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Happy New Year and happy new decade! In this issue of *The CRIV Sheet*, you will find an article reviewing programming from the AALS Annual Meeting. Maria Del Carmen Deans shows how libraries can work with vendors (such as Wolters Kluwer) to request MARC (MAchine-Readable Cataloging) records for individual titles in a database. Charlie Perkins takes us on an exploration of deepfakes. Ashley Ahlbrand provides a descriptive analysis of the litigation analytics products in Bloomberg Law, Westlaw Edge, and Lexis Advance. Finally, the issue concludes with minutes from three vendor semi-annual calls from LexisNexis, Thomson Reuters, and Wolters Kluwer. These vendor calls can be found on the *CRIV Blog*, which contains weekly stories and information relevant to the relationship between the law library profession and legal information vendors.

*The CRIV Sheet* is produced by the Committee on Relations with Information Vendors, and our intent is to provide valuable articles for all AALL members. To that end, we welcome articles, ideas, or other feedback from the AALL membership to make these issues the most useful they can be. Please feel free to reach out to either of the co-editors, or any member of *The CRIV Sheet* subcommittee with your thoughts and ideas. We are already seeking out authors for the next issue, so if you have a topic you would like to explore, please reach out. We hope you enjoy this issue!
Welcome to the first issue of The CRIV Sheet for 2020. As the new year begins, the editors of The CRIV Sheet have a great issue for you, complete with minutes from three recent semiannual calls, a review of the recent American Association of Law Schools meeting, and original pieces comparing legal analytics tools on Bloomberg Law, Westlaw Edge, and Lexis Advance. Authors also explore deepfakes and discuss the importance of title-level MARC records to increase discoverability of database content. Don't forget to keep an eye on the CRIV Blog as well, where you can learn about interesting news from around the web and get a first chance to see vendor call minutes.

The Committee on Relations with Information Vendors has been particularly busy this year with Requests for Assistance, and we're happy to be able to act as a conduit between vendors and AALL members. Please continue to let us know if we can assist you by completing the request form.

Programs for the 2020 AALL Annual Meeting are being finalized, and there seem to be a lot of great options on tap. Keep an eye out for the next issue of The CRIV Sheet, where CRIV will preview some of the AALL Annual Meeting programs that we think will be of great interest to our readers.

Enjoy the issue!
The Annual Meeting of the Association of American Law Schools (AALS) was held January 2-5, 2020, in Washington, DC. While a number of programs were ticketed as “hot topics,” the loudest buzz, by far, seemed to pertain to the new HeinOnline-US News partnership to create a scholarly impact ranking based on faculty citation metrics in Hein’s Law Journal Library. Several programs at the meeting revolved around this new measure. The AALS Hot Topic Program on the new ranking, held Friday morning, was so popular that even standing room only filled up, and several of us were left in the hallway. I am told the session was recorded, for those who would like to listen. Fortunately, the section on Law Libraries & Legal Information held a follow-up program, “Measuring Scholarly Impact: Are Citation Metrics the Right Fit for Law Schools?” on Saturday, January 4th. Janet Sinder moderated a panel that consisted of Shane Marmion from HeinOnline, Gregory Mitchell from the University of Virginia (UVA), Bonnie Schucha from the University of Wisconsin (UW), and Gregory Sisk from the University of St. Thomas. The panelists discussed the new scholarly impact ranking and the likely impact it could have on law faculties.

Marmion gave an overview of Hein’s Author Profiles and the citation data they provide, as well as a preview of enhancements to come, including a portal that librarians will be able to use to better interact with their institution’s author profiles. Sisk discussed his research on citation metrics and compared and contrasted his Sisk-Leiter ranking to the planned U.S. News impact ranking.

Mitchell, a professor at UVA, identified several potential issues with the implementation of this new ranking. First, there is a concern that the rankings can be manipulated through increased self-citation and the creation of “citation cartels,” where certain groups of faculty cite each other disproportionately more than others, even at the expense of citing to more relevant content. Another problem that may arise is that of representation, where schools may look for ways to remove low-cited faculty from their measured faculty lists or look for ways to create tenuous relationships with highly-ranked scholars in order to add them to their faculty lists and boost their overall impact ranking.

