

One Size Does Not Fit All: LexisNexis® Total Search and Law Firms' Knowledge Management Needs

Joe Swimmer gives the details on the latest application from the LexisNexis suite of knowledge management tools and technology. This software is not yet available in the UK but it is hoped that it will be released shortly.

Introduction

Today, law firms and legal professionals face increased client and market demands for greater efficiencies and productivity in delivery of their services. These demands come at the same time that firms face increasingly competitive market pressures, stable or declining revenue streams and recruiting and mentoring issues from junior legal professionals, which means that law firms are seeking tools and processes to create new efficiencies and enhance productivity in the practice of law and the business of running the law firm.

Leveraging over 30 years of experience, LexisNexis has a deep understanding of the legal market place and its evolving needs for solutions that fit into existing cultures and workflows, whilst at the same time delivering high return on investments. Rather than offering a single technology application that purports to create a “silver bullet for knowledge sharing within a firm”, LexisNexis has designed a suite of technology applications and functionality enhancements that further the various knowledge sharing initiatives within a legal organization.

As part of this suite of productivity tools, LexisNexis offers an integrated search application that meets a growing demand to increase workflow efficiencies among legal professionals. LexisNexis® Total Search is a web browser-based application expanding the boundaries of the LexisNexis® Total Research System by letting a user combine searches on *lexis.com*® with her firm's most valuable assets – the intellectual property and collective expertise already residing within the firm. Once LexisNexis Total Search is installed on a firm's network, users can quickly and easily find relevant work product, including existing pleadings, depositions, transactional materials, memos and motions written by the lawyers,

together with trusted information from LexisNexis – in one search through the familiar *lexis.com* user interface.

The LexisNexis Total Search (“LNTS”) application works in the same manner as *lexis.com*. The difference is that a user can search her firm's internal know-how when searching any LexisNexis database or file. She can then review the results of these internal searches by navigating between easily recognisable firm and *lexis.com* results.

Lexis Nexis Total Search also allows a user to search only her firm's internal work product using the familiar *lexis.com* “look and feel” and search syntax. This internal content searching ensures that users take advantage of internal knowledge and best practices before searching paid services via the internet.

Further efficiencies and productivity enhancements are achieved by the integration of LexisNexis content within the firm's work product. LexisNexis Total Search identifies, “correlates,” or cross-references, and links case citations appearing within internal documents and *lexis.com* search results. These citations are noted, and access to the internal document provided, through “correlation” icons appearing next to a particular case or code citation within an internal document result, full-text document on *lexis.com* or in a *lexis.com* cite list. Importantly, “correlation” icons for pinpoint citations are also provided. This level of cross-referencing between internal documents and *lexis.com* results provides a user with internal or *lexis.com* content that is more likely to be relevant to their research or drafting exercise. Further, case law and statutes will be given appropriate *Shepard's* Signal treatment, with links to the full *Shepard's*® report.

LexisNexis Total Search furthers a firm's objective of sharing in-house expertise and knowledge throughout the organisation by:

- Reducing the volume of unproductive e-mail exchanges, intranet postings or other “has anyone ever done this” queries seeking experience on specific

