Faculty Research Assistant Training

Jane Thompson, Faculty Services
William A. Wise Law Library
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Introduction: Where to Get Help

- Research Assistant Services:
  - Jane Thompson, faculty services librarian
    jane.thompson@colorado.edu

- General Reference Services:
  - Law Library: http://lawlibrary.colorado.edu/help/ask-librarian
  - Other campus libraries:
    https://www.colorado.edu/libraries/ask-librarian
RA Training Materials Page

- [http://lawlibrary.colorado.edu/research-assistant-resources](http://lawlibrary.colorado.edu/research-assistant-resources)
  - RA Training powerpoint and videos of vendor presentations
  - Major Legal Treatises and Sources by Topic & Colorado Practice Materials
  - Sample research plan and research log; example of search term brainstorming
  - Norlin Library proxy letter and tour
**RA Protocols: Printing**

- **Getting paid** (payroll contact & employment packets):
  - Victoria Johnson, Finance & Accounting Coordinator, victoria.a.johnson@colorado.edu; office 326T, 3rd floor; phone: 303-492-0525

- **Making photocopies or printing** computer-based documents:
  - Regular jobs: 3 RA printing cards at Circulation Desk
  - Large jobs: Copy documents to a flash drive and give to Jane’s assistant (Matt Zafiratos) to print on the Faculty printers; send advance notice (24 hrs. preferred) to matthew.zafiratos@colorado.edu
RA Protocols: Print Cards at Circ
**RA Protocols: Check-outs**

- **Checking out books** under Prof’s name:
  - Law Library: RA borrower record for Professor at circ desk
    - Law Library: RA borrower record for Professor at circ desk

  ![RA borrower record](image1.png)

- **UCB Libraries: Proxy letter from Professor** (form for Norlin Library circ):
  - [https://lawlibrary.colorado.edu/sites/default/files/images/norlinletter.pdf](https://lawlibrary.colorado.edu/sites/default/files/images/norlinletter.pdf)
RA Protocols: Requesting Books

- **Requesting books from the Law Library** for pick-up at the Circulation Desk:
  [http://lawlibrary.colorado.edu/students/request-it-law-library-books-waiting-you-circulation-desk](http://lawlibrary.colorado.edu/students/request-it-law-library-books-waiting-you-circulation-desk)

- **Requesting books through interlibrary loan** from Colorado or out of state libraries:
  [http://lawlibrary.colorado.edu/interlibrary-loan-ill-borrowing](http://lawlibrary.colorado.edu/interlibrary-loan-ill-borrowing)
  Prospector [~one week to arrive] and FirstSearch WorldCat [~two weeks to arrive]
Accessing library databases from home

- Westlaw, Lexis, Bloomberg: personal pwd
- Others: Proxy server prompt for CU ID
- A few work only by launching Cisco AnyConnect VPN software first and logging in with your CU ID:
  - [https://oit.colorado.edu/services/network-internet-services/vpn](https://oit.colorado.edu/services/network-internet-services/vpn)
Westlaw summer password extension—register by 5/31/19 and choose “project for a professor”:
https://lawschool.westlaw.com/registration/SummerExtension.aspx

Lexis Advance and Bloomberg Law—no summer password extension needed; passwords may be used for academic, non-profit or commercial work
How do I print documents from my laptop without paying for the printing?

How do I check out books from the law library and campus libraries under my professor’s accounts?

How do I access library databases from home?

Do I need to extend my Westlaw ID?
How to be a good RA (Jane’s tips)

- Clarify the **scope and jurisdiction** of the research project
- Clarify **how long to work** on the project and **when** any work product is due
- **Check in** regularly to report findings
- Ask questions about the **substance, style, and formatting** of any research results to be submitted to your professor
Research Process

- **Step 1**: Formulate and clarify the research problem
- **Step 2**: Break down the problem into discrete issues to be researched (research plan)
- **Step 3**: Identify search terms and connectors for each issue, identify preliminary sources, and engage in research
- **Step 4**: Start and maintain a research log
Research Process (cont’d)

- **Step 5**: Capture information and organize it for later retrieval
- **Step 6**: Update your research
- **Step 7**: Know when to stop research
Research Process: Step 1

**Step 1: Formulate and clarify the research problem**, and refine it:

- Ask initial questions of the professor
- Conduct some background research and make a list of additional questions to ask
- Refine your statement of the problem as you take in new information
- [Research Plan form](#) on RA Training Materials page
Step 2: Break down the problem into discrete research issues and list each one.
Step 3: For each research issue:

- Brainstorm search terms and relationships between them (connectors)
  - [https://nocalltechnology.files.wordpress.com/2012/05/2009sihandy.pdf](https://nocalltechnology.files.wordpress.com/2012/05/2009sihandy.pdf) (form)

- Identify preliminary sources for research, tailoring your choice of sources to the issue

- Conduct searches and engage in research, paying attention to references to related material in footnotes and “further reading”
Step 3: Identify sources to search:

- Locate **key legal treatises** and encyclopedias:
  - Consult “Major Legal Treatises and Sources by Topic”: http://coloradolaw.libguides.com/c.php?g=844156
  - Other Wise Law Library Research Guides: http://coloradolaw.libguides.com/
  - For Colorado research: Consult “Colorado Practice Materials Resource Checklist” on RA Training page

- Search “Big 5” Library Catalogs at http://lawlibrary.colorado.edu:
  - Lawpac (local) and books/articles (“Search Full Text Articles & More” box)
  - Chinook (campus)
  - Prospector (regional)
  - FirstSearch WorldCat (national)
  - Google Books -- http://books.google.com/
Cases Search Tip: Redundancy is important – [Mart 2015 study]
Cases Search Tip:
When you Keycite, Shepardize, or BCite a case that has negative treatment, the results you get depend mainly on which citator you happen to choose.

Research Process: Step 3 (cont’d)

- **Step 3: Identify sources to search** (cont’d):
  - **Google Search Tips:**
    - Use multiple words; word order **matters**
    - Use OR for alternative terms/synonyms
    - Use quotes to get exact results (“clean air act”)
    - Search a phrase in quotes with an asterisk replacing a word to find all variations (“* is thicker than water”)
    - Use minus sign to exclude terms (jaguar –car)
    - Use site: search for domains/websites (site:.gov)
    - Use define: for definitions (define:biomass)
    - Use Google Advanced Search
      [https://www.google.com/advanced_search](https://www.google.com/advanced_search)
Step 3: Identify sources to search (cont’d):

  - Tip: Use the box marked “Search Full Text Articles & More” at [http://lawlibrary.colorado.edu](http://lawlibrary.colorado.edu) to search interdisciplinary article databases AND books in one search

- Identify and search relevant specialty databases:
  - **ProQuest Legislative Insight** and **ProQuest Congressional** (federal legislative history)
  - **ProQuest Regulatory Insight** (federal regulatory history)
  - **Bloomberg Law News, Law360, and Law.com** - reporting judicial, regulatory, legislative developments on a daily, weekly or biweekly basis
Step 3: Identify sources to search (cont’d):

- Use *journal finders* to locate electronic articles:
  - Law Library Journal Search (by Title):
    [http://lawlibrary.colorado.edu/](http://lawlibrary.colorado.edu/) (1st box)
  - Chinook E-journal Finder:
    [http://www.colorado.edu/libraries/research-assistance/research-strategies](http://www.colorado.edu/libraries/research-assistance/research-strategies) (E-Journals link)
  - Chinook Classic **title** search for print journals:
    [http://libraries.colorado.edu/](http://libraries.colorado.edu/)
● Do I have a research plan?
● How do I find good treatises on my topic?
● Where can I search for books that aren’t in the Law Library?
● Do I need to search cases in both WL & LX?
● How do I limit my Google search to educational institution websites?
● How do I find preprint articles or working papers written by legal scholars?
Step 4: Start and maintain a research log of sources to be searched and search terms to use:

- http://lawlibrary.colorado.edu/research-assistant-resources/ (see Sample Research Log)
- Personal research “trails” or histories maintained in Westlaw, Lexis Advance, Bloomberg Law and other databases; Save searches on MyHein, MyLawpac, Google Scholar
Step 5: Capture information and organize it for later retrieval and citation:

- **Where**: Lexis & Westlaw folders, Bloomberg Law *workspace*, Dropbox, Google Docs, Google Drive

- [Perma.cc](https://perma.cc) for citing web sources and avoiding link rot (Wise Law Library subscription)
Create a new Perma Link

Enter any URL to preserve it forever.

Paste your URL here.

Create Perma Link

This Perma Link will be affiliated with Aya Gruber Perma Links > Book > 0Introduction

Aya Gruber Perma Links > Book > 0Introduction Links

Search

https://www.nationalreview.com/2018/01/me-too-women-against-sexual-revolution/
Real Message of #MeToo: The Sexual Revolution Has Not Been Kind to Women

By MONA CHAREN | January 16, 2018 5:00 AM

Signs at a demonstration in Los Angeles, Calif., November 2017 (Reuters photo: Lucy Nicholson)

They feel pressured, they feel disrespected, and they are fighting back.

The feminist website Babe published an account of a date gone bad. The pushback has been swift and sharp. I share some of the concerns of the critics, but I also think young women are sending a message that is being missed.

The account by the anonymous “Grace” about a bad date with comedian Aziz Ansari was, if not
Step 5: Capture information and organize it for later retrieval:

Citation Management Software

- **Powernotes.com** (Wise Law Library subscription)
- **Zotero.org** (free) OR **Juris-M** (a free variant of Zotero)—support for MS Office and Bluebook citation style:
  
  https://libguides.wlu.edu/c.php?g=99586&p=644177
  http://guides.ll.georgetown.edu/citation_tools/zotero
- **Lexis for Microsoft Office** and **Westlaw Drafting Assistant**—cite-checking, quote-checking, citation formatting, table of authorities compilation
**Powernotes**

- **Powernotes** - [https://powernotes.com/](https://powernotes.com/)
  - a subscription-based browser extension that lets you capture sources and citations from multiple websites

- 5-min. video demo of Powernotes

Zotero for Firefox
**LEXIS® FOR MICROSOFT OFFICE® RESEARCH TOOL**

1. **Find All:** Locate legal entities, terms of art, citations and more to gain insight more quickly.

