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## INSIDE:

### *From the Officers*

OBS-SIS.....	3
TS-SIS.....	4

### *Columns*

Conference Round-up .....	1
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### *Reports*

AALL Keynote Address.....	9
Data Visualization .....	25
Deep Dive: Clean It Up! .....	19
Deep Dive: DIY API.....	13
Do More With Less .....	15
I Know It Used To Be There....	20
Innovation Tournament.....	26
OCLC Update .....	19
OBS-SIS Hot Topic.....	23
Online Security: .....	17
Process Improvement.....	22
Making the Case for Structure .	18
Regex Rules! .....	9
Technology Contracts .....	10
Things You Need to Know.....	24
TS-SIS Marla Schwartz .....	5
TS-SIS New Member.....	6
TS-SIS New Member.....	7
TS-SIS Experienced Member ....	8
TSSL Annual Report .....	31

## CONFERENCE ROUND-UP

*Jackie Magagnosc  
Cornell Law Library*

Welcome to *TSSL*'s inaugural "Conference Round-up" column. The goal of this column is to facilitate sharing of conference experiences beyond AALL's Annual Meeting. Whether at a national conference such as ALA, a regional conference, or a local workshop, there is a wealth of information being shared that can be reported back to our peer technical services law librarians. If you have the opportunity to attend a local, regional, or national conference or workshop with content of interest to technical services librarians, consider providing a brief write up for *TSSL*.

### **Demystifying Digital Preservation**

NASIG 2019  
Courtney McAllister  
Yale Law Library

As a newcomer to academic law librarianship, I've discovered several knowledge gaps I need to fill. Digital preservation is one of those areas. In my former role at a liberal arts college, our work in technical services revolved around meeting immediate needs and responding to current users' requests. Now that I am a part of a technical services team with a different philosophy, sustainability and long-term access are much more prominent in my daily life. Thankfully, during NASIG's 2019 Conference, Shannon Keller (Helen Bernstein Librarian for Periodicals and Journals at New York Public Library) delivered an excellent presentation entitled *Demystifying Digital Preservation: Recommendations for Organizations, Libraries, and Information Professionals*.

During the session, Keller reported on the Digital Preservation Task Force's recent activities. As the name suggests, this Task Force was organized by NASIG to examine the broad landscape of digital preservation issues, raise awareness about the threat of digital data or information loss, and advocate for partnerships and practices to address pressing questions such as:

- Who is responsible for ensuring perpetual access to born-digital and digitized materials?

*Continued on page 27*

*A Publication of the Technical Services Special Interest Section and the  
Online Bibliographic Services Special Interest Section of the American Association of Law Libraries*

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# Online Bibliographic Services Special Interest Section

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I think most everyone has heard some form of the phrase, “With great power comes great responsibility.”

While I definitely do not picture myself as a superhero, I feel the position of Chair of OBS does come with a substantial amount of responsibility—to the SIS members, to the larger AALL community, and to those who will next hold this title. Jennifer Noga and Jackie Magagnosc (respectively outgoing Past Chair and Chair) have done a brilliant job leading this section over the past two years, and I am incredibly grateful for their guidance, leadership, and service. We are very fortunate to have Jackie continuing on the Executive Committee as Past Chair, as I know her assistance and advice will be invaluable. I am humbled and admittedly slightly nervous to take on the role of Chair because I do not want to mistakenly slow or impede this section’s growth. Thank you all for trusting me with this responsibility!

I want to take this opportunity to thank Jason LeMay, who just finished his two-year term as a Member-at-Large, and Barbara Szalkowski as she returns for her second year serving as a Member-at-Large. Extra thanks to Barbara also for organizing another successful “dine-around” this year. I look forward to continuing to work with Kevin Carey, transitioning from Treasurer/Secretary to Vice Chair, as well as new Board members Elizabeth Manriquez (incoming Secretary/Treasurer) and Heather Buckwalter (incoming Member-at-Large). The outgoing committee chairs also deserve special recognition for their efforts and accomplishments this past year, just as the incoming (or returning) chairs deserve thanks for volunteering to serve. What makes this section so great are the people who are always willing to share their experiences and knowledge with each other. This is especially true of those who step up to serve in leadership roles, and I sincerely thank you all!

At this year’s meeting in D.C., OBS sponsored two very successful programs, on *APIs* and *OpenRefine*, and another well-attended Hot Topic on *Systems Migration*. For the second year in a row, systems migration was a particularly relevant topic. If this is something you want to see again next year, please let us know, and the Education Committee will continue to make it a priority.

At this year’s Business Meeting, we discussed some results from the most recent OBS Membership Survey about the name of the section and ideas for rebranding. A brainstorming session of small groups at the meeting came up with some great ideas. We will be polling the larger membership about these new naming possibilities and how they might better reflect the purpose of our section and better align with our mission statement (see the Object of OBS on our website: <https://www.aallnet.org/obssis/about-us/procedures-manual/bylaws/>). We also will be permanently moving the OCLC update forum online, as opposed to having it in person at the meeting. Please be on the lookout for information about this from OCLC Committee Chair Christopher Thomas.

By the time you are reading this, the Program Proposal site should be open. The deadline to submit is the 1<sup>st</sup> of October, and I can assure you the Education Committee will be taking the “must haves” that come out of IdeaScale and designing some excellent programs for New Orleans next year. (See <https://www.aallnet.org/conference/resources/proposing-a-program/proposal-process-timeline/> for the full 2019-20 program-planning calendar.) Again, we are here to serve you, so if there are certain topics you are passionate about and want to ensure they find a place in next year’s program, please let us know!

Lastly, though I don’t imagine any of us feel like we have the capacity to put more on our plates than we currently have, I also believe we are each capable of much more than we think, and often, it takes being responsible to more than just ourselves to push us to this realization. This capacity is amplified when we work together toward a common goal, and so I hope you will all join us as in our efforts to make OBS (or whatever we may call it in the future) the best it can be for everyone.

## **OBS Biannual Membership Survey Results**

The bi-annual OBS Membership Survey for 2019 was open from February 14 - March 13. There were 85 unique responses, with varying completion rates on each question. This is up from 59 unique responses on the last membership survey in 2017.

Almost half of the respondents have been working in law libraries for more than 20 years, though almost the same number indicated that they have been a member of OBS for no longer than 10 years. This may highlight an opportunity for OBS to engage more with new librarians early on in their careers.

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The most section overlap of OBS members continues to be with Technical Services (TS-SIS), followed by Academic Law Libraries (ALL-SIS), Computing Services (CS-SIS), and Research Instruction & Patron Services (RIPS-SIS), as the majority of respondents indicated they work in an academic setting (law school library).

While most respondents are still using Innovative for their ILS, we are seeing more and more users of Alma and some other ILS platforms, and we will likely see more since over one-third of respondents also indicated that their library is considering moving to a new ILS.

Free-text responses to some questions also identified some areas that the Executive Committee will be working to address in the coming year, including communicating better with the section about more than just the annual meeting and sponsoring new online learning opportunities (such as webinars) when possible.

Some respondents shared that OBS doesn't do enough to differentiate our section from TS-SIS and other sections where there is some overlap of mission or focus. The Executive Committee hopes to address this through our continued discussions about repositioning and rebranding the section to better align with member responsibilities and interests.

The complete survey and summary of results will be made available on the OBS website, at <https://www.aallnet.org/obssis/resources-publications/membership-survey/>

*Jessica Pasquale, OBS Chair  
University of Michigan Law Library*

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## *From the Chair*

# T echnical Services Special Interest Section

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I'm writing this in between information sessions for my new librarian hire and am reflecting on all the technical services positions that were posted this past year or two. It's truly encouraging to see these positions are being filled instead of phased out, which makes me confident that our future is better. Many of these positions combined traditional technical services duties, such as acquisitions and cataloging, with new work—electronic resources management, institutional repository management, and scholarly resources.

This is the exciting future for technical services librarians—moving into new areas to show our strengths and develop new ones. Everyone wants a metadata specialist working with their IR to ensure that all of their faculty's work is represented, especially since the announcement that U.S. News is planning to evaluate each law school's faculty in terms of scholarly productivity and impact. Of course, each journal has a different way of representing an author's name in its publication, and IRs commonly don't keep track of this information. TS librarians know how to deal with this and ensure that their IRs are consistent—in traditional cataloging, we called this authority work. Now, instead of working with OCLC and LCNALF, we will work with William S. Hein & Co. to establish name records.

In addition to familiar work with new players, there is also brand-new work—collecting metrics for databases and analyzing their use, working with new foreign vendors of legal materials, increasing responsibilities as system administrators, and development teams for new systems. Catalogers are being asked to work with languages they don't speak or read, yet the work must be done somehow. As has been the case for many years, TS members have been working together to help each other, teach and train each other, exchanging favorite sources of information or translations, and encouraging each other when the database links suddenly don't work and suddenly everyone needs to use them.

So, what would we be without our TS and OBS colleagues? Or any of our Special Interest Section colleagues? Think of the programs we've had the last couple of years at the annual conference. The hard work of our Education Committee shows—programs take time to develop and curate. It's a source of pride to be asked to be a speaker on a program or a trainer at one of the pre-conference workshops or a deep-dive program. But let's not stop here; every year, the question of how to value our work appropriately comes up, whether in our own library, our SIS, or even our association. We need to keep up our training so we can attend to the new duties of metadata curation for the IR, analyzing usage statistics from our database vendors, or maintaining a local metrics system. We need to be able to step in when new duties appear and make them a part of technical services librarians' portfolios. We have a duty to our present and future colleagues to be a voice at the table for

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the national and international groups that develop and define the tools and vocabularies we use. Description and access, subject headings, authority work, and the future development of MARC and BibFrame need law librarians to articulate the distinctiveness of legal materials and ensure systems will be constructed that take those differences into account.

How do we do all this? Our TS-SIS is a great place to start. At the annual meetings, attend the committee meetings and roundtables. Go to the dine-arounds, have lunch or dinner with colleagues, and attend the new Discussion Dens. Even if you don't talk shop (who would that be?), you will make connections that you will need someday. Finally, help finance our ALA liaisons to be sure we do have that vital seat at the table. As I said at our TS Business Meeting, while I'm a bit embarrassed about having my name as a \$1,000 donor listed on that great big board outside the Exhibit area, I want to challenge every TS member to help meet that amount this coming year. Let's all make it a goal to donate something, whatever you can afford, to support our liaisons. They work hard for us, and we need them. Together, let's try to give them the support they deserve.

*Pat Sayre-McCoy  
University of Chicago*

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## **TS-SIS Marla Schwartz Educational Grant Recipient Report**

*Alicia Pearson  
Albany Law School*

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My sincere gratitude to the TS-SIS awards committee for selecting me to receive the Marla Schwartz Educational Grant. This award allowed me to attend the 2019 Conference of Newer Law Librarians (CONELL) and the American Association of Law Libraries (AALL) conference in Washington, DC. I benefited not only from the educational programming of these events, but also from meeting the larger community of technical services librarians. I am honored to find a place within this profession, particularly through an award established in Marla Schwartz's name.

As is the case with any national conference, the experience is what attendees make of it. It is impossible to take in everything, and there are competing possibilities throughout the schedule. CONELL, AALL, and the various special interest sections (SISs) do an admirable job introducing the daunting array of agendas and opportunities to newcomers such as myself. As soon as I stepped off the train, I had a Dutch treat dinner engagement co-hosted by Karen Selden and Jacqueline Magagnosc, two perfect women for breaking down the AALL landscape and giving first-time attendees a leg up. I also attended an Alphabet Soup dinner the following night, hosted by Alan Keely. This handful of familiar faces in my own area of interest made the rest of the conference more relatable, primed enlightening conversations, and established connections that hopefully will grow throughout my career. Thank you to CONELL and to the special interest sections for continuing to organize these dinners. They are invaluable.

CONELL's schedule astutely balances speakers, Q and A sessions, and smaller group activities. Introducing newer librarians to a panel of AALL executive board members reinforces the invitation to figure out a niche and get involved. The speakers reminded us that they were all in our shoes once and that they found ways to contribute to and benefit from the larger organization. Smaller group sessions included speed networking and the Marketplace for special interest sections. I admit to some trepidation when I saw "speed networking" on the schedule. No one was more surprised than me to find it enjoyable and even fun. The Marketplace inundated me with information (and swag!), and I found several leads for the rest of the conference. Closing with an entertaining bus tour of Washington, D.C. monuments, CONELL was the right introduction to the next few days.

Shon Hopwood was the ideal choice for keynote speaker at the Opening General Session. His talk, "A Law Library Saved My Life," outlined his transformation from convicted felon sentenced to federal prison to professor of law at Georgetown. His life changed because he had access to a law library while serving his sentence. He began writing briefs for fellow prisoners and had two petitions for certiorari granted by the Supreme Court. He now advocates for criminal justice reform. All of this, he emphasized, was because of a law library. "What you do matters," he told us. I cannot think of a better message for librarians to take into a conference.

As I started making my way around, I was fortunate to have the director of our library, David Walker, in attendance. He took me through the Exhibit Hall during the Opening Reception and introduced me to several vendors (more swag!) and other colleagues he has known over the years. Part of the value of the conference was glimpsing the profession through his perspective. I attended several sessions with this in mind, including Technology Contracts, the U.S. News and World Report Hot Topic, and Maximizing Your Faculty's Scholarly Impact. While currently outside my immediate responsibilities, these topics provided perspective to see the broader trajectory of our institution's efforts.

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More specific to my own work were two Deep Dives: *DIY API* and *Clean it up! Transforming Messy Data with OpenRefine*. These were both technologically beyond me, and OpenRefine suffered somewhat from venue technological issues. Nonetheless, the speakers were approachable and hands-on, particularly in OpenRefine, and both gave me ideas of areas to pursue and consider as I keep growing in my current position.

