

THE CRIV SHEET

THE NEWSLETTER OF THE COMMITTEE ON RELATIONS
WITH INFORMATION VENDORS

VOLUME 41, NO. 3 / MAY 2019





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

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Published by the American Association of Law Libraries
105 West Adams Street, Suite 3300
Chicago, Illinois, 60603
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CONTENTS

Editor's Corner	4
From the Chair	5
Gone Forever? Preservation Concerns for Secondary Legal Sources in the Electronic Age and Why it Matters.	6
The CRIV Sheet / Recommended Programs for the 2019 AALL Annual Meeting	8
CRIV Liaisons to Vendors	11
CRIV / Bloomberg BNA Semiannual Call	11
CRIV / Thomson Reuters Biannual Call	15



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Welcome to Issue 3, the final issue of Volume 41 of *The CRIV Sheet*!

As the year draws to a close, I'd like to take a moment to recognize C.J. Pipins for all of the hard work he has put into the Committee on Relations with Information Vendors over the past year. His tremendous focus and leadership has helped CRIV continue to provide a valuable service to AALL members and has set the bar high for all those who follow.

With this last issue of Volume 41, I'd also like to thank the members of *The CRIV Sheet* subcommittee for their valued contributions in writing, editing, and providing feedback on this publication. Karen Grushka, Deborah Heller, the aforementioned C.J. Pipins, Matt Timko, and Caroline Walters have collectively committed considerable time to *The CRIV Sheet*, and publication wouldn't be possible without their hard work. I look forward to continuing to work with many of them in the future.

Similarly, I'd like to thank Heather Haemker, AALL's publications manager, for her incredible patience and great eye for detail. Producing each issue of *The CRIV Sheet* is made immeasurably easier having her on the other side.

The featured original article in this issue is co-authored by Mindy Kent and CRIV member Caroline Walters, and it aims to bring to the forefront the important issue of preservation of historical legal resources. CRIV has done work related to this topic, including a survey to vendors and roundtable at the 2018 AALL Annual Meeting, and the article below will hopefully serve as a call to continuing action for vendors and librarians alike.

This issue also includes some program recommendations for the upcoming **2019 AALL Annual Meeting** that we hope will be of particular interest to readers of *The CRIV Sheet*. If you are going to be attending any of that programming, or any other programs that other readers might find interesting, I encourage you to consider writing a brief summary for inclusion in a future issue of *The CRIV Sheet*. Writing a program synopsis or review can be a great way to spread awareness of important issues related to vendor relationships, a topic that continues to involve more aspects of legal information and library work, and can be a good professional development stepping stone as well.

Finally, we have included the final two semiannual CRIV calls with vendors, featuring Bloomberg BNA and Thomson Reuters. In them, a number of enhancements are detailed, as well as responses to issues raised by CRIV and AALL member requests for assistance.

FROM THE CHAIR

C.J. PIPINS

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

Welcome to the last issue of *The CRIV Sheet* for this year. Where did the time go? It has been such an honor to serve as chair of CRIV, and I am very thankful for the opportunity to serve AALL in this position. This year has been a busy and productive one. We published three issues of *The CRIV Sheet*, made numerous posts to the [CRIV Blog](http://crivblog.com), and our education subcommittee has started developing a webinar that we hope to offer to the AALL membership.

Of course, I can't forget the semiannual vendor relations calls with several major legal publishers with which the liaisons are diligently scheduling as I write this. We are continuing to pursue ongoing requests for advocacy by AALL members. One ongoing matter about which we still hope for a resolution is the LexisNexis policy of refusing to sell Lexis print and ancillary online products to law firms that don't renew their Lexis Advance subscriptions. AALL's Executive Board has taken a position and action on the matter and we hope to be able to reach a satisfactory outcome very soon. We have also begun working on 10 new requests for assistance on a range of issues from billing practices to the phasing out of long-standing resources. The committee has worked very hard this year. I am impressed and humbled by each of their contributions and the enormous dedication they display.

In this issue of *The CRIV Sheet* you will find a wealth of vendor-related information. There are the minutes from two of our semiannual vendor liaison calls with Bloomberg/BNA and Thomson Reuters. We also have a great article from our very own Caroline Walters about preservation that you don't want to miss. We have selected a few programs to highlight at the upcoming AALL Annual Meeting that we think are particularly relevant to the work and activities of CRIV.

