

# IKE

## Information, Knowledge, Etc.

An Information Management System  
Using SharePoint



Northwest Justice Project

*Final  
Report  
LSC TIG  
#11076*



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# LEGAL SERVICES CORPORATION TIG FINAL REPORT

**Grantee Name:** Northwest Justice Project

**Date Submitted:** March 5, 2014 (revised)

**TIG Grant #:** 11076

**Approval Date:** April 22, 2014

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## I. Project Goals and Objectives

Throughout 2010, in light of our new mission statement, “As a dynamic statewide law firm, NJP pursues its mission through legal advice and representation, community partnerships, and education to empower clients and combat injustice in all its forms”, NJP management and staff engaged in a mission implementation/strategic planning exercise to examine such areas as technology, advocacy coordination, organizational structure and community involvement. As part of this process, the Technology Workgroup surveyed all staff regarding “gaps” in present NJP technology. The largest “gap” identified by far was the absence of an adequate way to organize all of the NJP’s resources - legal briefs, memos, forms and training materials and have them easily accessible through a good, natural language search engine.

The Northwest Justice Project (NJP) was awarded this 18 month grant in January of 2012. The primary goal of the grant was to “Improve the effectiveness and efficiency of client services by enabling NJP advocates to share knowledge resources throughout the organization via a secure, enterprise-level, statewide information management system utilizing Microsoft SharePoint technology.”

The specific goals and objectives were as follows:

- Developing and implementing an information management system using SharePoint to allow advocates in NJP’s 17 offices to share work product and resources and have a designated collaborative workspace to work on projects, strategies and strategic advocacy resulting in more efficient time management and client representation.
- Integrating the SharePoint system with NJP’s case management system (CMS) (Legal Server) to leverage advanced search technology that enhances advocates’ access to resources contained in NJP’s primary information storehouse as well as increasing efficiency by developing the functionality to upload documents from either location

These goals and objectives were successfully achieved.

## II. Evaluation Data and Methodologies

NJP has used and will continue to use several forms of qualitative and quantitative data to measure the usefulness of IKE including user testing, email inquiries to staff, surveys, and SharePoint statistics.

**User testing:** IKE was launched in September 2012. Prior to the launch, the Information Management Work Group, an all staff committee set up as part of the Strategic Planning process, worked with our University of Washington Information School interns and Mark Pace, the SharePoint consultant, to develop an initial taxonomy and test its usability. After a series of initial trainings in November and December, staff were encouraged to test and give feedback.

### Surveys:

- 2010 Strategic Planning Survey/Pre IKE: This survey to staff was developed by the Mission Implementation Technology workgroup to identify the gaps in NJP technology asking three questions: Please let us know why you are unhappy with the Advocate Resource Center (ARC) and what functions you would like to see in a new and improved knowledge management tool; What other gaps do you think exist in NJP's current technology?; and How would you fill those gaps or otherwise improve NJP's technology to make your job easier or more effective? (survey attached)
- Information Management Naming Survey: All staff were invited to submit names for the project in June 2012. 33 names were submitted, 96 voters. The name "IKE" was the winner- Information, Management, Etc. (survey attached)
- IKE User Survey: In May 2013 the expanded IKE Committee developed an IKE User Survey which was sent to all staff over Survey Monkey. (survey attached) The survey was developed to track the usability of the system and suggested improvements to the taxonomy in areas such as document type and issues as well as home page design, Q&A/Help topics and general navigation. Eighty one (81) staff responded. Substantial changes, discussed later, were made to the system as a result of this survey.
- IKE Legal Assistant User Survey: This survey was specifically for the legal assistants to assist our iSchool intern with the document types for tagging. (Survey attached)

**Statistics and Reports:** We have created graphs and views in SharePoint to show the following live:

- Graph: Number of documents posted per month
- Graph: Number of documents posted per substantive law area
- Graph: Top ten issues (under construction)
- Graph: Top Ten Document types posted
- Graph: Usage data: resources downloaded or viewed
- View/report: Number of staff contributing content (who and how many)
- View/report: Doc Types: number of each posted

### III. Summary of Major Accomplishments, Recommendations and Future Steps

In early September of 2012 NJP had a contest to name the new information management system and IKE, Information, Management Etc., was selected. IKE had a “soft launch” via an introductory video at NJP’s All Staff Meeting later that month and began its iterative development shortly after. NJP has made great strides in closing its information gap and successfully providing a centralized location for resources as seen by the following accomplishments:

- A locally installed or “on premise” SharePoint platform was chosen as it was best suited to NJP’s knowledge management needs with respect to functionality, maintenance, price, and security. This implementation allowed for the following:
  - The local installation made integration with Legal Server, our case management system, possible. Due to this successful integration, staff can now upload documents from either IKE or Legal Server and have them appear in both places. During this process, data from the client’s record such as case number, county of residence, legal problem code, special legal problem code and court routinely captured in Legal Server is automatically tagged to the document for future searching or filtering. (pg. 29)
  - A flexible taxonomy and tagging system for each substantive area of law was developed allowing staff to easily tag and post their documents as well as find what they need through a keyword search or browsing.(pg.11)
- Eight customized “Dashboards” have been created for specialized groups to share resources and work collaboratively. Currently, advocate staff actively manage the following dashboards: CLEAR Hotline, Public Benefits, Child Care Overpayments, Western State Hospital-Tacoma, IKE Working Committee and three statewide Strategic Advocacy Focus (SAF) workgroups including Driver’s License Suspension, Community Economic Development and Administrative Disqualification for Employment. Organizing the information generated by NJP’s statewide advocacy effort would have been very difficult without a centralized depository such as IKE.(pg. 24)
- Multiple resources were created to make the system user friendly including a simple upload form (pg 30) to easily post resources to the system while working in either SharePoint, Word or Legal Server; a “How to Use IKE” video was created and added to NJP’s New Employee Video Suite and a new more efficient IKE home page and Q&A/Help areas were re-designed as a result of staff input. (pg.33)
- To date, there are over 1300 documents shared on IKE in a variety of substantive law areas reflecting NJP’s advocacy efforts.
- A Best Practices document has been created and shared with other programs as well as being publicized on the LsNTAP website. Programs across the country who are looking at developing a similar system have already contacted NJP. During 2012-2013, Sue Encherman, the Director of Administration demonstrated IKE online for legal services staff in Alabama, New York, Vermont, Philadelphia, Utah, Chicago, Atlanta and San Diego as well as presenting at numerous national conferences. (pg.26)

## IV. In-Depth Analysis of Accomplishments

This was an 18 month project coinciding with NJP's strategic planning exercise. IKE development is ongoing but the base system was completed within the required time period. The Legal Server integration was tested extensively on the demo sites and moved to the live sites in December 2013 for use by staff.

### A. Developing IKE

NJP developed our information management system, IKE, by successfully accomplishing the tasks below:

- Selected and implemented a local SharePoint platform.
- Collaborated with Microsoft consultants and University of Washington Information School (iSchool) team regarding the choice of platforms after educating them with regards to NJP's current way of working and hopes for the new system.
- Hired a SharePoint consultant to work with staff on IKE development, customization and training.
- Secured an extern from the University of Washington iSchool to help develop the initial IKE taxonomy.
- Expanded the Strategic Planning Technology committee to become the IKE Information Management committee made up of advocates, tech staff and legal assistants to provide input on design, taxonomy and overall structure.
- Created a flexible taxonomy structure with tags for each substantive law area best suited to advocate needs.
- Worked with consultants and staff on underlying tables and design of SharePoint pages and dashboards to display information in a way agreed upon by staff.
- Designed a user friendly "upload" form in both IKE and Legal Server to tag documents quickly.
- Created a "Best Practices" document and posted on IKE and the LSNTAP website to be shared with other programs.
- Developed an on-line help manual on IKE which will also be posted on the LsNTAP website for public sharing.
- Tested and revised the taxonomy as well as the home page design based on staff input.
- Successfully integrated SharePoint with Legal Server, our case management system, to leverage advanced search technology that enhances advocates' access to resources contained in NJP's primary information storehouse. This was achieved by:
  - Working with PSTI to create and implement an API to seamlessly exchange case documents and information between the Legal Server case management system and SharePoint and to transfer associated meta data with documents
  - Constructing parallel metadata filters for SharePoint to query most commonly used fields/data in Legal Server.

NJP did a “soft launch” of IKE on September 21, 2012 at NJP’s All Staff Meeting with an initial taxonomy and tagging structure. The first round of trainings occurred in late November and early December 2012 followed by a more advanced set, in August 2013 and March 2014.

## **1. The Historical Process Leading up to the IKE Grant**

Throughout 2010, NJP management and staff engaged in a strategic planning exercise to examine many program areas including technology. As part of this process, the Technology Workgroup surveyed all staff regarding “gaps” in present NJP technology and received excellent feedback. The largest “gap” identified by far was the absence of an adequate way to organize all of the NJP’s resources - legal briefs, memos, forms, and training materials and have them easily accessible through a good, robust, natural language search engine. Along the same lines, the Advocacy Coordination Work Group recommended NJP; (1) Develop tools to efficiently share information among advocates, such as standardized forms, case planning templates, and expertise directory; (2) Create new on-line user-friendly advocate resource library; develop policy and protocol (e.g. User Manual) for maintaining, posting, and retrieving resources; and dedicate qualified staff to support system and users.”

NJP took this “gap” in our technology seriously and leveraged free expertise to get the project rolling in anticipation of the 2012 TIG application. Lacking the expertise in-house to act, NJP contacted the University of Washington Information School (iSchool) and was accepted as a Capstone Project for the spring 2011 quarter. (The UW iSchool is one of the most prestigious in the country.) NJP was assigned a team of three graduate students to start the process, do some initial research and investigation and make a recommendation as to a possible platform and initial taxonomy to be employed during a short 10 week window of time. (March -June 2011.) The platforms examined included on premises and cloud based SharePoint, Google Sites, Google Docs, NetDocuments and use of a Google Search Appliance. In recommending a platform, the students made sure it would be able to use an application programming interface (API) that was compatible with Legal Server, NJP’s case management system, a platform where staff already “live” and are comfortable. The iSchool team met with IV Ashton of PSTI to insure that the data structure matched what already existed in Legal Server thus laying the foundation for a future integration if this TIG proposal was approved.