Sessions that offered more immediate tips to take back to my office included the Cool Tools session and a Discussion Den on succession planning. Every organization faces challenges with knowledge management, either in the form of immediate communication or with staff turnover. Solutions could be as simple as exploring a new feature in Microsoft Outlook or as complex as longer-term strategic planning. The smaller group discussion around succession planning confirmed my experiences when confronting lost institutional memory created by staff turnover. Those gaps can take years to identify and address. The new connections I made will assist me in coping with those challenges and in implementing strategies for mitigating them in the future.

Finally, I attended the business meetings for both the Online Bibliographic Services Special Interest Section (OBS-SIS) and the Technical Services Special Interest Section (TS-SIS). Besides appreciating the administrative logistics required to keep technical services concerns before the larger conference, I admired the comradery of these sections. Clearly, members serve because they believe in what they do, and they want to see their work sustained into the future. While I am just starting out, I see the importance of professional organization involvement, and I left with the resolve to look closer at local chapters to see where I can contribute.

This first AALL experience was a successful blend of information gathering and networking. I left feeling energized and ready for the next step. That would not have been the case without the thoughtful planning and diligence of many people who took care of everything from finding suitable dining locations to shepherding me safely back to my hotel after karaoke night. I met some who have been librarians for decades and others like me who are just starting out. I am very grateful to each of you. Thank you.

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## TS-SIS New Member Grant Recipient Report

*Rachel Parks  
Barry University*

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As a newer law librarian and a first-time attendee to AALL, the 2019 American Association of Law Libraries Annual Meeting in Washington, DC was an experience I found beneficial to my professional career and personal growth. A major “Thank You” to the Technical Services Special Interest Section (TS-SIS) for choosing me as a recipient of one of the “New Member” grants, awarded to a librarian in financial need. This grant made it possible for me to partake in the annual meeting, and I would also like to thank my supportive colleagues at Barry University School of Law, who not only wrote my incredible recommendation letters but also encouraged me to apply and participate in the 2019 meeting based on their past experiences.

The colleagues that attended the conference with me are so embedded in the AALL community that I was able to network beyond the CONELL group, before the dine-arounds and other networking activities. As soon as I arrived at the check-in for the conference and picked up my badge and bag, I was introduced to librarians who have been involved in law librarianship longer than I’ve been alive and have a sharp sense of humor to boot.

The evening before CONELL was spent exploring and doing a bit of sight-seeing before the conference began, and I must say that I was not disappointed by my first evening in DC before the conference kicked off. The day of CONELL started with a delicious breakfast and an opportunity to sit with fellow new law librarians and chat before the meeting began. When the meeting officially began, we were introduced to a panel of librarians and heard substantial advice and encouragement. It was a total Q&A session, which started with the moderator and led to the group of us asking questions when the moderator was finished.

The panel gave encouraging responses to all questions asked—given they were all once new law librarians as well, they had plenty to offer in the form of advice and knowledge throughout their careers. One piece of advice I will keep with me is the idea of imposter syndrome and not allowing it to consume you. Push that thought aside and have enough belief in yourself that you are capable and more than able to do just as much, if not more, than others who actively participate in the profession. Seek involvement in the committees and sections of AALL—and write! Do not be afraid to write and step out of your comfort zone. Another topic that was heavily addressed was being a leader when you are not a boss. A major hurdle we tend to face, especially as new law librarians, is the idea that we cannot speak up and address issues because we think we are too new to have an opinion. The panel emphasized the importance of speaking up, speaking out, and recognizing

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the value in our opinions and insights. Sometimes, fresh eyes on any issue or topic are better at catching the flaws in the current practices than the eyes that have handled the issues all along.

I also appreciated the panel mentioning that you do not have to have a JD to be a librarian at a law firm. This is encouraging for any librarian in pursuit of a career change or a librarian job in general since they are becoming few and far between.

It was wonderful to meet the faces behind the email updates from the SIS groups during the marketing session. Going around to each of the tables and learning more about the SIS organizations made me realize that there is more to the sections than the occasional job posting or newsletter updates. The speed networking event was a lot of fun. Even though we were allotted two minutes per person, it was entertaining to try and learn as much about another person in two minutes as possible. There are so many wonderful people in this profession, and the new law librarians have vibrant energy to contribute.

The end of the day concluded with a tour of the city. I have personally been to DC once before, but that was over fifteen years ago. To see the city again and pass iconic buildings was such a thrill. The tour guide was also entertaining and knowledgeable of the city and its history, throwing in some fun trivia. We all had a chance to take pictures of the Lincoln Memorial and from a distance see the Washington Monument.

The remainder of AALL was filled with attending informative sessions, the ones I thought I would benefit from and that I could fit in my busy daily schedule. It was difficult, however, to pick which sessions to attend (because there were so many interesting sessions), but I found out that we have the opportunity to watch any sessions we did not get to attend through recordings after the annual meeting. There was time for meeting with vendors and finally meeting the faces of my contacts of the last three years—most of whom I have only communicated with through email and phone calls. This gave me the opportunity to make personal connections with people I am in constant contact with.

My favorite part of the AALL annual meeting, and the ultimate highlight of my trip, was attending the dinner hosted by Thomson Reuters at the Library of Congress Jefferson Building. The librarian dork in me came all the way out when we drove up to the building and then entered the main hall. I enjoyed every minute of soaking in the architecture, history, and displays set up throughout the building. It was also a pleasure to hear the Librarian of Congress speak while we enjoyed delicious food and the company of other enthusiastic law librarians.

Overall, I had a wonderful first experience at AALL annual meeting and look forward to attending next year's meeting in New Orleans, LA. I would like to offer another special thank you to the awards committee for making it possible for me to attend the 2019 annual meeting and allowing me the opportunity to meet others in the profession and learn new things about AALL as an organization. I appreciate the support of all my colleagues and cannot wait to attend again as well as contribute more to the profession in the years to come.

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## **TS-SIS New Member Grant Recipient Report**

*Sidney Lanier  
Syracuse University*

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I have worked in a law library as a cataloger for a few years now, but this was my first year attending AALL. Thanks to the New Member Grant from TS-SIS, I was able to get my expenses covered and have a productive and fun time at the conference.

Firstly, I had the pleasure of attending CONELL. This is a must for any new law librarian. The culture was open, friendly, and it promoted networking while addressing very relatable problems that new librarians face. In part, CONELL felt like a support group because we all had so much in common as incoming law librarians, but it provided an excellent environment for forging lasting professional friendships.

The rest of the conference was wildly beneficial. My primary complaint was that there was almost too much good programming. I felt forced to choose between equally great sessions. As a technical services librarian, I tried to attend as many TS-SIS meetings as possible. It was hard to determine what I was supposed to attend. Did I have any reason to be at “business meetings” or “committee meetings?” Should I just attend “presentations” or “forums?” Do I need expertise to participate in “round tables?” The answer, particularly for first-timers, is to try them all. By asking seasoned AALL members about the various committees, I was able to get helpful recommendations for sessions that were most applicable to my work.

I decided to attend some committee meetings, and by doing so, I learned that I stand to gain valuable information, not only from the obvious TS-SIS committees, but also from the OBS-SIS committees. At a round table, I benefitted from the expertise of people who have already gone through ILS transitions that I will soon be facing at my own institution. Every

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presentation that I saw was genuinely interesting and provided insight into the greater community of legal librarianship.

AALL offers a wide variety of great programming, and there is quite literally something for every librarian. While I am lucky to work with a fabulous team of people at my institution, I felt like AALL gave me a safety net of professionals and resources that I can reach out to when I reach those hard to navigate project start points or technical dilemmas that can be so daunting. I intend to go back again next year.

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## TS-SIS Experienced Member Grant Recipient Report

Joy Humphrey  
Pepperdine University

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When I attended the 2018 American Association of Law Libraries (AALL) Annual Meeting last year, I hadn't been to one in 10 years. During that time, like many others, our library experienced budget cuts and staff reorganizations that drastically changed our work environment. With reduced staff, stalled collections, and plans both big and small put on the shelf to collect dust, it was a small miracle that our library dean could scare up the funds to send one of us to AALL. So being the staff member who'd gone the longest between conferences, I limped into the 2018 Annual Meeting depleted and discouraged. But I bounced out of it with energy, motivation, and a feeling I hadn't quite realized had been missing for some time: hope. I was riding high on new ideas and the realization that I wasn't struggling alone. I rode that high for about 9 months. Then I could feel my resolve and commitment seeping away ever so slowly. I knew that not only could I not wait years before attending my next Annual Meeting, I needed to attend *every* year. And then I discovered and applied for the Experienced Member General Grant. Receiving it was just the boost I needed to get reengaged and reconnected again.

There seemed to be a theme to the 2019 Annual Meeting for me. If I had to capture it in one word, it would be "reinvention." At a certain point in any career, it's easy to get stuck doing the same things in the same ways, viewing yourself and your skill set as fixed rather than flowing. This Annual Meeting had me thinking about myself and my job differently. For instance, it never occurred to me that I could be a presenter at a conference. I think of the presenters as "famous." Like rock stars. And I'm not a rock star (except sometimes in my car). But listening to the speakers at "Do More With Less: Workplace Efficiency Tools," I not only got a storehouse of great tips to organize my workflows, but I also was inspired to consider for the first time that maybe I could present a program in the future. After all, these speakers were facing challenges similar to my own, and yet they managed to put together a helpful, succinct, and well-executed program. Might I do the same? It was an exciting thought to ponder.

I had a similar experience attending the "Just Write It: Embracing Your Inner Author" program. Overly busy librarians were finding the time to write articles and books, create presentations, and pursue research, and they didn't do this from ivory towers with scads of uninterrupted time. Their shared experiences, suggestions, and encouragement got me thinking that maybe I do have something to say, and I don't have to be a renowned expert in order to contribute to the field.

Another way I thought I might reinvent myself was by getting more involved in the profession. I became a part of the Membership Committee last year and was happy to be able to take a shift at our Technical Services Special Interest Section (TS-SIS) station in the Exhibit Hall this year. But I haven't gone big with anything, mostly because I don't think I have enough experience (said the Experienced Member). But attending "Developing and Achieving Your Leadership Potential" was an eye-opener. The presenters talked about ways to develop leadership skills by getting involved in professional organizations. My take away? Throw yourself in the ring. Sign up. Volunteer. If you don't know what you're doing, you'll learn as you go, because everyone has to start somewhere. And for me, connecting with librarians outside of my own workplace is a key component in staving off isolation and stagnation.

I thought more along these same lines after attending the TS-SIS Business Meeting for the first time. I didn't realize that this TS community was actually a tight knit group. I'd read the discussion lists, I'd seen the names, but somehow everyone seemed fictional. Then suddenly there everyone was, and I felt like shouting, "That's Yael Mandelstam! That's Jacqueline Magagnosc! OMG, they're real people!" It was like star sightings. My main thought was, what have I been doing all these years merely lurking around the edges? We are a *real* community. We might be located miles apart, but we are all together in this little pocket of our profession, and look what some of us are doing! I found it inspiring to say the least.

Back at work now, ideas for reinvention continue to percolate, and the connection and motivation I found in Baltimore continue to fuel me. A heartfelt thanks to the Awards Committee for making it possible for me to attend the Annual Meeting this year. I have no doubt the results of their generous award will see me through the ups and downs of the months ahead and possibly lead to some reinventing along the way.

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## **Workshop Report**

### **Regex Rules! Using Regular Expressions with MarcEdit**

*Celia Gavett  
Columbia Law School*

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Presenters: Yael Mandelstam, Associate Librarian for Technical Services, Fordham Law Library  
Jean M. Pajerek, Director for Information Management, Cornell Law Library  
Alan Keely, Associate Director for Collection Services, Wake Forest University Professional Center Library

This half-day American Association of Law Libraries (AALL) preconference workshop began with an overview of the power that regular expressions (regex) offer to librarians who need to manipulate data: when exact-match searching is not enough to efficiently capture what we are looking for, regex can be used to search for concise *patterns* in the data. For example, instead of churning through many find-and-replace operations to capture text strings that contain variations on similar words (e.g., “corporation,” “corporate,” “incorporated”, etc.), a single regex can be written to retrieve all variations at once.

The presenters provided a beautifully written instructional manual, complete with references to additional tools and tutorials. Working in the free online testing tool RegExr (<https://regexr.com/>), the presenters led the class through a series of hands-on practice exercises, progressing seamlessly from elementary to more advanced problems. By the halfway point of the workshop, attendees had new knowledge of regex concepts and operations such as:

- Anchors & escapes
- Character classes
- Quantifiers & alternations
- Grouping & substitution

In the second half of the workshop, the presenters guided the class through five practice scenarios using MarcEdit software and regex to transform data based on real-world library database cleanup tasks, such as modifying the order of subfields, selectively deleting 6XX fields with undesired vocabularies, and adding missing punctuation. After the workshop, the presenters supplied an answer key so attendees could review the exercises at home, if desired.

On a personal note, I was able to immediately apply what I learned when I returned to the office, even though I had had only a foggy idea of what regex was before the workshop. Columbia Law Library recently migrated to a new integrated library system (ILS), and we had been looking at a new way to approximate the “title begins with” search we had been accustomed to in our previous ILS. After just a few minutes of consulting my workshop notes and our ILS’s syntax for searching within MARC field 245 subfield \$a, I was able to come up with at least one solution that worked and accounted for nonfiling characters as well: `/^.{0,4}titlehere+/`

I would encourage any readers of this newsletter to dip a toe into regex tutorials if they are interested in increasing efficiency in finding, transforming, or manipulating any data in their catalogs. The terms and characters are not nearly as difficult to understand as they may initially appear! Furthermore, there are often many ways to build a successful regex for any given situation; it is a flexible tool that allows the searcher to do some quick-and-dirty test searches before adjusting the syntax to a more concise form.

In my view, this workshop was one of the most valuable programs of the entire AALL conference, and technical services law librarians would be well advised to seize any future opportunities to attend programs led by these skillful instructors.

