

# THE CRIV SHEET

THE NEWSLETTER OF THE COMMITTEE ON RELATIONS  
WITH INFORMATION VENDORS

VOLUME 42, NO. 3 / JUNE 2020





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Vendors (CRIV) Members**

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Published by the American Association of Law Libraries  
105 West Adams Street, Suite 3300  
Chicago, Illinois, 60603  
[www.aallnet.org](http://www.aallnet.org)

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Welcome to a very unusual edition of *The CRIV Sheet*. Traditionally the third issue prominently features previews of CRIV-related sessions at the upcoming AALL Annual Meeting. Unfortunately, this year due to the COVID-19 pandemic, in lieu of an in-person Annual Meeting, AALL will be holding a virtual conference this summer. With that transition comes several questions regarding what programs the virtual conference will include. To that end, we have highlighted the top five CRIV-related programs originally scheduled at the AALL Annual Meeting in New Orleans, with a description of each. We hope you are able to find the time to take a look at these programs during the Virtual Conference this summer.

In addition, members of CRIV have provided a helpful guide that includes steps each vendor is taking to help libraries and institutions access the resources they need during the pandemic, as well as resources for working remotely. We hope this guide proves helpful as we all continue to navigate the new normal. Please check the [CRIV Blog](#) and [Vendor Relations](#) page through AALLNET for more updated information as it becomes available. Take care everyone and enjoy *The CRIV Sheet*!

# FROM THE CHAIR

R. MARTIN WITT

ASSISTANT DIRECTOR FOR SPECIAL PROJECTS & LECTURER IN  
LAW

COLUMBIA UNIVERSITY ARTHUR W. DIAMOND LAW LIBRARY

Hello Readers of *The CRIV Sheet*,

We hope this message finds you and yours healthy and well. In this time of unprecedented turmoil, many of us continue to face changes in our work, including in the very nature of what we do. In light of this, CRIV's role has changed somewhat, but we're hopeful that we will be able to help provide you with information that you need.

In this issue, we highlight—as we do every year—some of the AALL Annual Meeting programs that we think would be of interest to our readers. This year, obviously, is different since there will be no in-person Annual Meeting. We nevertheless remain hopeful that some of these sessions will be held in the new virtual format.

CRIV has also begun compiling information on what different vendors are offering in response to COVID-19. The **most current information** is available on AALLNET under *Resources and Tools from Vendors to Assist You During COVID-19*. Those resources are under constant development, so if you know of others to be included, please share them with [leadership@aall.org](mailto:leadership@aall.org). There is information related to Academic Law Libraries, Court Libraries, Law Libraries Open to the Public, and Law Firm Libraries as well. What has been put together thus far is due largely to the efforts of Deborah Heller, Steve Anderson, and Karen Provost, and we owe them thanks for the extra effort they've put in, even while faced with additional challenges in their day jobs. I also would like to invite you all to attend the virtual **Committee on Relations with Information Vendors (CRIV) Vendor Roundtable** this year, on Monday, July 6 from 2:00 PM - 3:00 PM EDT. The general topic of the vendor roundtable is vendor responses to COVID-19 and plans for the future as well. Registration is required to attend.

Please note, vendor speakers will need to provide their name and email address to participate as a panelist. Every vendor representative who would like to speak must provide that information. It should be emailed to **Deborah Heller** (CRIV Vice-Chair becoming Chair) and to **me**. If you have any questions about this, please reach out to us both.

Speaking of Deborah, I feel confident in CRIV's future with her at the helm. As my three years on CRIV draws to a close, she will be taking over as Chair come this July. Though we will not have the traditional CRIV events and formal transfer in person, there is still hope that something can be offered. In any event, I have the utmost confidence in Deborah's ability to lead CRIV through the next year and I'm certain that CRIV will continue to serve an important role as information conduit between AALL membership and vendors.