The students at the iSchool researched the possible platforms and created mock ups on Google and SharePoint which were presented to the staff committee. SharePoint, due to its flexibility and advanced customization was the choice of the committee. The students’ final project, a sample SharePoint implementation in the area of housing, was presented at the iSchool on June 2, 2011. NJP then secured an iSchool summer intern to carry on the team’s work by continuing to work with staff on potential tagging structures and design and help keep the project moving until the start of the TIG cycle in January when the SharePoint consultant would take over the primary responsibility. An excellent Executive Summary of the iSchool team’s project is attached.

In addition to the iSchool team, NJP met with Microsoft’s Director of Information Management and Compliance, Legal & Corporate Affairs regarding partnering with them on this SharePoint implementation. Microsoft itself had recently instituted an internal web based SharePoint



information management system enabling them to share resources among all of their corporate legal departments worldwide. Whether a large corporation or a legal services program, NJP's goals for a useable information management system were the same as Microsoft's as expressed below in their business case:

***Microsoft's Vision:***

*Utilize SharePoint 2010 to deliver a compliance driven document, records and contract management solutions that contains flexible taxonomies which corresponds to practice-level work*

***What is Information Management?***

*Information Management is how we create, collaborate, reuse, secure and retain our information assets in a consistent, efficient and predictable way.*

A team of NJP staff (NJP's Director of Administration, IT staff, Advocacy Coordinator and the NTAP Coordinator) along with the iSchool students were invited to Microsoft's campus on May 17, 2011 to discuss the project and how they might help us succeed in our vision through a partnership. It was clear at the conclusion of the meeting that this partnership would be advantageous to both parties in that NJP would benefit from interacting directly with the group that implemented their internal information management system. Microsoft staff were extremely helpful in helping NJP decide between using their newly released cloud based Office 365 version of SharePoint or the traditional "on premise" installation. After educating them about the Legal Server integration and API requirements, it was decided that the on premise platform would be less expensive per seat (using Microsoft charity pricing) and more flexible offering unlimited customization opportunities. They agreed to set NJP up with a SharePoint workspace or "sandbox" in their cloud so the team could become acquainted with the software prior to the TIG grant and the server installations. We met with them several times over the past 18 months to show our progress, discuss best practices as well as lessons learned. We are presently talking to them about making this project a "Microsoft Case Study" showing how they assisted a non-profit with a similar problem and how the system can be replicated to legal aid programs elsewhere.

NJP was awarded this 18 month grant January 1, 2012 in the replication category hoping to learn best practices from the Legal Services of Northern California (LSNC) program. Although LSNC is now using the Google search appliance and Google Sites on their own they initially set their system up with a SharePoint installation but realized it was not needed. They were very helpful in discussing the creation of their taxonomy system and stressed the importance of using a minimum number of required tagging categories as well as their overall experience with introducing an information management into their program.

NJP has used and will continue to use both LSNC's and Microsoft's lessons learned and implementation strategies to guide us through our process of improving IKE. (See Microsoft's "Lessons Learned" slide, as well as others, in the appendices.) Interest in replicating a system similar to what we hope to accomplish using SharePoint, with or without Legal Server integration, is of high interest to legal services programs around the country. In addition, sue Encherman did an IKE presentation and demonstrated the integration at the national Legal Server training in Chicago in September and numerous programs were extremely interested.



(National Legal Server Training PowerPoint attached) LSNC's Google/PIKA model along with NJP's SharePoint/Legal Server model will give programs around the country excellent choices in information management implementations and integrations.

LSC's awarding of this grant to NJP has allowed the program to:

- Address the "gap" in NJP technology identified by staff during the strategic planning process;
- Continue to develop, maintain, train and institutionalize the system at NJP by working with a SharePoint consultant and iSchool intern with taxonomy expertise;
- Fund the needed Legal Server modifications needed for integration with our case management system;
- Afford NJP the opportunity to work in a community partnership with both the University of Washington iSchool and Microsoft Corporation, two of the most respected Northwest institutions and lastly,
- Fund the required hardware, software and consultation necessary to build a sustainable system allowing NJP advocates to share resources and their work product statewide in an easy and organized manner.

LSNC's final report states: "The overall project goal and all stated objectives were completed successfully. With completion of this project, LSNC now has in place a well-organized, practical, cost effective, user friendly knowledge-content system that LSNC staff overwhelmingly report as helping them get their work done on behalf of clients more effectively, efficiently and with improvement in overall quality." IKE is already a great asset to the program. IKE is still new to NJP but as we continue to improve IKE and add content, NJP plans to have the same outcome with regards to saving time, increasing internal collaboration and providing more efficient client services.

## **2. Hardware and Software**

On July 2, 2012 SharePoint was moved from our test virtual server to the NJP SharePoint server network after having decided on a local "on-prem" installation offering greater flexibility with regard to the Legal Server integration as well as increased functionality not included in the cloud version. SharePoint now resides in NJP's virtual hosted network with redundant host and redundant storage nodes. An excellent comparison of on- prem vs. cloud installations prepared by our University of Washington Information School (iSchool) intern is attached. All required SharePoint and Windows Server licenses were purchased through Tech Soup. In addition, the StarWind storage array software was also purchased with a non-profit discount.

## **3. Consulting Services**

NJP contracted with Mark Pace, a local SharePoint consultant who owns his own company (Nuvem, Inc.) beginning March 1, 2012. This position was advertised locally as well as through the UW Information School and numerous applicants were interviewed. It was originally advertised as a part-time staff position but was later changed (with LSC approval) to a contract as all of the qualified applicants were consultants. Mark was chosen by the interviewing team

due to his excellent credentials and references, enthusiasm for the project and NJP’s mission and his past experience in working with Microsoft’s Legal and Corporate Affairs Department. This was a perfect fit with our partnership. In addition, he was willing to work on a much reduced hourly rate in order to participate. (Contract attached)

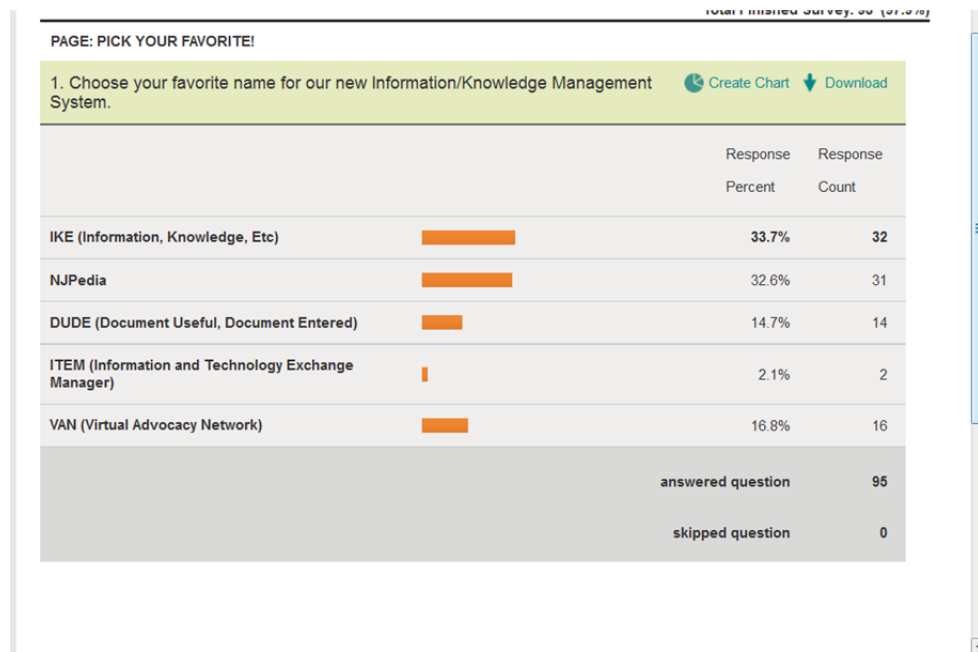
This position was originally written as a part-time librarian but changed to a SharePoint consultant once we realized that we needed advanced SharePoint expertise to achieve our goals as well as someone who could write code and work with PSTI on the API for the integration. all Mark’s resume, Memorandum of Agreement Re: Preservation of Client Confidences and NJP VPN User Agreement are attached. Mark has been working with NJP on an average of two days a week since March 2012 to design and implement the SharePoint system.

In addition, NJP hired Jackie Holmes, a University of Washington Information School graduate student for the 2012 summer internship (10 weeks) to work on the Information Management project. (The internship notices, Jackie Holmes resume and UW iSchool Learning Objectives Agreement attached). Jackie continued her work at NJP with an externship during the fall semester of 2012.

NJP entered into a contract with PSTI, for programming only, to develop the API for the Legal Server integration. (Contract attached).

#### 4. The Name Game!

Prior to the launch and in order to get the entire staff excited about the new system and their upcoming participation, NJP sponsored a naming contest. After an excellent turnout of voters, the selected winner was IKE (Information, Knowledge, Etc.) which was announced June 25, 2012. The finalists, out of the 32 names submitted, are shown below.



