THE CRIV SHEET

THE NEWSLETTER OF THE COMMITTEE ON RELATIONS WITH INFORMATION VENDORS

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YOUR LEGAL KNOWLEDGE NETWORK™

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EDITOR'S CORNER

R. MARTIN WITT
HEAD OF PUBLIC SERVICES
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Hello dear reader, and welcome to Volume 41, Issue Number 2 of ***The CRIV Sheet***! This issue brings us four items—two original articles by valued repeat contributors (Deborah Heller and Cas Laskowski) and the minutes from the most recent LexisNexis and Wolters Kluwer semiannual calls.

As always, *The CRIV Sheet* is always seeking new ideas and contributors, so please feel free to reach out if you have an idea that you think might be worth discussing or developing. The question you've dealt with, the solution you've developed, the issue you've faced, the resource you've discovered—each of these has tremendous value to your colleagues within law librarianship, and *The CRIV Sheet* can serve as a vehicle to share that valuable content widely.

In between issues of *The CRIV Sheet,* don't forget to keep an eye on the ***CRIV blog***. There you'll find not only the immediate release of finalized semiannual call minutes, but also regular quick hits identifying interesting and helpful information related to vendors, law, librarianship, and the many ways these avenues intersect.

Looking ahead to the next issue—the final for this volume year—we hope to highlight some offerings from new contributors, our preview of AALL Annual Meeting recommended programs, and the remaining semiannual call minutes.

FROM THE CHAIR

C.J. PIPINS
RESEARCH & ACADEMIC TECHNOLOGIES LIBRARIAN
UNIVERSITY OF MARYLAND FRANCIS KING CAREY SCHOOL OF LAW

Welcome to the second issue of the 41st volume of *The CRIV Sheet*. As I pen this, we are preparing to bid adieu to 2018 and embark on 2019. The past year provided a host of challenges to embrace: for our nation, our association, and for vendor relations. The year ahead will no doubt present new challenges in vendor relations as we work through already existing issues. CRIV is committed to continue advocating on behalf of AALL members and toiling to keep communication lines open between members and those who provide them with services and resources.

This issue of *The CRIV Sheet* covers a nice variety of topics, and I'm sure you will find something useful or interesting throughout. It features an article from Cas Laskowski, who has previously contributed to *The CRIV Sheet*, as well as a piece from CRIV member Deborah Heller. The credit for the success of this issue belongs to *The CRIV Sheet* editor, Marty Witt. I am continually grateful for his editorial perspective and hard work on *The CRIV Sheet*. If you have ideas for future articles or would like to be a contributor, please don't hesitate to contact Marty.

CRIV is doing more than just curating content for *The CRIV Sheet*. Our semiannual vendor liaison calls have taken place or are scheduled, and you'll find details of those calls in this issue as well as the next. The education subcommittee is working on a webinar proposal, and the CRIV Tools subcommittee is working on verifying and updating the constantly changing vendor contact information on the **website**. If you find that you can't wait until our next issue, never fear, the *CRIV Blog* is still an excellent source of vendor relations content, expertly coordinated this year by Karen Provost.

Finally, CRIV is actively working on more than 10 AALL member requests for assistance with vendor relations that we have received since the AALL Annual Meeting. We are also continuing to work with the AALL Executive Board on ongoing advocacy activities. If you have any questions or concerns, please don't hesitate to contact me. If you need to submit a request for assistance, you may do so through our **webform**.

CRIV Blog
crivblog.com

Karen Provost
COORDINATOR

Vendor Roundtable

Pablo Arredondo
David Gayt
C.J. Pipins
Caroline Walters
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Vendor Liaisons

R. Martin Witt
Bloomberg BNA

Karen Provost
LexisNexis

Caroline Walters
Thomas Reuters

C.J. Pipins
Wolters Kluwer

A NEW WAY TO FIND CRS REPORTS

DEBORAH L. HELLER
ENVIRONMENTAL LAW LIBRARIAN
ELISABETH HAUB SCHOOL OF LAW AT PACE UNIVERSITY

The Congressional Research Service (CRS) is a part of the Library of Congress and works for Congressional Committees and members of Congress. CRS provides policy and legal analysis on a nonpartisan basis. More than 400 people work across five different research areas including American law; domestic social policy; foreign affairs, defense, and trade; government and finance; and resources, science, and industry. For years, its reports have been a useful, albeit sometimes hidden, resource for researchers, but no longer. With the passage of the Consolidated Appropriations Act of 2018, Congress lifted the prohibition on making CRS Reports public and authorized the creation of a website to provide these reports to the public.

