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Product Review
Research Monitor

Research Monitor is a piece of software which can fulfil a number of functions. Developed by Priory Solutions and marketed by their business partner 7Side, it has been on the market since 2005 and is used in a number of major law firms. The tasks which Research Monitor can perform fall into two main categories: improving access to databases and tracking database usage. Within these broad categories it can be used for an impressive array of functions, including controlling access to online services with IP authentication, or as a password management system. In terms of tracking database usage, it can deal with charge-back issues – by recording searches and validating client matter numbers. Summary reports on database usage can be used for budgeting purposes, but reports can also be set up to provide a high level of detail, which can be invaluable in improving database training courses.

We have subscribed to Research Monitor at Berwin Leighton Paisner for almost a year. This product review is based on the usage we have made of it in this time. We have not yet had time to explore the full possibilities of the service and have concentrated on three aspects:

(1) Looking at overall database usage patterns;
(2) Using the password control tool, and
(3) Looking in detail at research patterns as a way of improving training courses.

This article will discuss these aspects of the software, and it should be borne in mind that this is by no means a review of all the system's capabilities.

1) Looking at overall database usage patterns

This was the reason for our initial interest in Research Monitor and the system allows the user to run reports based on a large number of criteria. We are currently monitoring usage of our main legal databases, some business sources and a number of online journals. Adding additional titles is straightforward, although for some very detailed usage reports (e.g. looking at what is being searched within the database), Priory Solutions would need to set this up, or train your IT staff to do it.

Reports can be downloaded in Word to produce a list of who has accessed a particular database and when. This can be useful for checking on a relatively little used online journal. Once one starts looking at the key legal databases however, the alternative way of displaying the data – via Excel pivot table reports – is much better at handling the large amounts of data. A web-based reporting tool, planned for release within the next eighteen months, should allow even greater flexibility.

The user has an impressive degree of control over the reports which can be run. One can compare usage of various databases over a period and display the results either by number of searches carried out or by number of documents accessed. The advantages for budgeting purposes are obvious. It is an excellent way of finding out if any databases or online journals are not being used – neatly side-stepping the problem of lawyers who will say that everything is absolutely essential, regardless of whether they ever use it. Research Monitor effectively calls their bluff. (Conversely, the reports are equally useful at demonstrating if a resource is being well-used and justifying its cost).

The reports enable one to look at usage figures year-by-year, or even by month or by day within a specified period. You can look at a single database or compare several at once. For libraries facing budget cuts in the coming months, these comparative reports might be one way of deciding and justifying unpalatable cuts in resources. A very useful feature for major databases such as Westlaw, Lexis and PLC is the ability to look at the usage of individual portions of the database (E.g. comparing usage of the legislation modules on Westlaw and Lexis or comparing usage of the different PLC services).

Within the spreadsheet reports one can also look at who is using a database – either by department or individual. The former is extremely handy if you have to allocate the cost of general databases, such as Lexis or Westlaw, across departmental budgets. Having access to details of who really uses a database is an excellent method of cutting through inter-departmental budget wrangles.

I find it extremely useful being able to look at usage of databases and journals whenever a question arises, without having to wait for the data to be supplied from the publisher. Even when publishers can provide the information quickly, there is rarely the ability to look at the information in different ways – and certainly not the option to compare it against related services.

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A couple of minor caveats do need to be borne in mind.

The system combines the research history from the databases with information on the organisation's personnel drawn from its HR database. The latter is of course a dynamic database which changes to reflect people moving between departments. This means that if someone transfers from one department to another, their research history transfers with them. Take the case of a trainee who spends six months in the Tax department carrying out large numbers of Lexis searches and then moves to Corporate. If you run a search on Lexis usage by department prior to the move, that trainee's searches would be included. If, however, you ran the search after the move, they would appear as searches run by the Corporate department.

This can skew the figures quite badly if you are looking at usage by department. If these figures are important to you, then you need to ensure you set up a routine of saving reports, especially just before trainee seat changes. Priory Solutions are currently working on a solution to this problem, which they hope to roll out mid-year.

It is also worth noting that a number of databases, and particularly online journals, are highly valued by lawyers for their current awareness alerts. This will not be reflected in the Research Monitor usage reports, unless the reader has then clicked through a link to the database. This should not affect the report too badly, but it is worth bearing in mind that you are probably not seeing the total value of a subscription on a report.

2) Using the password control tool

The Research Monitor password management tool enables individual passwords to be added to the system and associated with an individual's IT account. When the lawyer logs on to his p.c. he can then access the password-restricted material directly, as he will automatically be logged on by Research Monitor. Lawyers avoid both the risk of forgetting their passwords and the temptation of passing on details to unauthorised users. The system is thus convenient and very useful in terms of risk management. Also useful from this point of view is the fact that usage reports can be set up to show whether someone has accessed the password-controlled part of the database or just the website's homepage. This provides a means of double-checking usage and also gauging whether there is a realistic demand for additional subscriptions.

