THE CRIV SHEET

THE NEWSLETTER OF THE COMMITTEE ON RELATIONS WITH INFORMATION VENDORS

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Committee on Relations with Information Vendors (CRIV) Members

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R. MARTIN WITT
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Welcome to the final issue (no. 3) of Volume 40 of *The CRIV Sheet*. This issue is a combination of committee-based content and original authorship.

As we conclude Volume 40, I'd like to give my heartfelt thanks to Jim Gernert for his leadership of CRIV over this past year. His hard work, along with that of vice-chair C.J. Pipins and the rest of CRIV, has allowed us to have a very productive year. A special thank you to *CRIV Sheet* committee members: Pablo Arredondo, Alana Bevan, Gilda Chiu, Jim Gernert, and C.J. Pipins for their efforts producing the last three issues. I couldn't have done it without you.

Thinking ahead to 2018-2019, I look forward to what CRIV can accomplish with C.J. at the helm. Please be sure to stay tuned to *The CRIV Sheet*, to the *CRIV blog*, and come share your input with the committee and vendors at the **Committee on Relations with Information Vendors (CRIV) Vendor Roundtable** at the 2018 AALL Annual Meeting in Baltimore. There's a lot going on to talk about!

This issue of *The CRIV Sheet* features an original article about the use of ServiceNow in a law firm library and an update on the preservation survey conducted by CRIV this past year. *The CRIV Sheet* committee has also identified a number of programs at the 2018 AALL Annual Meeting that we think may be of particular interest to our readership. Finally, we also have the complete second set of 2017-2018 CRIV Vendor calls.

In the coming year, please keep in mind that *The CRIV Sheet* can be a great way for you to share your conference experiences with those who may not have had the opportunity to attend. In Volume 40, we had CRIV Sheet Summaries written by attendees of the 2017 AALL Annual Meeting and a great recap of some of the programs at the Law Via the Internet Annual Conference. If you attend any conferences, including the AALL Annual Meeting, and are willing to write a recap of a program or event, please **contact me** and let me know.

Over the past year, we also introduced two new columns to *The CRIV Sheet*, for which we are constantly soliciting content—*Law Firm Focus* and *International Insight*. The former focuses on the private law librarian side of things, with the latter having a more international or foreign perspective. We hope items like these allow *The CRIV Sheet* to reach a wider audience, as there is almost nothing within law librarianship that is not in some way impacted by relationships with information vendors.

If you have any suggestions for columns, articles, or would like to contribute in any way, please do **get in touch**. *The CRIV Sheet* is written for you, the readers, and it is your willingness to also collaborate and contribute that makes it helpful and a worthwhile endeavor. See you in the fall!

FROM THE CHAIR

JIM GERNERT
LAW LIBRARIAN
SOCIAL SECURITY ADMINISTRATION

As we reach our final issue of *The CRIV Sheet* for this year, I wanted to say what a privilege it has been to serve as chair of this committee. Thanks to the hard work and enthusiasm of our committee members, CRIV has had a very productive year. We have produced three issues of *The CRIV Sheet*, kept the *CRIV Blog* up-to-date with a variety of interesting posts, conducted a survey of the major legal publishers regarding their preservation practices, and maintained our semiannual vendor relations calls with legal publishers. I commend all of our members for their dedication in making these projects happen.

Inside this issue, you'll see that we've highlighted a number of programs at the upcoming AALL Annual Meeting that have particular relevance from CRIV's perspective. I think that anyone involved in acquisitions can appreciate the issues identified in "**Oh No, Not This Renewal Again**," as well as the challenges that led to "**Compressing an Elephant: How We Shrunk Acquisitions and Collections Workflows by Developing Our Own Best Practices for Operational Excellence**." I would also encourage everyone to attend the **CRIV Vendor Roundtable** on Sunday, July 15th, from 1:00 p.m. to 2:00 p.m. Although we normally begin with a preset topic, there is always an open forum at the end of the Roundtable, which is the perfect opportunity for you to discuss any vendor issues that have been on your mind with senior library relations staff and management from all of the major publishers.

You'll also find our semiannual vendor relations reports inside this issue, which include updates from the four largest legal publishers on their new products and services, as well as issues that have been raised between vendors and librarians. One particularly thorny issue involves a reported LexisNexis policy of refusing to sell Lexis print and ancillary online products to law firms that don't renew their Lexis Advance subscriptions. CRIV has attempted to discuss this issue with Lexis, but so far Lexis has not provided an adequate explanation of the policy or made any effort to rescind it, so as of this writing (early April 2018) the issue is before the AALL Executive Board for possible further action.

Although I've already acknowledged the contributions of all of our CRIV members, I wanted to particularly note the hard work of those who make *The CRIV Sheet* possible: our *CRIV Sheet* editor R. Martin Witt, and committee members Alana Bevin, C.J. Pipins, and Gilda Chiu, who together have put in many hours to bring topical and interesting articles related to all aspects of vendor relations to your attention. Finally, in another tip of the hat to C.J. Pipins, I want to thank him for all of his work as vice-chair of CRIV this year, and wish him all the best as chair in the 2018-2019 term.

SERVICENOW FOR LIBRARY REQUEST TRACKING

MEGAN VON BEHREN
SENIOR RESEARCH SERVICES MANAGER
FRIED, FRANK, HARRIS, SHRIVER & JACOBSON LLP

ServiceNow is an information technology (IT) tool that automates IT operations for functions such as service management (aka incident management), CMDB (configuration management database), discovery and asset management, change management, release management, project management, etc. Its focus is on creating a single system of record for all IT processes within an organization. It keeps track of relationships between elements and automates processes and workflows between those elements. It is known in IT circles as being an excellent tool for management of Help Desk requests.

WHAT DOES THIS HAVE TO DO WITH LIBRARIES, YOU ASK?

ServiceNow's automation capabilities are ideal for service desk functions. It can automatically create tickets from emails and phone calls, automatically filling in key information such as users, contact method, category, and type of request. Because it can automate functions, it's able to track a lot of information about a request without it being necessary for humans to manually enter information about that request. For several years, the Fried Frank Research Services Department had been seeking a request tracking system. In 2014, we looked at several, including Knowledge Tracker, RefTracker, and Quest. Like most reference desks, our systems have been customized and fine-tuned to our attorney's needs and our researchers' practices, so we found the systems we looked at to be rather rigid and not customizable. In addition, because our IT department has limited resources to spare for non-attorney-facing applications, we were concerned about the support we would need to install an application.

