Post Implementation Review

Libraries Australia

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Post Implementation Review

Libraries Australia

1. Introduction
Following the completion of the Kinetica Redevelopment Project, the National Library of Australia (the Library) has undertaken a post-implementation review (PIR) of the new system. The high-level outcome of the project was the establishment of the Libraries Australia Service with the production implementation of the redeveloped system occurring in November 2005. The new system consists of four core modules:

- Cataloguing – the bibliographic sub-system;
- Search – the search and products sub-system;
- Administration – customer management sub-system; and
- Document Delivery – the document delivery sub-system.

1.1 Purpose
The two objectives of the review were to:

1. ascertain whether the Kinetica Redevelopment project has achieved its objectives and addressed the original business requirements; and
2. gain an understanding of the project process in order to identify any shortcomings with a view to improving the process for future project activity.

1.2 Approach
The PIR has been undertaken in broad consistency with the methodology described in *A Methodology with Quality Tools to support Post Implementation Reviews* (T. L. Woodings and J. E. Everett, Proceedings of 10th Australasian Conference on Information Systems, 1999). The use of standardised checklists and interview scripts, to provide a structured method for collecting data and feedback information, is a key feature of the referenced methodology.

1.3 Process
The review process has been undertaken in accordance with the PIR plan. The PIR team have:

- determined key elements of the project, including an examination of project documentation and reports to identify project metrics and success criteria;
- developed and agreed standardised questions and data collection tools;
- identified stakeholders and review participants;
- used face-to-face interviews and email surveys to obtain information from a selection of: Project Team Members, Client Representatives, and Users;
- collated and analysed response data for common threads and consistency;
- followed-up with interviewees and Project Board to resolve conflicting views and pursue further information as necessary;
- assessed and evaluated implications of the data collected and potential remedial options; and
- presented the findings and recommended actions in this report.
1.4 **Boundaries**
As agreed in the PIR plan, the review did not include a product review, attempt to identify software defects, or test any aspects of the software or components.

1.5 **Analysis**
Interviewees provided a rating (on a scale of 1 to 5) and their comments in relation to each question. Responses to all questions were collated and analysed to identify common threads and consistency across interviewees.

Due to the relatively small data-set, the project team undertook no formal statistical analysis of the data collected. Key common responses are documented in this report in section 2, *Findings and Recommendations*. More detailed information regarding the interviewee responses can be found in Appendix: *Summarised Response Information*. 
2 Findings and Recommendations

2.1 Major Areas of Success
The outcomes of the review confirmed that, in general, the Library had achieved its broad objectives in delivering the Libraries Australia Service (LA). Users have commented that the resultant system is easy to use and provides improved functionality to support their role.

Particular areas that users noted were the improved search functions, intuitive user interface, better presentation of information, additional details on local and external holdings, and better response times. Both project staff and users sense that LA is a more supportive and reliable system than Kinetica.

Project staff had a positive attitude towards the overall project plan. The project scope was clearly outlined and managed; in particular the structured team plans. Many respondents commented on the commitment from management and the regularity of meetings which contributed to the project management. An outcome of these meetings was that the project plan was updated and revised on a regular basis with the adoption of appropriate approval processes.

2.2 Areas for Improvement
The following areas for improvement were noted.

2.2.1 Data Integrity
The discussions that were held with user representatives highlighted concerns with the quality and integrity of data on the system. Users have observed the following data-related issues:

- incomplete data, including:
  - missing records;
  - incomplete or inconsistent fields within records; and
  - item records with no holdings attached.
- duplicate item records; and
- out-of-date record data.

Users have reported that these issues have significant impact on the usability of the system; especially when they are searching for particular items. Feedback from one user was that this issue was particularly concerning for general public users, who may not be as well-informed about the holdings data as a more experienced user.

Several users commented that data quality would, in the future, depend heavily on the data that is input by contributing libraries, and that consideration should be given to developing guidance on the standards for data entry and the quality expectations of the Library.

**Recommendation 1:** Data integrity and quality issues should be resolved as a matter of priority.

**Management Comments:** Data quality issues are a priority for the Libraries Australia service now that the Project has been completed. Some users may not have
been aware that: data quality issues were not dealt with during the Project, as they were not within the scope; item records without holdings are normal and valid data; and guidelines covering data entry and quality standards are already made available on the Libraries Australia website.

