

## Using Technology to Assist with the Management of Student Workers

Frances M. Brillantine, DuFour Law Library, Catholic University of America

Communication and organization are two of the biggest challenges facing librarians who manage student workers in academic libraries. Academic libraries rely on student workers to staff the library during weekends, holidays, and late into the night. How can library managers ensure that the library is adequately staffed and keep that staff well-informed? I have found that technology is a great help in this area. This article will discuss how technology can assist library managers in hiring and scheduling student workers, in keeping them informed, and by providing guides and manuals that are easily accessible. Although this article will focus on circulation desk attendants, many of the ideas discussed are applicable to student workers in other departments as well.

### Communication

One of the most important aspects of management is effective communication. Although I am responsible for the circulation desk attendants, I am often not here when they are scheduled to work, due to the late hours the library is open. Therefore, keeping desk attendants informed of policy changes or other important issues can be challenging. I could use e-mail to disseminate information to the desk attendants, but I hesitate to do that. We all receive large amounts of e-mail, so I try to reserve its use for shift requests and very important memos. I instead created a blog to keep desk attendants informed. The *Circulation and Access Services Blog* (<http://dufourcirc.blogspot.com>) has been in existence for about five years. It is the start-up Internet page on our

circulation desk computers, so it is the first thing desk attendants see when they start their shifts.

The blog originally resided on our intranet. I initially used Dreamweaver and frames to create and maintain it. This method was a bit time-consuming, so I started using Blogger about a year ago. There are a number of free blog programs available, such as Blogger, Blogster, and Blogstream. Since I am most familiar with Blogger, that is the program I'll briefly discuss here. As I'm sure many of you are aware, Blogger is very easy to use. It does not require much, if any, knowledge of HTML, depending on how customized you want your blog to look. Blogger provides a range of templates from which to choose, or you can create your own. You can host your blog on [blogspot.com](http://blogspot.com) or on your own server space. If privacy is a concern, you may want to host your blog on your intranet.

The sidebar provides space for an unlimited number of links. I keep the number of links to no more than five or six, so that only critical links are displayed. I use the blog to inform desk attendants of policy changes, changes in hours, reminders on how to perform certain tasks, and occasionally to thank them for their hard work. Although I have the "comments" function enabled, the desk attendants don't use it. They usually e-mail me with problems or questions instead. The blog has proven to be an excellent method of keeping the desk attendants informed and of providing a central location for important links. It is also a useful resource for our evening and weekend reference librarians, since much

*continued on page 5*

Communication and organization are two of the biggest challenges facing librarians who manage student workers in academic libraries. Academic libraries rely on student workers to staff the library during weekends, holidays, and late into the night.

## Taking Advantage of Modern Technology

*Dawn Bohls, Covington & Burling LLP*



Welcome to the first all-electronic issue of LLSDC's *Law Library Lights*! Given that we're taking advantage of modern technology in creating this publication, it's only appropriate that our first issue of the new *Lights* should focus on technology.

Working on this issue, I often contemplated the ways that technology has changed over just the past 20 years. When I started college, I typed my papers on a cheap electric typewriter. A few years later, I became a graduate assistant to one of my accounting professors at the University of Georgia. I soon discovered his secretary's computer with its word processing program (an early version of WordPerfect — function keys,

*continued on page 3*



Law Library

# Lights

### Deadline for Submissions

If you would like to write for *Lights*, please contact **Dawn Bohls** at [dbohls@cov.com](mailto:dbohls@cov.com). For the up-to-date information regarding the 2006-2007 submission deadlines and issue themes, visit the LLSDC Web site at [www.llsdc.org](http://www.llsdc.org).

*Law Library Lights* is published quarterly by the Law Librarians' Society of Washington, D.C., Inc. 20009, ISSN 0546-2483.

Beginning with Vol. 50, #1 (Fall 2006), *Law Library Lights* will be published in PDF format on the LLSDC Web site: [www.llsdc.org](http://www.llsdc.org). Notification of availability of each new issue will be sent to the LLSDC listserv. If you would like to receive individual e-mail notification when new issues are published, please send an e-mail to **Dawn Bohls** at [dbohls@cov.com](mailto:dbohls@cov.com).

LLSDC does not assume any responsibility for the statements advanced by contributors to *Law Library Lights*. The views expressed herein are those of the individual authors and do not constitute an endorsement by LLSDC.

## Table of Contents

### FEATURES

<b>Using Technology to Assist with the Management of Student Workers</b> <i>Frances M. Brillantine</i>	1
<b>Using Surveys to Improve Service to Students: A Comparison of LibQual+™ and SurveyMonkey</b> <i>Frances M. Brillantine</i>	7
<b>Questioning Virtual Reference</b> <i>Jennifer L. McMahan</i>	10
<b>In Search of the Perfect Library Management System</b> <i>Mary K. Dzurinko</i>	16
<b>Law Firm Librarians and Enterprise Resource Planning (ERP)</b> <i>Donald D. Coney, Jr.</i>	18
<b>WilliamsWeb — Georgetown Law Library's Intranet</b> <i>Craig Lelansky</i>	22
<b>The Pace of Change in Legal Literature</b> <i>Billie J. Grey</i>	28
<b>Reference Sources at Your Fingertips: Sheppard Mullin's Training for Legal Secretaries</b> <i>Scott Wales</i>	29

### COLUMNS

<b>Editor's Column</b> <i>Dawn Bohls</i>	2
<b>President's Column</b> <i>Billie Jo Kaufman</i>	4
<b>Book Review</b> <i>Karen W. Silber</i>	13
<b>Membership News</b> <i>Ann Taylor</i>	14
<b>Tech Talk</b> <i>Roger V. Skalbeck</i>	25
<b>Eye on Serials</b> <i>Susan Chinoransky</i>	27

anyone?) and was immediately hooked. No more Wite-Out for me!

When I graduated and went to work in Atlanta as a tax accountant at Coopers & Lybrand in 1988, we had three computers on rollable carts for the entire 20-person tax department. The audit staff had a group of “portable” Compaqs that could be taken out to their clients’ offices for audit engagements, but these Compaqs weighed around 50 pounds each, often failed to start after being hauled around, and didn’t have enough memory to be able to load more than one program at a time. By the time I left five years later, every tax professional had his or her own desktop computer. We were also able to prepare tax returns online, from start to finish — a far cry from days spent standing at a typewriter to make line-by-line changes. And the auditors were finally getting portable computers worthy of the name.

I moved to DC in 1993, intending to get a Ph.D. in medieval studies at Catholic University (a very long story!). To help support myself, I started working part time in Arthur Andersen’s library, where the librarians routinely used DIALOG and LexisNexis, with their DOS-based setups, obscure commands, and heavy, multi-volume user manuals. Within a few years, we also had a special Edgar machine on another floor for SEC filings and walls full of our collection of ProQuest CD-ROMs for periodical articles. We were definitely technology-savvy for the time!

By 1995 or 1996, the World Wide Web was starting to change everything about the way the world obtained information. In particular, the U.S. government’s decision to start making

extensive quantities of documentation available on the Web helped turn the Internet into an incomparable resource for free information. And, although they certainly weren’t free, LexisNexis, Westlaw, and other vendors compiled vast on-line repositories of materials formerly available only in print and far outstripping the collections of any single law library or academic institution in terms of the currency and extensiveness of the material available.

As law librarians today, we use technology constantly. This issue of *Lights* is intended to show you some of the ways that our colleagues take advantage of technology to help run their libraries and to better perform their jobs. Ask yourself: Are you using your intranet to its fullest extent? Do you think virtual reference might work for your customers? Would you like to conduct an electronic survey of your patrons? Do you need to choose a new library management system? Our feature articles cover these important topics. We also have an essay discussing the evolution of legal resources from print through the electronic era, and an article on ways that law librarians can be involved should their organizations take on Enterprise Resource Planning (ERP) implementation.

I hope you enjoy this inaugural electronic issue of *Lights*, and I hope you’ll consider writing an article for one of our upcoming issues. The theme for Winter 2006 is “A Day in the Life of a Law Librarian.” I hope we’ll all get a better understanding of what law librarians in different positions and different types of institutions do in the course of an ordinary day, and that we’ll come to better appreciate the wide range of talents, skills, and knowledge required across the broad spectrum of the careers comprising law librarianship.

**As law librarians today, we use technology constantly. This issue of *Lights* is intended to show you some of the ways that our colleagues take advantage of technology to help run their libraries and to better perform their jobs.**

## **Retiring Soon? Know Anyone Else Who Is? Wish You Were Retiring?**

Sorry—If you are in the third category we can’t help you, but if you are an LLSDC member getting ready to retire within the next year, you should contact the Nominations Committee to find out if you are eligible to be nominated for Life Membership. Life Membership confers many exciting benefits at no additional cost to you, and our past Life Membership nominees have a 100% election win rate. To get your name on the ballot (or to recommend someone else), contact Martha Klein at [mklein@mckennalong.com](mailto:mklein@mckennalong.com) or at 202/496-7844.

## Greetings...

“Rise to the Challenge” is the program theme for AALL 2007. Could there be a more perfect theme for the association and its individual chapters? We all face challenges every single day — both personal and professional — but we are usually focused enough to tackle them and move forward. I know each of us has endured some challenge that we thought we never could. On the job, we accomplish an amazing amount, sometimes without fully realizing how much. We assist lawyers, judges, students, faculty, librarians, colleagues, spouses, and partners in finding information. Most of us are thrilled and excited to do so, even when the request is simple (where is that bathroom?).



*Billie Jo Kaufman  
American University Law Library*

For me, one of the highlights of July’s AALL meeting was meeting the law librarians of the Chicago area being honored for their community service work with the “Spirit of Law Librarianship Award.” Individually and collectively, AALL’s Chicago-area members assisted their larger community by sponsoring events ranging from the very simple to the very complex. We as law librarians are lucky to have found meaningful work that is truly valuable; it is even better when we can share that good fortune by giving back to the community.

I know LLSDC can “Rise to the Challenge” this year as we face a number of changes. We are excited to be transitioning to an Executive Director, Bonnie Fedchock. We will confront many issues as we move from print to electronic publishing. We are now even voting online. While these changes may challenge us, I’m confident we will accomplish all of the goals we’ve set.

Please take advantage of your individual SIS and/or Focus Groups. These folks put together an amazing array of programs, socials, and other events to help you network and learn new skills.

I welcome each of you to participate in LLSDC. If you’re not on a committee and wish to get involved, let us know. Plan to attend any and all events — you’ll be glad you did. Most importantly, remember that your position makes things happen — you provide information to solve problems and find answers! We get to rise to the challenge every single day!

See you real soon!

of the blog's information pertains to the entire library, not just the circulation department.