It has been my absolute pleasure to serve CRIV and the AALL membership for two years as CRIV member and editor of *The CRIV Sheet*, and an additional year as CRIV Chair, and I look forward to what the future holds.

**CRIV Blog**  
[crivblog.com](http://crivblog.com)

Karen J. Provost  
COORDINATOR

Matt Timko  
Ashley Ames Ahlbrand  
Cynthia Condit  
Donna M. Lombardo  
Pablo D. Arredondo

## Vendor Roundtable

Matt Timko  
Cynthia Condit  
Donna M. Lombardo

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## Vendor Liaisons

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Bloomberg BNA  
Karen J. Provost  
LexisNexis  
Deborah L. Heller  
Thomas Reuters  
Cynthia Condit  
Wolters Kluwer

# CRIV INFORMATION ON VENDOR ACTIVITIES DURING COVID-19

## DEBORAH HELLER

ACTING DIRECTOR OF THE LAW LIBRARY  
ELISABETH HAUB SCHOOL OF LAW AT PACE UNIVERSITY

## STEVE ANDERSON

DIRECTOR  
THURGOOD MARSHALL STATE LAW LIBRARY

## R. MARTIN WITT

ASSISTANT DIRECTOR FOR SPECIAL PROJECTS & LECTURER IN LAW  
COLUMBIA UNIVERSITY ARTHUR W. DIAMOND LAW LIBRARY

This information from CRIV is also included on [AALL's COVID-19 Update & Resources](#) page. Information relevant to law firm libraries is still being gathered. Visit AALLNET for the most current information.

### Academic Law Libraries

#### West Academic/Thomson Reuters (TR)

- Providing digital access to casebooks through the end of May
  - Students need to call the customer service team at 877.880.1330 and mention that they are at a school affected by a Coronavirus-related closure
- Providing access to West Academic assessment through the end of May
  - [View instructions](#)
- Providing access to the study aid platform until June 1
  - Your law school sales consultant can help you set up access
  - You will provide your email domain, a landscape version of your school's logo, and your IP range
  - If you cannot accept deliveries of your standing orders at the moment, TR will suspend ship-

ments. You just need to contact [Academic Customer Service](#) to stop the deliveries and then to restart them.

- TR has set-up a COVID-19 Resource Center
- Practical Law has a global Coronavirus toolkit
- We are currently offering national webinars geared toward helping students with their assignments, as well as those from our *Prepare to Practice* series. [Students can register for these webinars](#)
- Providing students and faculty free access to some continuing legal education programs, events, and skills courses from West LegalEdcenter: [WLEC Academic Outreach Program](#) as well as a link to the course WLEC Academic Outreach Course List

### LexisNexis

- Providing a 59-day trial to the LexisNexis Digital Library
  - Includes casebooks from Carolina Academic Press, study aids from Carolina Academic Press, treatises, practice guides, and more
  - Need to send an excel spreadsheet with names and email addresses of students and faculty who need access to [eBooks@lexisnexis.com](mailto:eBooks@lexisnexis.com). The subject of the email should include the name of the school and LexisNexis Digital Library ID Request – Coronavirus Support

- You can contact **Deana Sparling** and **Dave Kohr** to be put in contact with a Digital Media Specialist who will assist you
- Lexis has also distributed to librarians links and search tips to search for COVID-19
- Law360 has a dedicated COVID-19 page
- Lexis Practice Advisor has developed a **Coronavirus resource kit**
- If you cannot accept deliveries at the moment, Lexis will suspend shipments of your standing order materials. You need to get in contact with your Print and Digital Account Manager.