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### **AALL Opening General Session Keynote Address— Shon Hopwood**

*Sue Burkhart  
11th Circuit U.S. Court of Appeals*

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Shon Hopwood received a J.D. from the University of Washington School of Law as a Gates Public Service Law Scholar. He clerked for Judge Janice Rogers Brown at the USCA for the DC Circuit. Hopwood is an Associate Professor of Law at Georgetown University Law Center. He co-wrote a memoir entitled *Law Man*. This was all accomplished after serving a 12-year sentence for bank robberies. While he was incarcerated, he prepared briefs for other prisoners and even prepared two petitions for certiorari, which were later granted review by the U.S. Supreme Court.

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In his keynote address to AALL, Mr. Hopwood mentioned many times that he was grateful for his libraries and librarians. He feels that the library gave him some freedom which came from reading various kinds of books; enabled him to help others after he read legal books; and gave him confidence to both survive prison and help others while there. During his first six months in prison, the library saved his sanity after he checked out books, mainly novels. Then he started checking out Federal Reporter advance sheets and would read case after case. These were very confusing to him in the beginning, to say the least. Other prisoners told him their stories, and he began writing memos, briefs, and habeas petitions based on the cases that he had read. Hopwood got legal relief and shortened sentences for others, but never for himself. He became very popular in prison.

Mr. Hopwood feels that he became a successful lawyer when he got out of prison in spite of the prison system. He feels that prisons make you feel that you are worthless and that you will be back soon after you are released. The United States incarcerates more people than other countries, and people get longer sentences. It affects not only the person, but the entire family. Hopwood feels that prisons should be educating people with skills for a job because now when an inmate gets out of jail, his punishment continues in that the person cannot find a job, can't get an apartment, cannot vote, and the list goes on and on. Mr. Hopwood is doing all he can to help prisoners pro bono and to change the prison system so it will be a positive experience rather than a negative one. He feels that books can be a friend, reduce recidivism, can educate the prisoners, and change their lives. Mr. Hopwood encouraged everyone to donate to non-profit organizations that are sending books to prisons or to volunteer time at prisons helping people learn to read.

It was a very interesting and informative keynote speech.

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## ***Program Report***

### **Technology Contracts: Tips for Uncovering and Negotiating the “Devil in the Details”**

*Elizabeth Outler  
Southern University Law Center*

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Moderator: Cheryl L. Niemeier, Director of Knowledge & Research Services, Taft Stettinius & Hollister LLP  
Speakers: Diana Koppang, Director of Research & Competitive Intelligence, Neal, Gerber & Eisenberg LLP  
Michael McSunas, General Counsel, PrizeLogic  
Carol Ottolenghi, Director of Library Services, Ohio Attorney General

This program delivered well on the promise in its description that “the panelists will explain how to navigate the tricky landscape of contract negotiations with timely tips and best practices.” As advertised, the format was a moderator and panel, and Cheryl Niemeier kept things moving snappily along with questions about how they approach contract negotiations and high-level bullet points summarizing takeaways.

The first question for the panelists was “who is the contract ‘lead’?” Someone has to take the lead in a contract negotiation, so the panelists were asked to speak on who typically does this for library services contracts in their organizations. Diana Koppang stated that for anything library or research-related, she would be the lead person, and she is very fortunate to have a Chief Knowledge Officer (CKO) to whom she reports who strongly supports this approach. Often when dealing with software products or services, she works very closely with the IT Director, but it is understood that Diana leads all the negotiations with the vendors. Michael McSunas stated that in his environment, it depends on the contract; when business needs and priorities are driving the particular contract, then he might not be the point person on the negotiation. If the business really wants the deal done, then they may direct him to do whatever is necessary to get the contract signed so they can have the product or service they want. If not, then he and his legal department would lead negotiations focusing on appropriate legal terms and conditions. He said there are also times when the focus is on procurement and the most important term is price; in those situations, the person who is leading the negotiation wants him to spot legal issues and point them out, but they are most concerned with the numbers. Carol Ottolenghi answered that it would depend on the vendor; if it is a company that also contracts with her department for library-related products, such as LexisNexis or Thomson Reuters, then she would often be the lead because she is able to seek benefits based on the pre-existing relationship. If it is not specifically library-related but has knowledge management aspects, then she is usually at the table with the Chief Data Officer taking the lead.

The next question concerned who takes the lead on the negotiations, and Carol began by stating that she frequently takes the lead with negotiating “because I’m the crankiest.” While this statement was meant to create some levity in the presentation, Carol explained that she meant that she is always willing to say no and willing to walk away when terms are unacceptable. Michael answered that in his company, there is usually a partnership between either the business representative or the procurement officer and someone from the legal department, and often they perform “good cop/bad cop” roles, where one

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person presses on specific terms while the other tries to keep the deal moving. Diana said that she usually leads negotiations, and like Carol, she was happy to have a reputation in her firm for being a stickler for certain things, specifically price. She said she is also able and willing to bring in the CKO when necessary because that person backs her up when the vendor thinks they can get their way by schmoozing the “higher-ups.” The CKO makes it clear that Diana is the one who makes the decisions, and that usually puts an end to that kind of problem. All three agreed that it is important to build that kind of relationship with the rest of the firm so they understand that the librarian knows the market for the product or service, and this includes what the price and the contract terms should be. Carol also stated that often the attorneys in her department were very happy to say to vendors, “That is Carol’s area,” once they understood that she welcomed them to say so and that she was on top of things.

Because Carol’s department is a government agency, she was the focus of the next question, which concerned the length of time required for contracting. All of her contracts have to go through a formal “request for proposal” (RFP) process that involves demonstrating the reasons for choosing a product if it is not the least expensive option. This involves months of collecting proposals and testing before starting the contract negotiations; she starts RFPs in November for contracts that will have to go into effect July 1 the following year. Diana pointed out that in planning for the time frame for review and negotiation of contracts, it is important to consider the schedule and workload of the other people involved.

Cheryl asked the panelists to discuss any “must-have” clauses and any other issues they consider crucial to address. Michael said that the first thing he looks at are the termination and indemnity provisions. How, when, and why can each party terminate the agreement? Is it for a defined term and parties can only terminate for cause? Or can you terminate for convenience with a certain amount of notice? What is adequate notice? Does the contract default to automatic renewal, and if it does, how do you get out of that? Regarding indemnification, be really clear about what your organization is responsible for if there is a third-party claim related to your use of the product, and be sure that the vendor will take responsibility for anything that is their mistake. Carol said that the first thing she looks for is jurisdiction because she is required to have the laws of Ohio govern any of her contracts and for any disputes to be litigated in Ohio courts. Additionally, she is required to include certain data privacy language in her contracts (this model language is included in the handouts on AALL2go). She suggests looking for terms that describe what will be done with any tracking data, research histories, and anything that users upload; if this is not spelled out in the agreement, you should ask for it to be addressed. Michael works for a different kind of organization, so he pointed out that he takes a very different approach to jurisdiction and choice of law but emphasized its importance. For his company, they do not want an exclusive jurisdiction, and choice of law can be just about anything in the United States except for California. He finds that this can be a bargaining chip in certain instances; because he can be so flexible on these provisions, it is something to offer in exchange for other terms that he may require.

The next topic was bundling and whether the panelists use that or other techniques to get discounts (e.g., cross-department coordination). Diana discussed doing this kind of coordination with the IT and marketing departments in her firm, and sometimes this enables leverage in price negotiations. She emphasized, however, that it is important in these situations to be aware of the dependence of modules on each other or whether all services are subject to the same vulnerabilities. Is everything on the same server or cloud provider? In the event of a natural disaster or cyberattack, will all services be affected? Carol’s situation, which requires the RFP process, allows a certain approach to bundling that enables her to tell vendors that they do not always have to be the lowest bidder on every contract if she can demonstrate that the same vendor provides a significant pricing discount on another product.

Cheryl then moved the discussion into focusing on red flag words or phrases that should be at least noticed in every contract to be certain that they are not a disadvantage. The handouts on AALL2go for this program include a list of these watchwords suggested by the panelists, but some of the words mentioned in the program include Unlimited, Termination, Headcount, Privacy, Distribution, Automatic, Evergreen, Jurisdiction, Mandatory mediation, User behavior, Use of customer information, Liability, May vs. Shall, Third-party source/contractor, Data breach, and Indemnity. Cheryl suggested that if you are new to an organization or new to a responsibility for an organization’s contracts, it is a very important exercise to make sure you can read all of the current contracts and look for these terms, beginning with auto-renewal. It is not unusual to find that services are being renewed without anyone paying attention. Carol emphasized that a major red flag for her is excluded content. If there are certain collections or items that are available in the service but not included in her contract, those have to be disabled or extremely well marked.

A term that is very well defined in many IT contracts but not so often in library or research-related software contracts is the service level agreement (SLA). This clause governs how much downtime is permissible without causing a breach. Michael works in a role where he is very accustomed to defining service levels, and he encouraged the audience to be realistic about what is acceptable. The higher the service level required, the higher the cost will be, and you may discover that you can accept a lower percentage than you may initially think. A 99% level of service uptime is pretty good and truly acceptable for most customers because you probably will not notice the difference between 99.5% and 99.9%, but you would pay for

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it. Also define when maintenance and upgrades will be scheduled and how quickly they respond to problems. Make sure that a breach of contract provision is there and determine what your available choices for a remedy are. If the vendor goes out of business or fails to meet the SLA or changes other terms, what remedy do you want? You may not want to void the contract; you may want some other remedy, but it should be defined in the contract. An article from CIO.com referenced in the program slides, “What is an SLA? Best Practices for Service-Level Agreements,” may be helpful to those who are unfamiliar with including these provisions in contracts. See <https://www.cio.com/article/2438284/outsourcing-sla-definitions-and-solutions.html>.

The panelists discussed referenced documents, attachments, referenced terms, exhibits, addendums, and the like. Carol insists that every referenced document or term must be attached to the final version of the contract. Michael reiterated this and stressed that it is very important to examine all of these because it is not unusual for them to contain contradictory or superseding terms.

The panelists moved on to discuss data privacy laws. Michael said it is important to understand what the vendor is going to do with user data. There may be seemingly innocuous provisions in the contract, but then users are able to click on things that essentially license the use of their data in different ways than agreed by the organization. If you cannot make vendors be explicit about these uses, then there are problems. You should be aware of the requirements of the General Data Protection Regulation (GDPR), a set of protections from the European Union that went into effect in 2018, and the California Consumer Privacy Act (CCPA), another collection of user data privacy requirements that will go into effect in 2020. Links to these laws are provided in the supplemental materials on AALL2go. One advantage of these rules is that companies now have to disclose exactly what they are going to do with your user data.

All of the panelists discussed their approach to getting the terms you want and walking away when necessary. Diana said knowing what the walk-away points are ahead of time, and what the firm really wants and needs out of the deal, are essential preparation for being able to get the terms you want. Michael agreed and said indemnity provisions and data use agreements are extremely important for his company. He also says to watch out for whether the vendor is doing all of the work or potentially subcontracting to a third party because you would not have any rights to enforce the contract against the third party. Carol’s walk-away points typically are state law requirements but can also be money related because her budget is very specifically bound. She has to know which resources are absolute must-haves that she cannot walk away from, and there are very few of those, but others she will terminate or reduce considerably as price goes too high.

Cheryl asked how the panelists’ organizations deal with being asked to sign non-disclosure agreements (NDAs). Diana says that at this time, the law firms just sign them, largely because they do not think they can avoid it. Michael is generally against them because he does not think they are necessary or reasonable for most of the information the vendor is trying to restrict. If nondisclosure provisions are in the contract, he says to make sure that there are no damages attached; the only remedy for violating an NDA should be an injunction. Carol pointed out that they are not necessary for the terms of the contract themselves because all of her contracts are required by state law to be public. Therefore, she does not allow NDAs in her contracts.

A last question was how the panelists organize and manage their contracts that are currently in effect. Diana emphasized that it is very important to follow up and make sure that you receive a copy of the counter-signed agreement. It is very typical not to receive that until you press and ask for it. It is also important to put on your calendar or a department calendar the dates that matter for that contract. Cheryl says she used a simple spreadsheet to manage her contracts. An audience member asked a question about managing contracts within an organization that is distributed geographically, and branches have sometimes executed contracts without central offices knowing. The panelists uniformly responded that this problem is the reason for having one designated firm representative whose role is to make these deals, and that all branches must be made aware of that policy; alternatively, if that culture cannot be changed, then a central contracts management system must be in place so that all branches can view all contracts.

During the audience questions, the panelists were asked about using consultants. Diana said the important thing in using consultants is the person who is representing you—it is not the company, but that person who is important. Vendors do not want to deal with a consultant, but Diana believes that is because they know it is most advantageous to the customer, and her firm’s position is that for the very expensive contracts where appropriate market pricing is a black box (because of the previously mentioned NDAs), the use of consultants is necessary.

In conclusion, the program provided a lot in a small package. While the panel’s discussion was largely anecdotal, the varied perspectives and the broad knowledge of the presenters enabled the overall picture to be very thorough. The program is also good for beginners and intermediate level learners on this topic. The supporting materials provided on AALL2go should prove very useful as well.

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## ***Program Report***

### **Deep Dive: DIY API: From Inception to (Successful) Implementation**

*Kaylan Ellis*  
*Ohio Northern University Taggart Law Library*

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Coordinator: Jessica Pasquale, University of Michigan

Presenters: David Armond, Brigham Young University

Benjamin Carlson, Villanova University Charles Widger School of Law

Laura Chance, Morgan Lewis & Bockius LLP

Jonathan Germann, Gavelytics

#### **Why API?—Laura Chance (Morgan Lewis & Bockius LLP)**

Laura Chance began the session by exploring the many possibilities for employing application programming interfaces (APIs) in a variety of settings. APIs pull together data and present them to users as directed, enabling different applications to “talk” to each other. For instance, a law firm could create an API to track news related to its clients, tying into their social media feeds and pulling basic biographical data. Another API could pull in data from a data warehouse or HR database. Yet another API could pull data from a reference interaction database for analytics.

Chance reminded attendees that our users/patrons/clients are just people—people who may be stressed, cranky, or impatient, but who are also motivated to perform quality work. Take time to ask what they’re trying to accomplish and what issues they’re encountering. When the need for an API has been identified, ask opinions, gather feedback, and remember to advocate for yourself especially during the design and build-out process to make sure you’re addressing what people really need. Chance recommended process mapping workflows right from the start, asking questions and determining what your vendor or IT department can do to make the work easier.