Schucha rounded out the discussion by relaying a study she conducted of UW faculty’s scholarly impact, concluding that the HeinOnline data woefully underrepresents the scholarship of Wisconsin’s faculty, who, like many institutions, tout themselves as being largely interdisciplinary. She then conducted a separate study of the faculty, pulling in additional non-law journal data from Web of Science and Google Scholar, and found this to be much more representative.
LAW SCHOOL RANKINGS: A CONVERSATION AND Q&A WITH ROBERT MORSE AND KELLYE TESTY

The rankings conversation resumed again on Sunday, with a Law School Admission Council Program that offered a broader sweep of the law school rankings, but the open audience questions again focused primarily on this new scholarly impact ranking. When asked about the motivation behind the new ranking, Morse stated that the metric would be important to students; when he was pressed further on this, however, he noted that they had not surveyed students or other consumers, and had not conducted any other research to support this notion. Rather, as he indicated in a statement at the time the new metric was first announced, U.S. News views this as another means of measuring the quality of a law school’s faculty, and “[p]rospective students are looking for schools with the highest quality law school faculty who are making an impact in legal academia and the law.” There has been strong reaction to this new ranking since it was first announced, particularly around how to accurately measure ‘impact’, which seems, at best, only partially measured by mere citation counts. Regardless of your thoughts on the new metric, the first iteration of this ranking is expected to be released sometime this year. With that inevitability, I think we can expect this hot topic to remain hot for quite some time.

TURNING FEE INTO FREE: STRATEGIES AND SUCCESS IN DEMOCRATIZING ACCESS TO LAW

Panelists: Todd Melnick, Fordham University School of Law; Tom Gaylord, Northwestern University Pritzker School of Law; Adam Ziegler, Harvard Law School; Rebecca Williams, DC Legal Hackers; Kirsten Gullickson, Office of the Clerk, U.S. House of Representatives; Barbara Bavis, Law Library of Congress

The section on Law Libraries and Legal Information’s final program of the meeting was held Sunday afternoon. “Turning Fee into Free: Strategies and Success in Democratizing Access to Law” touched on another hot topic in law libraries: open access (to justice). Panelists ranged from academic law libraries to government offices to legal hackers, each with a fee-to-free story to share. Barbara Bavis from the Law Library of Congress spoke about the latest enhancements to Congress.gov. Kirsten Gullickson, from the Office of the Clerk to the U.S. House of Representatives spoke about uscode.house.gov and USLM, the mark-up language they use to make the U.S. Code more accessible. Adam Ziegler of Harvard Law’s Innovation Lab discussed several of their ongoing projects, including Perma.cc and Harvard’s case law digitization efforts. Tom Gaylord from Northwestern discussed an ongoing project and partnership they are involved in to make PACER records accessible and discoverable for researchers. Todd Melnick from Fordham Law rounded out the panel, discussing his library’s efforts to support a project to make parole records traceable and discoverable. The panelists emphasized the importance of supporting these types of projects, and the benefits they have for litigants, researchers, and beyond. Discussion from the audience highlighted one critical issue to address when tackling this type of project: privacy. How do we balance the need to protect parties’ privacy with our push for open access? Melnick, for instance, noted that they carefully redact all parole documents in their project and create a unique code for each party in those documents. That way parties’ privacy remains intact, but researchers can still follow a distinct party anonymously through the parole process.
*This article relays a case study between Harvard Law and Fordham Law.

Content is only valuable if the person who needs it can find and access it easily. Wolters Kluwer is helping law school libraries at Harvard, Fordham, and dozens of other universities make it easier for every student, faculty, and scholar to find the right materials they need.

**Advocating for MARC records for Wolters Kluwer Titles**

Developed by the Library of Congress in the 1960s, MARC, which stands for MAchine-Readable Cataloging, is a computer-readable format for bibliographic records that enables library users to digitally search a library’s catalog. However, if a title doesn’t have a MARC record available for it, library users can’t find it in the digital catalog.

This was the situation for the titles on the Cheetah legal research platform from Wolters Kluwer that libraries make available to their users. Although users had direct access to Cheetah, with its advanced browsing and searching capabilities, they could not locate the same titles and content directly within a library’s catalog. “If someone was doing a keyword search in the catalog, they did not see search results that included content in Cheetah,” says Caroline Walters, collection development librarian for the U.S., and the materials budget at Harvard Law School Library.

“Advocated that publishers provide MARC records for their resources. This increases the accessibility to users and increases the return that libraries receive for their investment into these resources.”

