

Law Librarians

in the new millennium

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A publication from West Librarian Relations

It's All About Work Flow

by Jay Shuck, *West Customer and Product Documentation*

The daily tasks of the business, M&A, or securities lawyer lie at the core of Westlaw® Business, powered by GSI®.

One of the exciting developments to emerge from Thomson's 2005 acquisition of Global Securities Information, Inc.® (GSI) is Westlaw Business, unveiled at the 2007 American Association of Law Libraries conference.

What is Westlaw Business, exactly?

Westlaw Business is a new business, securities, and mergers and acquisitions (M&A) research platform powered by GSI. For the lawyer, the chief benefit of Westlaw Business is that it dovetails with typical work flow, thus making



Westlaw Business LIVEDGAR® Center

legal research and advocacy easier and more productive. For the law office administrator, it offers easier ID and password administration, detailed user activity reporting, and simplified charge-back reporting.

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Dear Colleague

a letter from Lori



Lori Hedstrom
Marketing Manager
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Dear Colleague,

Education is a central theme in law librarianship. We train our users to conduct cost-effective legal and nonlegal research. We manage continuing legal education (CLE) reporting for our attorneys. We participate in local, regional, and national conferences to provide continuing education opportunities for our member colleagues, and we attend these programs for our own professional development. We seek to provide challenging, compelling workplaces for our staff members by encouraging career-long learning and teaching.

Each organization has different responsibilities around training and education, but often these reside in the library. Certainly the library staff is responsible for communicating with other departments concerning the various services and programs needed by the attorneys and other library patrons. Johanna Bizub explains the path taken by her corporate law library to support the CLE tracking and reporting requirements in New York and other jurisdictions and to obtain accredited provider status. Her library uses a wide-ranging program of technology, course materials, certificates, and evaluation forms that work together to enable individuals to better manage their educational needs.

Many of you participated in introductory events at the American Association of Law Libraries (AALL) annual meeting in July for Westlaw Business, West's new platform for business, securities, and M&A research powered by GSI. LIVEDGAR, long familiar to law librarians as a valuable resource, is joined by "centers" in which transactional materials are grouped regardless of format or source. Researchers can find checklists, current awareness articles, model documents, and the editorial analysis on which they depend, in addition to the underlying statutes and regulations that are core to transactional practice. Set up a meeting with your librarian relations manager or account manager to learn more so you can introduce your business law attorneys to this powerful new platform.

In addition to knowledge of library resources, law librarians are also expected to be business managers, preparing and controlling budgets, managing projects, and evaluating the quality of the services their library provides to the organization. Meet West Librarian Relations Manager Michele Lucero, who is based in Los Angeles. Michele found her MBA course work highly valuable when she was a practicing law librarian. Her education and experience help her work effectively with her librarian contacts.

Cheryl Kelly shares her experience in changing the library services model used by the law review editors at UCLA. Her behind-the-scenes description of the law library's efforts to provide additional help to journal staff stretches our concept of the way we teach to include creating training materials for the editors. By focusing on the production process of journals, she created a valuable program to ensure that new journal members have the tools they need to begin to make their contributions to legal scholarship.

As we look toward the new year, we take stock of our recent accomplishments and challenges and use what we have learned to make next year better. West Librarian Relations welcomes your input on programs, trainings, and topical sessions that would be valuable to you, your staff, and your organization. Please share your ideas with your librarian relations manager, and together we will accomplish great things!

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Professional Edge

One Library, 10,000 Credits

by Johanna C. Bizub



Johanna C. Bizub is the manager of the law library at Prudential Insurance Company of America in Newark, N.J. Her e-mail address is jbizub@prudential.com.

Here's how one corporate law library manages continuing education credits for the company.

Sometimes I think managers like to throw challenges to law librarians just to see what we can do with them. It's my experience that we law librarians love to prove to management that we can find answers or solutions to unusual questions. (This may explain why such questions tend to go to the library.)

For example, the Prudential Insurance Company of America was recently fashioning a way to manage and track mandatory continuing education for our legal and compliance staff. The Law, Compliance, and Business Ethics Department has 700 employees, including 250 attorneys working in law and compliance, several others who maintain their law licenses but do not practice, and associates who need continuing education for other professional licenses. Our law library is expected to track continuing education for most of them.