## Guides and Manuals

I put as much information online as possible, since students seem to prefer that method of access. Although we do have a training program for newly-hired desk attendants, quick guides, manuals, and other documentation are critical to the smooth operation of the circulation desk. The DuFour Law Library's Circulation and Access Services Web site contains all of the information the desk attendants need access to, such as the *Desk Attendant Manual*, *Quick Guide to the Circulation System*, policies, etc. The *Desk Attendant Manual* and the various quick guides are also available in hard copy at the circulation desk. It is important to have your most crucial manuals and guides available in hard copy as well as electronic, just in case Internet access is not available. To make updating simple, the online versions of the guides and manual are saved as pdf documents. The Web site and all of its subsidiary links reside on our intranet. If you would like to see the Web site (subsidiary links will not work) and the *Desk Attendant Manual*, I have put copies of them here:

Web site:

<http://staff.cua.edu/brillantine/default.htm>

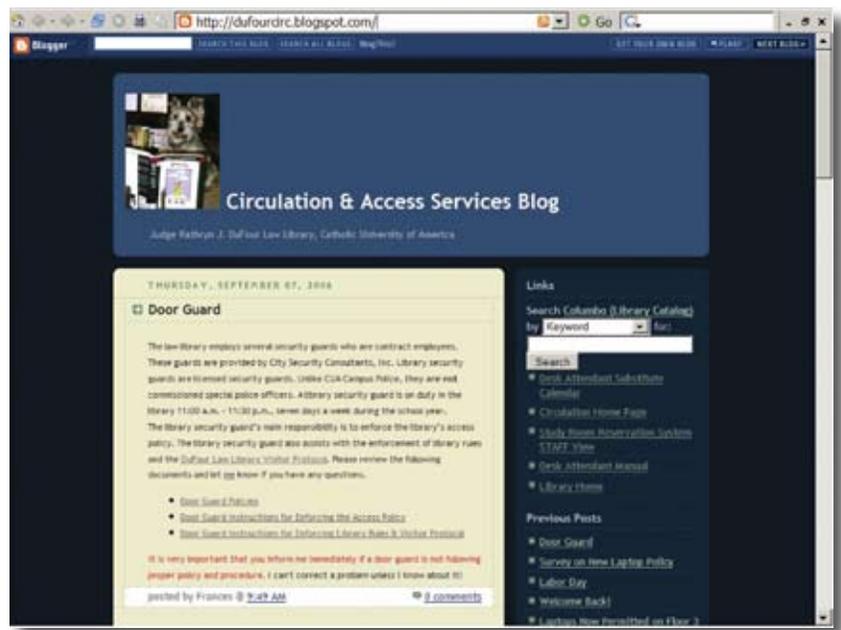
*Desk Attendant Manual*

<http://staff.cua.edu/brillantine/manual.pdf>

## Hiring

I use e-mail to expedite and streamline the hiring process. At a busy circulation desk, positions need to be filled quickly and e-mail is a big time-saver when used to receive resumes and arrange interviews. Applicants also appreciate the convenience that e-mail offers. I will and do accept resumes via other means, but the majority of our applicants prefer to apply via e-mail.

Our e-mail program, Microsoft Outlook, also enables me to keep the hiring process well-organized. I have an Outlook folder designated for hiring. I store all resumes and hiring correspondence in this folder. When I receive a resume, I respond to the applicant the same day, acknowledging receipt of the resume and informing the applicant of any positions we have open. If I want to interview the applicant,



*The Circulation & Access Services blog helps keep staff up to date.*

I list several dates and times I have available for interviews and ask the applicant to choose one. This method has eliminated the problem of telephone tag and has saved me time as well. I am able to fill vacant desk positions quickly and efficiently. Applicants also respond well to this process. Most students are very comfortable using e-mail and embrace the convenience of it.

Once I have hired a new desk attendant, I create an Outlook contact entry that includes the desk attendant's e-mail address and phone number. All desk attendant contacts are stored in one Outlook contacts folder that is designated for desk attendants. I also create a desk attendant distribution list so that I can easily send an e-mail to all of them. My staff also have access to this contacts folder and the distribution list in case they need to contact a desk attendant.

## Scheduling

A wide variety of software is available to assist with employee scheduling. WhenToWork (<http://whentowork.com>) and ScheduleWriter (<http://www.schedulewriter.com/>) are two popular examples of employee scheduling software. However, these programs are generally designed for more complex organizations and for longer shifts. They often require some tweaking to get them set up for circulation desks, which often have two- and three-hour shifts. At the DuFour Law Library, we have about 25 desk attendants and our scheduling takes place

*continued on page 6*

## Student Workers *continued from page 5*

only a few times a year (each semester and exam period). Our desk attendants work a set shift every week. Because their schedules don't change week to week, I do not find that I have a need for scheduling software. I schedule desk attendants by hand, using a simple table in Word.

E-mail is a convenient and efficient way for desk attendants to submit their shift requests to me. I designate a period of days during which I will accept shift requests. An e-mail is sent to all desk attendants with the blank schedule and instructions attached. I store all shift requests in a separate Outlook folder so I can easily track who has and has not submitted their requests. Once I receive each desk attendant's request, I create the schedule and e-mail each desk attendant his/her shift assignment.

I also use e-mail to arrange coverage for open shifts. We usually need coverage for holidays, since the library is rarely closed. I e-mail these special shifts to all desk attendants and fill them on a first-come, first served basis. I also permit our desk attendants to use e-mail to arrange coverage for shifts that they are unable to work. We do permit desk attendants to miss a scheduled shift, but only if they arrange coverage for the shift. At the start of each semester, I send an e-mail to all desk attendants that lists all desk attendant e-mail addresses and instructions for arranging coverage. Desk attendants are required to CC: me on all coverage requests and to inform me of who is working a shift for them. I use an Outlook folder designated for shift coverage requests to track who has requested coverage and

to follow up with those who have not yet arranged coverage. Once I know which desk attendant is covering which shift, I enter that information into our Desk Attendant Substitute Calendar. This is a Yahoo calendar and is used only for changes in shifts and coverage. Desk attendants can access it on or off-campus to determine whether they are scheduled to work a shift.

## Course Management Software: Another Option

Another option for managing student workers is to use course management software, such as Blackboard, LexisNexis Web Courses, or The West Education Network (TWEN). I am most familiar with TWEN, so that is the software I will briefly discuss here. A TWEN course enables you to post notices and links, create a calendar for shifts, and e-mail your student workers individually or as a group. You can set up your "course" so that an e-mail is sent to your student workers every time you post a notice. Course management software might be a good choice if you don't have much knowledge or time for creating Web pages or blogs. It enables you to have most everything you need in one spot. It does require that your student workers log in regularly, though, and read the notices. Although you can post links, you cannot make the course page your start-up Internet page.

## Conclusion

Academic law libraries rely on a large pool of student workers to staff the library and provide assistance to patrons during late and weekend hours. Effective communication and organiza-

tion are crucial components of a well-run circulation desk. The effective use of technology will ensure that your department is well-run. I hope that I have presented some good ideas for using technology to assist with the management of circulation student workers. I am always looking for good ideas myself and would love to hear any tips you have in this area. My e-mail address is [brillantine@law.edu](mailto:brillantine@law.edu). **LLL**

*The Circulation & Access Services home page provides staff with links to manuals and other helpful information.*

<http://lawlib/circ/>

### Circulation & Access Services

Judge Kathryn J. DuFour Law Library

Information, Guides & Policies	Circulation Department Full-Time Staff
<ul style="list-style-type: none"><li><a href="#">Library Security</a> (Emergency Phone Numbers, Evacuation Plan, Door Guard Info)</li><li><a href="#">Library Information</a> (Policies, passwords, etc.)</li><li><a href="#">Circulation Guides</a> (How To's, Desk Attendant Manual)</li><li><a href="#">Desk Attendant Responsibilities &amp; Rules</a></li></ul> <p><a href="#">Circulation Blog</a></p>	<p>Frances Brillantine, Head of Access Services 202-319-4331 <a href="mailto:brillantine@law.edu">brillantine@law.edu</a></p> <p>Dawn Sobol, Circulation / Interlibrary Loan Librarian 202-319-5156 <a href="mailto:sobol@law.edu">sobol@law.edu</a></p> <p>Tina McMahon, Circulation Assistant 202-319-5156 <a href="mailto:memahocm@law.edu">memahocm@law.edu</a></p> <p>Philip Venable, Collection Maintenance Assistant</p>

# Using Surveys to Improve Service to Students: *A Comparison of LibQual+™ and SurveyMonkey*

Frances M. Brillantine, DuFour Law Library, Catholic University of America

How do we academic law librarians determine whether we are meeting the needs of our students? How do we best teach them the skills that they need and make them aware of available resources? What method of teaching is most effective: pathfinders, one-on-one instruction, or workshops? Are students aware of our resources and how to use them? A survey is one way to measure our success, but what type of survey is most useful — standardized or personalized? This article will examine two popular electronic survey tools, LibQual+™ and SurveyMonkey.

## LibQual+™: A Brief Description

LibQual+™ (<http://www.libqual.org>) was developed by the Association of Research Libraries (ARL) in collaboration with Texas A&M University Libraries. It has been in use for approximately six years. For the purposes of this article, I will briefly describe how the survey is conducted. For further information, please see the LibQual+™ Procedures Manual (<http://www.libqual.org/Manual/index.cfm>).

The survey uses a three-column approach designed to identify gaps between a patron's minimum, desired, and perceived levels of service. For each question, patrons are asked to rate between 1 and 9 the minimum level of service they will accept, the level of service they desire, and the level of service they believe that they are actually receiving (see <http://www.libqual.org/Information/Sample/index.cfm> for an example). The core part of the survey contains 22 questions and covers three areas: Service, Information Control (resources and equipment), and Library as Place. An additional fifteen questions cover demographics and general satisfaction with library services. An open-ended comment box is also included. LibQual+™ permits customization for disciplines such as day student, evening student, etc. Separate survey reports are generated for each discipline that you identify.

The survey is disseminated via e-mail. You can also place a link to the survey on your library's Web site. The library is responsible for sending out the survey announcement via e-

mail. Student e-mail addresses can be obtained from your university IT department or from your ILS patron database. To increase survey response rates, LibQual+™ offers an incentives feature that enables your library to offer prizes while still ensuring the confidentiality of the survey responses.

Survey results are available one to two weeks after the closing date of your survey. The results are compiled into a report that LibQual+™ refers to as a "notebook." The notebooks (available online in pdf and in hard copy for \$150.00) are very detailed and contain a wide variety of graphs and tables. The majority of the graphs are radar charts. Information on means, standard deviation, service adequacy, and service superiority is included, with an explanation of each. Participating libraries have online access to all participants' notebooks, so you can compare your results with that of other libraries. If your institution conducts the survey as part of a consortium, a consortium notebook is also prepared. Data can be exported into spreadsheet software such as Excel, and also into relational databases.

## SurveyMonkey: A Brief Description

SurveyMonkey (<http://surveymonkey.com/>) is web-based survey software that enables users to customize surveys according to their needs. Users can select from a wide range of question types, such as single-answer, multiple answer, open-ended, etc. SurveyMonkey contains several useful features, including skip logic and filtering. For a full list of available features, see <http://surveymonkey.com/AdvancedFeatures.asp>. Design features such as fonts, colors, and logos can also be customized.

The survey is disseminated via e-mail in one of two ways. Either you can send a link to your patrons, or you can import their e-mail addresses into SurveyMonkey's e-mail List Management tool. This feature enables you to track who has completed the survey. One caveat: surveys completed via an e-mail sent using the List Management tool are not anonymous. The

*continued on page 8*

A carefully conducted survey can provide many benefits, including the appreciation that students feel, knowing that their opinion counts.

## Surveys *continued from page 7*

survey can also be accessed from a link from your Web page. Unlike LibQual+™, SurveyMonkey does not have an incentives feature. We were able to offer incentives and ensure the anonymity of survey respondents by creating a second survey that asked just for the respondent's e-mail address. When respondents clicked "Done" on the main survey, they were directed to a page that invited them to enter a prize drawing.

Results are compiled and available immediately, as respondents complete the survey. Results are available in simple bar graphs with a button to view comments. Survey results can be exported into spreadsheet software such as Excel, and also into relational databases.

### LibQual+™ and SurveyMonkey: Pro and Con

#### Survey Questions

LibQual+™ does not require you to write any questions and little preparation is required to launch the survey. SurveyMonkey does require that you write your own survey questions. This

difference can be a pro or a con, depending on your view. Some of the LibQual+™ questions are vague and not very helpful in identifying areas that need improvement. Without follow-up (such as student focus groups or roundtable discussions), it is often not possible to determine what a score means for your library. For example, one LibQual+™ question asks patrons to rate the library as "a gateway for study, learning, or research." These are three very different aspects of the library and it can be difficult to interpret the reasons behind a score. If the score is low, is it because students feel that the library is not conducive to study? If not, why not (too noisy, cramped, cold)? Are the resources inadequate for the library to be a gateway for research? If yes, which resources are inadequate, print or electronic? SurveyMonkey enables you to write your own questions and to be as specific as necessary. A comments box can be added to each question, which will further assist you to understand why a respondent selected a particular answer.

#### Format of Questions

The LibQual+™ three-column format for questions is sometimes viewed by respondents as confusing and too time-consuming. LibQual+™ provides a great deal of research to support the idea that the three-column approach provides a more accurate rating. The reason for this format is that it better enables you to determine what areas are most important to your users and whether you are meeting their expectations.