Approximately two-and-a-half years ago, our firm hired a new Help Desk manager, and during the transition period I was called into service as the interim Help Desk manager. At the time, our Help Desk was using portions of the functionality available from a request-tracking system called TrackIt. TrackIt was a desktop application, difficult to deploy, rigid to customize, sporadically used, and full of years of data that lacked rigor. It was decided at that time that the firm consider upgrading to a more robust tracking system.

With the arrival of our new Help Desk manager, I was gratefully repatriated back into the Library, newly vested with the knowledge of how useful a tracking system could be. Based on my experience on a busy Help Desk, I truly understood the need for a system to monitor the ongoing and sometimes multiday, multi-layered resolutions of IT-related issues experienced by attorneys. I was also fortunate to have forged networking relationships with staff in our IT department, and saw possibilities for working together effectively. Thus, following the Help Desk manager's arrival, as we began to demo Help Desk ITSM products, I made the decision to piggyback on whatever product the Help Desk chose in order to capitalize on the IT resources they would have to install and implement with the product. Once we se-

lected ServiceNow, with its capabilities to encompass a variety of different types of service departments, the decision came to seem all the more appropriate. However, ServiceNow was no easy solution to implement. It would require extensive project management resources, several months of workshops to determine current state practices and future state requirements, coordination between different functional areas of the Information Services department, contract and license management both with ServiceNow and Service Delivery Solutions (the implementation consultant selected to install the product), and innumerable meetings and calls. A bargain was struck between the Library and the Help Desk: I would serve as the project manager for Help Desk's implementation, and they would assist with the IT resources needed for the Library implementation.

In retrospect, the deal worked out far better than we could imagine, although there were pitfalls, U-turns, and even wrong turns along the way. Because ServiceNow had such robust enterprise capabilities, we decided we would implement it for not only the Help Desk, but the entire IT department as well, since we had a variety of cultural change challenges to overcome in getting seasoned professionals to adopt new practices in tracking their tasks. In addition, we encountered a technical issue that we'd failed to recognize at the outset that took several months to resolve effectively and delayed the launch by several months. But in the end, it successfully launched for the IT department. Library implementation began a few months later, and I'm pleased to report that because the bulk of the kinks were worked out in the ServiceNow IT instance crucible, the Library implementation went relatively smoothly. In the end we needed very little technical assistance from IT to roll out the Library's instance since all the issues had been previously resolved. The IT department provided all the resources for their own rollout, and all the Library had to do was hitch our little wagon to their extensive machine. Mission accomplished!

There are a few facts to be aware of regarding ServiceNow. While it has extremely powerful automation capabilities and is infinitely customizable for departments and specific practices, it is not configurable by a layperson. All ServiceNow customers, unless they employ a dedicated javascript programmer, must hire a ServiceNow implementation consultant. We chose Service Delivery Solutions upon the recommendation of our ServiceNow reps, as they have other law firm libraries (as well as other law firm departments) as customers. Even with the help of a consultant, a staff person should be prepared to be the in-house contact to organize meetings and calls, and liaise with technical contacts. Someone must also be familiar with current state workflows in order to convey how you would like ServiceNow automation to function, whether it will emulate your current practices, or whether you would like to enact workflows that improve upon or change your current processes.

HOW DOES SERVICENOW WORK & HOW DO WE USE IT?

We are currently only using the Incident modules of ServiceNow (aka "request tracking"), one instance for Help Desk, and one for the Library. We will also be implementing Incident modules for our Conflicts department this year and the Asset Management module later this year. Other departments who are considering jumping on the bandwagon are Marketing and Secretarial. Incident uses what are known as inbound email addresses, which means it looks for emails coming to certain email addresses. (Behind the scenes, those emails need to be forwarded to a ServiceNow email address, so it can "see" them.) When it sees the particular email addresses it's looking for, it routes the "tickets" to either Help Desk or Library depending on the address. You can have as many inbound email addresses as you'd like. We had a little trouble getting it to differentiate between Library and Help Desk emails, because the Library likes to make use of the BCC (blind carbon copy) in order to make our processes look seamless to attorneys, and ServiceNow has

trouble applying that logic to BCC'd emails because when it's "blind," it can't see it.

A special requirement of the Library was to incorporate librarian email responses to attorneys into our tickets, which we did not do for the Help Desk at this time. (The configuration of how to make this happen didn't occur to us while implementing the Help Desk, and we only learned about the workaround that allowed it after site visits to other law firm libraries who are also using ServiceNow, underscoring the importance of networking with your colleagues to maximize this product's capabilities.) The capturing of responses to tickets was also not as much of a priority for Help Desk as it was for the Library; for us our "response" to a request is our work product, the actual "answer" to a request. Since necessity is the mother of invention, and because ServiceNow, with its super-flexibility, lends itself to creative problem solving, the solution presented itself after receiving inspiration from other librarians using ServiceNow, albeit with the inclusion of some slight workarounds that we weren't able to automate.

The Incident module has a dedicated email function that will append related emails and responses to a ticket, but we wanted to be able to continue using Outlook to take advantage of Outlook functionality and reduce the amount of change librarians had to go through. With a little fancy footwork, we were able to accomplish that. Initially, we focused heavily amongst our Library ServiceNow committee regarding how we would win the hearts and minds of librarians and convince them to embrace ServiceNow. However, after learning that another law firm library had created a method to reap the benefits of ServiceNow tracking, while continuing to work primarily via Outlook, we quickly decided to go with that approach instead. Luckily, our site visits happened early on, before our kick-off meeting, so it was easy enough to build this into our workflow. The hard part was conveying what we wanted to the consultant, but we used lots of flow charts and innumerable emails and phone calls to eventually convey our meaning. Our librarians are still on the fence about the few extra steps

involved, but we are confident we've implemented the least intrusive system possible that will still capture all of the data and work product we want to see.

