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BNA commentary & analysis

PLI content

Dockets

Market, financial, company news & info

Practice centers

Transactional materials & drafting tools

## **Weaknesses**

Comparatively small secondary source collection

Lacks public records, legislative history docs

Citator is weak



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- ☐ Model Business Corporation Act, Annotated

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### Deal Size Range

- ☐ \$0M - \$10M (92)
- ☐ \$50.01M - \$500M (86)
- ☐ \$10.01M - \$50M (77)
- ☐ \$500.01M - \$1B (25)
- ☐ > \$1B (15)

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### Deal Status

- ☐ COMPLETED (283)
- ☐ TERMINATED (8)
- ☐ PENDING (7)

### Deal Type

- ☐ COMPANY TAKEOVER (197)
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- ☐ NO (273)
- ☐ YES (22)

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# Westlaw & Lexis: Classic vs NextGen Platforms

## Classic platforms

Navigate to a specific database – smaller DBs are cheaper

Compose a terms & connectors or natural language search

## NextGen platforms

Search all content

\*\*optional to narrow by jurisdiction, type of content, or specific source)

Enter a simple search which will be processed by a complex, secret search algorithm

Post-search, filter results using facets



Narrow by...

Search within results

 OK

Jurisdiction

Court

Timeline

Source

Practice Areas & Topics

Attorney

Law Firm

Most Cited

Keyword

Judge



	Document Title	Jurisdiction	Court	Date
1.	<p><b>Amador Valley Joint Union High Sch. Dist. v. State Bd. of Equalization, 22 Cal. 3d 208</b></p> <p>... in accordance with the natural and ordinary meaning of its words. ( In re Quinn (1973) 35 Cal.App.3d 473 , 482 [ 110 Cal.Rptr. 881 ] .) The literal language of enactments may be disregarded to avoid absurd results and to fulfill the apparent intent of the framers. (See Friends of Mammoth v. Board of Supervisors (1972) 8 Cal.3d 247 , 259 [ 104 Cal.Rptr. 761 , 502 P.2d 1049 ] ; In re Kernan (1966) 242 Cal.App.2d 488 , 491 [ 51 Cal.Rptr. 515 ]</p>	California	Supreme Court	September 22, 1978
2.	<p><b>Strauss v. Horton, 46 Cal. 4th 364</b></p> <p>... enforce that measure, on the ground that <b>Proposition 8</b> constitutes an invalid revision of the <b>California</b> Constitution. In Tyler v. State of <b>California</b> (S168066), petitioners—one same-sex couple who married in <b>California</b> prior to the adoption of <b>Proposition 8</b> and one same-sex couple who want to marry notwithstanding <b>Proposition 8</b> —seek similar relief, asserting both that <b>Proposition 8</b> constitutes an impermissible constitutional revision and that <b>Proposition 8</b> violates the ...</p>	California	Supreme Court	May 26, 2009
3.	<p><b>Perry v. Schwarzenegger, 704 F. Supp. 2d 921</b></p> <p>Egan and Badgett testified that <b>Proposition 8</b> harms the State of <b>California</b> and its local governments economically. Egan testified that San Francisco faces direct and indirect economic harms as a consequence of <b>Proposition 8</b>. Egan explained that San Francisco lost and continues to lose money because <b>Proposition 8</b> slashed the number of weddings performed in San Francisco. Egan explained that <b>Proposition 8</b> decreases the number of married couples in San Francisco, who tend to be wealthier than ...</p>	U.S. Federal	California Northern District Court	August 04, 2010
4.	<p><b>Perry v. Brown, 671 F.3d 1052</b></p> <p>... of <b>Proposition 8</b> and shapes the basic issues in this case. The official argument in favor of <b>Proposition 8</b>, published in the Voter Information Guide, emphasized this distinction: "<b>Proposition 8</b> doesn't take away any rights or benefits of gay or lesbian domestic partnerships. Under <b>California</b> law, 'domestic partners shall have the same rights, protections, and benefits' as married spouses. (Family Code § 297.5 .) There are NO exceptions. <b>Proposition 8</b> WILL NOT change this." Voter ...</p>	U.S. Federal	9th Circuit Court of Appeals	February 07, 2012
5.	<p><b>Wilson v. Superior Court, 134 Cal. App. 3d 173</b></p> <p>... aspect of <b>Proposition 8</b>, other than the bail provision, that contributed to the drop off of votes as between the two propositions. 15 We note, without deciding, that <b>Proposition 4</b> concerning bail which passed by a larger number of votes than did <b>Proposition 8</b> may prevail only over those provisions in <b>Proposition 8</b> relating to bail to the extent there is a conflict in the provisions of the two propositions. See Cal. Const. art. XVIII, § 4 . <b>California</b> Constitution, article XVIII, section 4 ...</p>	California	2nd District Court of Appeals	July 23, 1982
6.	<p><b>Brosnahan v. Brown, 32 Cal. 3d 236</b></p> <p>... of the state. <b>Proposition 4</b> passed with over 82 percent of the electorate voting in its favor. <b>Proposition 8</b> received only</p>	California	Supreme Court	September 02, 1982

