

# What Is DRM and How Can We Use It to Track Digital Resources?



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Hughes Hubbard & Reed

Loretta Orndorff, Director of Library Services  
Cozen O'Connor

*May 21, 2014*



# Agenda

What Is Digital Resource Management (DRM)?

Lookup Precision Case Study at Dechert

Research Monitor Case Study at Hughes Hubbard

Onelog Case Study at Cozen O'Connor

# Cost Recovery and Online Services Tracking at Dechert LLP

How LookUp Precision is utilized to

- determine the value of online services via usage tracking
- improve efficiencies in password management and cost recovery

# What exactly is LUP?

- ▶ **LookUp Precision:** An online resource usage tracking and reporting tool that enables law firms to gauge overall usage as well as monitor individual transactions if required.
- ▶ It also includes password administration that automatically populates login fields and maintains updated password lists.



# Dechert's return on investment:



- ▶ LUP has improved the firm's cost recovery efforts by utilizing client validation when accessing LN, WL & Pacer. Users must select from the firm's client matter number list, and choose a valid billing number (a reload of the client matter list is implemented in LUP every night via Elite)
  - Client validation helps the firm recoup costs on our major fee-based services.
- ▶ Usage tracking over a long duration of time allows the Dechert Library to evaluate how often a service is being used, by whom and determine if the service is worth renewing, or negotiating at a lower price.
- ▶ From a risk management aspect, usage tracking also allows the Dechert Library to identify users who are sharing individual ids. The users are contacted by the Technical Services Manager and individual ids are assigned if needed.



# What does the system do well?

- ▶ Client validation
- ▶ Users most recent client billing numbers are auto-saved when accessing a service
- ▶ Custom script building for special web services (example: NYLI's ebook gateway)
- ▶ Simple user interface for web service tracking and report building

# What are some of the system's challenges?

- ▶ No password utility for end users
- ▶ LUP application can be disabled by tech savvy end users
- ▶ Cannot track attachments (Word, PDF) which are popular formats for email newsletters
- ▶ Cannot track usage outside your firm's network
- ▶ Cannot track usage on mobile devices and tablets yet

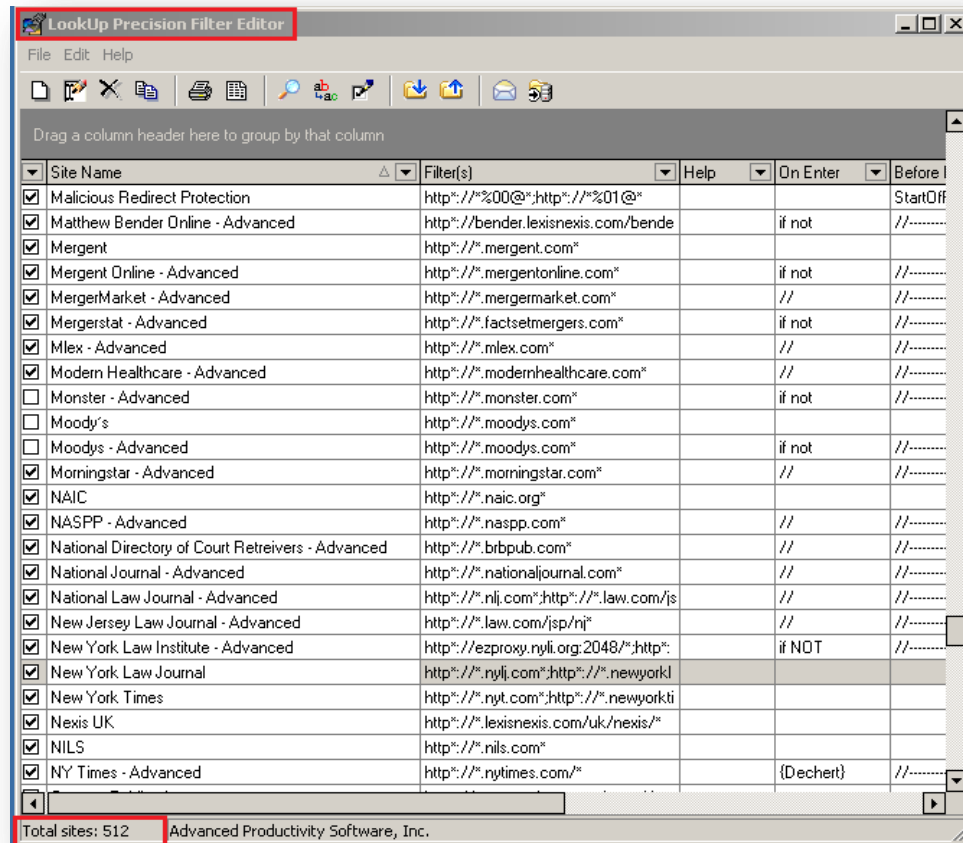


# What needs to be considered before implementation ?

- ▶ Check the system requirements
- ▶ Check browser support capabilities (IE, Firefox, Chrome, etc)
- ▶ Document all functionality requirements needed at your firm
- ▶ Determine if the solution can be supported at the firm, and by whom (this is critical to the successful management of the service)

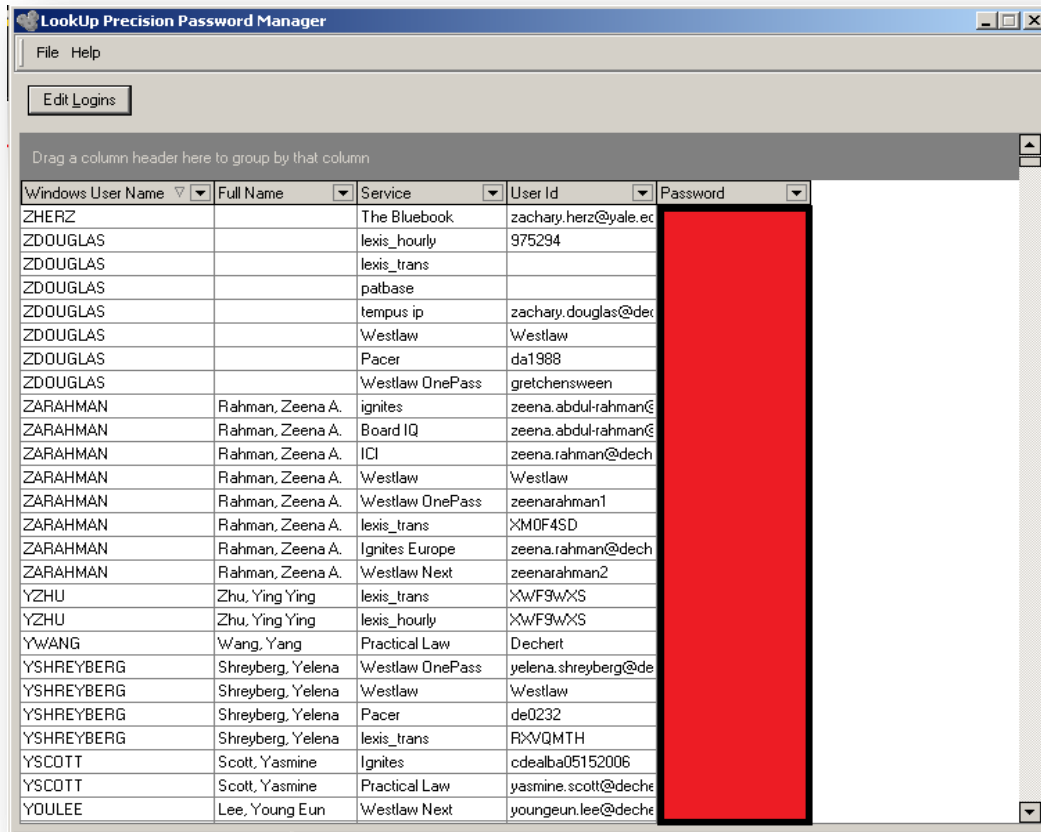


# LUP Filter Editor



The Filter Editor is where URLs are defined to be logged and customizable scripts that control validation functions are entered and managed.