Our workflow goes like this: An attorney sends an email to a Library email address (same email address the attorneys have always used, so they don't need to memorize something new). An Exchange rule forwards that email to our ServiceNow email address. ServiceNow looks at the email address the attorney used, and if it's a Help Desk email address, it routes it to Help Desk ServiceNow, and if it's for the Library, it routes it to Library ServiceNow. It then creates a ticket, auto-populating the following fields:

- Attorney's name auto-populates in the *Requestor* field.
- CC'd recipient auto-populates in the *Recipients* field.
- *Delivery Method* field defaults to Email (although other options can be chosen, such as Hard Copy, Phone, Sent Directly, etc).
- *Date and Time* auto-populates in the Created field.
- Name of the librarian editing the ticket auto-populates in the *Assigned To* field (although you can also enter the name of a different librarian instead of your own).
- *Request Status* field defaults to status "New" (and automatically changes to "In Progress" when the record is saved; this can be changed later to On Hold, Referred to External Department, Complete, or Cancelled).
- *Request Priority* field defaults to Medium (other options are Low, High, and Urgent).
- Subject line of the email auto-populates in the *Short Description* field.
- Body of the email auto-populates in the *Request Details* field.

Fields that need to be completed by librarians include:

- *Request Category* and *Type* (using a taxonomy we created, and including electronic services problems that allow for tagging of database names).

- *Related Request* (you can pin one or more different tickets to the ticket you're currently working on, so they can be grouped together).
- *Flag* for indicating that the ticket is "knowledge-worthy" and should be included in the Knowledgebase (we have not implemented this functionality yet).
- *Needed by Date* (optional, and so far unused).
- *Client Matter Number* (generated from a feed from our billing system, however, full integration has not been implemented; we must manually upload changes to the client matter table on a periodic basis).
- *Billing Narrative* (for the librarians to use to track their billable time records).
- *Time Worked* (for the librarians to enter the amount of time they worked; multiple librarians can make multiple entries in the field, and total time spent on the request is tallied in a table at the bottom of the ticket).
- *Work Notes* (by the librarian on work performed on the request).
- *Databases Successfully Used* (choices are generated by a table of database names that we can update).

We have also implemented automation for various common emails, such as vendor publications, invoices, and attorney routing list requests. Examples include automatically assigning them to the technical services staff person responsible and automatically entering category, type, and client matter number. Tickets can be edited quickly in an abbreviated list view, or can be opened up to see all the options.

Other elements of the ticket include:

- History of previous requests by the same attorney.
- A section for the librarian to request a revised *Category* and/or *Type*, which tags the ticket as "Pending." (We anticipated more negative feedback from the librarians on our taxonomy, and included this functionality in preparation; however, we've been pleasantly surprised that our taxonomy required very little massaging, and that

the librarians were amenable to the options we provided.)
- *Activity Stream*: a chronological log of all updates made to the ticket, including any emails exchanged between the librarian and the attorney.

An email automatically creates a ticket, but if an attorney calls or walks in, the librarian needs to create a ticket from scratch, although the date will be pre-populated and the librarian's own name will be pre-populated in the *Assigned To* field. (The Help Desk uses functionality that integrates their automatic call distributor phone system with ServiceNow, which automatically creates a ticket in a "screen pop-up" when the phone is answered, pre-populated with the attorney's name and other relevant information. We determined that since the Library does not use automatic call distribution, implementing this for us would not be feasible.)

The only field we have required is *Client Matter Number*. All other fields are optional. We wanted to make *Client Matter Number* required because it will help us generate better statistics on how our firm uses Research Services. If the attorney does not provide a client matter number, librarians will enter the number relating to the attorney's practice area. Incidentally, hovering over an icon next to the attorney's name provides his or her title, practice area, office room number, phone number, and cell phone. Typing keywords into the *Client Matter Number* field also generates pop-ups that provide relevant options for practice area numbers or actual client matter numbers.

Once the librarian enters a name in the *Assigned To* field and saves the ticket, a notification email is generated to the whole team letting everyone know who's working on the request. (These notification emails are highly customizable as to what logic generates them and what data is included.)

After a librarian completes a request, he or she emails their response to the attorney. The procedure we've developed, after much trial and error, is that we BCC one of our inbound email addresses, and place

the ticket number in the subject line of the email. If ServiceNow logic sees a ticket number, it appends the response to the relevant ticket. (If it doesn't see a ticket number, it will create a new ticket, but we have back-up logic searching for other identifying information which prevents Library tickets from routing to the Help Desk since ServiceNow is not able to process logic on BCC fields.) The appended email goes into an area of the ticket called the *Activity Stream*. The *Activity Stream* separates out each email in chronological order so you can see the progression from request, notification email, and finally response. If there is further correspondence with the attorney, as long as the ticket number is in the subject line and one of the inbound email addresses is in the To, CC, or BCC field, the correspondence will append to the ticket.

REPORTING

ServiceNow has extensive dashboard and reporting capabilities; however, as our implementation is in its infancy, we've yet to explore these options fully. Our consultant is in the process of creating dashboards to track the following, using lists as well as charts/graphs:

- New Requests
- "My" Requests (auto-generates for each person when they log in)
- Open Tickets by Librarian (using *Assigned To* field)
- All Open Requests (includes both New and In Progress)

- Requests by Practice Area; month to date and year to date
- Requests by Office; month to date and year to date
- Saturday Requests (includes By Practice Area, Average Time of Day for Request Submission, and Average Time to Complete Requests. Since we are not open on Saturdays, this is an area we wanted more insight into)

Reports and charts/graphs can also be completed on the fly from list views, and there are quick and easy list narrowing tools such as "Show Matching" and "Filter Out" for each field.

FINAL THOUGHTS

ServiceNow is a highly customizable tool, but is not for the faint of heart. An implementation consultant is a must. This tool has the ability to automate any number of operations, but these treasures can only be unlocked by a trained professional. It is primarily an IT tool, but thus far our firm has only used it for service tracking; we hope to implement additional modules in the coming months and years. It has the potential to provide insightful reporting and analysis that we are only beginning to tap into. Once it is configured, it is surprisingly bug- and error-free. It also works best on Chrome, not Internet Explorer.

AALL/CRIV-SPONSORED SURVEY: VENDOR PRESERVATION & HISTORICAL RESEARCH PRACTICES

CAROLINE WALTERS
COLLECTION DEVELOPMENT LIBRARIAN FOR U.S. & MATERIALS BUDGET
HARVARD LAW SCHOOL LIBRARY

During the 2017 AALL Annual Meeting in Austin, Texas, the CRIV Roundtable discussion revolved around the issue of preservation, both in the digital realm and in print. The conversation that ensued suggested the importance of a partnership between librarians and vendors to ensure our mutual goal: the stewardship, preservation, and access to historical legal materials. Librarians and publishers both share this responsibility as stewards of legal information. Working together, we seek to continue this dialog by

creating a baseline document of present-day preservation practices of legal publishers.

