Committee on Relations with Information
Vendors (CRIV) Members

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Dear Readers,

Welcome to a new issue and new volume of The CRIV Sheet. I’m continuing this year as editor, and am as excited to release this new issue as I am shocked at how quickly the fall is escaping us: November already!

Our CRIV harvest yields a helpful and thorough survey of business-related research platforms and tools that law school faculty and students often find useful. Mark Williams of Vanderbilt Law School offers insights on the uses of these specialized resources, as well as their accessibility and acquisitions considerations.

Also on the table is a timely and compelling update on recent legislative attempts to allow libraries to license e-books from publishers for widespread access—efforts that require overcoming entrenched federal copyright law and less-than-enthusiastic publishing houses. Jackie McCloud of Indiana University McKinney School of Law gives us not only background on the situation, but also ways in which librarians can support the movement toward more accessible e-books in the information-spreading spirit of our profession.

As promised, we are also back with reviews of CRIV-oriented programming from the 2022 AALL Annual Meeting in Denver. CRIV members Cynthia Condit, Monique Gonzalez, Jeanne Price, and Christy Smith recap several programs, all of which have audio recordings and additional materials available for AALL members on AALL eLearning.

We end with notes from CRIV’s semiannual calls with two vendors: Bloomberg Law and LexisNexis. Representatives of the companies discuss recent changes, enhancements, and company initiatives that impact users and purchasers of their products.

As always, please reach out with suggestions or ideas for The CRIV Sheet. Starting with our next issue for March, I’m delighted to have Ashley Arrington of Texas Tech Law as my co-editor. Going forward, you may contact either Ashley or me, or both of us, about The CRIV Sheet.

Happy reading, and a happy wind-down to your 2022!
Greetings Readers!

Thank you all for reading the first issue of *The CRIV Sheet* for the 2022-2023 term. I am following Ashley Ahlbrand, past chair, and I will be handing CRIV off to Jeanne Price, current vice-chair, for the 2023-2024 term.

**Highlights from Last Year**

During our 2021-2022 term, the **CRIV Vendor Roundtable** was held virtually on June 22, 2022. Representatives from Bloomberg Law, LexisNexis, Thomson Reuters, and Wolters Kluwer joined us to discuss their companies’ approaches to ensuring diversity, equity, and inclusion in their products and services.

Additionally, the Committee conducted a **survey of AALL members** about CRIV’s services and resources. CRIV understands that as the profession continues to change, so does the creation, packaging, and delivery of legal information. The goal of the survey was to ensure that the Committee continues to meet the needs of the profession. During the coming term, CRIV will respond to your feedback through programming and other efforts that will help CRIV stay relevant to the evolving needs of all AALL members.

**The CRIV Sheet**

We are fortunate to have Andrew Christensen continue as editor of *The CRIV Sheet* for a second year. Joining Andrew as co-editor for the next issue (Volume 45, No. 2) will be Ashley Arrington. *The CRIV Sheet* is always looking for people interested in contributing timely and interesting articles relevant to the AALL community. You do not need to be a member of CRIV to contribute! Please reach out to Andrew or Ashley with your ideas and any questions. They are happy to help you flesh out an article for publication.

**CRIV Blog**

Doubly fortunate for us, Christy Smith continues as coordinator of the **CRIV Blog** for a second year. Like *The CRIV Sheet*, the CRIV Blog is always interested in guest authors. **CRIV Blog** posts often appear at the top of AALL’s *KnowItAALL* roundup emails. A blog post can cover almost any information topic or news that you think the AALL community would be interested in reading about. Christy offers suggestions for those who may wish to write but can’t come up with an idea. Please reach out to Christy if you are interested in contributing a post or have a post idea.

**Finding CRIV Information**

- **The CRIV page** on AALLNET provides the Committee’s purpose and charge, plus information about membership qualifications, time commit-
ment, and tenure. If you are interested in becoming a member of CRIV, be sure to respond to AALL’s volunteer outreach by December 15. We would love to see you come on board!

- Visit the CRIV Tools page for checklists, sample forms, letters, and publications designed to help(116,566),(885,611) meet the needs of your libraries and users.

- If you have a vendor issue that you would like CRIV’s assistance with, visit the Request for Assistance page and submit the form there. Your personal information is kept confidential and is not shared with the vendor.

- CRIV Liaisons to Vendors. CRIV has four committee members who serve as vendor liaisons. They conduct semiannual conference calls with one of four vendors: Bloomberg Law (Jeanne Frazier Price), LexisNexis (Monique Gonzalez), Thomson Reuters (Elizabeth Butler), and Wolters Kluwer (Jane Bahnson). Look for their reports of these calls in the CRIV Blog and The CRIV Sheet. Vendor liaisons also manage any Requests for Assistance that are submitted for that vendor.

- Approved in 2013 and revised in 2015, the CRIV Vendor Relations Policy directs “the Association’s advocacy in issues related to legal publishing and legal publishers.”

AALL’s Antitrust Frequently Asked Questions answers questions about the need for an antitrust policy and links to other professional library associations’ antitrust policies.

We have a terrific CRIV team this year. The majority of the CRIV work is done through subcommittees. Each subcommittee is led by the CRIV chair or an appointed CRIV member. Each CRIV member serves on multiple committees, as well as contributes to the CRIV Blog and The CRIV Sheet. I would like to thank all continuing and new members of CRIV for their willingness to serve and help CRIV continue to thrive. CRIV will continue to work closely with the vendor liaisons and strive to foster relationships with other committees.

Please feel free to contact me with any concerns or suggestions related to CRIV.

BEYOND LEGAL RESEARCH: BUSINESS AND SECURITIES DATABASE OPTIONS FOR LAW SCHOOLS

MARK J. WILLIAMS
ASSOCIATE DIRECTOR FOR COLLECTIONS AND INNOVATION
VANDERBILT LAW SCHOOL

For many law students, particularly those going to large corporate firms, transactional law and mergers and acquisitions (M&A) activities will make up a large portion of their workload. Although not business students themselves (in most cases), this group is expected to have a more heightened level of business and finance literacy than would normally be taught in a law school curriculum. This often requires access to and proficiency with business-related databases that fall outside the traditional legal research realm and provide enhanced coverage of company and industry information, as well as transactional and financial data.