Many legal research vendors incorporate APIs into their platforms. For instance, Fastcase allows customers to access its data via API. Thomson Reuters’ Litigation Analytics and Practical Law are particularly notable examples of the company’s use of the technology. Lex Machina leverages APIs within the platform for analytics. Harvard’s Caselaw Access Project includes digitized cases from 1685 to 2018, all of which are available by API. OpenDataPhilly is yet another example of a trove of data, including data related to traffic violations and voter turnout in Philadelphia, which can be pulled for use in your own tools and analysis through an API.

Ultimately, Chance encouraged developers to understand their role within a community or organization. Identify your struggles and issues, then develop new solutions using existing tools and resources. She expounded upon a quote from Fastcase CEO Ed Walters, who advised, “build something small and shiny.” Chance suggested that attendees identify a simple problem within their organization or user base which is easy to solve, but which no one has tackled yet, and find a way to solve it. In her experience, this will impress people regardless of how simple the problem was, and they’ll remember your work and look to you for help in the future.

#### **Understanding API Requests, and Responses—Benjamin Carlson (Villanova University)**

Benjamin Carlson explained API requests and responses, starting with an interactive example using a URL ([https://api.case.law/v1/cases/?jurisdiction=ill&search=cubs&page\\_size=2](https://api.case.law/v1/cases/?jurisdiction=ill&search=cubs&page_size=2)) sent to Harvard’s Caselaw Access Project API (CAPAPI). Data from the Project were requested, converted to a text file for transmittal, and structured in a way that a computer will understand. Carlson reminded attendees that many are already familiar with the basic premise behind the API. He reviewed the structure of requests in “classic” iterations of the Lexis and Westlaw platforms in which users chose a specific dataset, constructed terms and connectors, and submitted the search to pull desired data from the database, mirroring the high-level functions of an API. Carlson emphasized the importance of understanding API requests and responses to provide a sense of what goes on behind the scenes, even for those who don’t plan to write code.

Generally, there are three elements of an API: an endpoint, a set of parameters, and a key. Within the CAPAPI URL “https://api.case.law/v1/cases” is the endpoint—the specific place to go. Next, “?jurisdiction=ill&search=cubs&page\_size=2” are the parameters—filters and options defining the search request. Typically, users will also need a unique API key, available from the provider, which tells the server who is making the request. An API’s documentation will define its endpoints and parameters and their functions, describe the format of response data, and convey any limitations on data usage and quality. Good documentation, such as that provided by CAPAPI, will include examples, descriptions of endpoints, and tutorials.

Carlson likened parsing API results to the way we read cases, identifying key elements such as citation, party names, and docket number by format and location within the document. Computers don’t currently have the level of intuition required

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to “read” cases like we do, so we must mark the data fields to enable the computer to recognize each one. The most common text encoding for API requests uses JSON, which results in a large text file that is a little messy for humans to read but easy for computers to parse due to its precise fields and hierarchical structure. The API documentation should dictate the type of data one can expect in each field, making it easy to identify and request the necessary data.

Using the Marvel Developer Portal, an extensive database which includes characters, stories, artwork, and other information related to Marvel Comics, Carlson led attendees through a series of exercises demonstrating the capabilities of APIs to extract data. The Marvel Comics API has excellent interactive documentation which allows users to obtain a unique key and construct APIs. Carlson used the API documentation to obtain images related to a specific character as well as an entire series. He recommended changing parameters and comparing different sets of results to hone request-building skills. Once users understand how data are structured and transmitted, the job of creating API requests and interpreting results can be assigned to a computer. With a little programming knowledge, users can create their own interactive tools to address a variety of information needs.

### **Use API to PUT/Load New Students—David Armond (Brigham Young University)**

The latter half of the session made use of several resources which attendees were encouraged to download and install prior to the start of the session. These included the latest versions of Python, Selenium, and BeautifulSoup, as well as a dataset from the Law School Admission Council’s (LSAC) ACES2 admissions system and a Python script designed to interact with the 12Twenty API.

David Armond kicked off the second hands-on portion of the program by demonstrating the use of an API to load new student profiles into 12Twenty, a tool for managing student job searching and experiential learning. Armond compared the outdated API from LSAC which produces a .csv file—essentially a report branded as an API—with that of 12Twenty, which expects the user to know how to use JSON and how to write some software to load the JSON file.

The .csv file of student profiles from the ACES2 API can be somewhat tricky to manipulate at first, which can be mitigated by a metadata crosswalk. Users will need to identify and include required fields and may also want to include “less documented” fields, which are unlisted in the API documentation but still considered necessary. Then, all that is needed is to write a script to process the .csv file into JSON, from which point the data can be imported into 12Twenty after authenticating the API and setting certain variables. Using cURL, a free command-line tool for transmitting and receiving files using URL syntax, the programming language can function as a browser and perform commands such as GET and POST. Authorization requires a lengthy string, but the process is simple. Users can enter the 12Twenty subdomain, enter the key string to authenticate the API, and then import the student profiles by uploading the .csv file. Armond points out that a macro could technically accomplish the same goals, but that once you have an API set up, you can run through it any time it is needed.

### **The Internet API—Jonathan Germann (Gavelytics)**

The final portion of this session was led by Jonathan Germann, who asserted that the Internet is essentially an API, and anything a user sees in their browser can be manipulated as such. He noted that many of the tools we use regularly are essentially APIs, such as operating systems like Windows and some components of the Microsoft Office Suites. Modern programming is largely a collection of APIs, with the Internet representing a fairly uncomplicated example from which to scrape, parse, and manipulate all kinds of data. Approaching the Internet from this fresh perspective presents an opportunity to perform innovative work, pulling data from disparate sources, determining the structure of the data, and breaking them down for manipulation and use. Germann provided a high-level overview of web crawling and recommended his own *Code4Lib* article which guides readers through an example of extracting information from the Internet using Python.

Best practices for manipulating the Internet API can be broken down into four stages. First, inspect the website and set the project scope, reading the terms of service or relevant robots.txt files to determine how data are formatted, planning the timing of calls, and setting other logistical boundaries. Make use of built-in developer tools within Firefox or Google Chrome to monitor traffic as you use the website, look for formatting and unique HTML tagging, and create a plan for manipulating and extracting the data. Second, retrieve the relevant data. Tools such as cURL, Python Urllib, and Selenium WebDriver can obtain the data for any website, depending on its size. Wait to parse through the data later so that if something goes wrong during the retrieval process, you won’t lose parsed work. Next, parse or isolate relevant data using tools such as Selenium or BeautifulSoup, which can create a navigable tree structure for the parsed website. Finally, do something with the information gathered, such as setting up automatic alerts at custom intervals, creating relational datasets for analysis, or archiving changing digital content.

Germann worked through several examples in Python, including creation of a short script to set up Trademark Trial and Appeal Board alerts for different docket numbers and parsing the data with BeautifulSoup. He noted that seemingly difficult

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projects such as this can be tackled using recycled code found online. Germann advised anyone planning to scrape data from a website to check the robot.txt file and to respect any boundaries it lays out, spreading hits over time or avoiding certain parts of the site entirely as requested so as not to overburden other servers.

## Q&A

Despite the breadth and depth of coverage in this Deep Dive session, audience members were still eager to learn more at the end. One attendee sought recommendations for resources for beginners to learn Python. Germann recommended a book-based approach, which would include many examples, as well as one of the free courses available through Lynda.com (now LinkedIn Learning). Other recommendations included two books, Al Sweigart's *Automate the Boring Stuff with Python*, which includes a chapter on web scraping, and Zed A. Shaw's *Learn Python the Hard Way*, as well as two web-based resources: the Python for Everybody certification series from Coursera and the beginner-level Python courses from Pluralsight.

Another attendee asked for advice on incorporating content from YouTube back into an existing website such as WordPress or SharePoint. Although some sites can harvest YouTube videos into an .mp4 file, the presenters note that this practice is not lawful. They suggested providing links and embedded code to stream YouTube content on a website as a more above-board approach.

Next, an attendee asked for recommendations for resources that focus on programming in libraries, beyond Code4Lib. The presenters suggested searching through librarians' GitHub projects, pointing out that many librarians are not publishing papers but rather "doing cool things," posting the results to GitHub, and then collaborating with one another. Finally, the presenters encouraged attendees to get in touch with folks who can help address technical challenges by attending hackathons, whose participants include people with solid technical skills who will likely be excited to help librarians tackle thorny technical issues.

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## Program Report

### Do More With Less: Workplace Efficiency Tools

Joy Humphrey  
Pepperdine University, Harnish Law Library

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Speakers: Mari Cheney, Boley Law Library, Lewis & Clark Law School  
Ellen Frentzen, Boston University School of Law  
Anna Lawless-Collins, Boston University School of Law  
Meg Kribble, Skadden, Arps, Slate, Meagher & Flom LLP

This was a very practical session focusing not necessarily on the latest and greatest task management technologies, but, as Mari Cheney put it, on "the [tools] that make our lives easier."

The speakers grouped the tools they use into four categories: task management, internal communications, chat, and grab bag, i.e. miscellaneous efficiency tools.

#### Task Management Tools:

Anna Lawless-Collins discussed the first task management tool, **KanbanFlow**, which uses customizable boards in which you can organize tasks using cards. Within the cards, you can create task lists, make notes, and attach documents. Anna sets up her board with columns dedicated to goals for the year, future projects, standing meetings, monthly tasks, and projects that are in progress. She finds this reduces the need for sticky notes and helps her keep track of everything while focusing on only a couple items at a time. She also uses it for shared projects since she can review departmental workflows, visually seeing how the work is distributed.

Ellen Frentzen uses KanbanFlow to track invoices that get paid on a regular basis. On her board, she includes information on payment methods, approximate costs, and expected invoice arrival dates, and she has the ability to receive reminder emails when a due date is imminent. She also uses KanbanFlow to track items through their processing steps, such as barcoding, itemization, printing call numbers, labeling, shifting, and re-shelving.

Overall advantages of KanbanFlow are that it's customizable, it has color coding capabilities, and boards can be archived. Anna and Ellen's library pays for the premium version of KanbanFlow, which gives them the added benefits of attaching documents, batch uploading tasks, emailing tasks, and making use of swimlanes, but there is a free version available as well.

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Mari Cheney uses **Trello** for her task management tool. It is very similar to KanbanFlow in that it uses cards to organize tasks, it's customizable, and it uses color coding. Trello is simple and easy to use, and it can be set up in a matter of seconds. Mari uses the free version for standing meetings and to track due dates, but there is a paid version which gives you access to Trello Teams and lets you integrate with Slack.

As a law firm librarian, Meg Kribble uses **Outlook Tasks** as a reminder tool. She uses it to block space on her calendar in order to tackle longer research requests or to remind herself to send emails. She also uses it to list all the webinars and reading she wants to get to, as well as her brainstorming ideas and questions she wants to ask people. But when it comes to tracking her time for billing, Meg finds a **steno pad and pencil** suit her purposes best.

### **Internal Communication Tools**

At Boston University, Anna and Ellen use **LibAnswers** to track internal and external communications. Each department uses LibAnswers slightly differently. Collection Services uses it to track statistics and claims, log e-access issues and resource requests, and order course reserves. They also use it to track how much staff time is spent on certain tasks. Access Services uses it to track requests they receive for items in their closed stacks. The administration side uses LibAnswers to track facilities issues and requests for supplies. It's also a good tool to use to keep track of requests that escalate and have a more complex path towards resolution. Tracking these sorts of requests lets everyone involved know what's going on and how similar requests can be handled in the future.

Another useful tool to handle requests is **Quest**. Meg's law firm uses it to track research requests. She likes it because it's collaborative and easy to get the big picture. The dashboard shows the numbers for requests that are pending, claimed, and finished. It shows who is available and who is unavailable to answer a question, as well as who is working on a request. Meg uses three tabs to monitor requests; one is for who the requestor is and in what format they like to receive their information, the second is for team members involved in the request, and the third tab is for time-keeping for purposes of client billing. She also uses Quest as a knowledge base wherein she can write up instructions on, for instance, how to use a particular database so that whenever this question comes up again, everyone has access to the information.

Mari noted that **Slack** has the same benefits as LibAnswers but is less expensive. This tool organizes conversations by channels instead of email folders. It integrates with Google Suite, Trello, and Slaask.

Microsoft's answer to Slack is **Teams**, which Anna uses as a one stop shop for chatting, emailing, and attending virtual meetings. Teams can keep conversations and resources organized by project. Because Teams integrates with SharePoint, you can access documents stored there and in OneDrive.

### **Chat**

Meg uses **Jabber**, which acts as an internal firm instant messenger. It is good for quick questions; however, it doesn't have the ability to retain chats once they are finished. Some of the benefits of Jabber are that it syncs with your desk phone so you don't have to look up phone numbers, it plays voice mails, and it syncs with Outlook and shows who's available.

Mari highly recommends **Slaask** as a chat tool. It opens in the same window as Slack. The key advantage is that it notifies you when a chat is incoming so that you don't have to remember to open another window. You can preset schedules and note days off. The chat box is easily implemented on your website, and no matter what website page your patron is on, they will see the chat button. After using this tool, Mari's library saw a substantial increase in their usage statistics.

### **Grab Bag Tools**

Mari talked about implementing the **Pomodoro Technique** to help her focus on tasks. The Pomodoro Technique consists of concentrating on a task for 25 minutes, then taking a short break before resuming another 25 minute session. After three or four of these sessions, you take a longer break. Mari uses a simple Pomodoro timer on her Chrome browser called Focus. It's a free extension with the advantage of also being able to block certain websites so that, for example, you can block Facebook if that is an area of distraction for you.