For years we've maintained memberships with various continuing education organizations and kept file copies of the quarterly reports that they provided. We've assisted associates in obtaining duplicate certificates; we began keeping copies of their certificates on file in the library when requests for such assistance increased exponentially. We've also centralized continuing education registrations in the law library. This process allows the law library to create quarterly attendance reports for managers and associates.

Our needs increased dramatically when New York adopted mandatory continuing legal education (MCLE) (most of our attorneys are licensed in New York). CLE participation was always high, but the demand to find more specialized programs was challenging. Our attorneys wanted us to use some of their departmental meetings and town hall forums as opportunities to deliver in-house CLE programming. We used vendors so that no one would challenge programs we created ourselves.

The Law Department had considered applying for accredited provider status in other states but never did. The New York rule change prompted us to review our internal programs and determine if they qualified as CLE based on

the New York MLCE rules and regulations. After much internal discussion, it was decided that we should apply and that the law library should manage the application process.

The process took a few months and required many discussions with the staff at the New York State Continuing Legal Education Board, but we received our accredited provider status in September 2003.

Our staff was soon buried with tasks related to proctoring the programs and managing the mountains of paperwork. We decided we needed technology to help register our associates, record their attendance, send and receive completed evaluation forms, complete the certificates, and record individual and departmental attendance.

Lotus Notes programmers helped us develop technology that allows associates to view the course descriptions via the department's CLE calendar and register for courses. Once an associate registers, the program adds the course record to his or her calendar and creates the attendance roster. Then we can simply proctor the seminar and attendance. After we note that attendance is complete, the associate completes an evaluation and is then prompted to print a CLE certificate.

The database keeps a copy of each course evaluation and certificate so that we can print duplicates on demand. The associates can access the database to register or view their "associate education" records. (All course materials are attached to the course record in PDF.) They have the ability to add program information from external organizations to their own records. We can then use the records to complete our New York year-end activity reports and create reports for department audits.

All evaluation forms are anonymous and are completed electronically. As a result, we typically receive more feedback, which helps us fine-tune the process. Associates love their ability to track their CLE records, and it is especially gratifying to receive frequent compliments on our system and database.

All of which, I'm happy to report, keeps the challenges coming our way. ♦

It's All About Work Flow *continued from page 1*

Westlaw Business contains the following three work centers:

- **LIVEDGAR**—GSI's flagship product—from which you can retrieve company information and reports, such as private and public company legal due diligence reports, analyst reports, and model documents
- the '34 Act Center, from which you can retrieve checklists for securities transactions, Securities and Exchange Commission (SEC) filings, '34 Act statutes and regulations, and more
- the M&A Center, from which you can retrieve details on thousands of public, private, and international deals, as well as model documents and analysis

These work centers of Westlaw Business share a common focus: the workflow of the business law professional. "What makes Westlaw Business very different is that it's a platform that's intended for workflow-specific research," says Juliette Tran-Ralston, director of marketing at GSI. "You never have to leave the M&A center, for example, if you're an M&A attorney."

Without needing to remember databases and identifiers or construct elaborate queries, you can gather information on a specific company or related companies, retrieve SEC filings and exhibits, find sample language addressing particular circumstances, view original documents in PDF, and gather information on comparable deals. Within a single Westlaw Business center, you are likely to find everything needed to prepare for a transaction—but without fancy searches or unnecessary sifting.

If necessary, you can even click a link to suspend the Westlaw Business session and access the Westlaw sign-on page. (Note: Separate subscriptions are required to access Westlaw Business and Westlaw.)

