

THE CRIV SHEET

THE NEWSLETTER OF THE COMMITTEE ON RELATIONS
WITH INFORMATION VENDORS

VOLUME 41, NO. 1 / NOVEMBER 2018





**Committee on Relations with Information
Vendors (CRIV) Members**

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R. MARTIN WITT

HEAD OF PUBLIC SERVICES
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The CRIV Sheet

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Welcome back to *The CRIV Sheet*, and thank you for joining me as we kick off Volume 41! I'm looking forward to serving as *The CRIV Sheet* editor for a second year, ably assisted by *The CRIV Sheet* subcommittee, consisting of our CRIV Chair C.J. Pipins, along with Karen Grushka, Deborah L. Heller, Matt Timko, and Caroline Walters.

This first issue highlights some of the great programming that took place at the 2018 AALL Annual Meeting in Baltimore, Maryland. We have *CRIV Sheet* Summaries from five of the outstanding programs that were previews in the May 2018 issue of *The CRIV Sheet*. Each of the Summaries also includes a link in the title to the relevant [AALL2go](#) entry, and we encourage you to take the time to view the materials and recordings from the Annual Meeting if something catches your interest.

In Volume 41, Issue 1, we also have the CRIV Liaisons to Vendors semiannual call notes. This issue, we have notes from calls with Bloomberg BNA, Thomson Reuters, and Wolters Kluwer. These calls took place over the summer, and have already been included on the *CRIV Blog* as well. They are reproduced here in *The CRIV Sheet* so they are easily accessible together in a lasting format. The most recent LexisNexis call notes will be included in the next issue of *The CRIV Sheet*.

Moving forward, we will continue producing *CRIV Sheet* Summaries from relevant conferences and semiannual call notes, and we are also very interested in other material. If you would like to write an article for *The CRIV Sheet*, please feel free to email me at rwitt@law.columbia.edu. All ideas are welcome, whether they are for stand-alone articles, recurring columns, or something else entirely. There are no strict page requirements or limits, so take advantage of that flexibility and write that article you've always been meaning to put together.

Your comments and suggestions are always appreciated, and with your help, I know we can continue to make *The CRIV Sheet* the best it can possibly be.

FROM THE CHAIR

C.J. PIPINS

RESEARCH & ACADEMIC TECHNOLOGIES LIBRARIAN
UNIVERSITY OF MARYLAND FRANCIS KING CAREY SCHOOL OF
LAW

Welcome to the first issue of volume 41 (2018-2019) of *The CRIV Sheet*!

We are incredibly fortunate to have R. Martin Witt continuing as editor of *The CRIV Sheet*. *The CRIV Sheet* subcommittee members joining Marty this year are: [Karen Grushka](#), [Deborah L. Heller](#), [Matt Timko](#), and [Caroline Walters](#).

I anticipate a very busy year for *The CRIV Sheet*, and I'm sure each issue will be full of relevant articles written by new authors, reviews of programs and conferences, and timely updates as we work with our vendor colleagues to address concerns from AALL members. This issue of *The CRIV Sheet* features many interesting items, including program reviews from the recent AALL Annual Meeting in Baltimore, as well as some outstanding vendor relations reports.

In between issues of *The CRIV Sheet*, I encourage you to check the [CRIV Blog](#), which has a new manager this year. Karen Provost, law librarian at Fried Frank, LLC in New York City, will be managing the *CRIV Blog* for us, and we will provide readers with several posts per month. AALL members from all types of libraries will no doubt find something of interest on a regular basis. You can also keep an eye out for a mention of our posts in AALL's daily KnowItAALL message, if you receive that email each day. Please keep both *The CRIV Sheet* and *CRIV Blog* in mind over the coming year to stay apprised of our progress on issues related to information vendors that affect all of our libraries.

CRIV and the AALL Executive Board are still hard at work addressing many ongoing vendor relations issues with our vendor colleagues. Meanwhile, the committee also receives several new requests for advocacy each month. Please contact CRIV with any vendor-related issues or problems that are of concern to your library. There is a link to the Members' Request for Assistance form on [AALL's Vendor Relations page](#) (along with other helpful information). You do not have to be identified to the vendor, and a CRIV member will contact an appropriate staff member at any of the publishers to bring attention to your issues or concerns, and report back as necessary.