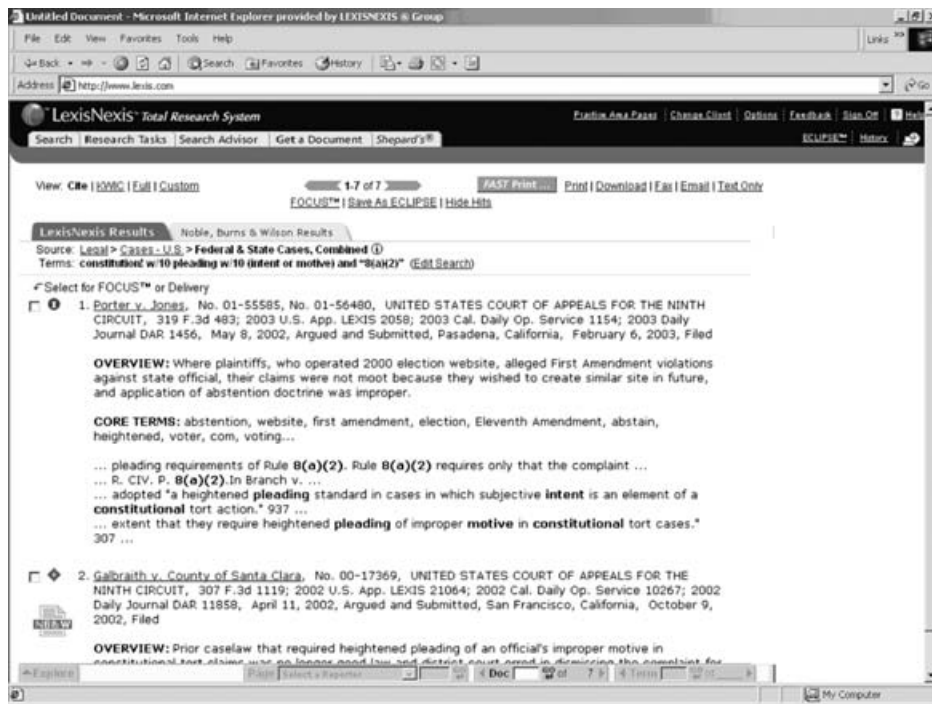


Figure 1: Search results from LexisNexis Total Search, which allow users to toggle between lexis.com and internal firm search results.

research or drafting tasks, resulting in time savings and more efficient use of resources because valuable time is not spent “recreating the wheel.”

- Sharing best practices and drafting styles among work groups and practice areas.
- Enhancing and foster mentoring and training of junior lawyers enabling them to increase their value to the organisation more quickly.
- Maximising current investments in document management systems and other applications through the capture and reuse of the lawyers’ work product that otherwise is lost in the vast DMS repository.

How LexisNexis Total Search Works

As a browser-based application, users passively search LexisNexis databases and internal firm content. In addition, LNTS intelligently cross-references relevant LexisNexis content and internal work products based on case citations and legal topics.

There are three major components that make up the LexisNexis Total Search application:

- A firm’s document repository
- An enhanced *lexis.com* user interface
- A user’s Internet browser

Firm’s Document Repository

LexisNexis Total Search maintains a separate Internal Document Repository (IDR) where a firm’s best work product is stored for searching. To create and maintain the

IDR, LNTS does the following:

- The Document Selector scours the firm’s DMS to select documents meeting customisable criteria set by a firm’s Total Search administrator.
- As retrieved documents are pulled from the DMS, the Document Selector automatically indexes their full text, legal citations and metadata so this information is incorporated into searching when using the application.
- The retrieved documents are converted to HTML, and tagged with hypertext links to cited cases.
- The HTML copies are stored in the firm’s IDR on a dedicated server along with the citation, full-text, and metadata indices. These indices allow intelligent cross-referencing between LexisNexis content and the firm’s work product, not only through citations, but also through topics and concepts. Plus, the IDR server remains behind the firm’s firewall, becoming the secure source from which internal work product is searched, whilst maintaining the same access control and document security as set for individual documents and users in the firm’s existing DMS.

The application is designed to work with a firm’s existing Document Management System (DMS) allowing for easy document porting and updating. Further, LNTS maintains the security profiles associated with individual documents or content, meaning that a user will only have access to content that she is authorised to see in the existing DMS.