Speaking of the AALL Annual Meeting, I hope to see everyone on Sunday, July 14 at 1:00 p.m. at the CRIV Vendor Roundtable. We will be in the Walter E. Washington Convention Center Room 143 B. The topic for this year's Roundtable will focus on Artificial Intelligence and how it's being implemented in the legal information profession. We are also going to explore the unique identifiers that both Lexis and Westlaw assign to new cases and how to improve access to those identifiers for consumers of legal information. Do you have a more pressing issue to discuss with senior library relations staff and management from all of the major publishers? Please don't let our prepared topics discourage you from coming to discuss your concerns. Think of this as your opportunity to discuss whatever concerns you are experiencing.

CRIV Blog
crivblog.com

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Coordinator

Vendor Roundtable

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David Gayt
C.J. Pipins
Caroline Walters
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Vendor Liaisons

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Karen Provost
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Caroline Walters
Thomas Reuters
C.J. Pipins
Wolters Kluwer



Finally, I want to say thank you. The entire CRIV committee has done great work this year, and I am extremely grateful for their hard work and good humor. Thank you to *The CRIV Sheet* subcommittee: Karen Grushka, Caroline Walters, Matt Timko, and Deborah Heller for working with deadlines, emails, calls, and yet another responsibility to make *The CRIV Sheet* possible. A special thank you to my Vice Chair Marty Witt. Marty has taken on several leadership tasks for CRIV including his masterful editing of *The CRIV Sheet* for the past two years and stepping in as the Bloomberg

BNA vendor liaison this year. I will rest easy knowing that I leave CRIV in your insanely capable hands for the 2019-2020 membership year. Last but not least, thank you to all of the members of AALL. It has been a pleasure to serve you as the CRIV chair.

GONE FOREVER? PRESERVATION CONCERNS FOR SECONDARY LEGAL SOURCES IN THE ELECTRONIC AGE AND WHY IT MATTERS.

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

The Problem

Last year a CRIV-sponsored survey was conducted to determine a baseline of present vendor practices regarding the preservation of historical legal resources. [The article](#) about this effort, along with the survey results, can be found beginning on page 10 of *The CRIV Sheet*, Volume 40, No. 2 (May 2018). Following the survey, CRIV dedicated the AALL Annual Meeting Roundtable discussion to this topic. The problem is simple: *When new editions of major treatises are published electronically, the older electronic edition is no longer available on most legal platforms.* The survey results and the ensuing dialog with our vendor partners during the CRIV Roundtable made two questions clear: Why is this important? And why would anyone ever need an earlier edition of a secondary resource when the newest edition is readily available electronically on a variety of legal platforms?

The answer to the first question is two-fold: First, it is important because increasingly, law libraries, including research libraries, are actively choosing to cancel print when it is reliably available electronically. These decisions are made mostly due to space, budget, and staffing constraints. Although it is desirable to make legal treatises available to our patrons (for both present and future patrons) in print and electronic format, it is no longer a sustainable practice for the reasons stated above. Therefore, many libraries are forced to choose the electronic format.

Secondly, this growing, and often necessary, trend will have permanent repercussions for future legal scholarship. When we make these choices in collection development, we are actively breaking future scholarship because when new editions are published, most publishers remove the earlier editions from their platforms.



This is where we need a call for action. We need to engage legal publishers to help solve this problem. In order to make the case and to answer the second question, we outline below, a sample of research requests that demonstrate the need for access to earlier editions.

The Research: Examples from a Research Library

At the 2018 CRIV Roundtable, one publisher was curious about the need to retain previous editions and asked for real-life scenarios. These examples of the range of questions asked by Harvard Law School researchers demonstrate why it is important to retain previous editions of treatises.

- Older treatises remain a major source for supporting a historical perspective in teaching and writing. As an example, one of our faculty members teaches and writes on trusts and estates. In his research, he regularly consults both current and previous editions of *Scott and Asher on Trusts*. He has asked the library to keep the older edition on the shelf because it is no longer available electronically.
- For scholars studying the historical development of a field of law, treatises provide a sequence of snapshots of how the law was understood and interpreted in the past. As part of a project tracing the development of equity, one of our alumni consulted a series of treatises published between 1877 and 2007 to identify changes in the subject.
- Treatises can also serve as a primary historical source for the study of legal thought. One of our SJD students compared the organization of multiple editions of treatises in property, conflicts of laws, and corporations in order to demonstrate the changes in conceptual organization of the subjects over time.
- Treatises also provide a rich source for the language of the law. As text mining continues to grow as a source of study, a robust corpus of legal writing is necessary. Recently another one of our students compared the text of a number of treatises on labor and employment law in order to pinpoint the decline

of the use of the term “master & servant” and the appearance of the term “employment-at-will.”