This article presents an array of resources available for transactional or business-focused legal work and discusses their target audiences, “use cases” where they would be applicable, and licensing and economic considerations.

Target Audiences and Use Cases
Many or even all the resources discussed below would be inappropriate or unnecessary for some law schools.
Not every institution has the business research focus or financial freedom to invest in boutique research areas, especially when such products are often prohibitively expensive.

At schools such as my own at Vanderbilt Law, we have a formal Law and Business Program with seven full-time faculty members. Many of these faculty also hold joint appointments at Vanderbilt’s Owen Graduate School of Management. We also have clinics devoted to transactional law, and I teach a credit-bearing course on business and securities research.

At schools like Vanderbilt, there is an almost inelastic demand for business information. Libraries similarly situated may find themselves receiving research requests requiring a broader range of business databases than traditional legal resources can provide. It follows that students at such schools often land jobs at large firms, with corporate clients accounting for a great deal of their workload.

As Matthew Morrison's outstanding summer 2016 Law Library Journal article on company information outlines, law students typically interact with business information in the following ways:

1. **Current Corporate Clients.** Corporate clients in particular have become increasingly sophisticated consumers of legal services, and though law students typically do not have MBAs, they are often expected to have MBA-level understanding of their clients’ business and industry landscape.

2. **Business Development** - An underrated but increasingly important aspect of business information literacy in a legal context is the identification and generation of new business or practice areas through competitive intelligence techniques. Business-focused resources not only help to craft a narrative to pitch to prospective clients, but also to identify whom to pitch in the first place.

3. **Mergers and Acquisitions Transactions** - M&A is often the core focus of young corporate attorneys’ work, yet many have little to no experience in locating, compiling, and manipulating the documents and data required for basic due diligence reporting and financial data analysis.

Along with traditional due diligence and company information research, contemporary interdisciplinary business/legal research requests often closely align with the state of venture capital funding. Students and faculty now request information and data to build business models, canvases, and pitch decks. Access to and manipulation of data plays a central role in this type of research. While there are similarities between the purchase of traditional library data sets offered by more commercial-market focused vendors, there are also key differences that may require additional funding, skills, access models, and technological requirements discussed below.

**Popular Databases and Their Uses**

Following is a list of business-focused online resources often used by legal practitioners and academics. It is not uncommon to find many or all these products in larger firms with a corporate law practice. Resources are listed alphabetically.

**Bloomberg Terminal**

- **Description** - Distinct from Bloomberg Law, the Bloomberg service based in its own dedicated terminal is maybe the most famous of the financial databases. It provides data on equities, indices, commodities, currencies, and much more. It is one of the most restrictive research tools in terms of access, and thus not realistic for everyone, but no list of this type would be complete without it.

- **When to Use** - Bloomberg terminals will allow you to find nearly any type of financial data, including quotes and technical analysis of U.S. and international securities.

- **Access and Setup** - Terminal-based access. Some law schools, through partnerships with their business school libraries, acquire a “seat” as part of a pre-existing license, thus allowing for a terminal to be installed within the law library. The potential for partnerships to access terminals elsewhere on campus does exist if local installation is not possible.

**Capital IQ**

- **Description** - Owned by Standard and Poor's (S&P Global), Capital IQ, along with Bloomberg, is maybe the most popular and well-known financial database providing powerful tools for researching
public and private companies, private capital firms, and M&A transactions.

- **When to Use** - This database’s powerful screening and charting features allow for pulling financials on firms, deals, and markets. This can be used for competitive intelligence purposes when looking at law firms involved in deals or for financial modeling—the possibilities are endless.

- **Access and Setup** - Users must typically register with a university email address to create an account. At Vanderbilt, this platform is offered to Business and Law students only.

**FactSet**
- **Description** - A financial platform that provides comprehensive data and analytics on global financial markets, economic measures, and companies.
- **When to Use** - Use FactSet to find nearly any type of financial data, including quotes and technical analysis of U.S. and international securities.
- **Access and Setup** - Access can be considered less restrictive in terms of user-base than other platforms offering similar data. As with many of these products, FactSet can be installed locally on a terminal or personal accounts can be created.

**PitchBook**
- **Description** - Pitchbook is an increasingly popular database for analyzing private equity, venture capital, and mergers and acquisitions across the private investment lifecycle.
- **When to Use** - Pitchbook is useful for establishing benchmarks and finding real-time data on deals. It also offers a great interface for identifying and analyzing investor details. It is an easy-to-use source for finding private company and venture-capital information. It is also an excellent competitive intelligence tool for gathering information on law firms that service various transactions.
- **Access and Setup** - Users must typically create a personal account using a university email address, but other options may be available. It should also be noted that the academic version has a relatively restrictive policy of 10 downloads per day or 25 per month, whichever is less.

**Wharton Research Data Services (WRDS)**
- **Description** - Wharton Research Data Services (WRDS) is a data management system focused on retrieval of information from a wide variety of financial, economic, and marketing data sources.
- **When to Use** - Use WRDS to retrieve current and historical data for large numbers of companies or securities.
- **Access and Setup** - This is a highly restricted resource on most campuses. Law libraries typically will need a partnership or arrangement with a business school or business library, and even in those instances, access may be limited to business-focused law faculty.

**Potential Acquisition Challenges**
A common challenge when acquiring business-focused resources is transitioning licenses typically aimed at the commercial market to the academic market. While this is not a new challenge for law librarians, given the legal research database landscape, many vendors of newer entrepreneur-focused databases are relatively new to the academic market and may not be familiar with standard academic practices or academic uses of their products.