Enhanced *lexis.com* User Interface

The second component of LNTS sits outside a firm’s firewall – the same *lexis.com* used today, only enhanced to

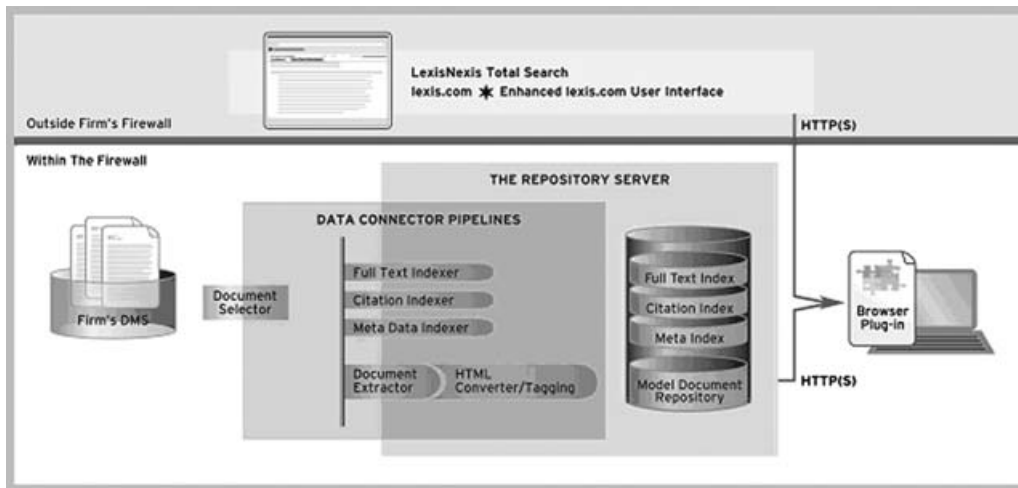


Figure 2: Diagram illustrating how LexisNexis Total Search retrieves documents.

provide a single point to access all the LexisNexis content and a firm’s internal content simultaneously.

LexisNexis Total Search relies on this enhanced *lexis.com* interface for searching across both *lexis.com* and the firm’s content. Because it uses the familiar *lexis.com* environment and search syntax, LexisNexis customers are already familiar with this environment. The result is minimal training and a less complicated deployment to the legal professionals within the organisation.

User’s Internet Browser

The third component is a user’s internet browser. Within the web browser, the user may seamlessly interface and search both LexisNexis and internal content.

Building on the web browser, a known and understood portal to information, LNTS is designed to provide maximum value to research and knowledge sharing within and across previously disconnected data sets – a firm’s internal knowledge base and the broad perspective available from the LexisNexis® services, which hold the world’s largest collection of legal, news and business information and public records.

Because LNTS is built with ease-of-implementation and scalability as cornerstones, the application:

- Easily integrates with a firm’s IT infrastructure.
- Is built on an open architecture platform ensuring that future firm systems may be tied to the Total Search engine.
- Automates selection and indexing of documents, requiring minimal outside resources to populate the internal document repository.
- Respects security permissions resident in a firm’s existing DMS as documents are indexed and made available to end-users.
- Offers reporting and administrative controls requiring minimal IT staff time or effort.
- Requires virtually no training because the user interface is intuitive and based on what users already know – *lexis.com*.

LexisNexis Total Search Features

Easy Searching of Internal Work Product

Only a selected set of documents meeting certain criteria defined by a firm’s administrator are populated into the IDR indexing system. Through an automated process, the relevant documents are pulled from the firm’s DMS or flat file system, indexed and stored in the IDR database. This content is then searchable from the enhanced *lexis.com* user interface. Features of searching the internal content include:

- Internal document retrieval from this single search is fast.
- Confidential content is protected, as document access is determined by a firm’s administrator based on existing security protocols assigned in the DMS.
- Internal document searching is secure as work product always remains securely within a firm’s firewall.
- Because legal professionals know how to search at *lexis.com*, minimal training is required to use the single search feature.

The content stored in the IDR is searchable by the user in one of two ways: passive single searching or direct IDR searching (firm-only document searching). LexisNexis Total Search is designed to simultaneously and securely search LexisNexis databases and internal work product, created within a firm’s DMS or other content application, with a single search using the familiar *lexis.com* user environment and search syntax. Users searching within the LNTS application for a specific case, legal issue or even person automatically search for the same information within a firm’s internal content. As the search is run in the chosen LexisNexis database, it is also seamlessly (or without the user having to consciously initiate a search) run against the content in the IDR.