CRIV Blog
crivblog.com

Karen Provost
COORDINATOR

Vendor Roundtable

Pablo Arredondo
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C.J. Pipins
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Vendor Liaisons

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Wolters Kluwer



CRIV SHEET SUMMARIES: AALL 2018 ANNUAL MEETING EDUCATION PROGRAMS

The 11th Annual Meeting & Conference of the American Association of Law Libraries was held in Baltimore, Maryland, from July 12 to July 13, 2018. The theme of the 2018 conference was From Knowledge to Action. In Volume 40, No. 3 of *The CRIV Sheet* (May 2018), CRIV was happy to offer some recommended programs for this conference. In this issue, we follow up with program reviews from five of those recommended programs as part of our *CRIV Sheet* Summaries.

GIVE ME YOUR KNOWLEDGE!

DEBORAH L. HELLER

ENVIRONMENTAL LAW LIBRARIAN
ELISABETH HAUB SCHOOL OF LAW AT PACE UNIVERSITY

Speakers: Saskia Mehlhorn (Norton Rose Fulbright US LLP) & Connie Crosby (Crosby Group Consulting)

This program was all about taking steps to ensure that you do not lose knowledge when someone leaves a job or retires. The speakers focused mainly on law firm libraries and the transfer of knowledge from partners and other attorneys; however, the same principles can apply to any work setting, including an academic law library or a court law library. The expected takeaways from the program included the ability to facilitate knowledge transfers, and to organize and distribute the transferred knowledge to ensure that it is available for all to use in the future. The session was organized into three parts.


First, there was an introduction where both speakers introduced themselves and discussed a program from the previous AALL Annual Meeting, which was meant to be a good companion to this session. As someone who missed the meeting last year, I did not feel that I missed anything by only attending this session; it certainly stood on its own. As part of the introduction, Mehlhorn defined knowledge management as getting the right information to the right people at the right time. The right information was defined as who we know, what we know, and how do we do something.

Second, the speakers discussed the types of knowledge that exist. This involved the difference between

explicit knowledge and tacit knowledge. Explicit knowledge is knowledge that is documented, such as forms, letters, presentations, client lists, etc. Tacit knowledge is knowledge that is in our hands such as in-house training, mentoring, practice groups, after action briefing, and social networks. The important message of the session was that we need to ensure that we document tacit knowledge and make it explicit so that it can be shared among everyone and not lost when someone leaves.

The third, and largest, portion of the session dealt with knowledge transfer. As Mehlhorn explained, knowledge transfer is not just watercooler talk; it is a systematic and purposeful strategy for capturing critical knowledge from key personnel to store and share within an organization for maximum efficiency. One of the important steps to take is to incorporate the process of knowledge transfer into your organization as people become confident in a role, rather than waiting for people to prepare to leave before tackling the process. For the knowledge transfer process, it is important to set clear goals and to identify the key positions, people, extraction methods, and method of dissemination.

With knowledge transfer, it is best to begin by identifying who you need information from. At the



beginning of the process you will have to weigh who is more important since it is impossible to get all of the information from everyone at the same time. In addition to deciding who to talk to, make sure that you consider what kind of information you are looking for from that person. Once a person is identified, you should think about the best method to capture the important knowledge from that person. An idea suggested during the program was to tape record the session and then transcribe the recording. One important element is making sure that you quickly execute whatever plan of action you have and not to wait too long. Even while you are in the middle of executing your knowledge transfer plan, you should be open to rethinking whether you are using the best method or if a change is needed. During the execution of the knowledge transfer process, make sure that you share the plan since more than one person can help.

Crosby gave some examples and also discussed two case studies. First, she provided the example of a law firm that she worked with that had a partner retiring. The firm decided that the information needed from the partner was information on the clients rather than information on how to handle cases, which the firm already had. She also pointed out that you often need

to be careful in knowledge transfer projects, because some employees can view writing down procedures as a sign that a position will be eliminated; therefore, there needs to be a balance between getting necessary information and alleviating any concerns.

The first case study discussed involved Kraft Foods. Kraft wanted to document how they made their products since their workforce was aging. Kraft heard about the MASK process used in many Francophone countries and decided to use it. The MASK process takes three months to create one knowledge book. It involves scoping, knowledge conversations, repeating knowledge conversations as needed, integrating relevant documents, pulling it all together into some kind of documentation, validation, and finally sharing. The other case study involved Hydro Ottawa, which is a power company. Since there was an entire missing generation of workers, the company decided to start a program that would identify leaders early in their careers and target those candidates with extensive training and on-the-job action learning.

The program ended with a short question and answer period during which several people shared their knowledge transfer experiences and asked questions about the process.

