



SharePoint: The Librarian's 21st Century Toolkit

Tuesday January 14, 2014

LLAGNY's Educational Conference

FINNEGAN



Fox Rothschild LLP
ATTORNEYS AT LAW

Agenda

- Introductions
- Learning Outcomes
- Questions for the Audience
- The Basics
- Practical demo
- Real Life Examples
- Q&A

Emily Florio & Finnegan

- Manager of Library Services
- 9 Library Staff Members

- Established in 1965
- Consistently ranked as one of the top US law firms for IP litigation, prosecution and counseling
- 350+ attorneys in 9 offices, with an additional 600 professionals and support staff

FINNEGAN

Jim Tuvell

- Director of Knowledge Services
- KM Department: 23 Staff (6 of which are Knowledge Services)
- About Fox:
 - Established in 1907
 - 550 attorneys
 - 22 Offices, over 50 Practices



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Learning Outcomes

- Difference between a Published Site and a Team Site
- How to create and edit SharePoint Sites
- Rights and permissions
- Web parts
- Lists and libraries
- Content types
- Basic vocabulary needed when working with SharePoint

Audience Questions

1. Who has access to SharePoint?

2. What version(s)?

2003

2007

2010

2013

3. Who manages SharePoint in your firm?

4. Do you know or use...

<p>
HTML
</p>

amazon.com



The Basics

- Portal vs. intranet
- Who manages SharePoint?
- What are the benefits to supporting or managing SharePoint?
- What can you do with SharePoint?



Practical Discussion

Levels of SharePoint Involvement

I am responsible for SharePoint in my organization.



You are positioned to provide tremendous value. *(and may regularly bang your head against a wall)*



I have a site and want to do more



We'll give you some tips and inspiration today.



I'm not involved with SharePoint



Request a site to learn more about it.