The three-column format is not available with SurveyMonkey. Again, this difference can be viewed as a pro or a con. While perhaps not as accurate as the three-column format, carefully written questions can help you to determine what areas are important to your patrons and whether you are meeting their expectations, especially since you can customize the questions for your library.

#### Survey Results

LibQual+™ provides a survey report of results, including color graphs and charts (<http://liblaw.cua.edu/home/libinfo/libqual.pdf>). The report is available in pdf and in hard copy for \$150.00. SurveyMonkey provides a very basic, grey-scale graph of results. You must export the data into another program in order to create color charts. Again, this difference can be a pro or a con. LibQual+™ uses radar charts, which

## DuFour Law Library Survey Web Sites

### LibQual+™

LibQual+™ FAQ

<http://lib.law.cua.edu/home/libinfo/libqualfaq.htm>

LibQual+™ Results

<http://lib.law.cua.edu/home/libinfo/libqual.htm>

LibQual+™ Notebook

<http://lib.law.cua.edu/home/libinfo/libqual.pdf>

### SurveyMonkey

Student Survey FAQ

<http://lib.law.cua.edu/home/libinfo/survey.htm>

Student Survey Raw Data

<http://lib.law.cua.edu/home/libinfo/surveyresults.htm>

Student Survey Full Results

<http://lib.law.cua.edu/home/libinfo/surveyresponse.htm>

Student Survey Report

<http://lib.law.cua.edu/home/libinfo/surveyreport.pdf>

require explanation and are generally confusing to those who are not familiar with them. Although you can create your own Excel charts by exporting the LibQual+™ data, the three-column format makes this difficult (at least it did for this Excel novice). In contrast, you need very little knowledge of Excel to export SurveyMonkey data and to create graphs for each question. We easily created our own survey report with graphs and commentary for each question (<http://lib.law.cua.edu/home/libinfo/surveyreport.pdf>).

### Cost and Support

LibQual+™ costs \$2,850.00 per institution. This cost is for a one-time survey. In contrast, a professional subscription to SurveyMonkey costs \$19.95 per month or \$200.00 per year. This subscription permits an unlimited number of surveys and up to 1,000 responses per month.

LibQual+™ provides a variety of free training programs, a survey manual, and a range of documentation, such as articles and presentations. SurveyMonkey has a searchable “help center” and includes the option of e-mailing questions to technical support. There is room for improvement in this area. A manual which fully explains all features and how to use them would be helpful.

### DuFour Law Library's Experience

We conducted the LibQual+™ survey in 2004 as part of the Association of Jesuit Colleges and Universities Law Libraries. This was the first formal survey we had conducted and it taught us a lot about conducting surveys. I attended a free two-day LibQual+™ training session at ALA that was very useful. Although the survey did assist us in identifying some areas that needed improvement, it was not as helpful as we had hoped. As I mentioned above, some of the questions were too vague or general to be of much use.

In 2006, we used SurveyMonkey to create our own student survey, utilizing what we learned from our experience with LibQual+™. A committee of three staff members (representing Reference, Technical Services, and Access Services) wrote the questions. The survey covered three areas: Library Service, Library Collection and Web Page, and Library Facility and Equipment. The survey contained 25 questions and one open-ended comments box. Most of the questions also contained a com-

**Surveys are powerful tools that can assist libraries in determining how to best meet their students' needs. Considerable time and thought are necessary to make the most of any survey, no matter which type of survey tool you use.**

ments box so that students could explain their responses for each question. The first question asked students to identify themselves as day or evening students. This question enabled us to filter the results so that we could determine whether there is a difference in service on nights and weekends.

Overall, the results of our SurveyMonkey survey were more helpful than the results of LibQual+™. Because we wrote the questions, we were able to better identify specific areas that are important to our students. For example, one of our questions was “Please indicate the areas of legal research with which you would like more assistance.” We expected “legislative histories” to get the highest response, but were surprised to find that “bluebooking” edged out legislative histories by 11%, with a response of 38.6%. Another question that was very informative was “Please indicate which type of research instruction you find most helpful.” We had been considering offering more workshops (outside of those offered in-class), but only 8.7% of respondents indicated that they would like to receive instruction that way.

### Conclusion

Surveys are powerful tools that can assist libraries in determining how to best meet their students' needs. Considerable time and thought are necessary to make the most of any survey, no matter which type of survey tool you use. LibQual+™ users should be prepared to conduct follow-up of some type to determine exactly what type of improvement, if any, is needed. SurveyMonkey users must carefully write their questions and keep in mind the importance of managing their students' expectations. A carefully-conducted survey can provide many benefits, including the appreciation that students feel, knowing that their opinion counts. ■■■

# Questioning Virtual Reference

Jennifer L. McMahan, U.S. Department of Justice

**W**hile reviewing some of the recent literature on virtual reference, I noticed that several authors have questioned the benefits of using the technology in libraries and whether the costs are worth it. (See the *Suggestions for further reading* for some examples of articles written with these views.) It's my feeling that the success and cost-effectiveness of virtual reference services depend on the library and the type and cost of the technology used.

My experience with virtual reference began with a federal librarians' project to provide service to the newly created Department of Homeland Security (DHS), and continues with the virtual reference service my colleagues and I offer at the Department of Justice (DOJ). Each of these experiences has given me some insights into the benefits and challenges associated with providing this type of reference service.

## Ask a Federal Librarian

When the Department of Homeland Security was created, the Department was created in large part by carving out segments from various agencies. Because of this fragmented organizational structure, more than half of the employees were left without library service as many of the libraries from their former agencies remained with those agencies. A committee made up of representatives from 22 federal libraries, including DOJ, was formed and developed the "Ask a Federal Librarian" program for use by DHS employees. Patrons were offered the option of contacting us via online chat several hours a day, or through an e-mail Web form. A list of phone numbers for most of the libraries was also provided. The various libraries involved with the project took turns providing chat service and "triaging" the e-mail account to see if any new questions had been submitted. The collaborative program lasted for a year and then was turned over to DHS.

## DOJ Ask a Librarian

Shortly after the DHS project ended, we at the DOJ libraries started our own "Ask a Librarian" service. Previously, we had a generic e-mail address for patrons to send us questions, but only

a few library staff members could access the e-mail box and there was no good way to share information. So we started using virtual reference software. The "Ask a Librarian" link on our Virtual Library intranet site goes to an e-mail form which patrons can use to submit their questions (we do not offer chat service). I currently serve as our virtual reference "administrator," which means I receive an e-mail when a new question has been asked. Depending upon the nature of the question being asked, I will either answer the e-mail or assign it to an appropriate librarian. In addition to the main Justice Libraries, other DOJ libraries involved in the service include the Bureau of Prisons (BOP), the Drug Enforcement Administration (DEA), the National Criminal Justice Reference Service (NCJRS), and the United States Attorneys Offices (USAO).

## QuestionPoint

On both the DHS and DOJ projects, we chose OCLC's QuestionPoint service (<http://www.questionpoint.org/>). It is a popular choice for federal libraries because it requires no software downloads and the cost is relatively low. It might not have all the bells and whistles of more expensive products, but it does have some basic features common to virtual reference software. These features include the ability to assign questions to other colleagues as well as to refer them to other collaborating libraries, the retention of both chat transcripts and e-mail exchanges so they can be consulted later by both the patron and the librarian, a searchable "Knowledge Base" of questions that can be made accessible to your institution or to all QuestionPoint subscribers, and the ability to search the "Global Knowledge Base" of questions and answers.

## Technology Challenges

The main challenges when instituting a virtual reference service are technology costs and limitations. Virtual reference software can cost more than \$10,000 a year and security issues or other limitations could prevent you from using your preferred software. The pricing and accessibility of QuestionPoint made it an obvious

**The main challenges when instituting a virtual reference service are technology costs and limitations. Virtual reference software can cost more than \$10,000 a year and security issues or other limitations could prevent you from using your preferred software.**

choice for both DHS and DOJ, but it is not without its limitations. While working on the DHS project, I found the chat interface to be slow and somewhat unreliable. Sometimes, the patron would just disappear without explanation. I would try to send the person an e-mail to follow-up, but if the person did not enter in their e-mail address correctly at the start of the chat, they would never receive my e-mail. There is now a newer version of the chat software than the one I used (we do not use the chat feature at DOJ), but it is more technologically advanced than the older version, so it might pose problems with firewalls and other security measures instituted by government agencies.

Even the e-mail-based environment can prove difficult at times. If the patrons do not enter their e-mail addresses correctly, our responses will never reach them, but we will receive no error message telling us that. This drawback requires some diligence on our part, to follow up with the patrons through internal e-mail and make sure they received the help they needed when we get no responses through the system. Keeping track of which librarians are available to answer questions is another challenge. If you send a colleague an internal e-mail, you can see if an out-of-office message comes back. It does not work that way in QuestionPoint. If the software had the ability to inform the administrator of error or out-of-office messages, it would go a long way to making the process more streamlined.

### **How Many Hats Can One Librarian Wear?**

Ask most librarians and they will probably tell you they are already doing more than they can handle, so the idea of adding another duty might seem overwhelming. In many cases, if a virtual reference program is instituted with both the library users and the staff in mind, it can end up making the librarians' jobs easier. However, getting staff to buy into that idea could be problematic. When I was doing chat with the DHS project, we each had hour-long blocks of time that we had to cover, but problems with coverage and scheduling were two of the main complaints mentioned by the librarians who participated in the program.

Some of the librarians at DOJ have found the e-mail virtual reference service to be much less efficient than answering a question in person, on the phone, or via internal e-mail. While

the system does have some limitations, it seems that the more we use it, the less cumbersome it becomes. Due to staffing issues, the number of questions submitted, and the locations of the patrons making requests, some librarians have answered only a few questions since we started the program. The resulting lack of comfort in using the system makes it difficult for them to jump back into using QuestionPoint after not using it for several months. Librarians who use the system more often do not seem to have the same complaints about it.

### **If You Build It, Will They Come?**

Marketing is one of the main challenges of any virtual reference program. Having the best technology and staff is of no benefit if no one knows about it. At DHS, each component, or division, has its own server, e-mail system, and intranet, so it was difficult to get the word out to everyone. It was not until the last month or two of the project that we realized a large portion of DHS did not know about the service because information about it was not added to their intranet page. Once a link was added, we began to see an increase in questions asked, but by then the project was coming to a close.

At DOJ, we have done very little to advertise the "Ask a Librarian" service specifically, other than put it on our Web site and suggest it to people when we teach classes. Nevertheless, we have experienced a fairly steady increase in people using the service. I attribute that to our efforts in advertising our Virtual Library, where the link is prominently displayed. Like DHS, we have a number of different divisions, each with its own intranets and servers. Sending out an e-mail to all of DOJ is not possible. But we try to advertise the Virtual Library at every opportunity, including sending monthly newsletters targeted to specific divisions, broadcasting e-mail messages to those divisions that accept them, conducting ongoing training classes, and making regular appearances on the Justice Television Network (JTN).

### **To Chat or Not to Chat?**

I should mention that there are advantages to using chat as opposed to e-mail, such as the instant response and the fact that it is easier to ask questions back and forth. Another useful feature of chat available in some software programs is co-browsing, which lets the librarian show the

*continued on page 12*

**Ask most librarians and they will probably tell you they are already doing more than they can handle, so the idea of adding another duty might seem overwhelming. In many cases, if a virtual reference program is instituted with both the library users and the staff in mind, it can end up making the librarians' jobs easier.**

Marketing is one of the main challenges of any virtual reference program. Having the best technology and staff is of no benefit if no one knows about it.

## Virtual Reference *continued from page 11*

user on their screen how to get to a certain resource or conduct a search. But just because the technology exists, does not mean you have to use it. While some statewide collaborative virtual reference services are finding a great deal of success with chat, many other libraries are finding that it is not nearly as popular as they hoped. Some libraries that have instituted virtual reference programs abandoned all or part of their services when they realized they were not being used. This is happening more and more with chat service. Libraries are finding that it is not used as much as e-mail, in-person, or phone reference, and when it is used, it is often inefficient. Most of the chat questions I fielded during the DHS project were better answered over e-mail and often they were moved to e-mail before the chat went very far.