2. **Get Cited Docs:** Validate sources by accessing Shepard’s® Citations Service from within the context of your document. Get Cited Docs creates hyperlinks to legal citations found in your document. See Shepard’s Signal™ indicators in your document and cited documents to ensure citations are accurate and up to date, and easily find additional on-point authority.

3. **Link to Cites:** Citations in your Word document will hyperlink directly to content in Lexis Advance.

4. **Precedents:** Leverage relevant cases, briefs, motions and pleadings.

5. **Guidance:** Find practical guidance from experienced practitioners.

6. **Search & Display:** Conduct research without leaving your document.

5. **Open Folders & Upload File:** Easily save items to a Lexis Advance work folder.

**IT’S ALSO A CITATION CHECKING AND FORMATTING TOOL**

1. **Set and Check Cite Format:** Efficiently match the format you specify.

2. **Check Quotes:** Quickly validate against source documents.

3. **Prepare a Table of Authorities:** Organize with fast, flexible options.

4. **Save time as you ensure style compliance.**

- Use **Set Cite Format** to select citation style manuals, including The Bluebook®, California and New York.

- Use **Check Cite Format** for clear status icons to see at a glance which citations are already correct, may need correcting or are not recognized. Short citations (including id. citations) are corrected at the same time as their parent citations.

Find the Lexis for Microsoft Office download in Resources, under Apps & Tools at: LEXISNEXIS.COM/LAWSCHOOL. Need help? Call 800-45-LEXIS.
Drafting Assistant Essential

Draft your legal documents with confidence.

Do you need to generate a Table of Authorities, format citations, or confirm that your cited authority is still valid? This cloud-based resource enables you to do all that and more in minutes.

Insert Table of Authorities

SAY MORE. Generate a properly categorized and custom formatted list of references from your legal document in minutes. Allowing you to spend your time where it matters.
- Quick Guide
- Helpful Guide
- How to Building a Table of Authorities - Video

Format Your Citations

BE EFFICIENT. Citation Format reviews all of the legal citations in your document and suggests the correct citation format - including Bluebook and Jurisdiction specific formats. Feel confident that your work product is polished before turning it in.
- Quick Guide
- How to Format Citations - Video

WestCheck Your Citations and Create Status Reports

BE ACCURATE. With WestCheck you can verify the status of citations extracted from your document while checking the accuracy of quotations with QuickFind. To ensure you are working with current citations, create a KeyCite Status Report to monitor and update legal documents. These are helpful whether you are starting from the beginning, replicating a colleague's work product, or checking an opponent's argument.
- How to Work with WestCheck - User Guide
- How to Use WestCheck Videos
- How to Insert Flags and Links - Quick Guide
- How to Insert Links and Flags - Video

Avoid Errors with Deal Proof

BE CONFIDENT. Avoid contract drafting errors, cut proofreading time in half, and produce documents reflecting the latest market practices. Let Deal Proof scan your transactional legal document in seconds, alerting you to errors, incompleteness, missing terms, and more.
- Interactive Game: How much time will I save using Deal Proof?

Additional Resources

- Overall User Guide
- Faculty Guide
- How to Use Drafting Assistant Essential - Full Video Training (15 minutes)
Step 5: Capture information and organize it for later retrieval:

Avoid plagiarism: “Submitting the work (whether quoted words, paraphrased words, or ideas) of another, without attribution.” – CU Law School Honor Code

- UCB Libraries: “Cite any information not originally created by you: quotations, key terms or phrases, ideas, facts not broadly known, images and sounds.”

Critically evaluate any web sites you want to recommend. See, e.g., https://libguides.colostate.edu/howtodo/evaluatewebpage.
Step 6: Update your research:

Set up legal alerting and news/journal tracking services to keep updated throughout the research process:

- Citators & alerts on WL, LX, Bloomberg, HeinOnline
- Free news (Google News Alert) and article (Google Scholar Alert) monitoring services
- Free legislative (GovTrack) and regulatory (Regulations.gov) tracking services

Re-run saved database searches at the end
Step 7: Know when to stop research.
See, e.g.,
http://legalresearch.usfca.edu/content.php?pid=196858&sid=1680019
Can I share my research folders on WL/LX/BL with my professor?

What free software can I use to capture citations to library books, news stories, and articles from my web browser?

How do I track a specific case, statute, or regulation in Westlaw? Lexis?
Make an Appointment with Me

- jane.thompson@colorado.edu or 303-492-2705
- Have a fun summer!