I don't have SharePoint

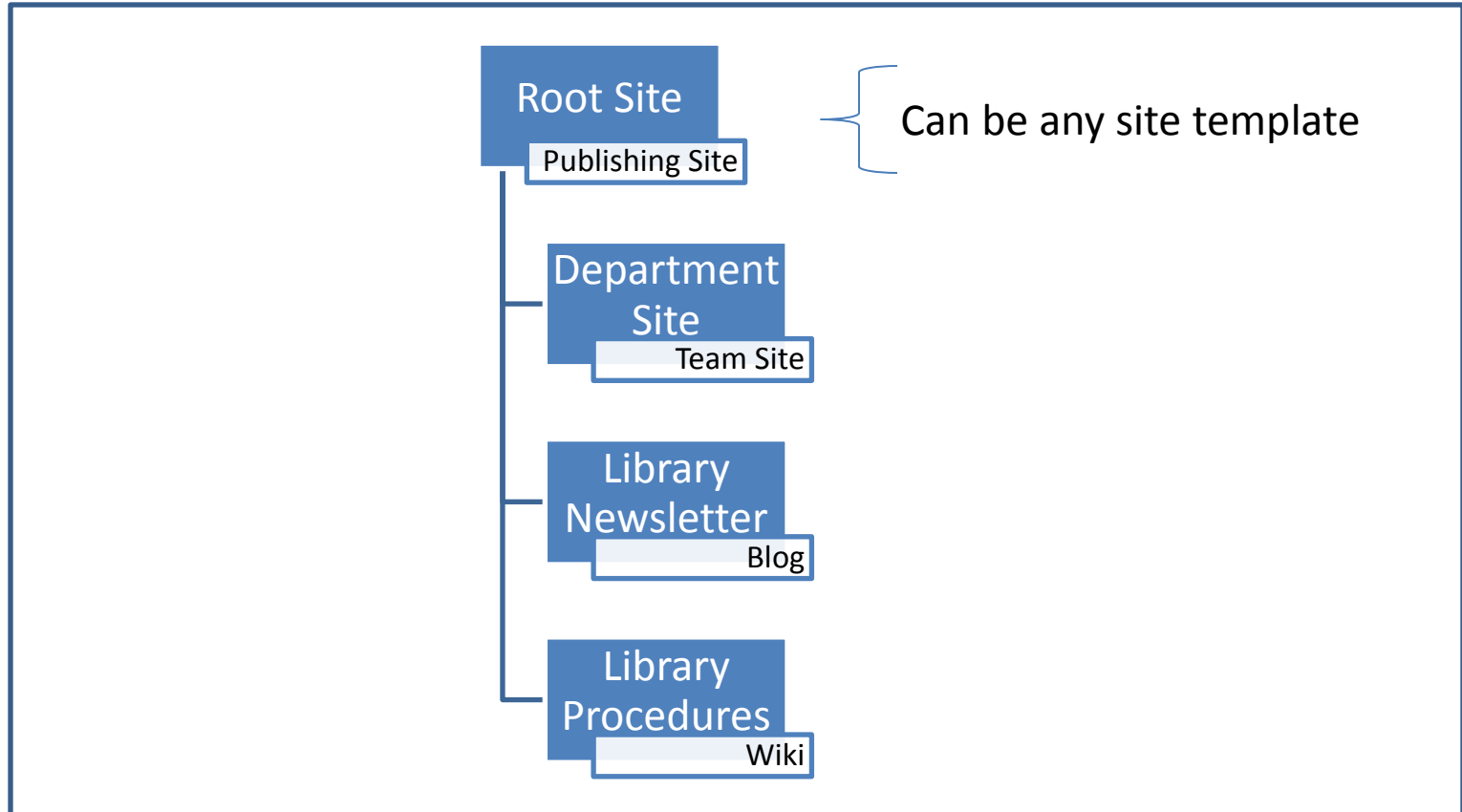


SharePoint Foundation is free with Windows Servers.