Another way to focus more on what's important and to minimize distractions is to **spend less time on email**. Although she hasn't been able to bring herself to do this, Mari suggested using only two email folders. She noted that research shows that it takes longer to move email into a folder and then later trying to remember which folder it is in than simply using your search functionality to find the emails you want. Other, perhaps more doable, suggestions are to check your emails on a set schedule rather than constantly checking them whenever they pop up. And when you do read an email, respond immediately. This is referred to as the **OHIO** (Only Handle It Once) method. Finally, she suggested the Unroll.me app

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which puts all ads, vendor notifications, or whatever else you can group together, into one email per day, so you end up checking only one email as opposed to multiple.

Mari had further suggestions for **how to be productive in meetings**. First on the list is to make meetings a smart phone-free zone which has good precedence since she noted the Obama White House made use of this rule. Another idea is to schedule meetings for only 15 to 20 minutes; short meetings lend themselves to to-do lists and are consequently more productive. And if there are longer breaks in between meetings, people can accomplish deep work before the next scheduled meeting. Another suggestion is to hold a meeting where everyone stands rather than sits; people get more excited about what they're talking about if they're standing. And finally, end every meeting with a to-do list and designate the person or persons who are directly responsible for those actions.

Meg's Grab Bag suggestion was to use **Outlook signatures** for email content that you send frequently. You write your email once, and then store it in an Outlook signature file for future use. Similar to this is **Gmail's canned responses**. You can save any email you write as a canned response. Making use of these shortcuts saves not only time, but mental energy.

The presentation ended with the following suggested reading:

*Digital Minimalism: Choosing a Focused Life in a Noisy World* by Cal Newport

*Extreme Productivity* by Robert C. Pozen

*How to Do More in Less Time* by Allison C. Shields and Daniel J. Siegel

*Scrum: The Art of Doing Twice the Work in Half the Time* by Jeff Sutherland and J. J. Sutherland

As Mari noted, it is not okay that we are all being asked to do more with less, but since that is the reality, these workplace efficiency tools are practical and easy ways we can make our own work lives easier and perhaps a bit less overwhelming.

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## ***Program Report***

### **Law Librarians and Online Security: Transforming Talk into Action**

Sharon Bradley  
University of Georgia School of Law

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Presenters: Deborah Ginsberg, Chicago-Kent College of Law Library  
Scott Baron, Incenter Technology

We all know that Deborah Ginsberg, Chicago-Kent College of Law Library, knows her technology. I recommend you watch her 2018 annual meeting presentation *Blockchain Is So 2017: Legal Cryptotech for the Modern Librarian*, <https://www.aallnet.org/recording/aall2018-legalcryptotech/>. For the 2019 annual meeting, she brought along an outside tech expert, Scott Baron, President of Incenter Technology. They started with some rather sobering statistics: 23% of law firms have experienced a cyberattack or data breach, and 29% of firms do not have formal security policies. Law firms are often a target for cyberattack because of their access to client information. Firms are actually seen as a weak point and a path to a richer target.

The presentation itself was packed full of tips and resources covering email threat mitigation, multi-factor authentication, web filtering, endpoint protection/anti-virus, personal firewalls, and personal VPN. I couldn't possibly talk about everything in the presentation, but I do want to tell you about the recommendations I have already implemented or that I'm working on. Unfortunately, the presentation was not recorded, but the handouts are available at <http://bit.ly/AALLSecurity2019>.

#### **Web Filtering**

A web filter is a program that screens incoming web pages to determine whether some or all of the pages should be displayed. The filter checks the origin or content of a web page against a set of rules provided by the company or person who installed the filter. A web filter can block pages from sites that are likely to include objectionable advertising, pornographic content, spyware, and viruses. Like most people, I have multiple devices with different operating systems, but I have enabled the various filtering options:

- Google Safebrowsing in Chrome—<https://safebrowsing.google.com/>
- Enable Security Warnings in Safari—<https://support.apple.com/guide/safari/security-ibrw1074/mac>
- Enable Windows Defender SmartScreen—URL was way too long and complex; just search for “enable Windows Defender SmartScreen”

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## Personal VPN

We have all seen the stories about the dangers of using the Wi-Fi at coffee shops, airports, and hotel lobbies, but we all do it because of the convenience. One way to protect our personal information while using public Wi-Fi is with a virtual private network (VPN). This article from *PC Magazine* explains why you need a VPN: <https://www.pcmag.com/article/352757/you-need-a-vpn-and-heres-why>. *PC Magazine* also has great product reviews. I'm going with their recommendation in "The Best iPhone VPNs for 2019."

## Password Management

Debbie and Scott particularly highlighted the importance of using best password practices. As the new school year gets underway, it may be a good time to remind everyone. The Cybersecurity and Infrastructure Security Agency (CISA), part of Homeland Security, has some useful guides: Choosing and Protecting Passwords, <https://www.us-cert.gov/ncas/tips/ST04-002>, and Supplementing Passwords, <https://www.us-cert.gov/ncas/tips/ST05-012>. The CISA also has a great set of tips for all computer users at <https://www.us-cert.gov/ncas/tips>.

One specific product recommendation the speakers made was to install Cylance Home Edition, available at <https://shop.cylance.com/us/>. Cylance provides virus protection based on AI. You should also consider getting the bundle with NordVPN, LastPass, and Cylance Home Edition at <https://promos.cylance.com/en-us/bundle>. I've had a LastPass account for a few years but recently added it to my work computer with the browser extension <https://www.lastpass.com/how-lastpass-works>. When my current anti-virus service for my home computer is up for renewal, I will consider Cylance.

Finally, a reminder about phishing scams from Cofense: <https://cofense.com/anti-phishing-best-practices/>.

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## Program Report

### **Making the Case for Structure—Bringing Order to the Magic : Structured Data as a Way of Advocating for Cataloging and Metadata : TS-SIS Hot Topic**

*Shawn King  
University of Wisconsin, Madison Law Library*

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The Technical Services Special Interest Section Hot Topic Forum, led by Jesse A. Lambertson, Georgetown Law Library, had us think about why structured data is necessary for information retrieval. Our library catalogs, LibGuides, webpages, and other assorted lists are built on indexes, tables, algorithms with various known and unknown weights, and many elements of display. The data works because it is built using rules, schema, and standards—cataloging and metadata at its finest.

We started our discussion with a critique of the limits of keyword searching. One of the limits is when you input a bunch of words into the search box the results can be overwhelming. Are the results a reflection of the meaning or aboutness the searcher wants? There needs to be more teaching on how to use search tools like nesting, wild cards, and phrase searching. How many non-catalogers understand this? Full-text content continues to make keyword search results ever more defused. Library of Congress indexed every field in their records when they last switched library systems to make more data discoverable in a keyword search while still allowing for specific title and author searching. But we need to think very carefully about what we index and if the results of keyword searching those fields are useful (example: New York as a publication place would return a lot of results). Search algorithms aren't available to us, so we aren't always aware of how relevancy rankings are configured. For Law resources, the 246 field is very important, as it is often the more commonly known title of a resource. Is it one of the top fields in relevancy ranking? Another example of the problem with keyword searching is healthcare versus health care. Are the results taking these differences into account? Authority control could help with some of these problems, but library systems don't always use authority control data effectively.

We then moved on to a discussion making explicit connections between user goals and metadata work. Discovery layers assume the users don't know what they are looking for—context must be taught before questions make sense. Library of Congress subject headings aren't on the cutting edge of new vocabulary; it needs to be more nimble. For example, when there is a new country name, it isn't updated right away in the authority file. Ways to get around this include using the 653 field or creating new Name Authority File headings for rebel jurisdictions. Another example is when the term "hate speech" became the hot new topic. How do we search for that as a subject when initially we aren't even sure what it means? Is it a form of sedition, defamation, group defamation? It takes time to sort out the meaning and use of new terminology. Remember the term "Afro-American," which was used for a few years mainly in Baltimore and Washington, D.C., due to the name of a local newspaper. It didn't last. "Information superhighway" is another term. And now we are dealing with a globalized database which can bring new challenges in terminology and meaning.

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This led us to a discussion of the structure of the data itself. Queries return results because the data itself is structured and based on rules and standards. Search algorithms may be something we should explore to have an understanding and influence on the process. Google Scholar, as a for-profit, won't share their search algorithms with libraries. They search against full-text data as opposed to the limited structured library data. AI and Big Data are powerful tools as well. Should we change our searching to mimic these? Or is Linked Data the answer instead, incorporating our data bits into the larger data pool and having those big search engines discover our resources? Computers process in linear/structural fashion, so we need to find new ways to expose our data.

The new generation of users thinks differently, and the way they find information is different from in the past. The use of Linked Data and experimenting with knowledge cards are attempts to help the user. Catalogers should partner with others who are using structured data and building taxonomies to help define how the big search box works, when autofill in searching is a good thing and a bad thing, and when exact index searching is a more efficient use of structured data searching.

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## ***Program Report***

### **OCLC Update**

*Christopher Thomas  
University of California, Irvine*

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In lieu of a presentation at the 2019 AALL Annual Meeting, Meryl Cinnamon from OCLC presented a webinar on June 17, 2019. 31 people attended. Survey responses were generally positive, and people seemed to like the webinar as a format for this type of update. Suggestions for future webinars included having a question & answer session and focusing more on the law library community.

Highlights of Meryl Cinnamon's presentation:

- Theresa Byrd of University of San Diego has recently been elected to the OCLC Board of Trustees.
- The Americas Regional Council Conference will be held in Phoenix, Arizona, on October 2-3, 2019. More information is available at <http://oc.lc/arc19>.
- OCLC recently conducted a survey on open access activities in libraries. Survey results are available at <http://oc.lc/open>.
- No sunset date for Connexion has been announced, but users are encouraged to look at Record Manager at <http://oc.lc/getRM>.
- OCLC has produced a summary paper explaining OCLC's work with Linked Data, available at <http://oc.lc/linkeddatabsummary>.
- Recent WorldCat Discovery enhancements include virtual shelf browse, a database recommendation feature, and addition of local holdings information for supplements and indexes.
- The sunset date for WorldCatLocal is August 9, 2019. All customers are making the transition to WorldCat Discovery.
- Question Point and Reference 24/7 are moving to Springshare.
- The WorldShare Management Services Global Community+ User Group Meeting will be held in Dublin, Ohio, from October 16-17, 2019. More information is available at <http://oc.lc/wmsglobal19>.
- The OCLC annual report is available at <http://oc.lc/annualreport>.

People who registered for the webinar may view the recorded webinar and slides at <https://oclcwebinar.webex.com/oclcwebinar/lr.php?RCID=32937943d40a47f8b57de25e551c75cc>.

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## ***Program Report***

### **Deep Dive: Clean It Up! Transforming Messy Data with OpenRefine**

*Chris Todd  
University of Pittsburgh*

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Jennifer Noga of Wake Forest University began the session by welcoming the audience and introducing both presenters. During the first portion of this session, Emily Dust Nimsakont, Content Operations Contractor with Singularity University, focused on the core features of OpenRefine. The second half of the presentation featured Thomas Ma, Cataloging Manager at Harvard Law School, detailing some of the advanced functions of this program.

Described as a "a powerful tool for working with messy data," OpenRefine is increasingly useful for catalogers and data managers, providing batch-editing features that many Integrated Library Systems lack. Nimsakont demonstrated how to

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import bibliographic information into OpenRefine by utilizing CSV/TSV formats (Comma Separated Value/Tab Separated Value). MARC records can be easily converted into OpenRefine-compatible formats using the Export Tab Delimited feature in MarcEdit. This information can be uploaded directly through an import widget or by copy-and-paste.

The primary appeal of OpenRefine is its ability to identify and standardize inconsistent data. Many common transformations, such as trimming whitespace and converting text to title case, are included as presets functions in the program. Nimsakont demonstrated how a native feature can create separate entries for books with multiple authors. Provided that each name is separated by a comma, the “split multi-valued cells” function in the column dropdown menu seamlessly accomplishes this task.

In addition to preset functions, users can add custom transformations using the General Refine Expression Language (GREL). Any commands used (native, custom, or a combination of both) can be exported as a JavaScript Object Notation (JSON) file and reused for future projects.

One of the most useful features of OpenRefine is its ability to edit text facets. This allows users to easily review how often variations of a term are used in the data. For example, the language of a work in English may be listed as EN or ENG. By reviewing and editing text facets, users can identify all variants of a term and standardize them throughout the document instantly. Nimsakont’s demonstration of this feature evoked an audible gasp of astonishment throughout the room. Users can review the OpenRefine recipes page for useful functions at <https://github.com/OpenRefine/OpenRefine/wiki/Recipes>.

Thomas Ma’s portion of the presentation focused on the advanced features of OpenRefine, particularly the use of reconciliation services to standardize data. Drawing on his experience working with Harvard’s Nuremberg Trials Linked Data project, Ma demonstrated both the Virtual International Authority File (VIAF) and Wikidata reconciliation services. In addition to identifying standardized forms of proper names, Ma demonstrated how to generate Wikidata ID numbers for each name using the `cell.recon.match.id` function. These numbers can be prepended with URL information through a simple GREL function to create active hyperlinks. Finally, he showed how to use these completed Wikidata URLs to extract and incorporate additional authority information (such as date of birth, employer, etc.). In closing, Ma noted one of the most useful features of OpenRefine is that the exportable JSON file can be easily shared with other librarians working on similar projects.

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## ***Program Report***

### **I Know It Used To Be There: Using Web Archives In Legal Research**

*Carol Morgan Collins  
University of Tennessee*

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Christopher Siwa, Director of Information Technology, American Association of Law Libraries, introduced the session and speakers.

Mark Graham, Director of the Wayback Machine at the Internet Archive. Mr. Graham has been a long-time Internet pioneer and proponent of digital access.

Abigail Grotke has over twenty years of experience and is the project manager and coordinator of digital library programs. Since 2002, she has led efforts in the area of web archiving at the Library of Congress (LC).

Clare Stanton oversees web-archiving projects at the Harvard Law School Library’s Library Innovation Lab. She is in charge of Communications and Outreach and Perma.cc.

Three speakers gave overviews describing digitization and/or preservation efforts in place to secure both born digital and print-to-digital resources. Each of the three organizations purposefully strives to archive and preserve digital information, but each one maintains a different strategy and focus.