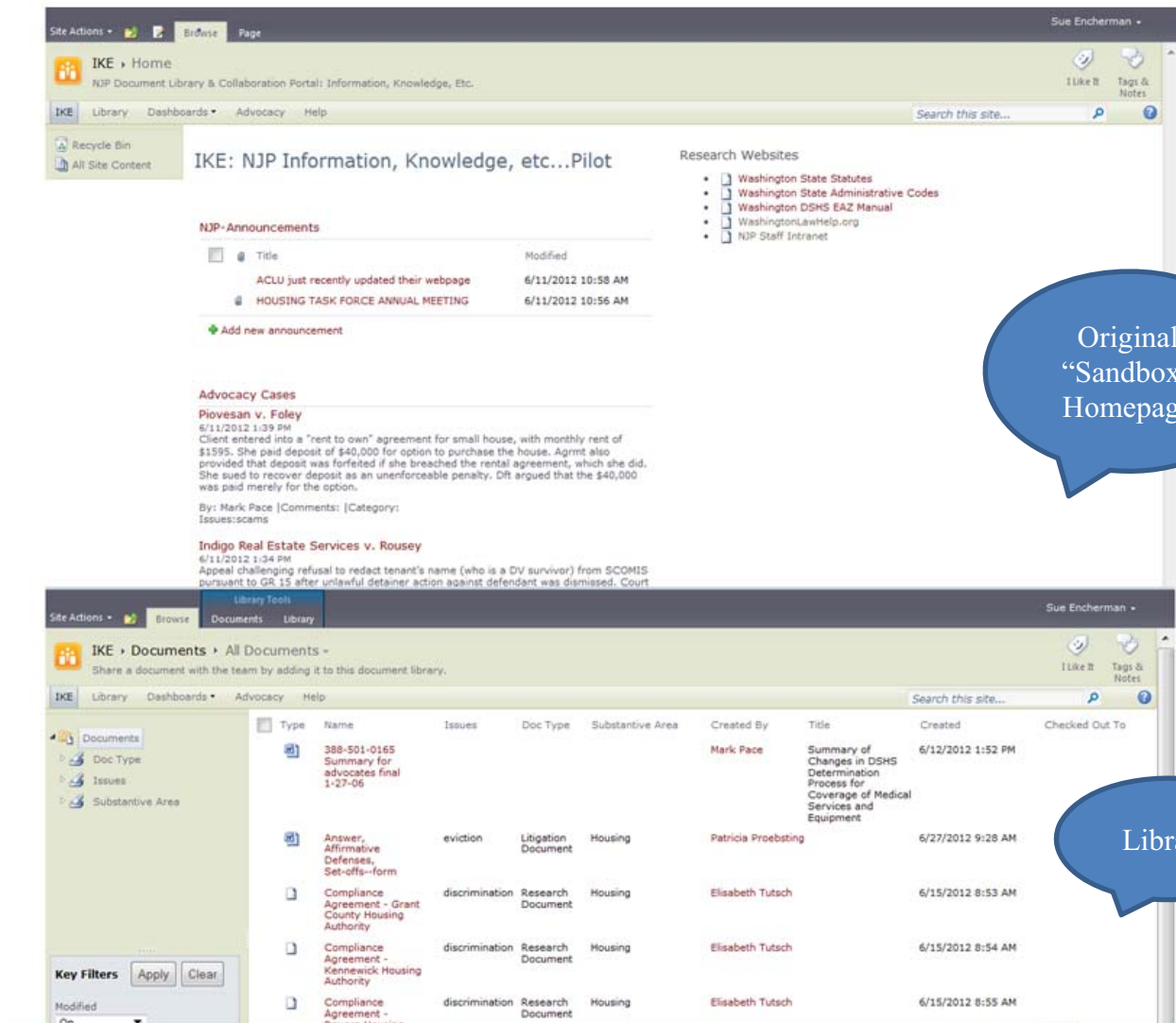
Once we had a name, the home page of IKE was redesigned and branded with NJP's website colors to make it our own and more familiar to staff. (See Home Page Redesign screenshots below)

## **5. The "Sandbox"- A Playground for Development**

Starting in March of 2012, Mark Pace spent time interviewing and observing all of the CLEAR (hotline) attorneys to see how they worked, on line and off, and what resources they needed at their fingertips. A SharePoint test pilot site (sandbox) was created in the cloud using space donated by Microsoft for our use prior to the on premise installation in July. It was populated with information derived from CLEAR input as well as the Housing taxonomy that our previous iSchool intern had worked on just prior to the start of the grant. Once a virtual local test site was created (<http://sptest>), Mark exported the information from the sandbox to the virtual site and then eventually moved it to the now permanent site. Staff can easily access IKE by typing <http://IKE> in their browser. Microsoft's generous donation of sandbox space allowed us to experiment with SharePoint long before our own installation was complete.

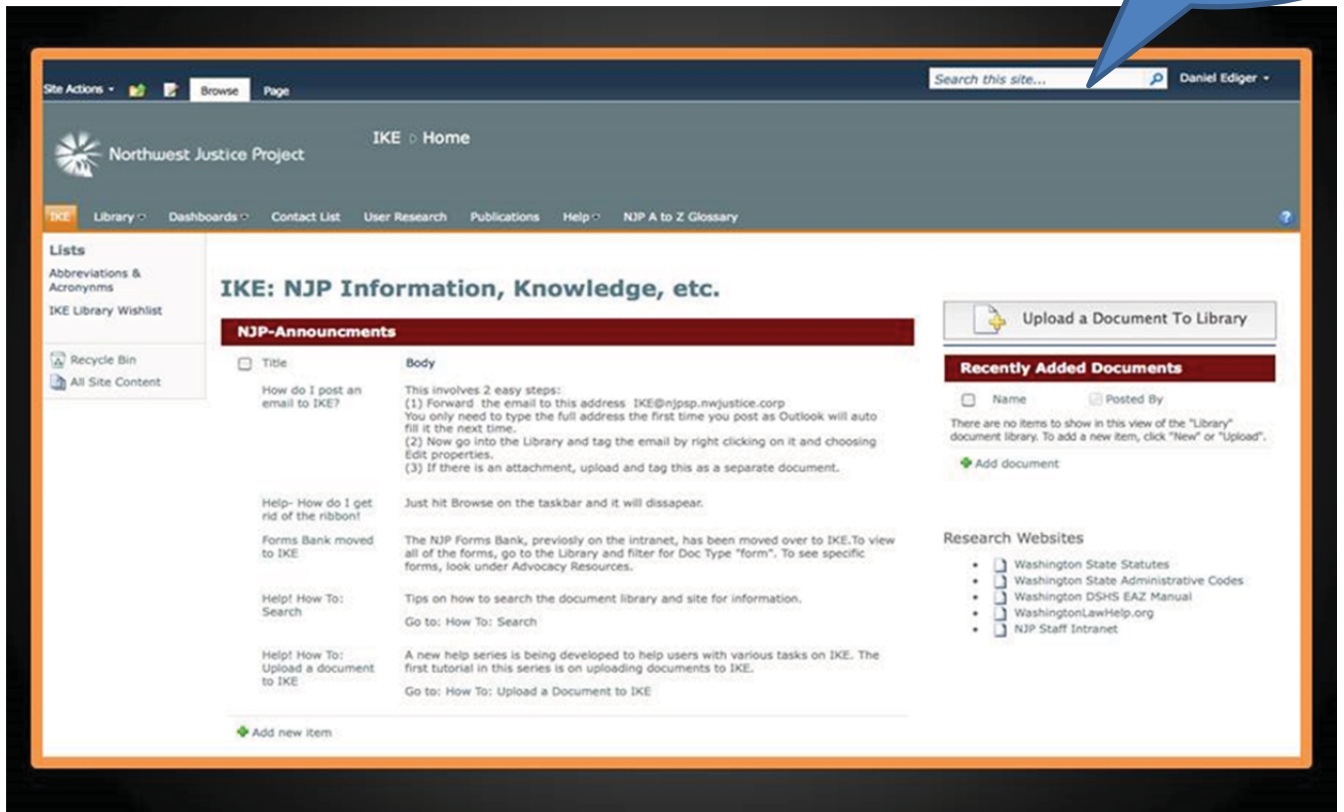
The first demo of the pilot site was done over GoToMeetings to the staff Information Management Committee in a lengthy meeting on June 12, 2012. After many excellent discussions, Mark made changes on the fly to some taskbar wording, formatting, layout and list order. This exposure to the power of SharePoint and its flexibility was very important for staff to understand. The Information Management committee, now called the IKE committee, is presently made up of the NJP Tech Team, Sue Encherman (project lead), 6 field attorneys, 4 CLEAR attorneys, Brian Rowe (NTAP Coordinator), the iSchool intern and 2 legal assistants, a slightly expanded version from the original committee.

The initial "sandbox" version of IKE looked like this with an Advocacy tab, Library and Dashboard. The initial "NJP Default" Library view showed all of the documents in a sortable list under column headings: Name, Issues, Doc Type, Sub area, Created by and Title.



As a result of this and subsequent meetings, the Advocacy tab was eliminated, a Publications tab added and the Home Page redesigned for the September launch. The Library view was also eventually improved.