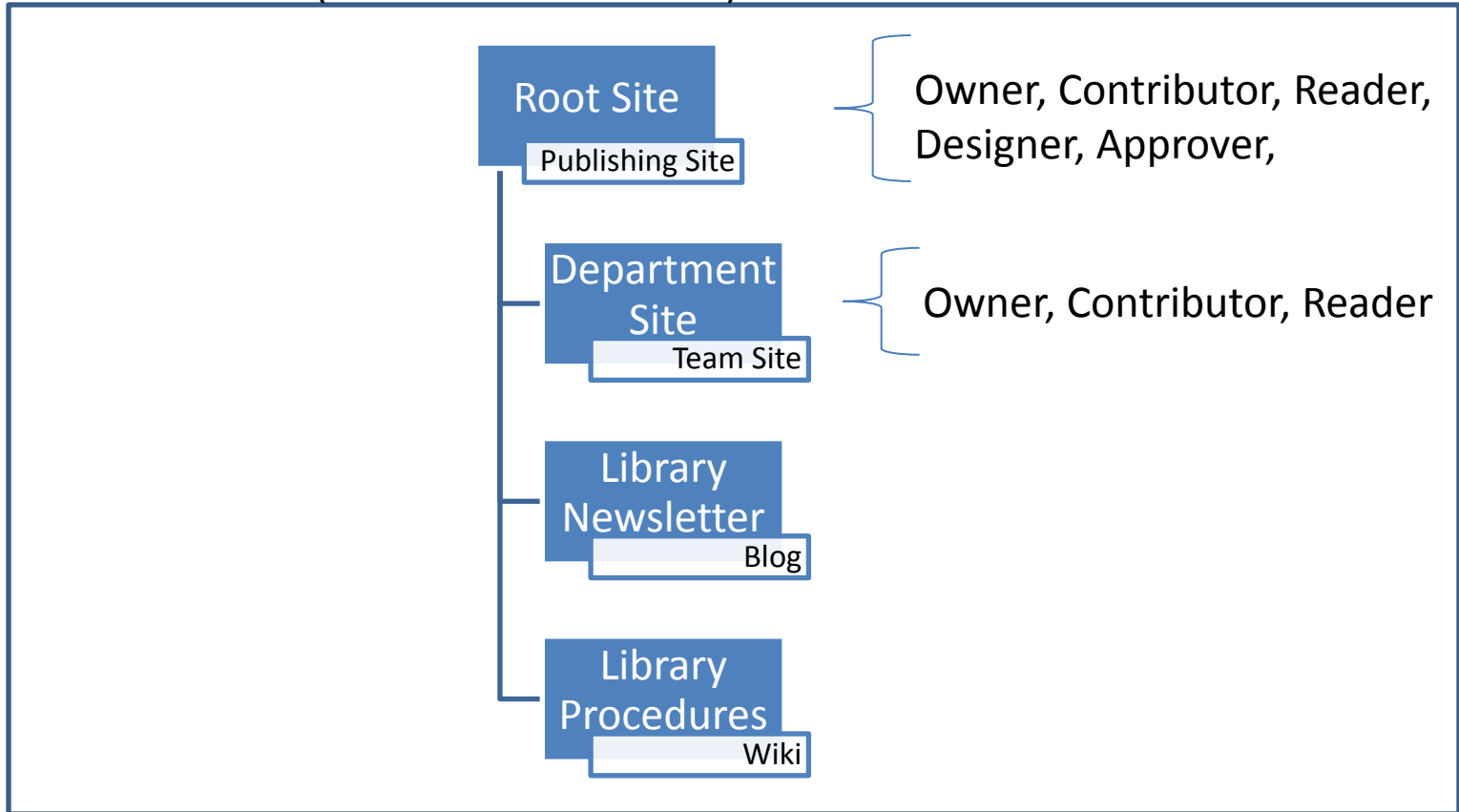
Site Collection vs. Sites

Site Collection

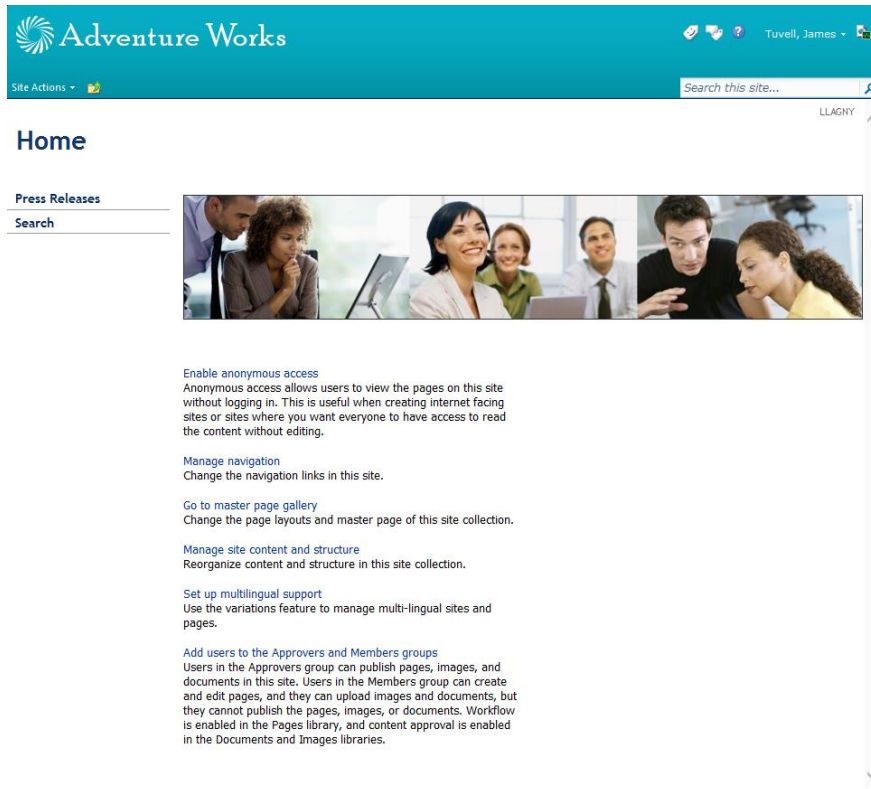


Permissions

Site Collection (Site Collection Admin)

