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The Law Firm Information Center and Practice Technology Support

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Information Gets Gathered

Providing current awareness alerts is one of the mainstays of being a law firm librarian. In today's overwrought news market, though, the accumulation of articles can be so unwieldy as to render the results virtually useless. The copyright restrictions mandated by LexisNexis and Westlaw* regarding alerts results limits storage of these articles in machine-readable form to 90 days. Even so, some of my alerts routinely yield over 50 articles per day. Taking into account the 90-day retention limit, we're still looking at the kind of influx that can make searching and managing these articles difficult using our email folder systems and elementary search capabilities.

What happens when an attorney wants to know which of the 5,000 articles you have stored in your alerts mentions a specific term or issue?

This very situation arose for me. I have been tracking news stories on a very broad SEC issue – an issue that has involved many, many high-profile companies and has resulted in SEC indictments and litigation. My email folder containing the results of my daily searches was massive. Also thrown into this mix are scores of SEC filings related to the search issue as well as court dockets.

Yes, we all have email systems that can search the text of our emails, but what about attachments? Different services deliver alerts results in different formats. I, for one, don't always feel satisfied that my email application's "magnifying glass" is doing a top notch job for me. And again, there is the issue of the SEC filings and dockets. In my case, some of the emails contain information in the body of the email and some contain information in attachments. Attachments can be in Word, Rich Text Format, XML or Adobe Acrobat. Email searches do not include content in attachments. Naturally, if the attorney wants to search information back to the beginning of time, I would have to re-run the searches in the respective databases anyway, but for purposes of this article, I'm talking about the last 90 days of gathered email alerts.

Practice Technology Support to the Rescue

When the attorney made his request, he also suggested that I turn to our Practice Technology Support (PTS) department. Organizing information is their raison d'être. They use sophisticated document repository programs such as Concordance. Concordance enables case teams to review, search, and organize millions of documents in real-time while categorizing them by topic, issue or responsiveness.

The process goes something like this: I tell PTS what information I want, i.e., all the emails in a particular folder. PTS then creates an Outlook file containing only those emails. PTS then processes that email file in preparation to be loaded into Concordance. By processing, I mean that PTS will divide up the different types of information so that each occurrence of

each type is a separate and searchable document. This means that when all has been loaded into Concordance, I will be able to search via full text all of the information I have gathered for the past 90 days: text in the bodies of emails and all attachments, regardless of format. This type of tunneling down for tidbits of information is impossible any other way.

Once I have located the documents that relate to the attorney's request, I can compile the information. In this particular instance, I was looking for not only those news articles relevant to the request but SEC exhibits – specifically, severance packages. After PTS arranged my data, I was able to pinpoint the documents I needed for the attorney. After that, I needed only delete the news articles. The other documents were public.

By working with a technology support department, librarians can provide searchable, electronic data any time and anywhere and in any combination. This drastically reduces the searching time as well as production costs for the trial team later on. The integration is key, allowing files to be easily accessed. Litigators can conduct legal research directly from their discovery documents.

I'm not here to plug Concordance (anymore than I have already), I'm just writing to say that librarians can take advantage of what have traditionally been litigation tools to manage their own files and mounds of information. In the past, I've often felt that the alerts I had gathered were collecting the "proverbial" dust and I was more apt to re-run the searches than plow through the material. What I also find beneficial from this process is that, personally, I feel more connected to the firm. Librarians and the research they provide are often the "jumping off" place or the "fill in the gaps" measure. For me, it's rewarding to see where our work is fitting in and how it's being used.

I have the partner in my firm to thank for opening up my eyes and showing me how to work with Practice Technology Support department to better serve our attorneys research and retrieval needs.

*LexisNexis: "With respect to all Materials other than Authorized Legal Materials and Authorized Patent Materials, the right to retrieve via downloading commands of the Online Services and store in machine-readable form for no more than 90 days, primarily for one person's exclusive use, a single copy of insubstantial portions of those Materials included in any individual file to the extent the storage of those Materials is not further limited or prohibited by the Supplemental Terms for Specific Materials." Terms & Conditions §1(e), www.lexis.com.

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