2.2.2 Support and Help Desk Operations

The majority of comments in relation to the support and help desk operations were positive. Users noted that minor incidents have been resolved as quickly as possible and that helpdesk staff have provided some strong support.

While the Library does have a process for managing incidents, users have commented that they have experienced difficulty in contacting the help desk because of long waiting times in the call queue. Others have noted that, once connected, they are often passed between several operators in order to resolve an issue.

The main area of concern for some users was in the area of communicating progress on the resolution of more complex issues. Users commented that they were not kept informed of the follow-up or escalation actions which were being undertaken to resolve the reported problems.

**Recommendation 2:** Enhance the Library’s incident tracking and problem resolution process, so that users are aware of the expected timeframe to resolve the problem and are informed when their incidents have been resolved.

**Management Comments:** The Libraries Australia Help Desk has now adopted Support Wizard, which is enhancing our incident tracking capability. Our problem resolution capability has been strengthened as a result of completing a Service Level Agreement with the IT Division. Management will investigate whether there is adequate follow through on calls to the Help Desk.

2.2.3 Communication with Users

Users agreed that the Library had promoted the release of the *Libraries Australia Service* prior to its implementation and that they were generally aware of the changes that would be delivered. Some users commented that more focus could have been given to specifically preparing users for the proposed changes, while others believed that user consultation should have been more comprehensive.

The area of ongoing communications was highlighted by users as an area for improvement. The Library provides a large amount of information to users and suggestions for improvement related to better filtering of that information to reduce “noise”. While users believe that the use of the listserv is an appropriate mechanism for discussion and the sharing of ideas, their comments indicate the need for more targeted communication in some instances.

**Recommendation 3:** Consider more targeted methods of communication with users, so that information is relevant to their user role and context.

**Management Comments:** This recommendation will be noted for future projects.
2.2.4 Project Planning

Generally, project staff representatives were of the opinion that the project was well planned and executed. They did, however, highlight issues around the project timeline and staffing levels during the second stage of the project, as well as team-level project planning.

Due to the high level of pressure to complete tasks on time, project staff believed that the quality of the solutions implemented was compromised. They were also concerned that the project was deemed to have been completed before some critical parts of the project scope were implemented (see Section 2.2.6).

Project staff highlighted that an improvement in team-level project planning may have reduced the pressure placed on them in the latter part of the project. They agreed that there was a need for more detailed planning within each team, as well as more integration of the team-level project plans with the overall project plan.

**Recommendation 4:** For future Library projects, consider ways to better integrate and synchronise the team-level and overall project plans. This will allow for interdependencies to be recognised throughout the project.

**Management Comments:** This recommendation will be noted for future projects. The Project was operating under an external constraint, namely the need to complete by December 2005 in order to avoid cost penalties by extending the support contract with IBM Global Services. This led to significant pressure in the closing stages of the Project and the need to accept some defects in the solution as implemented. Almost all of these defects have now been corrected.

2.2.5 Project Communications

Overall, project staff agreed that communication between project managers and team leaders was good. Interview responses indicated that the main areas of concern were communication between project teams and between project staff and management. Comments indicated that, for future projects, better use could be made of the issues log to encourage project staff to record issues or impacts of particular implementation changes.

Project staff outlined some scenarios where there was confusion or lack of awareness of the project status and changes. This resulted in uncertainty surrounding team responsibilities for particular implementation activities.

**Recommendation 5:** For future Library projects, ensure that key decisions are effectively communicated to implementation-level project staff.

**Management Comments:** This recommendation will be noted for future projects. However it is noted that weekly Team Leaders and team meetings were held throughout the Project, which should have provided effective communication to project staff.

**Recommendation 6:** For future projects, encourage project staff to record issues for consideration using the project issues log.

**Management Comments:** Project and Sub-project Issues Logs were maintained during the Project. In future projects, the Library will ensure that all project staff are fully involved in accessing and contributing to the issues logs.
2.2.6 Functionality Delivered

Users and project staff expressed complementary views surrounding the project scope. Some users expressed dissatisfaction with the absence of certain critical functionality, especially batch upload, while project staff showed concern about the delivery of an incomplete implementation of the project scope.