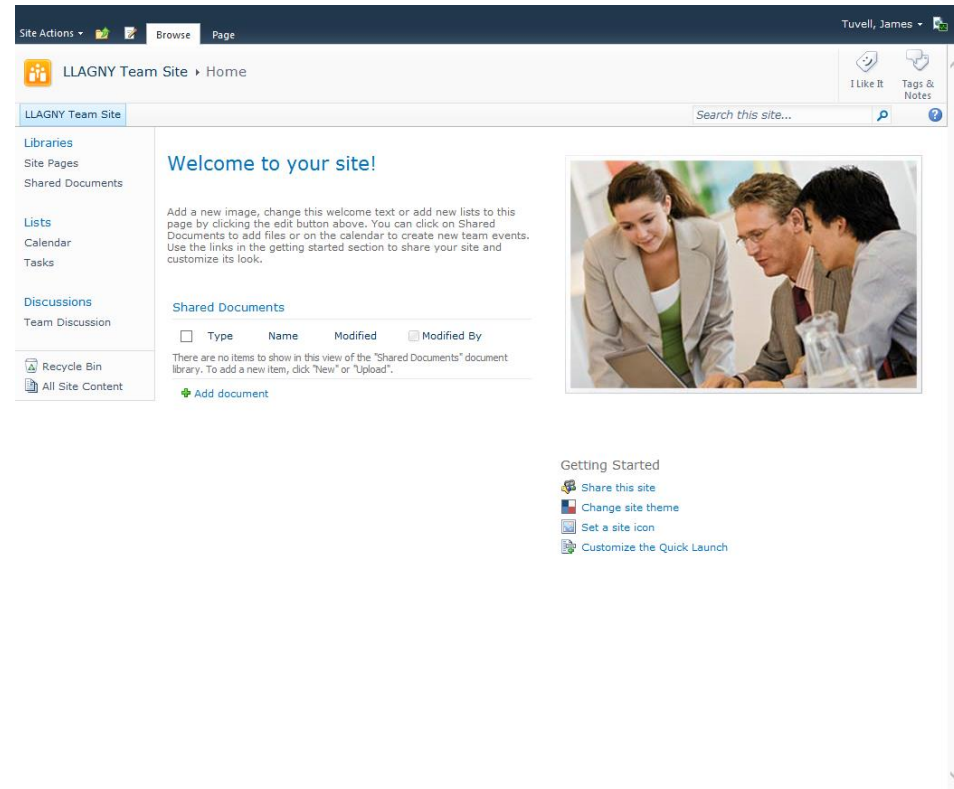


Publishing vs. Team Site



The screenshot shows the Adventure Works Publishing site interface. The top navigation bar is teal with the Adventure Works logo on the left and user information 'Tuvell, James' on the right. Below the navigation bar is a search box and a 'Home' section. The main content area features a large image of a diverse group of business professionals in a meeting. Below the image are several informational links:

- Enable anonymous access**: Anonymous access allows users to view the pages on this site without logging in. This is useful when creating internet facing sites or sites where you want everyone to have access to read the content without editing.
- Manage navigation**: Change the navigation links in this site.
- Go to master page gallery**: Change the page layouts and master page of this site collection.
- Manage site content and structure**: Reorganize content and structure in this site collection.
- Set up multilingual support**: Use the variations feature to manage multi-lingual sites and pages.
- Add users to the Approvers and Members groups**: Users in the Approvers group can publish pages, images, and documents in this site. Users in the Members group can create and edit pages, and they can upload images and documents, but they cannot publish the pages, images, or documents. Workflow is enabled in the Pages library, and content approval is enabled in the Documents and Images libraries.



The screenshot shows the LLAGNY Team Site interface. The top navigation bar is dark blue with 'Site Actions' and 'Browse Page' on the left, and user information 'Tuvell, James' on the right. Below the navigation bar is a search box and a 'Home' section. The main content area features a large image of three business professionals in a meeting. Below the image are several informational links:

- Libraries**: Site Pages, Shared Documents
- Lists**: Calendar, Tasks
- Discussions**: Team Discussion
- Recycle Bin**: All Site Content

Welcome to your site!

Add a new image, change this welcome text or add new lists to this page by clicking the edit button above. You can click on Shared Documents to add files or on the calendar to create new team events. Use the links in the getting started section to share your site and customize its look.

Shared Documents

Type	Name	Modified	Modified By
There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".			

[Add document](#)

Getting Started

- [Share this site](#)
- [Change site theme](#)
- [Set a site icon](#)
- [Customize the Quick Launch](#)

Publishing vs. Team Site

The screenshot shows the Adventure Works SharePoint site in Edit mode. The top navigation bar includes 'Site Actions', 'Browse', 'Page', and 'Publish'. The 'Page' ribbon is active, showing options like 'Page History', 'Page Permissions', 'E-mail a Link', 'Alert Me', 'Preview', 'Page Layout', 'Draft Check', 'Make Homepage', 'Incoming Links', 'Library Settings', 'Library Permissions', and 'View All Pages'. The main content area is titled 'Manage navigation' and contains several links: 'Go to master page gallery', 'Manage site content and structure', 'Set up multilingual support', and 'Add users to the Approvers and Members groups'. Below this, there are three zones: 'Top', 'Bottom Left Zone', and 'Bottom Right Zone', each containing an 'Add a Web Part' button. A 'Press Releases' section is also visible, stating 'This query has returned no items. To configure the query for this Web Part, open the tool pane.'