We hope this survey will help us to gauge present practices, elevate our concerns about access to historical legal materials, and signal the start of ongoing dialog between librarians and publishers to study the issues of digital-to-print migration.

The answers to these questions will be updated periodically and housed on the **CRIV Tools webpage**.

SURVEY QUESTIONS:

- **Q1:** Do you make all previous editions of your content available electronically for historical legal research?
- **Q2:** If not, will you consider adding a back-file of your content for historical legal research purposes?
- **Q3:** If you are not able to add a back-file of your content, going forward will you make previous editions available on your platform when a new edition is published?
- **Q4:** What preservation practices do you have in place to protect your company's body of work in print?
- **Q5:** What preservation practices do you have in place to protect your company's body of work digitally?

Following is a summary of the responses we received. Full responses to the survey are available on the **website.**

Q1: DO YOU MAKE ALL PREVIOUS EDITIONS OF YOUR CONTENT AVAILABLE ELECTRONICALLY FOR HISTORICAL LEGAL RESEARCH?

This question was the most difficult to answer, and in the future, the survey will be more explicit to distinguish between primary and secondary sources, such as previous editions of treatises. We received eight responses in total. Five publishers answered "yes" to the first question of the survey: ProQuest, PLI, Blomberg BNA, Fastcase, and Hein all, to varying degrees, make their historical content available electronically.

But of those respondents who are publishers of secondary analytical treatise materials, only PLI is including older materials on their database, **PLI PLUS**:

We are committed to making previous editions of our content available for legal research through our research database PLI PLUS. We started a digitization project in 2013 which continues today. We have digitized more than 2,000 archival titles published from 1980–2008. We have made this content available and searchable on PLI PLUS.

Bloomberg BNA's historical archive only includes primary materials at this time, noting the following:

Bloomberg Law has federal court opinions going back to the 1700s and state courts to the 1600s. We have versions of the U.S. Code back to 1994 and The Internal Revenue Code back to the 1913 Revenue Act. Users of the U.S. Code and CFR are alerted to prior provisions, with links to prior versions as well as implementing Public Laws and Federal Register documents. We maintain copies of all BNA Law Reports from the point the Law Reports became available on the BNA platform electronically (generally 1996) going forward.

When asked to clarify their response about their secondary materials, Bloomberg BNA indicated that they do not retain previous editions of their BNA treatise titles when new editions are published. However, (from Q3) they will "continue to add new versions of [their] primary source information without removing any previous editions."

Thomson Reuters, answering on behalf of TR Legal U.S. only, indicated that they provide historical content on a very limited and selective basis such as the *American Law Reports*, which are available on Westlaw.

Both LexisNexis and Thomson Reuters make some of their earlier materials available through Overdrive/LexisNexis Digital Library and ProView respectively.

Q2: IF NOT, WILL YOU CONSIDER ADDING A BACK-FILE OF YOUR CONTENT FOR HISTORICAL LEGAL RESEARCH PURPOSES?

As with the first question, the answers varied due to the lack of specification on the part of the survey itself. Some vendors are adding back content of all of their materials (see PLI's answer to Q1), some are committed to adding back content for their primary resources such as Bloomberg BNA, and others already make all of their previous content available.

Thomson Reuters had this to say:

As part of taking care of the primary law corpus of our content, we provide access to portions of our legacy content. We maintain electronic archives of statutory and case law materials, such as US federal laws and US Supreme Court cases, back to the 1790s. We are happy to field questions from researchers as they come up if we can be of assistance.

Bloomberg BNA responded by adding:

We understand the need for historical research. In December 2017, we added proprietary legislative history to select IRC sections going back to 1954. We offer current versions of the state codes and regulations and plan to add 10 or more prior versions per state. Decisions on adding past archives of datasets are made on a case-by-case basis based on client needs and the scope of the project.

Q3: IF YOU ARE NOT ABLE TO ADD A BACK-FILE OF YOUR CONTENT, GOING FORWARD WILL YOU MAKE PREVIOUS EDITIONS AVAILABLE ON YOUR PLATFORM WHEN A NEW EDITION IS PUBLISHED?

This question, for the most part was skipped or found to be redundant, however **Bloomberg BNA** noted: "[Yes.] We will continue to add new versions of our primary source information without removing any previous editions."

While **Thomson Reuters** answered: "Materials published on the ProView platform offer this functionality today, but we cannot guarantee future compatibility with succeeding formats in perpetuity."

Wolters Kluwer suggested they would consider it, but also noted the significant cost to such an undertaking: "Possibly. There's some value for point-in-time research, but the effort to manage and productize these additional assets so that they do not interfere with current editions would not be insignificant."

PRESERVATION QUESTIONS

The answers to the two preservation questions varied somewhat. For easy reference, the full answers are presented below.

Q4: WHAT PRESERVATION PRACTICES DO YOU HAVE IN PLACE TO PROTECT YOUR COMPANY'S BODY OF WORK IN PRINT?

LexisNexis: Although LexisNexis does not maintain a print archive of all LexisNexis proprietary primary/statutory/secondary/analytical publications, LexisNexis maintains an electronic copy of each publication files/releases dating from 2005 forward. LexisNexis also has archived print copies of major works, such as *Collier on Bankruptcy.* LexisNexis also maintains Treatise Masters of all of the proprietary Secondary/Analytical publications, essentially a PDF rendition of the publication. LexisNexis maintains a Treatise Master of the current version of each publication, plus the prior release.

ProQuest: For print, we try to maintain at least one print copy of our historic and government content, but also store electronic copies of our print work in our primary data center.

PLI: In addition to our policy to preserve copies of our current collection, we have been actively working with the library community to acquire past editions of our publications that are not currently in our possession in order to build a comprehensive archive. As we acquire copies of older PLI Press titles, we work to store them either onsite at PLI or offsite in a secure storage facility.

Fastcase: We include all of our print collection in digital format as well, and keep multiple redundant copies of the archive.

Hein: http://heinonline.org/HeinDocs/Archival.pdf

Bloomberg BNA: While not the publisher of record for primary source information, Bloomberg BNA maintains a library of virtually all print issues of our *Law Reports* and print case services going back to 1929.

Our holdings are cataloged and discoverable in OCLC's WorldCat. Our publications are printed on paper that adheres to standards for permanence and durability.