“Our reference librarians will tell you how overwhelmingly important it is to have MARC records in the catalog,” says Yael Mandelstam, associate librarian for technical services at Fordham Law School Library.

Walters and Mandelstam are both members of AALL’s Vendor-Supplied Records Advisory Working Group (VRAG). They combined their voices with those of other universities participating in VRAG to request MARC records be created for Wolters Kluwer titles, which would make legal content more easily searchable and discoverable.

**Making Titles Discoverable from the Library Catalog**

Working closely with VRAG, Wolters Kluwer introduced MARC records and MARC Records Manager free of charge for all titles available on its digital platforms, including Cheetah and IntelliConnect. MARC Records Manager makes it easy to manage MARC records for any Wolters Kluwer titles for libraries with a subscription.

Now students, researchers, and faculty at Harvard Law School, Fordham Law School, and others can discover any of Wolters Kluwer titles within the library’s catalog system. Today, there are already 39 schools using MARC records for their Wolters Kluwer titles.

**Improving the Discoverability of Valuable Content at Harvard**
“When someone is researching in the catalog, they can go directly to the title in Cheetah, which is far more efficient than before,” says Walters. “Alternatively, our research librarians can include a proxied link from the MARC record when creating a LibGuide for students for specific subjects, which also helps people find and access content in Cheetah.” Faculty members can also provide links to Cheetah titles directly to students.

For the Harvard Law School Library, the availability of MARC records for digital content is fast becoming a mandatory requirement. “If a publisher doesn’t offer MARC records, our message to them now is come back when you do,” says Garewal. “It doesn’t make sense to spend money on content that people can’t find.”

Walters agrees: “It’s imperative that content is discoverable. We’re very grateful to Wolters Kluwer that we’re now able to make it easier and faster for people to find the content they need using our catalog.”

Expanding Content Usage at Fordham

At Fordham Law School, the Maloney Library staff believe that MARC records help them fulfill their mission of supporting the scholarship of faculty and students by making access to legal information easier. Since MARC records were loaded into the library catalog, 30 percent of Fordham University Law Library usage of Wolters Kluwer titles now originates from MARC records.

Mandelstam appreciates the responsiveness and patience Wolters Kluwer has shown in working with the law library community on MARC records for Cheetah titles. “Wolters Kluwer continues to work with catalogers to improve the quality of their records,” she says. “While it’s difficult to know whether better-quality records will increase usage, Fordham’s analysis suggests that it is worth the effort to continue partnerships with VRAG and other catalogers in order to improve standards and increase discovery.”

ANALYZING ANALYTICS: LITIGATION ANALYTICS IN BLOOMBERG LAW, WESTLAW EDGE, AND LEXIS ADVANCE

ASHLEY AMES AHLBRAND
INTERIM DIRECTOR, JEROME HALL LAW LIBRARY
INDIANA UNIVERSITY MAURER SCHOOL OF LAW

One of the hottest trends in legal research platforms today is legal analytics. This term can be applied to a number of different analytic measures, such as Ravel Law (now Ravel View on Lexis), with its graphical display of case law search results that map the citation relationships of cases in your search results; or Lexis’ Search Term Maps that provide a colorful display of where and how frequently your search terms appear in each search result. This article will look at another facet of legal analytics—litigation analytics—that now appear in Bloomberg Law, Westlaw Edge, and Lexis Advance—each offering similar, yet unique, analytics products.

What They Have in Common
The areas of overlap between all three analytics products to date are Judge and Court analytics; but even within these areas, the products differ slightly in what measurements they offer.

**Court & Judge Analytics**

Bloomberg Law’s court and judge analytics are limited to Federal District Courts. When you pull up a particular district court or judge, Bloomberg Law provides analytics by Motion Outcome, Appeal Outcome, Length of Case, and Appearance & Case Type. Looking first at Motion Outcomes, you can filter your results by Motion Type (Motion to Dismiss, Summary Judgment, or Class Certification), Motion Outcome (All, Granted, Denied, or Granted/Denied in Part), Date (up to the last five years), and Legal Topic (over 70 options, you can select up to three). Under Appeal Outcomes, you can filter your results by Appeal Outcome (All, Granted, Reversed, Granted/Denied in Part), Date, and Legal Topics. Under Length of Case, you can filter your results by Case Type (over 80 options, you can select up to five). Finally, under Appearance & Case Types, you can filter by date (2007 - present, or the last 1, 3, or 5 years), Case Types, Law Firms, Attorneys, and Companies (up to three each). A unique feature of Bloomberg Law’s court and judge analytics is the ability to compare analytics against other courts or judges. For example, you could compare the rate that a particular judge grants motions for summary judgment as compared to other judges in their district or others, or the court as a whole.