### Wolters Kluwer

- Providing e-casebook access to students through the VitalSource Helps Platform
  - **Learn more about the VitalSource Helps Program**
  - VitalSource Helps access instructions:
    - To get started, students should visit **bookshelf.vitalsource.com** and log in or create a Bookshelf account with their institution-provided email address.
    - Get instructions for creating a Bookshelf account for both students and instructors.
    - Once students create an account with an institution-provided email address, they should log in and click on the “Explore” tab in the upper left corner of the screen. This tab provides access to the freely available e textbooks.
  - For a complete list of VitalSource frequently asked questions regarding access to the VitalSource Helps Program, please visit their site to learn more.
- For courses where a Connected Casebook has been adopted, we will also provide students access to the ebook, learning tools, and study center for their textbook on **CasebookConnect.com**. Student access will include:
  - Digital e textbooks with **search, highlighting, and note-taking capabilities**

- **Additional learning materials and practice questions** from leading study aids such as *Examples & Explanations* and *Glannon Guides*, including:
  - Video explanations
  - Flashcards
  - Multiple choice
  - Hypothetical short answer
  - Essays
  - Issue-spotting exercises
- **Outlining and Case-briefing tools to help students work more efficiently**
- Providing access to their online study aid platform as well. You will need to provide the following information:
  - Contact name, phone, email, address
  - Billing contact, name, phone, email, address. (although they are providing the service for free until June 30, 2020)
  - FTE based on 509 reporting to the American Bar Association (ABA).
  - Tax Exempt certificate
- Delivery option (how you want to provide access):
  - **Option 1: Referrer URL Authentication (via institution’s password-protected website)**
    - Institution has a password-protected section on their own library website.
    - Students log in to the library website using their credentials.
    - Students navigate to the page where the referral URL has been placed.
    - The URL of this page is configured against the institution’s account
    - Allows students to gain access to the bookshelf without using login credentials.
  - **Option 2: “Library Card” Authentication**
    - Institution provides WK a unique identifier for eligible students (email or student id#).

- Students go directly to [ebooks.aspenlaw.com](https://ebooks.aspenlaw.com) to log in.
- **Option 3: IP Range Authentication**
  - Institution provides WK a range of IP addresses for the institution.
  - Students who are within the IP range can navigate directly to [ebooks.aspenlaw.com](https://ebooks.aspenlaw.com).
  - Students have access off-campus if the institution has a proxy server.
- To arrange for Connected Casebook or the study aid platform access you can contact your Wolters Kluwer Legal Education Institutional Sales Representative.
- Providing free access to their COVID-19 smart charts

### Bluebook

- The Bluebook Editors provided trial keys that last 60 days for students. To request the keys, send the number of keys needed to [orders@legalbluebook.com](mailto:orders@legalbluebook.com)
  - To redeem this key (and set up an account), enter it at [www.legalbluebook.com](http://www.legalbluebook.com) where it says “Bluebook Key Redemption” and follow the on-screen instructions to set up a username (unique and active email address) and password. You only use the key once. From that point forward, you access your account with your username and password.
  - The subscription is active 60 days from the date you redeem this key on the website.
  - After you set up your account you might need to log out and then log back in again to view site contents.

### HeinOnline

- Halted physical shipments of print and microfiche products.
- If for some reason you do not have remote access in place, please have the authorized license contact on your account email us at [holsupport@wshein.com](mailto:holsupport@wshein.com) for assistance.

### Other

- Ebook vendors such as Proquest and EBSCO are providing unlimited user access to ebooks for a limited period of time even if you purchased only one user access.
- JSTOR has opened up access to all journal archive collections through June 30, 2020.
  - In order to obtain this access your library must already have access to at least one collection,
  - Fill out a request form: <https://about.jstor.org/covid19/expanded-access-to-collections/>
  - They also have opened free access to ebooks on request.
  - You can read more and request here: <https://about.jstor.org/covid19/>
- Many journal databases are providing trial access through the Spring semester.