### Why Go Virtual?

Given all the costs and challenges of instituting a virtual reference service, what are the benefits? First, virtual reference brings the library to the user. At DOJ, most of the librarians already had relationships with large groups of patrons. These patrons will come to us when they need help. The Ask a Librarian service provides us with a method for reaching those patrons who do not have a librarian at their locations and those who do not know whom to contact.

Even when some patrons know which librarian(s) they can contact for help, they still use QuestionPoint. For some, it is an easy and efficient way to ask a question, especially when working late at night or on weekends. Instead of worrying about sending their question to multiple librarians because they are unsure whom to contact, they just ask their question once and get an answer, usually within a few hours but always within a business day or two. Others may be reticent about asking a question in person or think that sending an e-mail will be more expedient than picking up the phone.

Even if using QuestionPoint can be difficult for some of the librarians, I believe the benefits to the patrons are reason enough to use it and many of them have commented positively about the service. Still, there can be some advantages for the librarians as well. In addition to the networking and collaborative possibilities with a large staff such as ours, it can be an efficient way to get coverage when someone is out of the

office. We have multiple libraries at DOJ and a few of them have only one librarian, so they offer the Ask a Librarian service to their patrons while they are away. Another benefit is the Knowledge Base. While we have yet to take full advantage of this feature, over time I can see it becoming a repository of institutional knowledge. I recently had a request for an updated version of a commonly-used DOJ form. It took several days and at least half a dozen e-mails to find the answer. By putting that information in the Knowledge Base, hopefully it will make the task easier for someone else who needs the same information.

We still do not receive a large ratio of our requests through Ask a Librarian, but there has been a steady increase since we began the service. Many of the submitted questions are from patrons who might not be using the library otherwise. For that reason alone, I feel that the Ask a Librarian option has been more than worthwhile for us.

### Suggestions for further reading:

Lankes, David R. "Digital Reference Research: Fusing Researching and Practice." *Reference & User Services Quarterly* 44, no. 4 (2005): 320-326.

Lupien, Pascal. "Virtual Reference in the Age of Pop-Up Blockers, Firewalls, and Service Pack 2." *Online* (Jul/Aug 2006): 14-19.

Tenopir, Carol. "Online Databases: Rethinking Virtual Reference." *Library Journal* (November 1 2004): 34. [LLL](#)

Karen W. Silber, BNA, Inc.

## Web Search Garage by Tara Calishain

I could have read this book in half the time if I didn't have to stop and try everything. The book has 26 chapters divided into eight parts. Part I (chapters 1-3), Introduction to Web Searching, concentrates on search engines and online tools and gadgets. More on that later.

Part II (chapters 4-13), Principles of Web Searching, contains chapters like The Principle of Unique Language (discussing vocabulary and slang), The Principle of Nicknames (searching for people, places and things), and The Principle of Applied Power (discussing special syntax, or what we know as segment or field searching on LEXIS/Westlaw). As experienced librarians, we are familiar with these techniques and can quickly and easily browse the chapters in Part II. Still, I found this section fun to read because it introduced a few concepts and Web sites I didn't know existed and/or features on those sites I was not aware of (e.g., searching for song lyrics, which, surprisingly, doesn't come up often at BNA).

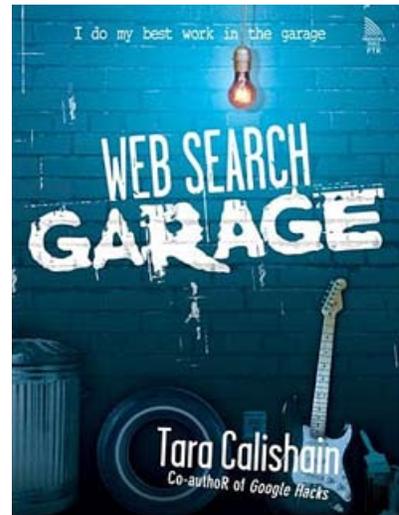
Parts III through VIII are more of an Internet reference directory with each part broken down by specific areas. Part IV, for example, is Searching for Multimedia and contains two chapters: Finding Images and Finding Audio on the Web. Part V, Searching for People, contains a chapter on People Searching and one on Genealogy Research Online. (Calishain notes that "if you're a genealogy researcher, now is a wonderful time to be alive.") Part VI covers Consumer Searching with chapters on Consumer Help, Drugs and Medical Information, and Kid-Safe Searching.

Although these chapters were all interesting, I found Part I most educational. It discussed one of the most basic concepts in internet research: the differences among search engines. Search engines can be divided between full-text engines and searchable subject indexes. Full-text engines try to index the entire content of a Web

page including title, URL, and page content. Google and Teoma are examples of a full-text search engines. Searchable subject indexes do not index the content of a Web site. Instead, the name, URL, and a brief description of the site are included in a set of categories. These categories are browsable and searchable. Yahoo! and Open Directory Project both offer searchable subject indexes.

So why have two kinds of search engines? Full-text engines are good for locating very distinct types of information such as quotes, song lyrics, addresses, lesser-known places, etc., whereas searchable subject indexes are more useful for general searching; for example, finding information on George Washington or New York. Calishain observes that you can find a range of material using a searchable subject index and then narrow your search by getting more specific information from a full-text engine.

Calishain's casual writing, combined with her sense of humor, makes this book an easy read. Wisely, Calishain notes, "don't get into the habit of using just one search engine. Stay out of the rut and keep your eyes open for new engines on which to experiment and hone your searching skills." Too bad Calishain didn't follow her own advice; one thing I didn't like was her heavy reliance on and use of Google in many examples. Aside from that feature, the book was educational and a good reference source. **☆☆☆**



*Amy Taylor, Georgetown University  
Law Library*

**Gloria Miccioli** joined Manatt, Phelps & Phillips as a reference librarian. Gloria was previously at Jones Day.

**Mary Alice Durphy** was sworn in as a CASA Advocate in DC Superior Court. Mary Alice encourages others who are interested to visit [www.casadc.org](http://www.casadc.org).

**Matt Braun** became the Reference/Intellectual Property Librarian at the Jacob Burns Law Library at George Washington University. Matt has been a reference librarian at Burns since August 2005.

**Janet James** became the new Manager of Library Services at Fried, Frank, Harris, Shriver & Jacobson, LLP. Janet previously had been the Manager of Library Services at Baker Botts, LLP.

**Kumar Percy Jayasuriya** joined the Georgetown University Law Library as the new Associate Law Librarian for Patron Services. Kumar was previously the Head of Faculty and Research Services at the Tarlton Law Library, University of Texas.

**Pamela Gregory** of the Maryland Legal Assistance Network attended two workshops on grant writing this summer and assisted in the preparation for an upcoming LSTA grant to train public librarians in the legal resources available from the Maryland People's Law Library. Pamela would be happy to share information on her experience; you can reach her at [pgregory@mdjustice.org](mailto:pgregory@mdjustice.org).

**Anne Ashmore** retired from the U.S. Supreme Court Library after 23 years of superlative research.

**Margaret Milam** retired after 35 years of outstanding and invaluable service as the Associate Director of Collection Development, Pence Law Library, Washington College of Law, American University.

## A Warm Welcome to Our New Members

Pamela Acree – Dickstein Shapiro LLP

Sara Balls – Blank Rome LLP

Leanne Battle – LexisNexis

Alissa Black-Dorward – Baker Botts LLP

Kent Boese – Greenberg Traurig

Scott Bride – Freddie Mac

Deborah Brightwell – InfoCurrent

Patrice Briscoe – Baach Robinson & Lewis

Dottie Byers – Infocurrent

Jeanine Cali – Law Library of Congress

Emily Carr – Law Library of Congress

Donald Coney – Wiley, Rein & Fielding

Megen Cox – Sutherland Asbill  
& Brennan LLP

Susan Crowley – Dickstein Shapiro LLP

Len Davidson – Catholic University  
Law Library

Christopher Davis – Bureau of National Affairs

Jennifer Locke Davitt – Georgetown  
University Law Library

Linda Defendeifer – Hogan & Hartson LLP

Mickey Dice – Info Reference USA

Robert Dickey – Arent Fox PLLC

Marilyn Estes – American University,  
Washington College of Law

Maria Evans – Wilkie Farr & Gallagher LLP

Pamela Gregory – Maryland Legal  
Assistance Network

Dan Hanlon – DLA Piper Rudnick Gray Cary

Nicole Harris – George Washington University

Karen Hinson – Alston & Bird LLP

Mary Hotchkiss – University of  
Washington School of Law

Rebecca Howley – Pepper Hamilton LLP

Kumar Percy Jayasuriya –  
Georgetown University Law Library

Jami Kempf – Wolters Kluwer Legal

Laura Laline-Mowry –  
World Bank Law Library

Yan (Clara) Liao – Georgetown  
University Law Library

Karen Lehmkuhl – Covington & Burling LLP

Lisa MacDonald – Cooley Godward LLP

Jennie Meade – George Washington  
University Law Library

Joe Meringolo – Dickstein Shapiro LLP

Risa Mulligan – Orrick, Herrington & Sutcliffe

Carol Mundorf – Ballard Spahr Andrews  
& Ingersoll

Niketha Owens – Howard University  
Law Library

Lee Passacreta – Oliff & Berridge

Kim Perry – Dickstein Shapiro LLP

Smita Pharke – Georgetown University  
Law Library

Claire Powell – Sutherland Asbill  
& Brennan LLP

Sheryll Rappaport – Ruden McClosky

Kate Rears – Ropes & Gray LLP

Sean Robinson – Williams & Jensen

Jaime Rodriguez – Covington & Burling LLP

Ronnie Schulman – Jones Day

Ann Simpson – Paul Weiss Rifkind  
Wharton & Garison LLP

Tony Sinnott – Wolters Kluwer Law & Business

Ellen Squires – Heller Ehrman LLP

Tim Tameris – Silver, Freedman & Taff, LLP

Julia Taylor – Dickstein Shapiro LLP

James Walther – Greenberg Traurig

Beverly Warren – Caplin & Drysdale

Kristy Yarnell – Holland Knight

Natalie Young – WilmerHale

Kelly Cutler Yuzawa –  
Zuckerman Spaeder LLP

Olesya Zaremba – World Bank

## The LexisNexis Call for Papers Has Begun – You Know You Want to Do It!

Have you been thinking of writing an article of interest to law librarians? Need a push to get started? Well, here it is. The AALL/LexisNexis Call for Papers Committee is soliciting articles in three categories:

**Open Division:** for active and retired AALL members with five or more years of experience;

**New Members Division:** for recent graduates and AALL members who have been in the profession for less than five years; and the

**Student Division:** for students in library, information management or law school. Participants in this division need not be members of AALL.

The winner in each division receives \$750 generously donated by LexisNexis plus the opportunity to present the winning paper at a program during the AALL Annual Meeting, coming up in New Orleans! Winning papers are also considered for publication in the Association's prestigious *Law Library Journal*.

For more information, a list of previous winners and an application, please visit the AALL Web site at [http://www.aallnet.org/about/award\\_call\\_for\\_papers.asp](http://www.aallnet.org/about/award_call_for_papers.asp). Submissions this year must be postmarked by March 1, 2007, so don't waste any time getting started.

If you have any questions, please contact a member of the AALL/LexisNexis Call for Papers Committee: Chair, Renee Rastorfer, [rrastorfer@mac.com](mailto:rrastorfer@mac.com); Ed Greenlee, [egreenle@law.upenn.edu](mailto:egreenle@law.upenn.edu); or Joe Gerken, [gerken@buffalo.edu](mailto:gerken@buffalo.edu). Good luck!

# In Search of the Perfect Library Management System

Mary K. Dzurinko, MK Dzurinko Associates

The Library Management System (LMS), or Integrated Library System (ILS), is an efficient and reliable way to process, index, share, and provide access to information content. The standard system modules on the market today — cataloging, serials, circulation, acquisitions, etc. — offer much the same functionality, but each system has unique features that set it apart from its competitors.