# Password Manager





| Windows User Name | Full Name         | Service         | User Id              | Password |
|-------------------|-------------------|-----------------|----------------------|----------|
| ZHERZ             |                   | The Bluebook    | zachary.herz@yale.ec |          |
| ZDOUGLAS          |                   | lexis_hourly    | 975294               |          |
| ZDOUGLAS          |                   | lexis_trans     |                      |          |
| ZDOUGLAS          |                   | patbase         |                      |          |
| ZDOUGLAS          |                   | tempus ip       | zachary.douglas@de   |          |
| ZDOUGLAS          |                   | Westlaw         | Westlaw              |          |
| ZDOUGLAS          |                   | Pacer           | da1988               |          |
| ZDOUGLAS          |                   | Westlaw OnePass | gretchensween        |          |
| ZARAHMAN          | Rahman, Zeena A.  | ignites         | zeena.abdul-rahman@  |          |
| ZARAHMAN          | Rahman, Zeena A.  | Board IQ        | zeena.abdul-rahman@  |          |
| ZARAHMAN          | Rahman, Zeena A.  | ICI             | zeena.rahman@dech    |          |
| ZARAHMAN          | Rahman, Zeena A.  | Westlaw         | Westlaw              |          |
| ZARAHMAN          | Rahman, Zeena A.  | Westlaw OnePass | zeenarahman1         |          |
| ZARAHMAN          | Rahman, Zeena A.  | lexis_trans     | XMF4SD               |          |
| ZARAHMAN          | Rahman, Zeena A.  | Ignites Europe  | zeena.rahman@dech    |          |
| ZARAHMAN          | Rahman, Zeena A.  | Westlaw Next    | zeenarahman2         |          |
| YZHU              | Zhu, Ying Ying    | lexis_trans     | XWF9WXS              |          |
| YZHU              | Zhu, Ying Ying    | lexis_hourly    | XWF9WXS              |          |
| YWANG             | Wang, Yang        | Practical Law   | Dechert              |          |
| YSHREYBERG        | Shreyberg, Yelena | Westlaw OnePass | yelena.shreyberg@de  |          |
| YSHREYBERG        | Shreyberg, Yelena | Westlaw         | Westlaw              |          |
| YSHREYBERG        | Shreyberg, Yelena | Pacer           | de0232               |          |
| YSHREYBERG        | Shreyberg, Yelena | lexis_trans     | RXVQMTM              |          |
| YSCOTT            | Scott, Yasmine    | Ignites         | cdealba05152006      |          |
| YSCOTT            | Scott, Yasmine    | Practical Law   | yasmine.scott@dech   |          |
| YOULEE            | Lee, Young Eun    | Westlaw Next    | youngeun.lee@dech    |          |

The Password Manager tool captures user ids & passwords of Dechert employees and attorneys.

# Client validation

LookUp Precision - Copyright © 1991-2013, SydneyPLUS, Inc., Patent Pending.

Westlaw. Class  
Sign On with OnePass

LookUp Precision<sup>®</sup>    
ONLINE USAGE TRACKING & RESOURCE COST MANAGEMENT  
Advanced Productivity Software, Inc.

Client: 999003 Administrative  
Matter: 840821 BO - Library Svcs - PG 21  
Comments: This is a test

OK Cancel Help

Step 1: User accesses a fee based service, and a client validation box pops up. A billing code is entered.

Sign On with OnePass Switch to Westlaw Password Sign On

OnePass Username:   
OnePass Password:   
Client ID:

Remember Username  
 Remember Username & Password  
 Return to last research trail

Sign On

**Help**  
Forgot Username or Password?  
Register my Westlaw Password  
Edit or Update OnePass Account  
Do I have a OnePass Account?  
What is OnePass?

**Technical Support**  
1-800-WESTLAW (1-800-937-8529)

Step 2: The user's credentials, along with a billing number, are populated by LUP.

# Standard usage report in LUP

| 1 Site Usage - Most Used by Site, User |        |        |        |           |             |  |
|--|--------|--------|--------|-----------|-------------|--|
| 2 For Dates: 1/1/2014 through 5/1/2014 |        |        |        |           |             |  |
| 3 Generated: 5/1/2014 12:31:39 PM      |        |        |        |           |             |  |
| 4                                      |        |        |        |           |             |  |
| 5                                      | User   | Web    | Active | Total     |             |  |
| 6                                      | Count  | Pages  | Time   | Time      |             |  |
| 7 Site                                 | Visits | Viewed |        |           |             |  |
| 8 New York Times                       | 698    | 6255   | 252264 | 838:43:42 | 9966:50:56  |  |
| 9 Wall Street Journal - Advanced       | 646    | 3556   | 247930 | 320:35:45 | 5075:53:32  |  |
| 10 Accurint - Advanced                 | 319    | 3734   | 8360   | 57:59:07  | 712:24:52   |  |
| 11 Financial Times - Advanced          | 262    | 1206   | 21292  | 124:42:54 | 2064:05:19  |  |
| 12 American Lawyer - Advanced          | 250    | 1809   | 12619  | 94:33:37  | 1038:19:33  |  |
| 13 Pacer - Advanced                    | 225    | 2452   | 60573  | 203:36:44 | 9939:17:44  |  |
| 14 Westlaw - Advanced                  | 220    | 1276   | 179502 | 350:36:40 | 15927:25:12 |  |
| 15 Practical Law - Advanced            | 211    | 831    | 5453   | 50:14:12  | 2259:23:26  |  |
| 16 Knowledge Mosaic - Advanced         | 207    | 1683   | 22929  | 177:10:56 | 6347:30:54  |  |
| 17 Practical Law UK - Advanced         | 161    | 2067   | 27276  | 394:58:42 | 18581:23:53 |  |
| 18 CCH IntelliConnect - Advanced       | 147    | 1110   | 54109  | 204:50:08 | 4121:28:12  |  |
| 19 Morningstar - Advanced              | 146    | 297    | 5822   | 9:55:25   | 238:48:47   |  |
| 20 Westlaw - Find and Print            | 146    | 701    | 905    | 21:00:04  | 2137:59:43  |  |
| 21 New York Law Journal                | 128    | 409    | 2196   | 9:19:20   | 179:43:58   |  |
| 22 Companies House                     | 123    | 925    | 73876  | 106:16:46 | 3018:36:04  |  |
| 23 Westlaw Next - Advanced             | 115    | 1387   | 100102 | 954:27:31 | 6465:05:24  |  |
| 24 Law360 Securities - Advanced        | 107    | 695    | 1248   | 22:13:05  | 399:38:18   |  |
| 25 Ignites - Advanced                  | 103    | 1123   | 3731   | 45:26:28  | 1158:10:17  |  |
| 26 The Vault.com                       | 100    | 137    | 4181   | 6:06:41   | 165:38:19   |  |
| 27 Hein Online - Advanced              | 99     | 355    | 7215   | 38:03:54  | 669:46:56   |  |
| 28 Bloomberg Law - Advanced            | 97     | 712    | 16544  | 106:05:55 | 1169:09:03  |  |
| 29 Investment Company Institute        | 91     | 383    | 1644   | 12:42:08  | 683:52:29   |  |
| 30 Lexis - Advanced                    | 90     | 321    | 826    | 3:57:31   | 119:58:00   |  |
| 31 Lexis Get & Print                   | 88     | 237    | 1822   | 7:55:37   | 743:53:17   |  |