IKE then looked like this: (Home Page redesign for the launch)



## 6. Migrating the Forms Bank

The first area to be deployed in July was the NJP Forms bank which was created in response to the strategic plan for the sharing of resources. It was temporarily located on NJP’s intranet to be accessible to all staff with the plan to migrate to IKE once SharePoint was ready. We also felt it important to have some content in IKE once we launched so demonstrations of IKE’s fast “search” would actually come up with results. Approximately 150 forms were tagged and uploaded to IKE. (Now at 207)

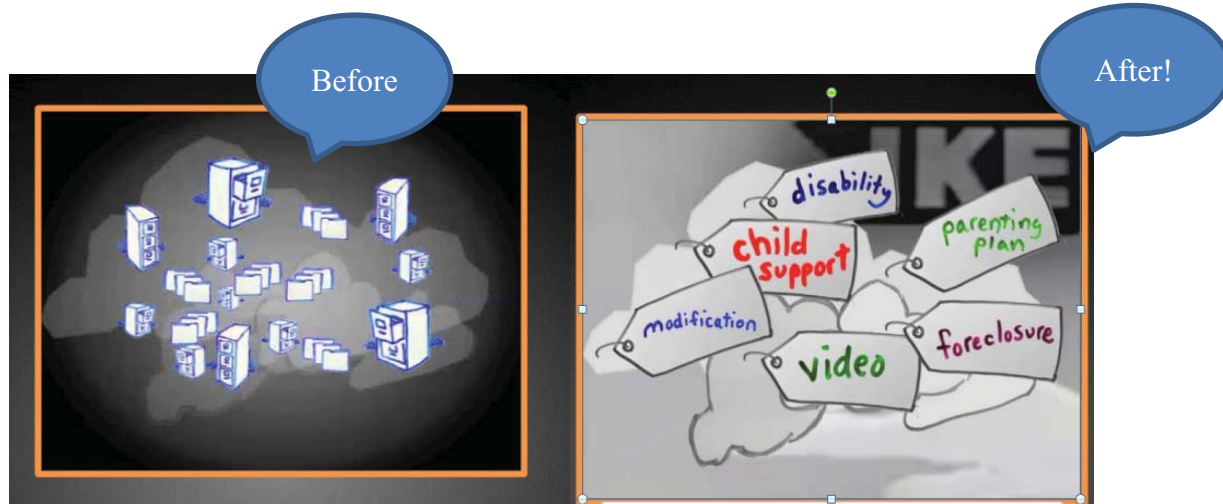
Client/Community Ed Mater	3902FR_ORDER GRANTING MOTION FOR RECONSIDERATION	court form	Form		Other Family	Family
<b>Form</b>	Motion for Partial Summary Judgment	Creates a legal pleading	Form		Housing; Eviction; Mobile Homes; Tenant Property; Unlawful Detainer	Housing
LawHelp:Client Education	Motion for TRO (names deleted) LL Lien	Creates a legal pleading	Form	Show Cause	Housing; Mobile Homes; Sale; Tenant Property	Housing
Legal Authority: Case Decis	<input checked="" type="checkbox"/> Motion for TRO and Order to Show Cause	Creates a legal pleading	Form	Show Cause	Housing	Housing
Legal Authority: Code, Stat						

## 7. The Journey from Folders to Tags - Developing the Taxonomy

Thinking in terms of a “tagging” system as opposed to the traditional way of organizing information using “folders and sub-folders” was a major change for staff and was a primary



hurdle when introducing SharePoint. In our launch video, we used a visual to introduce the concept which worked well.



## SharePoint's keywords & tagging make finding resources easy

As a result of the prior iSchool Capstone project and following LSNC's advice, NJP adopted a "wide and shallow" approach to its taxonomy and decided to offer only 4 tagging categories with drop down menus plus an area to type in "Additional Terms" not present in the drop downs.

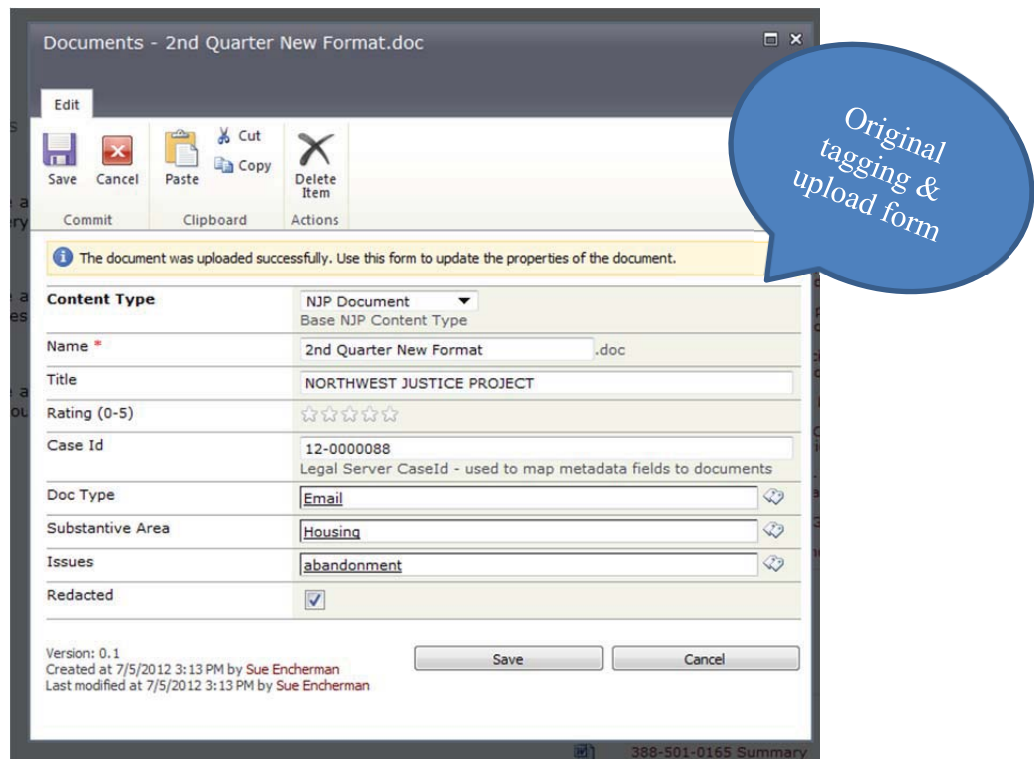
- Substantive area of law
- Document type (doc type)
- Issues
- Advocacy Resources (not case related)
- Additional Terms

In addition, no issue or doc type would expand more than 2 levels- one being preferable. (i.e., eviction/repairs vs. eviction/repairs/rats). We found that issues were missed if the tagging required the user to keep expanding the category.

Example of how a document might be tagged:

- Substantive area of law - *Housing*
- Document type - *Brief*
- Issues- *Eviction, mobile homes, unlawful detainer*
- Advocacy Resources (not case related) *Tips for Cross Examination article*
- Additional Terms – *reasonable accommodation*

The iSchool intern, Jackie Holmes, was pivotal in helping to develop IKE’s initial taxonomy. She worked over the summer and throughout the 2012 fall semester with experts in all of the substantive law groups to develop the tagging taxonomy for each area as well as collecting doc type tags. With some groups she used card sorting software and surveys to aid in this process. In addition, she tagged and uploaded all of the documents contained in the NJP Forms Bank which was located on our intranet and contained approximately 150 documents. (The Forms Bank Table of Contents is attached). The forms were tagged with a doc type of “form” and the levels in the Table of Contents became the form’s “issue” tag. The original tagging form on the test site looked like this:



The committee’s initial thought, with respect to the taxonomy, was to have each substantive law area have a similar issue structure. However, in speaking with Microsoft we learned that it was their experience that participation was much better if each “practice group” set up their issue structure in a way that best suited their practice as each group worked differently. This was very helpful information and gave each group some ownership over their list of tags. Microsoft encouraged us to have staff use IKE as soon as possible while still in early development on the test site so changes could be made on an ongoing basis and staff would see positive progress as a result of their feedback.

The taxonomy for Housing issues was the first to be completed followed by Public Benefits, Consumer, Family and other issues. The groups took slightly different approaches with Housing have a more general, shorter list while the Public Benefits group initially opted for a very “deep” and complex design forcing the user to expand multiple levels despite the advice given to them regarding other information management systems. This tagging structure however, was later re-evaluated and re-designed.



The taxonomy for the Document Type tags was a result of numerous discussions with NJP attorneys. A lengthy list was created which was later reduced to a more general set of tags by the intern, SharePoint Consultant, Director of Administration, and NJP Advocacy Coordinators. (This was again reduced and reorganized months later.) Tag satisfaction was also later evaluated by legal assistants in an online survey that was circulated in November 2012. The feedback received from the survey helped make additional revisions to the Document Type tags (Survey attached)

## 8. The Launch

On September 21, 2012, NJP had an All NJP staff meeting with 170+ staff in attendance. IKE was launched by creation of a video entitled “I Like IKE”. It was both humorous and informative and got the staff very excited. The video is stored on NJP’s private Vimeo page.

Watch the “I Like IKE!” video at: <http://vimeo.com/njp/ike> Password: **njp**



In addition, to increase enthusiasm, IKE pens were distributed to all staff for use at the meeting. (Not funded by LSC)



All new staff are given the login information for the IKE launch video which has become a part of NJP's New Employee Orientation video collection posted on Vimeo and accessed from the NJP intranet. The just completed "How to Use IKE" video has been added also. (Both video scripts are attached). In addition, both videos are posted on IKE.

## **9. Training**

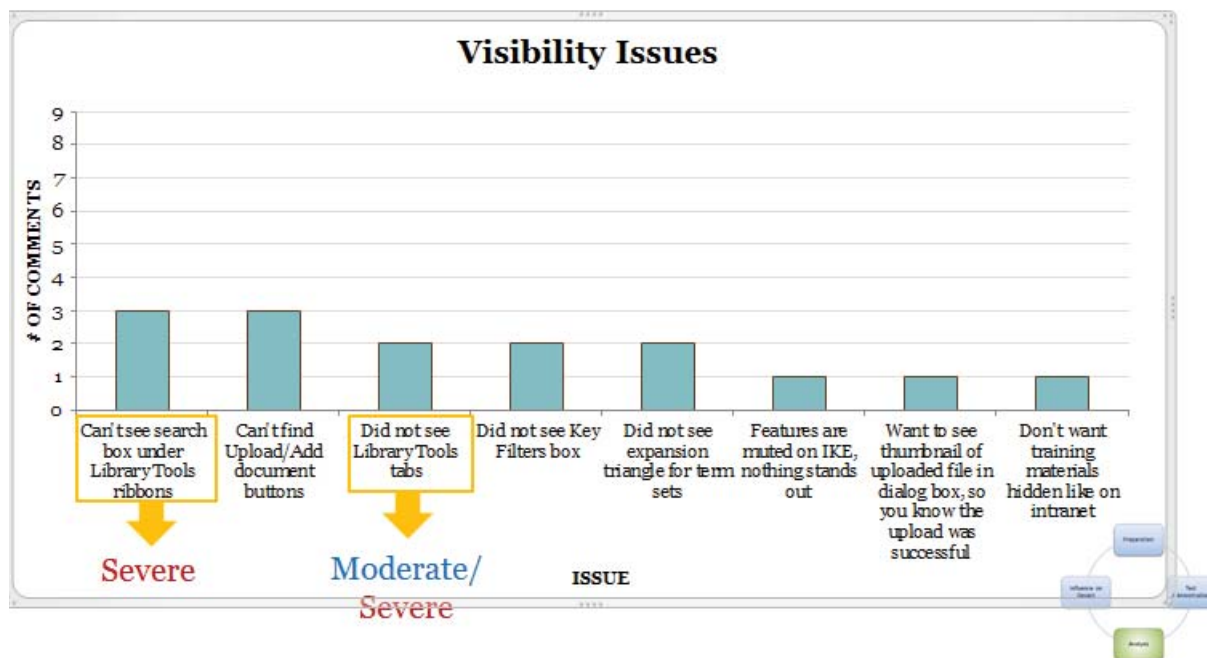
As the committee and advocate groups continued to work on the issue and doc type tags, NJP sponsored its first set of trainings in November and December 2012. These were 4 one hour webinars offered over GoToMeetings and Join.me to introduce the staff to IKE. Subjects covered included posting, searching, tagging, views, dashboards and general navigation. Approximately 30 staff attended each webinar. NJP offered Phase 2 training on July 25th, August 6th and 8th. This was offered as 3 one hour webinars over Join.me covering a review of tagging, posting and search plus training on Legal Server integration (demo), navigating the new homepage, posting a document "set" and use and creation of collaborative workspaces or dashboards. (Phase 1 and 2 training invitations attached) In addition to this online training, Sue Encherman offered onsite in-person training to staff during her summer visits to numerous NJP offices.