For example, restrictions often arise in the case of faculty pursuing academic entrepreneurial scholarship. Vendors may have unrealistic expectations of control over how their information is used. A vendor may ask to exercise total ownership of any product created from their data. This will often run afoul of standard scholarly communication norms.

Other licenses may go further, asking for the right to approve any works that may be published. In addition to obvious academic freedom conflicts, these place an unrealistic and unreasonable burden on libraries to ensure all data users seek this permission. Other terms range from absolving the vendor of liability for outcomes of financial decisions made using its data, to forbidding any commercial use for any of its content.

These agreements also often do not address standard academic “gray” areas, such as students engaging
in corporate internships for course credit. Though librarians who are literate in these resources and uses may be comfortable with some of the language used, those with the actual authority to sign the agreements often are not, either out of caution or by simply not understanding the dynamics involved. Therefore, it is incumbent upon librarians seeking access to these resources to advocate both with vendors and financial units or collections departments for new types of uses to “future-proof” their contracts.

After licenses are negotiated and products arrive on campus, additional work may be necessary to ensure that relevant terms are easy for users to understand and clearly visible from all resource access points. Rather than creating a climate of restrictive use, make it easy for stakeholders to understand appropriate uses for each resource, yet be clear that diligence is required because different resources will have different restrictions. It is equally important to emphasize how users can receive timely guidance from librarians.

Closing Thoughts

While the challenges outlined above can be impediments, they are also opportunities to forge new long-term partnerships and creative solutions that will pay off beyond the acquisition and triage of any single resource. Many of the resources described in this article were brought to Vanderbilt Law through budget partnerships with the Walker Management Library at Vanderbilt and would not have been possible otherwise.

Entrepreneurial-based resources are interdisciplinary by nature and require everyone involved in the collections lifecycle to think beyond their traditional roles. This provides an opportunity to form cross-disciplinary teams in and outside of the library that may include librarians from other units, data curation specialists, and faculty or administrators of various programs or offices on campus. Another potential avenue is for law library consortia to collectively negotiate license, financial, and usage models with business information vendors as they do for more traditional legal research products.

Though the barriers to entry can seem high in both effort and cost, for the right user groups, access to this category of information can be both extremely rewarding and an invaluable training tool. Likewise, the challenges that their acquisition and management present can be turned into opportunities for forming new partnerships and creative funding models as the nature of legal and business research and scholarship becomes increasingly intertwined.

IT’S TIME TO LEGISLATE FOR LIBRARY ACCESS TO E-BOOKS

JACKIE MCLOUD
RESEARCH AND INSTRUCTIONAL SERVICES LIBRARIAN
INDIANA UNIVERSITY ROBERT H. MCKINNEY SCHOOL OF LAW

Since the Amazon Kindle was introduced in 2007, e-book use has rapidly grown, with 30 percent of Americans reporting that they have read an e-book in the last 12 months. In 2021, public and school libraries surpassed half a billion digital book loans, a 16 percent increase over 2020.

These statistics represent more than readership: Consider them in terms of the restrictive licensing agreements, which provide limited use at higher-than-retail costs, all so that libraries can provide access to e-books that they do not own.

Over the past two years, proposed legislation to rein in the rising costs of licensing digital content has been considered in several states across the country, including Connecticut, Illinois, Maryland, Massachusetts, Missouri, New York, Rhode Island, and Tennessee. Despite these efforts, there are no laws currently in effect. The recent decision in Association of American Publishers, Inc. v. Frosh, No. 21-3133 (D. Md. June 13, 2022), invalidated Maryland’s e-book law and exposed the tension between the rights of copyright owners and the mission of libraries to provide access to information, regardless of format.

The increasing costs of licensing digital content are exacerbating issues of equitable access to information and further stratifying our communities. Publishers and
libraries have yet to resolve the issue of what is considered a “reasonable” price for digital content. Increasing costs for digital content that is merely licensed and not owned has forced libraries to realign budgets to try to accommodate patron demand. At the same time, publishers have structured licensing agreements to stave off feared cannibalization of consumer sales.

Maryland was the first state to introduce and unanimously enact a library e-book law on May 30, 2021, codified at Md. Code Ann., Educ. §§ 23-701, 23-702, effective Jan. 1, 2022. In response to the new Maryland e-book law, the Association of American Publishers (AAP) filed a lawsuit on December 9, 2021, asserting that Maryland’s e-book law was unconstitutional and preempted by the federal Copyright Act. At issue in the Maryland law was a compulsory licensing condition that required publishers who license electronic literary products to the public to offer those same products to libraries on reasonable terms.

AAP prevailed in its efforts to block Maryland’s e-book law. First, the court issued a preliminary injunction on February 16, 2022. The court reasoned that the “shall offer to license” requirement interfered with publishers’ exclusive right to distribute their copyrighted works under the Copyright Act, reasoning that “[i]t is a forced transaction between publishers and libraries effectively strips publishers of their exclusive right to distribute their copyrighted work—a right that necessarily includes the right to decide whether, when, and to whom to distribute.” A few months later, on June 13, 2022, the court issued a declaratory judgment that Maryland’s e-book law was unconstitutional and unenforceable, as it conflicts with and is thus preempted by the Copyright Act.

New York followed as the second state legislature to pass bipartisan library e-book legislation. Like Maryland’s e-book law, New York’s e-book bill had a compulsory licensing condition. These efforts were defeated when Governor Kathy Hochul vetoed the bill on December 29, 2021, citing a belief that provisions of the bill were preempted by federal copyright law. “While the goal of this bill is laudable,” Hochul stated, “unfortunately, copyright protection provides the author of a work with the exclusive right to their works. As such, federal law would allow the author, and only the author, to determine to whom they wish to share their work and on what terms.” The bill was returned to the New York State Assembly and has been tabled.