## ▶ DEFINITIONS ASSOCIATED WITH USAGE REPORTS FROM LOOKUP PRECISION

- ▶ **LookUp Precision:** An online resource usage tracking and reporting tool that enables law firms to gauge overall usage as well as monitor individual transactions if required.
- ▶ **Session:** a recorded period tracked by units of seconds
- ▶ **Site:** the name of the LookUp Precision filter that tracks the website
- ▶ **Time –**
- ▶ **Active Time:** the length of time that the website was in an active tab of the user's browser
- ▶ **Total Time:** the length of time that the user's browser was at the website, whether in the active tab or not
- ▶ **User:** the Windows login names of each user who accessed the website
- ▶ **User Count:** the number of users who accessed the website
- ▶ **Visits:** the number of tracked user sessions at the website
- ▶ **Web Pages Viewed:** the number of web pages visited by users at the website
- ▶ **Website:** a subscriber based site that includes an online database for retrieving information

## Questions?

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[dechert.com](http://dechert.com)

For more information on LookUp Precision, see

<http://www.lookup-precision.com/>

Dechert  
LLP

# Digital Resource Management using Research Monitor and SmartRecharge

# Research Monitor

- All the user information on all the people in the firm is populated by the active directory dynamically.
- All the client numbers are updated by a client matter file maintained by IT which is generated with Elite, the time and billing system and which also field the copiers and Document Manager system.
- The Library maintains all the details about the database.
- Firm doesn't current have module that does turn-aways called *ResearchPath*, and we don't have the module for mobile access called *ResearchHub*. We have core *Research Monitor* and *SmartRecharge*.



- Research Monitor Resources
- Resources
    - Accurint
    - Almanac Of The Federal Judiciary
    - BNA Securities Regulation and Law Report
    - CCH Intelliconnect
    - Chronicle of Higher Education
    - Cisions
    - Compensation Standards
    - Complinet
    - Corporate Counsel
    - Corporate Counsel Profiler
    - Daily Bankruptcy News
    - DealLawyers
    - Dun & Bradstreet
    - Dun & Bradstreet Family Tree Finder
    - Fastcase
    - Heinonline
    - HHR Portal
    - Hoovers
    - Investor State Law Guide
    - Law Journal Press
    - Law360 - Aerospace & Defense
    - Law360 - Appellate
    - Law360 - Bankruptcy
    - Law360 - Bankruptcy
    - Law360 - California
    - Law360 - Class Action
    - Law360 - Commercial Contracts
    - Law360 - Competition
    - Law360 - Consumer Protection
    - Law360 - Corporate
    - Law360 - Employment
    - Law360 - Energy
    - Law360 - Environmental
    - Law360 - Florida
    - Law360 - Government Contracts
    - Law360 - Health
    - Law360 - Hospitality
    - Law360 - Insurance
    - Law360 - Intellectual Property
    - Law360 - International Trade
    - Law360 - Legal Industry
    - Law360 - Life Sciences
    - Law360 - Media and Entertainment
    - Law360 - Mergers and Acquisitions
    - Law360 - Midwest
    - Law360 - New Jersey
    - Law360 - New York
    - Law360 - Pennsylvania
    - Law360 - Privacy and Consumer Protection
    - Law360 - Private Equity
    - Law360 - Product Liability
    - Law360 - Project Finance



### Summary Period

Today
  Last 30 Days
  Specific Dates  
 Current Month
  This Quarter

05/01/2014 to 06/01/2014

Refresh

### Firm Usage

01 May 2014 to 01 June 2014

17186 research sessions

557 researchers

50 resources used

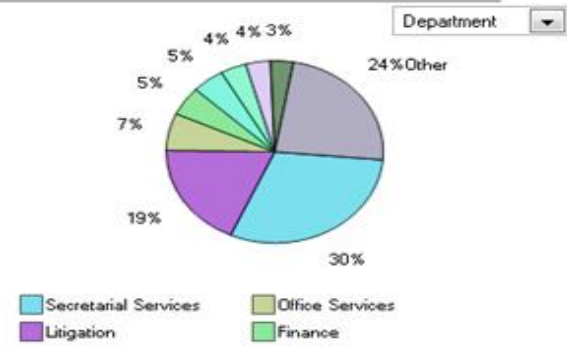
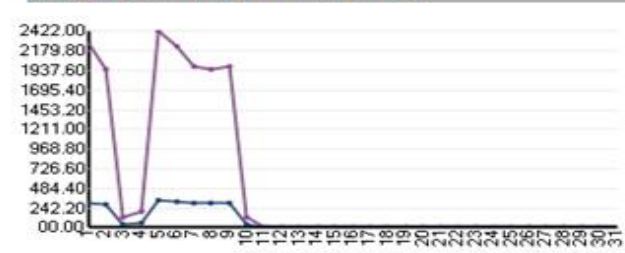
### Used Resources

| Resource          | Sessions | Activities | Users |
|-------------------|----------|------------|-------|
| HHR Portal        | 15130    | 125        | 437   |
| PACER             | 808      | 21109      | 126   |
| Westlaw Next      | 532      | 11586      | 59    |
| Securities Mosaic | 88       | 217        | 11    |
| Fastcase          | 73       | 2110       | 29    |
| PLC               | 53       | 66         | 16    |
| Heinonline        | 53       | 261        | 11    |

### Unused Resources

| Resource                         | Last Used |
|----------------------------------|-----------|
| Law360 - Energy                  | 4/30/2014 |
| Law360 - New Jersey              | 4/30/2014 |
| Law360 - Insurance               | 4/29/2014 |
| Dun_Bradstreet                   | 4/24/2014 |
| Law360 - Private Equity          | 4/22/2014 |
| Almanac Of The Federal Judiciary | 4/18/2014 |
| Law360 - Project Finance         | 4/9/2014  |

### Usage Summary - HHR Portal

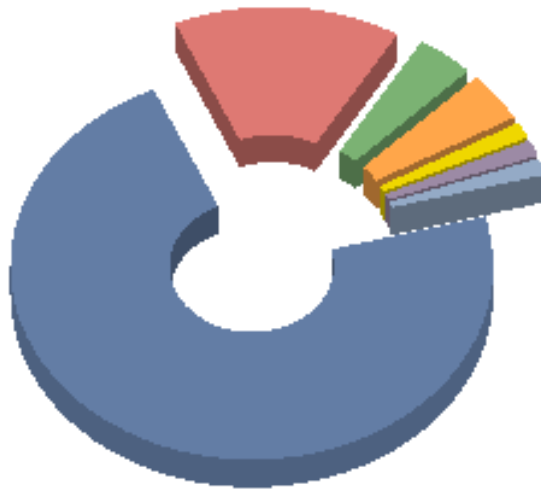


User and Session Counts per Day

Dashboard View of Research Monitor in Administrative Tool

Below is a view of Fastcase May usage at a high level from the Dashboard.