The internal firm results from this seamless search are easily recognisable on the user’s *lexis.com* screen. By

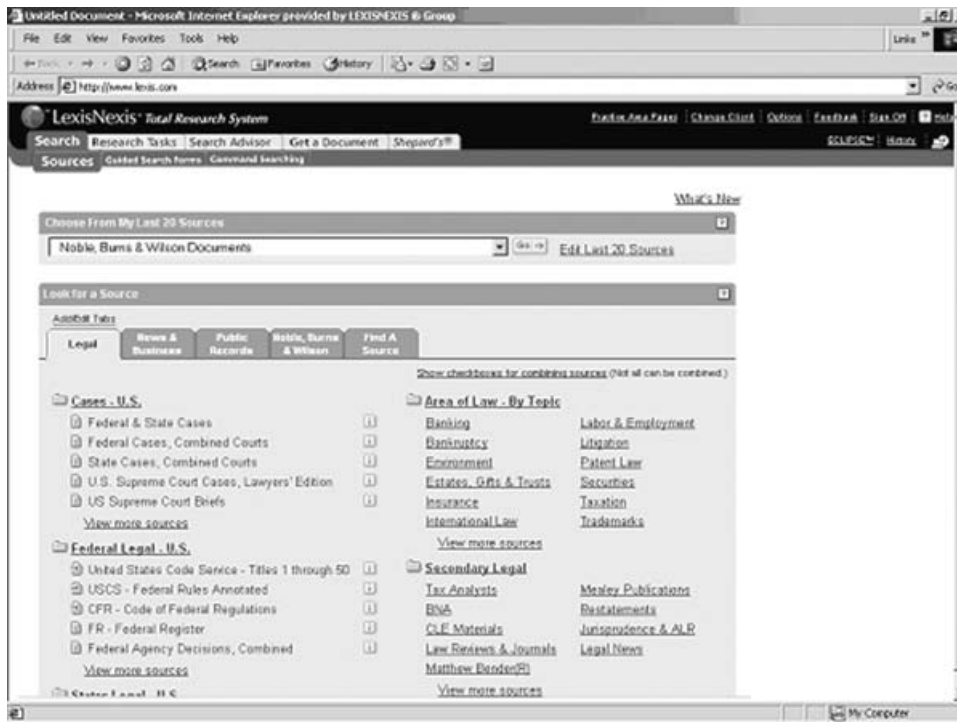


Figure 3: Searching options on LexisNexis Total Search allow users to search firm-only documents.

clicking on the “firm results” button, a user may review findings from the IDR search corresponding to the search terms run against the LexisNexis database. She will be given

- Automatic notification of internal documents that might further the drafting or research being performed.
- A familiar means to capitalise on the firm’s best internal work product using proven searching techniques.

The user also has the option of using LNTS to find materials residing within his/her firm’s IDR only, which is easily accomplished by selecting the firm identifier on the enhanced *lexis.com* user interface. This link opens a new browser window where the user enters her search, which is then polled against the IDR only, and the results are returned in the separate browser window. Searching within internal work product also ensures that resources are used efficiently, and that internal work is reviewed prior to using for fee services.

Results Display

Relevant results from seamless single searches are delivered in the familiar *lexis.com* format – but with two distinct enhancements:

- Search results are now displayed in two ways. One displaying search results from LexisNexis and the other showing search results from the firm’s internal work product – making access to both quick and convenient.

- Any *lexis.com* case law or statutory citation results that are also cross-referenced within one or more internal documents have a “correlation” icon denoting the presence of relevant existing internal work product. This “correlation” icon makes internal references immediately noticeable with direct links to them only one click away.

For internal document searches, content from the firm’s IDR is displayed in the familiar *lexis.com* cite list format with important information (metadata) available at a glance, such as document date, author, and client number, allowing the user to assess quickly the internal document. A user may conveniently review the IDR results in a cite list format or go to the full text by simply clicking on the document title, just like at *lexis.com*.