Although no Library Management System is perfect, for every library there is a system out there that is closer to perfect than any other. The challenge is to find that one best system that offers robust functions and features, effectively fits your library's needs, enhances its resources, and delivers information in the format your staff and patrons need.

## Considerations

Whether you purchase a new generation system or upgrade your current system, the basic considerations are the same. In cases where your vendor offers an upgrade or a new product, determine whether it really is a migration to a next-generation LMS or just tweaking of the existing platform.

**Planning.** Conduct a staff review of the LMS now in place to analyze what the system does well and what it lacks. Focus on current and future library needs to determine what a system must provide. For example, are you looking for a more useful and user-friendly OPAC, more flexible serial functions, better control of content, more resource sharing capabilities, a more sophisticated circulation system, or stronger electronic resources management?

What type of LMS do you need? Do you need a system that is installed on a local server and maintained by the library and/or your institution's IT department? Do you need a system that is installed and maintained by the vendor on its site server (ASP)? Do you need a system that al-

lows a large degree of local customization? Do you need a Web-based system? Are you interested in an innovative Open Source system such as Koha (<http://www.kokha.org/>)? Do you need a system that works right “out of the box?” Do you need an SQL product? Do you need Web and electronic resources linkage capabilities? Armed with the answers to these questions, create an LMS project plan that includes a timeline, budget projections, implementation and installation plans, and system/vendor evaluation criteria.

Speak with colleagues to learn why they purchased their systems. Be cautious of the answer, “It's like the Internet.” I really don't know what that means — Does it look like the Internet? Does it search like the Internet? Is it as easy to use as the Internet is? Does it use Internet-like technology? Ask about the special issues that arose during system implementation, especially in regard to data conversion, vendor support, and training.

**Cost.** What can you afford? Purchase price is a one time expenditure. However, annual costs include license fees, system maintenance and upkeep, training, physical facilities, database conversion and storage, information delivery, documentation, and user groups and conference fees. Some vendors offer multi-year contracts that cover annual support, allowing a library to lock in these costs as a budget line item. Confirm what products are included with the purchase price. For example, electronic resources management, content management, and URL link checking may be available, but for an added cost.

**Staff.** Staff resources are a critical factor in successful implementation. During the LMS project, routine staff duties continue; adding LMS responsibilities creates staff stress and may limit the delivery of patron services. Investigate the use of temporary personnel. A wise move is to assign a project manager, either an experienced

The challenge is to find that one best system that offers robust functions and features, effectively fits your library's needs, enhances its resources, and delivers information in the format your staff and patrons need.

staff member or a new hire, to work with both the staff and the vendor. You might also consider hiring a consultant.

**Vendors.** It's difficult to get a good grip on the current vendor situation. In the last few years, vendors have gone out of business, consolidated their products, merged with competitors or non-library related investment and software companies, and introduced completely new products. I can't predict the future, but it's a good bet that there are more changes on the horizon.

Investigate the vendor as you would any business. Look at its reputation, officers, financial assets, support staff, R&D commitments, and number of clients. Take advantage of vendor demonstrations at professional meetings and invite selected vendors to your library for on-site product demonstrations. A wide range of LMS review/news publications and Web sites are available, including the ALA LITA technology reviews, Library Technology Guides (<http://www.librarytechnology.org/>), Biblio Tech Review ([http://www.ringgold.com/biblio-tech/si\\_pd.cfm?Pid=1](http://www.ringgold.com/biblio-tech/si_pd.cfm?Pid=1)), and Survey of Library Automation in Use at Various Libraries (<http://units.sla.org/division/dsol/resources/autosurv.htm>). Many state libraries (e.g., Colorado, Maine, and Indiana) maintain library technology Web sites. Integrated Library System Reports (<http://www.ilsr.com/tech.htm>) may be useful, although it's not up-to-date.

**RFP/RFI.** I have some reservations about the RFP (Request for Proposal). On the one hand, it gives a vendor an in-depth outline of your LMS needs and helps you compare systems' features. On the other hand, since standard features (cataloging, serials, circulation, etc.) vary little between systems and vendor competition is fierce, your most important needs may be overlooked. In order to avoid confusion, make certain that your RFP clearly specifies specialized local requirements, and ask vendors for written responses.

Some libraries use the RFI (Request for Information) as an alternative. An information gathering tool, the RFI contains background information on the library's LMS requirements and invites vendors to submit product, cost, and other pertinent data that can assist with LMS evaluation.

**Data Conversion.** It seems easy — take the records from one system and load them into another system. Unfortunately, although MARC format is a standard, not all systems store MARC records in the same way and not all libraries use MARC as their cataloging format. If your records are not in full MARC; that is, if only selected fields are stored, bibliographic, and possibly holdings and authority, data will not migrate properly. In these cases, and when records are in text format, be ready to work with the vendor to tag the data to load properly into your new LMS. To discover conversion problems or to see what your converted data looks like, ask vendors to create a beta database containing some of your records. Usually, I recommend using a third party data conversion vendor for data conversions.

**Serials.** Second- and third-generation LMS serial modules handle all types of serial title formats and holdings information, and provide real-time check-in update links to the OPAC. As first-generation systems did not store much of this type of information, you may face serial migration problems. It often takes more time and effort to clean up migrated serial data than to create new serial records. Depending on the size of your holdings, the creation of a new serials database may be a more feasible option than the migration of your current database.

## Conclusion

LMS evaluation, purchase, installation, and implementation is time and labor intensive. The project's many facets — product investigation, costs, staff resources, vendor negotiations, and data conversion, etc. — demand careful attention and review. As you move forward, remember that there is a system that best fulfills your requirements and that you and your staff are up to the challenge to find it. **!!!**

**LMS evaluation, purchase, installation, and implementation is time and labor intensive. The project's many facets — product investigation, costs, staff resources, vendor negotiations, and data conversion, etc. — demand careful attention and review.**

# Law Firm Librarians and Enterprise Resource Planning (ERP)

Donald D. Coney, Jr., Wiley, Rein & Fielding LLP

Many organizations have implemented ERP solutions in an attempt to integrate their “back-end” operations. In industries such as heavy manufacturing (auto, airplane, etc.), an ERP-enabled company is more the norm than the exception. Typically, these solutions are used to facilitate back-end functions like accounting, inventory, materials management, and other functions traditionally associated with manufacturing, production, and distribution tasks. Only relatively recently have ERP vendors begun to enter the professional services industries and, in particular, the law firm marketplace.

Recent discussion has addressed the merits and problems involved with implementing ERP in law firms. Two articles in particular illustrate this divide. Matthew Horenkamp, a Principal with SAP, wrote in the September 2005 *American Lawyer* about the flexibility an ERP solution can bring a law firm.<sup>(1)</sup> In contrast, John Alber, a technology partner at Bryan Cave LLP, argues that the expense and complexity of ERP implementations far outweigh the potential benefits an ERP solution could provide a law firm.<sup>(2)</sup> Several large law firms on both sides of the Atlantic, including Howrey LLP, Clifford Chance, and Linklaters, are implementing or already have implemented ERP packages. Whatever the debate, it looks like law firm ERP implementation is a trend that is likely to grow.

This article intends to provide a general overview of ERP within a law firm and to outline ways that law librarians and other information professionals can be involved should your firm decide to go the ERP route.

## What is ERP?

Enterprise Resource Planning (ERP) is a catch-all phrase for software architectures and organizational structures that integrate processes and data across an entire enterprise. Developed and sold by companies such as SAP, Oracle, and Baan, ERP software solutions are standardized “off the shelf” packages intended to provide a

platform under which all administrative and back-end functions can be integrated.

ERP consultants and software companies will tell you that the integration and transparency afforded to an organization with an ERP solution are essential to compete in today’s fast-moving business environment. Elimination of departmental islands of automation can do nothing but improve an organization’s bottom line.

In contrast, employees of an organization about to implement an ERP solution often see ERP as an enormous, highly complex, and expensive software suite. While these packages are supposed to provide an organization with an unbeatable competitive advantage, they are also seen by many end users as cumbersome systems that only get in the way of completing daily activities. Often requiring the long-term services of equally expensive consultants, many end users consider ERP not as an opportunity but an annoyance or obstacle to be overcome.

As is often the case, the truth lies somewhere between these two extremes.

ERP packages are indeed large, costly to implement, chock full of change-management challenges, and expensive to operate. Nevertheless, in many cases, the back-end integration provided by a successful — the key word here being successful — ERP implementation has streamlined operations and, in the long term, provided increased efficiencies throughout an enterprise and across departments. However, since these packages are intended to fully integrate an enterprise’s IT functionality and business processes, ERP involves much more than merely implementing a new IT architecture. Nowhere are the change-management and process-reengineering challenges presented by ERP more prominent than in law firms.

Traditionally, IT applications have been purchased for and deployed within specific departments. This specificity has led to the creation of departmental IT “silos” where data exists and is managed within each department’s legacy

Many organizations have implemented ERP solutions in an attempt to integrate their “backend” operations. Only relatively recently have ERP vendors begun to enter the professional services industries and, in particular, the law firm marketplace.

systems. These silos lead to departmental “islands of automation” where few if any employees outside of a specific department know how to effectively use an application or even retrieve information from those applications. Sharing of that information beyond departmental boundaries is often controlled by each department’s “gatekeepers.”

In this compartmentalized environment, there is little or no real integration of IT applications. It is more accurate to say that applications interoperate via the use of some kind of middleware. Intranets and portals may provide the appearance of an integrated package of applications, but behind the scenes, these disparate applications are only “talking” because of an intervening middleware client. Problems arise in that separate instances of data can and often are housed within separate department-based legacy applications. Exchanges between these systems are often complicated affairs. A very simple example of such an exchange would be:

1. HR extracting salary information from an application
2. Putting that data into an Excel spreadsheet
3. E-mailing the file to the Accounting Department
4. Which then uploads (or sometimes keys in) the data into its own application

Law firms are no different from, and indeed may provide more extreme examples of, siloing than most other industries. While enterprise-wide integration has swept through large traditional business organizations, most law firms still operate within the departmental silo paradigm.

In an ERP package, processes are much more important than departmental functions. The ultimate object of any ERP implementation is to eliminate departmental silos as much as possible and to integrate IT along process lines.

This is not to say that ERP eliminates departments. Obviously, there is a need for administrative departments such as accounting and human resources. ERP packages have numerous modules that correlate to specific functions. Consequently, while data is maintained inside a common database, individual departments have modules specifically tailored to their roles inside the organization.

As a discipline, ERP is about more than just IT. At the heart of ERP are process integration and the transparency of processes and data. Instead of data being housed exclusively in one department or as multiple instances inside two or more legacy systems, an ERP solution allows data to become available across the entire enterprise. With an ERP solution, accounting, HR, and billing information don’t need to be extracted from an array of disparate and often dissimilar applications. Instead, the data lies within a common database and is accessible from a common organization-wide application.

### **Why Would a Law Firm Want to Go the ERP Route?**

There are numerous reasons a law firm would consider implementing ERP. Below is a brief discussion of some of the major factors supporting the use of an ERP system.

#### **Consolidation**

By examining just a single year, one can quickly see the changes taking place in the law firm market. In 2003, for example, 60 law firms merged or acquired rival firms. Twenty U.S. firms opened new foreign offices and thirteen “old name” U.S. firms dissolved.<sup>(3)</sup> Consolidation creates IT challenges beyond the integration of two organizations’ architectures. These are issues that can be addressed by an ERP package.

#### **Economies of Scale**

As firms get bigger and open more offices in more locations, ERP can be used to provide a common platform that is standardized across the entire organization. This standardization provides a firm with the ability to consolidate its administrative functions and gain the efficiencies of large scale processing.