The Solution

The problem may be simple, but the solution is not. At the CRIV Roundtable, vendors expressed reluctance to keep earlier editions on their platforms because of the cost of storage. Yet despite the cost, one publisher, PLI, is actively making a commitment to not only keeping their older editions on their platform prospectively but is also loading even older editions retrospectively. We commend their efforts and hope others will join them.

Another consideration that was not addressed at the CRIV Roundtable but should be considered by publishers is data. As the research example provided above demonstrates, text data mining and digital scholarship are growing areas of academic pursuit. Perhaps potential revenue gained by making TDM possible could offset the cost of digital storage on vendor platforms. Vendors have the data, why not use it? By making earlier editions searchable on their platforms, publishers would not only solve the problem of the loss of historical research, but they would also be able to offer datasets to their customers, a win-win scenario.

Publishers and librarians share a duty to preserve the historical record. As print moves to the electronic realm, libraries continue to cancel print while publishers expand their electronic content. We need to stop to consider the impact of these developments by working collaboratively to identify problems and to come up with solutions to protect the future of legal research. As stewards of legal information this responsibility must be faced together.



THE CRIV SHEET / RECOMMENDED PROGRAMS FOR THE 2019 AALL ANNUAL MEETING

With the release of the [conference schedule](#) for the [2019 AALL Annual Meeting](#), AALL members have a chance to preview all the great programs being offered. As has become a spring tradition, *The CRIV Sheet* subcommittee is pleased to offer some recommendations on programming that we think may be of interest to our readers. If you attend any of these programs, or any other programs or educational opportunities you think may be of interest, please consider writing a synopsis for *The CRIV Sheet* Summaries, to be included in the November 2019 issue. If you are interested, please contact *The CRIV Sheet* editor, [R. Martin Witt](#).

COMMITTEE ON RELATIONS WITH INFORMATION VENDORS (CRIV) VENDOR ROUNDTABLE

Sunday, July 14
1:00 p.m.-2:00 p.m.
WCC Room 143 B

The roundtable is a great opportunity for AALL members to pose questions and raise issues directly with leaders of the large commercial vendors. A central point to the existing agenda is the issue of artificial intelligence and the vendor plans to (continue to) incorporate it in their products, but there will be other items of general interest as well.

DO MORE WITH LESS: WORKPLACE EFFICIENCY TOOLS

Sunday, July 14
2:30 p.m.-3:30 p.m.
WCC Room 145 AB

Tasked with doing more with less? Wondering how to track goals for yourself and your department? Learn how to manage your increasing workload with tried-and-true workplace efficiency tools that the panelists have put to the test in innovative ways. These tools include Kanban boards, Slack, LibAnswers, and more.

PERMISSION GRANTED: NAVIGATING THE COPYRIGHT PERMISSION PROCESS SUCCESSFULLY

Sunday, July 14
4:00 p.m.-5:00 p.m.
WCC Room 145 AB

Law firm clients, attorneys, professors, and librarians may seek to use copyrighted material in works ranging from books to presentations to ad campaigns. When do you need to seek permission to use a work under copyright? How do you determine the owner and craft a strategic request for permission? In this session, presenters will describe how they have successfully obtained permissions and guide participants through case studies designed to help you navigate the permission process successfully and ethically—and to avoid a cease-and-desist letter or take-down notice.

LAW LIBRARIANS AND ONLINE SECURITY: TRANSFORMING TALK INTO ACTION

Sunday, July 14
4:00 p.m.-5:00 p.m.
WCC Room 146 B

We've heard a lot about data breaches and how organizations have suffered, prevented, responded, and reacted to online security threats. This session will focus on what librarians can do to protect themselves and their institutions, as well as how librarians have responded when their organizations have been attacked. Topics will include security standards, VPNs, security beyond passwords, two-tier authentication, privacy settings, pros and cons of metadata, phishing, social engineering, and other online security issues. Participants will also learn how to teach users about online safety, which is everyone's responsibility.