Natural Language Processing (NLP)	Terms & Connectors	NextGen search
Interprets your query	Applies your search literally	NLP+ (interprets your query & adds to it)
Google-like Looks for all terms Ranks by: <ul style="list-style-type: none"> <li>Proximity of terms to one another</li> <li>Location &amp; frequency of terms</li> </ul> Always returns same number of results	Boolean Operators Proximity Limiters Truncation Field/Segment Searching	Complex & secret algorithm Leverages: <ul style="list-style-type: none"> <li>Crowdsourcing</li> <li>Digest</li> <li>Citator</li> <li>Secondary sources</li> <li>And much more</li> </ul>
Classic WL & LN, BLaw Quick Search	Classic WL & LN, BLaw Detailed Search	WestlawNext, LexisAdvance



## Content

News

Matthew Bender titles

Public records (Accurint)

## Price

Less expensive than  
Westlaw

No additional cost for  
Advance

## Features

Shepard's

Lexis for Microsoft Office  
(LMO)



# Strengths

## Content

Thomson, West, Rutter Group treatises

## Features

West's digest system

WLN search is superior

- incorporates digest, KeyCite, crowdsourcing

WLN came out 1<sup>st</sup> and is beyond more of the growing pains of a new platform

**A Note on Price:** Surcharge for WLN



# The future...

Classic platforms are on their way out

- Lexis: within 2–3 years; starting this summer you must login via LexisAdvance
- Westlaw: no date announced

Boolean searching is still relevant

- can get better results even on nextgen platforms
- newest kid on the block, Bloomberg, encourages Boolean

Industry experts are still expecting  
Bloomberg to compete





# PRACTICE GUIDES



# Key Sources You Will Need : Practice Guides

- Step-by-step manuals on every imaginable legal scenario that you will have to prepare for



*By and for California Lawyers*

# Example: CEB Practice Guide— Child Custody Litigation

§1.5

## c. Legal Custody Checklist



Requesting simply "joint legal custody" will, in most contested custody cases, not be sufficient to resolve the many problems clients will face as they try to make decisions for the child. This section anticipates the creation of language that will be specific to the needs of each case. See [Fam C §3083](#). Because it is impossible to predict what will happen in each individual case, the "reasonable standard language" and requesting its incorporation into the clients' judgments is good practice.

The following are examples of ways in which specificity may alleviate conflict in joint legal custody arrangements:

### CHECKLIST

#### 1. Consistent Refusal to Notify Other Parent of Important Dates or Events

*Problem:* One party consistently refuses to notify the other of important medical appointments or extracurricular activities.

*Solution:* An order specifying a minimum time frame in which such information is to be provided. Alternatively, an order that parents exchange a weekly or monthly schedule pertaining to the child. An alternative may be utilizing an online computer program designed for family scheduling that is accessible from different computers and mobile devices.

#### 2. One Party Lacks Information About Child's Medical or Other Providers

*Problem:* One party (likely the lower timeshare parent) is not given information regarding the child's providers, be it medical, educational, or other.

*Solution:* An order specifying that both parents be listed on **all** information forms for the children, so that school and health information will be provided to both parents.

#### 3. Existing Timeshare Severs Contact Between Child and Parent With Lower Timeshare

*Problem:* Because of the alternation of custodial time, the lower timeshare parent may have periods of time in which contact with the child is severed for days or even weeks at a time.

*Solution:* Provided the age of the child makes such an order feasible, an order providing for regular (or, if appropriate, unlimited) telephone or computer (webcam) contact for both parents. This is inherent in [Fam C §3020\(b\)](#), which states as its goal that each child should be provided frequent and continuing contact with both parents.