Early setbacks in Maryland and New York have caused state legislatures and library advocates to rethink their efforts, as other states have used the same or similar language as the Maryland and New York library e-book bills. To this end, Library Futures, a digital library policy and advocacy organization, has drafted model legislation based on consumer protection, contract law, and procurement law to overcome any Copyright Act preemption issues. The Access to E-Books Draft Legislation omits any requirement that publishers who license to the public must also offer to license to libraries. Instead, the model bill focuses on the terms of the licensing agreement, proscribing select contract provisions. For example, a contract shall not contain a provision requiring the library to license electronic literary material at a price greater than consumer pricing for the same content. As advocacy groups for publishers continue to oppose these efforts, the next challenge will likely be whether contract restrictions imposed by state law will be preempted by the Copyright Act.

These efforts by state legislatures and library advocates highlight the current imbalance of power that favors publishers in the marketplace. It can be argued that this shift occurred in the aughts, with the launch of Amazon Kindle in 2007 and the normalization of licensing e-books. Shifting from ownership to mere access to digital content is problematic because it circumvents the purpose of the U.S. Constitution’s Copyright Clause and the first sale doctrine.

The first sale doctrine was established by the U.S. Supreme Court in Bobbs-Merrill Co. v. Straus, 210 U.S. 339 (1908). The Bobbs-Merrill Company owned the copyright in The Castaway, and argued that a copyright notice restricting the retail sales price for the book to one dollar was within its right to vend under the Copyright Act. Disagreeing, the Court held that once the copyright holder sells the work, the right to vend is exhausted and no further limitation may be imposed.

A year later, the first sale doctrine was codified in the Copyright Act of 1909. It was later recodified in the Copyright Act of 1947 and the Copyright Act of 1976. As currently codified, the first sale doctrine provides in part that “the owner of a particular copy or phonore-
cord lawfully made under this title, or any person authorized by such owner, is entitled, without the authority of the copyright owner, to sell or otherwise dispose of the possession of that copy or phonorecord.” Simply stated, the creator’s limited monopoly expires with distribution of the work (e.g., a lawful sale). However, licensing agreements mandated by publishers frustrate the purpose of the first sale doctrine by joining intellectual property with physical property interests.

It is worth considering that, even before the U.S. Constitution was ratified in 1788 and the first sale doctrine was established in 1908, lending libraries existed in the United States. While there is some debate about which was the very first public library, the American Library Association recognizes the Library Company of Philadelphia, founded by Benjamin Franklin in 1731, as one of three libraries thought to be the first subscription or lending libraries in the country. Whether based on membership or freely open to the public, libraries have been lending materials in their collections and ensuring access to information for centuries. Now, libraries must contend with restrictive licensing agreements that frustrate their core mission and ultimately harm society.

Countering this, state legislatures have interceded on behalf of libraries to restore the balance that existed under the law before the normalization of restrictive licensing agreements. In addition to state efforts, Congress has taken note, as well. In 2021, a Senate investigation was launched into the terms of the licensing agreements used by the “big five” publishers, as well as e-book aggregators and platforms.

In light of the recent decision in Association of American Publishers, Inc. v. Frosh, it is prudent that libraries and their supporters call on Congress to advance the interests of libraries. Library supporters should also consider joining the Library Futures community to advocate on behalf of libraries. While these issues are gaining momentum, there remains much to be done.

**CRIV SHEET SUMMARIES / 2022 AALL ANNUAL MEETING EDUCATION PROGRAMS**

The 115th Annual Meeting & Conference of the American Association of Law Libraries was held in Denver, July 16–19, 2022. The theme was “Advancing Justice for All.” In Volume 44, No. 3 of The CRIV Sheet (June 2022), CRIV was happy to recommend several programs for this Conference. In this issue, we follow up with program reviews of four of those recommended programs as part of our CRIV Sheet Summaries. All the reviewed programs were recorded, and their titles below link to audio of the session (accessible to registered Conference attendees).

**BRINGING THE LAW LIBRARY TO THE COMMUNITY: ACCESS TO JUSTICE WITH REMOTE SERVICES**

**JEANNE PRICE**
ASSOCIATE DEAN FOR ACADEMIC AFFAIRS & DIRECTOR OF THE WIENER-ROGERS LAW LIBRARY, UNIVERSITY OF NEVADA, LAS VEGAS

Coordinator: Sarah Larsen (Minnesota State Law Library)
Moderator: Catherine McGuire (Thurgood Marshall State Law Library)
Speakers: Cathryn Bowie (State of Oregon Law Library) & Karen Westwood (Hennepin County Law Library)

Focusing on the use of remote services to strengthen and enhance the value of law libraries to the communities they serve, this program highlighted the work of two government law libraries that have undertaken very different projects. In one case the work preceded the pandemic and, in the other, the program was developed.
in reaction to the pandemic. Both projects grew out of a rethinking of the nature and needs of the community and the ability of the libraries to most efficiently and completely address those needs.

The program began with a description of the initiatives undertaken by the State of Oregon Law Library and the Hennepin County Law Library, followed by questions from the moderator about the motivation, inspirations, and evolution of the initiatives, as well as the collaborations that led to the projects’ success. The program ended after attendees broke into small groups to discuss and then report on the potential opportunities and challenges of similar programs in other contexts.

Cathryn Bowie described the State of Oregon Law Library’s work with the Department of Corrections and the types of assistance and resources traditionally needed by and made available to incarcerated individuals in the state.

Remarking on the efforts and time expended by the State Law Library in replying to those requests in print, Bowie noted that the responses often reached the individuals too late to help them, meaning that a significant amount of staff time had not been well used. In 2016, the State of Oregon Law Library reached out to the Department of Corrections to better understand the needs of incarcerated individuals and the resources available to them. Thanks to funding provided by the state, the law library determined to cover the costs of the licensing fees associated with legal research databases for the Department of Corrections across the state.