Thomson Reuters: Our print products are created from electronic sources and we have a number of repositories that electronically back up our content.

Wolters Kluwer: We maintain copies in our warehouse. We also keep 5 years of manuscript for each title.

Q5: WHAT PRESERVATION PRACTICES DO YOU HAVE IN PLACE TO PROTECT YOUR COMPANY'S BODY OF WORK DIGITALLY?

LexisNexis: LexisNexis maintains prior releases of LexisNexis proprietary primary/statutory print publications that have been converted to eBook, and are made available via the LexisNexis Digital Library. Those historic versions are only available from the point in time we first converted that publication to digital, forward. For many LexisNexis proprietary primary/statutory print publications, the first conversion date is roughly 2011-2013. We do not have any plans to digitize our print publications retroactively.

ProQuest: For digital historic and government content we have the primary version stored in our online products. Then we have at least one digital backup of our content either in Amazon cloud storage or in local data servers, which reside in a separate data center from our online products. For most of the content we also have the original fiche or film stored at Iron Mountain.

PLI: We make our digital archive available through PLI PLUS and on our internal servers. For data protection, our content is backed up daily and we have an offsite backup location.

Fastcase: We keep multiple redundant copies of the archive, onsite and offsite.

Hein: http://heinonline.org/HeinDocs/Archival.pdf

Bloomberg BNA: As a strong technology company, Bloomberg BNA has robust systems in place to preserve digital information with multiple systems in place to ensure continued access to our data. We also recognize the problem of "link rot" of government resources. Instead of linking to these external documents, we take care to snapshot the documents and host them in Amazon S3 where they remain available should the documents be deleted from an organization's website.

Thomson Reuters: Our products are created from electronic sources and we have a number of repositories that electronically back up our content.

Wolters Kluwer: Digital assets are routinely archived to disk and stored at a 3rd party.

CONCLUSION & TAKEAWAYS

The vendors who chose to participate in this survey did so with enthusiasm and candor and should be commended for their openness and willingness to partner with a concerned library community. This survey demonstrates the need to look more closely at the problem of digital migration: the loss of access to the historical legal publishing record. The future of legal scholarship will be gravely imperiled as we advance toward an increasingly electronic realm if we do not have the forethought to protect legal materials in print, digitally, or in both formats. Access to the legal historical record is compromised, in some cases permanently, when new digital editions replace older editions, when libraries weed and discard print materials, or chose electronic versions over print.

CRIV hopes this will be the first step to continued dialog between librarians and publishers to ensure the protection of legal archives and to discover pathways to solve this problem together. The results of the survey suggest that continued partnership to coordinate efforts is paramount. CRIV will endeavor to engage and partner with legal vendors, our AALL vendor members.

2018 AALL ANNUAL MEETING RECOMMENDED PROGRAMS

The **conference schedule** for the 2018 AALL Annual Meeting has been finalized, and there is a great selection of educational programming available. The CRIV Sheet subcommittee has identified a few programs that we think may be particularly appealing for our readers and have provided additional information below. If you attend any of these programs, or other programs or conferences that may be of interest to your fellow CRIV Sheet readers, please consider writing a synopsis for the CRIV Sheet Summaries, to be included in an upcoming issue. If you're interested, please contact the CRIV Sheet editor, **R. Martin Witt**.

COMMITTEE ON RELATIONS WITH INFORMATION VENDORS (CRIV) VENDOR ROUNDTABLE

> Sunday, July 15
> 1:00 p.m.-2:00 p.m.
> Hilton Key Ballroom 9

This roundtable discussion can often inform CRIV's activities for the upcoming year, so it is a great opportunity to hear from vendors, committee members, and anyone else interested in contributing. Everyone is welcome to attend and listen, or participate if you are so inclined.

GAME DAY! IT'S LIBRARIAN SKILLS VS. ERECORDS TO DEMONSTRATE ROI FOR THE WIN!

> Sunday, July 15
> 2:30 p.m.-3:30 p.m.
> BCC Ballroom II

Demonstrate your library's value by using traditional library practices, such as naming conventions, to tame your organization's electronic records, teach students new tools, and maybe even create a marketable product! Records and Information Management (RIM)—both inside and outside the library's parent organization—is a key part of today's legal landscape. RIM plays a role in eDiscovery, cybersecurity, and public records requests. This session first explains how librarian skills fit into RIM. Then, participants will play games that they can adapt to their organizations' needs to train staff, students, and clients in good RIM practices.

APIS: WHAT THEY ARE AND HOW TO USE THEM

> Sunday, July 15
> 2:30 p.m.-5:00 p.m.
> BCC Room 327-329

Application programming interfaces (APIs) are now standard toolkits for opening up systems and extending their functionality. Library technologist Marshall Breeding has said that the use of APIs is vital for today's library systems, and understanding how to deploy them is a necessary skill. This session will familiarize participants with APIs and include an introduction to the protocols and code that make them work. Examples will show how APIs are currently used in library scenarios to enhance services, connect systems, and extract data.

GIVE ME YOUR KNOWLEDGE!

> Sunday, July 15
> 4:00 p.m.-5:00 p.m.
> BCC Room 324-326

One of the major issues in any organization is the danger of knowledge walking out the door every time someone leaves, whether due to job changes, retirement, or other reasons. Over the past decades, many organizations have undergone hardware and software system changes. One area, however, is often overlooked—the knowledge that exists in people's heads and was never put on paper, the so-called, "tacit knowledge." This program will define tacit knowledge and explore at least three methods to extract and deliver tacit knowledge to future users.

LIBRARY SERVICES FOR COMMUNITIES LIVING IN FEAR

Monday, July 16
10:00 a.m.-11:00 a.m.
BCC Room 337-338

In 2015, our host city, Baltimore, experienced massive protests against police brutality in reaction to the death of 25-year-old Freddie Gray. Some of these protests turned violent, and the despair and frustration of our communities were evident all across the city. Despite the unrest and riots, Enoch Pratt Free Library and its then-CEO, Carla Hayden (our current Librarian of Congress), decided to keep the library open. Similar to Baltimore in 2015, this session will explore library or librarians' initiatives to support DACA (Deferred Action for Childhood Arrivals) students and refugees coming to or already living in this country. Panelists will provide: 1) the library or librarian's personal story; 2) lessons learned; and 3) how best to apply these lessons to all libraries.