DEEP DIVE: THE FEDERAL AND STATE COURT ANALYTICS MARKET—SHOULD THE BUYER BEWARE? WHAT'S ON THE HORIZON?

Monday, July 15
9:30 a.m.-12:00 p.m.
WCC Room 151 AB

The number of federal and state litigation analytics products has exploded in the legal marketplace, making it difficult to stay current with and understand which platforms can meet your organization's specific needs. To give attendees a broad understanding of the market, this Deep Dive will feature three separate panels:

Panel 1: A group of law librarians will present results of a controlled comparison test of major federal analytics products that address scope, functionality, and usability.

Panel 2: A panel of representatives of state court analytics products, including both start-ups and large vendors, will have the opportunity to describe the strengths, weaknesses, and challenges associated with state court analytics.

Panel 3: A moderated panel of thought leaders and representatives from analytics companies will discuss current challenges and share future plans for development of products and integration into lawyer workflow and law firm business intelligence platforms.

I KNOW IT USED TO BE THERE: USING WEB ARCHIVES IN LEGAL RESEARCH

Monday, July 15
9:30 a.m.-10:30 a.m.
WCC Room 147 AB

Content is always changing on and disappearing from the web. Cited web resources become unavailable (aka, "link rot"). The Internet Archive's Wayback Machine, the Harvard Library Innovation Lab's Perma.cc, the Library of Congress Web Archives, and other archives of web content preserve webpages and documents. The archived web sources may be useful for litigation, competitive intelligence,

scholarship, or other purposes. How can legal information professionals and their clients best use these web archives? What are the key features of each of these archives? Which ones are best for finding or storing a particular kind of webpage or file?

THE AGE OF AI: EMERGING REGULATORY LANDSCAPE AROUND THE WORLD

Monday, July 15
11:00 a.m.-12:00 p.m.
WCC Room 146 A

The Law Library of Congress brings a global perspective to analyzing current and emerging legal issues. During the program, the panel will share insights from the Law Library's comparative survey of legal and policy approaches to artificial intelligence (AI) around the world. The speakers, who are Law Library foreign law specialists covering various regions and legal systems, will discuss some of the regulatory trends, challenges, and governmental strategies related to AI. The panel will address several legal issues regarding AI from a comparative perspective, including but not limited to: civil and criminal liability, privacy and data protection, surveillance and national security, and transparency.

DEEP DIVE: THINGS YOU NEED TO KNOW BEFORE MOVING TO A NEW ILS

Monday, July 15
3:00 p.m.-5:30 p.m.
WCC Room 152 AB

With the rising cost of ILS system maintenance, more and more libraries are moving toward or considering moving toward a new ILS, one that is less expensive with (or integrating better with) an open source/customizable discovery system. However, there are lots of technical issues one needs to know before jumping into the pool. This program will present the pros and cons of technical issues during and after the data migration and system transition, so that other libraries considering a move may be better prepared for all the challenges and surprises.

THE LIBRARIAN'S ROLE IN ACCESS TO RELEVANT LEGAL INFORMATION AND NEWS

Monday, July 15
4:30 p.m.-5:30 p.m.
WCC Room 146 A

Recommender's note: The abstract/description for this program is not yet available, but based solely on the title it seemed worthy of inclusion.

BUILDING THE CASE FOR LEGAL INNOVATION

Monday, July 15
4:30 p.m.-5:30 p.m.
WCC Room 146 C

To be effective in pitching legal innovation, it requires an understanding of an organization's strategy or mission and the stakeholders who will help support the innovation effort. Dean Sonderegger will moderate a discussion with a diverse panel of experts from academia and law firms to provide practical guidance, tools, and best practices drawn from real-world examples of successful legal innovation efforts. Attendees will learn about the drivers within an organization that lead to the adoption of legal innovation and be able to link those drivers to a proposed solution or initiative.

ARTIFICIAL INTELLIGENCE AND IMPLICIT BIAS

Tuesday, July 16
8:30 a.m.-9:30 a.m.
WCC Room 146 A

Algorithms and taxonomies are ultimately created by human beings with our own prejudices and stereotypes. Your black box and other artificial intelligence (AI) technologies and platforms could be replicating or even aggravating the same issues when it comes to discrimination of information regarding specific groups or just ignoring highly important data crucial to a case or your patron. In this session, we will explain the ways in which these AI platforms rely on human beings and their own implicit biases, assess how much of crucial legal information regarding a case or your client has

been discarded or relegated to a lesser importance, and identify ways in which law librarians can tackle this issue.