Public Law 115-141 became law on March 23, 2018. Division I, Title I includes Sec. 154(b), which discusses the availability of Congressional Research Service Reports through the Library of Congress website. It calls for establishing and maintaining a free public website with searchable, sortable, and downloadable CRS Reports, labeled as new, updated, or archived. All reports compiled or revised after passage of the law are to be included on the new website, with plans to make additional earlier reports and products available in the future. The law also requires an index of the available reports to be included on the website. Confidential reports will remain unpublished. The law also contains a written statement to be included on the website, which acknowledges the role of CRS, the copyright in the work, and distribution rights.

In September 2018, the **Library of Congress CRS Reports webpage**, was unveiled to the public. The written statement included in the law appears as a disclaimer on the front page of the website. It is a simple interface, as might be expected for a website developed by the government in about six months. The index does not fall under a separate heading; users who want what passes as an index of all the items on the website must follow the instructions provided on the homepage in order to press the search button without entering text in the search box. Taking such action will yield a list of CRS products currently available on the website. As of Mid-January, more than two thousand items appear. This index allows users to refine their queries by searching within the results or filtering by topic, author, date, or status. The entries show the title of the product as well as its identification number, author, date, revision history (if applicable), and a link to download a PDF of the report. Interestingly, the main search box, which moves toward the top of the page when you run a search to retrieve the index, now has a question mark displayed next to it. If you click on the question mark, you will get a page explaining what is searched, how to narrow a search, how to expand a search, and how to formulate a search.

The index searching works very well, particularly if you are unsure about what search terms to use or if you do not want to miss a report that might be available. When you know which research terms to look for, the search mechanism seems to work well and retrieve relevant results. The system searches all words in a query. However, users can use the Boolean operators "OR" and "NOT" if typed in all caps. Users can also incorporate quotation marks to run phrase searches but are encouraged to remove the quotation marks if results seem fewer than expected. Since the system searches for all words, use of "AND" is generally discouraged, although it can work in some circumstances. Searches are initially performed against the title and authors of the reports but can be expanded to the full text by clicking the checkbox near the top right of the search results page.

There are two other features on the website. First, there is the *Appropriations Status Table*. This feature provides information going back to fiscal year 1999. This table provides information relating to legislative activity of the appropriations and budget process, including status of continuing resolutions, regular appropriations bills, and supplemental appropriations bills. The other feature is the *About Site & FAQs*, which provides background on the CRS and what the reports entail, such as information on the addition of more reports to the site, republishing information, etc. The Library of Congress and CRS anticipate a full migration of R series reports by spring 2019, with other resources to follow. The website also provides hyperlinks to other relevant government websites, including **Congress.gov**, the **Library of Congress**, and the **United States Copyright Office**.

BUILDING VENDOR RELATIONSHIPS THAT ADD VALUE

CASANDRA M. LASKOWSKI
REFERENCE LIBRARIAN AND LECTURING FELLOW
J. MICHAEL GOODSON LAW LIBRARY, DUKE UNIVERSITY SCHOOL OF LAW

At the Duke University School of Law, the legal technology-related coursework varies widely, from robotics to fintech to access to justice. The library has extensive experience training on legal and other technology. We have a Law Practice Technology course co-taught by a librarian and an academic technologist and micro-lessons about various technology. We have also been transforming our former media creation space into a legal technology engagement space. We wanted this redesigned library space to be a convergence point for different technology engagement initiatives, so we renamed the space the Tech Hub.

We do not have an infusion of grant funding, so the reinvention has relied on creative resource gathering and brave outreach. Legal technology is expensive, so my expectations were low for what we might be able to pull off in this initial push. What I realized after dozens of calls with a variety of vendors is that many of them want to find a way to help. With a bit of flexibility and creativity, we were often able to find mutually beneficial solutions. Outlined below are some tips for crafting valuable vendor relationships.