With monies freed up thanks to the State Law Library, the Department of Corrections created a secure, cloud-based, internet architecture to support the maintenance and use of those legal research databases. The platform was tailored to the needs of both incarcerated individuals and the Department of Corrections. The State Law Library worked closely with the Department of Corrections, vendors, and most importantly, adults-in-custody (who serve in paralegal-like roles in the prisons) to ensure that the platform created by the Department of Corrections—and the databases made available on it—supported the research needs of the individuals in custody and that those individuals and their advisers knew how to use those resources. For the first time, the adults-in-custody were actively engaged in a decision-making process within the prison.

Karen Westwood described the Hennepin County Law Library’s participation in a program that responded to the transition of state court services to online formats during the pandemic. A legal services provider originally proposed using CARES Act funds to purchase and place computer kiosks in libraries and other publicly accessible locations around the state. Those computers would facilitate the public’s interactions with the court system throughout and beyond the pandemic.

Some initial skepticism on the part of the law library was overcome when patrons who would have otherwise been unable to attend court processes were seen virtually interacting with their attorneys and their lawyers, thanks to the CARES Act-funded computer kiosks located in the library. In addition to being available for remote attendance at court, the computers were also used by the public as legal research tools. Even after the reopening of the courts’ in-person services, the computers were described as “game-changers” for those who had difficulties getting to court for any reason.

Both librarians noted that much of the success of their programs was due to the strength and scope of their collaborations with vendors, government agencies, and public-service providers. The programs also opened new avenues for collaboration going forward and resulted in unexpected benefits, including the growing self-confidence of both the adult-in-custody and other individuals in prisons, as well as members of the public who were initially unfamiliar with the availability and use of remote services and technology.

The program concluded with attendees’ comments and questions, many of which focused on the staffing and financial resources required for these sorts of programs, the application of the many lessons learned in other contexts, and the expansion of these types of programs into new areas (e.g., mental health institutions).
It can be hard to keep up with constant changes in technology. Presenters at the annual Cool Tools Café showcased tech tools they are currently using in their libraries and shared how they are using them. Attendees learned why the technologies are useful, how they work, and how they can be implemented. The featured tools can improve collaboration, instruction, productivity, presentation, and reference.

Attendees from various types of law library settings and varying experience levels gained valuable insight to improve productivity, services, and instruction. Let’s take a closer look at some of the tools.

**Calendly**

Dan Blackaby (University of Hawai‘i, Richardson School of Law)

Calendly is a calendaring tool that integrates with Google calendar. It allows a user to select the time and duration of a meeting. The user can set their availability, include buffers, and generate a QR code for scheduling. The presenter allows students to schedule a time and duration of meetings within predefined parameters.

**PowerNotes**

Kenton Brice (University of Oklahoma College of Law)

Organize your internet research with PowerNotes. You can create digital notecards sorted by projects, topics, or outline. Add your notes, highlight html documents, download in Microsoft Word or Excel, and share. It can also add citations.

**Workflowy**

Shay Elbaum (University of Michigan Law School)

Organize your work with Workflowy. Write, drag, and drop files and images to create an outline, to-do list, process, etc. It’s next-level organization for your institution.

**Tango**

Rebecca Fordon (The Ohio State University, Moritz College of Law)

Tango has a Chrome browser extension that allows you to capture screenshot images with one click, so you can quickly create how-to guides showing how to get to a resource and how to use it.

**RescueTime and Timely**

Debbie Ginsberg (Harvard Law School)

RescueTime is personal time management software. It allows you to see how you’re spending your time and provides tools for limiting distractions and increasing productivity. There’s a desktop and mobile app to track what you’re doing. Timely can track your time and projects. Assign a value to tasks to see the value of where you’re spending most of your time. Book your free time to gauge work-life balance. There are several potential applications for this tool.

**Screencastify**

Emily Hoffman (North Carolina Central University School of Law)

Screencastify is a freemium app that lets you create, edit, and share videos up to five minutes in length for free. There is also a paid version. It can capture answers to commonly asked reference questions to easily share with faculty and students.

**Goosechase and LibWizard**

Caitlin Hunter (UCLA School of Law)

Goosechase is a popular app used in K-5, but can also be used with new law students and attorneys for creating scavenger hunts for library orientation. LibWizard may be used for research tutorials. You can embed a database in a quiz to teach or test research skills.
Perusal
Gordon Russell (Lincoln Memorial University, Duncan School of Law)

Perusal is a social reader discussion forum. It encourages students to read the assigned material. As they read the textbook, they can add comments to the discussion forum.

Prezi Video
Julie Tedjeske Crane (Penn State Dickinson Law)

Prezi Video allows you to present while sharing your content and an image of yourself presenting that stands out. You may present live or record a presentation to share later. You may import PowerPoint and Google slides or use Prezi templates for additional features such as animation and Zoom integration. There is more functionality when using the desktop version.

Airtable
Sarah Woloschuk (University of Michigan Law School)

Tracking publisher permissions can be a daunting task but using AirTable for project management allows hundreds of publishers to be tracked using a collaborative tracker.

THE FUTURE OF LIBRARY COLLECTIONS: COLLABORATING TO BECOME BETTER BUILDERS
CYNTHIA CONDIT
HEAD OF FACULTY AND ACCESS SERVICES & PROFESSOR OF PRACTICE
UNIVERSITY OF ARIZONA COLLEGE OF LAW LIBRARY

Coordinator/Moderator: Michele Knapp (University of San Diego School of Law)
Moderator/Speakers: Andre Davison (Orrick Herrington & Sutcliffe LLP), Michael McArthur (Duke University School of Law) & Dawn Smith (Yale Law School)

In a collaborative call to action, the panel of speakers emphasized that working together across libraries is key to effectively managing the challenges facing library collections today. The panelists built on their AALL 2021 presentation to address collection challenges that librarians face now and how to tackle them. The discussion started with managing budgets.

“Today, we’re building. Put on your builder’s hats,” exhorted Andre Davison, as he laid out challenges to working with budgets—the foundation of a library collection. “The number one challenge to building a budget is predicting future pricing and institutional needs.” Closely aligned is the second challenge of advocating for funds and resources. “When you advocate for your library, it is important to have all your information collected and ready, be prepared,” said Davidson.