### Court Libraries

#### Thomson Reuters

- Our Westlaw account managers are assisting public law libraries and patrons in multiple ways. For librarians, Patron Access can be made available for unlimited use. Patrons can register for a trial of Westlaw Edge and account managers also can generate temporary passwords to Westlaw for distribution to patrons by law librarians. For government attorneys, judges, and staff of courts and law departments/agencies, the account managers can create temporary passwords for Westlaw Edge access.
- Also, for Westlaw subscribers, they have developed the **COVID-19 Legal Materials & News** page on Westlaw to help understand how governments, agencies, and courts are responding to the pandemic and how the pandemic relates to the practice of law. The **COVID-19 Legal Materials & News** page provides a single access point within Westlaw that compiles COVID-19-related information from multiple content types—statutes, regulations, case law, dockets, current awareness, Practical Law and Reuters Legal, as well as court closure orders. The page will also include relevant analytical materials as they are produced, providing expert insight into



how COVID-19 impacts all aspects of the practice of law.

- For government attorneys, judges, and staff of courts and law departments/agencies, the account managers can create temporary passwords for Westlaw Edge access.
  - Thomson Reuters is offering a COVID-19 Resource Center on [thomsonreuters.com](https://thomsonreuters.com). The free offering includes the latest Reuters reporting from around the world about the virus and efforts to slow its spread. The site also offers free resources, created and curated by Thomson Reuters legal and tax experts, to assist professionals in preparing for and responding to issues. This content set includes a Practical Law Toolkit to guide counsel working across jurisdictions through Practical Law's global Coronavirus, COVID-19, pandemics, and business interruption content. New content will be added over time. Additionally, *Reuters News* has introduced a free embeddable COVID-19 tracking graphic for government bodies and health authorities.
- As a courtesy, LexisNexis can temporarily hold your subscriptions during this time.
  - Hopefully, this resolves the immediate situation with separation from your office and access to your publications. If you need immediate access and you do not already subscribe to the ebook in the same title on hold, in most cases we can provide ebook options for your titles.
  - NOTE:
    - Please be advised qualifying ebooks should only be offered complimentary if customers do not place a subscription hold on their print.
    - Customer must have an active print subscription in good standing.
    - Be aware of the titles that can be offered in ebook form with the discount.
    - Federal Government is excluded

### **Bloomberg Law**

- Bloomberg Law has opened up much of its COVID-19 coverage outside the paywall at <https://www.bloombergindustry.com/covid-19-resources/>
- Pro bono attorneys can utilize Bloomberg Law's **vast array of resources** across multiple practice areas in order to best serve their clients for 30-days at no charge
- Print mailings to the Tax Management Portfolios are being held. Subscribers will receive a consolidated set of updates when the situation abates.
- Users with IP authenticated access to Bloomberg Law experiencing difficulty accessing their subscriptions should contact their representative or the Bloomberg Law Help Desk at 888.560.2529 for usernames and passwords.
- County law libraries handling reference offsite can also get complimentary access to Bloomberg Law along with remote training to help them support their patrons during this pandemic.

### **LexisNexis**

### **Law Libraries Open to the Public**

#### **Thomson Reuters**

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- Thomson Reuters is offering a COVID-19 Resource Center on [thomsonreuters.com](https://thomsonreuters.com). The free offering includes the latest Reuters reporting from around the world about the virus and efforts to slow its spread. The site also offers free resources, created and curated by Thomson Reuters legal and tax experts, to assist professionals in preparing for and responding to issues. This content set includes a Practical Law Toolkit to guide counsel working across jurisdictions through Practical Law's global Coronavirus, COVID-19, pandemics, and business interruption content. New content will be added over time.