#### **Changing Nature of Legal Representation**

More and more, the legal field is being treated by clients as just another professional service. Clients are increasingly asking for (and receiving) flat rate contracts from law firms. While the billable hour has not disappeared, it is in decline. Additionally, firms are having to meet their client’s reporting requirements, many of

*continued on page 20*

**Enterprise Resource Planning (ERP) is a catch-all phrase for software architectures and organizational structures that integrate processes and data across an entire enterprise.**

**As firm-wide stewards of information and traditional drivers of IT innovation and deployment, librarians occupy especially valuable pieces of organizational real estate in any effort to bring about the changes required to make an ERP implementation successful.**

## **ERP** *continued from page 19*

which simply are not supported by older legacy systems. Lastly, as a firm's clients grow in their IT sophistication, law firms will need to keep up, if only so they can effectively bill those clients. ERP solutions can produce detailed reports and billing statements for clients and provide an integration with a client's applications that may not be achievable with often outdated legacy systems.

With clients increasingly demanding flat-rate or fixed-price contracts from their legal counsel, firms will be increasingly called to reduce their administrative overhead. ERP solutions are designed to facilitate the transport of mission-critical data across an organization. This entity-wide transparency in turn is designed to increase individuals' efficiency; they can spend less time tracking down information and thus become more profitable to the organization as a whole.

### **What Can Law Librarians Bring to the ERP Table?**

A firm's decision to implement an ERP solution will most likely be made by management outside of the library. In addition, any ERP implementation will, out of necessity, require the services of outside consultants. However, once the decision is made to go the ERP route, law librarians can and should provide input in the project management process. There are numerous reasons for this involvement:

- Libraries have traditionally been technology drivers in law firms. From the earliest iterations of WESTLAW and LEXIS, law librarians have been on the front lines of the IT battle and have to be both IT savvy and extremely flexible.
- Ironically, libraries will one of the departments whose applications will be the most immune to ERP integration. Many of the mainstays of law libraries such as WESTLAW, LEXIS and OCLC are external applications and won't be part of an ERP package. Furthermore, no ERP application that I know of currently has a library or bibliographic database module. As such, a library's Integrated Library System is one of the

few administrative applications that will need to be retained.

Because most of the library's applications will be relatively untouched by an ERP implementation, librarians are better equipped than other administrative departments to objectively evaluate the changes required by ERP. As such, librarians could be seen as facilitators or arbiters during the implementation process. In other words, since the firm's librarian doesn't have to "defend" as much IT turf as, say, the head of accounting, she can be used to help "smooth" things between department managers and ERP consultants.

- Librarians by their very nature deal in transparency. While appropriate restrictions to data access will be need to be established throughout a firm, librarians are comfortable making information available to internal and external clients. Just as many firms' knowledge management efforts have allowed librarians to shine, so too will an ERP implementation provide opportunities for librarians to showcase their aptitude for change and data management.
- Integrated Library Systems (ILS) have long been a staple of back-end acquisitions and technical services. While not nearly as complex as an ERP package such as SAP or Oracle/Peoplesoft, an argument can be made that an ILS is an ERP package in miniature. The architecture of an ILS closely mimics an ERP module-based framework. As a result, law firm librarians are able to bring at least a rudimentary understanding of integrated systems to the planning table and should be seen by firm management as a resource on the subject of transparent and truly integrated systems.
- Having dealt with the research needs of attorneys firm-wide and worked with administrative departments all across a firm's organization, librarians also bring a wealth of institutional knowledge to ERP planning. Since a major component of any ERP implementation involves consultants attempting to understand and "tweak" a firm's

processes, librarians can be used to provide a unique and objective perspective to departmental procedures and processes from both an end user's and a participant's perspective.

Law librarians have unique opportunities if their organization should decide to implement an ERP solution. For the reasons stated above, librarians can and should be involved from the earliest stages in any ERP effort.

### Conclusions

If a law firm decides to invest the time, money, and effort to implement an ERP solution, every department and practice area will be affected. While most analyses of ERP are IT-focused, a successful implementation brings with it significant organizational, business process, and change management challenges. Typically, ERP solutions and their imbedded business rules are so complex that it is easier to reengineer an organization's processes to the solution's imbedded logic than to customize that logic to an organization's legacy processes and procedures. In many ways, the management of change and business process reengineering is more important than the actual implementation and deployment of the IT component of an ERP solution.

Here is where law firm librarians can contribute the most should their firm decide to go the ERP route. Their intimate knowledge of a firm's administrative processes and practice area information requirements and functionality make law firm librarians uniquely qualified to assist in the changes required for a successful

ERP rollout. Law librarians also have a cache of respectability and attention to detail they can bring to any extensive IT project, especially one as complicated as an ERP rollout. Even in the most progressive firms, information transparency is not the stock and trade of most lawyers, while for their firm librarians transparency is their stock and trade.

It is very likely that during an ERP implementation, a firm's librarians will be at best taken for granted and at worst be ignored. Yet as firm-wide stewards of information and traditional drivers of IT innovation and deployment, librarians occupy especially valuable pieces of organizational real estate in any effort to bring about the changes required to make an ERP implementation successful.

### References

- (1) Matthew J. Horenkamp, "Resolving the Tension between the Business of Law and the Profession: Achieving Law-Firm 'Synthesis,'" Special Advertising Section in *American Lawyer* (September 2005).
- (2) John Alber, "ERPs or data warehouses for law firms?" *LLRX.com* (November 20, 2005), <http://www.llrx.com/features/erp.htm>
- (3) Nathan Bowie, *Financial System Technology Landscape* (PowerPoint presentation to Baker, Robbins & Co., Chicago, IL, October 26, 2004, slide 10). 

# WilliamsWeb — Georgetown Law Library's Intranet

*Craig Lelansky, Georgetown Law Library*

Georgetown University Law Library has a fairly large staff of twenty librarians and forty technicians in two locations at Georgetown's Law Center Campus. In every way, the library staff is more connected to the online or networked environment than ever. We all want to have the information that we rely on available as conveniently as possible. One way our library staff attempts to accomplish this goal is by using a library intranet.

Intranets have been around for several years. In essence, an intranet is a network within an organization that usually resides behind a fire wall and often is password protected. It uses Internet technologies to enable users to find, use, and share work related documents and Web pages and to learn about company news. Here at Georgetown, our library's intranet is called WilliamsWeb after the Edward Bennett Williams (EBW) Law Library. The library staff envisioned, defined, and created WilliamsWeb a little more than three years ago.

## The Basics

The library established a new department, the Electronic Resource Section (ERS) about four years ago. The idea has always been that the ERS staff would maintain and develop electronic products and resources for the library. One of its first tasks was to establish an intranet for the library, and then assist other staff members in creating and loading new content onto the Web site. Much of the actual content was left up to the departments that had expressed interest in, or had ownership of, the information needed. The departments were also charged with updating and maintaining their particular areas within the site.

One of the key features was that the pages on the WilliamsWeb intranet would be uniform in format and style and, at the same time, be uniquely different from other university and World Wide Web pages. One of the first steps in creating our intranet was to develop a series of templates and style sheets that would be used for

the different site level pages. Next, ERS created guides and other resources that staff would use to maintain and develop the site. We use Contribute as the Web authoring tool and much of our content resides in databases and appears on Web pages through Cold Fusion programming. One of the main advantages of using databases is to allow the library staff to update and replace information in one place and have it accessed via any number of access points.

The main page of our intranet site contains essentially a home page for the intranet. It was designed as one stop shopping for all your library information needs. The homepage has five main sections.

- **Community Links** (includes Georgetown University's related links, HR resources and links to the Law Centers resources)
- **News Link** (includes what's happening in the University, news about the University, Law Center, and the Library)
- **Web Tools** (includes a calendar, a "how do I" FAQ for technology, the EBW guide to adding content on WilliamsWeb, and design templates)
- **Library Documents** (includes mission statement, strategic plan, annual goals, and a values statement)
- **Links to Sections** (our library departments, forums, groups and resources)

The Sections part of the intranet is the most extensive library-staff-produced part of the site. It is structured essentially around an organizational chart of the library it serves. This structure had several advantages in the initial establishment of the site. It was an easy way to set up a structure that all employees were already familiar with. It gave each department a logical "place" on the new intranet where they could

An intranet is a network within an organization that usually resides behind a firewall and often is password protected. It uses Internet technologies to enable users to find, use, and share work related documents and Web pages and to learn about company news.

add and utilize contents in an area they were already familiar with. It was designed not only to give personnel assigned to the department a place to go for resources needed, but also a place where staff outside a department could go to learn about a process or procedure in all sections of the library. The design was an attempt to allow library-wide access to the information that was previously held just in the department. With this information available on WilliamsWeb, staff would have the resources available at their desktop to learn more about the potentially complex processes from other sections, thereby becoming a more informed participant in the process.

Within each section, the layout and the information is presented in a standard, uniform fashion. Each section contains the following: a welcome message explaining the nature and function of the section, other section unit information or resources, and all contain a staff contact pages, forms, a “how do I?” FAQ, policies, projects, resources, services, and what’s new in the section. The theory was that if the information was presented in a set pattern then it would be easier to navigate and know what type information could be obtained using any of the departmental sites. While the advantages are evident, the results have been somewhat uneven.

An easy compare-and-contrast example of how we are using the intranet is found in looking at the pages from the Administrative Services and the Collection Services sections. Administrative Services has made great use of the site. Their section contains up-to-date information for other departments to use. Especially useful is supervisory staff information that contains evaluation forms, new hire information, and the ever popular request for leave form. Another area provides information for new staff orientation, containing resources for both new employees and supervisors alike. The “Orientation Roadmap” is a guide for the new employee that contains several useful resources including the basics of working at Georgetown, description of benefits, how to get your phone and e-mail services connected, where to get ID cards, as well as general information about the library, law center, and the university. The “Orientation Checklist” contains information the supervisors should use to ensure that they complete all appropriate steps in the new staff orientation process.

This excellent use of the intranet is in contrast to my home section, Collection Services (formerly called Technical Services), which after the initial information gathering and participation phase has not been a heavy contributor of new content, or encouraged active use of the site. It is not that our procedures and processes have not been updated, but these have not been actively added to the intranet for use of staff members outside the section.

### **Push and Pull**

Some members of our staff tend to push the information posted on our intranet using an e-mail that includes a link to the information on WilliamsWeb. This information “push” is a two pronged process. First, the intranet site is updated to keep information current, and second, the new information is distributed and made available on the staff’s desktop. One of the prime examples of the “push” process is the monthly reference schedule. An e-mail is sent indicating that the reference schedule is now available for the current month. It is sent initially as a draft schedule then after editing as the final schedule. Staff then uses the link to connect directly to the page the schedule resides on. This is a very effective use of the site — as reflected by the fact that for the last six months it is the most viewed site on our intranet. The site also contains several years of reference desk schedules to serve as an historical perspective.

Like all products, the usefulness of our intranet is often a direct result of the content entered and the timeliness of the updates. This usefulness is especially evident in the section on Forums and Committees. Some have extensive content for past and future events; others are not so heavily used. The standard template for each forum or committee includes the charge of the committee or forum, the schedule of upcoming meetings, meeting agendas, minutes of past meetings, and any documents or projects that the forum is involved in. The Human Resources Forum in particular has kept the site up-to-date and has a wealth of information available. Again they push the intranet as a tool by using e-mail and a link to the site where one can find the agenda and information about the Forums future and past endeavors.

*continued on page 24*

**In every way, the library staff is more connected to the online or networked environment than ever. We all want to have the information that we rely on available as conveniently as possible. One way our library staff attempts this goal is by using a library intranet.**

An example of having to “pull” information is the “Master Calendar.” This is a main campus application that our intranet provides a link to. Seems like a wonderful idea — one place for all your meetings events at the law center or library and a place to consult before scheduling your next meeting. The only problem is that the calendar is really hard to use. Two selections down from the calendar is a section on “how to use the calendar;” the instructions are two full screens of instructions. As might be predicted, most of the staff rely instead on the old paper version of our two conference rooms’ schedules and then contact the staff directly to schedule meetings.