The screenshot shows the Adventure Works SharePoint site in Publish mode. The top navigation bar includes 'Site Actions', 'Browse', 'Page', and 'Publish'. The 'Publish' ribbon is active, showing options like 'Save & Close', 'Check Out', 'Paste', 'Undo', 'Cut', 'Copy', 'Format Text', and 'Insert'. The main content area is titled 'Welcome to your site!' and contains a 'Shared Documents' section. The 'Shared Documents' section is empty, with a message: 'There are no items to show in this view of the "Shared Documents" document library. To add a new item, click "New" or "Upload".' Below this, there is an 'Add document' button. To the right, there is a 'Getting Started' section with links: 'Share this site', 'Change site theme', 'Set a site icon', and 'Customize the Quick Launch'. A large image of three people looking at a laptop is also visible.

Demo Scenario: Library Team Site

- Store Contracts
- Simple Catalog
- Time Off Calendar
- Task list for non-research projects
- Links to internet resources
- Create a Library Blog for lessons learned



Library Services


 EDIT LINKS

Search this site



Master List of Subscriptions & Services

Home

 new item or edit this list

Documents

All Items



Find an item



Calendar

Recent

Master List of
Subscriptions &
Services

Site Contents

 EDIT LINKS

✓	Resource	URL	Staff Member/Attorney	User ID	Password	Chargeback Info	Vendor Contact
	Accurint	... http://www.accurint.com/				Transactional charges are passed through for usage under billable client-matter numbers. OE usage billed to Firm (Online Other-65880.01; Disb. Code 76)	Blair Morgen, Accurint Product Specialist blair.morgen@lexisnexis.com 609-387-5069 direct Ellie Littau, Collections Rep O: 678-694-5799 F: 877-895-2051 ellie.littau@lexisnexis.com
	ABA	... http://www.americanbar.org/aba.html					
	ALM Legal Intelligence	... http://www.almlegalintel.com/				N/A - Firm has Flat-Rate Contract and does not charge back for this resource.	Deborah Cook (*current primary contact) dcook@alm.com 717-870-1688 Phil Flora (backup contact) pflora@alm.com 917-453-5548 212-457-7767

- View All Site Content
- Useful Research Documents
 - Downloaded Patents
 - Library Wiki
 - Library Handouts

- Lists
 - Calendar
 - Tasks
- People and C...
- Discussions
 - Team Discus...
- Sites
 - Recycle B...

Home > Departments > Library Services

Search the Online Catalog: FIRST!



Library Information Resources

- Guide to Library Databases
- A-Z List of Electronic Titles
- Guide to Library Dictionaries
- Legal News & Court Alerts

Library Staff & Services

- Contact the Library!
- Library Services Overview

Westlaw Find & Print



Do NOT use for USPQ citations
Enter Case Citations:
(Separated by semi-colons):

Content:

- Full Text Documents
 - Substitute with Reporter Images when available.
 - Create one PDF for all Reporter Images
 - KeyCite Citing References
 - KeyCite History
 - Exclude court documents from KeyCite History
 - KeyCite Negative Treatment Only

- Attached Printer: PDF HTML
- Download:
- E-Mail:
-
- Send all documents in one email

Find Clear

Patent Referrals Site (includes CIPA services, local counsel, etc.)
Add new link

Patent Resources

- Patent Sources & Sites:
- Patent Reform/AIA Resources
 - Patent Treatises
 - Lexis PatentOptimizer
 - Design Patent Resources
 - Patent Search Tools
 - Patent Information Services (File Histories, Bulk Patent Orders, Custom Orders, etc.)
 - Patent Decisions
 - Patent Portal Sites
 - USPTO Patent Attorney/Agent List
 - Patent Maintenance Fees
 - Patent Kind Codes
 - Rules & Regs (CFR, USC, MPEP)
 - Patent Treaties
 - Patent Statistics & Studies
 - Patent Law Research Guides
 - Patent Blogs

Trademark Resources

- Trademark Source & Sites:
- Trademark Treatises
 - Trademark Decisions
 - IP Surveys
 - Trademark Current Awareness Titles
 - Trademark Manuals

CAFC Opinions and Orders

- Opinions & Orders
- BELL/HEERY v. US [OPINION]
 - Appeal Number: 13-5002
 - More...
 - DEOCAMPO v. ARMY [OPINION]
 - Appeal Number: 13-3090
 - More...
 - HTC CORPORATION v. IPCOM GMBH & CO., KG [RULE 36 JUDGMENT]
 - Appeal Number: 12-1659
 - More...