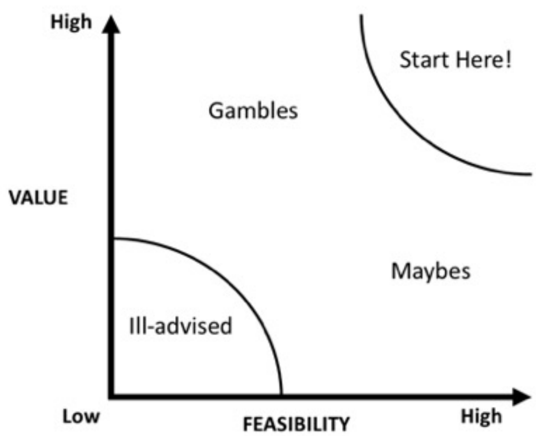
DREAM BIG

Before reaching out to vendors, before reviewing your resources, and even before identifying limitations … dream big. Identify everything you wish you could do if resources did not matter. Try to answer this broad question: How might we increase student engagement with technology used in legal practice? Note that this question does not assume the answer (e.g., how do we create training programs?). The broader the questions, the more freedom you give your team to be creative.

PRIORITIZE

Once you have a solid idea for what you hope to do, begin to analyze your available resources. Do not limit your review to hardware. Look at space, employee skill sets and interests, and university support. Begin to identify possible vendor partners, but do not reach out yet. After this review, begin to take your ideas from step one and place them on a prioritization chart (see chart, next page).

Value will depend on who your users are and what your institutional goals are. Internal value factors include user desire (what are they asking for?) and need (what is most useful in their current/future positions?). External value factors might include visibility (how likely is someone going to know about this?) and marketing (how might this increase our profile?). The chart forces you to think about the value each idea provides to your user, how easy it is to implement, and where these ideas converge.



Ideas that are both particularly feasible and highly valuable are the first that you should look to carry out. Archive unfeasible ideas that lack value. I do not suggest discarding them completely. Your resources and situations might change, and you can revisit them in future brainstorming sessions.

This middle area is where big decisions must be made. The more difficult an idea is, the riskier it is to implement. Even valuable ideas might find no traction, so you must be open to failure. Easy initiatives of low value might be worth pursuing but can be demoralizing if you spend more effort on them than the value you get back. The decisions you make here will be unique to your institution.

COMMUNICATE OPENLY

You now have the information you need to reach out to vendors, but you also need the mindset. Speaking with vendors is often an iterative process. The first call is informational. You learn how the software/service works and they determine your needs. For these conversations to be fruitful, you need to be forthcoming and flexible.

I never gave vendors an exact figure for our budget, but I was honest that we were prudent with our limited resources. For example, when discussing a document automation software, the representative asked if we were interested in their case management software (CMS). Since we already had access to two different CMSs, we admitted that we would not be able to justify paying for additional CMS software. Appreciating the honestly and knowing that they would be unable to provide a free version, we continued forward speaking about the original software.

Several vendors I called had never considered the academic market or were just looking into it. Others had free versions of software available for use by academics but did not necessarily have a model for a lab version. These conversations often became brainstorming sessions as we attempted to understand each other's situation well enough to explore possible options. Once we found one, we remained in touch to see if the solution worked, or if we needed to pivot.

PLAN FOR THE FUTURE

Throughout this process, you have likely identified several products that are not well-suited for your efforts at this time. As you archive these quotes and contacts, set a follow-up date. No connection or idea should be entirely written off. As your other efforts succeed or your mission changes, you might find that you have increased buy-in or can procure additional resources that would allow you to pursue some of these other ventures. Setting that date now ensures your review will not be forgotten amidst other projects and deadlines. If you've been clear and open in your communication, you will have built connections you can lean on in these future reviews.

As an aside, you might have noticed that many of the strategies above leveraged design-thinking methodology. This article did not address a full design-thinking framework, but I hope it illustrated the value of creatively and openly approaching new endeavors. Design thinking is not without its limitations, but it can remind us to never approach problems with a solution already in mind.

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 LexisNexis and Wolters Kluwer.