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

KAREN PROVOST

ELECTRONIC SERVICES MANAGER
FRIED, FRANK, HARRIS, SHRIVER & JACOBSON LLP

Coordinator/Moderator: Anna Forsher, HBR Consulting

Speakers: Stacy Pangilinan (DLA Piper) & Constance Ard (Hogan Lovells)

Most law firm libraries have dramatically shifted from print to online in the past 10 years, leaving electronic resource management (ERM) increasingly important. When an invoice or renewal comes into your library, do you have the information you need to make decisions and get the approval proactively? Are you able to make

informed assessments about resources as the subscriptions come due? This program discussed how to take a model ERM procedure and customize it to fit your organization.

The first speaker, Stacy Pangilinan, spoke about her experience at DLA Piper when three firms were



merged into one. It was a very complicated and time-consuming process to identify all of the print and online subscriptions and how they were going to move forward. It took a full year just to identify all of the resources! With each resource, they designed a form in SharePoint to capture information about the renewal, including the costs, usage, uniqueness or need, and who approved the initial purchase. The form grew over the years to include notes on renewal negotiations and the percent of increase or decrease in cost. These forms are invaluable at renewal time to quickly see all the information you need in one report. DLA uses an application called Zoho to track deskbook spending and an application called SpendConnect for contracts, which provides resource renewal analysis, statistics on new resources, and potential cancellations.

Anna Forsher spoke about practice groups and getting them involved at renewal time as well. Practice group-specific budget spreadsheets that show usage, detailed cost history (including cost per user or cost per session), notes on the resource, and prior approvals

should be provided once a year. She indicated that you should not wait to be asked by a practice group head about their resources; it is important to always have this information ready. Forsher said it is also important to leverage invaluable resource monitoring tools such as Research Monitor or OneLog, understand each practice group's spending, help them understand their costs, and centralize all content review and accountability.

The last speaker, Constance Ard from Hogan Lovells, already had a process in place, but needed to improve and streamline it (Hogan is a large firm with 47 offices globally in 24 countries). They needed to develop standardized forms for new purchases and renewals to help with the management of more than 300 suppliers and contracts. Their goal is to create standards and models for automation, checklists, standardization, and globalization.

This was a very informative program that provided some great ideas for incorporating more detail into each subscription record.

DATA MINING FOR MEANING: THE LAW AND CORPUS LINGUISTICS PROJECT

PABLO ARREDONDO


CHIEF OF LEGAL RESEARCH
CASETEXT

Moderator: Karen Selden, University of Colorado

Speakers: Shawn Nevers (Brigham Young University); David Armond (Brigham Young University) & Shane Marmion (HeinOnline)

Although Artificial Intelligence (AI) eats up a lot of the hype, there is plenty of fascinating data science and legal informatics happening outside of the AI umbrella. One great example is the work presented at the AALL Annual Meeting on a panel entitled "Data Mining for Meaning: The Law and Corpus Linguistics Project." The panel discussion centered on a Law & Corpus Linguistics project based at Brigham Young University (BYU).

The fact that BYU would be heavily represented at a session on corpus linguistics is no coincidence. BYU has long been at the forefront of the expanding field of legal corpus linguistics. In 2010, the *BYU Law Review* published a note by Stephen Mouritsen, entitled "**The Dictionary is Not a Fortress: Definitional Fallacies and a Corpus-Based Approach to Plain Meaning.**" Corpus linguistics, Mouritsen



wrote, “[i]n general terms... may be thought of as a linguistic methodology that analyzes language function and use by means of an electronic database called a corpus.” In 2013, BYU became the first law school to offer a course on corpus linguistics, and in 2016, the university hosted an inaugural conference on the subject.

Nevers framed his remarks in terms of a real case, *Muscarello v. United States*, 524 U.S. 125 (1998), which faced the question of whether a statutory phrase—“carries a firearm”—should be interpreted to include keeping a firearm in the glove compartment of a car. Nevers discussed limitations of traditional approaches to answering questions of a word/phrase’s meaning such as dictionaries, etymology (fun fact, December originally referred to the 10th month of the year), and database keyword queries. Nevers contrasted these traditional methods with the corpus linguistics approach, specifically with what Mouritsen found when he analyzed the “carries a firearm” question through holistic analysis of corpus for more than 560 million words of text spanning fiction, popular magazines, newspapers, and academic texts (the Corpus of Contemporary American English). Overwhelmingly in this corpus, the use of

“carry” in relation to a firearm referred to carrying on a person. The data Nevers showed was compelling and the power of corpus linguistics was palpable.