Westlaw Edge’s Court and Judge Analytics, similar to Bloomberg Law, are more robust when researching the Federal District Courts. Unlike Bloomberg Law, however, Westlaw Edge does give you some information for other federal courts, as well as state, but is limited to docket information and expert challenges. Focusing on the Federal District Courts, Westlaw Edge provides analytics in four areas: Dockets, Outcomes, Motions, and Expert Challenges. Within Dockets, you can filter by Case Type (22 options), Judge, Party, Law Firm, Attorney, and Date. Within Outcomes, you can filter by Case Type (19 options), Outcome (settled, uncontested dismissal, dispositive motion, other, docketed elsewhere, or verdict), Judge, Party, Law Firm, Attorney, Role (defendant, plaintiff, respondent), Date, and Time to Outcome. Within Motions, you can filter by Motion Type (26 options), Case Type (21 options), Motion Outcome (granted, denied, granted in part, denied as moot, struck, vacated, or withdrawn), Case Event (response, brief, reply, sur reply, memorandum, opposition, or oral argument), Filing Role (defendant, plaintiff, respondent, other, appellant, appellee, movant, or creditor), Judge, Party, Attorney, Filing Law Firm, and Order Date. As with other areas of Westlaw Edge, you can also Search within Results within any of these analytics to narrow your dataset.

Within judge analytics, Westlaw Edge includes additional analytic measures for Precedent, Appeals, and References. Precedential analytics is one of the newest features of Westlaw’s product, looking at the judges and opinions a particular judge cites most often in their rulings, as well as the legal issues they have dealt with in highest frequency. The Appeals tab allows you to see both how often the judge’s opinions have been appealed, the results of those appeals, and frequency over time, as well as cases that have been appealed to that judge, again by type, results, and date. The References tab provides a list of all documents within Westlaw that refer to the judge, from cases and court documents to secondary sources and dockets.

Similar to both Bloomberg Law and Westlaw Edge, Lexis Context’s court and judge analytics are most robust for the federal district courts. You can see citation patterns for state appellate and other federal courts, but motion language is only available at the federal district court level. Analytics offered for a federal district court or judge are related to Motion Language and Citation Patterns. Within Motion Language, Context provides data on 100 different types of motions, showing how often each has been granted, denied, or partially granted or denied. You can filter the results
by keyword, practice area, or date. Prior to Westlaw’s release of Precedential Analytics, Context was already offering citation pattern data, for both judges and courts. Citation Patterns show which case opinions or judges a court or judge most frequently cites, as well as the specific language most commonly cited. You can filter here by keyword, motion type, practice area, or date.

**Partial Cross-Over: Law Firm & Attorney Analytics**

Both Bloomberg Law and Westlaw Edge offer attorney and law firm analytics as well. When you look up a law firm or attorney in Bloomberg Law, you can filter by Company (i.e., the companies the firm represents), Attorney (law firm analytics only), or Case Type, Jurisdiction, and Litigation History. You can view results from 2007 to present, or restrict to the last 1, 3, or 5 years.

Westlaw Edge’s law firm and attorney analytics provide data on Dockets, Outcomes, and Motions. Within Dockets, you can filter by Case Type (30 options), Court, Role (15 options), Parties, Attorney, Office Location, Judge, and Date. Attorney analytics also include Dockets, Outcomes, and Motions, with very similar filtering options. Here you also get a References tab, where you can see a variety of documents that have referenced that particular attorney, including Cases, Court Documents, Secondary Sources, Arbitration Awards, and Dockets.

**Partial Cross-Over: Expert Witness Analytics**

A stand-out feature of Lexis Context is the ability to generate analytics on expert witnesses. You can search by expert witness name or area of expertise. Once you select an expert to view, the Overview page tells you how many cases the expert has participated in, whether hired as an expert for the plaintiff, defense, or other, the number of cases they have appeared in by year, and their experience by area of law. The Analytics tab further provides information on the times the expert has been challenged in court, the outcome of those challenges (admitted, excluded, admitted/excluded in part), and the types of challenges that have been raised (methodology, qualification, relevance, or procedural). Finally, the Documents tab provides a list of all documents in the Lexis system that mention the expert, everything from cases and court documents to directories and news.