DATA MINING FOR MEANING: THE LAW AND CORPUS LINGUISTICS PROJECT

Monday, July 16
10:00 a.m.-11:00 a.m.
BCC Room 339-340

Corpus linguistics is a method used to investigate the meanings of words by analyzing collections of texts. In early 2018, the Brigham Young University (BYU) Law Library plans to launch a Law & Corpus Linguistics interface to enable scholars, judges, and practitioners to better understand and interpret the meaning of words and phrases in legal texts, such as statutes, constitutions, contracts, and even case law. The initial project will include United States Supreme Court opinions (**corpus. byu.edu/scotus**). Learn about the development of this field of study, as well as the details of the BYU project and its successes (or failures) to date.

COMPRESSING AN ELEPHANT: HOW WE SHRUNK ACQUISITIONS AND COLLECTIONS WORKFLOWS

BY DEVELOPING OUR OWN BEST PRACTICES FOR OPERATIONAL EXCELLENCE

Monday, July 16
11:30 a.m.-12:30 p.m.
BCC Room 324-326

Shrinking budgets and staff are nothing new. Much of what we do each day in respect to acquisitions and collection management reflect workflows that were developed with more staff, more time, more money, and very different technology. Is it possible to dig into our current workflows and discover more time and more money?

Come to this session if you are interested in hearing about one academic law library's experience with workflow review in acquisitions and collections. Learn how we worked within our library, with vendors, and with other stakeholders on campus to shrink our workflows, save time and money, and make our library a bit more nimble for those unknowns on the horizon. It wasn't a cakewalk, but we hope you can learn from our mistakes!

OH NO, NOT THIS RENEWAL AGAIN: USING ELECTRONIC RESOURCE MANAGEMENT TO TAKE CONTROL OF YOUR ACQUISITIONS

Monday, July 16
2:00 p.m.-3:00 p.m.
BCC Room 341-342

As library collections continue to shift from print to online, electronic resources management (ERM) has become increasingly important … and complicated, especially when it comes to acquisitions. When an invoice to renew a product arrives in your inbox, do you have the information you need to make decisions and get approval pro-actively, or are you relying on inefficient systems to obtain data and budget costs? Does your staff have the tools and training to handle the e-resource life-cycle, or is nobody taking ownership? Are you able to make informed assessments about resources as the subscriptions come due, or do you find yourself filled with dread and saying, "Oh no, not this renewal again"?

In this session, participants will consider the challenges to creating ERM procedures and learn how to overcome these obstacles using best practices and leveraging technology. Participants will be able to take a model procedure and customize it to their own organizations.

TELLING YOUR STORY: USING METRICS TO DISPLAY YOUR VALUE

Tuesday, July 17
10:00 a.m.-11:00 a.m.
BCC Room 343-344

The American Bar Association, academic institutions, law firms, and governments are demanding more and more outcome-based performance. However, displaying these outcomes is difficult for law libraries. Law libraries possess an abundance of data, but determining which metrics will showcase your law library's value and performance is difficult. Speakers from a law school, law firm, and court library will explain the different metrics they use to display their value to their stakeholders. After these short presentations, a "fishbowl" discussion will provide participants the chance to share and learn about different metrics and tools law libraries are using to best tell their story.

CRIV LIAISONS TO VENDORS

CRIV holds semiannual calls with four legal vendors: Bloomberg BNA, LexisNexis, Thomson Reuters, and Wolters Kluwer. CRIV publishes notes from the calls as they become available both in *The CRIV Sheet* and on the *CRIV Blog*. For this issue, we have notes from recent calls with Bloomberg BNA, LexisNexis, Thomson Reuters, and Wolters Kluwer.

CRIV / BLOOMBERG BNA SEMIANNUAL CALL

KIRSTIN NELSON
LAW LIBRARIAN
USDA NATIONAL AGRICULTURAL LIBRARY

Date: December 7, 2017 / 11:00 a.m. (EDT)

Participants: Mike Bernier (Director of Library Relations, Bloomberg BNA); Kirstin Nelson (CRIV liaison); & Kate Hagan (Executive Director, AALL)

NEW BLOOMBERG BNA PRODUCTS, POLICIES & OTHER ISSUES OF INTEREST

New Branding for Product Lines
Mike Bernier discussed Bloomberg BNA's four key product lines, noting that each is now branded to highlight the topical content. The four product lines are Bloomberg Law, Bloomberg Tax, Bloomberg Government, and Bloomberg Environment. These platforms provide legal, tax, compliance, government affairs, and government contracting professionals with critical information, practical guidance, and workflow solutions.

BNA Law Reports Platform Changes
Mr. Bernier highlighted platform changes to BNA Law Reports that started to launch in October 2017. The new platform allows for real-time updates, rather than a single daily news release. This upgrade gives the platform a newswire feel. Users now have access to more customized alert settings, including time of day for delivery and other filters. The changes were first rolled out with the Environmental & Safety materials, with several notices going out to subscribers before the platform change. The next practice area to see the new platform will be Labor & Employment and Benefits & Compensation Law Reports. Users will have dual access to the old and new platforms for 60-days to allow time to adapt to the changes. The new platform is intended to consolidate BNA news materials into fewer overall titles, but will not reduce the overall coverage. BNA will assign new ISSN numbers and revise MARC records to reflect the changes.

Points of Law
In September 2017, Bloomberg BNA released Points of Law. This tool offers a streamlined option for case law research. Point of Law uses machine learning algorithms to comb court opinions and highlight language critical to a court's reasoning and link this language to a related point of law.

Length-Of-Case Predictive Analytics
Bloomberg BNA's Litigation Analytics tool can now compare how long judges typically take to resolve cases, as well as how long cases take to resolve in specific jurisdictions and across all federal district courts. This new functionality uses docket information to provide predictive analytics to help determine litigation strategy and estimate costs.

Docket Key
In October 2017, Bloomberg BNA introduced Docket Key, a proprietary system that identifies and classifies entries on a docket sheet. The product uses machine learning to target 20 categories, including motions, complaints, notices, briefs, and orders.

Requests for Assistance/Member Advocacy Issues
There were no member requests for assistance received since the last meeting.

Questions/Updates
Ms. Nelson inquired about a timeline for the BNA.com sunset. Bloomberg BNA responded that no date had been set.