David Armond spoke about the heavy lifting needed to create the resources that power corpus linguistics. This includes, not surprisingly, the creation of, corpora itself including the BYU Law Corpus (COFEA). Aside from assembling the documents and getting them into data science-friendly format, Armond and his colleagues at BYU faced the challenge of balancing public access with copyright protection. Critical to BYU’s efforts was a partnership with HeinOnline, which allowed access to their extensive content collection; not all publishers were as willing to support this important work.

This discussion included multiple perspectives on this growing sector of interest; the field of corpus linguistics, however, has grown far beyond what could be discussed in a singular panel. Anything resembling a thorough discussion of this approach to law requires information from multiple perspectives and sources, beyond just this piece. The reader is strongly encouraged to explore the topic further, including visiting [BYU’s Law & Corpus Linguistics project](#) directly.

COMPRESSING AN ELEPHANT: HOW WE SHRUNK ACQUISITIONS AND COLLECTIONS WORKFLOWS BY DEVELOPING OUR OWN BEST PRACTICES FOR OPERATIONAL EXCELLENCE

CAROLINE WALTERS

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

Speakers: Theodora Belniak (SUNY at Buffalo); Elisabeth Umpleby (UCONN School of Law) & Lisa Scholl (SUNY at Buffalo)

This program focused on the experiences of two librarians who tackled outdated and unsustainable workflows in order to accommodate the growing realities of dwindling staff and budgets. Their quest: “Is it possible to discover more time and money?”

The first order of business in this process was to take a survey of current practices. Upon examination, some inefficiencies were found and it was determined that the path of a book acquisition was unnecessarily complicated, passing through too many points of



decision-making (determining priority, pricing, which vendor to use, etc.) along its way to the shelf.

By examining this overly intricate process, they found—after careful planning—an easier and more straightforward path by switching to a Purchase-on-Demand (POD) model through Interlibrary Loan (ILL) requests. In order to do this, they first met with their access services team to improve monographic delivery requests and to fold the POD model into their workflow. Acquisitions staff flagged items for Circulation staff that had been ordered through ILL. In turn, Circulation staff developed a tracking system for requests.

Next, they reviewed all package plans and deposit accounts and canceled nearly all of them. This was accomplished with little complaint. Their new streamlined POD model also eliminated the need to comb through catalogs, thereby saving staff time. Other considerations put into place included engaging vendors with fast fulfillment rates regardless of pricing (spending staff time looking for the least expensive pricing was not a good use of time) and setting parameters on ILLiad to ensure the purchase of materials published within the last five years.

The final results were mapped to a database to track monographic purchasing, to follow patron types and requests, and to use that data to demonstrate the library's support for teaching and research. The information was granular and showed data over the

course of a few years. It also proved useful to Circulation staff that could now see which requests had been ordered, cutting down on the back-and-forth communication between staff members.

The next point during the program related to invoicing problems. The problem of managing the daily onslaught of paper invoicing—invoices that were addressed to multiple people; invoices that did not have purchase order numbers; or invoices with multiple accounts associated with the vendors—was overwhelming and inefficient. In order to get control of this problem they began by sending each vendor a form letter and tracked their communication on a Google doc.

Next, they tackled the cleanup in their integrated library system by reviewing vendor codes, vendor contact information, closing old open orders, and finally providing the vendors with updated purchase order numbers and proper mailing addresses. This was a massive undertaking, but they decided if they were going to do this, they were going to do it right!

The program ended with an enthusiastic question-and-answer period. Audience members were sympathetic to the speakers' plight, as we have all faced declining staff and budgets. Their journey showed that with some thoughtful planning and collaborators, reviewing old workflows to develop leaner and simplified workflows—while time-consuming at first—is well worth the effort.

TELLING YOUR STORY: USING METRICS TO DISPLAY YOUR VALUE


KAREN GRUSHKA

KNOWLEDGE SERVICES SPECIALIST
PROSKAUER ROSE LLP

Speakers: Steve Lastres (Debevoise & Plimpton LLP); TJ Striepe (University of Georgia School of Law) & Joy Shoemaker (Ninth Circuit Library)

The use of metrics in libraries has become an important tool for evaluating resources and demonstrating a library's value within an organization. "Telling your

Story: Using Metrics to Display Your Value," explored the use of metrics in three different types of libraries: law firm, academic, and court.