Usage By Departments



|                              |    |        |
|------------------------------|----|--------|
| Litigation                   | 53 | 72.6%  |
| Library                      | 11 | 15.1%  |
| Information Technology       | 3  | 4.1%   |
| Word Processing and Training | 3  | 4.1%   |
| Corporate Reorganization     | 1  | 1.4%   |
| New Business                 | 1  | 1.4%   |
| Secretarial Services         | 1  | 1.4%   |
| Total:                       | 73 | 100.0% |

**Fastcase Usage for May  
by Department**



This is a view of the add-on in the IE browser that provides the passwords to individuals users

Research Monitor Passwords

**ResearchMonitor**

Use this screen to view and update the logon credentials stored in ResearchMonitor. Any Firmwide or Groupwide credentials are readonly.

---

**Accurint**

Username

Password

**Almanac Of The Federal Judiciary**

Username

Password

**BNA Securities Regulation and Law Report**

Username

Password

**CCH Intelliconnect**

User Id


Password

**Chronicle of Higher Education**

---

\* Starred values are not editable as they are used by multiple people.

OK Cancel



How the Pacer Dragon was  
Slayed by Research Monitor  
and SmartRecharge...

a Librarian Fractured Fairy Tale






## CASE SEARCH SIGN IN

Your browser must be set to accept cookies in order to login to this site. If your browser is set to accept cookies and you are experiencing problems with the login, delete the stored cookie file in your PC. Close and reopen your browser before trying again.

### Login

Select a session type for this session.


X

> Document Filing

---

> Document Retrieval

NO  
only  
Titl
Connecting to PACER...





Researcher: 00535



---

> Matter Number


> Employee Id

> Comment

---

Cancel

Save

Researcher: 00535

---

> Matter Number

990100.01025



> Employee Id

Search results:

990100.01025 - General Office - Litigation Dept

> Comment


Cancel

Save



Search



> Matter Number

> Client Name

> Matter Name

Search

| Matter Number | Client Name                          | Matter Name |
|---------------|--------------------------------------|-------------|
| 009996.02000  | General Office-Billing Purposes Only | [REDACTED]  |
| 009996.02102  | General Office-Billing Purposes Only | [REDACTED]  |
| 009996.02150  | General Office-Billing Purposes Only | [REDACTED]  |
| 990100.00001  | General Office                       | [REDACTED]  |
| 990100.00005  | General Office                       | [REDACTED]  |
| 990100.00011  | General Office                       | [REDACTED]  |
| 990100.00111  | General Office                       | [REDACTED]  |

Cancel

Select

### Main Menu

-  **home**
-  **charges**
-  **file imports**
-  **notifications**
-  **admin**
-  **reports**

### Charge Summary

| Resource             | Current Month | Last Month        |
|----------------------|---------------|-------------------|
| Bloomberg Law        | ██████        | ██████            |
| Lexis                | ██████        | ██████            |
| LexisNexis Accurint  | ██████        | ██████            |
| LexisNexis Courtlink | ██████        | ██████            |
| PACER                | <u>\$0.00</u> | <u>\$6,530.10</u> |
| Westlaw              | ██████        | ██████            |
| Westlaw Business     | ██████        | ██████            |

### Recent Imports

| Import Date | Resource | Imported Rows | Total Value of Imported Charges | Source File              |
|-------------|----------|---------------|---------------------------------|--------------------------|
| 5/11/2014   | Lexis    | <u>10</u>     | ██████                          | <a href="#">Download</a> |
| 5/11/2014   | Westlaw  | <u>35</u>     | ██████                          | <a href="#">Download</a> |
| 5/11/2014   | Lexis    | <u>75</u>     | ██████                          | <a href="#">Download</a> |
| 5/11/2014   | PACER    | <u>7,825</u>  | ██████                          | <a href="#">Download</a> |
| 5/10/2014   | Westlaw  | <u>104</u>    | ██████                          | <a href="#">Download</a> |

⏪ ⏩ 1 2 3 4 ⏪ ⏩
Item 1 to 5 of 20

### Recently Triggered Notifications

| Title                                | Last Trigger Date | Charge Rows |
|--------------------------------------|-------------------|-------------|
| Westlaw Library Staff Charges Weekly | 5/12/2014         | <u>7</u>    |
| Westlaw Library Staff Charges Weekly | 5/12/2014         | <u>9</u>    |
| Westlaw Library Staff Charges Weekly | 5/12/2014         | <u>21</u>   |
| Westlaw Library Staff Charges Weekly | 5/12/2014         | <u>2</u>    |
| Westlaw Library Staff Charges Weekly | 5/12/2014         | <u>6</u>    |
| Lexis Library Staff Charges Weekly   | 5/12/2014         | <u>1</u>    |
| Lexis Library Staff Charges Weekly   | 5/12/2014         | <u>1</u>    |

⏪ ⏩ 1 2 3 ⏪ ⏩
Item 1 to 7 of 20

### Quick Access

#### quicklinks

- [unmapped charges](#)
- [non-billable charges](#)
- [non-payable charges](#)
- [excluded content charges](#)

#### quicksearch

- current month
- custom date range

from

to

*Enter search text*

Search All

**SEARCH**

#### billing partner summary

Partner:

- [show billing summary](#)
- [send summary email to me](#)
- [send summary email to partner](#)

# Charges

Enter search term in All Fields ▾

Search

Export ▾

Update Selected ▾

Resource PACER ▾ Show only ▾  show \$0

charges

For period Mar 2014 ▾

[Show filter row](#) | [Show comments](#)