- Westlaw account managers are assisting public law libraries and patrons in multiple ways. For librarians, Patron Access can be made available for unlimited use. Patrons can register for a trial of Westlaw Edge and account managers also can generate temporary passwords to Westlaw for distribution to patrons by law librarians.
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  - Hopefully, this resolves the immediate situation with separation from your office and access to your publications. If you need immediate access and you do not already subscribe to the ebook in the same title on hold, in most cases we can provide ebook options for your titles.
  - NOTE:
    - Please be advised qualifying ebooks should only be offered complimentary if customers do not place a subscription hold on their print.
    - Customer must have an active print subscription in good standing.
    - Be aware of the titles that can be offered in ebook form with the discount.
    - Federal Government is excluded

## CRIV SHEET RECOMMENDED PROGRAMS FOR THE 2020 AALL VIRTUAL CONFERENCE

The **113th AALL Virtual Conference** will be held this summer. The theme of the conference is “Unmasking our Potential.” We hope you take the time during the Virtual Conference to check out many (if not all) of the following recommendations from *The CRIV Sheet*. 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 2020 issue. If you are interested, please contact *The CRIV Sheet* editors, **Ashley Ames Ahlbrand** or **Matt Timko**.

Please Note: these sessions are taken from the **schedule** published prior to the announcement of the Virtual Conference. If any changes are made, they will be published on the *CRIV Blog* as soon as possible.



## THE BUSINESS OF RESEARCH SERVICES: TRANSFORMING ROLES TO ADD VALUE (LIVESTREAM)

Going beyond traditional research can add new visibility and value to research services. Librarians are claiming nontraditional spaces by leveraging their unique research skills strategically, beyond the physical library. Whether it is competitive intelligence, strategic business development, project management, web design, or thought leadership, the demands of today's organizations have created new opportunities for library staff to demonstrate their value. Based on the experiences chronicled in the recent article "[Knowledge to the Rescue! The Innovative Deployment of Information Professionals](#)" (*ALL Spectrum*, Jan/Feb 2020), this session will explore how the staff at Eversheds Sutherland reinvented themselves and their roles in supporting the success of their firm.

## SEARCHING IN ALL 50 STATE COURT DOCKETS: WILL IT EVER BE A REALITY? (LIVESTREAM)

For due diligence and business development purposes, litigators and corporate attorneys alike often ask whether a company or individual is involved in litigation in every state in the United States. Librarians are always put in the awkward position of having to explain why this search is not even remotely possible. Understanding the efforts that vendors go through to obtain this information will help us better explain the situation to anxious dealmakers and litigators. Are some county clerks a stumbling block? Is it a cost issue? What are the confidentiality and technology issues that make court documents so difficult to provide? Why is there no state court coverage for some states and full statewide access for others, depending on which vendor platform you use? Panelists from leading court vendors will provide insight into why state court dockets and documents are such an elusive research commodity.

## LEGAL ETHICS IN THE USE OF ARTIFICIAL INTELLIGENCE

There is a pressing need for both innovators creating the datasets as well as users such as law librarians and

attorneys to be aware of the ethical implications of using artificial intelligence (AI). Despite the fact that the American Bar Association (ABA) and state bars have no specific ethics opinions on the use of AI by lawyers, existing ethics rules do apply, such as duty of competence, duty to supervise, and others. The ability to understand AI, its results, and the impact on litigation is not only beneficial for attorneys, it may be required by legal ethics.

## COPYRIGHT ISSUES IN THE CONNECTED AND DIGITAL WORLD (LIVESTREAM)

By 2020, the digital universe will reach 44 zettabytes! As librarians, we curate, research, share, and protect information. Doing so requires knowledge of copyright law and the nuances related to the growing world of connected and digital information. Is social media important for your library? Learn how to ensure your library's social media posts are copyright compliant. Who owns the "law"? Hear what the Supreme Court of the United States has to say about the Official Code of Georgia Annotated. How can you support authors' rights? Receive guidance to help authors exercise their right of reversion.

*This program is sponsored by the ALL-SIS.*

## RESEARCH TOOLKIT: ANSWERS TO YOUR RESEARCH QUESTIONS IN ONE CLICK (PRERECORDED)

**Problem:** A mid-sized law firm with many practice areas was investing millions of dollars in an abundance of research resources that associates were either unaware of or did not know how to use effectively. **Solution:** We created a database to answer the most frequently asked questions arranged by topic. **Process:** Working with the reference staff, we identified the top questions and which databases answered each question best. The resources were chosen based on quality, ease of use, and price. Currently, the Research Toolkit utilizes more than 15 resources, contains more than 25 major topics (e.g., litigation analytics, securities laws, and regulations among others), each with

detailed subsections (e.g., company analytics, judicial analytics, '40 Act statutes, etc.). The groupings cover everything from a simple query on how to find a docket, to complicated questions such as comparing state laws

on employment discrimination to practical guidance on investing in hedge funds.

