



## **Jackson Lewis**

# Automated Docket Retrieval System



Jackson Lewis, LexisNexis and  
TRG Screen Create Automated  
Docket Retrieval System



# The Client

## JacksonLewis

JACKSON LEWIS IS A PREMIER LAW FIRM SPECIALIZING IN LABOR AND EMPLOYMENT LAW SINCE 1958, COMPRISING MORE THAN 950 ATTORNEYS. THE FIRM'S GOAL IS TO HELP EMPLOYERS DEVELOP PROACTIVE STRATEGIES AND BUSINESS SOLUTIONS THAT REDUCE WORKPLACE RISK. TO ACHIEVE THIS GOAL, JACKSON LEWIS ADOPTS A PREVENTIVE APPROACH BY PARTNERING WITH CLIENTS TO MINIMIZE WORKPLACE-RELATED DISPUTES. THIS IS DONE BY EDUCATING EMPLOYERS ON LEGAL TRENDS, JUDICIAL DEVELOPMENTS, AND STATUTORY AND REGULATORY COMPLIANCE. JACKSON LEWIS PRIORITIZES CLIENT SERVICE AND HAS AN ENVIABLE CLIENT RETENTION RATE.

The firm provides a wide range of value-added programs and services, including local and national programs, webinars, newsletters, and legal alerts regarding emerging developments. With local offices across the U.S., Jackson Lewis provides representation to employers of all sizes from coast to coast. The firm's national practice groups ensure that all its attorneys throughout the country have easy access to the latest resources in each practice area. Jackson Lewis also has an International Employment practice and a relationship with L&E Global, which allows it to assist multinational employers on issues that extend beyond borders. Finally, Jackson Lewis attorneys take the time early on in any matter to analyze the legal issues and clients' business objectives, then develop a strategy that takes both into account, providing legal solutions that make business sense.

"Effective collaboration was crucial for improving service delivery and optimizing the utilization of resources. Working closely with LexisNexis and TRG Screen, we were able to achieve this objective through a streamlined process that ultimately enhanced our ROI. Both LexisNexis and TRG Screen demonstrated a high degree of flexibility and willingness to collaborate with us to achieve our shared goals."

**Alirio Gomez, Knowledge Manager, Jackson Lewis**

## Firm's Desired Results

- **Optimize the retrieval of dockets and complaints for improved efficiency.**
- **Provide precise information on requested dockets and complaints to attorneys.**
- **Allocate more time for reference librarians to focus on high-priority tasks.**

## Situation

EFFICIENT ACCESS TO INFORMATION IS A CRUCIAL ASPECT OF KNOWLEDGE MANAGEMENT IN LAW FIRMS. ALIRIO GOMEZ, KNOWLEDGE MANAGER AT JACKSON LEWIS, RECOGNIZES THIS AND FOCUSES ON DEVELOPING AND IMPLEMENTING PROCESSES THAT STREAMLINE THE DELIVERY OF SERVICES TO ATTORNEYS WHILE IMPROVING PRODUCTIVITY. TO FACILITATE KNOWLEDGE SHARING AND ENSURE EFFICIENCY, GOMEZ EMPLOYS A RANGE OF WORK PRODUCTS.

Recently, Gomez has been keen to bring this same level of efficiency to the docket and complaint retrieval process at his firm. Like many other law firms, the reference desk at Jackson Lewis receives numerous requests for docket and complaint retrieval each day. To manage and track these requests, the firm relies on TRG Screen's Quest, a comprehensive inquiry and request management system that caters specifically to the needs of law firms.

Quest allows firms to track, prioritize, allocate, and resolve requests efficiently and securely— even across remote teams. Requests are promptly routed to the most suitable team or individual with clear accountability and ownership. Quest takes over the management of your enquiry workflow, ensuring you can focus on the four stages that make up 'value add' for a request management system: Request, Resolve, Report, Reuse.

"We were able to achieve this objective through a streamlined process that ultimately enhanced our ROI."

