

A Template for Knowledge Management Success

INMAGIC Presto. Success Story

PAUL MARTIN LAW LIBRARY CHALLENGES

- Digitization
- Findability
- Time Savings
- Security and Permissions Management

“Because of Inmagic Presto, the Library single-handedly transformed the way the University’s policies are produced and managed. A polished, finished product was ‘just done’ seamlessly, with zero disruption and without anxiety.”

ANNETTE L. DEMERS,
Law Librarian

University of Windsor, Paul Martin Law Library

The University of Windsor in Ontario, Canada is a comprehensive university across the river from Detroit in the U.S. The Law School itself graduates around 700 law students annually. This includes 75 students in a dual JD program, which allows students to take law school for four years between the University of Windsor and the University of Detroit Mercy. When they graduate, they have two law degrees; one from Canada and one from the United States. Law Librarian Annette L. Demers reports directly to the Dean of the Law School, and her budget is independent of the law school and the university library, which is quite a unique situation, and a good foundation for pursuing goals and delivering solutions that serve the best interests of both. She stated that the library’s mission is “always to support the teaching, learning and the research that goes on in our law school”.

Over the years, the Law Library and other departments within the University had followed best practices by gathering decades’ worth of information and content, including institution-wide policies and historical law school documentation. However, there were no policies covering organization of those materials, nor were there any templates for capturing metadata—meaning they were essentially undiscoverable. To Annette Demers, what at first appeared to be a document management challenge was actually a knowledge management opportunity.

Law School materials were exclusively in print until about 10 years ago, when the Library undertook a significant digitization project. However, answering questions about the origins of particular policies at the Law School level still meant that the library staff of three had to read through PDFs and use “find” to search for specifics. Even though the team took

the initiative to go through the collection and create an Excel file that tied a policy to its acceptance date by Faculty Council, findability and document retrieval remained very challenging. Ms. Demers and her team systematically applied metadata to the records, but the limitations of Word, Excel, and Explorer led to a dead end. Per Ms. Demers, this was the “jumping off point after many years of trying to harness our valuable content.” She was asked to deliver a platform that could hold campus-wide policies, not just Law School documentation, and after detailed due diligence involving staff from the University’s IT department and the Web Design group, Inmagic Presto was approved by a 15-member committee.

FINDABLE DOCUMENTS, SEARCHABLE ANALYSIS

Per Law Librarian Annette Demers, Inmagic Presto “gives us a home for 30 years of print materials that had to be digitized, and 20 years of born-digital materials.” To illustrate the system’s power as a knowledge management platform, she stated that “there is meaning to be derived from Faculty Council Minutes, for example. It takes a human to go through and read often cryptic notes, and articulate them in a form that others can use. The content must be translated into knowledge that is findable by others—we needed a system that puts both the document and our analysis into a findable form.” The other applications they reviewed couldn’t match Inmagic Presto’s flexibility: with Presto they could build the fields within the databases based on the information-seeking habits of users, as well as the format of the documents themselves. “With the other systems we looked at, you could probably dump the PDFs into a database and make them searchable, but with Inmagic Presto we can specify ‘this document

originated from the Senate Secretariat, and it also captures this other work'. The double benefit of Presto is being able to customize the fields, and customize the searches." And unlike the other systems, Presto allows them to easily build a 'public face,' the University's website now has a 'Policies' link which takes any member of the public right to the campus policies database.

To date, the Library team has built three Inmagic Presto databases:

- Faculty Council Minutes (e.g., the business records of the Faculty of Law)
- University of Windsor Policies Database (the publicly available central database of campus-wide policies)
- Documentation of the Law School's history—events, faculty photos, etc., that were virtually unfindable in the digital formats they had, and the earlier print format

Being able to batch load and tag records saves considerable time, and the resulting databases enhance both the visibility and value of the work done by the Law Library staff, and the collection. When the 50-year anniversary of the Law School was celebrated, the Communications Officer put together a special book and needed access to the school's archives and all their photos. Because this was before the Inmagic Presto implementation, it was necessary to sit at a desk and go through everything manually. Now, source materials are all digitized, mostly tagged, and quickly and easily browsable, including by a tree structure which enables smooth navigation. Pulling together an analogous 60-year anniversary project will be a breeze.

CAMPUS-WIDE INFLUENCE

During the implementation, Library staff built the templates and the databases simultaneously—and then built a process around that for writing policy, university-wide. Previously, only two of the University's governing bodies were using a template when organizing content; offering databases to house all documents and providing templates for tagging them allowed the Law Library to build and propagate best practices campus-wide, demonstrating influence beyond the Law School.

University faculty needed solid assurances about the security of their information. Inmagic Presto allowed Ms. Demers' team to build workflows and access around granular user permissions; this was key to giving faculty confidence in the system.

As part of a campus-wide project, the Library has trained about a dozen staff members around the University; the Provost's office, Human Resources, Administration and other major departments all have an administrative delegate. Each delegate has been trained on Inmagic Presto, assigned the appropriate permissions, and tasked with converting policies into the relevant templates and uploading them.

The Head of the University Secretariat and her staff are among the most frequent users and advocates of the system; they leverage it to capture and manage Senate Bylaws and Board of Governors Bylaws. The University Provost is an active advocate and champion as well. Says Ms. Demers, "Most users really like Presto and quickly get used to the interface. When there have been suggestions for any small changes, Library staff have been able to address 99% of concerns, sometimes relying on Lucidea's nimble and responsive Client Services Team."

DOWNSTREAM PROJECTS

The system is so popular, that staff around the University will be discussing a "random problem they're up against" and someone will say "We could build a solution to that with Inmagic Presto!" For example, the Law School has a religious accommodation policy which dictates that if a student has a conflict between a religious holiday and a class, they are entitled to receive a video recording of the classroom lecture. It's challenging to manage the program since the files are large, and currently students must sit at specific computers with headsets in order to watch the videos. Inmagic Presto could be the answer to that challenge, and enable on-demand viewing using the students' own laptops. The Law Library itself plans to organize and add supplementary multimedia materials to listed resources on the library website because Inmagic Presto accommodates all file types, allowing library staff to add value and context to content.

Ms. Demers praises Lucidea for the team's responsiveness, consistency, and very smooth handoffs so that when she calls, she doesn't have to reinvent the wheel. She says, "We don't build databases for a living and we will never be experts. Lucidea's Client Services team members offer prompt assistance and always set us on the right path. That's a real differentiator."

With Inmagic Presto, the Paul Martin Law Library has delivered to the University a template for knowledge management success, extending their influence beyond the Law School itself.

ABOUT LUCIDEA

Lucidea is the premier knowledge management software company, helping people navigate the ever expanding universe of information, turning it into actionable knowledge. We achieve this by providing tools that accelerate access to knowledge resources, while simplifying their management.

To learn more about Inmagic Presto and how it can help solve your knowledge management challenges, visit lucidea.com/inmagic-presto.

CONTACT LUCIDEA

☎ 1-604-278-6717 ✉ sales@lucidea.com 🌐 www.lucidea.com