- 1/14/2014 1:30 PM Westlaw Training/Research Assistance - DC Library
 - 1/16/2014 10:30 AM Lexis Training/Research Assistance - DC Library
 - 1/21/2014 1:30 PM Westlaw Training/Research Assistance - DC Library
 - 1/23/2014 10:30 AM Lexis Training/Research Assistance - DC Library
- (More Events...)
- Add new event

The TTABlog®

Precedential No. 44: Respondent Consents to Judgment on Abandonment Claim, TTAB Declines to Consider Fraud Claim

Precedential No. 43: TTAB Affirms Section 2(a) False Connection Refusal of "LAKOTA" for Herbal Remedies

Test Your TTAB Judge-Ability: Is "no \$#!+" Scandalous for an Entertainment Website?

TTAB Posts January 2014 Hearing Schedule

Bill Introduced in Congress to Allow Registration of Governmental Insignia

Guide to Library Databases

**If you do not see a desired database listed below, please send an inquiry to All-Library. We may have transactional or limited-user access to the database in question, and can always inquire with the vendor if we do not. Please contact All-Library to request training or any other database assistance.*

<u>Database Name and Hyperlink</u>	<u>Format for Client Matter Entry</u>	<u>Database Info/Training Tips</u>	<u>Pass-Through Charges Information</u>	<u>Login & Help Contact Information</u>
Case Law				
<u>Lexis</u>	00000-0000-00000/0000 (the last 4 digits are your atty#)	<p>Cases</p> <p><u>Cost-Effective Tips</u></p>	<p><i>*Please Note that all charges are included in FH Lexis contract UNLESS you pass through a warning screen. The information below is to provide guidance re: client billing only.</i></p> <p>Varies depending on # of searches and content searched. See <u>here</u> for more details.</p>	<p>Contact All-Library to request/look up individual ID and Password, or to request Library conduct search</p> <p>If after business hours, call Lexis at 1-800-543-6862</p>
<u>WestlawNext</u>	00000-0000-00000/0000 (the last 4 digits are your atty#)	<p><u>Cost-Effective Tips</u></p> <p>Introductory WebEx on Cost-Effective Use of WestlawNext (Includes instruction on Simplified pricing structure for client bill-back purposes):</p> <p><u>Streaming Recording Link</u></p> <p><u>Download Recording Link</u></p>	<p><i>*Please Note that all charges are included in FH Westlaw contract UNLESS you pass through a warning screen. The information below is to provide guidance re: client billing only.</i></p> <p>See <u>here</u> for WNext Simplified Pricing Structure</p>	<p>Contact All-Library to request/look up individual ID and Password, or to request Library conduct search</p> <p>If after Library business hours, call Westlaw at 1-800-937-8529 for Technical Support, and 1-888-937-7539 or 1-800-733-2889 to speak with a Westlaw Reference Attorney</p>
<u>Westlaw</u>	00000-0000-00000/0000 (the last 4 digits are your atty#)	<p>Cases</p> <p><u>Cost-Effective Tips</u></p>	<p><i>*Please Note that all charges are included in FH Westlaw contract UNLESS you pass through a warning screen. The information below is to provide guidance re: client billing only.</i></p> <p>Varies depending on # of searches and content searched. See <u>here</u> for more details.</p>	<p>Contact All-Library to request/look up individual ID and Password, or to request Library conduct search</p> <p>If after Library business hours, call Westlaw at 1-800-937-8529 for Technical Support, and 1-888-937-7539 or 1-800-733-2889 to speak with a Westlaw Reference Attorney</p>



Westlaw account representatives

[View All Site Content](#)

Documents

- [Shared Documents](#)
- [Internal Library Wiki](#)

Lists

- [Calendar](#)
- [Tasks](#)
- [Current Awareness Alerts Monitored by Library Staff](#)
- [Master List of Library Subscriptions & Services](#)

Discussions

- [Team Discussion](#)

Sites

People and Groups

[Recycle Bin](#)

Recent Changes

- [Staff Members' Daily Schedules](#)
- [Register Users for Thomson Innovation Pro](#)
- [Visa and AmEx Procedure](#)
- [IP authenticating library resources](#)
- [Initial Response to Requester for All-Library Requests](#)

[View All Pages](#)

As of 10/7/2013:

Palo Alto

Wallace, Barry

barry.wallace@thomsonreuters.com

Boston

Wilson, Beth A.