**Alirio Gomez, Knowledge Manager, Jackson Lewis**



Once a request is received, Jackson Lewis' reference desk conducts research on the requested docket or complaint using LexisNexis® CourtLink®. This platform offers the industry's largest collection of dockets and documents, which are vital sources of intelligence for both litigation and business purposes.

Gomez recognized that the manual process for docket and complaint retrieval was intensive and time-consuming. He was determined to find a way to streamline the process and make it more efficient. To achieve this, he set his sights on automating the delivery of docket and complaint retrieval.

"LexisNexis is committed to simplifying our customers' workflow. Many firms report that Quest is indispensable for managing incoming research requests. Quest leveraged the LexisNexis APIs and metadata elements to automate these requests. Working together, LexisNexis and TRG Screen have provided an innovative solution for our mutual customers."

**Jeff Pfeifer, Chief Product Officer, LexisNexis North America, UK and Ireland**

# The Solution

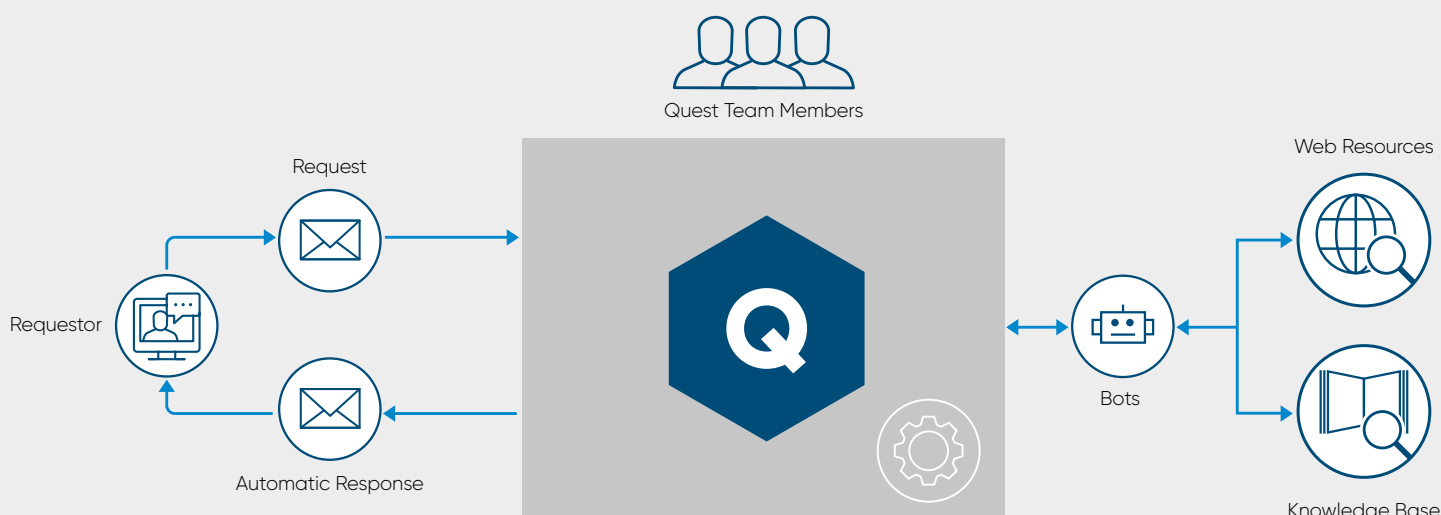
GOMEZ COLLABORATED WITH LEXISNEXIS TO IMPROVE PRODUCTIVITY AT THE FIRM BY DEVELOPING A WAY TO AUTOMATE THE DELIVERY OF DOCKET AND COMPLAINT RETRIEVAL. THIS COLLABORATION LED TO THE DISCOVERY THAT LEXISNEXIS COULD CREATE AN API TO WORK WITH TRG SCREEN'S QUEST BOT AND AUTOMATE THE RETRIEVAL PROCESS.