Comments from users indicated that the lack of some functionality not only caused inconvenience, but resulted in an increased work load and data currency issues (see Section 2.2.1). Additionally, some project staff expressed disappointment because it was not possible to deliver a complete, fully-functional and high quality product to the users at the time of release. Another key concern raised by project staff was that aspects of the project were still being finalised at the time of this review.

Users commented that the Library needed to better understand the different needs of the various users, and that a greater level of user consultation might have been helpful in addressing this issue. This was noted in relation to the provision of the public search facilities, which resulted in a change to the user base.

It should be noted that the Library has identified, in its *End Project Report*, a set of post-project tasks that will need to be undertaken in order to achieve all the initial project objectives.

**Recommendation 7:** As planned during 2006/07, address any outstanding functionality in the project scope as a matter of priority.

**Management Comments:** Several of the tasks listed in the End Project Report were not defined as mandatory requirements in the original project scope. Those that were (such as a single sign on for use of the web cataloguing feature) are being addressed as priority tasks.

**Recommendation 8:** For future system releases and other projects, assess and prioritise key functionality described in the project scope in consultation with the user community.

**Management Comments:** This recommendation will be noted for future projects. There was extensive consultation with the Kinetica user community during 2002 and 2003, before the project scope was finalised. However, the Library will consider whether more should be done in future projects to rank the key functionality in consultation with users. The post-project tasks, and user feedback, will be incorporated in to the Libraries Australia Business Plan.

2.2.7 Other Issues Noted

Listed, below, are some of the comments that were also provided during the interviews. These issues related to specific system problems or user experiences.

- WebCat interface users are required to log into the system twice which is considered inconvenient when creating or editing records.
- The two different search engines often produced different results.
- Users experienced problems with record import and batch operations, which caused backlogs in their work.
• Internal users of the Record Import Service (RIS) are required to run bulk upload tasks outside business hours in order to avoid system performance problems.
• Some training was conducted when the system was incomplete. Subsequent changes to the system meant that users were not trained on the system as implemented.
• The cost of training was seen as a limitation for some external users.
Appendix – Summarised Response Information

Listed below are the collated responses to the standardised questions. Key comments have been provided to support the rating responses, which were on a scale of 1 (low) to 5 (high).

**USERS**

1. How well does the LA support your role?

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Strengths
- Creation of accounts, invoicing and search functions are much better than Kinetic.
- LA is a great improvement and a much simpler system.

Weaknesses
- Backlogs in bulk record uploads caused by upload functionality not fully working (time-consuming due to re-doing uploads).
- Document Delivery does not match the inter library loan module (eg ANU document delivery system). This creates an increased work load due to double data entry.
- Initially, Cataloguing Client (CC) was unavailable until March. This was a great inconvenience when CC consists of 60% of their daily work load. CC was also inadequate and users relied on the helpdesk for many problems.
- The public LA version does not allow advanced search, therefore, LA staff have to be careful when directing people over the phone.
- Difficult to access reporting function. Many users need to rely on IT staff to run a query and extract reports required. This function has not yet been delivered.
2. How easy is the system to use and follow?

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Strengths
- LA is more responsive than Kinetica.
- LA search function is much easier and simpler to use. The option to use advanced search is a great improvement.
- The ability to have access to contact details of other libraries is very convenient when users require details about holdings.
- Different search options makes searching much easier. These include, basic, advanced and browse.

Weaknesses
- Help function provided by LA is difficult to use, in particular navigation through the help screen.
- LA session time is too short. Users are required to login again after 30 minutes. This is inconvenient when users are in the middle of record creation.
- The WebCat interface requires users to log in twice.
- Functionality of external user accounts is a complicated process and lacks clear documentation.
- Level of searching is cumbersome and the default for search results is problematic.
3. How well is the data and information presented? (Format suitability)

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Strengths
- Search results are well presented.
- The ability to identify records relating to local holdings is much better.
- The option to view results in different form is a very useful function (i.e. short view, long view and librarian advance view).
- Cataloguing Client is much better for specific searches.