DATA VISUALIZATION TO HELP SET FIRM RENEWAL STRATEGY

Tuesday, July 16
8:30 a.m.-9:30 a.m.
WCC Room 146 B

Budget season is always a busy time at every firm. With new technologies being released continuously and a budget that needs to be managed, how can library teams understand the value of what they already have or plan for their next acquisition? Data visualization may be the answer to help harness all the usage data that firms create. Visualization helps tell the story of each user, each subscription, and each online resource to help a savvy team understand what's happening today and strategize for tomorrow. Don't wait for your vendors to come to you with usage data and analysis—create your own analysis and strategy to meet your firm's needs.

INNOVATION TOURNAMENT (SPONSORED BY LEXISNEXIS)

Tuesday, July 16
11:15 a.m.-12:15 p.m.
WCC Room 146 B

Innovation tournaments are opportunities to leverage the expertise of a group to come up with solutions that can address a particular challenge. First implemented within corporations to generate creative input among employees, innovation tournaments have now crossed into other sectors, such as academia, the tech world, and the AALL Annual Meeting & Conference. Legal information professionals are forgoing the status quo every day; this is an opportunity to showcase their ideas.

For the culmination of the tournament, finalists will present their innovation plans to the audience, which will include a special panel of judges. At the conclusion

of all presentations, two separate votes will take place: one conducted by the panel of judges, and another conducted

by the audience. Two winners will be chosen; each will be awarded a \$2,500 prize.

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 and Thomson Reuters.

CRIV / BLOOMBERG BNA SEMIANNUAL CALL

Date: December 21, 2018 / 12:00 p.m.

Participants: R. Martin Witt (CRIV Liaison), Joe Breda (President, Bloomberg Law), Michael Bernier (Director, Library Relations, Bloomberg Law) & Andrew Prior (Senior Customer Experience Director, Bloomberg Law)

New Bloomberg BNA Products, Policies, and Issues of Interest

New Customer Experience Team

There is a new customer experience team in place, dedicated to the customer experience across all of Bloomberg Law, rather than being channel-specific. It is designed to provide high-quality customer service to all users of Bloomberg Law, regardless of subscriber type. Based out of the Bloomberg Law home office in Arlington, Virginia, this team includes nine employees, each of whom has certain areas of expertise.

Product Enhancements

There are also three new enhancements to the Bloomberg Law platform to highlight, each of which is currently available to all Bloomberg Law subscribers.

- **Attorney Analytics** (came out around November 2018)
 - This enhancement is building on the already-available analytics for companies, law firms, and judges. The data underlying it is pulled from both dockets and case law and includes roughly 100,000 attorneys from 775 different law firms.
- **Points of Law**

- The Points of Law enhancement is an applied machine-learning tool, laid over all court opinions. It identifies critical language from opinions and allows users to view all the important points of law in an opinion without clicking through one-by-one.
- **Transaction Intelligence Center**
 - The Transaction Intelligence Center is a counterpart to the established Business Intelligence Center and Litigation Intelligence Center, but geared toward transactional legal work. It covers 15 discrete practice areas and has a practitioner tool tab offering practical guidance. There are a number of other transactional practice tools available in the Transaction Intelligence Center, including a chart builder.

Law School Migration

With respect to Law School Migration of content from the BNA Premier platform, there is some general information. As of December 31, 2018, the BNA Premier package for law schools will be sunsetted, with content already being available via Bloomberg Law instead. Recipients of Bloomberg Law news email alerts will be able to click through to three articles per email without having to log in to their Bloomberg Law account.

For academic users that had campus-wide access to BNA Premier, Bloomberg Law can be provided via IP range for the remaining duration of their BNA Premier contract (through the next renewal). This information should have been communicated already, but if interested parties don't have the offer information and are interested, they should contact Mike Bernier. Almost all ABA-accredited law schools subscribe to Bloomberg Law for all law students and law faculty members.

CRIV Requests for Assistance

There were multiple requests from each type of library, combined and organized primarily by library type to foster discussion, with a single universal issue listed first.

General Statements from Bloomberg Law

Bloomberg Law is unequivocally committed to becoming a digital-only platform in the near future. There is not a concrete date set for the complete move to digital-only, but it is not remote and the complete move should be expected within the next few years.