beth.wilson@thomsonreuters.com

worked with Christine Brennan to schedule trainings

Reston

Koppelman, Andrea

andrea.koppelman@thomsonreuters.com

Atlanta

Beck, Erika

erika.beck@thomsonreuters.com

worked with Megan Reynolds to schedule training

Last modified at 10/7/2013 1:55 PM by Florio, Emily

Monitoring

Library Services Tasks - Windows Internet Explorer

http://foxshweb1.65000/SiteDirectory/KnowledgeManagement/librarianservices/Lists/Library%20Services%20Tasks/active.aspx?ShowInGrid=True&View=%7B14410174%2DDEEB%2D4E8E%2D4A26%2D9D322E13752A%7D

File Edit View Favorites Tools Help

Open in pdfDocs Desktop

Favorites Google Home - Collection Devel... Home - Knowledge Mana... Home - Library Services Home - Technical Services Home - Training and Dev... Rightsphere RightsphereSearch Sign In - EOS Suggested Sites Web Slice Gallery West km Customize Links

Library Services Tasks

Welcome Conway, Misti

fox|net Library Services

Library Services Research Services Collection Development Technical Services Training and Development

All Sites Advanced Search Site Actions

Library Services > Library Services Tasks

Library Services Tasks

View All Site Content

Discussions Documents Lists Library Services Tasks People and Groups Research Services Sites Collection Development Technical Services Training and Development Recycle Bin

New Actions Settings View: Active Tasks

Priority	Team	Project	Title	Assigned To	Handled by	Description	Comments / Notes	Task Status	Due Date
(2) Normal	Collection Development	License Review	SM_End User Agreement.doc (for license review)	Conway, Misti	Conway, Misti	New Document	Given to Tris 5/21/2012. Below Docket Navigator in priority. Per CMM waiting to figure out Law360 before passing on the Tris.	Active	
(2) Normal	Collection Development	Collection Development Engagement	Bloomberg Trial	Conway, Misti	Conway, Misti	Review Memos from Grace		Active	
(2) Normal	Collection Development	Collection Development Engagement	Intelligize Trial	Conway, Misti	Conway, Misti	Review memo from Val		Active	
(2) Normal	Collection Development	Collection Development Engagement	HR Mgmt Library	Conway, Misti	Conway, Misti	Do we want to replace the discontinued print with this	Update on Team Site no response from Jim/Stan	Active	
(2) Normal	Collection Development	Collection Development Engagement	Thomson Reuters on Demand	Conway, Misti	Conway, Misti	Is this worth exploring?		Active	
(2) Normal	Collection Development	Collection Development Engagement	Lexis Nexis Bankruptcy Product	Conway, Misti	Conway, Misti	New product from MM	MLC attended demo 6/6/2012	Active	
(3) Low	Collection Development	Collection Development Engagement	Bloomberg Law Billback posting	Conway, Misti		From: privatelawlib-bounces@lists.washlaw.edu Hello, I was wondering if anyone was cost recovering for Bloomberg Law? I'd be very interested in hearing about how you've set it up and how it is working out. Thank you. Sarah S. Bennett	see if there are any responses	Active	
(3) Low	Collection Development	Library Services Engagement	Attorney Practice Group Software Meeting with IS .pdf	Conway, Misti	Conway, Misti	In the next month or so will probably start to get more actively involved with IS is a general software review.		Active	
(3) Low	Collection Development	Library Services Engagement	PH1-#2810110-v1-Software_Inventory_for_M_Morris.XLS	Conway, Misti	Conway, Misti	For involvement with IS Software review		Active	
(3) Low	Collection Development	Collection Development Engagement	Reivew Nationwide Research Memo	Conway, Misti	Conway, Misti	For a C-Dev project	Item is already in the budget for FY 2012-2013	Active	
(1) High	KM Mgmt		Stats Projects	Conway, Misti	Conway, Misti	Insert items from MLC and CMM Notes		Not Started	
(0) Critical	KM Mgmt	Collection Development Engagement	J. Miravich - Budget - PA Law Library	Conway, Misti	Conway, Misti	Business case	no reponse after informing of KM price	Active	
(1) High	KM Mgmt	Orientation Engagement	Attorney Skills Review	Conway, Misti	Conway, Misti	Review and discuss	Sorry- I thought this was cancelled	Active	
(1) High	KM Mgmt	Training Engagement	Priority Research Path	Conway, Misti	Tuvell, James	Do we get this as part of an upgrade? An enhancement?	Per JT - we could purchase, but this is what we opted not to participate in... CMM emailed JT 5/25/12	Active	
(1) High	KM Mgmt	2012 Partner Retreat Follow-ups	D. Haire - "Risk Report"	Conway, Misti	Conway, Misti	Obtain copy to determine if we can replicate.		Not Started	
(1) High	KM Mgmt	2012 Partner Retreat Follow-ups	11 Innovation - Top 50 client monitoring	Conway, Misti	Conway, Misti	Are we monitoring for them.		Not Started	

For assistance with Access Web Datasheet, see [Help](#).