The backend or technical SharePoint training offered by vendors in Seattle tend to be lengthy (3-5 days) and very expensive per person. As an alternative, NJP had Mark Pace, our SharePoint consultant, train our entire tech department which was more efficient and economical as well as allowing us to focus on maintaining our specific application, future improvements and planning. Mark has been our SharePoint consultant from the start of this grant and was recently asked by Microsoft to work with the Microsoft certification test team to provide guidance and consulting on two Certification tests they are developing for SharePoint (70-488 Core & 70-489 Advanced). As a result, Mark provided our training using Microsoft's own course outline. The training took place on August 12<sup>th</sup> and 13<sup>th</sup> for 2 full days. Persons trained included James Logan, Network Admin, Jerald Roco, Network Admin, Sue Encherman, Director of Administration and IT Supervisor, Danielle Rebar, Webmaster (All of the WashingtonLawHelp publications are on IKE plus we plan to move the NJP intranet to SharePoint at some future date.) and Brian Rowe, NTAP Coordinator. The training was very hands on and consisted of labs and practical exercises. (Training materials attached). A one day follow-up training is planned for October.

## **10. Usability Testing – Survey, Learn, Re-evaluate, Re-design!**

Jackie, the iSchool extern, worked with the attorneys as well as legal assistants on testing for usability. In October of 2012, she presented an NTAP webinar on Usability (PowerPoint attached as well as posted on the LsNTAP website). An example of some of the usability issues pointed out by NJP staff during testing is shown in her PowerPoint slide below:

## Analyzing Results



Tag satisfaction was evaluated by legal assistants specifically from an online survey that was circulated in November 2012. The feedback received from that survey helped make additional revisions to the Document Type tags which were implemented. (Survey attached)

In person and virtual usability tests were also conducted in November 2012 to assess the ease and efficiency of uploading documents and searching/browsing for documents. Since these tasks encouraged users to use tags, some user feedback resulted in adding new issue tags.

The "IKE Access and Use Testing Plan" employed by our iSchool extern is outlined below:

**Test Dates:** November 19 – 27, 2012

**Facilitator:** Jackie Holmes

### Test Objectives:

- Determine *how quickly* users can upload a document
- Determine *how easily* users can upload a document
- Determine *how easily* users can *find* resources (documents and videos)
- Determine the ways in which resources are used

- Gather feedback to refine Library functions and/or design

### Participants

- NJP legal assistants
- NJP new employees (< 1 year)
- NJP law interns

### Methodology

- Participants will take part in the usability test at their personal office computers
- Test duration will be 30-40 minutes
- Participants will use IKE (<http://ike>) in its existing state to perform tasks; this may vary participant to participant because the IKE Library is dynamic, driven by user-generated content
- The facilitator (Jackie) will host the test using the script below and record notes by hand
- Information to collect:
  - Quantitative ratings of ease of use of uploading documents and finding resources
  - Reactions to Library design, tags, and resources available; Likes/dislikes
  - Suggestions for change

### Test Procedure

- Facilitator will introduce user to usability test
- Facilitator will ask participant pre-test questions
- Participant will go through tasks
- Facilitator will give participant post-test survey and thank participant

### Introduction

Hi, I'm [name] and will be facilitating this usability test today.

Thank you for agreeing to participate – your feedback is what helps us get to know what the IKE users expect, need, and want.

It's important you know this **isn't a test of you or your skills**, we are testing how well IKE performs. It might be better to call it a *user review*.

During this test, I'll ask you to perform a few tasks using IKE. You're encouraged to **think aloud** so it's easier for me to understand what you're thinking and doing.

This review will probably take 30-40 minutes.

Do you have any questions before we begin?

The results were analyzed by the intern, SharePoint Consultant, committee and NTAP Coordinator and necessary changes were made. For instance, after examining the taxonomy presented to the Public Benefits lawyers, they decided to increase the issues and doc types in

their area of expertise. These changes were added to IKE. Jackie created an extensive report on the usability testing which is attached along with supporting testing documents and templates. The Executive summary is below. Brian Rowe, the NTAP Coordinator who resides at NJP, has also been very helpful in the IKE taxonomy discussions as he is an Informatics graduate from the UW iSchool. As seen below, some “non-techy” systems were also used to organize the user comments!

Testing the I



Figure 1. Affinity diagram of usability test results

## Part II | Executive Summary

The NJP User Experience and Information Architecture (UX/IA) summer intern was the test administrator and conducted onsite usability tests at the NJP Seattle offices from July 30<sup>th</sup>, 2012 – August 16<sup>th</sup>, 2012. The purpose of the tests was to assess the usability of the IKE Library’s information architecture and interface design.

Eight NJP employees participated in the usability tests. Participants were lawyers and legal assistants. Each session lasted 20-40 minutes and was conducted in the employee’s office using their personal work computer. The test’s evaluation tasks were designed to test the document uploading and browsing/search functions.

The results of the tests showed features that both hindered and helped usability. Naming issues (such as technical jargon that was not understandable to all users) was the most cited problem among users. Issues concerning visibility, lack of instructions, and unexpected features were also common. The properties dialog box, which appears when a user uploads a document or edits a document’s properties, was a specific area that caused the most usability issues. Among appreciated features that made uploading and searching more efficient were the tag auto-suggest feature and the tag index.

The problems faced by users were summarized, discussed between the UX/IA intern, NTAP Coordinator and SharePoint consultant, and offered a solution. The list of problems and solutions were entered into a ‘Wishlist’ on IKE to provide transparency between the IKE development team and users. Each problem is currently being addressed.

On May 14<sup>th</sup>, all staff were sent a link to an IKE User Survey and encouraged to complete and give valuable feedback. The survey consisted of 21 questions: 81 staff responded. A summary is below.

1. I work at NJP as a... (57 attorneys, 2 paralegals, 19 legal assistants and 3 tech staff).
2. Have you ever been on IKE? (67 yes, 13 no)
3. Why have you not been on IKE? (46% answered "I have not made time")
4. How would you rate IKE so far? (we encourage you to add more info in the box below) 53% answered "Pretty good so far"
5. What do you need in order to make IKE a more useful resource for you? Examples of answers include:
  - a. Just the discipline to go to IKE instead of looking to other sources. It is in fact very user-friendly.
  - b. To make it a better tool for all: improve organization, clarify expectations and guidance about posting and tagging. To post my own documents: set aside reasonable time regularly to post documents.
  - c. More materials uploaded, etc.
6. Where have you accessed IKE from? (82% from the office)
7. Did you attend one of the IKE trainings presented last December and January? (71% yes)
8. Would you find a "How to Use IKE" refresher video to be helpful? (70% yes)
9. Have you used the instructions and helpful tips on IKE's home page?(44% answered No- I have not used them and 30% answered Yes- they were helpful)
10. Were you successful in finding what you needed on IKE? (40% yes, 33% sometimes, 27% no-please specify below)
11. When you are looking for material, what method do you use to search? (This was an open question, the majority answered keywords or using the search box)
12. Could the format of the search results be improved? If so, How? (75% answered format was fine)
13. Have you posted a document? Did you have a problem posting? (44% yes, no problem;38% no-have not posted yet;17% yes- I have posted and did have a problem)
14. Do you know how to post a group of related documents or document set? (90% no)
15. Do you understand how to tag a document?(55% yes, no problem;44% no-not sure)



16. When tagging a document, have you found the issue in the Issues list or did you need to type in the issue in the "additional terms" space?(56% yes- I found the issue for tagging;50% no- I typed it in)
17. Have you used the forms in IKE that were moved over from the NJP intranet Forms Bank? (i.e. Notice of Intent to Withdraw, Power of Attorney, etc) (68% nope- not yet)
18. Would you like to see more dashboards for specific substantive law areas?(68%-yes, this would be helpful)
19. Were you able to locate your SAF work group information on IKE?(35% yes, 11% no, 52% not in a workgroup)
20. What additional materials, documents, etc. would you like to see on IKE? This is a mandatory question- we are looking for your ideas! (54 answered- samples below)
  - a. Any motion someone at NJP has worked on in the past couple of years.
  - b. Community education materials. So many of us are making presentations on topics such as "barrier to employment" to service providers and client groups. I would be great to share these materials so that we are not all inventing the same wheels.
  - c. Briefs, advice letters, other pleadings of substance
21. Would you like additional training on IKE? (Check as many as you wish)(57% Legal Server integration;48% posting a document set;48% use IKE to collaborate with others; 44% searching;42% navigating, etc.)