Select	Filing	File Date	Form Type	Period	File Number	Page	Source
<input type="checkbox"/>	10-K	10/18/07	8-K	10/10/07	001-00043	82	EDGAR
<input type="checkbox"/>	10-Q	10/09/07	S-8 F08		333-140517	17	EDGAR
<input type="checkbox"/>	10-Q	10/09/07	S-8 F08		333-140518	17	EDGAR
<input type="checkbox"/>	10-Q	10/09/07	S-8 F08		333-140519	17	EDGAR
<input type="checkbox"/>	10-Q	10/09/07	424B3		033-42109	14	EDGAR
<input type="checkbox"/>	10-K	10/02/07	8-K	10/02/07	001-00091	10	EDGAR
<input type="checkbox"/>	10-K	09/05/07	8-K	09/05/07	001-00091	11	EDGAR
<input type="checkbox"/>	10-K	08/13/07	8-K	08/07/07	001-00091	5	EDGAR
<input type="checkbox"/>	10-K	08/09/07	8-K	08/08/07	001-00091	38	EDGAR

LIVEDGAR Center result: Instant access to SEC filings and other company-specific documents

Let's take a closer look:

LIVEDGAR Center

Suppose your firm's client is considering a tender offer for a competitor. Without leaving the Westlaw Business LIVEDGAR center, you can enter the competitor's name or ticker symbol and retrieve the competitor's past SEC filings (and restrict your result to filing types you designate); view full-text documents; compile the essential documents into a single report; retrieve articles of incorporation, bylaws, employment agreements, and other documents for drafting use; and retrieve no-action letters from comparable transactions.

You can also retrieve and view prospectuses, registrations, and details of similar deals; a user-friendly template allows you to tailor your search by any of dozens of search criteria.

There is no need to know database names or identifiers—or even leave the LIVEDGAR Center.

'34 Act Center

The '34 Act Center gives you a one-stop source of filings, law, and guidance (e.g., checklists) when doing work governed by the Securities Exchange Act of 1934, such as preparing a 10-Q or other SEC filing. You can retrieve pertinent statutes, regulations, checklists, forms, and other materials simply by clicking the appropriate links. You can use Securities Navigator as an effective starting point for research that returns consolidated results from multiple types of sources. In addition, you can have exclusive current awareness drawn from *SEC Currents* articles, including disclosure trends and special industry-specific analysis.

Suppose you need to retrieve 10-Q reports filed by your corporate client's peer companies. At the '34 Act center, click **Click for Peer Search**. The Company Peer Search search page is displayed. Enter your client's Standard Industrial Classification (SIC) code in the text box, use the drop-down lists to designate location, financial criteria, or other limits, if desired, and click **Search**. A Company Picklist is displayed, with links to peer companies. Click a peer company name to retrieve links to the company's SEC filings.

M&A Center

Without leaving the M&A Center, you have access to the most comprehensive source of global public and private deal information in the industry. From here you can quickly resolve your M&A research and effortlessly keep up to date on trends and deal structures using current awareness features.

For example, suppose you want to ensure that your client's proposed merger is consistent with industry standards regarding particular provisions, e.g., earnout payments. With little more than the target or acquiring company name or ticker symbol, you can get a legal due diligence report full of background information on the company. You can then use the M&A Center–U.S. Private Deals search template (it contains text boxes, drop-down lists, and tabs to restrict your search by any of dozens of search

M&A Center search template

criteria) to retrieve comparable language in existing filings, as well as details of similar deals of peer companies.

My Account and GSI QuickView+®

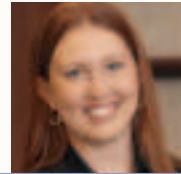
As Westlaw subscribers know, My Account is a secure, Web-based feature that allows you to perform routine account management tasks, e.g., managing your Westlaw Business passwords and getting real-time information about your account. GSI customers can currently make use of the password utility available on My Account; by the end of the year, they will have access to billing information and administrative rights functionality, as well.

GSI QuickView+ is a service provided to Westlaw Business subscribers for the purpose of estimating their Westlaw Business charges and facilitating efficient cost recovery. GSI QuickView+ has been enhanced for Westlaw Business, so that you can view supplementary detail (e.g., content and document detail) for a specific day and electronically upload firm-specific TimeKeeper attributes for Westlaw Business reporting.

For more information about Westlaw Business, call your West librarian relations manager. ☞

Bringing Journals to Self-Sufficiency

by Cheryl L. Kelly



As liaison to our student-edited law journals, my ultimate goal is to help the students assist themselves.

As a lifelong learner and instructor, I firmly believe that the best way to learn something is to teach it. This belief underlies my ongoing efforts as the UCLA law library's newly assigned liaison to the school's 12 student-edited law journals.