Steve Lastres, director of knowledge management services at Debevoise & Plimpton, started by discussing four important elements to collecting data: 1) identifying; 2) prioritizing; 3) tracking; and 4) communicating, with the last being the most challenging. Lastres emphasized the value that metrics can play within an institution to, for example, validate and support an organization's business initiatives, measure know-how and research services, and help keep an operating budget in check. Lastres and his team use metrics to support practice areas, demonstrate the value of library staff, measure the use of research services and staff productivity, collect usage information, negotiate contracts, push training and professional development, and identify which resources are the most popular. After collecting and synthesizing the data, Lastres and his team communicate their findings both formally and informally through graphical reports that they circulate to the entire firm, as well as an annual report to highlight the library's worth.

TJ Striepe, associate director for research services at the University of Georgia, spoke next. He identified two types of metrics that his library focuses on: external/stakeholder versus internal. Striepe discussed the importance of collecting metrics that demonstrate an organization's marketability to different stakeholders. Part of that decision mandates aligning with your institution's message and strategic plan. Striepe provided examples of some of the data that he and his team collect: quantitative data (e.g., the number of published articles with which the library has helped, hours spent, and the number of students in advanced research/technology classes), as well as qualitative data (e.g., personal stories from graduates in the workplace about the library's role in preparing them for practice). After identifying and collecting data (using ALLStAR, Microsoft Excel, and LibAnswers), Striepe's team communicates this information both formally (through infographics, newsletters, and annual reports) and informally (having stories and anecdotes ready to share).

Finally, Joy Shoemaker, branch librarian for the Ninth Circuit Court of Appeals, discussed the challenges of demonstrating the library's value and synthesizing and presenting, rather than just collecting, data. Like Lastres and Striepe, Shoemaker noted how critical it is to align the collected data with her organization's strategic plan. For Shoemaker and her team, coordinating and consolidating data proved challenging across the various court branches, each of which has separate access to resources. In response, they came up with working groups across the branches to be responsible for collecting metrics. While the process was not always smooth (e.g., some groups collected nothing or let the project peter out), they were able to set up a testing phase (making sure the library was collecting the right types of data), interpret the results, make adjustments, and then pilot the program across the circuit. Shoemaker said that the lesson learned from this project is to not fear collecting data; just because an organization collects metrics does not mean that it has to share that information with stakeholders. Identifying the correct types of data (in this case, reference questions, print use, training sessions, and acquisitions) is key to making informed decisions. Shoemaker also discussed tools that can be used to collect the data, such as Drupal, Sharepoint, or even just Microsoft Excel.



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 a recent meeting with Bloomberg BNA and calls with Thomson Reuters and Wolters Kluwer.

CRIV / BLOOMBERG BNA SEMIANNUAL MEETING

KIRSTIN NELSON

LAW LIBRARIAN

USDA NATIONAL AGRICULTURAL LIBRARY

Date: July 16, 2018 / 11:30 a.m. (EDT)

Participants: Kirstin Nelson (CRIV liaison); R. Martin Witt (CRIV liaison); C.J. Pipins, (CRIV Chair); Mary Jenkins (AALL Executive Board Liaison); Joe Breda (President, Bloomberg Law, Bloomberg BNA); Rick Montella (Executive Vice President, Commercial Strategy, Bloomberg BNA) & Mike Bernier (Director of Library Relations, Bloomberg BNA)

NEW BLOOMBERG BNA PRODUCTS, POLICIES & OTHER ISSUES OF INTEREST

Bloomberg Law News

The upgrade of *Bloomberg BNA Law Reports* to the news platform is about three-quarters complete. The enhanced news products feature real-time delivery, custom alerts, a better mobile experience, and more. Users can now read three full news stories on a mobile device without entering login credentials. News content moved to the new platform includes Labor & Employment and Benefits & Executive Compensation, Intellectual Property and Tech & Telecom, and Litigation and Bankruptcy Law Reports. Some publications have been renamed.

Key title changes as of July are:

- Bankruptcy Law News replaces Bankruptcy Law Reporter
- Class Action Litigation News replaces Class Action Litigation Report
- White Collar & Criminal Law News replaces Criminal Law Reporter and White Collar Crime Report
- Product Liability & Toxics Law News replaces

Product Safety & Liability Reporter and Toxics Law Reporter

- E-Discovery & Legal Tech News replaces Digital Discovery & E-Evidence, and
- Product Liability & Toxic Law News replaces Expert Evidence Report

More changes are expected throughout the year with regular communications to customers about the changes.

