

**American Association of Law Libraries
Committee on Relations with Information Vendors**

**REPORT: West Group Reverse Site Visit
November 16, 2000**

ITINERARY

University of Minnesota Law Library (morning)
Faegre & Benson Law Firm (afternoon)

PARTICIPANTS

West Group:

Kathleen Donohue (Kate), Customer Service Representative II
Lori Hedstrom, Program Manager, Librarian Relations
Sandy Johnson, Customer Service Representative
Mark Witzany, Director, Call Center and Training, Customer Service

University of Minnesota Law Library:

Margie Axtmann, Assistant Director for Collections and Technical Services
Suzanne Thorpe, Associate Director for Faculty, Research, and Instructional Services
Craig Olson, Head of Acquisitions

Faegre & Benson LLP:

Nina Platt, Director of Library Services
Sarah Jirik, Library Acquisitions Specialist

Minnesota Association of Law Libraries (MALL):

Pat Cummings, Manager of Research Services, Leonard, Street and Deinard, MALL
President
Sara Galligan, Law Library Manager, Dakota County Law Library, CRIV Member
Peggy Hall, Technical Services Librarian, Hennepin County Law Library, MALL
Member

The visit began at the University of Minnesota Law Library with a brief introductory meeting. Mark Witzany from the West team was interested in the legal research program at the university. Suzanne Thorpe, Associate Director for Faculty, Research and Instructional Services at the Law Library discussed the subject matter taught to first year students and listed actual tasks assigned to students involving both print and electronic research. Their program responds to multiple issues and begins with teaching about the print publications. The Law Library also trains students on all online legal research systems. For Westlaw, West trainers perform online training. The Law Library also teaches advanced legal research, which includes research in secondary materials.

From 9:00-9:30, Suzanne Thorpe gave a tour of the main floor of the Law Library. The university law library falls within the top ten for size, nationally, and has just added its 900,000th volume. The tour included a visit to the computer lab where CALR instruction is offered.

From 9:30-11:30, the West team met in the technical services area of the Law Library for a demonstration of the acquisition system. Craig Olson, Head of Acquisitions for the Law Library, explained the details of the automated acquisitions process, originating with a book order all the way through to final cataloging and

**American Association of Law Libraries
Committee on Relations with Information Vendors**

shelving of materials. Craig gave all members handouts showing screen displays of the automated processes. He explained the integration of records with the online catalog display and explained the use of various codes used by library staff to record a good deal of content about the evolving status of an order. His examples, which were focused on West titles, demonstrated the high level of manual input required by the online system. The university is looking forward to a new integrated library system in the next couple of years. This system may reduce the amount of manual input and increase the ability to automatically retrieve information, such as West invoice reference numbers, which are not currently searchable in their system.

A lively discussion ensued regarding claiming. Craig praised Sandy Johnson on the West team for resolving many claim problems for West items. His impression is that difficult claims are resolved by email or phone messages to Sandy. The university's online system also sends to West an automatic claim notice. The Law Library seems to get response from this standard claim method. Mark Witzany mentioned that one area of customer service that has helped a great deal is dedicated support academic accounts. West is trying a number of different customer support models, and this one has been quite successful. The group discussed the roles of the sales representative in this process. Margie Axtmann, Assistant Director for Collections and Technical Services for the Law Library asked for clarification about whether most claims should go through the local sales representative or not. Margie emphasized that the library wants to maintain a good business practice relationship with West. The West representatives acknowledged that it is sometimes more effective for library customers to work with their own sales representative rather than calling Customer Service, and that there is no hard and fast rule about how to approach this issue.

Regarding Internet ordering, the Law Library has credit card authorization and can place orders via the Internet. The Law Library is testing this for cost savings and efficiency. The Law Library has found some West titles available at reduced prices from Internet providers. The Internet also seems efficient for rush orders. Margie remarked that she was not comfortable cutting off publisher sales representatives, but cost and efficiency are factors in determining the method of purchase.