While Westlaw’s Litigation Analytics does not appear to have a standalone search for expert witness analytics, when searching court analytics, an Expert Challenges tab appears. There, you can analyze expert witness challenges of that court by area of expertise, case type, judge, or year.

**Unique Features**

**Bloomberg Law: Company Profiles and Litigation Analytics**

By virtue of its origins, a particular strength of Bloomberg Law has always been its company data. It comes as no surprise, then, that one standout feature of Bloomberg’s analytics are Company Analytics. These come in two flavors. First, within Litigation Analytics, you can view analytics by company. For example, you can look up the profile for a particular company on Bloomberg Law to dig further into the business side of their data as well.

**Westlaw: Analytics by Case Type**

Unique to Westlaw’s Litigation Analytics are analytics by case type. If your research is focused on specific types of cases, rather than the litigation of a particular firm, attorney, or judge, Westlaw offers interesting insight. For example, if you were interested in patent cases, you could search by this case type in Westlaw’s Litigation Analytics, and view Docket, Outcome, and Motion data. This would tell you the number of
DEEPFAKES, CHEAP FAKES, AND THE INFORMATION PROFESSIONAL

CHARLES PERKINS
HEAD OF PUBLIC SERVICES
TEMPLE UNIVERSITY BEASLEY SCHOOL OF LAW

Many people have become concerned about the proliferation of Deepfake videos. A year ago the editorial board of The Washington Post ran a headline for its “The Post’s View” opinion column declaring “A Reason to Despair About the Digital Future: Deepfakes,” and CNBC recently ran an article naming Deepfakes one of the two “major cybersecurity threats in 2020.” As information professionals, it is important to understand what Deepfakes are, and what resources are available to deal with them.

Faked videos are nothing new. Hollywood is adept at mixing movie magic with the latest technology to trick us into seeing things that did not happen, be it inserting Tom Hanks as Forrest Gump into old news footage or Star Wars using existing footage of the late Carrie Fisher to create one last Princess Leia performance. So, what are Deepfakes, and what makes them different? According to a report by Deeptrace, an Amsterdam-based company combatting artificial intelligence (AI)-generated fake media, in late 2017, a Reddit user operating under the pseudonym u/deepfakes created a forum on Reddit to develop and use software that would use deep learning principles to create doctored videos. These videos normally involved swapping the face of a female celebrity onto the body of a performer in a pornographic movie. Hollywood movies are created at great expense by teams of professionals; Shirley Li wrote for The Atlantic about how it took 500 artists two years working on the processes used to de-age Will Smith for Gemini Man. These new Deepfake videos, and the codes used to
create them, are freely shared in open source communities such as Github or Reddit, making the technology widely available.

In a demonstration of the accessibility of this technology, Timothy B. Lee, writing for *Ars Technica*, documented his first attempt at creating a Deepfake video, a 37-second video swapping the face of *Star Trek’s* LCDR Data (Brent Spiner) onto footage of Mark Zuckerberg testifying before Congress. The video cost only $552 and took just two weeks to make. Lee was able to create his video using Faceswap, an open source software with detailed tutorials and community support online. Other than his time, the major expense he discussed was renting cloud computing time to gain access to more processing power, allowing him to speed up the creation of the video.

As public consciousness of Deepfake videos has grown, it has brought attention to a wide range of deceptive practices involving videos, sometimes referred to as Cheap Fakes. One notable recent example of the effectiveness of Cheap Fakes was a May 2019 doctored video of Nancy Pelosi. The video was slowed down, but the pitch of her voice was corrected back up so that it sounded like she was slurring her words, a process forensics expert Hany Farid told Audie Cornish on NPR’s *Fresh Air* was something “the average person would be able to do....” In their report, “Deepfakes and Cheap Fakes: The Manipulation of Audio and Visual Evidence,” Britt Paris and Joan Donovan provide a continuum of manipulative practices, ranging from presenting a video without its proper context to using lookalikes, changing the speed of the video, face-swapping, all the way up to virtual performances. Paris and Donovan suggest as a dividing line between Deepfakes and Cheap Fakes is the use of machine learning by Deepfakes.

Given the ability of videos to be manipulated in a variety of ways, what resources are available to combat the spread of disinformation? Researchers have been working to create automated detection systems to identify faked videos.