*This program is sponsored by PLLIP-SIS.*

## 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 call with Bloomberg BNA. The most recent calls to LexisNexis, Thomson Reuters, and Wolters Kluwer can be found in the February issue of *The CRIV Sheet*.

## CRIV/BLOOMBERG BNA SEMIANNUAL CALL

### R. MARTIN WITT

ASSISTANT DIRECTOR FOR SPECIAL PROJECTS & LECTURER IN LAW  
COLUMBIA UNIVERSITY ARTHUR W. DIAMOND LAW LIBRARY

Thursday, December 17, 2019, 11:00 a.m. EST

Participants: Joe Breda (President, Bloomberg Law); Mike Bernier (Director, Knowledge Services and Library Relations; Bloomberg Law); Vani Ungapen (Executive Director; AALL), R. Martin Witt (Chair, CRIV); Karen Selden (AALL Board Liaison to CRIV)

### New Bloomberg Law Products, Policies, and Issues of Interest

- Corporate and Litigation Practical Guidance tools continue to be expanded. New suites include:
  - Initiating & Defending Litigation
  - Litigation Finance
    - Both go live on December 18, 2019
    - Both fully integrate with existing tools on Bloomberg Law (e.g., Points of Law; Docket Key; SmartCode)
- Law X.0 podcasts
  - Available on Apple Podcasts and Stitcher
    - Focused on the future of the practice of law
- Workflow enhancements
  - Revamped alerts management system
  - Simplified printing process, including bulk printing and downloading multiple files from a results list

### Upcoming Bloomberg Law Products, Policies, and Issues of Interest

- Big product release of 2020 Q1 will include
  - Brief Analyzer
    - To be released to all Bloomberg Law customers
    - Will allow users to upload a brief and get related legal materials from Bloomberg Law

### Requests for Assistance (RFA)

#### RFA #1 – Restrictions on Docket Use (Academic Law).

##### R. Martin Witt:

*Background – There were a number of Requests for Assistance in which AALL members reported having Bloomberg Law users who were told that their Bloomberg Law accounts were prohibited from executing any further Dockets Transactions. These users received a letter from Bloomberg Law's legal counsel saying they had been identified as having an excessive amount of docket transactions. Some AALL members also indicated that users were told they were banned "for life." Historically, AALL members who have Bloomberg Law often recommend Bloomberg Law as a resource for access dockets, precisely because there was not a preset limit on the transactions that could be completed.*

**Joe Breda:**

*In general, Bloomberg Law offers pretty much unlimited/unmetered docket access to every single law school seat. There is, however, an external variable cost associated with the transactions, which is borne by Bloomberg Law. Docket usage is increasing at a non-linear rate, and, rather than severely limit docket access across the board in the law school market, Bloomberg Law identified 23 individual users whose usage was several orders of magnitude above “normal” usage and contacted them, referring to a Bloomberg Law’s general provision allowing access to be restricted. Those 23 users are not forbidden from accessing Bloomberg Law; they are also not forbidden from accessing dockets on Bloomberg Law. The restriction applies only to the ability to incur costs via docket requests and docket alerts. Those 23 users could only perform actions that would generate costs if they agreed to cover the costs of those actions.*

*Agreements to cover the costs of docket requests have been discussed with two of the 23 users, but a billing mechanism is still being worked out by Bloomberg Law.*