At UCLA, students publish 12 law journals that produce more than 20 issues per year. To ready this many pages of legal scholarship for publication each year requires a sizeable workforce. Not surprisingly, a substantial number of UCLA law students are involved with one or more journals.

The primary responsibility of academic law libraries is to support the instructional and research activities of the law school, including the publication of student-edited law journals. Our law library already provides assistance to the journals in the form of library cards, after-hours access keys, electronic reserves Web pages, and interlibrary loans. However, we reference librarians wondered whether our law journal editors would also appreciate help in the form of substantive research assistance, and I was asked to be reference librarian liaison to our law journals.

Because our law school encourages law librarians to offer legal research training sessions, I considered teaching citation checking classes for journal members. However, I knew that not all journals required the same training, and I would not be able to teach a separate session for all 12 journals.

Instead, I decided to approach the editorial boards and offer to help them develop training materials for their new staff. This way, I would be teaching the editors, they would teach their staff, and all of us would learn more in the process.

It was difficult to get in touch with the journals' editorial boards during spring semester. Each journal is independently operated and there is no history of their ever gathering in one place at one time. I e-mailed each of the new chief editors, offering to help them develop training materials for next year's new staff,

but my effort bombed. I needed a better way to get the attention of the journals, so I approached the problem from the ground up: I aimed at potential new members considering journal membership in the fall.

Although each of our journals separately distributes information about the journal at the start of a school year (at an information meeting, a table, or in flyers), there is no coordinated effort to inform first-year students about journals. I decided that an information and training session sponsored by the library might draw some potential journal members. If I invited journal editors to attend and describe their journal, I might succeed in getting the attention of the editors, too. The library was on board with my idea, so I designed a session describing to new students the typical production process of a student-run law journal and how they would fit into the process as citation checkers. I also included some very basic training on citation checking and using the Bluebook. At the end of my presentation, I called on each of the journal representatives present to speak briefly about his or her journal.

The response was overwhelming and positive, both from the 150 first-year students who came to learn from the session, and from the eight journal representatives who were able to attend and promote their journals. After the session, several of the chief editors of our journals asked whether I would be willing to instruct the journal's newly recruited members in citation checking and use of the Bluebook; several others asked me for my presentation slides. Success!

I recognized this new surge of attention as my opportunity to help the editors develop and tailor training materials for their own training sessions. By capitalizing on the opportunity, I am now achieving what I set out to do: help the students help themselves. ♦♦

Cheryl L. Kelly is a reference librarian and lecturer in law at the UCLA School of Law and a 2006 winner of a West Excellence in Law Librarianship scholarship. Her e-mail address is KELLYC@law.ucla.edu.

Your Library is Your Business

by Jay Shuck, *West Customer and Product Documentation*

For West Librarian Relations Manager Michele Lucero, the MBA and the MLIS go hand in hand.

Though the law librarian doesn't typically pursue a Masters of Business Administration degree, the profession already embraces many of the core subjects covered in graduate business school, such as marketing, organizational analysis, decision making, accounting and finance, and human resources. Many of the core competencies and specialized competencies of law librarianship identified by the American Association of Law Libraries (AALL)* overlap with business manager qualifications. For instance, AALL competencies include the following:

- Exhibits an understanding of the importance of a multidisciplinary and cross-functional approach to programs and projects within the organization (AALL Core Competencies, 1.11)
- Plans, prepares, and controls budgets and manages all financial resources (AALL Specialized Competencies, 2.2)
- Selects, supervises, evaluates, and provides for the training and development of library personnel (AALL Specialized Competencies, 2.3)
- Understands the principles of project management and organizes people to accomplish complex tasks (AALL Specialized Competencies, 2.4)
- Measures, evaluates, and articulates the quality of the library services (AALL Specialized Competencies, 2.5)

"The MBA program has been so beneficial," says Michele Lucero, an MLIS-degreed law librarian who expects to receive her MBA from the University of North Texas in May 2008. "As a first-time manager, I had no experience with accounting or my budget, how to handle personnel matters, or how to conduct performance evaluations. I have been able to apply the courses I've taken for my degree directly to my job." Lucero spent 13 years as a law librarian in the public and private sectors, including the Las Vegas Clark County Library District and law firms Mayer Brown and Weil Gotshal.