The third challenge is managing user and stakeholder expectations. Davison offered a lesson he took from his home buying experience. His builder provided him with a customer success manager who he could call with questions and concerns. The customer success manager ensured that Davison had a great customer experience during the home building process. “Librarians need to be similar customer success managers, and ensure their patrons have a successful experience when using the library’s collection,” said Davison.

Institutional red tape, not surprisingly, is a fourth challenge. Davison recalled a contract he was waiting to execute, but the person who he needed to approve the contract was on a long vacation out of the country. Waiting, frustrating as it can be, is sometimes part of the process. The librarian needs to be flexible; anything can change at any time.

Finally, the fifth challenge is ensuring that all library systems are compatible and can talk together. Interoperability is key for passing data along through the system, allowing for transparency, usage statistics, and more.

We all face these challenges. But the bigger question the panelists asked attendees is: How are we resolving these challenges? Going solo is an option. However, working with colleagues can spark new ideas for resolving challenges. Davison mentioned, as an example, something he learned from panelist Mike McArthur...
about using an evidence-based acquisitions approach. McArthur also suggested that tracking spending would be more valuable with a story behind the data and information and should be done frequently. Now, Davison said, he works on his budget year-round and presents reports to his executive committee monthly.

Move outside your “bubble type of library.” The panelists pointed out that as we all shift and re-arrange to determine what we will buy, store, and preserve, we need to collaborate and talk with others. The bottom line is participating as a community member—whether a government library, firm library, or academic library—because what is at stake for one is at stake for all.

The attendees broke into group discussions to consider challenges they faced and to come up with ways to approach these challenges. Some talked about journal repositories and who is responsible for developing them. Others discussed how to manage stakeholders who want expensive print or electronic materials. One table considered licensing versus ownership issues. Another group addressed the question of who was going to take on the task of archiving and preserving resources.

Attendees provided varied and useful solutions to issues. For instance, when faced with making cuts, especially if receiving pushback from stakeholders, one group suggested being transparent and sharing the cost of the resource. Then offer to renew for one additional year while locating an alternative resource. After identifying an alternative, work closely with the stakeholder and help them successfully adopt the new resource.

If you know your stakeholders well—what they are researching and writing—the collection will look more like what aligns with their work.

The issue of archiving print materials loomed large in the conversation. With libraries eliminating and discarding their print collections at a rapid pace, the question was raised: Where will law firms and others go to find citations to older secondary sources? One attendee mentioned the NELLCO task force tool kit designed to help librarians talk to vendors about this issue. Another cautioned attendees to remember that vendors are not librarians. Vendors need librarians to partner with them. Unless librarians seek out for vendors and initiate conversations, the archives will look different from what they are now.

Clearly, the community collaboration exhibited in the presentation and ensuing discussion provided new and helpful information. In concluding the presentation, the panelists urged attendees to continue to think about ways to get more involved, including developing more programming on library collections.

More significantly, the panelists encouraged attendees to continue contributing to the larger conversation. To keep the conversation flowing, the panelists created a Slack channel: The Future – Library Collections. Contact any of the panelists for more information.

Before it’s too late, let’s continue to collaborate!

WIKIDATA: A NEW TOOL TO ENHANCE ACCESS TO LAW LIBRARY COLLECTIONS (DEEP DIVE)

CHRISTY SMITH
HEAD OF COLLECTION SERVICES
SETON HALL UNIVERSITY SCHOOL OF LAW

Coordinator/Moderator: Karen Selden (University of Colorado Law School, retired)
Speakers: Joe Cera (UC Berkeley Law), Jake Kubrin (Stanford Law School) & Chris Long (University of Colorado Boulder)

The presenters at this Deep Dive introduced the audience to Wikidata. They explained the elements of Wikidata structured metadata and then discussed how they are using Wikidata for library-related projects.

Wikidata is based on structured metadata that is made up of six elements: items, statements, properties, identifiers, qualifiers, and references. Humans and bots can enter and edit information.
Items represent things such as a person, an organization, a topic, a concept, or a work. Items contain a unique identifier, known as a Q number. Items also include labels, descriptions, and aliases.

Statements are how information about an item is recorded in Wikidata and they are based on triple statements: item-property-value.

Properties describe the data value of a statement and can be thought of as a category of data. For example, for the item AALL, the property “instance of” has the data values of organization, library association, and nonprofit organization. AALL is an instance of an organization, a library association, and a nonprofit organization. Properties also have unique identifiers, known as the P number. Each property has a P number, a label, a description, an alias, and a data type which defines the kinds of values that can be used with that property (e.g., a date or other Wikidata items).

Qualifiers can be used to provide more detail about a certain statement and allow statements to be expanded upon or contextualized beyond what a simple property value can express. Examples of common qualifiers can include start time, end time, or language of a work.

References point to specific sources that back up the data provided in a statement. Every fact asserted should have a supporting reference that can be used to verify the fact.

Wikidata has a robust query function that uses SPARQL, and it can be useful for a variety of projects. Users can query the various elements of the Wikidata record.

An audience member asked if there was concern about other people or bots editing the Wikidata in the records the panelists created or edited. It can and does occasionally happen, but the impact of changes has not been significant.

After discussion about Wikidata structure, the moderator then asked the panelists six questions which allowed each panelist to discuss projects for which they are using Wikidata.

Chris Long discussed the University of Colorado-Boulder Norlin Library’s project of creating and editing Wikidata for their Women Poets of the Romantic Period collection, with the works of about 200 poets. The pilot project started out as a NACO (Name Authority Cooperative Program of the Program for Cooperative Cataloging) project, where catalogers were helping to create NACO authority records, but it evolved into a Wikidata project. They created 86 new Wikidata items and they updated records for authors if there was already a Wikidata item for the author. They added birth/death dates, gender, and other missing information that was applicable. The outcome was an enhanced presence for the poets.