#### **Mark Graham, Director, “The Wayback Machine and the Internet Archive: A Library for Everyone – Even Lawyers!”**

Mark Graham explained that the Wayback Machine is a non-profit part of the Internet Archive and dedicated to providing “universal access to all knowledge.” Materials archived include TV news channels, software, movies, books, audio, and the web. The organization replicates all information and stores data for safekeeping in various locations. The organization archives three billion websites each week, and the site holds 273 billion webpages, taking up 15 petabytes, or 40 million gigabytes, of storage. He added that APIs, browser extensions, and IOS and Android apps are available for free use.

Graham reviewed features now available on the Wayback Machine. This includes “Save Page Now” and “Try New Version” that archives the URL as well as all the out links associated with a page. Another new development is a feature that allows

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users to archive Google Sheets and up to 300 associated out links. A user can now compare the changes a website undergoes over time by using the Site Map tool that highlights revisions in blue and yellow to demonstrate the content differences.

Planned growth includes increasing book digitization from 1,000 to 2,000 a day. The organization is working with Wikipedia to link out to referenced books with approximately 70,000 books. One example of this work is the links made available for the Mueller Report. Upon examination, only fourteen links were included in the report. The Wayback team reviewed the footnotes and added links to 733 external resources that were not previously available.

Other services include assisting with the ability to detect changes in government websites and fighting link rot. He noted the study by Zittrain and Lessig that reported that approximately 50% of the URLs in U.S. Supreme Court opinions no longer link to the original information. The archived version on the Wayback Machine allows one to click to all the links. Another service is assisting citizens in obtaining open and easy access to public documents via the Free Law Project called RECAP. In addition, the Free Law Project provides access to approximately 6.5 million documents.

The organization worked with Georgetown and Harvard to implement Controlled Digital Lending. Institutions owning digital versions of books can lend them as long as two controls are in place. 1) Institutions can lend one digital version for every print copy owned. 2) The institution uses digital management rights managed. Twenty major libraries are participating in this effort.

Mr. Graham reviewed additional services and invited all to visit their San Francisco building for a lunch and tour given each Friday.

**Abbie Grotke, Lead Librarian, Library of Congress Web Archives, “Using the Library of Congress Web Archives”**

Unlike the Wayback Machine, the Library of Congress takes a focused approach to web archiving and does not include all U.S. government sites. The core focal point for U.S. government inclusion is on the legislative and select executive branch sites, courts, international, and global content.

Librarians have organized the Web Archives by broad theme and event-based collections. Subject areas include business and economics, folklore and folk life, US and foreign elections, political science and public policy, government publications (US and foreign), international tribunals, and legal and law blogs. Since the Library does not have legal authority to archive data, project leads reach out to secure permission from private sector site owners before beginning preservation efforts. Programmers use specific scoping instructions when crawling the web for information to add to the content. Ms. Grotke encouraged all to view their program page for additional information.

Highlighted dates for collections:

- 2002 – Congressional websites
- 2003 – House, Senate, and Committee members with monthly collection including social media accounts
- 2005 – Great growth in Web Archive due to introduction of YouTube
- 2007 – Thematic law collections began with monthly collection of data
- 2014 – Legal Blogs Web Archive, Federal Courts Web Archive, Foreign Law Web Archive, and International Tribunals Web Archive

A pilot project is underway documenting state government websites. The Library has been collaborating with states to capture US state-level documents historically received by the Library in print that are now only available online. Another project initiated in the last few months is the Indigenous Law Web Archive, which is under an embargo until February 2020.

Library staff provide descriptive records as a means to access LC archives. This is a huge undertaking, so they are working on automating the process. The researchers have browsing and faceted searching of records available on the website.

LC is in the early stages of gathering government data sets. Blog posts are available that discuss this feature. One short fall is that the site does not have full-text indexing, making it difficult to extract data for research use. They are working with partners to enhance the ability to provide useful information. They are seeking feedback from the public on how this might be useful.

**Clare Stanton, Communications & Outreach, Harvard Law School, Library Innovation Lab, “Perma.cc”**

Perma.cc is a project built to help eliminate legal link rot. The primary purpose is to support “user driven collections.” This prevents webpages needed for citation from being unreachable. This allows people to archive their work in the moment.

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It is easy to use simply by using copy and paste. The user pastes the URL into the interface, and it creates a perma.cc link that lands on the archived version. Ms. Stanton recommends creating a regular citation with a note that the link is archived at perma.cc. The link goes back to Harvard where it is stored and mirrored to the Internet Archive. This is user-driven technology that, instead of crawling the web, captures data.

Access to Perma.cc is through the Perma.cc link itself. Users come across the link when using articles that contain the link. There are over one million citations in perma.cc. Schools, law firms, and nonprofits use Perma.cc. Tools are available that assist the user in making workflows easy to organize perma.cc links. A batch link creator is available for large projects. The ability to toggle between a private and public record is available.

Over 200 law schools are offering students access to Perma.cc. Students use Perma.cc for journal citations. Professors use it for syllabi to ensure the information is available to students. In the last year, Perma.cc has been available to law firms and non-legal entities such as journalists, nonprofits, and book publishers. Over 1000 cases in Westlaw contain Perma.cc links.

In the non-legal context, journalists are interested in the software, especially in a time of “publication rot” and where the authenticity of the information is in question. Nonprofits are adopting Perma.cc to assist with web-based reporting and recording their own publications.

Ms. Stanton shared statistics about the percentages of link rot in the U.S. Supreme Court cases, 50%, and the Harvard Law Review, 66%. In thinking about the future, she compared using Perma.cc with visiting the dentist and being reminded to floss daily. Librarians should consider being the “dentists” of the information world and remind others to take measures to protect their work for future generations.

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## ***Program Report***

### **Process Improvement to Effectively Manage Your Law Library**

*Angela Sinhart  
Fordham University*

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Katherine Lowry, Director of Practice Services at BakerHostetler, gave a presentation on the advantages of pairing up legal research services with the principles of project management in order to effect change and stimulate innovation. She gave a brief overview of project management basics and methodologies, followed by a real-life example. Lowry advocates using project management techniques in library projects because it empowers the library team and highlights their expertise. Project management also helps with aspirations for working with innovative projects that involve integrating with other organizational departments outside of the library.

In an engaging and energetic manner, Lowry skillfully distilled the basic concepts of project management. Lowry stated that a project is a “temporary endeavor” that “has a beginning and an end.” This definition is necessary to distinguish project work from daily work that is used to keep an operation running daily. Project management is the strategic application of a set of standards that will favor the “attainment of a specific objective.” The project manager is the group leader with the knowledge of how to plan, how to assess value in order to prioritize tasks, and how to measure success. Other roles in a project are the project sponsor, the stakeholders, and the team members. All of these roles interact to move a project forward. Lowry said that, “a disciplined approach to project management will close the gaps that result from poor project performance,” and this involves a blend of tools, process, and people.

Lowry also broke down other foundational concepts in project management. There are five sequential phases in the life of a project. They are: (1) identification, (2) mobilization, (3) definition, (4) execution, and (5) closure. The first three phases comprise the planning portion of a project. Each phase is separated by a “phase gate.” This is where the project manager will present the overseeing authority with what was accomplished and then ask for approval to proceed to the next stage. Adherence to this framework places more emphasis on planning and communication over execution. This is wise because it is a mistake to chase a solution without a plan. When dealing with innovative projects, Lowry mentioned a procedural sequence containing the following three steps: build, measure, learn. Innovation involves an “iterative learning process” which calls for the team to loop back through those three steps because of what was learned.

Lowry explained the two types of methodologies used in project management, waterfall and agile. Waterfall methodology is a traditional approach, suitable for projects that have steps that are clearly defined and sequential. Agile methodology is more suitable for learning situations and allows for continuous improvement throughout the steps. It is more realistic to combine and customize the two methodologies.

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Moving to more specific methods, Lowry introduced Kanban and Scrum. Kanban is a visual workflow system. The centerpiece of this method is the Kanban board. The Kanban board is divided into three lists: to-do, doing, and done. The work is shaped into “manageable chunks” and placed in one of the lists. Lowry said that the board has several functions that facilitate project success. It is an effective way to communicate across the team, allowing all to visualize the work process. Experienced project managers use the board to control the flow of work by how many to-do tasks are released. This counters the pressure to start and do everything at once. Scrum is also a method that organizes the work into small pieces, but it concentrates more on delivering completed work in the shortest time possible. The to-do items are called the product backlog. The lead person, or Scrum master, will take the most highly valued to-do items and put them in a small group that will be completed within 2-4 weeks. This is called a sprint, and it is always defined by a time period. Lowry mentioned using specific project management software like Kanban Tool (<https://kanbantool.com>) and Smartsheet (<https://www.smartsheet.com>).

The real-life application of project management involved a machine learning project that Lowry administered. The project started from a question as to whether it was possible to create an algorithm that would predict patent growth. As project manager, Lowry defined the business need by doing feasibility tests. She decided on what specialists would comprise her team. This endeavor needed a legal researcher who could cull vast amounts of historical data and help organize it. With the presence of multiple variables and uncertain parameters, this project required agile methodology with a customization of Kanban and Scrum. Lowry emphasized that the most important takeaway is that legal researchers should use project management principles to improve library project performance and participate in more innovative practices.

The PowerPoint slides and audio recording of this presentation are available on the AALL website at <https://www.aallnet.org/recording/aall2019-e5-processimprovement/>.

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## ***Program Report***

### **OBS-SIS Hot Topic**

*Heather Buckwalter  
Creighton School of Law Library*

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System migration is a hot topic. Even if you have recently migrated, you want to hear about others’ experiences because you wonder if they encountered the same problems that you did. With four speakers, each having recently migrated or soon migrating to a new system, we heard different perspectives on four different systems. There were many reasons for migrating to a new library system, but vendor responsiveness and cost seem to be the most prevalent. For some libraries, their University Library chose the system for the campus with varying degrees of input from the law library.

Carol Collins, Associate Professor and Head of Technical Services, University of Tennessee College of Law Library, spoke about their experience migrating to OCLC’s WMS (WorldShare Management Services). They had a delay in getting their migration done. Collins also mentioned that WMS does not understand Serials. They had to take screenshots of their serials check in records so that they had the historical data. They were able to move local fields and notes, so this is an improvement from where WMS was a few years ago. They lost their acquisitions data.

Christina Tarr, Head of Cataloging, UC Berkeley School of Law Library, and Edna Lewis, Reference Librarian, UC Berkeley School of Law Library, spoke about Berkeley’s migration to TIND. TIND seems to be very responsive to a library’s concerns and needs. The migration went smoothly. The Public view and Private view are very similar. They can create collections, and these collections are featured on the front page of their Public view. Everything in the database is searchable, but there is not an index browse function. They can do global updates on records within the system.

Heather Mitchell, Head of Technical Services, Camden Rutgers Law School Law Library, spoke about Rutgers’ interesting migrations. (Yes, that’s migrations plural). First, in 2015, Rutgers Law Library migrated to KOHA. The idea of Open Source seemed to be the selling point. Now the Law Library is about to join the University Library’s system, which is Alma. So, it won’t be a traditional migration as the University Library is already on Alma. It would be interesting to hear from Heather Mitchell next year as to how the migration went.

Christopher Thomas, Electronic Resources and Metadata Librarian, University of California, Irvine, discussed their move to Ex Libris’ Alma. Thomas mentioned that they are dealing with a lot of data cleanup, something we are all familiar with.

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## ***Program Report***

### **Things You Need to Know Before Moving to a New ILS**

*Jennifer Noga  
Wake Forest School of Law*

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When it comes to integrated library systems, libraries fall in one of three camps: in the process of migrating to a new system, considering a system migration, or recently completed a system migration. Changing user needs and dissatisfaction with legacy systems has led to widespread system migrations across all library types, and law libraries are no exception. This program, therefore, was very timely in addressing the things you need to know before moving to a new ILS. The program consisted of a panel with librarians from different environments and with different perspectives: firm, academic, consortium, and public services. The members of the panel took turns discussing their experiences with system migrations, including what worked and what didn't. After the panel discussion, there was a question and answer period. Lastly, attendees were invited to split up by their type of library environment for smaller round table discussions led by panel members. The slides for this program provide a lot of details and are posted on AALL's website. I will provide a summary here of some of the major points discussed during the program and try to avoid repeating information that is already covered well in the slides.

Morgan Wood, Research Analyst at Holland & Knight LLP, started out by giving the law firm library perspective of a system migration. She talked about her library's reasons for moving to a new system and expectations of finding a long-term solution. She discussed their process for evaluating different systems and showed a rubric that they used for comparing the various features of the systems that were under consideration. They decided to go with KOHA because they found it easy to use, user-friendly, customizable, and cost-efficient. Their migration process went through eight steps, which are listed in the presentation slides. One of their main challenges after the move was getting users to switch to the new catalog; this was partly because they didn't switch off access to the old system, something she said they would do differently now. Ultimately, however, moving to a new system increased catalog usage by attorneys and raised their department's profile with constituents.

Christina Tarr, Head of Cataloging, and Michael Lindsey, Director of Library Web Development, both from the University of California Berkeley School of Law Library, discussed their library's experience moving to TIND. They talked about their reasons for moving to a new system and their process for preparing to migrate. That process differed from other libraries in that they hosted TIND developers on-site both in the preparation phase and post-migration to help with issues and make coding changes to the system as needed. TIND was described as more like a database with sophisticated searching capabilities that is being added on to with other (ILS-related) functions. This design seemed to present a lot of challenges in learning how to use the system but also included some unique features. They showed numerous screenshots of the clean, modern-looking interface and talked about its original functionality. It seemed that customer support was a big factor in their decision to migrate, so the close working relationship they described with TIND developers, as well as their ability to customize the system, are positive outcomes.