Technology

Bloomberg Law continues to focus on the development of data analytics tools. Last year, Docket Key was released, a tool that uses machine learning to classify underlying filings. Earlier this year, Bloomberg released Health Care Fraud Analytics, which enables subscribers to search and filter healthcare fraud settlement agreements by court, entity, allegation, and date. More recently, SEC Administrative Law Judge Enforcement Analytics was launched. This tool examines trends and outcomes of SEC regulatory actions. Bloomberg Law plans to enhance existing content and release new data analytics tools in the future.

New Partnership with John Wiley & Sons

In February 2018, Bloomberg Law announced a new alliance with John Wiley & Sons. The partnership added more than 60 titles covering a variety of legal practice topics, including corporate, IP, privacy, and cybersecurity.

Litigation Intelligence Center

Bloomberg Law recently introduced the Litigation Intelligence Center. The Center provides access to dockets and underlying documents, Docket Key, and docket alerts for tracking and business development. The Center uses Points of Law, an AI tool that decreases research time and quickly identifies appropriate language to strengthen legal arguments for case law research. The case law research function includes access to BCite, Bloomberg Law's citator. Litigation Analytics is included to provide analysis and information on law firms, judges, and companies.

Requests for Assistance/Member Advocacy Issues

There were 10 formal requests for member advocacy filed with AALL. There were additional requests submitted to the CRIV committee. All requests for member advocacy focused on three main issues.

1. **Discontinuing print titles for existing subscribers.** Bloomberg BNA is moving toward digital-only publishing. This decision is grounded in the reality that more and more libraries are moving away from subscribing to print titles. Bloomberg BNA stopped selling print titles to new subscribers over two years ago and is now moving existing subscribers to the same electronic-only access model. Three publications will continue in print: Tax Management Portfolios (TMP) and Corporate Practice Series (CPS) will continue in print until a TBD date. No print sunset has been determined at this time. Subscribers will be notified in advance when an end date is determined. The ABA/BNA Manual of Professional Conduct will continue in print for

the foreseeable future. BNA Books will continue in print and are not impacted by this policy.

2. **Requiring a Bloomberg Law subscription for continued access to print Tax Management Portfolios.** As accounts come up for renewal, libraries that wish to continue to receive the print version of TMP must license one or more seats to Bloomberg Law. Libraries that prefer electronic-access only are not required to continue a print subscription. Libraries also have the option to subscribe to Bloomberg Law: Tax and other Bloomberg BNA publications currently for sale on a designated-user license, as opposed to the entire Bloomberg Law platform. Bloomberg Law: Tax includes access to the Tax Management Portfolios. A standalone patron access terminal for just the Tax Management Portfolios is not available. The Patron Access Terminals have access to all of Bloomberg Law.

For libraries that provide public access in state, public, and government libraries, a Patron Access electronic license to the full Bloomberg platform is required. Libraries have the option to pay the additional cost to keep TMP or CPS in print until they cease publication. Patron access must be provided at a single-user access point and is priced at \$13,390 per seat. Some libraries may require multiple seats with the number determined during the renewal process.

3. **The cost and number of seats required to subscribe to or renew Bloomberg Law.** For accounts that do not need to provide public access, there are a variety of subscription options. Subscribers can license the full Bloomberg Law platform, which contains all available content, or select segments based on specific areas of law. The list of products can be found on the Bloomberg Law website. A sales representative will determine whether individual or practice group level licenses are required. This is determined by a range of factors such as size of firm, size of practice

group, and additional metrics. To review options, contact your Bloomberg Law sales representative.

The meeting ended at approximately 12:30 pm.

CRIV / THOMSON REUTERS SPRING CALL

Date: June 12, 2018

Participants: Lea Harpster (Thomson Reuters), Kendel Kirk (Thomson Reuters), Lori Hedstrom (Thomson Reuters), Kate Hagen (AALL) & Caroline Walters (CRIV liaison)

This call was primarily dedicated to the ongoing work and collaboration between Thomson Reuters/West and a group of Boston Acquisitions Librarians that began in November 2017. The original intent was to organize a “Listening Session” to hear a list of concerns regarding billing and other customer relations issues. The notes from that original meeting can be found [here](#).