Supreme Court Today is available in PDF on Bloomberg Law. U.S. Law Week and other standalone news sources are also available for digital purchase independently of a subscription to the Bloomberg Law platform.

1. Universal Issue

It appears BBNA is adopting an electronic subscription requirement to Bloomberg Law (of a varying number of seats/access points) in order to purchase materials (specifically the Tax Management Portfolios (TMPs)) in print.

CRIV Questions

- **Is BBNA tying access to the TMPs in print to the purchase of a license or licenses to Bloomberg Law?**
 - **BL Answer:** Bloomberg Law's production and selling of Tax Management Portfolios (TMP) in print TMP is an accommodation exception for Bloomberg Law or Bloomberg
- **Tax online subscribers who also want to continue getting print TMPs. Access to print TMPs were offered as a convenience. Bloomberg Law is committed to continual updates to the TMPs, something only possible in the digital format but understands**

many subscribers need time migrating users to the digital platform. Is BBNA tying access to any other materials in print to the purchase of a license or licenses to Bloomberg Law? If so, which ones?

- **BL Answer:** For the moment, many BNA books can be purchased independently from Bloomberg Law. The ABA/Bloomberg BNA Manual on Professional Conduct is available in both print & electronic formats and can be purchased independently.
- **If BBNA is in fact tying access to print TMPs or to any other print resources to subscriptions to the Bloomberg Law product, why is it doing so?**
 - **BL Answer:** Bloomberg Law isn't aiming to sell TMPs (or any other individual titles) as stand-alone print resources, but instead marketing the Bloomberg Law platform in light of the move to digital-only. The existing TMPs are sold in print only to accommodate user demand at this point, while the shift to digital-only is not yet complete.

2. Law Firm Library Requests

Main Issues Raised

- Requirement of minimum seat purchase that exceeded the number of people in the firm's tax group (often more than double).
 - Specifically setting a floor of 15 licenses, when it is far more common (described as "industry standard") to have a 5-license minimum.
- Dramatic increase in cost of print Tax Management Portfolios in the coming year (over 200% increase) in addition to an increase to electronic Bloomberg Tax.
- Frustration with both the migration to practice centers and the notification/explanation (or lack thereof) accompanying those migrations.

BL Comment: Bloomberg Law acknowledges the frustration experienced during this migration. A concerted effort has been made to remedy this, revisiting thousands of customer accounts in 2018. The migration is nearly complete.

- Misrepresentation by representatives who initially claimed the TMPs were being discontinued in print when they came up for renewal, but then later offered print at a reduced price when negotiations for electronic began.
 - This misrepresentation has severely damaged the relationship between the rep and the firm, such that the firm librarian questions whether the 15-seat minimum is an absolute requirement from Bloomberg Law.

CRIV Questions

- **For law firm libraries, is there any way to purchase TMPs in print without subscribing to the Bloomberg Law platform?**
 - **BL Answer:** Yes, via Bloomberg Tax online subscription, provided that meets the “significant” digital presence.
- **If not, is there an absolute minimum number of subscribed seats to Bloomberg Law required for law firm libraries in order to purchase TMPs in print?**
 - **BL Answer:** “Significant” digital presence is the only requirement.
- **If yes, what is that minimum?**
 - **BL Answer:** It varies based on other subscriptions, market, and other factors.

BL Comment: There are two offerings for tax users: 1) Bloomberg Law: Tax, Practice Group License which is based on licensing, at a minimum, all attorneys in the full Tax practice group (if practice group attorney count is less than 15, there is a minimum of 15 users). The practice size is determined by researching and reviewing a combination of publically available information, third-party solutions, and customer feedback. 2) Bloomberg Law (which includes everything in Bloomberg Law: Tax and more), which is done on a designated user basis (no minimum, and no establishing of practice group), practice group license or firm wide license.

3. Public/County Law Library Requests

Issues Raised

- The requirement of online subscription as a prerequisite for purchasing the Tax Management Portfolios is problematic for most public/county law libraries.

- The associated jump in cost of access (with online and print together costing roughly two to three times as much total), especially when the AALL member really wanted only print.

BL Comment: Bloomberg Law is focused on its future as a digital business. It has made the deliberate choice to make investment in digital only, rather than as a publisher of print materials.

- Poor (“very deceptive”) communication concerning patron access to the TMPs. Only after pressing the representative for details that were not initially included revealed things like 1) patron access can only be at a dedicated terminal (as opposed to an IP range); 2) material cannot be downloaded or emailed by patrons; 3) staff cannot provide requested documents to patrons who are unable to visit the law library in person.