Jesse Lambertson, Head of Cataloging & Metadata at Georgetown, and Robert Bratton, Cataloging Librarian at George Washington, talked next about their library's experience with a system migration in a consortium setting. Georgetown and George Washington are part of the Washington Research Library Consortium, which includes nine universities and thirteen libraries. They all migrated from separate systems to one consortium library system on ALMA. Among their reasons for moving to a new, shared system were the consortium-specific issues of decreasing duplication and increasing resource sharing. Consortium-related preparations included moving local data to specific fields in records. They said that one of the many challenges is retraining the expectations of users, both internal and external, when it comes to the new system. However, they cautioned that no amount of preparation totally prepares you for the new reality with a different system. Library staff must totally re-think processes with a new system. They noted that updated workflows only become reality when the system is live, and then you realize that a lot of your pre-migration assumptions were wrong, necessitating a rewrite of policies and processes. From a consortium perspective, they now must coordinate a lot more on decisions, but at the same time, new expertise channels developed in the consortium, which has been a positive development.

Mary Kate Hunter, Reference/Government Contracts Librarian at The George Washington University School of Law Library, presented the public services perspective of the system change. The goals of the migration, as they saw it, included reducing patron frustration, supporting staff needs, and having a set workflow between departments. Among the many challenges she mentioned, a big one was simply acclimating to a new lingo. For example, in the new system, circulation is now fulfillment. In preparation for the migration, public service staff were involved in updating patron records, cleaning up course reserves, and training. Reference staff tried to update LibGuides and other documentation as much as possible before the migration. She also described their issues with interlibrary loan during the migration, some of which are ongoing. Ultimately, their approach as public services staff was to be patient with the whole process and leave technical services staff alone. For instance, she suggested that it might be a good time to go on vacation. Post-migration, she said that public services staff can

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get involved in promoting the new system and explaining what is new and different. Their library is still working through some post-migration issues, including understanding the discovery layer, but students seem to like the new system.

Program attendees asked a lot of good questions during the question and answer period and round table discussions. Here are some of the highlights of the points made during those latter parts of the program:

- Consortium panelists recommended keeping copies of local data, particularly to help identify data in a shared environment.
- Panelists emphasized the importance of a testing period.
- The UC Berkeley School of Law Library had one month of testing. They noted that they didn't anticipate how much training would be needed and that the set-up of policies and processes was more complicated than they anticipated.
- The 80/20 rule was mentioned, and attendees were warned to prepare as much as you can for a system change, but don't fool yourself into thinking that you can plan for everything.
- Panelists recommended taking advantage of all the training offered by the vendor.
- Regarding training, some vendors offered more of a "train the trainer" approach while other vendors offered training sessions for all staff. It was noted, however, that a lot of the pre-migration training won't really stick until you start using the system. The law firm library made some of its own training videos specific to certain functions.
- The ongoing data cleanup projects associated with a system migration mean that just as many catalogers are needed post-migration in a consortium environment.
- Consortium panelists noted that batch-loading of vendor-supplied record requires a lot of coordination and communications with the other institutions.
- Panelists said that because testing environments are generic by necessity, they are quite different than the production environment.
- Librarians from the consortium environment said that every member library in the consortium has a representative on the main committee.
- It was noted that A LOT of time was spent in meetings pre-migration and in the early live stages.

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## ***Program Report***

### **Data Visualization to Help Set Firm Renewal Strategy**

*Sabrina A. Davis  
Norton Rose Fulbright US LLP*

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Speakers: Debra Pfeifer, Reed Smith LLP  
Melanie Cline, Buchanan Ingersoll & Rooney PC  
Jeremy Watson, Reed Smith LLP  
Rita Young, K&L Gates

It was obvious that a lot of preparation went into this presentation, as it mostly revolved around a very involved hypothetical related to the vendor contract renewal process, with the end goal of convincing the firm's CFO of their findings regarding which contracts to renew and which to terminate. The hypothetical was well-thought out (and even included an audience plant), but it is difficult to do it justice in a relatively brief written review. Therefore, this review focuses on the key points of the presentation, of which the basic theme was telling a visual story with your data to justify keeping or eliminating products.

First, the introduction focused on the need for firm librarians to make a business case for everything, i.e., to tell a story, which should include charts that need no explanation. The data story should show the people, processes, and products involved as well as demonstrate the need for "customized solutions."

Second, the hypothetical described three stages of the vendor contract renewal process: (1) process; (2) analysis; and (3) strategy. Most of the presentation focused on the "process" stage, which involves getting, cleaning, and analyzing/visualizing data. The presenters identified three ways to obtain data: find it (from IT, marketing, vendors, etc.); get it (from third parties like OneLog); and create it (using surveys or third-party consultants). Cleaning data involves validation (comparing firm and vendor data, scrubbing duplicates, etc.); analysis (recognizing trends, finding potential for changes in behavior, etc.); communication (creating reports to tell stories, establishing procedures — e.g., what, how often, and level of detail to report); and repetition (automated scheduling and delivery are important). When analyzing/visualizing data, one should: (1) decide on the data sources; (2) look for patterns of interest or concern; and (3) find ways to tell the story. Next, in the "analysis" stage, librarians should look at which products users are using and how. Lastly, the "strategy" stage involves determining what information to present and how to present it to the powers that be.

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Third, most of the “data visualization” options presented were different types of Excel charts (e.g., table, bar chart, tree map, trend line chart, etc.), with the goal of choosing which type of chart best tells your story, such as a pie chart for subscription prices or a line graph for year over year increase. Although some more software options were identified on a slide, the presenters did not really discuss them more than mentioning Power BI. One thing to keep in mind is using the colors consistently throughout your charts—the same color for each vendor over all of your charts.

Finally, the presenters effectively made the seemingly dry process of looking at data more fun and turning it into a colorful chart with meaningful numbers made a fake law firm almost seem real. By the end of their presentation, I wondered if they made their CFO agree with their findings.

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## ***Program Report*** **Innovation Tournament**

*Wendy Moore*  
*University of Georgia*

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The AALL Innovation Tournament is an initiative hosted by AALL and sponsored by LexisNexis to showcase creative legal information workplace solutions undertaken by AALL members.

Applications for contestants were solicited by AALL with a May 17 deadline. A subteam of the Annual Meeting Planning Committee (AMPC), consisting of members representing different library types, then reviewed the entries and selected the three finalists who participated in the tournament. The finalists were:

- **Erik Y. Adams**, Research Analyst at Sidley Austin LLP, and **Martin J. Korn**, Director of Research and Knowledge Services, at Sheppard, Mullin, Richter & Hampton LLP – TEST
- **Andre Davison**, Research Technology Manager at Blank Rome LLP – Integrated Library System EOS
- **Allison C. Reeve**, Library Manager at Littler Mendelson, P.C. – California Tentative Rulings Database

The finalists had up to five minutes to make their pitches, and then the Panel of Judges were given up to five minutes to ask questions of the finalists. The panel of five judges were **Owen Byrd** (Lex Machina and sponsor representative), **Catherine Monte** (Fox Rothschild LLP), **Scott Vanderlin** (University of Chicago D’Angelo Law Library and one of the 2018 tournament winners), **David P. Whelan** (Law Society of Ontario), and **Beth Williams** (Stanford University). Judges used the following criteria to evaluate and score the finalists:

- Clear articulation of the problem
- Clear articulation of the innovation
- Detailed demonstration of who will be served
- Approach is novel/unique/creative
- Information provided suggests a likely successful outcome if the innovation is implemented

The first finalists to present were Adams and Korn, who proposed creating a suite of training materials geared toward legal information professionals to help them learn to develop Python-based machine learning or AI systems. While hands on training materials do already exist, none use real world data sets drawn from the legal environment, resulting in learning models that lack utility in law firm environments. They noted that their biggest challenge is putting together the data set itself, but they have identified ways of gathering those data points using several methods.

The second finalist to present was Davison, who is pursuing seamless digital access using SAML to individual secondary sources available in Westlaw and Lexis Advance through his firm’s Library OPAC. The goal is to get SAML to authenticate the user in Westlaw or Lexis Advance and then take you to the non-billable table of contents. This innovation would eliminate multiple clicks, password issues, client numbers, and searching platforms for specific titles. It will also direct firm use of these resources through their ILS/Intranet, allowing them to gather more information about which resources are being used and by whom. Davison finished up his presentation by swinging a baseball bat to knock the goal out of the park. Seamless user access - isn’t this the dream of all librarians?

The third and final presentation of the session was finalist Reeve, who proposed building an expanded California Superior Courts tentative rulings database in order to gain insight into recent judicial rulings. The database results would provide context, an historic archive of decision making, and analytics on judge and court behavior. This innovation would build off the existing Santa Clara Tentative Rulings Database used by her firm’s California-based offices. A product like this could even eventually expand to cover other states. Audience members working in or with firm offices in California were definitely excited about the possibilities a platform like this one could offer their users.

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Following the presentations, a live online poll was held to determine the Audience Choice Award while the judges' scores were tallied. The two awards of \$2500 each were presented by judge and sponsor representative, Owen Byrd of LexisNexis' Lex Machina.

The 2019 Innovation Tournament Winners were:

- The **Audience Choice Award**, which was selected by audience members using a live online poll, was awarded to Andre Davison.
  - The **Judges' Choice Award**, which was determined by the judges using their scoring rubric, was awarded to Allison C. Reeve.
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*Continued from page 1*

- Where does the funding for this infrastructure come from?
- How do we incorporate preservation considerations into our publishing and acquisition workflows?
- How can information professionals articulate the importance of digital preservation in a way that resonates with multiple stakeholders?

The Task Force, whose membership includes Keller, James Phillpotts (Oxford University Press), Wendy Robertson (University of Iowa), and Heather Staines (Massachusetts Institute of Technology, Knowledge Futures Group), has developed some key guides and documentation for NASIG and the larger community of technical services, scholarly communication, and publishing practitioners. One guide, "Digital Preservation 101," provides a helpful overview of preservation activities and tools, such as LOCKSS (Lots of Copies Keep Stuff Safe) and Portico. Another guide, "Talking Points and Questions to ask Publishers about Digital Preservation," is designed to facilitate meaningful discussions between publishers and librarians. When negotiating with publishers and vendors, it can be difficult to know what to ask for and how to frame questions and requests. This guide can be used to prompt important discussions about how publishers are preserving their content, whether they are contractually obligated to do so, and how they determine which kinds of content (i.e. errata and corrected versions) to preserve. These guides are available at <https://nasig.wordpress.com/2018/04/27/nasig-digital-preservation-task-force-guides/>.

The Task Force also distributed a survey to the library community and analyzed the results. One trend the survey revealed was that the majority of respondents do not have preservation policies. The Task Force hopes to work towards a template or model preservation policy that will help institutions incorporate preservation planning into their mainstream operations.

Additional survey findings are included in Keller's presentation slides, which are available at [https://static.sched.com/hosted\\_files/nasig2019/5a/Demystifying%20Digital%20Preservation%20NASIG2019.pdf](https://static.sched.com/hosted_files/nasig2019/5a/Demystifying%20Digital%20Preservation%20NASIG2019.pdf) (no login required). The NASIG Board recently approved the recommendation that the Task Force become a Standing Committee, so there will be additional updates in the future as this timely and relevant work continues.

### **RDA Toolkit Redesign Workshop**

ALA Preconference Workshop, Washington, DC, June 21, 2019

Jean Pajerek

Cornell Law Library

Those who signed up for the ALA pre-conference "RDA Toolkit Redesign Workshop" anticipating an 8-hour deep dive into the redesigned RDA Toolkit probably came away from it disappointed. Whether seeking elucidation of the theoretical underpinnings of the redesigned Toolkit, hoping for an overview of the practical impacts we can expect on our day-to-day cataloging once the new Toolkit is implemented, or simply wanting to learn how to navigate the new Toolkit, participants were likely to experience dissatisfaction from this workshop, which provided none of these.

The workshop entailed almost no direct interaction with the beta Toolkit. Instead, participants spent the beginning of the workshop getting a crash course in using RIMMF (RDA in Many Metadata Formats), which is software intended to help catalogers "think in RDA" without the constraints of the MARC 21 format. I had used RIMMF before, having attended two "Jane-a-thon" sessions at which RIMMF was used. Nonetheless, I felt a bit lost as Deborah Fritz, co-creator of RIMMF, rapidly demonstrated the beta version of RIMMF 4, which incorporates the changes made to the revised RDA Toolkit. As for the people who had never used any version of RIMMF before, I can only guess as to how confused they may or may not have been.

Upon entering the workshop, participants were asked to choose from among nine tables in the room, with each table focusing on a different kind of material or cataloging issue: static single works, appellations, aggregates, diachronic works, and representative expression elements. Each table had its own examples to catalog using RIMMF, under the guidance of an RDA expert.

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My table focused on print aggregates, using mostly Jane Austen-related examples. Using RIMMF to try to catalog these resources was challenging and interesting, but frustrating at the same time, because we were not told what the “right” answer was or even if there WAS a right answer. The experience could have been improved by having our table expert systematically go through each example with us, reviewing the issues presented and how they might be addressed using the revised Toolkit, but this did not happen (at least not at my table).

The other major shortcoming of the workshop, in my view, was that the nine tables never got to share with each other what problems they had encountered and what they had learned from the examples they worked on. It would have been helpful to have been given access to a file of correctly cataloged examples from each of the tables to go over after the workshop.

It’s possible that this workshop would have been less disappointing if it had been advertised as a RIMMF-based exploration of various cataloging scenarios, incorporating concepts and terminology from the revised RDA, so that attendees would have a better idea of what to expect. Advance exposure to RIMMF 4 could have helped those who had not used it before. Unfortunately, after spending eight hours at this workshop, I feel no better prepared for the implementation of the revised RDA than I did before.

### **Novel Collaborations: Pioneering New Models for Library/Vendor Partnerships with the FOLIO Project**

ALA Annual meeting 2019, Sunday, June 23, 2019

Jackie Magagnosc  
Cornell Law Library

This presentation was given by Jesse Koennecke, Cornell University Library and president of the FOLIO Product Council; Lynn Bailey, Index Data; Kevin Kidd, Wentworth Institute of Technology; and a representative of EBSCO Information Services.