### **Where are We and Where Do We Go?**

As is detailed above, we have a rather complete intranet and one that has some strong points and some areas where there is room for im-

provement. Our site has been up and running for about three years. Much of the literature indicates that three years is about the time frame when an institution should be looking at a major review of its intranet, as an intranet should never really be static or, frankly, complete. Fortunately, there are countless resources on how to evaluate and improve your site. Most of these focus on usability evaluations, stakeholder interviews, and reviewing and analyzing existing data. This top-to-bottom evaluation is probably where we should start to determine what’s needed, what’s working, and how we can fix what does not work. The staff needs to take ownership of sections and have at least a majority buy into this endeavor as a worthwhile project that should be supported. We also need to fully understand that the review process is often as complicated and time consuming as was the initial process for launching the site, and plan accordingly. **LLL**

## **Share your professional knowledge and energy! Use your leadership abilities! Enjoy the thrill of Victory!**

Most candidates for LLSDC office are motivated by the first two reasons for running, but if you are the best candidate for a position, you should also be able to enjoy your victory and the chance to serve your colleagues and our profession. The LLSDC Nominations Committee is currently seeking qualified, motivated members to run for several offices for the 2007 elections. If you would like to take your association activity to the next level, or if you know someone else who would be a good leader for LLSDC, contact Martha Klein at **[mklein@mckennalong.com](mailto:mklein@mckennalong.com)** or at 202/496-7844.

Roger V. Skalbeck, George Mason School of Law

## Some Miscellaneous Thoughts on Today's Technology

### Examining Searches: Google's Zeitgeist and Trends

Many of you probably saw the headlines reporting AOL's release of search logs from 657,000 users. AOL assigned a random number to each log as a way to keep user identities anonymous. As it turns out, the effort failed. One illustration: the *New York Times* was able to track the searches of user #4417749 back to a 62-year-old widow in Georgia.

According to a FAQ on the Wired website about AOL's debacle (<http://snipurl.com/w97w>), the research division of AOL released this information for academic search researchers. It looks like the data was meant to help search engine designers to understand user search trends and strategies. The Wired article "FAQ: AOL's Search Gaffe and You" provides useful information for understanding what happened with the AOL problem, together with tips on how to manage cookies and limit exposure of information you want kept private.

To see examples of better user privacy protection, check out two services provided by Google: Zeitgeist and Trends. I'm admittedly wary of promoting every nuanced feature of Google for fear that searchers may some day use it to the exclusion of everything else on the Internet. Also, not everything from Google is worth writing home about. Nonetheless, Google has become the de facto search engine for millions of Internet users, and so warrants examination.

The first feature, Zeitgeist, lets you view a report of the "spirit of the times" with search queries on Google. At [www.google.com/zeitgeist](http://www.google.com/zeitgeist), it provides a historical view of the top searches on Google in the United States and around the world. In the week ending September 4, 2006, Steve Irwin was at the top, with John

Mayer ranking at number 11. Probably the latter is the musician and not the director of the Center for Computer-Assisted Legal Instruction (CALI), but the results can't differentiate between the two in this list.

A more interesting feature is Google Trends ([www.google.com/trends](http://www.google.com/trends)), which allows you to search for up to five separate terms and rank them based on historical search popularity and news references. You can search by month, year, or country, and results display top cities and regions. This analysis tool is different from the AOL search logs in that they approximate results, limit the display to aggregated data, and base the output on only a portion of the searches on their service. Try it to see, for instance, whether more people are searching for the term "Lexis" or "Westlaw." Unsurprisingly, the top city searching for Lexis is Dayton, Ohio. For a non-legal list of trend topics, look at "25 Things I Learned on Google Trends" (from a public relations blog: <http://snipurl.com/w93n>).

A final item on the topic of Google: note that the term is now officially a verb. Well, at least it has appeared in two dictionaries. Check out a brief editorial in the September 2006 issue of *Information Today* to see analysis of the introduction of the verb "google" in *Merriam-Webster's Collegiate Dictionary* and the *Oxford English Dictionary*. The author argues that Google should break the traditional rules of good trademark practice by letting the name become generic.

### Two Things I Don't Understand

In writing this column, I like to highlight important and useful information. Because not everything new is actually useful, I want to

*continued on page 26*

mention two of my recent finds that I can't see anyone finding helpful.

First off, a new computer keyboard recently caught my attention because of its color scheme and compact size. It is a \$70 keyboard from a company called New Standard Keyboards. It has 53 keys instead of the current standard of 101. Of course, the so-called "101 key" keyboard itself often has between 104-130+ keys. At first blush, the 53-key version seems like a great idea. The device is very small, there are fewer keys to learn, and one model comes with color-coded keys for quick visual recognition. The problem is that the keys are listed in alphabetical order (not QWERTY), the spacebar is the same size as every other key, and most keys have five characters on each surface. Surprisingly, I didn't find this product listed on some obscure Internet keyboard blog. Instead, it appeared in *Law Technology News*. Possibly this device is meant for very old partners who never learned how to type? For the vendor's perspective of its product, go to: [www.newstandardkeyboards.com](http://www.newstandardkeyboards.com).

Something else I can't imagine any respectable lawyer using is a legal research company with glaring grammatical errors on its Web site. Certainly, research can be outsourced, such as with specialized research and "out of the ordinary" requests. However, this service wants lawyers to outsource general searching to a company in India. Beyond the grammatical errors on the site, the company provides its request form through an unsecured Web-based form, encouraging a lawyer to submit a request before even talking to somebody about possible conflicts or discussing pricing. To make your own assessment of their services, go to: [www.economicalservices.com](http://www.economicalservices.com).

## **Learning in Unexpected Places**

It has been long understood that "War teaches national geography." After all, how did most Americans first hear of the city of Najaf? For our modern times, I add to this two new lessons of life:

- #1: "Radio traffic reports teach local geography." If you live in the D.C. area, how did you first hear about Occoquan, Germantown, or Kenilworth Avenue?
- #2: "Spam teaches us about trendy new pharmaceuticals." Maybe I don't get out enough, but my junk mail folder is where I first heard about Cialis, Hoodia and soft tabs. As an interesting aside, early spam filters apparently would reject mail with the word "specialist" because it contained "cialis."

## **Spam that Requires Lots of Effort to be Duped**

Also on the topic of spam, there's an interesting new type of spam that seems to be sneaking through many filters. A typical message consists of a single GIF or JPEG image followed by random text. The image usually describes a prospectus of stock from an 'undervalued' company with a URL depicted in the image. On most of these e-mails, the link isn't active so a user has to copy a Web URL by hand (it isn't text, so you do this manually), switch to a Web browser, type it in, and then decide to buy stock in the company. Some messages include only a stock name and price (usually valued in pennies). If anybody is truly duped by spam requiring so much individual effort, there's really no defense that you "just clicked on the wrong link." **LLL**

Susan Chinoransky, *The George Washington University Law Library*

## Serials Records — Dates in the Record

A source of some confusion in the serial record arises from the display of dates in the catalog. These dates may emanate from several places in the physical item and are recorded in more than one MARC field. The most important date field for the patron is the 362 field; it contains the numeric, alphabetic, and/or chronological designation for the first issue of the serial and, if publication ceased, the last.

Unfortunately, WebPacs do not generally display the 362 field. Often, the 260 field is displayed instead, particularly in the browse screen. The 260 field contains the date of publication, release date, or copyright date. For monographs, the field helps distinguish among different editions of the same title. Recording the 260 field in serials is a little trickier. In order for the date to be recorded, the cataloger must have the first and/or last physical piece in hand; otherwise no date may be recorded. This requirement explains why some serial records have dates, and others do not. In the case of *Brigham Young University Law Review*, the 362 field states that the title began in 1975, yet there is no date in the 260 field. This omission indicates that the cataloger did not have the issue for 1975 in hand, although there was evidence elsewhere regarding the date that the title began.

Occasionally, serial records display dates in the 260 field that are inconsistent with the actual chronological dates of the work. For example, the *George Washington Law Review* began with volume 1, no. 1 in November 1932. Yet the date on the browse screen is c1933; obviously a copyright date. In this case, the 260 field may present the patron with inaccurate and confusing information.

So how does one get to the 362 field? Most WebPacs have a “MARC Display” button. When clicked, the metadata-rich MARC record is revealed, along with many other fields that are

typically hidden from the patron’s view. If the patron and MARC displays are scrutinized side by side, one can begin to discern some of the information gems hidden from the patron.

### New Periodical Titles

*European Constitutional Law Review*, 2005-  
Three times a year, T.M.C. Asser Press

*Journal of Food Law & Policy*, 2005-  
Semiannual, University of Arkansas  
School of Law

*Journal of Intellectual Property Law  
& Practice*, 2006-  
Monthly, Oxford University Press

### Title Changes

*aalsnews*, 2005-  
*Quarterly, Association of American Law Schools*  
Continues: *Newsletter (Association of American  
Law Schools)*

*Cardozo Journal of Law & Gender*, 2005-  
Three times in the academic year,  
Benjamin N. Cardozo School of Law,  
Yeshiva University  
Continues: *Cardozo Women’s Law Journal*

*Competition and Regulation in  
Network Industries*, 2006-  
Four no. a year, Intersentia  
Continues: *Journal of Network Industries*

*Southern California Review of Law  
and Social Justice*, 2006-  
Semiannual, University of Southern  
California, Gould School of Law  
Continues: *Southern California Review  
of Law and Women’s Studies* 

The current pace of change in legal research, made possible by technological advances, means that law librarians constantly have to learn new techniques and tools just to stay current. This is the lifetime learning that was discussed in library school.

# The Pace of Change in Legal Literature

*Billie J. Grey, Board of Veterans Appeals*

When I attended library school, lifetime learning was strongly emphasized. Library school students were encouraged to both be lifetime learners and to facilitate others being lifetime learners. For law librarians today, that mantra is not just an aspiration, it is a necessity. Willingness to learn new resources was not always a necessity for law librarians, however.

Anyone who learned legal research in the early 1970s relied upon many of the same tools that had been in use since the late 1800s. The tools of legal research developed slowly from 1481 or 1482 when Littleton's *Tenures* was published. The original Littleton's *Tenures* was not a treatise, lacking footnotes and case citations. It was a teaching tool and was printed with large margins so that the student could annotate it. The 1581 edition of Littleton's had a revolutionary development — section numbers. Section citations could be used with any edition of the book, not just a page citation to the particular edition being used by the author.

During the 16th century, law books began to include citations to decisions. Case reporting had to be reliable for there to be citations and footnotes. Spencer's Case, which is still cited concerning the responsibilities of tenants, was decided in 1583 but not reported until 1605; however, by 1785, King's Bench decisions were published as they were issued.

Prior to Shepard's citation indexing, handwritten notes in law books provided the best way to track the developments on a point of law. A statute book would be annotated with the citation of any later statute that affected the same point of law and related cases. Similarly for a reported decision, the handwritten notes tracked citations to the case and its continuing validity.

Three final enhancements to the available print resources were put into place in the later 19th and early 20th centuries when (1) the West Publishing Company began routinely publishing court decisions for many jurisdictions, then (2) created a headnote system organizing case topics into fields of law, and (3) Shepard's began publishing citation indexes for legal materials.

Up until the late 1960s, that idea of commitment to lifetime learning from library school didn't seem to apply to legal research. The traditional tools and techniques of legal research were

learned and ready to be applied over a career. Then technological developments intervened and the pace of change quickened.

In the 1970s, Mead Data Central introduced full-text searching of Ohio and New York decisions, SEC no-action letters, and tax materials. The basic training was conducted over a period of three days. The entire first day was spent on concordance and Boolean searching. Soon West offered their headnotes in searchable electronic format. The race continues to this day. Law librarians who once mastered command stacking to minimize online time have now progressed to flat rate contracts and graphical interfaces.

In legal research courses in the late 1980s, students were required to complete one project using computer assisted legal research. In the late 1990s, students had to be required to complete one project using traditional (book) research. Creating a legal research problem that can most easily be researched in the books is not particularly difficult. Usually those problems are statutory or regulatory research.

Sometimes the electronic trick of the trade is disappointingly easy compared to the old process. Cite-checking a table of authorities, now involving just a few keystrokes, was traditionally a time-consuming paralegal responsibility. Basically, reviewing the table of authorities involved reviewing all documents cited to determine whether the authorities cited within those documents were still good law. When that task was done, there was the opponent's filing to review using the same technique.