**Mike Bernier:**

*Bloomberg Law will be meeting with a group of law library directors at AALS, to gather feedback and perhaps work to establish thresholds that could be used moving forward. The purpose is not to reduce the use of dockets for general legal research, but instead to curb the excessive use of dockets above what is reasonably expected.*

**Joe Breda:**

*Again, the vast majority of law school users (students and faculty)—99.8 percent of academic users—were completely unaffected.*

**R. Martin Witt:**

*Were any of the 23 users running scripts or were they all manually gathering/using dockets?*

**Joe Breda:**

*That’s less of a relevant question in this instance, because even if done manually the fees incurred were extremely high. This is particularly true with docket tracks because, once set up, they can generate substantial fees without any further human action required.*

**R. Martin Witt:**

*To recap, there is no strict limit right now, but setting a threshold will be discussed at AALS. Other aspects CRIV would recommend be included in those AALS discussions are 1) the possibility of some warning, prior to restricting docket functionality for users; 2) perhaps a suspension period prior to a permanent restriction of certain docket actions; 3) whether the permanent restriction will remain for all 23 users already identified.*

**Joe Breda:**

*Bloomberg Law is totally willing to return full functionality to any of the 23 users under either of two circumstances: 1) they discontinue whatever actions were driving disproportionate fee generation or 2) they reach at least an informal*

*agreement to bear the financial burden for the excessive activities.*

**R. Martin Witt:**

*Finally, the letter from General Counsel indicated that “efforts to circumvent the prohibition” would lead to suspension and/or termination of the Bloomberg Law agreement. What would constitute efforts to circumvent? Would, for instance, a reference librarian requesting an item that the faculty member with restricted access could not request be an effort at circumvention?*

**Joe Breda:**

*Absolutely not, that activity by a reference librarian would be fine. The efforts at circumventing that are not permitted would be things such as transferring all the existing alerts that caused an account to be restricted to another account that had not been restricted. A summary of the AALS meetings will also be provided to CRIV to be appended to these minutes or share shortly thereafter. If law librarians would like to share their thoughts on this, please contact Mike Bernier.*

**Post-Call Addendum**

Bloomberg Law reported constructive conversations at AALS regarding law school docket use and are making some refinements to a policy based on feedback at that meeting and will communicate further.

**RFA #2 – ABA/BNA Lawyers’ Manual on Professional Conduct**

**Joe Breda:**

*As has been expressed multiple times over recent years, Bloomberg Law sees its future as two things: 1) completely digital; and 2) an integrated platform. At this point, this was essentially the final print resource produced by Bloomberg Law. After extended discussions with the leadership at the ABA, everyone agrees the future is digital and the time has come to make that move with respect to this product. An entirely new slice of Bloomberg Law was built out, which will allow for a more current product than the print could offer.*

**R. Martin Witt:**

*ABA/BNA Lawyers’ Manual on Professional Conduct has current archives in PDF, with citable pagination. Will that be maintained?*

**Mike Bernier:**

*Yes, the archive will be maintained.*

**R. Martin Witt:**

*Will new updates be similarly paginated?*

**Mike Bernier:**

*We have been reworking this resource from page-based pagination to paragraph-based pagination, which will hopefully make the transition easier since updates after the end of the year will not have fixed pagination. Even when print goes away, we will have a means of consistent citation.*

## **R. Martin Witt:**

*OK, thank you. Moving to consistent paragraph formatting should hopefully alleviate some concerns over citations. With respect to access, there seems to be some similarity to the concern over access—primarily for court/public Law Libraries, or those open to the public—that we discussed in connection with the Tax Management Portfolios (TMPs) last year. For the TMPs, you were open to the idea of kiosk access based on IP address rather than simply by specific machine address. Could there be something similar—either a slice or kiosk-based access to the new professional responsibility platform—available to those libraries who are open to the public and have financial constraints that make providing public access to the complete Bloomberg Law platform untenable?*