Since the initial meeting in November, the two groups have met twice to fine-tune solutions. Thomson Reuters sent a survey to more than 100,000 customers to get input on how Thomson Reuters can better describe product descriptions on their documents. Approximately 300 customers completed the survey. With the direction of the original Listening Session librarians and the results of the survey, the following enhancements and improvements in billing are currently underway:

- **Product Description:** All titles will be listed on invoices as they appear on the title page. While abbreviations and eliminations of portions of titles will be needed, as some titles exceed the 120 character field available, those changes and the abbreviations will be kept to a minimum and, in consultation with librarians, will be standardized and consistent.
 - Timing: Customers should start to see this change in their mid-August invoices with the changes being rolled out based upon publishing schedules, with the focus on codes products first.
- **Refund Check Documentation:** Improved descriptions on refund checks.
 - Timing: Implemented in March 2018, but will

explore additional presentation improvements in the next phases.

- **My Account Training:** Enhance Customer Training on My Account.
 - Timing: Shared librarian relations contacts to customer group in February follow-up session. Hosting a “My Account” booth at AALL in Baltimore.
- **Credit Memos:** Improving credit memo descriptions.
 - Timing: Expected to be available in Q4.
- **Invoicing Prior to Shipment, Followed by Collection Calls:** Thomson Reuters is currently seeking examples of this problem.
 - Timing: TBD
- **Improve Descriptions on Account Statements:** Account statements being modified to be more descriptive.
 - Timing: TBD
- **Add PO’s on the Invoice at Line Item Level:** A new process to add PO’s at an invoice level has been identified and is in queue for determining system changes needed and prioritization.
 - Timing: TBD
- **Tax on Invoices When Account is Exempt:** Implementing monthly audit process including review of tax exempt status.
 - Timing: New audit process began in June.

Abbreviations that will be implemented consistently:

- Postal code for State Name
- Anno = Annotated
- Consol = Consolidated
- PP = Pocket Part
- Supp Pam = Cumulative Supplementary Pamphlet
- Bk = Book
- Sec = Section / Secs = Sections
- Rev = Revised
- Vol. = Volume
- Sub = subscription

Abbreviations that will be implemented only on an as needed basis:

- Prof = Professional
- Vol = Volunteer
- Unif = Uniform
- Proc = Procedure
- DR = Disciplinary Rule
- Govt = Government
- Resp = Responsibility
- Alt = Alternative
- Admin = Administrative
- Stat = Statute

Next Steps

Thomson Reuters has received input on the abbreviations and guiding principles for the product description changes from two sets of customer groups:

- Additional titles are being reviewed for any added needs for abbreviations.
- Product Descriptions will be implemented with a new process involving both TR editorial and manufacturing teams.
- Customers will proactively communicate that the description changes will be coming
- Updated description changes will occur based on publication schedules focusing on code products first
- Post abbreviation and guiding principles on My Account
- Thomson Reuters would welcome input from customers on the effectiveness of changes post launch.

Other Issues

Another topic for discussion ensued after the spring call. A member was concerned that they would not be allowed to purchase ProView eBooks if they were not Westlaw subscribers. Below is their response:

“Thomson Reuters recognizes the needs of some customers who want eBook functionality without having Westlaw. In cases where a customer is a non-Westlaw customer, they can get ProView eBooks on a per-seat license basis. The customers’ client managers can work directly with the TR ProView team on solutions.”

CRIV / WOLTERS KLUWER SEMIANNUAL CALL

Dates: May 30 & July 6, 2018

Participants: C.J. Pipins, Jenna Ellis, Jim Gernert & Chris Pamboukes

Agenda

Welcome:

- **Preservation Survey** – As a team they saw and answered the questions.

Outstanding Requests for Advocacy

- Treatises – New Editions of looseleaf treatises are arriving without binders. Chris spoke to their technical training manager. You should get complimentary

new binders with the new edition. Just call the customer care division of WK at 1.866.529.6600. You could also email lruscustomecare@wolterskluwer.com. Feel free to copy Chris (Chris.Pamboukes@wolterskluwer.com) on the message if you would like. This might be part of the migration from print to online formats. The new binder will be generic and shouldn't indicate a specific edition at all.

- Cheetah problems – Users are experiencing problems with different browsers. Chrome is the best browser to use. Internet Explorer 8 or earlier will present some issues. Users should clear the cache and history, and use chrome. If users continue to experience problems with browsers they are encouraged to contact customer care and/or CRIV with a description of the issue. What exactly is happening on the screen? Which browser is causing the problem? These are all important details that can help us identify a solution to the problem.
- Billing Issues – Last year WK transitioned to a single billing system for all its subsidiaries. There have been growing pains and some difficulties. They think most of these have been ironed out. If there are any remaining problems everyone should feel free to contact their account manager, Chris, or CRIV to get them sorted out.