One approach is to have an authentication system running while the original video is being recorded. Lily Newman, writing for *Wired*, profiled a product that uses this approach, Amber Authenticate. This tool inserts, at user-specified intervals, blockchain hashes into the video. If the video is manipulated, the hashes in the new video will not align with the blockchain ledger for the original video, alerting the user to manipulation. This type of system is being looked at in areas such as police body cameras and CCTV, where the creators of the video have an interest in creating a record to verify that the original video has not been manipulated.

Writing for *MIT Technology Review*, Karen Hao provides information on two start-ups that are taking different approaches to image verification. Truepic, a U.S.-based start-up, and Serelay from the United Kingdom both have applications users can install on their mobile device that applies an algorithm to verify the image when it is taken. Where the systems differ is that Truepic stores a copy of the authenticated original on its servers so that later versions of the picture can be compared to the authenticated original. Serelay, rather than upload the entire file to a server, takes a sampling of mathematical values from the image to create a unique digital identification that the company claims to be sufficient to detect if a single pixel has been manipulated.

Deeptrace, a start-up based in Amsterdam, is attempting to create a program that will run in the background searching for manipulated videos that may show up online. Writing about Deeptrace in *IEEE Spectrum*, Jeremy Hsu describes the company’s efforts to employ the same type of machine learning used by the creators of Deepfakes to identify manipulated videos.

The large tech giants Facebook and Google have also joined the effort to detect manipulated videos. Both companies hired actors, filmed them, and then experimented with creating fake videos with the footage. Both have announced their willingness to share this information with researchers working on fake video detection systems. Facebook, in cooperation with Amazon, Microsoft, as well as eight universities and the Partnership for AI, has launched the Deepfake Detection Challenge to encourage the development of automated detection systems for manipulated media. The U.S. government is also working to foster and encourage automated detection systems, with both the Intelligence Advance Research Projects Activity and the Defense Advanced Research Projects Agency providing substantial support in terms
of grant money to researchers working to counter Deepfake activity.

While the development of automated tools to detect Deepfake videos is impressive, resources that educate the information user about manipulated media will also play an important role in the response to this challenge. Reuters, with sponsorship from Facebook’s Journalism project, has launched an online course titled “Identifying and Tackling Manipulated Media,” available in English, Spanish, French, and Arabic. While the course is designed to educate journalists about manipulated media, it is freely available online for anyone to use, and can be completed in 45 minutes according to Igor Bonifacic at Engadget. Sara Fischer from Axios reports that Facebook is planning on spending six figures to fund the course as it expands internationally.

Deepfakes, manipulated media, and fake news in general will continue to complicate the information landscape. Information professionals will need to work to ensure their organizations are prepared to respond to these challenges. Start-up companies are beginning to bring media verification tools and systems to automatically flag doctored media to market. While these technology tools will play an important role in the response to manipulated media, it is critical to stress the importance of user awareness, as no type of media is free from the threat of manipulation.

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 the most recent calls with LexisNexis, Thomson Reuters, and Wolters Kluwer.

CRIV/LEXISNEXIS SEMIANNUAL CALL

Date: December 2, 2019

Participants: Carolyn Bach (Senior Manager, Librarian Relations and Faculty Programs); Autumn Boyer (Director of Segment Management); James Oakes (Segment Manager); Vani Ungapen (Executive Director, AALL) & Karen Provost (CRIV Board, LexisNexis Liaison)

Requests for Advocacy

Although there were no formal requests to CRIV, AmLaw 200 firms still question why they are unable to renew Law360, Courtlink, AmLaw products and print materials separately without subscribing to Lexis Advance. Here is the response from Lexis:

While we understand that firms initially had questions about how the products are related, Lexis has made substantial progress integrating the user experience across numerous products since 2018. As of today, LexisNexis Patent Optimizer®, Intelligize®, LexisNexis® Dossier, TotalPatent®, Nexis Diligence™, and Nexis Newsdesk™ have been moved off standalone platforms and on to the Lexis Advance® platform for single ID access, links between products, and back-office administration. Near-term plans include integration of CourtLink® and Law360®, along with considerably more interconnectivity between products. Customers tell us that the integration has materially improved their experience across products, rendering some former platforms unusable without integrated permalinks to Lexis Advance and other products. Customer feedback continues to drive our integration plans, and we encourage members to follow-up with their LexisNexis account representative with any questions regarding their firm’s specifics. Read more details on product integration in the section below.