Regarding processing new materials, a question came up about the need for multiple copies of filing instructions to accompany shipments that contain a variety of materials. This would allow one set of instructions to go with pocket parts and another set of filing instruction to go with a bound volume that moves through the process in a separate direction, e.g. to cataloging or labeling. West replied that filing instructions are available on their web site. If questions arise about particular items, that would be a place to check for proper filing. (See <http://store.westgroup.com/store/instructions/> for looseleaf replacement and filing instructions) Note: This information was covered in a recent CRIVGram, sent by Stephanie Edwards on November 27, 2000.

Margie asked if West could supply a list of all the library's subscriptions and standing orders. West can produce such a list, and the University of Minnesota received its list electronically shortly after the visit.

During lunch, additional MALL members attended, including the hosts for the Faegre law firm visit, two county law librarians, and the MALL president. The luncheon, which was graciously hosted by the law school library, stimulated lively and varied

**American Association of Law Libraries
Committee on Relations with Information Vendors**

discussion. Librarians learned about some West perks, such as turkeys at Thanksgiving for all employees and fruit each Tuesday. More to the theme of the meeting, participants discussed the impact of higher prices on public law libraries (resulting in cancellation of resources), the expansion of electronic items, the breadth of West (into the non-legal world), and how West trains customer service staff. Of particular interest was the discussion describing how West arrives at customer service solutions. Mark encouraged users to be proactive when talking with any customer service representative. Ideas and recommendations generated at this level advance to upper levels of the company. Problems that require Advisory Board attention can thus advance to a level where discussion and consensus may produce the best customer solution.

The West team left the university after lunch to visit the downtown Minneapolis law firm of Faegre & Benson LLP. Faegre library director Nina Platt gave a tour of the Main library as well as one of the firm's satellite libraries. After the tour, the team settled in for a demonstration of the firm's library management system Intranet. Several members of the Faegre library staff rotated through the demonstration room to discuss their particular areas of responsibility.

The Faegre & Benson library has a dedicated Internet staff and dedicated technical services staff. Orders come to the law library via the firm's email system, by telephone and in-person requests. Nina partners with a law firm library liaison from each practice group for materials selection. Her automated library system looks much different from that of the university. End users interact with the catalog, routing information and purchase request forms using a web interface built using a combination of Inmagic DBTextWorks and ColdFusion (Allaire). Their library applications are custom-built catalog, serials and acquisition databases. DBTextWorks provides for the creation of relationships between databases, which in turn allow the catalog and serials records to be linked.

Specific customer service questions involved the firm's need for next day delivery. Another problem results when West bills annual subscriptions on a line item statement. The library would prefer an actual invoice, and they have created their own form for bill paying. Like the university, they do not input West reference numbers to their automated system, so they do not use them for searching. They suggested a need for information on a West web site that stated the latest release for an item. They would use this information for claiming purposes. They also suggested that it would be useful to be able to access their account information via a West Group extranet. Mark said this service would be coming next spring.

Other staff demonstrated some advanced applications more unique to the law firm environment. One application involved the firm's move to electronic resource retrieval via the firm's Intranet. Research pages as well as legal databases are available. They also plan to add an online resources guide to assist users in finding online titles. Faegre library staff also support an application called FIDO (Faegre Interactive Documents Online). This advanced application uses database software for work product support on the firm's Intranet.

In conclusion, the CRIV reverse site visit gave West representatives a view of the large-scale automated operations at the university versus futuristic law firm applications. The West team had a chance to observe highly complex and technical operations as well as highly customized and specialized methods for legal

**American Association of Law Libraries
Committee on Relations with Information Vendors**

information management. The field visits afforded opportunities to exchange information about detailed problems arising from a progressive display of actual workflow in library technical service operations. In describing some of the operations, law library staff inadvertently referred to library applications not known by the West customer service team members. However, an asset for the West team was participation by Lori Hedstrom, Program Manager for Librarian Relations for West. Lori's background as a law librarian permitted her to quickly identify jargon and applications that were unfamiliar to her team members. She was prompt in clarifying various library technicalities for them.

For a day, the West team had a chance to study the inside operations of two law libraries. CRIV thanks all the host library staff for their efforts in creating this successful event. CRIV hopes to continue promoting the professionalism and constructive exchange enjoyed by all parties here in Minnesota. I would highly recommend that CRIV continue to explore opportunities for site visits among the legal publishers we work with regularly.

**Sara Galligan
Dakota County Law Library, Hastings, MN**