Drag a column header and drop it here to group by that column

| <input type="checkbox"/> | Date     | Resource | Account | Researcher  | C/M Number | Narrative | Service       | Charge Description                             | Txns | List Price |
|--------------------------|----------|----------|---------|-------------|------------|-----------|---------------|--|------|------------|
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | DOCKET REPORT | (FLMDC) 3:09-CV-13080-WGY-HTS                  | 1    | \$0.10     |
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | DOCKET REPORT | (FLMDC) 3:08-CV-00159-HLA-HTS                  | 1    | \$0.90     |
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | IMAGE2-0      | (FLMDC) 3:08-CV-00159-HLA-HTS<br>DOCUMENT 2-0  | 1    | \$0.70     |
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | IMAGE13-0     | (FLMDC) 3:08-CV-00159-HLA-HTS<br>DOCUMENT 13-0 | 1    | \$0.30     |
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | IMAGE24-0     | (FLMDC) 3:08-CV-00159-HLA-HTS<br>DOCUMENT 24-0 | 1    | \$2.20     |
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | DOCKET REPORT | (FLMDC) 3:09-CV-11080-WGY-HTS                  | 1    | \$1.50     |
| <input type="checkbox"/> | 3/2/2014 | PACER    | HH0002  | Lyons, John | ██████████ | LYONS     | IMAGE4-0      | (FLMDC) 3:09-CV-11080-WGY-HTS<br>DOCUMENT 4-0  | 1    | \$3.00     |

# Charges

Enter search term  in

**Search**

**Export** ▾

**Update Selected** ▾

Resource  Show only   show \$0

charges

For period   to

[Show filter row](#) | [Show comments](#)

Drag a column header and drop it here to group by that column

| <input type="checkbox"/> | Date | Resource | Account | Researcher | C/M Number | Narrative | Service | Charge Description | Txns | List Price | Included | Excluded List Price | Excluded | Tax | Total Charge | Raw Data |
|--------------------------|------|----------|---------|------------|------------|-----------|---------|--------------------|------|------------|----------|---------------------|----------|-----|--------------|----------|
|--------------------------|------|----------|---------|------------|------------|-----------|---------|--------------------|------|------------|----------|---------------------|----------|-----|--------------|----------|

No records to display.

# Example of Notification

Search for WorkSite location (Ctrl+9) [Icons] File

From:  no-reply@smartrechargehq.com  
To:  Barbone, Patricia;  Tung, Wai-Shang;  Perez, Kristen  
Cc:  
Subject: SmartRecharge: Westlaw Usage Summary Daily - \$14,954.17

1 2 3 4 5 6 7 8

This is a daily Westlaw usage summary generated by SmartRecharge.

The total imported Westlaw charges on 5/9/2014 amounted to \$14,954.17. Please click [here](#) to view the charge details.

---

*\*\*Summary details of the charges triggering this notification\*\**

**Notification period:** 5/9/2014  
**Resource:** Westlaw  
**Total of imported charges (including tax):** \$14,954.17  
**Total of billable charges:** \$14,569.83  
**Total of non-billable charges:** \$384.34  
**Included charges (discounted without tax):** \$13,974.00  
**Excluded charges (discounted without tax):** \$0.00

- **Can use Active Directory to compile groups or use static groups.**
- **Best use. Summer Associate Usage**
- **Can set up alerts on**

# Charges

Enter search term  in

**Search**

**Export** ▾

**Update Selected** ▾

Resource  Show only   show \$0

charges

For period   to

[Show filter row](#) | [Show comments](#)

Drag a column header and drop it here to group by that column

| <input type="checkbox"/> | Date | Resource | Account | Researcher | C/M Number | Narrative | Service | Charge Description | Txns | List Price | Included | Excluded List Price | Excluded | Tax | Total Charge | Raw Data |
|--------------------------|------|----------|---------|------------|------------|-----------|---------|--------------------|------|------------|----------|---------------------|----------|-----|--------------|----------|
|--------------------------|------|----------|---------|------------|------------|-----------|---------|--------------------|------|------------|----------|---------------------|----------|-----|--------------|----------|

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**Notification period:** 5/9/2014  
**Resource:** Westlaw  
**Total of imported charges (including tax):** \$14,954.17  
**Total of billable charges:** \$14,569.83  
**Total of non-billable charges:** \$384.34  
**Included charges (discounted without tax):** \$13,974.00  
**Excluded charges (discounted without tax):** \$0.00

- **Can use Active Directory to compile groups or use static groups.**
- **Best use. Summer Associate Usage**
- **Can set up alerts on**

# Monthly Discount Charge Analysis by Billable/Non-Billable

Year: 2013

Resource: Westlaw

## Actual Charges:

| Date                | Billable      | Non-Billable  | Total         |
|---------------------|---------------|---------------|---------------|
| Jan - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Feb - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Mar - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Apr - 2013          | \$0.00        | \$0.00        | \$0.00        |
| May - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Jun - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Jul - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Aug - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Sep - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Oct - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Nov - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Dec - 2013          | \$0.00        | \$0.00        | \$0.00        |
| <b>Grand Total:</b> | <b>\$0.00</b> | <b>\$0.00</b> | <b>\$0.00</b> |

## Contractual Charges:

| Date                | Billable      | Non-Billable  | Total         |
|---------------------|---------------|---------------|---------------|
| Jan - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Feb - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Mar - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Apr - 2013          | \$0.00        | \$0.00        | \$0.00        |
| May - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Jun - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Jul - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Aug - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Sep - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Oct - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Nov - 2013          | \$0.00        | \$0.00        | \$0.00        |
| Dec - 2013          | \$0.00        | \$0.00        | \$0.00        |
| <b>Grand Total:</b> | <b>\$0.00</b> | <b>\$0.00</b> | <b>\$0.00</b> |



# Summary

- **Current Status and Achievements**

- Buy-in with both IT and Finance Department.
- Today we are using Smart Recharge to Capture Lexis and Pacer usage and import it directly into Elite.
- Using SmartRecharge for Pacer has saved almost two day per month of an accounts payable clerk's time.
- Recovery of Pacer use has more than paid for Research Monitor and SmartRecharge.
- Top Resources are configured for password management and usage tracking. Practical Law, Law360, DealPipeline, RIA Checkpoint, CCH Intelliconnect, HeinOnline, Fastcase, and Corporate Counsel.net.

- **Future Goals.**

- We are working on capturing Westlaw usage to follow the same process.
- We plan on turning on client validation for Lexis and Westlaw. The current process involves uploading a daily file. This will allow the process to be dynamic saving a daily step by the Financial Analyst.
- We need to add more of our databases to Research Monitor.

# Digital Resource Management using Research Monitor and SmartRecharge

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Director of Library Services

**Hughes Hubbard & Reed**

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For information on Research Monitor and  
SmartRecharge, visit <http://www.priorysolutions.com>

# Digital Resource Management using Onelog



Onelog - Main Menu

Manage Resources



Manage Web Control



Resource Configuration



Access Control Policies



Onelog Configuration



Reports



Onelog Connect

- [Trusted Sites - Important please read](#)
- [Pacer](#)
- [Compatibility with IE9 - 64 bit](#)
- [Bloomberg Law Website Changes](#)
- [Update to Chrome and Firefox extensions](#)
- [Westlaw Next update - 03 March 14](#)

# Client validation, including required comment

Add matter details [ Lexis (lexis.com) ]