Local intranet | Protected Mode: Off 100%

Replace Many Excel Spreadsheets

The screenshot displays a web browser window with the address bar showing a URL from foxshweb1. The page content is organized into several sections:

- Announcements:** A section with a heading and a sub-heading, containing a message about active announcements and a link to add a new one.
- Major Projects and Non-Research Tasks:** A section with a heading and a sub-heading, containing a table with columns for Title, Task Status, Priority, Due Date, and % Complete. A message below the table indicates no items are currently shown.
- Inter-Library Loans:** A section with a heading and a sub-heading, containing a table with columns for Due Date, Renewed, Returned, Loan Type, Title, Lending Library, and Loan Status. The table lists various loan records.
- My Assigned Issues:** A section with a heading and a sub-heading, containing a table with columns for Issue ID, Title, Issue Status, Priority, and Due Date. A message below the table indicates no items are currently shown.
- Checklists:** A section with a heading and a sub-heading, containing a table with columns for Type and Name.
- Links:** A section with a heading and a sub-heading, containing a list of links with titles such as "Topic: Corporate", "Topic: General", and "Topic: Intellectual Property".
- Contacts:** A section with a heading and a sub-heading, containing a table with columns for Last Name, First Name, and Company.

The browser interface includes a menu bar (File, Edit, View, Favorites, Tools, Help), a search bar, and a navigation pane on the left side with categories like Documents, Lists, Discussions, Sites, and People and Groups.

Replaced Extremely Wide Spreadsheet

fox|net **Collection Development**

All Sites

Library Services **Collection Development** Technical Services Training and Development

View All Site Content

Documents

Lists

- Collection Development Projects
- Collection Development Tasks
- Corporate Securities Comparison

Discussions

Sites

People and Groups

Recycle Bin

Library Services > Collection Development

Team site to coordinate collection development

Collection Development Projects

Title	Status	Priority	Priority Order	Date Added
Lexis Case Pull Alternatives	Completed	(0) Critical	1	4/1/2011
Westlaw Next	Completed	(1) High	x	8/29/2010
PLC - Corporate and Securities	Completed	(1) High	x	1/1/2011
Alternative News Resources	Active	(2) Normal	x	6/6/2011
Ⓢ Bloomberg	Active	(1) High	x	6/30/2011
Dialog	Active	(1) High	2	10/1/2011
Jenkins Law Library	Active	(1) High	x	10/1/2011
NYLI	Active	(1) High	x	1/1/2011
FastCase	Deferred	(1) High	x	1/1/2011
Mobile Apps for Law	Active	(1) High	x	6/15/2011
Accellis	Completed	(1) High	x	1/1/2011
CEB Publications	Not Started	(3) Low	x	1/1/2011
Manzama	Active	(2) Normal	x	1/1/2011
Ⓢ Smart Litigator	Completed	(1) High	0	1/6/2012
Labor Relations Partners	Deferred	(2) Normal	x	2/8/2012
Intellegize	Active	(1) High	1	2/8/2012
Hein OnLine Additional Content	Deferred	(1) High	x	4/1/2012
PA-PUC Resource	Active	(2) Normal	x	4/1/2012
BNA International Tax Resource	Not Started	(3) Low	x	3/1/2012
CCH Items no longer being published in print	Completed	(0) Critical	x	4/1/2012
Westlaw Content Review	Not Started	(2) Normal	x	1/1/2012
Federal Banking Law Reporter Electronically	Not Started	(2) Normal	x	4/1/2012
Jones McClure Print Titles	Not Started	(2) Normal	x	1/1/2011
BNA IP Library	Completed	(2) Normal	x	4/1/2012
Jenkins on Portal	Not Started	(3) Low	x	1/1/2012
Canadian Business Directory	Not Started	(2) Normal	x	3/1/2012
Morning Star	Active	(1) High	x	4/1/2012
ALM Site Wide License	Deferred	(1) High	x	4/1/2012

Collection Development Tasks

Title	Task Status	Priority	Due Date	% Complete
There are no items to show in this view of the "Collection Development Tasks" list. To create a new item, click "New" above.				

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Questions?