Product Integration

• Integrating our products into a single platform to facilitate administrative convenience and research efficiency remains a top priority.
• In 2019, we concluded the legacy system decommissioning effort, and successfully integrated Patent Optimizer, Intelligize, Dossier, TotalPatent, Diligence, and Newsdesk into the Lexis Advance
Platform. All of this allows users to seamlessly move between more products.

- In 2019, we upgraded the bulk of our CourtLink customers to the integrated Lexis Advance version, and the remaining customers with complex setups and custom integrations will be upgraded in 2020.
- In 2020, we plan to integrate Law360.
- Also, in 2020, we plan to introduce to the Lexis Advance platform a web-based version of LexisNexis CaseMap® (currently software based). This will allow for significant integration between Lexis Advance and this trial management tool in the future.

Lexis Advance

- Streamlined Lexis Advance User Interface released in August 2019 is increasing ease of use. It also includes enhancements to filtering by court and relocation of Browse functionality to Explore Content with new Find a Source and Find a Topic tabs. The result is a streamlined home page that's easier to navigate.
- Lexis Answers: We also continued to enhance our Lexis Answers offering, adding Expert Witness cards and providing links to CVs and other relevant materials including links to Context and Lex Machina in judge and expert witness answer cards, where applicable.
- Ravel View enhancements: In early December, a visual refresh to the Ravel View display on Lexis Advance improved accessibility for some visually impaired users and made the data and navigation easier.
- India and Malaysia primary law were added to Lexis Advance.
- Alerts Manager: first iteration released. This tool facilitates firm-wide alert and track management by firm Administrators across all Lexis Advance products.
- Lexis Advance CourtLink: initial wave of migrations from CourtLink to the Lexis Advance platform provides a more streamlined docket solution. This industry leading docket coverage and robust alerting and tracking are still key components of the tool and are now easier to use and learn than ever before on the Lexis Advance platform. Hopefully, this relieves some of the burden from information professionals by allowing attorneys and other researchers to use the product on their own without much in the way of special training.
- In Large Law, primary law materials accessed are now $0 from a billback perspective. This change was made based on customer feedback.

Context

- The Court module was launched, building further on the Judge module, and allowing attorneys to understand which language is most persuasive in a given court; determine the success rate of over 100 types of motions by court, and more.
- Users can now share a summary version of the Context report with their clients, co-counsel, etc.
- The Company module is currently in early testing and will allow users to understand corporate structure, financials, leadership, news coverage, and litigation history in a single interface. This module will be attractive to both litigators and business development professionals.

Lexis Practice Advisor

- Evolving Guidance: Lexis Practice Advisor and Law360 have been integrated in an innovative and extremely useful way, allowing attorneys and researchers to gain end-to-end coverage of editorially selected issues, from the first news stories to the relevant forms needed to practice law surrounding those issues.
- Deeper integration of Intelligize and LPA allows for “deal point” searching on substantive contract terms in M&A agreements.
- State Law Comparison Tool: Updates and additions to the state law comparison tool continue.
- Expert forms on Lexis Practice Advisor are easier to export to Word and the alternate clauses and drafting notes our customers love now appear in-line
in the document making them easier to understand and employ.

• Core Documents are now surfaced immediately in several practice areas, allowing users to quickly identify the most useful and most used forms, check-lists, etc.

Lexis Newsdesk

Recent Enhancements

• Integration with Lexis Advance: access with Lexis Advance ID
• RSS Privatization and naming (Firm added RSS feeds visible to firm only)
• Ability to export Newsletters and share via other internal channels (e.g., intranet)
• Ability to receive newsletters through mobile app
• Sharing Newsletters externally (e.g., to a client) is now available via a subscription amendment
• Newsdesk Quick Search: new guided search template default for new users

Coming Soon

Lexis Advance

• New products and tools in development: Statutes Compare tool, a brief analysis tool, AI-enabled research tools and forthcoming additions to Context. These tools are all still in development and we look forward to sharing information with you about all of these and more in 2020.

