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Product Review – Solcara Solsearch

In common with all law firms we want to ensure the effective use of resources. Effective and efficient use of legal information resources has become a particular issue with the development and availability of material on the internet. The basis and methodology of legal research has changed. To a significant extent, it has moved from a controlled activity carried out through the public core of a library to one of private uncontrolled access to resources of variable quality. Internet resources can provide vast amounts of relevant focused material while at the same time leading enquiries up wrong paths and wasting valuable time with multiple "false positive" results.

But what if a system could provide a one point search against multiple resources returning the equivalent search as the target database? What if this system could direct users to the recognised internal and external resources for case law, legislation, know how, legal news and template/precedent documents? What if, in addition, the system provided an audit function to track the searches which have been conducted and identify any issues which users have encountered in their search routines?

In 2007, Matheson Ormsby Prentice (MOP), one of Ireland's largest law firms, installed Solcara Solsearch as a means of tackling some of the issues associated with internet database usage. The aim was to provide template access to key internet and internal resources. This would reduce the number of individual searches required to locate relevant material and would also direct users to conduct searches against specific resources. The concept of a federated search engine is not complicated. It provides a mechanism to run the same search against a multiple of databases and websites, using the same search routine as would apply in the target and returning the same results for this search. The main benefits are apparent, less searches for the same result and confirmation that users are directed towards relevant resources.

Installation and connectors

We installed, customised and trialled Solsearch over a period of eight months and launched the application for all users in January 2008. On commissioning we named the system MOP Search and it runs off our intranet launched through an editable home page. This MOP Search home page provides basic instructions and links to additional information on the system.

Solsearch runs through a series of connectors which define the target databases, the search routine mechanisms specific to each database and other protocols required for access. The connectors accommodate IP recognition access. If a login is required to access material, Solsearch will complete and display search results, but the user has to login to access the target material.

One of the biggest tasks in planning the system is to identify the target databases that are to be included and to then group them in some logical and user friendly fashion. Like many users we opted to group collections of databases under cases and legislation. Thus, a search against the grouping under Irish Case Law runs the same search against material from a range of free to use databases (e.g. BAILII) and subscription databases (e.g. Lexis Library). Successful grouping requires clear identification of the databases to be included, what parts of those databases should be searched and the way in which search routines run in different databases. For example, decisions have to be made during the design of connectors as to what particular part of a database is to be searched. In the instance of BAILII, this is akin to "ticking the box" for the particular set of cases against which you want to search. This then allows for the design of a relatively intuitive and single search routine for a user against a multiple of sources.

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In some instances, the construction of connectors also requires negotiation with commercial database providers so that they allow access for Solsearch as a third party under the primary licensing arrangements.

One of Solcara's strengths is its understanding of the legal market and its strong relationship with various legal database providers. This was particularly useful in the planning and set up stages when practical and timely solutions were needed to keep the project on a tight timeline.

Internal materials

One of our requirements was to include material from our intranet. This included an archive of legal news items spanning a ten year period and material held in our document management system. This required a greater amount of structural work, including the setting up of an automatic indexing routine to ensure that any updates to this material would be captured in ongoing searches.

How Solsearch Works

Once the design and configuration of the connectors is complete, the layout of the Solsearch search screen can be undertaken. This is the key component of the user interface and the trick is to make it as clear and logical as possible. This requires a balance between the multiplicity of resources being searched and the need for a user friendly and intuitive interface. The solution is to collate relevant resources into groups such as cases, legislation, know-how, etc. This process will vary depending on the needs of individual customers, although my experience is that broadly the same sites are grouped under the main key headings.

Solsearch also provides for groupings to be customised according to a particular specialism or practice area so, for example, corporate law users would have a different list of search options to banking or property law users and this customisation process can be extended to individual users. At MOP, we have maintained a single generic search screen for all users. This has proven useful for familiarity of use amongst our key users, the trainees, who will move on rotation through different practice areas.

To generate a search, the user ticks boxes for the options available on the screen: case law, legislation etc and enters the search term in the search field. An option is available to vary the search between:

- "Find All" - for a single word ("rent") or for multiples ('rent review' will find 'rent' AND "review").
- "Find Any" - for a single word ("rent") or for multiples ('rent review' will find 'rent' OR "review").
- "Find Phrase" – for a phrase ("rent review" will find the phrase "rent review").

The two most common problems with search usage are:

- Users not realising that the default is set to "Find all" and using this to search for a phrase without resetting to the correct option.
- Users adding in the word "and" or the word "or" to their searches. Solsearch does not require the use of these connectors, whereas the target database may require their use. Use of these words and prepositions is an ongoing issue and has been marked by Solcara to be addressed in forthcoming releases.