Since June 2007, Lucero is a West librarian relations manager, serving as a liaison between West and law librarians in Southern California, Arizona, Nevada, and Hawaii. "One

of my strengths in this position is that I've been there, done that. I've been a law librarian, and I've been a manager of a branch library and of other departments. I can understand issues my librarian colleagues may face, such as balancing a budget for the first time."

She believes business management principles have kept her focus on the big picture at her previous law librarian jobs and at West. "Even if you're a library branch, you're running that branch within your office—your own sub-entity within the bigger entity," she says. "I think it's important to understand how the company operates and what role you play in the bigger picture."

For Lucero, law librarians must understand how they can work as a team, regardless of organization or job title. "Librarians need to be proactive and prepared to work collaboratively with their library colleagues, management, and other offices," she says.

Consequently, Lucero has taken an outside-the-box approach when addressing the concerns of her law librarian colleagues. For example, she sought to improve the cost-effectiveness of new associate work product by conducting a presentation for UCLA law students on law firm economics—long before those students would enter the firms as associates. "I handed out information about cost-effective research to give students an idea of what it's like in the real world," she says. "I spoke from my experience—that you need to get to know your librarian, you need to understand costs and how to search cost-effectively. If new associates are prepared before they get to a firm, they save time and money in the end."

Like other librarian relations managers, Lucero is a firm believer in training throughout one's career. "I think professional development is vital," she says. "It could involve visiting westlearning.com for free Westlaw training or attending a meeting, such as a competitive intelligence seminar at your community's law library organization. Or one can contact local law librarians for networking purposes. It is taking a proactive approach to your own development." ♦♦



Michele Lucero

* American Association of Law Libraries, *Competencies of Law Librarianship* (visited Oct. 5, 2007) <www.aallnet.org/prodev/competencies.asp>.

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Case Evaluator: Jury Verdict Research Gets Smarter

For years, you've been able to use Westlaw to retrieve jury verdict and settlement summaries within a particular jurisdiction that involve a specific injury, cause of action, party, or other criteria. That hasn't changed.

What's new is that you no longer have to sift through a massive pile of documents to determine verdict and settlement trends or learn about experts and expert testimony for particular case types or injuries. The long-awaited Case Evaluator does the sifting for you.

With Case Evaluator, you can use a user-friendly search template to generate a report that brings you

- verdict and settlement trends for a particular case type or injury (such as average, median, and highest award per county or district)
- information about experts who have testified in litigation of a particular case type or injury (such as the number of cases in which each expert has testified, and on whose behalf the expert testified)

- excerpts of medical explanations and expert testimony
- links to jury verdict and settlement summaries, full-text court documents, appellate decisions, and medical illustrations and explanations

In other words, you retrieve jury verdict and settlement information, but in a form that makes it easier—and faster—to place a value on your own case, evaluate experts often involved with similar litigation, familiarize yourself with your client's medical issues, and retrieve a variety of related documents.

To access Case Evaluator, go to the Site Map on Westlaw and click **Case Evaluator Reports** under *Search Westlaw*. For more information, contact your West librarian relations manager. ☞

Case Evaluator result (detail)

Date Range: From 2002 To 2007 [Export]

Verdict and Settlement Trends
Awards by County/District (January 2002 - October 2007)

County/District	# of Awards*	% of Total	Average Award	Median Award	Highest Award
Los Angeles, California	92	25.28	\$72,961	\$18,333	\$1,029,419
Maricopa, California	10	7.36	\$34,000	\$8,844	\$661,000
Orange, California	10	7.58	\$39,279	\$18,449	\$253,536
Trinity County, California	10	7.36	\$51,190	\$18,333	\$428,000
Sacramento, California	11	5.88	\$1,012,478	\$1,000	\$9,000,000
San Diego, California	19	5.48	\$62,296	\$1,700	\$267,564
San Francisco, California	11	4.73	\$151,971	\$4,805	\$1,379,000
Santa Clara, California	11	4.33	\$170,246	\$8,333	\$1,660,000
San Bernardino, California	8	3.24	\$92,323	\$22,000	\$400,000
San Mateo, California	3	2.75	\$946,892	\$18,273	\$2,800,000
Other	48	17.05	\$81,755	\$7,500	1,694,653