The survey results were circulated to the committee and the suggestions, problem areas and comments led to the following immediate changes:

- Re-design of the Home Page and Help area with less text and more buttons
- Document Type tags have been consolidated leaving only Litigation Document type to be expanded to a second level
- A 2<sup>nd</sup> set of trainings were offered covering the needs expressed in the survey
- An e-newsletter was started to inform staff of changes, additions, etc. to IKE
- A quick link to IKE was placed on the staff intranet
- Sue Encherman, IKE project lead, now receives an automatic weekly email report from SharePoint showing any changes and additions to the library
- The WashingtonLawHelp publications are under a separate tab for easy access
- A leaderboard was placed on the Home Page showing most recently posted documents
- A count appears at the top of the Library showing the number of documents
- Users can now tag multiple doc types instead of limited to one

The New Home IKE Page:



Northwest Justice Project  
IKE Information, Knowledge, Etcetera

Search this site...

Announcements & Recent Documents

Pederson - answer an... Lisa Waldvogel 8.30.2013 NEW	Alliance Advocate Tr... Debi Perluss 8.25.2013 NEW
Materials from Adam ... Lisa Waldvogel 8.30.2013 NEW	Legal Work Supervisi... Debi Perluss 8.25.2013 NEW

**LIBRARY**

- Post a Document
- Legal Server View
- View Law Help
- View My Documents

**DASHBOARDS**

- CLEAR
- Public Benefits
- Childcare
- SAF CED

**HOW DO I**

- Upload a Document
- Find a Document
- Create a Document Set
- Post an Email

**(bottom of Home page)**

**DOCUMENT LEADERBOARD**  
Number of documents submitted to IKE

**Substantive Area**

Consumer	143	Health	18
Housing	142	IndividualRights	17
PublicBenefits	39	Education	5
Family	27	Juvenile	1
Employment	23	IndianTribal	0

**NJP VIDEOS**  
How To Videos

**NJP Featured Video**

Video Password: njp

**Password Required**  
If you've got it, enter it below.

Password  Watch Video

Find More Videos

Up to this point, IKE has been governed by a large committee known as the Information Management Workgroup, initially established as part of NJP’s strategic planning effort. Staff in all job classifications participated. This committee, now renamed the IKE Committee, is still the overall consulting body, however in March 2013 we asked for volunteers to join the smaller “Gang of Six”. (Email invitation below). The Gang was charged with examining IKE’s present organization with regards to tagging taxonomy and to draft the IKE Best Practices document. The resulting Gang has excellent geographic and field office/CLEAR hotline representation and is made up of 5 attorneys and one legal assistant plus Sue Encherman, IKE Project lead.

*We need 2 field office attorneys, outside our committee, for our Gang of Six to set policy and procedure for IKE. The Gang will make recommendations to the whole IKE committee about:*

- *creating a naming convention to be used when posting*
- *consolidating "issue" tags to avoid duplication*
- *adding new tags as needed*

This process of establishing an active, interested, internal governing body was the first step in setting up protocols and best practices for IKE. The Gang made excellent progress with regards to re-examining the “document type” tagging selections to delete duplications and to bring some of them up to a higher level in the taxonomy plus consolidating issue tags under some of the substantive areas of law, primarily public benefits. At the June 20th Gang of Six meeting, the decision was made, as a best practice, to make the tags more broad and versatile, and removing them from appearing under Substantive Law headings. For example, plain “Motion” is a more appropriate Doc Type heading on its own than where it was repeatedly displayed under numerous substantive law areas as Motion to Compel, or a Motion to Dismiss. The document would already have been tagged with the substantive area of law (Family or Public Benefits tag) and just needed the title or description of the document to be specific. As a result, tips on naming and describing documents were included in the Best Practices document and all ‘Motions’ for this or that were eliminated as doc type tags leaving only Motion itself making it much easier and faster to tag.

Other recommendations by Gang members included:

1. Making the system of tags sensible and easy to use now to keep the interest up, encourage posting and growth. If the reorganization gets too drawn out, staff will lose interest and not take advantage of any new, improved organizational schemes.
2. Dashboards have the greatest potential for enabling groups to customize searching for their materials and should be encouraged. These can be built at any time using the template developed by Mark Pace.
3. All methods of locating documents through the Search will only work well if naming and tagging is done properly and thoroughly.
4. We can quickly improve tagging by harvesting some lower-hanging fruit: (duplications)

## **11. What’s New on IKE - Getting the Word Out**

NJP started an IKE e-newsletter in March 2013 to send IKE news, additions, changes and helpful tips to staff. It was warmly received. The e-newsletter will be produced at least every other month if not more often depending on IKE activity. The first 6 editions, March through September are attached. Examples of 2 issues are below.

# What's New on IKE

## *Second Edition*

April 2013

### Breaking News - the Pubs have arrived!



Thanks to Danielle and Mark, all of the WashingtonLawHelp publications have now been posted on IKE. They will now come up in a search.

There is a new **Publications tab** along the top navigation bar: Don't worry- they have been coded so you can open and download the pubs without changing the original by mistake!

Go to the **Publications tab**, hover over **Substantive Area** and **click on the triangle and choose your substantive area of law from the drop down list** for speedy access.

### Changes, Additions, Etc.

- The new colorful IKE homepage is almost ready- look for it soon.
- The Legal Server integration is in final testing and should be ready to use in the next few weeks. A new Legal Server "view" will show columns with information such as county, legal problem code special legal problem code, etc.
- Mark, Brian, James and Sue are meeting with Microsoft next week to show them how far we have progressed with IKE to and demonstrate our Legal Server integration- hopefully we may pick up a few tips!
- Due Process and Jurisdiction have been added as issue tags.
- Temporary Restraining Order (TRO) has been added as a doc type under Litigation.
- Debi has posted the new SAF Due Process cases to IKE - take a look!

An **IKE User Survey** is presently under development. **Your feedback is important!** Look for it next week.

**Need training?** Help is on the way. We will be scheduling IKE trainings for May and June.

# What's New on IKE

## 5th Edition

August 2013

### Big Changes to "Document Type" tags. Please Read!

Great news! The **list of Doc Types on IKE** has been drastically reduced through both consolidating single tags and by creating larger groups. Document types formally listed under specific substantive areas of law have now been put into the general list or deleted. All of the duplicate doc type tags have been eliminated.

Non-litigation documents such as tool kits, checklists and charts can be tagged under the new "Advocate Case Prep Tools" tag. Other new categories include: "Legal Authority: Case, Decision or Opinion"; "Legal Authority Code, Statute or Rule" and "Legal Authority Policy or Practice". **Hover your mouse over the new tags** (titles are longer) and you will see examples of when to use them. Although many tags have been deactivated, all documents have been successfully re-tagged with the appropriate new tag.

**Litigation Documents**, the most popular area under Doc Type, is now the only area you need to expand to see the tags. The Litigation doc tags have also been consolidated and updated. Don't forget- you can use the drop down lists for tagging or type the first letter of the tag in the Doc Type field and select from there.

It is still **VERY IMPORTANT** to describe and name your document in as much detail as possible so that a keyword search will be sure to find it. Also, we encourage you to add info in the **Additional Terms** field.

### Public Benefits issue tags have changed! New "Health/Medical Assistance" issue tags added.

The newly organized and consolidated **Public Benefits** "Issue" tags are now available on IKE. We have added a separate area called "**Health/Medical Assistance**" which now has its own Issue tags. The Public Benefits issue list is now much shorter making it easier to tag. In addition, more specific tags have been added like TANF, SSI, Medicare, etc. to both of these issue areas. Check it out!

## 12. Dashboards

The CLEAR (hotline) staff and field staff attorneys have slightly different needs with regards to information management. Field lawyers have the need to share briefs, pleadings, legal memos etc. Due to the fast turnaround of their cases, CLEAR staff are more "issue" based and need fast on-line resources, and snippets of information on various issues to insert into case notes and letters. As CLEAR is based in Seattle and available, their area or "dashboard" was one of the first to be developed followed by Public Benefits. Mark Pace spent time in the spring of 2012 interviewing and observing all of the CLEAR (hotline) attorneys to see how they work, on line and off, and what resource they needed at their fingertips. A dashboard test pilot site was created in the cloud using the space donated by Microsoft for our use prior to the installation on premise. It was populated with information derived from CLEAR input. Once a virtual local site was

created (<http://sptest>), Mark exported the information to the virtual site and then moved it to the now permanent site. The CLEAR dashboard appears below:

### CLEAR Dashboard

**SCREENING FEED BACK SURVEY**

Bookmark Wikis

- Court Dockets and Forms
- Public Records Sites
- Court Rules Sites
- Referrals
- Court Document Access

Research Websites

- Washington State Statutes
- Washington State Administrative Codes
- Washington DSHS EAZ Manual
- WashingtonLawHelp.org
- WJP Staff Intranet

Program Resources


- Client Eligibility Rules
- WA State Map
- Phone Scripts

Reusable Content

- Snippets
- Letters
- Checklists
- PASSWORDS

Substantive Area Wikis

- Consumer
- Education
- Employment
- Family
- Health
- Housing
- Juvenile
- Tribal
- Public Benefits



AnnouncementView

**Calendar**

October, 2013

S	M	T	W	T	F	S
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

IKE presently is hosting 8 dashboards including CLEAR, Western State Hospital-Tacoma office; Public Benefits and a Childcare Overpayment Team site; 3 SAF (Strategic Advocacy Focus) workgroup dashboards including Drivers License Suspension, Community Economic Development and Administrative Disqualification plus the IKE: Gang of Six area. Dashboards can easily be created and will continue to be used for collaboration in the future. As an example, the Driver's License site alone contains over 100 documents crucial to the committee's work.