CRIV / LEXISNEXIS FALL SEMIANNUAL CALL

Date: November 29, 2018

Participants: Carolyn Bach (Sr. Manager, Librarian Relations and Faculty Programs, LexisNexis), Teresa Harmon (Sr. Director, Segment Manager, LexisNexis), Vani Ungapen (AALL Executive Director), C.J. Pipins (CRIV Chair) & Karen Provost (CRIV Liaison)

REQUESTS FOR ADVOCACY

There were two advocacy requests from law firms unable to renew their Law360 subscriptions without having a Lexis Advance contract. Lexis reached out to both firms to resolve, and provided us with this updated clarification around product packaging:

We've worked with Law Librarians and AALL over many years and deeply respect our longstanding relationship with this community. We see Law Librarians as critical collaborators in the journey to evolve our offerings and better serve all customers. It is in that same spirit that we're engaging with AALL to fully understand the concerns that have been raised. Ultimately, our goal is to provide legal information and analytics that help lawyers cut through vast amounts of data to efficiently gain insights, make better decisions, and achieve the best outcomes possible.

We appreciated the time and effort the AALL leadership team put into sharing their insights on our products and pricing. We will certainly keep these perspectives in mind as we move forward. We also were grateful for the opportunity to discuss our integrated product strategy and our compliance process that includes internal and external legal review of all pricing and packaging prior to release to customers. Since pricing and packaging plans vary by customer type and are customized to meet specific customer needs, we encourage members to follow-up with their LexisNexis account representative with any questions regarding their firm's specifics.

Monthly invoices for online products started to include a $2 charge per paper invoice. Customers were notified in the three prior invoices that a print invoice charge is forthcoming and were directed to the registration process for electronic invoicing. LexisNexis has worked hard to improve the online billing service and PowerInvoice™ so that all customers can enjoy hassle-free paperless billing. This offers a much more complete billing experience than paper: customers can view their invoices, statement of account, or pay an invoice at any time in PowerInvoice.

To avoid this charge, simply register to receive electronic invoice notification emails via PowerInvoice. After viewing an invoice cite list, open invoices or your statement of account, click on register for online account management link to sign up, or contact your LexisNexis representative to assist.

NEW PRODUCT RELEASE

We are very excited to share the news about Context on Lexis Advance, a new product that released on November 29. Context is the legal industry's first and only language analytics product that helps legal professionals build the best arguments for cases by knowing how judges are likely to rule on motions. Powerful language analytics are deployed across millions of documents, so one can quickly identify the language a specific judge frequently relies on and understand how an expert's testimony stands up to judicial scrutiny.

Law School faculty received access to Context on Nov. 29th as part of their law school's subscription. Students will have access in January. All commercial customers can **preregister for free access** for a limited time.

LEXIS ADVANCE ENHANCEMENTS

Ravel View: Ravel View is a unique data visualization tool on Lexis Advance that helps users find the most influential cases faster, including cases that may have been overlooked. After running a search in case law, users can select the Ravel View icon that displays an interactive visual map of the top 75 cases and how they connect and interact with one another. Shepard's® treatment is also integrated so researchers can quickly determine if a case has been treated positively or negatively. A popular tool among associates and law students.

Custom Pages & Non-billable Zones: Non-billable zones on Lexis Advance are a new custom solution exclusively available for law firm administrators to build and centrally control content sets. They can be shared firmwide or they can be sent to a group within the firm. A key benefit is that users in a non-billable zone can easily transition to and from billable research. Also, non-billable zone-specific usage can be tracked in PowerInvoice and reduce billing data admin.

A clarification, where non-billable zones are set up by administrators, we also have a solution for end users called Custom Pages that released last spring. This is a tool that individual users can access to set up their own personal custom page with their go-to sources etc.

Shepard's: The new Shepard's case card visually displays Shepard's treatment, including the number of citations for each treatment, right from the results screen, which helps researchers determine case relevance faster while browsing through their case law results. You can also view the most cited headnote in the case and display the Reason for Shepard's Signal™ language—the language from citing references that most influenced a case's Shepard's Signal.

- Shepard's treatment for Notice of Appeal Filed has been applied to federal cases generating a yellow caution signal.
- Shepard's treatment has been applied to statute subsections in select jurisdictions.
- History grace period: Commercial customers who bill research can re-run searches within 24 hours without incurring an additional charge (from the search box, history, or saved in Work Folders).
- New segments in Jury Verdict & Settlements, Law Reviews & Journals, and Company profile content.
- Federal case law enhancements: notice of appeal terminated and reporter placeholder for new Federal cases.
- Filter improvements in News content.
- Law360 newsletters now include hyperlinks to Lexis Advance for cited references.