# Example: CEB Practice Guide— Child Custody Litigation

§19.50

## B. Form: Child Abduction Prevention Order Attachment (Judicial Council Form FL-341(B))



Print

PETITIONER:		FL-341(B)
RESPONDENT:		CASE NUMBER:

### CHILD ABDUCTION PREVENTION ORDER ATTACHMENT

TO ☐ *Child Custody and Visitation Order Attachment (form FL-341(A))* ☐ *Other (specify):*

1. The court finds there is a risk that (specify name of parent): \_\_\_\_\_ will take the child without permission because that parent (check all that apply):
- a. ☐ has violated—or threatened to violate—a custody or visitation order in the past.
  - b. ☐ does not have strong ties to California.
  - c. ☐ has done things that make it easy for him or her to take the children away without any permission, such as (check all that apply):
    - ☐ quit a job. ☐ sold his or her home.
    - ☐ closed a bank account. ☐ ended a lease.
    - ☐ sold or gotten rid of assets. ☐ hidden or destroyed documents.
    - ☐ applied for a passport, birth certificate, or school or medical records.
    - ☐ Other (specify): \_\_\_\_\_
  - d. ☐ has a history of (check all that apply):
    - ☐ domestic violence.
    - ☐ child abuse.
    - ☐ not cooperating with the other parent in parenting.
  - e. ☐ has a criminal record.
  - f. ☐ has family or emotional ties to another country, state, or foreign country.
- (NOTE: If item "f" is checked, at least one other factor must be checked, too.)

THE COURT ORDERS, to prevent the parent in item 1 from taking the children without permission:

2. ☐ **Supervised visitation.** Terms of visitation are (check one):  
☐ as specified on attached form FL-341(A) ☐ as follows:

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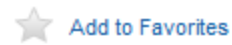
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A plaintiff commences a lawsuit in federal court by filing a complaint ([FRCP 3](#)). The complaint, which is typically the first opportunity for the plaintiff to tell its story to the court and opposing counsel, should be clear, persuasive and well written. Although drafting an effective complaint is more art than science, the Federal Rules of Civil Procedure (FRCP), and often the court's local rules, impose certain requirements on its content. These rules also govern the substance and form of the other case initiating documents, including the summons, Rule 7.1 disclosure statement and civil cover sheet. This Note explains how to:

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## Accounting for Income Taxes

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### Accounting for Income Taxes

- ☐ Portfolio 5000-5th: Accounting for Income Taxes — FASB ASC 740 **Search**
- ☐ Portfolio 5001-1st: Accounting for Income Taxes: Fundamental Principles and Special Topics
- ☐ Portfolio 5002-2nd: Accounting for Income Taxes: Uncertain Tax Positions
- ☐ Portfolio 5003-2nd: Accounting for Income Taxes: Uncertain Tax Positions — Selected Topics
- ☐ Portfolio 5004-1st: Accounting for Income Taxes: Uncertain Tax Positions in Transfer Pricing

# Bloomberg – Books & Treatises

Materials from the Practising Law Institute (PLI) can be found in Bloomberg under the tab for Books & Treatises

The screenshot displays the Bloomberg Law website interface. At the top, the Bloomberg Law logo is on the left, and a search bar with the text "Find cases, news, companies, people and more..." and a green "GO" button is on the right. Below the search bar is a navigation menu with tabs: Home, Search & Browse, Practice Centers, Litigation & Dockets, Transactional Law (highlighted), Legislative & Regulatory, Legal Analysis & News, and Companies & Markets. Below the navigation menu, a breadcrumb trail reads "Search & Browse > Books & Treatises >". The main heading is "Practising Law Institute Books & Treatises". Below this heading, there are three columns of book titles, each preceded by a right-pointing arrow. The first column lists books related to patent law and life sciences. The second column lists books related to employment law, estate planning, and evidence. The third column lists books related to elder law, outsourcing, SEC executive compensation, Sarbanes-Oxley Act, securities offerings, patent law, patent licensing, patent litigation, and personal bankruptcy.

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## Practising Law Institute Books & Treatises

- ▶ 2008 Federal Circuit Yearbook: Patent Law Developments in the Federal Circuit
- ▶ 2009 Federal Circuit Yearbook: Patent Law Developments in the Federal Circuit
- ▶ 2010 Federal Circuit Yearbook: Patent Law Developments in the Federal Circuit
- ▶ A Practical Guide to Life Sciences Companies: Commercializing & Protecting Innovation
- ▶ A Practical Guide to the Red Flags Rules: Identifying and Addressing Identity Theft Risks
- ▶ Accountant's Liability
- ▶ Advertising & Commercial Speech: A First Amendment Guide
- ▶ Advising High Technology Companies
- ▶ Employment Law Yearbook 2008
- ▶ Employment Law Yearbook 2009
- ▶ Employment Law Yearbook 2010
- ▶ Employment Law Yearbook 2011
- ▶ Equipment Leasing-Leveraged Leasing
- ▶ Estate Planning & Chapter 14: Understanding the Special Valuation Rules
- ▶ Evidence in Negligence Cases
- ▶ Exempt and Hybrid Securities Offerings
- ▶ Expert Witness Answer Book 2012
- ▶ Faber on Mechanics of Patent Claim Drafting
- ▶ Federal Bail and Detention Handbook
- ▶ New York Elder Law Handbook
- ▶ Outsourcing: A Practical Guide to Law and Business
- ▶ PLI's Guide to the SEC's Executive Compensation and Related Party Transaction Disclosure Rates
- ▶ PLI's Guide to the Sarbanes-Oxley Act for Business Professionals
- ▶ PLI's Guide to the Securities Offering Reforms
- ▶ Patent Law: A Practitioner's Guide
- ▶ Patent Licensing: Strategy, Negotiation, and Forms
- ▶ Patent Litigation
- ▶ Personal Bankruptcy Answer Book