### SAF Drivers License Suspension

SAF-DWLS Library	
Type	Name
	^Statewide Results for Tribal Courts 7.30.13
	^Statewide Results of Relicensing Surveys 6.24.13
	062613 Meeting Minutes
	070813 Referral Criteria
	12 0820 Relicensing Questionnaire - Qs - left
	50813 Meeting Minutes
	Aberdeen GAO Allianceone
	Aberdeen Muncipal Court
	Benton District Court Collection Contract with WA Collectors
	Best Practices
	City of Pasco Collection Contract with WA Collectors
	City of Spokane Relicensing Infraction Program 2013 Update
	Clark Co Drivers License Restoration Program



### 13. Best Practices

IKE Best Practices document has been posted on IKE itself as well as the LsNTAP website for use by other programs.



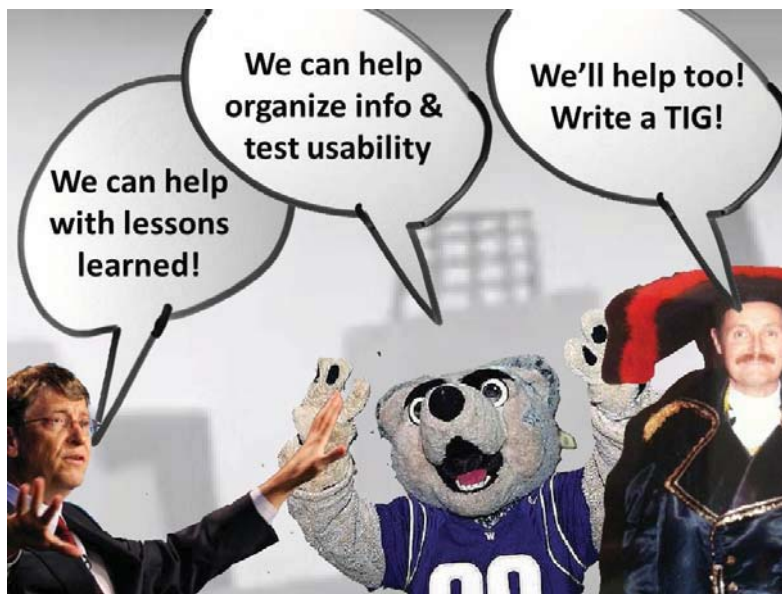
## IKE Best Practices

- **BE GENEROUS!** Share useful information and knowledge with your colleagues. This includes briefs, pleadings, articles, videos, PowerPoint presentations, email strings and more. IKE’s success depends on each of us sharing with others!
- **A GOOD NAME IS EASY FOR OTHERS TO FIND.** Give each resource a clear, descriptive title.  
→**Bad:** *Jones Motion* **Good:** *Motion for TRO Mobile Home Park Closure*
- **BE DESCRIPTIVE!** Name your document in a descriptive way so users have a good sense of what it is about. Use helpful keywords so others will be able to find it easily and know its content in a list of search results.      →**Bad:** *Motion for TRO.* **Good:** *Motion for TRO against landlord forcing tenants out to close mobile home park*
- **ADD TAGS, TAGS AND MORE TAGS!** A tag is a keyword that helps describe the document. Some fields have pre-determined tags found in the drop down menus and some fields are “free form”. Select as many tags or keywords as apply to your document under “Substantive Area”, “Issues” and “Advocacy Resources.” Tags are essential for searching and filtering—without tags, no one else will find the document!
- **ADD ADDITIONAL TERMS.** Add additional information describing your document if not provided by the pre-existing tags. If many people add the same term, it may become a tag! The more terms you add, the easier it is for others to search for and find the resource.
- **SHARE ALL KINDS OF ADVOCACY RESOURCES.** Upload and tag non-case related tools such as articles, training materials, PowerPoint presentations, publications and videos under Advocacy Resources.
- **CHANGE YOUR VIEWPOINT.** IKE has several different “views” to display the information. The default is the NJP view. The “Legal Server view” shows additional information imported from Legal Server, like case number, legal problem code, special legal problem code and county.
- **SHARE DIRECTLY FROM LEGALSERVER.** When adding a document to a case file in Legal Server, make sure the “Sync with IKE” box is checked to share it on IKE. You can uncheck the box for standard forms like retainers, and citizenship certifications. However, share as many helpful briefs, letters, memos and articles as possible!

- **CHECK YOUR DASHBOARDS OFTEN!** Dashboards offer groups working in a specific area of the law or on a special project a place to communicate and centralize their information.
- **DON'T CHANGE OTHER PEOPLE'S DOCUMENTS...** Do not edit or change the substance of a document directly on IKE. Download the resource to your own computer and then make it your own. Re-share your new version (with a new helpful title!) Of course, if the document is part of a Dashboard and group collaboration, this rule does not apply.
- **...BUT DO ADD TAGS TO OTHER PEOPLE'S DOCUMENTS!** Anyone can add tags, and the more tags, the better. After you read a document, add more applicable issue tags by clicking on "edit properties."
- **USE YOUR SEARCHING POWERS!** Enter terms in the search box for best results. You can use natural language similar to a Google search. Refine the search by clicking on selected fields in the left navigation area and narrow the results down by author or document type.

#### 14. Partnerships - With a Little Help from Our Friends

NJP received help from Microsoft, the University of Washington iSchool and LSC (TIG) to make IKE a reality.



The UW iSchool partnership was invaluable. The original Capstone team helped NJP decide on the platform to use - Google or SharePoint. Once decided, they researched the pros and cons of an "on prem" SharePoint installation vs. the newly released cloud opportunity. The interns that followed were instrumental in helping NJP create the initial taxonomy structure as well as perform the usability testing. NJP will continue to partner with the iSchool on this and future projects.

NJP's partnership with Microsoft, as envisioned when the grant was written in June 2011, talked about the sharing of templates. As it turns out, the Microsoft team has been more helpful in



lessons learned, design ideas and troubleshooting some reporting issues. The NJP team, along with some of the Capstone students visited Microsoft early in the process to verify the analysis that had been done with regards to cloud vs. local installation. The Microsoft group agreed that if we were going to use an API to integrate with Legal Server we should install locally as the cloud product was new and the extent of its full functionality with regard to customization was not known yet.

We met on a few occasions in 2012 mostly giving a progress report until July 31, 2012, when the IKE team met with Sheryl Nolan, senior group manager at Microsoft. Sheryl had been working to leverage SharePoint's capabilities as a Document Management System for Microsoft's own Legal and Corporate Affairs department. We met with Sheryl to learn how their employees in the legal department used SharePoint and how Sheryl's team dealt with change management when it was initially introduced. We received valuable advice on how to use tags, cater to different users, and develop policies for uploading and sharing documents within the organization. Among her suggestions, Sheryl believed requiring users to fill in three tag fields or less would make a user less likely to be burdened by the uploading process and more likely to return. We used this advice to reduce our number of tag fields as well as the number of tag options in the Doc Type taxonomy.

She also advised us to recognize our spectrum of users. Thus, participants in our second round of usability tests conducted in the fall were chosen because they had the least amount of experience with SharePoint. Many of the participants in the first round of tests had helped develop the NJP SharePoint site and/or had used it in the past. Additionally, Sheryl suggested designating content managers within the organization to periodically check documents being uploaded to IKE. The content managers would make necessary changes to documents such as adding or removing tags or removing old document versions. This suggestion has been raised by NJP employees as well however we have taken it under advisement due to lack of resources and overburdened staff. Our tentative plan is for a volunteer representative from each substantive area of law to rotate annually as the "watchdog" over their area.

Microsoft recently provided us with some UX (User Experience) materials at our May 29th meeting that may be helpful to us and other programs in creating the look and feel that we want our SharePoint sites to convey. Their Metro Design PowerPoint gives general design tips on topics such as fonts/typography, color, charts, using photos, icons and layout. The LCA Guidelines document communicates Microsoft's own ideas on website (or SharePoint) design and how they market their products to the public. These ideas, demonstrated in the corporate world, can easily be transferred to legal services program and public websites as well as other marketing and outreach materials.

Although Microsoft's contribution turned out differently than initially thought, Mark Pace, NJP's consultant has developed templates for the IKE Dashboards that can easily be replicated by other programs at any time.

## B. Legal Server Integration



NJP has been working with PSTI, developers of Legal Server, for many months on the integration with SharePoint. We have been testing the integration as it has progressed. In addition to the complex API programming, the integration could not be completed until the taxonomy structure was in place as the tables for issues and doc types needed to be the same in both software programs for a successful transfer of information.

The integration is designed to work in two directions:

1. User uploads a document from IKE to IKE and a link to the document is automatically placed in the documents area within the Legal Server case record thereby keeping its relationship to the case;
2. User is in Legal Server and uploads a document to the case documents area in Legal Server. The document appears both in Legal Server as well as in the IKE library with all tagging information.

Direction 1: Testing has been extensive and successful. The integration works as follows:

- User is in IKE
- User manually enters the Legal Server case # into Case# field on the tagging form.
- As they advance to the next field, a pop up asks if you want to retrieve Legal Server information (yes/ no)
- If yes, a Get Legal Server button appears and you click it.
- IKE makes a call to Legal Server through an API and the pre-designated fields are instantly completed on the tagging form (Sub area of law, LPC, SLPC, county, office and court) from the Legal Server record.

- In addition, a document link is placed within the Documents area on the Legal Server case record so the uploaded document keeps its relationship to the case.

The example below is the upload from IKE – the fields in the balloons were brought over automatically from Legal Server (LS) once the case number was entered and Get LS Data clicked. The user then proceeds to select issues, doc types, etc. and saves to IKE’s library.