BL Comment: Bloomberg Law is receptive to discussion and improvement on this. Many of the limitations associated with the patron access terminal model are tied to the need for an individual username and password in order to download, print, save, and take advantage of the customization available to Bloomberg Law subscribers.

BL Comment: There are two standard access modes:

- Designated User Access mode, which consists of a username/password for given seats/users. Use is personal to the user and not for patron access.
- Kiosk mode
 - These have no individual username/password and leave no research trail
 - Patrons can print specific material being viewed on the screen.
 - Currently patrons cannot use the download center but Bloomberg Law is open to reconsidering that if it is something libraries feel would be helpful to patrons.
 - For public/county law libraries, Bloomberg Law is also open to discussing the possibility of a Kiosk-mode based on IP address, rather than just a single dedicated terminal.
 - The suggestion was made to the representative that a different pricing model might be

appropriate for libraries that circulate print materials to members of the public, perhaps as compared to firm and/or academic law libraries.

CRIV Questions:

- Have you considered modification to the pricing model, specifically for public/county law libraries, or doing away with the online subscription requirement? Based on the requests for assistance, it seems they are placed in a particularly untenable position under the current pricing model/subscription requirement used for them.
 - **BL Answer:** Bloomberg Law is willing to work with public/county law libraries on this issue and is open to developing a modified pricing model.
- Are there options available to public/county libraries who would like to provide access to TMPs for their patrons at a similar level to that which they could in the past (for example, downloads/emails; electronic access in different areas of the library (not just one terminal); delivery of materials to patrons unable to visit the library in person)? If so, what are they?
 - **BL Answer:** Bloomberg Law is willing to work with public/county law libraries on this issue and help determine what options may help serve patron needs effectively.

4. Academic Law Library Requests

Issues Raised

- Lack of PDF versions of the BNA Law Reports that have been discontinued (or have been identified as being discontinued) in print.
 - The new platform poses challenges for citation by faculty members who seek to use material previously found in BNA Law Reports as part of their scholarship.
 - Develop working group to come up with approach to move forward (rather than just past)
- Poor communication of the changes to the BNA Law Reports and Bloomberg Law.

- Cessation notices followed by additional materials (e.g., Corporate Counsel Weekly; Corporate Practice Portfolio Series, and others).
 - This creates additional work and confusion on the part of staff that work with acquisitions and/or serials.
 - Requests for clarification do not yield useful/reliable/concrete information.
 - Notices indicated that a Bloomberg BNA representative would contact the AALL members, but there is no such communication unless initiated by the member and any answers given were unhelpful.
- Inconsistent, and sometimes contradictory, information given on which BNA Reports will continue, to which date, and whether equivalents (in PDF or not) will be available in Bloomberg Law.
- Migration from IP-based University-wide access on the BNA Premier Platform to individual username and password (generally limited to law school students/faculty).
 - At least one Law Library Director was able to secure campus-wide Bloomberg Law IP authentication at no additional cost for the duration of the existing BNA Premier license, but only after reaching out. That person was also offered the option of a refund if Bloomberg Law IP access for the rest of the contract period was not desired. All this occurred, however, only after the Director reached out and it is unclear how widely this option has been made known (or is even, in fact, available).

CRIV Questions

- **Why were/are some print BNA Law Reports continuing to be produced and distributed even after the effective date of cessation notices pass?**
 - **BL Answer:** These continued publications were anomalies and should not continue.
- **Which BNA Law Reports, if any, will continue to be produced in print?**
 - **BL Answer:** There will be no BNA Law Reports produced in print, beginning in 2019.