## **Joe Breda:**

*There is no current kiosk-based configuration for that particular slice. A challenge with IP authentication is that it becomes difficult to price appropriately. We are, however, willing to discuss the possibility and will follow-up with CRIV and the libraries impacted.*

## **R. Martin Witt:**

*I'm not sure there'd be a consensus, given all the different circumstances law libraries face. For some law libraries though, especially those that make a concerted effort to serve the public and attorneys who are unlikely to have access to the full Bloomberg Law, this is a resource that is of great importance. It isn't a niche practice area; it's something that every practicing attorney should be able to stay informed on. IP-recognition would likely be preferred, for ease of administration, but even a kiosk-based configuration (single terminal) with just the professional responsibility slice available could be a good compromise.*

## **Post-Call Addendum**

Bloomberg Law responded to concerns that law school and court libraries were unable to make the ABA/Bloomberg Law Lawyers' Manual on Professional Conduct available to patrons after print ceased. As a result of issues raised by CRIV, law schools and courts may now purchase an IP-authenticated electronic version of just the ABA/Bloomberg Law Lawyers' Manual on Professional Conduct at a price significantly less than a full Bloomberg Law Patron Access terminal. Librarians should contact their Bloomberg Law Relationship Partner for more information.

## **RFA #3 – Itemized Invoices, Including of Electronic Subscriptions**

### **R. Martin Witt:**

*An AALL member subscribes to multiple electronic products from Bloomberg Law and needs itemized invoices in order to properly allocate costs from Bloomberg Law to appropriate practice groups. Is there anything that can be done for this subset of firms that needs to allocate costs of individual electronic products?*

### **Mike Bernier:**

*The default is to bill as one lump sum. Requests for itemized bills can generally be accommodated on an individual basis, since it is a manual process. If the request has been made to the billing contact and the response is not satisfactory, users should contact [Mike Bernier](#) directly for a cost-per-subscription breakdown (with some limitations if bundling makes such a breakdown impossible).*

## **RFA #4 – BNA Books**

### **R. Martin Witt:**

*Within the past couple days, there have been a rash of incidents where Bloomberg Law Books (formerly BNA Books) have been delivering multiple copies of materials and billing them separately when only one was ordered. There was also a lot of institution account information that was lost in a recent transition. I know you've just been made aware of the issues as well. Can you share any additional information or progress on diagnosing the issues?*

### **Mike Bernier:**

*The [books@bloomberglaw.com](mailto:books@bloomberglaw.com) email address should now be sufficient to address most of the concerns expressed. There was a transition, but it is being worked on. If there is a need for escalation of a particular issue, people should be forward the previous correspondence to me.*

### **Joe Breda:**

*We have someone in the office now tracking down instances where customers were sent books/copies that they didn't want and working to resolve them. We are also working on fixing issues in our accounts that were transferred, including the loss of information related to tax-exempt status, so we are asking for that information and should be able to effectively keep track of that moving forward. Please just continue to communicate with us as we work through this process and the best initial contact is [books@bloomberglaw.com](mailto:books@bloomberglaw.com).*

### **R. Martin Witt:**

*Was there a pattern to the extra books that were sent out, which might indicate a systematic issue?*

### **Mike Bernier:**

*Unfortunately, no. We've been able to resolve the individual issues, but there does not seem to be any commonality among the extra materials that were sent out.*

## **RFA #5 – Full-time Equivalent (FTE) Measure**

### **R. Martin Witt:**

*An AALL member reported that Bloomberg Law was trying to “prove” that JD enrollment had crossed a certain threshold, thereby increasing their subscription cost and were requiring extra steps to certify the number as correct even though it was publicly available.*

### **Mike Bernier:**

*Generally, Bloomberg Law takes the ABA 509 report and if enrollment drops, we request something from the registrar that confirms the drop. If there is no discrepancy identified by the school, Bloomberg Law will not seek to identify discrepancies itself or require additional certification of ABA 509 numbers.*



[www.aallnet.org](http://www.aallnet.org)