Chris and his team created their Wikidata information by filling out the Wikidata forms. They also batch-loaded metadata using .csv files.

A future project on his list is to enhance Wikidata items for their faculty and make sure they are all affiliated with the University of Colorado Boulder.

Joe Cera discussed his project with the Berkeley Law institutional repository. He was looking for an identifier system for their faculty members. The system had to allow every faculty member to have an identifier in the same system and it had to be free and easy to use. The identifier had to also capture name variants.

He added most of his data using OpenRefine. He started with a spreadsheet of data and tried using AirTable and added some extra fields, but it did not work well. He added Wikidata information to the spreadsheet. He created a schema to add Wikidata identifiers for those who did not have one.

For maintenance, Joe reviews the Wikidata records annually. Other users can edit the data at any time, but this is unlikely.

A future project on Joe’s list is to link to journal websites.

Jake Kubrin discussed his project of enhancing Wikidata records for law school alumni featured in Stanford’s Women Trailblazers in the Law project. He added Stanford Law School as the alma mater, and he added permanent URLs for the oral histories for each alumna.

Jake also used OpenRefine to upload metadata into Wikidata records. Before doing this, he was able to measure record quality of the alumni records prior to updating. After he enhanced the Wikidata records, the measure of quality increased, but not dramatically.

A project down the road is to add the URL for the faculty bibliography to the Wikidata items for faculty members.
The panelists provided links to other useful resources to learn more about Wikidata and OpenRefine:

- Wikimedia training site

- Learn Wikidata (Vanderbilt University)

- Learn to Use OpenRefine and Wikidata

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 Bloomberg Law and LexisNexis.

CRIV / BLOOMBERG LAW SEMIANNUAL CALL

THOMAS E. HEMSTOCK
RESEARCH, INSTRUCTION AND ACQUISITIONS LIBRARIAN
ALBANY LAW SCHOOL

Date: Wednesday, June 15, 2022

Participants: Mike Bernier (Director of Library Relations, Bloomberg Law), Michelle Hook Dewey (AALL Executive Board Liaison to CRIV), Kristyn Hyland (Bloomberg Law), Tom Hemstock (CRIV Liaison to Bloomberg Law) & Vani Ungapen (Executive Director, AALL)

**Prior Business** – None

**Current CRIV Member Issues with Bloomberg Law** – None

Mike Bernier and Kristyn Hyland reported on updates and recent changes to Bloomberg Law.

**Practitioner Tools**

- Bloomberg Law continues to enhance its collection of practitioner tools. New content development in this category includes 325+ new Practical Guidance documents so far in 2022.
- New *Tort Defenses Practical Guidance*—a companion to the *Tort Actions* and *Tort Damages and Relief* coverage, including state-specific content for defenses to claims such as negligence, breach of fiduciary duty, defamation, and fraud.
- *State Allocation of Liability Chart Practical Guidance* provides insight into a client’s level of risk in a negligence case. This chart quickly identifies the theories of liability applied by each state and DC.

**Transactional Tools**

Enhancements available in the Transactional Intelligence Center continue and now include:

- **How to Use Transactional Tools & Features**
  Practical Guidance is designed to help lawyers unlock the value of Bloomberg’s transactional tools and resources, including descriptions of how the tools work, common use cases, pro-tips, and more

- **Marketing & Digital Rights Practical Guidance**
  provides sample language, drafting tips, and precedent searches to assist Bloomberg Law customers with drafting and negotiating common forms of marketing and engagement agreements that involve digital rights.

**Litigation Tools**

- Market-leading *Bloomberg Law Dockets* is a mainstay of Bloomberg Law’s litigation offering and has had several recent enhancements.
- Enhanced docket search with new filtering options (Resolutions, Class Action, County Courts, and new csv fields when downloading search results (e.g., nature of suit, cause of action)).
- Enhancing docket search is a key priority for 2022 with more to come.
Books & Treatises

• Bloomberg Law will add 40+ new Books & Treatises in July from leading publishers including ABA and James, strengthening the litigation reference library. A MARC record update in July will cover the changes. Contact Matthew Newton or Mike Bernier to be added to Bloomberg’s MARC record update distribution list.

Practice Area Coverage

Bloomberg Law continues to strengthen practice area coverage with important enhancements.

Labor & Employment

More state coverage because of user feedback:
• Employment-at-will Chart Builder, 50-state coverage helps users answer specific questions with customized charts and topics
• Labor Laws: Public Sector Chart Builder, provides information on state provisions that apply to labor relations and collective bargaining between government employers and unions that represent employees in the public sector
• Tortious Interference in the Employment Context, includes topical, state-by-state coverage

Environmental, Social, Governance (ESG)

• New industry-specific ESG guidance including a Financial Services ESG Toolkit, Practical Guidance, and Technology Industry ESG Toolkit, Practical Guidance added to coverage on the ESG practice page

Banking & Finance

• New Crypto news channel, providing coverage of legal, tax, and business developments in the world of digital currency
• State Digital Currency Chart Builder, updated to reflect a variety of regulatory schemes such as regulation as a security or a money transmission
• New and improved Federal Securities Class Action Tracker and Financial Technology Developments Tracker

Tax

• Redesigned practice group landing debuted June 21.
• Ready-made OnPoints presentations on key tax developments are new, allowing practitioners to use and edit presentations on key tax developments.

Law School Innovation Program

Bloomberg Law has launched a law school innovation program to highlight innovative efforts to teach future lawyers.

Law School Innovation Program identifies and promotes law school programs that are helping students transition successfully to legal practice. Applications are now open and will close on September 6, 2022. Bloomberg Law’s law school representatives can answer any questions, and the organizers of the program will be at AALL 2022.

AALL

Bloomberg Law will be present at the AALL Annual Meeting to highlight what’s new with Bloomberg Law and to answer any questions. Librarians wishing to sign up for time to meet with a representative of Bloomberg Law before the conference should reach out to Mike Bernier.