The presentation started with Jesse Koennecke describing the background and structure of the FOLIO Project. FOLIO is an acronym standing for the Future of Libraries is Open. The project is a collaboration between libraries and consortiums such as Cornell University, Duke University, and the Five College Consortium, developers such as EBSCO and Stacks, and vendors including EBSCO, ByWater Solutions and Harrassowitz, in building an open source library services platform. According to Koennecke, one of the advantages of open source is that it allows anyone to work with the code. FOLIO’s structure is a modular micro-services architecture. Each function is its own tool, an app, and each app functions independently. FOLIO’s organizers envision a vibrant ecosystem with many partners providing economies of scale.

FOLIO is being designed to support multiple metadata formats from the beginning. The first adopting library, Chalmers University of Technology, plans to import catalog records from the Swedish National Library’s BIBFRAME-based catalog instead of MARC records. FOLIO is being designed with the ability to integrate multiple knowledge bases from different sources. The full collection view is planned to include material traditionally managed/presented in an integrated library system, plus electronic resources, archival resources, and institutional repositories.

How is FOLIO unique? It grew out of the Kuali OLE (Open Library Environment) project and is part of the open source development movement. EBSCO has provided financial backing; Index Data and others are developing the software. The project is governed by a council of equals; all decisions are made and priorities are set by representatives from all parts of the organizations including libraries and vendors. The libraries involved in the project range from small institutions, such as the Wentworth Institute of Technology, to ARL members. The vendors involved have demonstrated experience in open source work. FOLIO’s governance model—a Product Council, Special Interest Groups, and Product Owners—is designed to provide cohesion and is focused on the need to build consensus around decisions.

Kevin Kidd continued the presentation. Kidd presented slides contrasting the traditional waterfall development process, driven and owned by a vendor, with the “ecosystem” of FOLIO development featuring many participants. Within the FOLIO project, Subject Matter Experts (SMEs) and Special Interest Groups (SIGs) collect information about desired features that are translated into “stories” for the developers. The project uses an iterative, agile development model instead of a waterfall process. Project groups are working simultaneously on many products that will eventually work together. The code is owned by the Open Library Foundation (<http://www.openlibraryfoundation.org/>) and is available in an open source repository.

For more information about FOLIO, see the project websites at <https://folio.org> and <https://wiki.folio.org>.

Slides from this presentation are available at <https://www.eventscribe.com/uploads/eventScribe/PDFs/2019/8129/896718.pdf>.

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## **Improvement Through People: Transforming the Technical Services Workforce for Better Service**

ALA Annual, Washington D.C., Sunday, June 23, 2019

Cate Kellett

Yale Law School

**Speakers:** John Huber, J. Huber & Associates; Jenny LaJeunesse, Gwinnett County Public Library; Marlee Givens, Georgia Institute of Technology; Sofia Slutskaia, Georgia Institute of Technology (moderator).

Technical services departments at various types of libraries continue to reorganize their staff and workflows to enhance efficiency and better suit their organizations' ever-changing needs. This panel explored the lessons they learned during two extensive reorganizations: one at a public library and one at an academic library.

John Huber, President of J. Huber & Associates, discussed how lean principles can transform any organization, including libraries. As a lean consultant, he doesn't tell clients what changes to make. Instead, he teaches them the tools they need to design their own changes from within. The staff most affected by the changes must drive the process from the beginning to the end. Full participation helps ease major reorganizations. People often resist change because they fear the unknown, but if they participate at each step, there is no unknown, and the fear disappears. As an example, he showed the workflow map that the staff drew at Gwinnett County Public Library before they reorganized. It was very complicated, and materials crisscrossed throughout the physical space provided a visual illustration of potential redundancies within the department. After the reorganization, the new workflow map showed direct routes with almost no crisscrossing, illustrating a more efficient process. Jenny LaJeunesse, Technical Services Director at Gwinnett County Public Library, started her position after her team finished the lean transformation process, but she was immediately impressed by the department's continuing efficiency. The changes didn't end with this one project. Instead, her staff are not afraid to fail and continuously experiment with new procedures to further improve their workflows.

Marlee Givens, Librarian for Modern Languages and Library Learning Consultant at Georgia Institute of Technology, described using various business principles, including supply chain analyses, to completely overhaul the entire library system. This required extensive retraining of all staff, including group exercises that had everyone role play their contributions to the workflow. This allowed them to see where their tasks fit into the process as a whole. She also noted that this was a top-down reorganization, making it highly complicated and much harder to implement than Gwinnett's single department project.

### **SLA 2019 in Cleveland—a conference of cultural competency and technology**

Jesse A. Lambertson

D'Angelo Law Library

University of Chicago.

SLA Annual 2019 in Cleveland was an educational event across several fronts.

Despite the weather in DC that restricted travel for a few speakers, the conference went over very well—particularly in the area of cultural intelligence and diversity (at least for me), but also in the area where collections meet metadata and technology.

SLA 2019's closing keynote was delivered by Safiya Noble, who talked about her book, *Algorithms of Oppression*, and went through some examples of culturally biased (racist) search results in google.

- This talk from her book noted some serious query results, indexing, and associations encoded into their search algorithms.
- Tools built on math and programming languages take on lots of elements of the culture in which they are produced. For one, it was super important to see the intersections of technology and culture.
- We should probably accept that all tools are built into their cultures and that without some higher level, wider discourse on the code-base behind these corporate owned 'free' tools, we will not make much progress in this area. I personally believe we should not use these tools just because they exist. We should engage, at some level, in their production and understand better how they work. Ideally, there is space here for libraries to host technologies that are structured differently (my 2 cents).
- Truth be told, I know we have an indigenous law classification now, and we have discussed biases in subject headings—I think we need to become better acquainted with the myriad of ways in which metadata and culture cross paths in society at large.

I, on behalf of the Diversity, Equity, Community, and Equity Caucus (DICE, as we call ourselves), proposed two events related to diversity and inclusion.

- One was the business meeting, just to bring out ideas that need ironing out within the association related to D & I.

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- We also ‘hosted’ an incubator session during which a conversation was started by Travis Ferrell where we asked ourselves exactly what a library could or could not to assist citizens returning from incarceration (the longest discussed topic that day).
  - An off-the-cuff relevant thought: Some years ago, I talked with a web designer who had planned to host a mirror of the metadata for Occupy Library of books that were confiscated by the NYPD – I wonder if a web-accessible record set for resources for returning resources might be something that technically inclined folks across institutions might want to collaborate on.

Some more subtle interplays between technology, collections, and culture were realized during a scheduled tour of the Rock ‘n’ Roll Hall of Fame (HoF) Library & Archives:

- The Library is located about 2 miles south/southeast of the museum proper.
- On the web: <https://library.rockhall.com/home> (no mission statement listed)
- Researchers can get access to materials located in the library—but a lot of the requests come from HoF folks putting together press things for inductees (external press also requests a lot)
- The collection, kept cold and dry by all the standard library and archival technologies, gets catalogued and described to the degree the staff can maintain.
- A point made clear to me: the collection development policy of the library and archive follows the mission of the museum. Even though researchers use the collection a lot, the collection more closely follows the inductees—not music history at large. This simply means, and we all know how this works, we get to catalog and describe what our employer actually acquires.
- That collection policy helps maintain a limit on acquisitions, the space apportioned for those acquisitions, and the number of staff—we all know it’s a continual balance beam.

Upon the completion of Safiya Noble’s fabulous keynote, I dashed to a cultural intelligence focus group discussion at the Cleveland Public Library main branch downtown. Imagine that... helping a colleague with research, contributing to a meaningful cultural conversation, and doing so in a beautiful library space. I think that was a very good close to my SLA 2019 conference time.

### **Library of Congress Faceted Vocabularies**

New York Technical Services Librarians Workshop, May 15, 2019

Jackie Magagnosc

Cornell Law Library

I was fortunate enough to attend a full day workshop, given by Adam Schiff, focused on Library of Congress Faceted Vocabularies. The workshop was sponsored by the New York Technical Services Librarians (NYTSL) organization and hosted by Columbia University’s Butler Library.

Schiff began his presentation by providing background information. He reminded the audience that, historically, Library of Congress Subject Headings (LCSH) have contained information both describing what a resource is and what it is about. Starting in 2007, the Library of Congress has been developing controlled vocabularies to capture these characteristics of works with the long-term goal of transferring this information out of subject headings into dedicated fields. The MARC fields/subfields for these vocabularies are a mix of existing (e.g. 655 for Genre/form) and new (e.g. 380 for form of work; 385 and 386 for demographic group characteristics). Schiff made certain that the audience understood that LC has not fully implemented these terms and fields for all of its cataloging, there are no changes to current policy, and that LC has no plans at this time to cancel LCSH or form subdivisions that overlap with genre/form terms.

The workshop focused on Library of Congress Genre Form Terms (LCGFT) and Library of Congress Demographic Group Terms (LCDGT). Schiff touched briefly on several other vocabularies, such as Music Medium of Performance (LCMPT), but the majority of time was spent on LCGFT and LCDGT. For each vocabulary, Schiff reviewed general application principles, sources for the controlled vocabulary, and pertinent MARC coding. He explicated many examples for the audience before attendees completed exercises designed to test attendee’s knowledge.

LCGFT was the most familiar vocabulary covered. MARC field 655\_7 with \$2 lcgft is used to encode this information in the bibliographic record. The vocabulary includes terms for artistic/visual works, cartographic materials, “general” materials, law materials, literature, moving images, music, radio programs, and religious materials. A draft manual for LCGFT is available at <https://www.loc.gov/aba/publications/FreeLCGFT/freelcgft.html>. The actual terms can be accessed many ways, including ClassWeb, Cataloger’s Desktop, and free pdfs. Schiff reminded attendees that while the terms have corresponding LSCH or form subdivisions, the vocabularies are not identical, e.g. LCSH \$v Congresses is equivalent to LCGFT Conference papers and proceedings.

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LCDGT is less familiar territory. This vocabulary is designed to provide information about audience and creators/contributors to resources that are out of scope for LCGFT. MARC fields 385 and 386 have been developed to provide a place to record this information. The vocabulary should be used in tandem with its manual, available at <https://www.loc.gov/aba/publications/FreeLCDGT/freelcdgt.html>. Care should be taken when assigning LCDGT to creators to base the analysis on self-identification as a member of a particular demographic group and to avoid making assumptions based on photographs and/or names.

So why would we want to do this? Separating a resource's "whatness" from its "aboutness" should enhance our user's discovery experience. Inclusion of demographic information about intended audience or creator characteristics provides discovery functionality not readily available using more traditional descriptive methods. Additionally, recording these information points separately is much more Linked Data friendly. To see how this plays out, visit the University of Washington's experimental faceted catalog at <https://tinyurl.com/y2pg6sy3>. A barrier to full implementation of these vocabularies is the difficulty inherent in extracting the information from the mix of subject and form information embedded in our current use of LCSH in the MARC 6XX fields.

Schiff has presented extensively on the application of Library of Congress Faceted Vocabularies. Links to the slides and exercises used for this workshop, along with many others, are available at his faculty page at <https://faculty.washington.edu/aschiff/>.

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## ***Technical Services Law Librarian (TSLL) Annual Report July 2018-June 2019***

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The *Technical Services Law Librarian (TSLL)* volume 44 had four issues, published in PDF and available on the *TSLL* website at <https://www.aallnet.org/tssis/resources-publications/technical-services-law-librarian/> and on HeinOnline at <https://heinonline.org/HOL/Index?index=lcc/tsll&collection=aallar> (note that there is a one year embargo on full text access via HeinOnline). Michael Maben completed his tenure as editor-in-chief with issue #1, and Jason LeMay took over the position of editor-in-chief with issue #2. We are extremely grateful for the assistance (and great patience) of Stacy Fowler, Associate Editor; Julie Stauffer, Layout and Design; and Martin Wisneski, Web Manager. Through their hard work, all issues of volume 44 were published on schedule. The editor-in-chief also greatly appreciates the work done by our dedicated columnists and editorial board, without whom this publication would not exist.

A number of columnist changes occurred during this year. Emily Dust Nimsakont (Library Metrics and OCLC columns) left law librarianship this past year. Following Emily's departure, Rachel Decker took over the Library Metrics column, and Gypsy Moody stepped in as the new OCLC Committee chair and OCLC column author. Luz Verguizas stepped down from the Acquisitions column, which was then taken over by David Sanborne. Hollie White stepped down from Research and Publications after leaving AALL, and this column is now written by Mary (Molly) E. Brownfield. Finally, Crystal Alberthal stepped down from Serial Titles following the December issue, and Joy Humphrey stepped in to take over.

The only change among the editorial staff during the year was the position of editor-in-chief. Jason LeMay took over the position beginning with issue #2. On the editorial board, Larissa Sullivant and Elizabeth Outler completed their two-year terms. The other board members for 2018-2019 were Sara Campbell and Linda Tesar. I want to express my gratitude to Michael Maben and the board, and again to the editorial staff and contributors, for making my first few issues of *TSLL* go as smoothly as possible.

We are looking forward to the upcoming year and some of the changes that are in store. Our upcoming Annual Meeting issue in September will also be the debut of a new column devoted to reports from other conferences of interest to TS and OBS librarians. There are also some upcoming columnist transitions due to retirements and professional transitions, and while we will miss those contributors' columns, we look forward to new perspectives as well.

*Jason LeMay, Editor-in-Chief  
Emory University School of Law  
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**TSLL EDITORIAL POLICY**

*Technical Services Law Librarian* (ISSN 0195-4857) is an official publication of the Technical Services Special Interest Section and the Online Bibliographic Services Special Interest Section of the American Association of Law Libraries. It carries reports or summaries of AALL annual meeting events and other programs of OBS-SIS and TS-SIS, acts as the vehicle of communication for SIS committee activities, awards, and announcements, as well as current awareness and short implementation reports. It also publishes regular columns and special articles on a variety of topics related to technical services law librarianship.

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**Publication Schedule**

Issues are published quarterly in March, June, September, and December.

Deadlines (each vol/year):

- no. 1 (September)..... August 21st
- no. 2 (December) .....November 21st
- no. 3 (March) ..... February 21st
- no. 4 (June)..... May 21st