Chris is going to further investigate the docuSign issues. DocuSign serves as a failsafe to make sure that the customer knows exactly what they are ordering. However, docuSign requires the purchaser to agree to terms and conditions which is time-consuming and burdensome for customers who must wait for procurement or similar departments to consent to the terms and conditions.

AALL Programs, Activities, or Business of Interest to WK

CRIV Roundtable – C.J. will make sure WK has all the details.

WK Programs, Activities, or Business of Interest to CRIV and/or AALL

- Cheetah Migration will be completed by the end of this year. Intelliconnect will be officially sunsetted.
- Cheetah Enhancements

- A to Z list of titles is permanently on the blue navigation bar.
- You can now personalize each dashboard.
- Webinars
 - The Wolters Kluwer webinar series, “What Are The Experts Saying (WATES)” has been expanded. So far it has spotlighted the editorial staff at WK. The next phase includes working with attorney customers as well. This way the programs are shining a spotlight on all the experts. Some programs will offer CLE credits. These are all free to customers/cheetah users. You can find a list of Webinars on the [Events Page](#).
 - White Papers – WK has a great library of white papers available. Usually (but not always) these are published along with the webinars.
 - [Tax Cuts and Job Act: Impact to Individuals, Businesses, Energy, Exempt Organizations, IRS Administration, and International](#)
 - [Tax Cuts and Job Act: Impact to Benefits, Payroll, Executive Compensation, and Retirement Professionals](#)
 - [An Attorney’s-Eye View of Significant Executive and Congressional Actions in 15 Practice Areas](#)
 - [Tax Reform Proposal Signals White House Broad Tax Policy for 2017](#)
 - [Practical Insight: Legal Project Management 101](#)
 - [Hot Topics in IP: Litigation under the DTSA and Recent Supreme Court Decisions](#)
 - [After Equifax, A Renewed Focus on State and Federal Cybersecurity Disclosure](#)
 - [U.S. v Martoma Eliminates Proof of Financial or Other Personal Benefits to Tipper for Conviction](#)
 - [Sexual Harassment Roundtable: Webinar Q&A](#)
 - [L&E Evolution: Redefining Employment Relationships](#)
 - [Jackson Lewis: Class Action Trends Report—Minimum Wage Traps](#)

- Recent Developments in Government Contracts Law
- The Green-Eyed Monster at Work: When Does Jealousy Become Unlawful Discrimination?
- Allina II Decision: Too Soon to Declare a Win for Providers?
- Redefining “Healthy” in Food Labeling: Key Themes Emerge
- When can the OCC Charter a FinTech as a National Bank?
- Hot Topics in SEC Filings 2017: Regulatory Roll-backs, FinTech, Cyber, and Blue Sky Offerings
- MACA and FDKC use of Artificial Intelligence
 - MACA:
 - <https://wolterskluwer.com/company/newsroom/news/2017/07/wolters-kluwer-launches-ai-enhanced-ma-clause-analytics-to-streamline-merger-agreement-process.html>
 - <https://lrus.wolterskluwer.com/store/m-a-clause-analytics/>
 - FDKC:
 - <https://wolterskluwer.com/company/newsroom/news/2017/09/wolters-kluwer-introduces-ai-powered-predictive-analytics-to-federal-developments-knowledge-center.html>
 - <https://lrus.wolterskluwer.com/store/federal-developments-knowledge-center/>
- RBSource with RegReview:
 - <https://www.prnewswire.com/news-releases/wolters-kluwer-transforms-the-sec-filings-process-with-introduction-of-regreview-300539862.html>
 - <https://www.lawsitesblog.com/2017/10/wolters-kluwers-new-regreview-expedites-sec-filings-identifying-changes-law.html>
 - <https://abovethelaw.com/2018/02/regreview-by-wolters-kluwer-finally-rule-checking-and-sec-filings-made-simple/>
- <https://www.lawsitesblog.com/2017/07/wolters-kluwer-unveil-two-tools-bolster-securities-law-work.html>
- <https://lrus.wolterskluwer.com/store/rbsource-rbresourcefilings/>
- IPO Vital Signs
 - <https://www.ipovitalsigns.com/Public/WhatIsAnIPOVitalSign>
 - <https://lrus.wolterskluwer.com/store/product/ipo-vital-signs/>
- State Tax Plus
 - <https://lrus.wolterskluwer.com/store/state-tax-plus/>



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