Computer-assisted legal research databases have been adding depth and the Web enables hotlinks. HeinOnline offers extensive databases of older materials, which the larger vendors had not provided. Hotlinks to court decisions work beautifully, taking the user directly to the cited language but with access to the entire decision. Hotlinks to statutes and regulations are sometimes of questionable use since they always connect to the current version, even if the cite is to a superceded version. This is the worst sort of false friend. The researcher will waste valuable time before realizing that the hotlinked version is not the version being interpreted.

Just as some materials are described as "born digital," there are now legal research tools which originated electronically. IndexMaster assists in identifying the best treatise for a

certain research project. The traditional research technique which most closely approximates an IndexMaster search was to review a buffet of publications on a table or balancing them on the edge of the shelf in the stacks.

A trained legal researcher who left for World War I and returned in 1968 would have been able to resume legal research, without the need to learn new tools or techniques. In fact, in using a library of print sources, that pre-WWI legal researcher would still be effective.

Now a trained legal researcher who takes a long vacation may discover that a favorite electronic service has been upgraded beyond recognition or that a new electronic resource holds great promise. The current pace of change in legal research, made possible by technological advances, means that law librarians constantly have to learn new techniques and tools just to stay current. This is the lifetime learning that was discussed in library school. **LLL**

## Reference Sources at Your Fingertips: *Sheppard Mullin's Training for Legal Secretaries*

*Scott Wales, Sheppard Mullin Richter & Hampton LLP*

**W**ay back in the early 1990s, I was invited to speak at a conference of legal secretaries. The topic was reference sources in the library. I remember dragging two old litigation bags full of books such as the Martindale-Hubbell directories, Standard & Poor's, and the Directory of Corporate Affiliations.

Fast forward nearly a decade and a half. I was recently instructed to give a presentation to our staff in the Washington and New York offices on library resources. This time, given the shift to electronic resources, my muscles did not get the work-out they so sorely needed, but that may have been a blessing since now I am well into middle age.

Educating legal secretaries on the use of basic legal resources helps to leverage firm resources. Secretaries appreciate the idea of being able to locate a variety of information on their own that formerly would have required visiting the library for help or making a phone call to the librarian. This self-sufficiency also frees up the reference staff for more complicated questions.

To train the firm's secretaries, our national library director, Martin Korn, designed a program entitled "15 Tricks in 15 Minutes" for the secretarial staff in the Los Angeles office. This program shows secretaries how to find a variety of information using electronic sources. For example, one "trick" is how to use PACER to pull up docket information. Another is using our subscription to Bender.com to locate practice forms. I modified the program for our East Coast offices, with emphasis on links to District of Columbia and New York courts, for example.

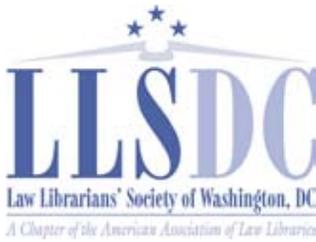
In "15 Tricks in 15 Minutes," legal secretaries and other staff are taught how to find information easily from their desks, where a trip to the library would have been formerly required. Training has been well received. Secretaries appreciate the opportunity to learn about legal and non-legal sources, and the seminars were made entertaining by pulling up cases such as *United States v. Satan*, looking up long-lost friends, and linking to odd-sounding businesses. It also helps to serve a good lunch.

Legal secretaries, attorneys, and firm staff alike benefit from another electronic resource discussed in our training program — the firm's Intranet. Sheppard Mullin's intranet homepage is named "Pipeline," a surfer reference reflecting our California headquarters. Pipeline is our way of disseminating information throughout the firm. Policies and forms are posted there and the various practice groups each have links to their own information. The library also has its own page within Pipeline. Working closely with the firm's technology department, the library maintains links to hundreds of various sources. In addition, all materials throughout the six branch libraries of Sheppard Mullin are cataloged on Pipeline, and that catalog is available to employees of the firm.

The legal secretaries' training program works for two reasons. First, Pipeline itself is a valuable resource, linking to a wide number of business and legal resources that the librarians are constantly looking to expand. Second, through the training, the secretaries have access to much-needed information in the absence of a large physical collection and reference staff.

So, in the new century I went from weightlifter to surfer along the "Pipeline." In any event, reference work is still pretty gnarly, dude. **LLL**

**Educating legal secretaries on the use of basic legal resources helps to leverage firm resources. This self-sufficiency also frees up the reference staff for more complicated questions.**



### Executive Director

Bonnie Fedchok  
703/619-5033  
P.O. Box 14306  
Washington, D.C. 20044  
<http://www.llsdc.org>  
[exec@llsdc.org](mailto:exec@llsdc.org)

### EXECUTIVE BOARD

#### President

**Billie Jo Kaufman**  
202/274-4374  
[bkaufman@american.edu](mailto:bkaufman@american.edu)

#### Vice President/ President-Elect

**Abigail Ross**  
202/434-4148  
[rossa@khlaw.com](mailto:rossa@khlaw.com)

#### Recording Secretary

**Barbara Fisher**  
202/263-3314  
[bjfisher@mayerbrownrowe.com](mailto:bjfisher@mayerbrownrowe.com)

#### Corresponding Secretary

**Carla Evans**  
202/416-6899  
[cevens@proskauer.com](mailto:cevens@proskauer.com)

#### Treasurer

**Christine Ciambella**  
703/993-8111  
[cciambel@gmu.edu](mailto:cciambel@gmu.edu)

#### Assistant Treasurer

**Laurie Green**  
202/508-6055  
[laura.green@bryancave.com](mailto:laura.green@bryancave.com)

#### Immediate Past President

**Elizabeth LeDoux**  
202/662-6151  
[eledoux@cov.com](mailto:eledoux@cov.com)

### BOARD MEMBERS

**Joan Scherer**  
202/647-1146  
[schererjm@state.gov](mailto:schererjm@state.gov)

**Karen Silber**  
202/452-4631  
[ksilber@bna.com](mailto:ksilber@bna.com)

**Lisa Harrington**  
202/457-5911  
[lisa.harrington@hklaw.com](mailto:lisa.harrington@hklaw.com)

### SPECIAL INTEREST SECTIONS

#### Academic

**Frances Brillantine**  
202/319-4331  
[brillantine@law.edu](mailto:brillantine@law.edu)

#### Federal

**Susan Panasik**  
202/619-3719  
[susan.panasik@hhs.gov](mailto:susan.panasik@hhs.gov)

#### Foreign & International

**Janice Fridie**  
202/344-4879  
[jfridie@venable.com](mailto:jfridie@venable.com)

#### Interlibrary Loan

**Sara Balls**  
202/772-5800 x3149  
[balls@blankrome.com](mailto:balls@blankrome.com)

#### Legislative Research

**Margot Gee**  
202/639-7365  
[geema@ffhsj.com](mailto:geema@ffhsj.com)

#### Private Law Libraries

**Carolyn McKelvey**  
202/662-6157  
[cmckelvey@cov.com](mailto:cmckelvey@cov.com)

### COMMITTEE CHAIRPERSONS

#### Arrangements

**Kate Martin**  
202/496-7752  
[kmartin@mckennalong.com](mailto:kmartin@mckennalong.com)

**Laurie Green**  
202/508-6055  
[laura.green@bryancave.com](mailto:laura.green@bryancave.com)

#### Bylaws Revisions

**William H. Grady**  
202/508-9858  
[williamgrady@paulhastings.com](mailto:williamgrady@paulhastings.com)

#### Education

**Craig Lelansky**  
202/662-9182  
[Cdl3@law.georgetown.edu](mailto:Cdl3@law.georgetown.edu)

**Matthew Braun**  
202/994-8545  
[mbraun@law.gwu.edu](mailto:mbraun@law.gwu.edu)

**Julie Bozzell**  
202/533-2397  
[bozzellj@gtlaw.com](mailto:bozzellj@gtlaw.com)

#### Elections

**Mike Gentile**  
202/942-5409  
[michael\\_gentile@aporter.com](mailto:michael_gentile@aporter.com)

#### History & Archives

**Heather Bourk**  
202/662-9133  
[Hcb3@law.georgetown.edu](mailto:Hcb3@law.georgetown.edu)

#### Joint Spring Workshop

**Kate Martin**  
202/496-7752  
[kmartin@mckennalong.com](mailto:kmartin@mckennalong.com)

**Kelly Yuzawa**  
202/822-3621  
[kyuzawa@zuckerman.com](mailto:kyuzawa@zuckerman.com)

**Laurie Green**  
202/508-6055  
[laura.green@bryancave.com](mailto:laura.green@bryancave.com)

#### Law Library Lights

**Dawn Bohls**  
202/662-6180  
[dbohls@cov.com](mailto:dbohls@cov.com)

#### Membership

**Mary Woodruff**  
202/274-2876  
[maryelizabeth.woodruff@troutmansanders.com](mailto:maryelizabeth.woodruff@troutmansanders.com)

**Amy Taylor**  
202/662-9141  
[Amt54@law.georgetown.edu](mailto:Amt54@law.georgetown.edu)

#### Mentoring

**Scott Bailey**  
202/626-6708  
[ScottBailey@ssd.com](mailto:ScottBailey@ssd.com)

**Pamela Gregory**  
301/952-3438  
[pgregory2@earthlink.com](mailto:pgregory2@earthlink.com)

#### Nominations

**Martha Klein**  
202/496-7844  
[mklein@mckennalong.com](mailto:mklein@mckennalong.com)

#### Placement

[TBD]

#### Publications

**Keith Gabel**  
202/466-2388  
[kgabel@stewartlaw.com](mailto:kgabel@stewartlaw.com)

#### Public Relations

**Kevin Dames**  
202/541-9671  
[kmdames@i-brarian.com](mailto:kmdames@i-brarian.com)

#### Scholarships & Grants

**Iris Lee**  
202/944-2733  
[ilee@law.gwu.edu](mailto:ilee@law.gwu.edu)

#### Volunteer

**Julia Leggett**  
202/707-6779  
[JLEGGETT@crs.loc.gov](mailto:JLEGGETT@crs.loc.gov)

**Joyce Baker**  
202/739-6424  
[Joyce.Baker@morganlewis.com](mailto:Joyce.Baker@morganlewis.com)

#### Web Site

**Paul Weiss**  
202/434-4277  
[weiss@khlaw.com](mailto:weiss@khlaw.com)  
[webmaster@llsdc.org](mailto:webmaster@llsdc.org)

**Konrad Rieke**  
[Konrad.Rieke@lw.com](mailto:Konrad.Rieke@lw.com)

### FOCUS GROUPS

#### Franklin Square Group

**Scott Larson**  
202/789-6166  
[slarson@bdlaw.com](mailto:slarson@bdlaw.com)

**Ann Green**  
202/408-6452  
[agreen@sonnenschein.com](mailto:agreen@sonnenschein.com)

#### Legal Research Training Group

**Cindy Carlson**  
703/203-5187  
[Cindy.Carlson@thomson.com](mailto:Cindy.Carlson@thomson.com)

#### Library Managers' Group

**Barbara Folensbee-Moore**  
202/739-5131  
[Bfolensbee-moore@morganlewis.com](mailto:Bfolensbee-moore@morganlewis.com)

### LAW LIBRARY LIGHTS

#### Editor

**Dawn Bohls**  
202/662-6180  
[dbohls@cov.com](mailto:dbohls@cov.com)

#### Assistant Editor

**Shannon O'Connell**  
202/434-5303  
[soconnell@wc.com](mailto:soconnell@wc.com)

#### Eye on Serials

**Susan Chinoransky**  
202/994-8902  
[schinoransky@law.gwu.edu](mailto:schinoransky@law.gwu.edu)

#### Tech Talk

**Roger Skalbeck**  
703/993-8180  
[rskalbec@gmu.edu](mailto:rskalbec@gmu.edu)

#### Member News

**Amy Taylor**  
202/662-9141  
[Amt54@law.georgetown.edu](mailto:Amt54@law.georgetown.edu)

#### Publisher/Graphic Designer

**Cindy Dyer**  
Dyer Design  
703/971-9038  
[dyerdesign@aol.com](mailto:dyerdesign@aol.com)