- **BL Answer:** Only the Supreme Court Today and ABA/BNA Lawyers' Manual on Professional Conduct will have PDF versions available moving forward. An archive of existing PDFs will be maintained for all BNA Law Reports.
- **Which BNA Law Reports are ceasing without any substantially similar electronic access to the information?**
 - **BL Answer:** The Family Law Reporter, Real Estate Industry & Law Report, and Money & Politics coverage have no Bloomberg Law counterparts.
- **Will MARC records be provided for the Bloomberg Law titles/material that used to be on BNA Premier? If so, how should members request those records to get them as efficiently as possible?**
 - **BL Answer:** Yes, complimentary MARC records are available. Please see www.bna.com/marcrecords. If you would like to be added to the distribution list for updates, please contact Mike Bernier.
- **For those with existing BNA Premier IP-based subscriptions, can Bloomberg Law subscriptions be substituted at no additional cost?**
 - **BL Answer:** Yes. For academic users that had campus-wide (access to BNA Premier, Bloomberg Law can be provided via IP range for the duration of the BNA Premier contract (through the next renewal) at no additional cost. For more information, contact Mike Bernier.
- **For those with existing BNA Premier IP-based subscriptions on a campus-wide basis, how should a refund be requested for the time frame covered by the contract once BNA Premier ends on 12/31/2018?**
 - **BL Answer:** If IP access of Bloomberg Law is not desired, libraries can notify their reps and request a refund of a pro-rated portion of the campus-wide contract cost.
- **What is the cost for a Bloomberg Law IP-based subscription, for those academic libraries that would like to continue to provide (as they did with BNA Premier) access to these materials for their entire university?**
 - **BL Answer:** After the current BBNA contract expires, IP-based access to Bloomberg Law is based on the total FTE for the University (4 bands based on university-wide FTE.)

CRIV / THOMSON REUTERS BIENNIAL CALL

Date: November 9, 2018

Participants: Caroline Walters (Harvard University, CRIV Liaison), Lori Hedstrom (National Manager, Information Management Advisors, Thomson Reuters), Rachel Torgerson (Customer Success Strategist, Finance Group, Thomson Reuters), Jeff McCoy (Communications, Thomson Reuters) & Vani Ungapen (Executive Director, AALL)

Notes submitted by Lori Hedstrom

Issue: Accounts Receivable – Dunning notices, timeframe for communications

Caroline submitted several member questions and comments regarding individuals' experiences with their accounts. We are unable to address each one individually on this platform, but we can share information about how the system works so customers know the timing and processes at work.

Our systems are based on the net 30-day model and please understand that notices are automatically generated based on activity in the account, or lack thereof. There may be times when customers pay the majority of an invoice, but a partial amount may still be outstanding. Our system shows that residual amount as unpaid and generates a notice. Customer Service can walk customers through the system, with specific information on when their invoices are generated, when they are mailed, and

when customers should expect to receive them each month.

Regarding copying directors and others in administration, dunning notices come out of our system addressed to the contacts listed. If the technical services librarian, the library director, and the dean are listed, they each will receive a copy. It is difficult to say why each individual was added—sometimes an administrator wants to know if payments are not being made timely and asks to be notified, or a librarian is promoted but not removed from the notification, as examples. If customers desire to remove contacts from the systems, they should work with their account manager to contact the Credit Management Team to ensure the appropriate contacts are in the system. Here is the general contact information for the Credit Management Team at Thomson Reuters for US Legal:

- **Email:** WestAccountsReceivable@thomson-reuters.com
- **Phone:** 1.800.522.0552
- **Fax:** 651.687.4601

Issue: Westlaw Edge Rollout Questions

Q: When will “regular” Westlaw sunset? For firms? For academics?

A: For the academic community, January 1, 2019, is the date academic institutions will switch to Westlaw Edge. For law firms, we currently do not have a “sunset” date for Westlaw, but that will likely be around 2025.

Q: Will firms be able to choose between Westlaw and Westlaw Edge at renewal or for new customers?

A: Yes. Firms may choose between Westlaw or Westlaw Edge, but accounts will only have Westlaw or Westlaw Edge, as adoption is organization-wide.

Q: Can academics have access to both platforms for pedagogical purposes? There is concern among law schools that their students will only know how to use Westlaw Edge. Many of them may get jobs in firms that don’t have Westlaw Edge.

A: Students, similar to legal professionals that may change organizations, will still be able to use and benefit from Westlaw if their employer has yet to

upgrade to Westlaw Edge. They may notice some of the efficiency tools such as the advanced search and analytics capabilities are not included, but they will still be able to conduct their legal research on Westlaw without disruption or feeling as they have to learn a new system.

Q: What if a professor is at a school that was an early adopter of Westlaw Edge and needs to grade their students’ work on Westlaw. Can they have access to Westlaw?

A: If a professor has transitioned to Westlaw Edge but needs to grade on Westlaw, the professor can reach out to the Academic Account Manager and request a temporary password to get through this semester. Thank you as always for the opportunity to meet and talk through members’ concerns. Please let me know if you have additional questions.



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