The procedure for adding usernames and passwords to the system is reasonably straightforward and it is very quick to change user details on the system.

3) Looking in detail at users' research patterns as a way of improving training courses

Now that most lawyers have a reasonable familiarity with most key databases, especially trainees joining the firm, it is clearly redundant to produce basic introductory courses for databases. For some years we have focused instead on improving the efficiency of lawyers' search techniques. Research Monitor will be a useful tool for this.

As has already been explained, you can run flexible reports on any database or online journal to see who is accessing it, how often and the number of documents accessed. This in itself will often flag up training needs or the need to publicise the availability of a particular service.

It is also worth noting that you are not restricted to monitoring subscription services. Priory Solutions can set up monitoring of research websites, to gain a fuller picture of research patterns. This would clearly have to be used sparingly in view of the amount of data it would capture, but does offer the possibility of conducting studies on discrete topics such as European legal research, where one could compare usage of Europa with subscription sources.

In addition, for LexisNexis Butterworths and Westlaw it is also possible to run detailed reports to see the search strategies used. These reports are presented in Excel and, as can be imagined, return an enormous amount of data. The spreadsheets provide separate worksheets for the different elements of the databases (Legislation, case law, journals, etc.) and this helps to make the data more manageable. The data captured includes details of the user (name, employee status (partner, associate, trainee, etc.) and full details of the search. There are two options. One report summarises the research in one cell. The most detailed report, however, shows exactly what was entered in each search field on the database.

In practice, I have found that to be able to draw any meaningful conclusions from the data, it is necessary to focus quite narrowly on a department, resource or employee type. Otherwise one is overwhelmed by the amount of data. Priory Solutions are very helpful in setting up restricted reports to try to cope with this volume – e.g. limiting a report by date, or looking for usage by a particular department or employee type.

It is early days for us in terms of using this data in conjunction with our training courses, but already it is flagging up issues which we can tackle - search strategies for statutory definitions of words and phrases being a good example. Not only does Research Monitor flag up common issues – but it also provides examples which one can cite in training courses. I am hoping that real-life examples of inefficient searching will help concentrate minds during training courses and demonstrate the

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practical advantages of really getting to grips with the search capabilities of the major databases.

General issues: pricing

Research Monitor is priced as an annual subscription, rather than as a one-off cost. This has the advantage of spreading costs and of course means that the suppliers have an interest in improving the product to retain business. Unlike some similar services, Priory Solutions also offer free trial access to the service.

Once a subscription is set up, there is of course the possibility that this might be cost neutral – especially if it reveals costs savings in online subscriptions. In addition, the chargeback facility can also help the product pay for itself.

General issues: IT support

IT support for this product is excellent. Priory Solutions works closely with clients in setting up the system to meet specific requirements and then adapting the service if requirements change. A huge advantage is that the IT support is provided by the people who designed the service in the first place. This means that they know the system inside out and are able to fix problems speedily. They are also happy to recognise areas which could be developed and readily come up with creative solutions. The fact that the developers had a background in law firm IT is also an enormous boon - meaning that they have the necessary familiarity with legal databases, as well as their own system.

In short, this is a highly impressive service. It gives a tremendous insight into how your database subscriptions are being used, and the system's flexibility in allowing you to produce summary usage reports, detailed records of search strategies or to collect data to be used for chargeback gives it a large array of potential uses.

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Book Review

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WEBB, Jela *Strategic Information Management: a Practitioner's Guide*. Chandos Information Professional Series; Oxford: Chandos Publishing (Oxford) Ltd, 2008. ISBN: 1843343762 (pbk): £45.00, 248 pp.

My initial interest in Jela Webb's book stemmed from a desire to learn more about implementing information management (IM) initiatives - how to conduct an information audit, formulate information strategies and ensure that information becomes a real business asset. I was not disappointed.

Firstly, I'd like to begin at the end: after finishing the book and absorbing its contents, my ever expanding knowledge information history was much richer. For example, within the book, Webb discusses the first person to use the term 'Information Literacy', and investigates the origin of classifying the 'ultimate intangible' as a valuable asset in its own right, revealing the first articulation of the concept to be in a report produced by the 1995 Hawley Committee, whose findings and recommendations are responsible for shaping our current information landscape. Elsewhere, the reader is given a brief yet compelling history of IM, covering no less than 4000 years, culminating in Tony Blair's assertion that "oil is no longer the most important commodity on the world: it is information."

This interesting history lesson serves as a prelude to a discussion of IM initiatives immediately prior to its emergence as a defined discipline. Instead of following the current vogue and interpreting these initiatives as mere fads, Webb clearly outlines how quality circles (problem solving via information sharing groups), total quality management (top down initiative backing), business process re-enginering (avoiding re-inventing the wheel) and other such programmes have in fact coalesced to become what we now know as Knowledge Management (KM).

Not that history is in any way to be considered the main thrust of this title. The deft touch Webb displays when relating the origins of IM is also evident throughout the work. The obligatory explanations of data, information and KM clearly relay the necessary concepts

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