CRIV/THOMSON REUTERS SEMIANNUAL CALL

Date: Monday, December 16, 2019

Participants: Deborah Heller (CRIV Thomson Reuters Liaison); Kim Hurley (Information Management Advisor at Thomson Reuters); Rachel Torgerson (Customer Success Strategist at Thomson Reuters) & Vani Ungapen (AALL Executive Director)

Agenda

• Introductions
• Discussion of direction of the phone calls moving forward. Deborah expressed an interest in having the calls address outstanding advocacy issues, provide an overview of any updates to Westlaw and/or Practical law, and continue ongoing discussions of billing issues worked on with Caroline Walters, the previous CRIV Thomson Reuters liaison.
• Kim said she could share the quarterly product updates with Deborah, who will then share information with members. Normally, Thomson Reuters tries to provide the update information in person to customers.
• One request for assistance was shared. The customer reported that Practical Law charges are appearing in Quickview as chargeable even though they are supposed to be non-billable. The problem is apparently not immediately obvious unless you are spot-checking a specific charge, so it is possible that firms may have been billing clients for something that should have been free. The problem was reported to a client relations manager, who has reported that Thomson Reuters is aware of the issue.
• Rachel took notes of this problem and will look into the issue.
• Rachel provided an update on her work with the customer to cash group to improve customer experience.
• Survey responses as well as phone calls used to understand customer experience. This information has been shared with various departments.
• Working on making invoicing clearer and more understandable.
• Working on improving accuracy and timeliness of processing payments
• Working on consistency of information provided
• Discussed fact that product numbers are not
appearing on all invoices, so Rachel wanted to know if this was material information users wanted and/or needed.

- Deborah said that the most important information to her is the title of the product and a description of what it is (e.g., yearly update, specific release number, etc.).
- Rachel hopes to be able to share more specific information including roadmaps and timelines for improvements to customer billing at the next phone call around the beginning of May.
- Kim explained that she is the current liaison to CRIV for Thomson Reuters since the CRIV liaison once again falls within her territory (Deborah works in NY).
- Discussion about the timing for the next call. It will happen in early to mid-May. Deborah will contact Kim and Rachel to schedule it at the beginning of April.

**CRIV/WOLTERS KLUWER SEMIANNUAL CALL**

Date: Thursday, November 21, 2019

Participants: Jenna Ellis (Wolters Kluwer Liaison); Vani Ungapen (AALL Executive Director); Karen Selden (AALL, CRIV Board Liaison) Cynthia Condit (AALL, CRIV Wolters Kluwer Liaison)

**Agenda**

**Wolters Kluwer Programs, Activities, or Business of Interest to CRIV and/or AALL**

- Announcements/Updates
  - **Smart Charts.** At the July 2019 AALL Annual Meeting, Wolters Kluwer gathered a focus group of librarians in the legal field. Many in the focus group indicated strong interest in the practice tool that creates multi-jurisdictional surveys called Smart Charts. Based on the feedback, **Wolters Kluwer will be making Smart Charts its own document type for searching.** The Smart Charts are currently under development. There is no exact roll-out date, but we are expecting it to be sometime in 2020.
  - **“Did You Know?”** To increase awareness of some useful products that people may not know about, Wolters Kluwer is providing focused introductions to these products. Access to products depends on your specific subscription. On today’s call, Jenna drew attention to a **group of over 65 white papers** written either internally by Wolters Kluwer or more often by law firms. The white papers are highly used and well liked. Some professors attach them to course syllabi. However, the white papers do not appear in the usual topical area search results. Instead they must be searched for separately in their own content category under News & Commentary. When accessed, you can browse and word search the white papers. Please see the screenshot below for more detail.
  - **Cheetah.** Jenna noted that Cheetah has now been up and running for a full year. There have been no further outage issues.

**Requests for Advocacy**

- One outstanding request — resolved.
  - **Question:** Why did Wolters Kluwer stop collecting sales tax on tangible items in California since the beginning of 2019?
  - **Response:** California (and Wisconsin) do impose a sales tax on initial purchase of a loose-leaf subscription (they published the letter ruling). **Sales tax must be paid,** according to the California State Board of Equalization, **on initial purchases** because purchasers are receiving binders, (tpp), with the subscription, and the binders are not sold separately from the subscription. Because the binders are taxable, the entire initial subscription is taxable. The **renewal of the subscription is not taxable**
because the customer receives monthly updates (i.e., more than four), and therefore the renewal qualifies as an exempt subscription.

• No new requests

**AALL Programs, Activities, or Business of Interest to Wolters Kluwer**

• Sponsorship contact for AALL Annual Meeting
  • The new sponsorship point of contact for the AALL Annual Meeting is Rocco Impreveduto, director of marketing at Wolters Kluwer.

• Other Items of Interest — None