**Add matter details**

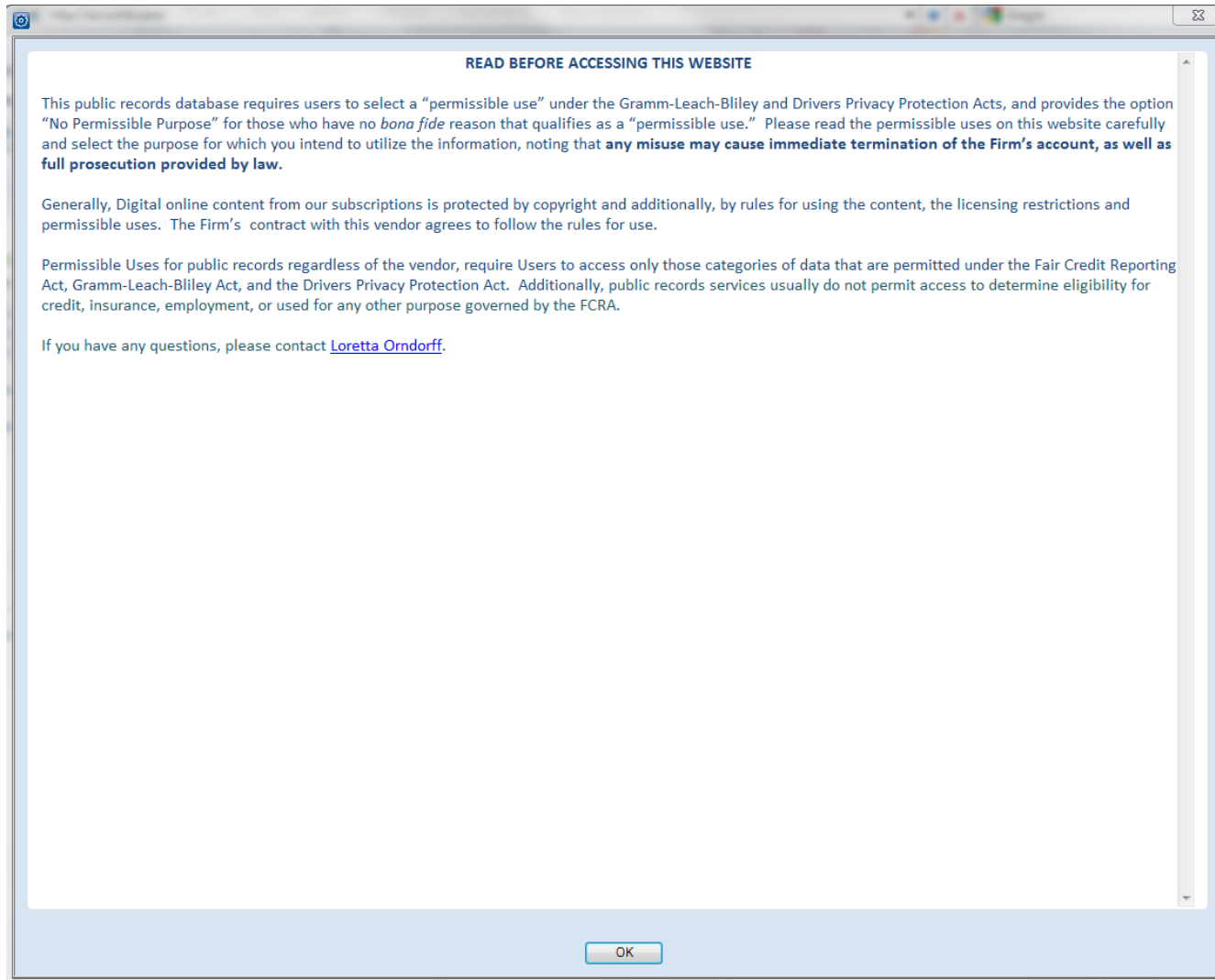
Matter number

Comment

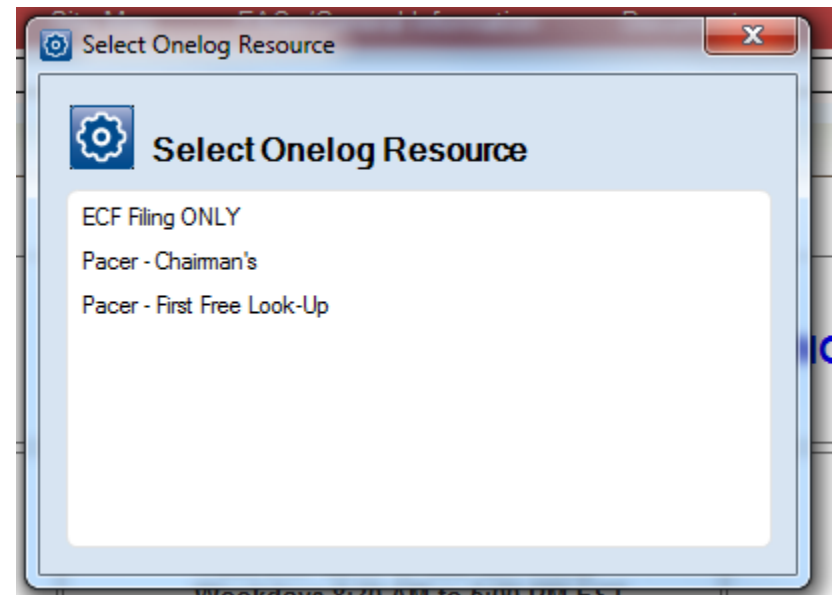
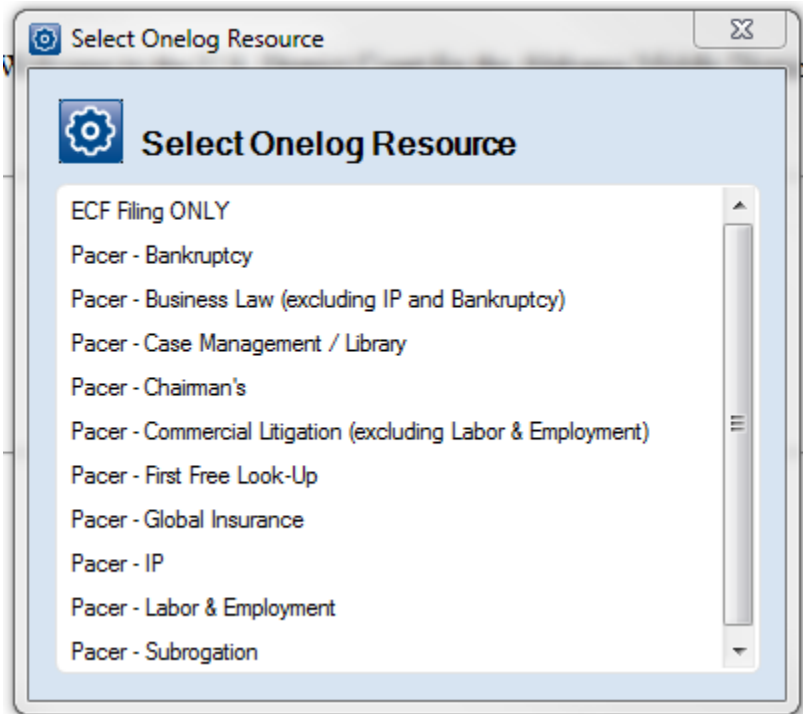
Comment needs to be at least 15 characters