CRIV / LEXISNEXIS SEMIANNUAL CALL

ASHLEY AMES AHLBRAND
ASSISTANT DIRECTOR FOR PUBLIC SERVICES
INDIANA UNIVERSITY MAURER SCHOOL OF LAW

Date: Thursday, June 30, 2022
Participants: Ashley Ahlbrand (CRIV Liaison to LexisNexis), Carolyn Bach (Manager, Knowledge & Research and Faculty Programs, LexisNexis), Michelle Hook Dewey (AALL Executive Board Liaison to CRIV), Vani Ungapen (Executive Director, AALL) & Simon Weierman (Senior Director, Segment Management, LexisNexis)

The semiannual vendor calls provide an opportunity for the CRIV vendor liaison to discuss and follow-up on any requests for assistance that have come in from AALL members related to that particular vendor and provide an opportunity for the vendor representatives to apprise CRIV, and, by extension, the AALL membership, of any recent product updates since the last call. CRIV has not received any requests for assistance pertaining to LexisNexis® in the last six months, so the call consisted of news and product enhancements, released between January and June 2022.

**New Developments**

- First commercial launch of Lexis+® UK to small/mid law customers
- Lexis® Create, a new solution designed to surface insights for attorneys while drafting in Microsoft Word is set for Beta testing in Q3 2022
- Acquisition of Contract Lifecycle Management Solution Parley Pro to complement LexisNexis’ industry-leading Enterprise Legal Management (ELM) platform, CounselLink®
- **API Developer’s Portal** a self-service portal that allows law firms and legal departments to integrate unmatched legal data, content, and analytics from a variety of LexisNexis® applications and data sources into their existing systems, applications, and processes
- NetDocuments commercially released “Highlights” powered by LexisNexis® to the small legal market. This is the significant milestone in an 18-month collaboration where LexisNexis enrichments are incorporated directly into NetDocuments’ document management solution

**The Lexis+® Experience**

- Shepard’s History at a Glance: Displays a visual of the cases that impact or are impacted by your Shepardized case. Use it to quickly find the cases that tell you whether it is still good law from an appellate history perspective
- Ability to filter Shepard’s reports using Motion Type filters on Lexis+
- Recommended secondary articles & resources in association with LexisNexis Headnotes
- Hotkeys were enabled in Lexis+ documents for improved accessibility
- Codes research: Cited Law Preview to get an advance understanding of cited laws without leaving your current document
- New Pending Regulations feature to quickly identify and review pending & adopted regulations impacting federal and state administrative codes
- Merging of “sub-content type” post filter under high-level content types to more quickly and easily narrow to results of interest on Lexis+
- Brief Analysis: new “upload text” feature to get recommendations from cases, practical guidance, treatises, or find similar briefs without requiring an entire document
- Access to initiate Brief Analysis directly from a brief, pleading, or motion on Lexis+
- MLex regulatory news and analysis integrated into Lexis+ Legal News Hub
- Support to select and deliver the full document page for greater efficiency in the research workflow
- Lexis+ Copy with Cite: support for accurate pinpoint citations when a quote is within a footnote
- Lexis+ awarded Best AI Enabled Content Solution, 2022 SIIA CODiE Winner
- Coming soon: Fact & Issue Finder for Lexis+

**The Lexis+® and Lexis® Services – Content Additions**

- New caselaw source to U.S. for American Maritime Cases (“AMC”) that includes new AMC cases released by Lexis since the acquisition of the AMC content portfolio in 2020
• New caselaw source to Lexis+ for Vaccine Cases in the U.S. Court of Federal Claims
• Expanded statute indices with over eight states released and an additional 40 statutory indices targeted for rollout in 2022
• 1.4M new trial orders, briefs, pleadings, and motions have been made available year to date
• 400K+ state trial documents were added, many from major metropolitan areas in California, Texas, Georgia, and Nevada
• Added access to Laws & Regulations for Switzerland & Luxembourg laws, access to Singapore statutes

Practical Guidance
• A new Healthcare practice area was launched
• Lexis+® Practical Guidance Video Center released with 180 videos guiding users on legal tasks
• Usability improvements to eliminate entry of Client ID when utilizing Practical Guidance on Lexis+ (based upon customer preferences for Cost Recovery)
• New “suggested documents” for quick access to relevant documents when entering a search
• See more of what’s new from Practical Guidance in Q1 2022

The Lexis® CourtLink Service
• Launched Alaska court coverage and added coverage for 30 new state courts across five states

Lex Machina®
• Approximately 400,000 federal courts of appeals cases added in support of the launch of Legal Analytics for federal courts of appeals (“Appellate Analytics”)
• Launched multiple industry trend reports (available to non-subscribers)
  • 2022 Patent Litigation Report exploring the latest patent litigation trends
  • 2022 Law Firms Activity Report on the most active law firms in federal district court in 16 practice areas
• 2022 Securities Litigation Report providing analysis of trends in cryptocurrency cases and the impact of COVID-19, and more

Intelligize®
• Released their Climate Change Disclosure Report which examined comment letters issued by the SEC to companies both before and after the agency’s Division of Corporate Finance published a sample comment letter on climate change-related disclosure in September 2021, which updated guidance from 2010

Nexis Newsdesk™
• Groups feature for admins to create groups and easily share feeds/searches with users
• Support to download “Insights” including charts and graphs in PDF format
• Favorites option added to Saved Content Panel
• Ability to Download Newsletter Usage Data
• Geographic Results Map shows the specific region where your results are found
• Environmental, Social, and Governance News Tracker (complimentary)
• Nexis Newsdesk Mobile App Overview Video

Resources for Legal Information Professionals:
• LexisNexis® at AALL 2022
• Summer Associate Training Resources
• Federal Legislative History Research Guide
• LexisNexis® War in Ukraine Resource Page
• Coverage of the Dobbs decision from Law360®

Lexis+ Certification Program: Available for your law firm’s information professionals. Please contact your LexisNexis Knowledge & Research Consultant to learn more.