# CEB OnLaw


The screenshot shows the CEB OnLaw website interface. At the top is a dark blue navigation bar with icons and labels for 'ToC', 'Document', 'Search', 'Results', and 'Print'. Below this is a sidebar on the left titled 'Available Publications' with a list of legal topics, each preceded by a plus icon in a square box. The main content area on the right has a white background. It features the heading 'Welcome to OnLAW' in blue, underlined with a yellow line. Below the heading are three icons: a question mark in a box labeled 'User Guide', a circular arrow labeled 'Support', and the CEB logo labeled 'MyCEB'. Further down is the section 'Getting Started' with a yellow square bullet point followed by the text 'Use the Table of Contents on the left to browse CEB's titles'.


**Available Publications**

- + Business Law
- + Civil Litigation
- + Criminal Law
- + Employment Law
- + Estate Planning
- + Evidence
- + Family Law
- + Real Property
- + Torts
- + Workers' Compensation
- + General Interest

## Welcome to OnLAW

 User Guide

 Support

 MyCEB

### Getting Started

■ Use the Table of Contents on the left to browse CEB's titles

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[page](#)

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once you become a  
member of the CA  
bar.





# CEB OnLaw



## Available Publications

- ☐ Business Law
- ☐ Civil Litigation
- ☐ Criminal Law
- ☐ Employment Law
- ☒ Estate Planning
- ☐ Evidence
- ☐ Family Law
- ☐ Real Property
- ☐ Torts
- ☐ Workers' Compensation
- ☐ General Interest



## Welcome to OnLAW



User Guide



Support





MyCEB


## Getting Started


- Use the Table of Contents on the left to browse CEB's titles


# CEB OnLaw – CA Estate Planning

ToC

Document

Search

Results

Print

Available Publications

+ Business Law

+ Civil Litigation

+ Criminal Law

+ Employment Law

- Estate Planning

+ Administering a Single-Person Trust After Settlor's Death (Action Guide)

+ Business Succession Planning: Strategies for California Estate Planners and Business Attorneys

+ California Conservatorship Practice

- California Decedent Estate Practice

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Selected Developments

Cutoff Dates and CEB Citation


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+ 3 Transfer of Personal and Real Property in Small Estates

+ 4 Spouses and Registered Domestic Partners:

## Welcome to OnLAW

User Guide

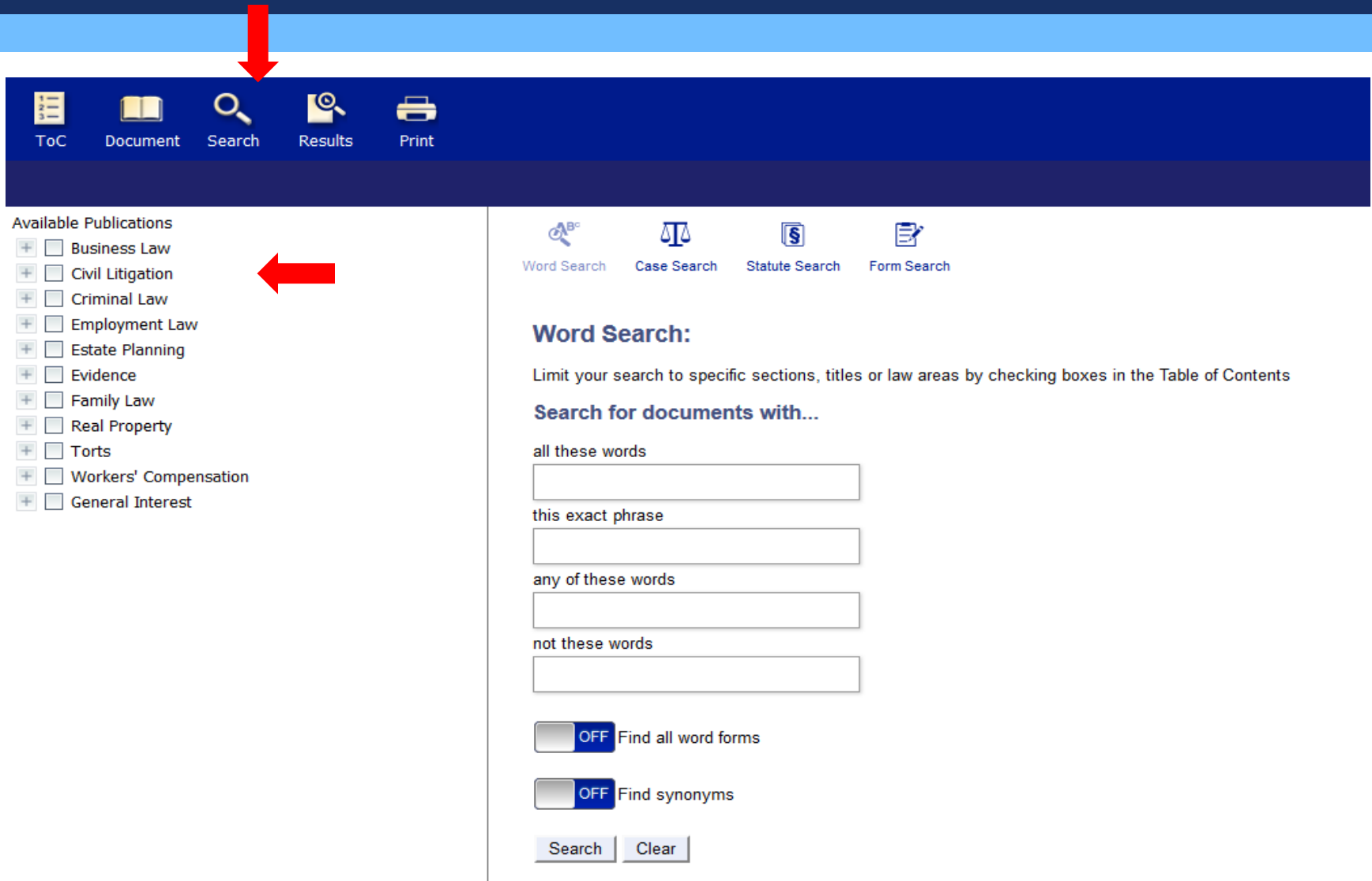
Support



## Getting Started

- Use the Table of Contents on the left to browse CEB's titles
- Use the Search button in the toolbar above to run a search

# CEB OnLaw – Search by keyword or form



The screenshot shows the CEB OnLaw search interface. At the top, a dark blue navigation bar contains icons for ToC, Document, Search, Results, and Print. A red arrow points to the Search icon. Below the navigation bar, the left sidebar is titled "Available Publications" and lists ten categories, each with a plus icon and a checkbox. A red arrow points to this list. The main content area on the right has a sub-navigation bar with icons for Word Search, Case Search, Statute Search, and Form Search. Below this, the "Word Search:" section includes instructions to limit searches by checking boxes in the Table of Contents. It features four text input fields for "all these words", "this exact phrase", "any of these words", and "not these words". At the bottom, there are two toggle switches for "Find all word forms" and "Find synonyms", both currently set to "OFF". Finally, there are "Search" and "Clear" buttons.

**Navigation Bar:**

- ToC
- Document
- Search
- Results
- Print

**Available Publications:**

- ☐ Business Law
- ☐ Civil Litigation
- ☐ Criminal Law
- ☐ Employment Law
- ☐ Estate Planning
- ☐ Evidence
- ☐ Family Law
- ☐ Real Property
- ☐ Torts
- ☐ Workers' Compensation
- ☐ General Interest

**Search Options:**

- Word Search
- Case Search
- Statute Search
- Form Search

**Word Search:**

Limit your search to specific sections, titles or law areas by checking boxes in the Table of Contents

**Search for documents with...**

all these words

this exact phrase

any of these words

not these words

☐ OFF Find all word forms

☐ OFF Find synonyms

# Free and Low-Cost Legal Resources

## LRC Handout:

### Reasons you might need these:

- Unrestricted access to everything ends when you graduate.
- You are NOT allowed to use your Westlaw academic account for most paid summer positions.
- Attorneys use free sites to supplement their WL/Lexis research. Clients don't want to pay for "research"
- Lexis/WL may not have what you need





Research Questions?

Contact the LRC  
Reference Librarians

[lrcref@san Diego.edu](mailto:lrcref@san Diego.edu)

(619) 260-4612

We can help!