OK

# Web Control – Permissible Uses Pop-Up



# Example of group access control. Library staff full access compared to Paralegal Access in Chairman's Department



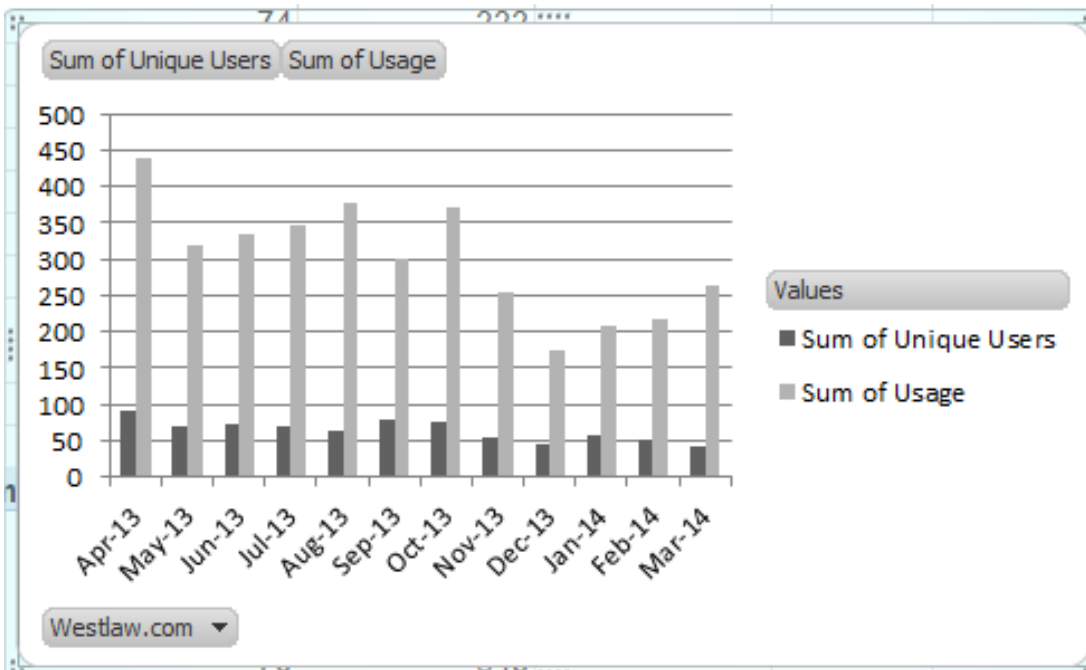
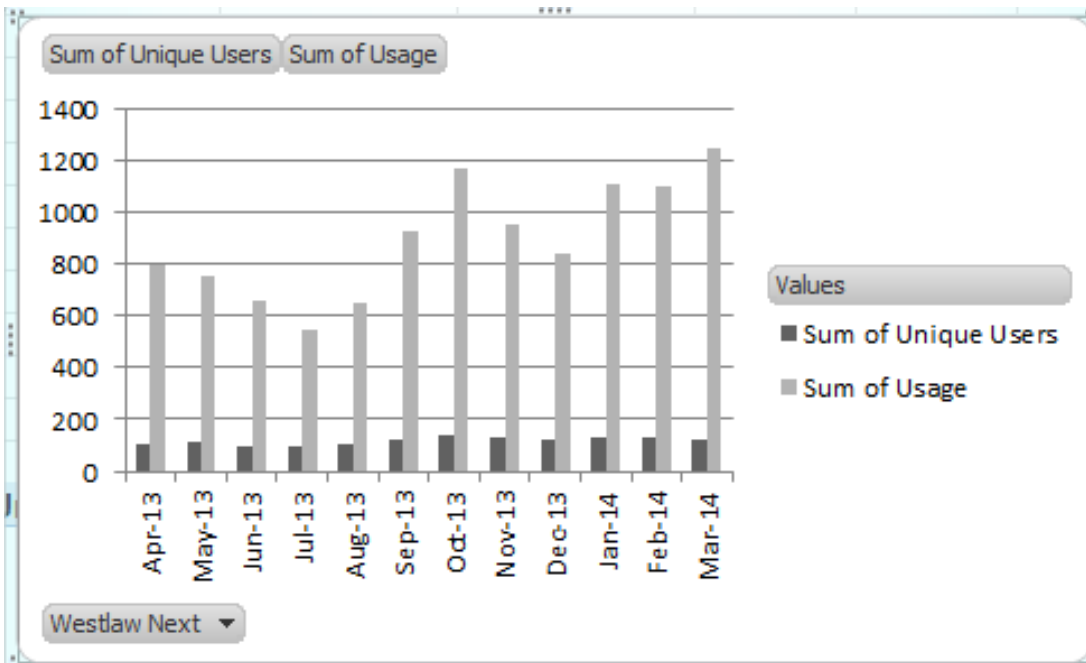
| All Usage   Resource - March 2014                                     | Unique Users | Usage |
|---|--------------|-------|
| A.M.Best (ambest.com)   | 24           | 90    |
| ABA/BNA Lawyers Manual on Professional Conduct                        | 3            | 12    |
| Accurint (accurint.com)   | 10           | 62    |
| American Lawyer (americanlawyer.com)                                  | 49           | 98    |
| Black's Law Dictionary  | 14           | 25    |
| Bloomberg Law   | 42           | 245   |
| BNA Benefits Practice Resource Center AND Pension & Benefits Reporter | 4            | 28    |
| BNA Criminal Law Reporter   | 4            | 5     |
| BNA Digital Discovery & E-Evidence Resource Center                    | 0            | 0     |
| BNA Health Care Daily Report & Health Law Reporter                    | 8            | 91    |
| BNA Labor & Employment Law Resource Center & Daily Labor Report       | 28           | 193   |
| BNA Privacy & Security Law Resource Center                            | 2            | 9     |
| BNA Tax & Accounting Center & Daily Tax Report & TM Material          | 26           | 111   |
| Business Insurance (businessinsurance.com)                            | 20           | 23    |
| CCHIntelliconnect   | 34           | 96    |
| Corporate Affiliations (LexisNexis)                                   | 16           | 115   |
| Courtlink (LexisNexis)  | 12           | 24    |
| Cozen Library Catalog   | 30           | 62    |
| CQ.com  | 8            | 35    |
| Delaware Business Court Insider                                       | 3            | 11    |
| Delaware Law Weekly (ALM)   | 3            | 17    |
| DNB   | 11           | 29    |
| Docket Navigator (docketnavigator.com)                                | 7            | 29    |
| Dun & Bradstreet US (dnb.com)   | 3            | 9     |
| E and E Publishing (eeneews.net)                                      | 6            | 47    |
| ECF Filing ONLY   | 205          | 1139  |
| Education Week (edweek.org)   | 2            | 2     |
| Fairplay (fairplay.co.uk)   | 5            | 7     |
| Family Tree Finder (DNB)  | 14           | 217   |
| FindLaw   | 156          | 249   |
| First Research  | 5            | 7     |
| Google Scholar  | 37           | 113   |
| Hoovers Online (hoovers.com)  | 36           | 89    |
| ICCES (courts.state.co.us)  | 12           | 252   |
| IDEX (LexisNexis)   | 5            | 8     |
| Infocon County Access (infoconcountyaccess.com)                       | 5            | 8     |
| Inside Health Policy (insidehealthpolicy.com)                         | 2            | 3     |
| IRMI Online (irmi-online.com)   | 23           | 53    |
| King County - ECR Online (kingcounty.gov)                             | 10           | 48    |
| Law360  | 196          | 474   |
| Law360 - Aerospace & Defense  | 1            | 2     |
| Law360 - Appellate  | 5            | 5     |
| Law360 - Banking  | 2            | 2     |
| Law360 - Bankruptcy   | 15           | 46    |
| Law360 - California   | 1            | 1     |
| Law360 - Class Action   | 6            | 8     |
| Law360 - Commercial Contracts   | 3            | 3     |
| Law360 - Competition Law  | 13           | 41    |
| Law360 - Consumer Protection  | 1            | 1     |
| Law360 - Corporate  | 8            | 27    |
| Law360 - Employment Law   | 26           | 325   |
| Law360 - Energy   | 22           | 78    |
| Law360 - Environmental  | 2            | 16    |
| Law360 - Florida  | 6            | 18    |