Weaknesses
- Difficult to limit search results.
- Results need to be listed in a logical order, such as date.
- The screen layout is not user friendly, there are too many features.
- More than 10 search results should be displayed, by default.
4. How reliable is the data contained in the system?

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*External users who use the Cataloguing, Search and Administration Modules of LA found the data unreliable.

**Strengths**
- Data contained in the LA system is much better than Kinetica.

**Weaknesses**
- The data contained in the system lacks currency.
- There are many duplicate records due to a problem with the matching mechanism.
- There appears to be problems with authorities.
- Junk data has not been removed from the system.
- Some records lack detail with incomplete fields or no holdings attached.
- Foreign records are not as reliable as Australian records.
- Different results are displayed when using different search functions.
5. How satisfactory are the response times?

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![How satisfactory are the response times?](chart.png)

**Strengths**
- LA response times have improved from Kinetica.
- Updates respond instantaneously.
- Cataloguing appears to be quick and stable.

**Weaknesses**
- Delays are experienced when requesting documents.
- Search results take time to display.
- User required to log back into the system after 30 minutes.
- Slow reporting function.
- Problems with record imports due to batch function slowing down the system.
6. How adequate and responsive are the system support services? (Eg Help Desk)

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How adequate are the system support services?

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How responsive are the system support services?

*External Users who used the Search, Cataloguing and Admin modules of LA found the help desk support inadequate.

**Strengths**
- Currently, help desk listen to user concerns and solve problems as quickly as possible.
- Internal users are physically located close to the help desk.
- Strong support provided once connected to a help desk consultant.
Weaknesses
- Some users are unaware of Helpdesk’s role and how they can provide assistance to users.
- Helpdesk are not proactive in providing information to users when problems are recognised or changes are made.
- When LA was introduced, Helpdesk consultants also lacked the understanding and knowledge required to assist users.
- Users have difficulty contacting the helpdesk.
  - Only one e-mail address and contact telephone number.
  - Long waiting time before speaking to an operator.
  - Constantly being passed between phone operators.
- Helpdesk staff do not follow up issues and are unlikely to resolve a problem unless several users are experiencing the same problem.

7. What is the level of System availability?

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Strengths
- High level of availability during business hours.
- Users are notified when LA is unavailable and problems are rectified quickly.

Weaknesses
- Users are unaware when the system is unavailable. Lack of communication to notify users if any problems are experienced.
- When there is an occasional system outage the system takes a long time to recover.
- Outages are unusual however if they occur they often do not relate to the system itself.
8. How adequate is the level of security provided by the system?

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**Strengths**
- The security provided by LA ensures other users cannot touch other user holdings.
- Password access appears to be strong and meets user needs.
- LA times out after 30 minutes if it’s not being used.

**Weaknesses**
- When using CC, LA system requires users to log in twice.

9. How adequate and timely was training provided?

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* Lack of training for Administration staff (Internal Users)
** No training provided (internal and external)
### How timely was training provided?

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* Tasks and Functionality for search and cataloguing didn’t work during training (External user)

### Strengths
- Training was focused at the right level of difficulty.
- Documentation provided (manuals and pamphlets) were a great help before and during the training.
- The use of client and test databases helped broaden user understanding.
- The mix of practical and theoretical explanations improved users understanding.
- Training was provided before the LA system was implemented. Changes made after training were not covered.

### Weaknesses
- Training was outsourced and many users were unaware of the training opportunities.
- Many tasks and functions didn’t work during training.
- Changes were made to the system after training and users were not notified.
- Users feel that the helpdesk support is much more beneficial than the training provided.
- The cost for training is a limitation and as a result users encourage in-house training.
- Users would have preferred training to be spread over a longer time frame and broken into smaller sub sections.
10. How adequate is the system documentation and related guidance?

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**How adequate is the system documentation and related guidance?**

**Strengths**
- Users were provided with a guide on “How to” to use the system.
- Search manuals are detailed and are very helpful.
- Training packs were provided to users.
- Information on the Libraries Australia website is very comprehensive and updated regularly.