CRIV / BLOOMBERG BNA SEMIANNUAL CALL FOLLOW-UP

KIRSTIN NELSON
LAW LIBRARIAN
USDA NATIONAL AGRICULTURAL LIBRARY

Date: March 12, 2018 / 2:00 p.m. (EDT)

Participants: Mike Bernier (Director of Library Relations, Bloomberg BNA); Kirstin Nelson (CRIV liaison); & Rick Montella (Executive VP, Commerical Strategy, Bloomberg BNA)

ADDENDUM
In January 2018, CRIV received a request for assistance from an AALL member seeking an update on the status of the BNA.com platform. In follow-up correspondence with Mike Bernier, a plan to sunset the platform was made after the December 2017 call. CRIV scheduled a follow-up teleconference to gather information. Greg McCaffery, Chief Executive Officer at Bloomberg BNA, released a Customer Communication in early 2018 describing changes to BNA.com that will take place over the remainder of the year.

SUNSET OF BNA.COM
Bloomberg BNA has released a timeline for the sunset of the BNA.com platform. Bloomberg BNA will also decommission numerous print titles, but content will remain electronically available. Access to BNA.com will end as contracts come up for renewal, and subscribers may continue their BNA content by upgrading to Bloomberg Law, Bloomberg Tax, Bloomberg Government, or Bloomberg Environment, or a portion thereof. Most print publications will cease in 2018, and will require a Bloomberg BNA subscription for electronic access. Bloomberg BNA is providing print subscribers five seats to the equivalent electronic content until the end of an existing contract. *Tax Management, Corporate and Healthcare Portfolios* will continue in print but a Bloomberg BNA electronic subscription will be required to receive the *Tax Management* print series only. The *ABA/BNA Lawyers' Manual on Professional Conduct* will continue in print format.

Please direct questions about BNA.com content and contracts to your account representative.

CRIV / LEXISNEXIS SEMIANNUAL CALL

JIM GERNERT
LAW LIBRARIAN
SOCIAL SECURITY ADMINISTRATION

Date: November 28, 2017 / 4:00 p.m. (CDT)

Participants: Kate Hagan (AALL Executive Director); Carolyn Bach (Sr. Manager Librarian Relations); Drew Jones (Product Planning Manager); Teresa Harmon (Sr. Director of Product Planning); & Jim Gernert (CRIV chair)

NEW LEXIS PRODUCTS OF INTEREST

Lexis Advance

Lexis has added a number of enhancements to users' ability to search news files, including options for filtering searches by negative news either pre- or post-search; group files for more refined results; and language filters that let the searcher refine by language.

International Primary Law sources have been added to Lexis Advance so that all of the international primary content that was available on Lexis.com is now available on Lexis Advance, including sources from the EU, Canada, and Malaysia.

In 2018, Patent Content on Lexis Advance will be powered by Total Patent One, and includes full diagrams and visual capabilities and a more robust gateway. However, there is still additional content in Total Patent One that is not included in Lexis Advance.

Full text alerts and custom pages will be available on Lexis Advance in early 2018. Links to custom pages will be available on the main screen of Lexis Advance, and can be shared with other Lexis users in your organization.

Lexis Practice Advisor has been redesigned to enhance the user experience with new navigation by practice area, jurisdiction, and content type. It aligns with the practitioner's workflow with expanded practical guidance content organized along a navigable task tree. Moreover, Practice Advisor now includes a deal document Transactions Search, powered by Intelligize. Lexis Practice Advisor will further be expanding their practice area focus with the addition of Federal Civil Practice and Antitrust in Q1 2018, followed by Private Equity and more planned for the 2nd half of 2018.

AI & Analytics

Ravel and Lex Machina – There is enhanced integration of Lex Machina into Lexis Advance that include analytics for judges, law firms, and attorneys when viewing a case; deeper analytics are available via a link for Lex Machina subscribers; Ravel Law integration will take place throughout 2018. Users should start to see content from Ravel in Lexis Advance by the end of Q1 2018, and Case Law Visualization, information on judges, and additional analytics will be added throughout 2018. Some of the information will be available with an existing Lexis Advance subscription, while the analytics may require a separate subscription.

Lexis Answers – this service leverages AI to deliver on-point answers and results in five areas—Definitions, Elements of a Claim, Doctrines, Standards of Review, and Burden of Proof. Statute of Limitations and Judges will be added to the service in Q1 2018; Lexis Answers is available across multiple jurisdictions.

VENDOR ADVOCACY ISSUES

Some law firm librarians reported that they were not able to purchase Lexis print and ancillary online products if they opted not to renew their Lexis Advance subscriptions. This issue had been raised with Carolyn earlier and a response was provided by Lexis' management, as follows:

"Keep in mind that Lexis has been selling integrated products as a package with Online for many years with notable examples such as Lexis Search Advantage, Lexis for Microsoft Office, Verdict and Settlement Analyzer, Profile Suite, LN Publisher, and Digital Library. As we retire Lexis.com this year, and upgrade users to Lexis Advance, we will more fully leverage our platform that consolidates all content and tools to one ecosystem. This affords considerable benefits to users including being able to

navigate seamlessly between products, have answer sets surfaced across products, and gain access into the central Online content repository, that formerly would have been restricted by product.

Our pricing is different in each market and varies depending on which products and solutions work best for each customer. Accordingly, we sit down with customers and explain the pricing for their firm, including what products are sold together and which are sold separately. If any of your readers want to discuss, we are happy to do so directly with them."

It was felt by AALL/CRIV that the response didn't squarely address the questions that were asked. Carolyn advised she did not have additional information, and Jim and Kate asked her to go back to Lexis' management and try to get answers to these specific questions:

- Will Lexis confirm that they are refusing to sell print and ancillary online products to customers who do not maintain their subscriptions to Lexis Advance?

- If so, what is the rationale behind the policy?
- What markets is this policy being applied in?
- Are there plans to expand the policy to additional markets?
- What are the parameters of the policy (i.e., which Lexis products does it apply to)?

Pricing of Errata?
Does LexisNexis have a policy on the pricing of Errata for their print titles (is it normally provided free of charge)? *LexisNexis does not charge for Erratas for their publications.*

SUNSET DATE FOR LEXIS.COM
Lexis confirmed that the Lexis.com platform is on schedule to end service in all markets at the end of 2017.