Monthly overview  
for Library Director.  
Formatted in Excel.



# Resource Report Detailed Usage, page 1 only

| Resource Usage Detail (Regular Use) |             |           |            |                               |          |               | Report Date Period |                     | 3/1/2014 12:00:00 AM - 3/31/2014 11:59:59 PM |                 |            |             |
|-------------------------------------|-------------|-----------|------------|-------------------------------|----------|---------------|--------------------|---------------------|--|-----------------|------------|-------------|
| Resource                            | Username    | Last Name | First Name | Group                         | IP Zones | Matter Number | Timekeeper ID      | Comment             | Date   | Duration        | Page Count | Cost        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 11:25:50 AM                         | 00:00:02        | 2          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 11:27:28 AM                         | 00:00:01        | 2          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 11:31:52 AM                         | 00:00:38        | 2          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 11:31:16 AM                         | 00:01:16        | 2          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 11:42:51 AM                         | 00:00:03        | 2          | 0.00        |
| Westlaw (westlaw.com) OnePass       | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 11:51:33 AM                         | 00:00:41        | 6          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | Testing with Onelog | 3/3/2014 12:16:57 PM                         | 00:13:00        | 8          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | doc retrieval       | 3/3/2014 12:31:31 PM                         | 00:00:02        | 4          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | doc retrieval       | 3/3/2014 12:32:03 PM                         | 01:33:16        | 19         | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing with onelog | 3/3/2014 3:03:12 PM                          | 00:00:02        | 4          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AShepherd   | Shepherd  | Angela     | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing onelog 123  | 3/3/2014 4:35:59 PM                          | 00:00:10        | 4          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 4:43:20 PM                          | 00:00:33        | 4          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 4:46:52 PM                          | 00:00:01        | 1          | 0.00        |
| Westlaw Next (next.westlaw.com)     | AdriaHarris | Harris    | Adria      | FRM ~ GRP-Library ~ Personnel |          | 099995.000    |                    | testing testing     | 3/3/2014 4:47:13 PM                          | 00:00:29        | 3          | 0.00        |
| <b>Report Totals</b>                |             |           |            |                               |          |               |                    |                     |  | <b>07:34:55</b> | <b>264</b> | <b>0.00</b> |



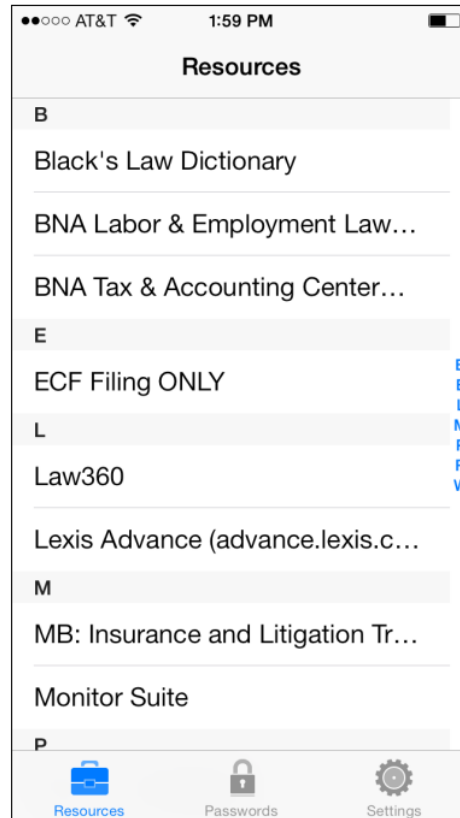


## Onelog - Contract Management

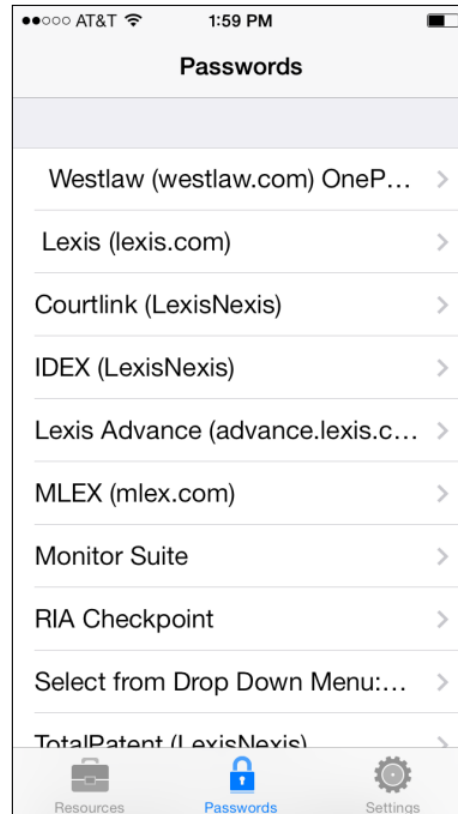
[+ New Contract](#)[Edit Contract Template](#)[Contracts](#)[Contract Group](#)[Expiry Date](#)

|   |           |    |
|---|-----------|----|
| LIBRARY: TLO  | 5/18/2014 | 17 |
| LIBRARY: RIA Checkpoint   | 5/31/2014 | 30 |
| LIBRARY: Lexis MYR and Addendum   | 5/31/2014 | 30 |
| LIBRARY: Pennsylvania Legislative Service                               | 6/15/2014 | 45 |
| LIBRARY: IRMI online - Comm'l Liab, Comm'l Prop Ins, Ins Law Essentials | 7/24/2014 | 84 |
| LIBRARY: Thompson - cancelled all                                       | 7/26/2014 | 86 |
| LIBRARY: LN Express Service TM Order Form                               | 7/31/2014 | 91 |
| LIBRARY: Lexis Password Admin Services Agreement                        | 7/31/2014 | 91 |
| LIBRARY: Courtlink 90 day termination or auto renew                     | 7/31/2014 | 91 |
| LIBRARY: Leadership Directories - cancel online and use print           | 7/31/2014 | 91 |
| LIBRARY: Westlaw Subscriber Agreement                                   | 7/31/2014 | 91 |

# Onelog Mobile Resources



# Onelog Mobile Passwords



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