**Weaknesses**
- Manuals are constantly updated. Users are unaware of any changes and new editions created.
- User manuals are not adequate.
- Documentation has not been provided for administration users.
- Documentation lacks detail at field level (eg particular service).
- Standards within documentation have not been maintained and are out of date. (eg data entry requirements).
- Documentation for users has not been completed due to a tight time frame.
11. How effective is the current communication?

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**How effective is the current communication?**

![Graph showing responses](image1)

**Strengths**
- Strong current communication with NLA via standards channels.
- Users are notified of any changes and developments.

**Weaknesses**
- External users feel that communication could be improved.
- Weak post implementation communication. Users were unaware of how to use the new system. The user manuals were not helpful.

12. How effective was the communication from NLA during the redevelopment project?

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**How effective was the communication from NLA during the redevelopment project?**

![Graph showing responses](image2)
Strengths
- Weekly staff meeting between senior staff and teams.
- Users were aware of the re-development timeline and date of release.
- Promotion of LA was well done.
- Lists were regularly updated with important and relevant information.
- Adequate information provided for external users and the KRP team were able to answer questions quickly.

Weaknesses
- Users were only aware of the positive aspects of the redevelopment. Users were unaware of any problems or issues experienced.
- At times there was too much information and users were unaware of current news.
- The details of the project plan were difficult to understand.
- Users were unaware of the deliverable at the end of the project. There was too much under wraps.
- User would have preferred more consultation with project staff.
- Project staff did not provide information on the progress of new redevelopment project.
- Users could not provide input to the development of the project plan.

13. How adequate was the change management?

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Strengths
- Kinetic continued to run parallel during implementation of LA.
- Implementation did not have a great impact on operations.
- Group meetings were conducted to keep users informed of the implementation process.
- Promotion of product was well done.
Weaknesses
- Poor customer service provided over the first 2 months after implementation.
- Project staff focused on the public more than internal users.
- Once users lost access to the Kinetica Cataloguing Client it took a few weeks before the LA CC was accessible.
- Project staff should have communicated change management to users in much more detail.
- Not enough focus on awareness.

**PROJECT STAFF**

1. How adequate was the project planning?

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![How adequate was the project planning?](chart)

Strengths
- The project scope was clearly outlined and managed.
- Project staff revised and updated the plan on a regular basis with appropriate approval processes.
- Strong checking and testing.
- Each team had a structured and detailed plan.
- Weekly meetings were conducted within teams and between management.

Weaknesses
- Insufficient time and resources allocated.
- Project staff did not rely on plan when experienced difficulties.
- Aspects of the plan were forgotten or not covered due to a lack of communication between teams.
- Upward communication problems which led to problems not being recognised.
2. How well were the changes to the project managed? (Eg scoping changes, time changes)

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**Strengths**
- Issues that required changes were discussed at weekly management meetings and signed off by project board.
- Project plan updated with any changes made by management.
- Any specifications within the project plan were revised and documented.

**Weaknesses**
- Staff were unaware of the impact of changes on resources.
- Problems were not recognised due to teams working independently and lack of upward communication.
3. How well do you think the project has been finalised? (Documentation filed, team members appraised and reassigned, success and completion communicated)

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How well do you think the project has been finalised?

Strengths
- The project plan was completed.
- Post implementation review carried out to analyse the success of the LA.
- The project was completed on time and under budget.
- Final details of the project plan were finished and tidied up.
- Management recognised the efforts of the teams.

Weaknesses
- Tension built up between staff after the implementation of LA. Only a limited number of project staff were chosen to continue with the maintenance and enhancement processes.
- Documentation for project staff and users has not been finalised.
- Tasks were given lower priority due to tight time frame, lack of resources and complexity. Therefore these tasks are still being completed after implementation of LA.
4. How aware were the project team of the project status? (i.e. communication)

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![Graph showing awareness of project status]

**Strengths**
- Weekly communication within teams (sub-managers and their teams), between team leaders, and between managers and board.

**Weaknesses**
- Project Team members were not aware of the detailed project status (lack of downward communication).
- No clear upwards communications channels.
- There was a lack of cross team communication. This led to teams working independently and unaware of how their actions would impact other teams.