Note: For a brief promotional period, users will have all patent authorities available in Total Patent One. After the promotional period, users will be limited to the same patent authorities they had access to in lexis.com

CRIV / THOMSON REUTERS BIANNUAL CALL

CAROLINE WALTERS
COLLECTION DEVELOPMENT LIBRARIAN/ U.S. & MATERIALS BUDGET
HARVARD LAW SCHOOL LIBRARY

Date: Wednesday, June 28, 2017

Participants: Kate Hagan (AALL); Lori Hedstrom (National Manager, Thomson Reuters Librarian Relations); & Caroline Walters (CRIV liaison)

SCHEDULING CONCERN
To address a member's concern about the scheduling of editions for Wright and Miller's Federal Practice and Procedure, Lori Hedstrom had a lengthy interview with the editor of that publication to get background and history. The issue regards a recent decision to publish the newly revised Vol. 30B as 1st edition. For many years it had been published as a hardbound interim edition. Yet older editions within the Evidence Unit were labeled 1st editions in the 70s and 2nd editions were published in 2005. The timing of the new 1st edition Vol. 30B, published in 2017, was therefore confusing to catalogers and serials inventory. This is what Lori learned in order to illuminate and explain the irregular publishing schedules for Wright and Miller:

Unlike other West publications, Wright & Miller is primarily written by the work of outside authors, specialists in their areas of interest. Material within the set is updated as needed when the law evolves and when a subject specialist contributes new scholarship. This is why individual volumes within Wright & Miller have, for quite some time, taken divergent paths as far as how often they are revised between one edition to the next.

With respect to volume 30B's recent publication as a 1st Edition, until recently, the subject of this volume (the hearsay rules) were not covered in Wright & Miller by an independent author. While an original analysis of the hearsay rules was being written by Wright & Miller's original authors, this subject was covered within the treatise by material that was largely copied from the Handbook of Federal Evidence. The volumes that contained this material were labeled as "interim" editions for many years. Recently, a new author was retained to independently research and create a wholly original analysis of the hearsay rules, for which a new chapter was created

within the treatise. This is why the new Vol. 30B, which replaces the last of Wright & Miller's "interim" editions, is labeled as a 1st edition.

THOMSON REUTERS LISTENING SESSION IN BOSTON

This fall, Thomson Reuters agreed to send high-level executives to meet with a group of Boston-area Acquisitions Librarians, a representation of both academic and firm libraries, to discuss billing problems and other customer service issues and concerns. It was a very productive meeting and a first step toward meaningful change. During our call, Lori offered to summarize the meeting for CRIV, which will then be published with a wider audience. She hopes to schedule follow-up meetings with this same group to report their progress and get feedback for further development. A separate blog post will follow detailing the results of this meeting.

　　*View the separate blog post.

CRIV / WOLTERS KLUWER SEMIANNUAL CALL

C.J. PIPINS
RESEARCH AND ACADEMIC TECHNOLOGY LIBRARIAN
UNIVERSITY OF MARYLAND, THURGOOD MARSHALL LAW LIBRARY

Date: November 27, 2017 / 2:00 p.m. (CDT)

Participants: C.J. Pipins; Kate Hagan; & Chris Pamboukes

OUTSTANDING REQUESTS FOR ADVOCACY - NONE

AALL PROGRAMS, ACTIVITIES, OR BUSINESS OF INTEREST TO WK

- Getting ready for the AALL Annual Meeting in Baltimore next July. The AALL Annual Meeting program committee met and selected programs for 2018. Kate Hagan will be in contact with marketing folks at WK to discuss their activities at the meeting in late November.
- There will be a CRIV roundtable at the AALL Annual Meeting in Baltimore. More details are forthcoming.
- AALL is working on a survey to determine the State of the Profession. A group of AALL members from diverse library types is developing a survey to look at trends, challenges, and benchmarking that will be of value to our members when assessing their libraries and what they should be looking at to move their libraries forward. The hope is that it will be completed by next fall.
- Wolters Kluwer should continue to send anything newsworthy, such as product release, etc., to the AALL daily newsletter KnowItA-ALL for distribution to AALL members. WK would like any current awareness sources from AALL.

WK PROGRAMS, ACTIVITIES, OR BUSINESS OF INTEREST TO CRIV AND/OR AALL

WK is sunsetting Intelliconnect. The Tax and Accounting platform, which looks similar to Intelliconnect, will NOT be sunsetting. They will retain their tax content on that platform and that info will be mirrored on cheetah.

Recently, WK extended the Standard Federal Tax Reporter historical content. Wolters Kluwer partnered with Hein to provide archives of materials from 1917-1985. Content includes the Internal Revenue Code, IRS publications, and the tax regulations.

The research folders from Intelliconnect have been renamed "worklists" for the cheetah platform. Thanks to a recent enhancement, users who do not access Cheetah through an IP range can now share and transfer ownership of worklists to others on the same account. Also, any user can go in and change their password; they no longer have to contact their account representative to get it changed.

WK is doing lots of academic training right now, and receiving good feedback about cheetah. They are still migrating a lot of premium accounts.

TRAINING & SUPPORT SITE FOR CHEETAH

WK has also started focusing on **more outreach to**

law students in addition to librarians. There are many ways to deliver law student training. Schools interested in exploring the training options should contact Chris or their Wolters Kluwer account representative.

- ID manager 2.0 – For accounts that do not access Cheetah through an IP range, ID Manager 2.0 is a free service from WK where a librarian who is the site contact can manage their account's user IDs. The site contact can also go into an individual's accounts in their organization to customize that individual's cheetah experience. This is really a back-end tool to customize someone's homepage on cheetah to highlight certain content for that person. ID manager also allows the site contact to create user IDs for individuals. To access it click **ID Manager 2.0**.

- WK has cheetah widgets that provide functionality that was not previously available. You can search in a cheetah widget on your platform and you can embed the widget on a SharePoint page. This allows you to get access to WK publications from right there. The widget is free and does not require the user to log in. Widgets can help surface content for which users don't normally search or don't know exists. Anyone with a username and password can make a widget. **Check it out here**.

- For a while now, there have been quick start cards to help users quickly see and understand the features available with a WK product. Now there are content specific quick start cards available on the training and support website. Users can also access training videos there as well. Under specialized training there is also a legal pro virtual training option that specializes in one on one training with a person. Users can get a single WK-trainer who will spend 30 minutes to an hour with you. This feature is called Legal Pro Virtual Training. There are lots of options for choosing date/time. Does not count against your contracted hours of training and support time. **Legal Pro Virtual Training**.

AALL

/ YOUR LEGAL
  KNOWLEDGE
  NETWORK™

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