funds & Acquisitions module – future development is expected to ensure the module can work for a wider range of organisations. There is also the prospect of implementing an electronic issue and reservations system using the Circulation module, which would certainly help with stock control issues.

Conclusions

To answer the questions I posed at the start of this article, why did we have three different library management systems in a short space of time?

As is often the case with a dynamic law firm like Pinsents, external factors beyond the control of the Information Services team meant that our systems needed to change in line with firm-wide changes in policy. While we used three systems in a short space of time, each system proved its worth, playing an important part in developing the IS product at Pinsents.

Why did we choose OLIB7?

We wanted to match the requirements for Information Services with a library management system. After investigating the area both within the firm and in the marketplace, we concluded that OLIB7 was the best solution for us in terms of price, usability and functionality.

Is implementing a library management system really all that bad?

It is not without its headaches. Contrary to an article I read recently where librarians topped a list of the UK's least stressful jobs (!), it is one of the many projects you will undertake which will put pressure on the Information Services team to deliver. And have you dreaming about data mapping in the process! Whether switching from one system to another, or moving from a manual to an electronic system there's not a librarian out there who will tell you it's easy. However, long-term, the business benefits outweigh the problems you may experience during the implementation. It's both an exciting and daunting time, but with careful planning, teamwork and good old fashioned hard work you will be able to deliver.

Vicky graduated from University of Central England in 1995 with a 2 : 1 in Information Studies. She went straight to Eversheds in Birmingham where she worked for four years. In September 1999 she moved to Pinsents as Information Manager in Birmingham. She is now Head of Information Services at Pinsents, still based in Birmingham but with regular visits to the firm's other offices.