Intelligent Cross-Referencing Within Results

Intelligent cross-referencing of LexisNexis content and internal work product using citations and Boolean searching is at the heart of the LexisNexis Total Search. This application relies on more than just citations to achieve cross-referencing between all *lexis.com* research databases (cases, codes, public records, news and business) and a firm’s best internal work product. The first piece of this intelligent cross-referencing is the visible, embedded links to case law, code citations, *Shepard’s* reports or other LexisNexis content found in any LexisNexis or internal content. Case and code links are integrated and embedded in the firm’s IDR documents making it quick and easy for end-users to review underlying case law or code sections appearing in their internal documents. Any case or code

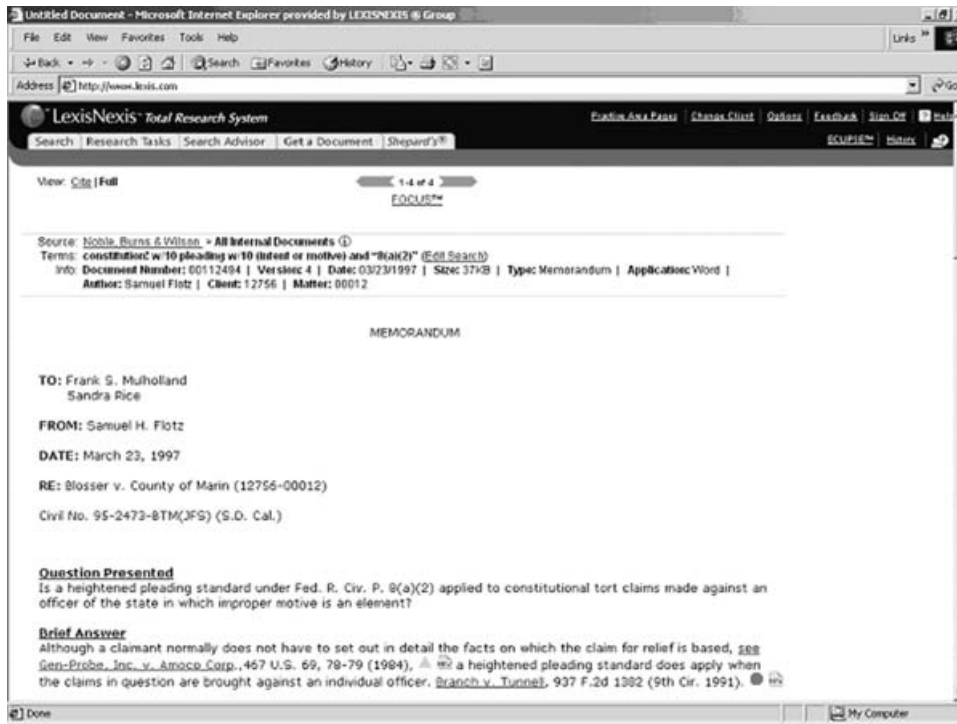


Figure 4: Shepard's Citations are embedded in both lexis.com and firm documents within LexisNexis Total Search.

citation appearing in *lexis.com* or internal content results is also linked to full text case law or statutory citations within the *lexis.com* system. A user also receives appropriate *Shepard's* Signal treatment for the case citations, with the underlying *Shepard's* report only a click away. Links to the *Shepard's* reports are also inserted for the code citations. The second part of intelligent referencing is the "correlation" between and amongst internal work product and LexisNexis data. Content within the firm's IDR is "correlated" to content from the LexisNexis databases, such that if a citation in the current document is cited in a LexisNexis document (or another firm document), then a correlation icon will appear next to it. LexisNexis results are similarly "correlated" to IDR results based on the presence of the same case or code citations within internal content. Firm icons link *lexis.com* and internal work product results sets.

This feature is designed to alert a user to internal content referencing the case or code citation that the user is reviewing. The firm icon appears in the *lexis.com* search results (Cite, KWIC™ or Full Text) indicating that at least one internal firm document from the firm's IDR cites that specific case or code. The customisable icon links that user to the document or list of documents in the IDR that references that case citation.