The search results are returned in initial blocks of five hits from each of the databases searched. This can be expanded to the full number of results. The speed of return in Solsearch is one of its most impressive features and bear in mind the time which is also saved by not having to login to or access each individual database. There is currently a default limit of 50 returns per database. Users are sometimes not aware of these limiters and the screen layout and signage does not assist clarity in this area. I am aware that Solcara are addressing this issue in the next release.

Dependant on the underlying system design, each result will display title, author, abstract and other designated details from the target database. Each return will also enable the user to access the item directly on the target database via the connector.

In a nutshell, that is the basic search process on Solsearch. There are other features, including the facility to bookmark and share results. In my experience, the search process and accessing the results is the core usage element and benefit for users.

Connectors and customisation

There will most likely be a requirement for some customisation with Solsearch, probably in relation to connectors to external databases. Firstly, access has to be agreed with the database provider. In our case, Solcara were able to arrange most of these connectors. The issue of third party licensing for connectivity is one that has shadowed federated search engines over a number of years. It now appears that database providers are prepared to take a more realistic and customer oriented approach. For the moment at least, it would appear that connectivity licensing is not a high agenda item.

Connectivity also means that any changes in the makeup, structure or address of the target database will require changes to the Solsearch application. Solcara are usually quite good at monitoring these changes in external databases and can make the necessary changes to Solsearch connectivity online. Changes to internal databases such as system upgrades will also require changes to the relevant connectors. You should also be aware that downtime on one of the target databases will impact on Solsearch and may be interpreted by users as a fault in Solsearch rather than a problem with the target.

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Customisation also means branding of the home page and the writing of instructional text relevant to particular use and circumstances and, as already mentioned, it can progress to developing specific search templates and pages for particular practice areas and groups.

Monitoring and auditing

Solsearch comes with a number of administration tools which can assist with ensuring best practice and efficient use. Chief among these, in my opinion, is the facility to check on usage levels. This includes information on who is using the application, peaks and troughs of usage, databases searched and accessed and search terms used. The latter is particularly useful in identifying any recurrent problems with search use and in assisting individual users with search issues.

That said the existing administration facility is somewhat clunky and does not allow for the easy export of reports. I understand that this issue is to be addressed in a forthcoming upgrade. With Solsearch v3.5 it will be possible to export results to Excel for further manipulation and better presentation.

Key Benefits and Limitations

The target market for our introduction of Solsearch were our trainees – those who undertake the larger part of legal research. MOP Search is now a fundamental start up search tool for our trainees and is introduced at an early point in their legal research skills training. The key benefits of it as a basic research tool are:

- It directs users to specific identified resources in situations where they may be unfamiliar with these.
- It provides multiple results for one search.
- The return of multiple "same" results from different sources serves as a validation of the result.
- It will provide the same result for the same search if this were conducted directly in the target database.
- It searches against internal and external resources.

Solsearch provides a simple basic search facility against the resources to which it is directed. In order to provide a generic simple search approach, it cannot incorporate any of the more complex or specific search routines available in some of the target databases (e.g. complex boolean and nested searches on Lexis Library). While this is made clear in the home page instructions, there is a danger that users can overly depend on it to the exclusion of other more elaborate and direct search mechanisms.

Despite being simple to use, there is a constant need to remind users of some of its key features and limitations. Amongst these are:

- It provides a limited simple generic search against multiple databases. There may be a need to search directly in the target database using a more elaborate search routine.
- It searches the specific databases for which it is set up. There may be other databases against which a search should be conducted.
- Solsearch defaults to a particular search – 'Find All'. Frequently I find that users misinterpret this as equivalent to 'Find Phrase'. This can result in false returns and requires regular reminders to users. This is an issue which Solcara has promised to address in future releases.

Looking back and going forward with Solsearch

Overall, our experience with Solsearch over the past three years has been positive. The product has delivered what it promised and has become, as MOP Search, a much used basic tool in legal research. Support in terms of dealing with service issues has been very good although there has been a delay in dealing with a number of structural issues raised within the user group. Some of these are mentioned here and the delay may well be due to the need for consultation and aggregation of needs and requests before embarking on change.

One of the key positives has been Solcara's understanding of how law firms work and of their interaction with key providers in the legal resources markets, a quality which I hope they retain in the years ahead.

We are shortly planning to upgrade to the latest version of Solsearch (v3.5) and subsequently plan to carry out a number of additional developments to the service. These will include:

- Encouraging users to bookmark important search results for future reference on a personal level.
- Creating collections of search results relevant to particular practice areas and specialisms which can be accessed for further reference. We hope to provide links to these from relevant intranet pages using them as caches of specialist know how.
- Identifying where we can move to IP address recognition access to facilitate easier login arrangements through Solsearch to external databases.
- Looking at the restructuring of search options on the home page to provide greater clarity for users and to further streamline the search process.

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