5. How adequate were staffing levels for the activities required for the project?

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![Graph showing adequacy of staffing levels]

**How adequate were staffing levels for the activities required for the project?**

Responses (14)
Strengths
- Project staff who were aware of the low staffing levels.
- Project staff who were employed in-house were much easier to maintain.
- Despite NBU all other teams had adequate staffing levels.
- IT development never had problems with staffing levels.

Weaknesses
- Project staff levels were inadequate considering the complexity and amount of work required to complete the project.
- Project staff experienced work overload.
- Project teams focused on their own needs rather than needs of the overall project, this resulted with some teams lacking key resources.
- Project Staff identified key areas with lack of resources:
  - Maintenance and deployment,
  - NBU
    - CBS team
    - Cataloguing
  - Required IT resources,
  - Business Analysts,
  - Web designers.

6. How appropriate were staff skill sets to deliver the project?

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How appropriate were staff skill sets to deliver the project?

Strengths
- Project management had access to people with high level of expertise.
- Project staff were recruited externally where internal staff could not meet skill set requirements.
- Project staff were adequately skilled to deliver the results required.
- Programmer and business analyst skills were at a very high level.
Weaknesses
- Skill sets requirements were not clearly identified before starting the project (eg IT, technical).
- LA would have benefited if flexible project staff with multiple skills were available.
- Where internal staff skill sets did not meet requirements, project management should have employed project staff externally.
- Lack of specialised project staff.

7. How well have the operational procedures been developed and implemented?
(Documentation, published and distributed) Give Examples

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How well have the operational procedures been developed and implemented?

Strengths
- Strong monitoring by management to ensure operational procedures are developed and implemented.
- Many tests and implementations were carries out before LA was delivered.
- Policies and manuals were documented and delivered for both internal and external users.
- Management introduced enhancement controls.

Weaknesses
- Outstanding system documentation, in particular where implementation of LA is incomplete.
- CBS operational procedures and administration are still being developed.
8. How well are system controls being applied?

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Strengths
- Strong management processes.

Weaknesses
- Match and Merge procedure is still being implemented.
- Some of the backups created for LA has not been fully tested or trialled.

9. How adequate was the staff training where existing skill sets did not meet the needs?

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Strengths
- Training had a practical focus.
- Experienced trainers who had a strong knowledge of the new LA system.

Weaknesses
- Too much information in a short period of time.
- Difficult to maintain information content.
- Language barriers where staff lacked the basic understanding.
- Project staff experienced a steep learning curve, in particular operational training.

10. How easy is it to enhance the system?

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Strengths
- The software used to create LA is configurable.
- LA has already been updated several times.

Weaknesses
- Significant structural enhancements to LA require re-writing code and further assistance from the vendor.
11. How easy is it to maintain the system?

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**Strengths**
- LA will still run effectively without changes.
- Where knowledge remains in-house LA system is much easier to maintain.

**Weaknesses**
- Project staff are unaware of the time and resources required to make significant modifications.
- Staff are not willing to learn about CPS system because it is a unique system with a generic language and difficult to use knowledge acquired in other organisations.
- Maintaining CBS with upgrades can override previously fixed functions.
- Coding was left incomplete due to time restrictions.
- System has major flaws which require significant maintenance resources.
12. How reliable is the data contained in the system?

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Strengths
- Data was captured successfully with minimal migration issues.
- Experienced cataloguists have created highly structured and rich data.

Weaknesses
- Too many cataloguists therefore there is a lack of control over the currency and quality of data.
- Data contained in the system has not been reviewed.
- Data not reviewed or changed when transferred therefore there are many duplicates recorded in the system.
13. How satisfactory is the response time?

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How satisfactory is the response time?

- **Strengths**
  - Performance testing helped improve LA response time.
  - Strong search response time compared to Kinetica.
  - Quick Indexes.

- **Weaknesses**
  - Batch operations impact on IT system, cannot do batch within business hours.

14. What is the level of system availability?

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Strengths
- Project staff have not experienced any unplanned system outages.
- LA is available when required.
- LA has provided improved functionality and options to project staff users.

Weaknesses
- Issues experienced with memory loss and delayed delivery of files.
- Lack of availability due to problems with the library not the system itself.
- Ongoing maintenance and effort required to provide a high level of system availability.