- In the Cite format, the case or code citation appearing in an IDR document is indicated by a firm icon next to the cite list entry.
- With full-text formats, a firm icon will appear at the top of the search results indicating that a firm IDR document references the citation.

Similarly, if an IDR document result has embedded citations that are "cross-referenced" (or, are cited) in another

firm document, then a firm icon appears next to that citation within the IDR document. LexisNexis Total Search is unique among integrated searching applications in providing a "cross-reference" within the content from the IDR, meaning that a user is quickly alerted if there is another document within the IDR that references a case or code citation within the document they are currently reviewing. Within internal know how, both full-case citations and their subsequent short-form citations are automatically hyperlinked within internal documents, so that a user can quickly link directly to the case or pinpoint page at *lexis.com*. In addition, short-form citations are only correlated to internal documents that cite the pinpoint page(s), increasing the likelihood of a user reviewing internal work product that is directly on-point to their research or drafting project.

Shepard's Citations Embedded Within Results

The *Shepard's* Signal feature provides immediate and current information on the *Shepard's* treatment of a particular case citation and the ability to link to the full *Shepard's* report for a case citation in either the firm's internal documents or in LexisNexis results.

Real time integration of *Shepard's* Signal indicators within internal work product and *lexis.com* search results allows users to view the current treatment of all embedded citations within both internal documents or *lexis.com* search results. *Shepard's* Signal indicators are displayed after each citation letting the user know at-a-glance the *Shepard's* treatment for each case, and whether review of the full *Shepard's* report is needed to determine if the case

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is still good law for the point being supported. The user will know immediately whether to use the internal document to complete her task, or whether updating on the point of law is necessary.

Security

LexisNexis Total Search:

- Assures security and maintains the confidentiality of a firm's most important assets because all documents reside on a firm's network, and behind the firm's firewall.
- Ensures the highest level of security for controlling document access and entitlement and maintaining the confidentiality of a firm's internal work product.
- Protects firm documents from being intercepted by outsiders by requiring user access be only through a secure firm network connection.

The firm's most important assets are secure

When using LNTS, a firm's internal documents and work product are always physically stored on-site, and are secured by the firm's firewall and existing network security protocols preventing unauthorised access to confidential or sensitive materials. The security structure designed for LNTS requires that the internal document repository, where the firm's data resides, be installed within the firm's existing network infrastructure and protected by the firm's firewall. This ensures that a user or third party may not access the internal content repository system, unless that individual is physically inside the firm's firewall and has been granted permission to review the internal data. This security structure assures that confidential or sensitive content or materials will not end up in the wrong hands.

The firm controls document access and entitlement

Proper entitlement to internal content is an integral part of the system. Document access rights are managed

according to firm designated permissions or rules. LexisNexis Total Search is designed to retain the same access control and document security permissions set for individual documents and/or users as applied by the firm administrator in the existing document management systems. Importantly, its design means that firm administrators don't need to take time to assign new security protocols to content residing within the IDR.

The result is that LexisNexis Total Search allows users to access the system with proper authentication and authorisation, and then to view only those documents or content to which they are entitled. For example, the application can be administrated so that the security/entitlement rules in the DMS system, such as DOCS-Open or iManage, are mirrored in the LNTS system, ensuring that confidential or sensitive data is protected. This feature is critical in protecting the firm from conflict of interest, firewall or ethical breaches.

Access to the firm's work product is protected

LexisNexis Total Search further requires that remote users be logged directly into the firm's network, which could include the firm's local and/or wide-area network, through VPN or secure dial-up. Since user access to internal documents will not go through the public network, there is no chance of being intercepted externally. In order to ensure proper security measures, LNTS cannot be accessed from the internet (i.e., outside the firm's firewall). Users must be subscribed *lexis.com* users and be entitled to use the product.

Conclusion

With an integrated search tool built on the award-winning *lexis.com* user environment, LexisNexis Total Search is a revolution in legal research, expanding the LexisNexis Total Research System and broadening the legal professional's universe well beyond cases and codes.

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