LEXIS PRACTICE ADVISOR ENHANCEMENTS & NEW OFFERINGS

New offerings: Data Security & Privacy, Tax, Private Equity and Investment Management, and Financial Services Regulations. These practical guidance modules include access to practice notes, forms, clauses, checklists, secondary content, and relevant primary law.

State Law Comparison Tools: The new State Law Comparison Tool helps researchers quickly compare laws across states. The tool is available now for Labor & Employment, Data Security & Privacy, and Intellectual Property & Technology, and will expand to more practice areas.

Smart Forms: The Lexis® Smart Forms tool provides automated legal templates in a question and answer format. The tool builds documents with the right data and clauses based on user answers. Completed forms can be downloaded as Microsoft Word files (.docx) or PDF. Smart forms are included in select Lexis Practice Advisor practice areas including Commercial Transactions, Corporate and M&A, and Labor & Employment, with more on the way.

2019 plans: Enhancements planned for Transaction Search, drafting solutions, and developing more industry content in Financial Services, Insurance, Energy, Life Sciences, and Healthcare.

AALL UPDATES

LexisNexis is continuing their sponsorship for the 2019 AALL/LexisNexis Call for Papers Awards and their longstanding LexisNexis AALL research grants.

CRIV / WOLTERS KLUWER SEMIANNUAL CALL

Dates: Thursday, November 29, 2018 / 11:00 a.m. Central

Participants: Vani Ungapen, Jennifer Ellis, Chris Pamboukes & C.J. Pipins

AGENDA
WELCOME
OUTSTANDING REQUESTS FOR ADVOCACY

None

AALL PROGRAMS, ACTIVITIES, OR BUSINESS OF INTEREST TO WK

CRIV Vendor roundtable at AALL—C.J. will keep everyone in the loop once scheduling and topic selection are complete. One topic idea is Artificial Intelligence (AI). WK recently had an event in which the focus was AI and security, so they will definitely be able to participate in such a discussion.

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

There is a new library relations contact at Wolters Kluwer. Chris Pamboukes is leaving WK, and CRIV's interim contact will be Jenna Ellis.

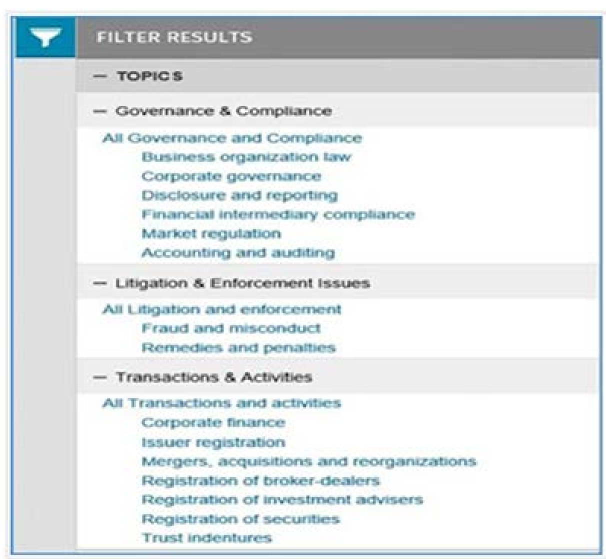
NEW ENHANCEMENTS TO WK PLATFORMS

There is a Federal and International Securities (beta) related items button, based on machine learning, and WK is requesting feedback from users as to the applicability and functionality of results:

"This list of related documents is generated using a proprietary system of model-based machine learning algorithms which weight the distribution of topics and words along with the presence of inbound and outbound links. We're piloting this feature in the Securities area and will expand to other content sets based on user feedback. Please, let us know how well this meets your expectations and anything you think can be improved."

TOPIC FILTER FOR SECURITIES & CORPORATE RESEARCH (see picture below):

Introducing the new **Topic Filter for the Securities & Corporate** content on Cheetah. Designed as both a pre- and post-search filter, this innovation allows users to quickly find content in the desired relevant area for a more targeted list of sources.



Navigate to specific topics by drilling down to sub-topic levels, narrowing your search results further. These new filters will replace Securities Topic Navigator, which is being discontinued. The new filters, being incorporated into the overall search process, should allow for a more integrated experience.

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