Edit	
Check In	Cancel
Paste	Copy
Get LS Data	Delete Item
Commit	Clipboard
Actions	
<b>Content Type</b>	Legal Server Document ▾
Name *	hotels.docx
Title	Testing integration from IKE
Rating (0-5)	☆☆☆☆☆
Case Id	13-0646934 <small>Legal Server CaseId - used to map metadata fields to doc</small>
Doc Type *	
Substantive Area	Education;
Issues	
Additional Terms	<small>Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse</small>
AuthorName	
County of Dispute	King
LPC	12 Discipline (incl. Expulsion & Suspension)
SLPC	120 Discipline (private schl)
Office	Admin
Version: 0.1	Save Cancel

Direction 2: This integration works as follows:

- User is in a Legal Server case record
- User clicks Add New Document
- User manually checks the “Sync with Sharepoint button” (This prohibits unwanted documents from cluttering up the IKE library such as retainer agreements, citizenship forms, simple advice letters, etc. which are required by NJP to be uploaded to the Legal Server case record.)
- User selects tags for doc type and issues from the drop down tagging menus only
- Substantive area of law as well as legal problem code, special legal problem code, county, court and case number are added automatically and transferred to IKE
- The document is saved on IKE with a link in the Legal Server case record (All documents are now saved on IKE)

**Legal Server upload form**

The screenshot shows the 'Legal Server upload form' interface. On the left is a sidebar with case information: 'IKE Demo', 'Case No: (13-0646934)', 'Disposition: Open', 'Case Status: N/A', 'Date Open: 05/01/2013', and 'Advocate: Sue Encherman'. The main form contains several fields: 'Document Title' (Testing integration from LS), 'Sync with Sharepoint' (checked, circled in red), 'File Name' (mitigation Legal Assistant - mar 2013.doc), 'Case' (Demo, IKE (13-0646934)), 'Document Type' (Form), 'Author' (Encherman, Sue), and 'Issues' (a multi-select list including Appellate Advocacy, Civil Procedure, Civil Rights, Consumer, - Affirmative Litigation, - Cars, - Debt, - Debt Collection, - Defending a Lawsuit, and - Garnishment). A yellow warning box states: 'If 'Document Title' is empty, the file name will be used.' A note says: 'To replace the existing file, upload a new one.' Annotations include a red circle around 'Sync with Sharepoint', a blue speech bubble pointing to 'Form' labeled 'Doc type', and another blue speech bubble pointing to the 'Issues' list labeled 'Multi-select issues'.

IKE Library:

Type	Name	ID	Issues	Doc Type	Substantive Area	Created By	Modified By	Title	Created
	Homeless Project job Tacoma 2013	322	Appellate Advocacy; Civil Rights; Debt Collection; Pending Lawsuit	Form	Consumer	Sue Encherman	Sue Encherman	testing oct 3	10/3/2013 7:45 AM
	mitigation Legal Assistant - mar 2013	321	Civil Procedure; Civil Rights; Debt Collection	Form	Consumer	Sue Encherman	Sue Encherman	testing integration from LS	10/2/2013 4:01 PM

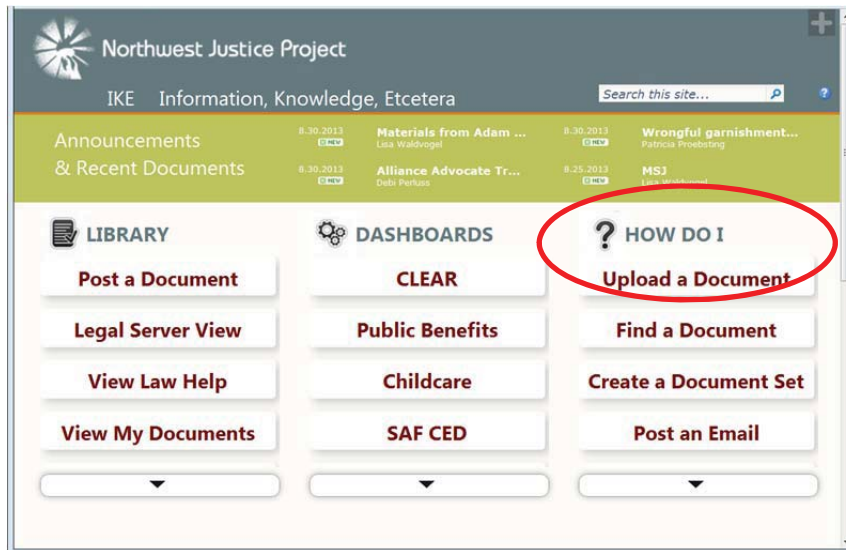
All of the LS info now appears in IKE library

Title	Created	Checked Out To	Date Created	LPC	Case Id	County of Disput	SLPC	Description	Department	Additional Terr
testing oct 3	10/3/2013 7:45 AM			04 Collection Practices/ Creditor Harassment	13-0646934	King	094 Credit Reports			
testing integration from LS	10/2/2013 4:01 PM			04 Collection Practices/ Creditor Harassment	13-0646934	King	094 Credit Reports			

APIs are still being tested with regards to making changes to the SharePoint categories (i.e. adding more issues or doc types to the tagging taxonomy) or to Legal Server categories (i.e. creating additional Special Legal Problem codes) and how to make sure that these changes are updated in both applications. As most NJP attorneys “live” in Legal Server, it is extremely important to have an easy way to upload docs to IKE without having to change programs. Sue Encherman did a successful demo of the integration at the National Legal Server training in Chicago on September 19, 2013 from the test sites. The integration function is being moved to the live sites on October 11, 2013 whereupon staff will receive instructions via the “What’s New on IKE” e-newsletter.

## C. Help!

The online Help is primarily set up using an FAQ format and accessed from buttons on the home page. The FAQ's in combination with the Best Practices guide will form the IKE Online User's manual. Help can be found under the “? How Do I” column. As IKE is organic, updating this area with new questions and answers will be ongoing.



The FAQ topics already posted include:

- How do I upload a document to IKE?
- How do I find a document (Search)?
- How do I create a Document Set?
- How do I post an email to IKE?
- How do I access IKE remotely?
- How do I add or edit tags to a document already on IKE?
- How do I delete a document from IKE?
- How do I get rid of the ribbon at the top of the page?
- How do I add the Legal Server information to my document?

IKE navigation shortcuts are also available from buttons under the Library link in the first column on the home page including:

- Post – brings up the posting form for the main library
- Search – brings up the Search box
- View legal server (LS) docs- brings you to the Legal Server IKE view where imported Legal Server information is visible
- View publications- brings you to a view filtered for all WashingtonLawHelp publications
- View My documents- filtered for everything posted by you



## **V. Factors affecting project accomplishments**

The most important consideration in developing an information management system is the time commitment of not only your tech staff but also the advocate staff. IKE was developed as a tool for advocates to “Improve the effectiveness and efficiency of client services by enabling NJP advocates to share knowledge resources throughout the organization”. In order for this tool to be effective and actually used by staff, the advocates must be involved from the start. Although we had buy-in from the beginning, getting good participation in a busy legal aid office for a tech project was sometimes challenging.

NJP was the first program to attempt the integration between Legal Server and SharePoint. It was crucial to have a SharePoint consultant who could write code for this part of the project as well as for the customization of screens and views. As PSTI had not dealt with SharePoint before IKE, the integration was a learning process on both ends and took more time than originally thought.

NJP is very proud of the IKE development process so far and our accomplishments using SharePoint. Over time, as posting to IKE becomes part of the advocates’ everyday practice, we will be able to judge its true effectiveness.

## **VI. Strategies to address major challenges**

Developing this system is not purely a tech project. It must involve the entire staff and require constant “cheerleading” to get it off the ground and to keep the interest high.

The best piece of advice we can offer other programs wishing to replicate our system is to map out the process;

- Drum up the enthusiasm early (i.e. have a naming contest) ;
- Have Management/Strategic Planning support;
- Create a core committee to work on the project;
- Keep staff updated as to the progress (i.e. What’s New on IKE”);
- Invest a good amount of time in training (multiple times/make a video);
- Contract with a SharePoint consultant especially if you are attempting an integration with your case management system;
- Secure outside help from experts such as the UW Information School students who understand the best way to structure the taxonomy.

Change management is difficult. Future steps will definitely be directed toward evaluating the usefulness of content, changing and updating the taxonomy, perhaps adding different information to the Legal Server fields that are integrating into IKE and increased use of dashboards for collaboration.

## VII. Major Lessons and Recommendations

Developing an information management system is a huge project and takes a huge amount of time. It is not over at the launch - it is an organic system that will continue to grow in content, be re-designed and take new directions. SharePoint is a very powerful and complex software and you need someone available who understands its bells, whistles and deficiencies.

Lessons learned and recommendations include:

- Map out your plan of action;
- Form a core committee and schedule meetings for the year or two in advance so you can make sure to meet;
- Contract with a consultant who knows the software and knows how to write code;
- Give it a snappy name;
- Use the system before you launch or start an integration to make sure your taxonomy is solid;
- Let your “advocate or substantive law groups” develop their own tags - do not make everyone comply with the same structure;
- Encourage your advocate groups to go back and re-evaluate and consolidate tags after an initial use period;
- Use every occasion to ask someone if they have posted to the system (intercept emails asking for information or resources);
- Make the system easily accessible over a browser in the office and remotely;
- Make the system internal so no redacting is necessary;
- Make the system easy to use and quick to upload information;
- Train extensively and repeatedly on posting and search (create a video!);
- Have your tech staff involved from Day 1. Have them learn the ins and outs of the software- send them to training;
- Get help from library or iSchool students for taxonomy creation as well as usability testing;
- Keep the staff informed about new additions or changes;
- Continue to check your initial User Survey for improvements and suggestions- do a second survey after a year or so;
- Have a designated staff person to be system “Cheerleader” to keep the enthusiasm going, move the system forward, field suggestions and questions;
- Get your case management vendor involved from the beginning- they can be a wealth of good ideas!

NJP is very proud of IKE and believe we have produced a solid system. IKE will be easily replicable by other LSC programs and we are more than happy to assist. IKE has been demonstrated to many programs already and has been the subject of numerous presentations at national conferences including the upcoming 2014 TIG conference. We are happy to spend time with any program wanting help or information.

We would like to thank the Legal Service Corporation and the TIG staff for awarding NJP the funds to develop IKE allowing our advocate staff to work more efficiently and effectively for our clients by giving them the technology needed to share their work product and valuable resources statewide.