"...they get all of the benefits of the integration without any of the overhead of having to build it themselves."

**Richard Mundell, Chief Product Officer at TRG Screen**

To achieve this goal, the team had three critical initiatives in mind. The first was to integrate the TRG Screen Quest platform with the LexisNexis platform to enable seamless cross-platform functionality via the API. The second was to connect these disparate systems with Jackson Lewis' internal systems, allowing the platforms to work together seamlessly. The third initiative was to ensure that accurate documents were delivered to the requestor.

A first-of-its-kind collaboration was the key driver behind the successful completion of this effort. Gomez developed a prototype, TRG Screen created a Quest bot, and the LexisNexis team worked on the API. This collaborative process paved the way for a remarkable outcome.



**TRG Screen's bot**

The automated system works by having Quest bots identify and act on inbound emails, requesting a docket or complaint from LexisNexis CourtLink. Once a match is found, an email is generated that includes a link to the requested document. The Legal Research team then reviews the request for additional context before sending a reply to the requestor. The system's response options are configurable to ensure that the appropriate level of review and interaction takes place. For instance, the system can be customized to reply to the research staff or directly to the requestor.

"Harnessing content via API is a huge topic for legal librarians at the moment but they often don't have the access to software developers to build the necessary integration. Interfacing to CourtLink is an excellent opportunity to provide this automation to TRG Screen's & Lexis' mutual customers so they get all of the benefits of the integration without any of the overhead of having to build it themselves.

**Richard Mundell, Chief Product Officer at TRG Screen**

## The Results

THE TEAM SUCCESSFULLY IMPLEMENTED A NEW PROCESS THAT SIGNIFICANTLY STREAMLINES AND IMPROVES EFFICIENCY IN FULFILLING THESE REQUESTS. THIS IMPROVES THE RESPONSE TIME IT TAKES FOR REFERENCE LIBRARIANS AND ATTORNEYS TO GET ACCESS TO CRITICAL SOURCES OF INTELLIGENCE. THE TOOL WAS ROLLED OUT IN PHASES, STARTING WITH ACCESS TO REFERENCE LIBRARIANS WHO WERE RESPONSIBLE FOR VERIFYING THE DOCUMENTS RETRIEVED. THE ENTIRE JACKSON LEWIS KNOWLEDGE MANAGEMENT AND LEGAL RESEARCH TEAM WAS INSTRUMENTAL IN TESTING AND REFINING THE NEW SYSTEM. ONCE THE SYSTEM WAS VETTED, A FORM WAS CREATED TO ENABLE ATTORNEYS TO SEND REQUESTS DIRECTLY TO THE SYSTEM.

The implementation of this new system has had a significant impact, resulting in an extremely high accuracy rate in retrieving documents. The Jackson Lewis Knowledge Management and Legal Research team is continually working to make improvements to the system and their processes. In this endeavor, the firm is collaborating with LexisNexis and TRG Screen, and exploring other ways they can continue to work together to provide attorneys with reliable and accurate information quickly.

By working closely with LexisNexis and TRG Screen, the firm is continually seeking ways to refine the system and enhance its capabilities, so it can remain an effective tool for reference librarians and attorneys alike. Overall, the implementation of this system has demonstrated the power of technology in enhancing the efficiency and effectiveness of legal research and has set the stage for further innovation in the field.

## About TRG Screen

TRG Screen is the leading provider of software used to monitor and manage subscription spend, usage & compliance across the entire enterprise.

TRG Screen is uniquely positioned to offer the full spectrum of enterprise subscription management capabilities across:

- Spend management – Optimize Spend (inbound licensing)
- Usage management – ResearchMonitor (online resources, applications & terminals) & Xmon (data feeds)
- Enquiry & workflow – Quest
- Exchange compliance & reporting – AXON
- Revenue management – INFOmatch (outbound licensing)
- Managed services & professional services

TRG Screen is differentiated by its ability to comprehensively monitor both spend on & usage of data and information services including market data, research, software licensing, and other corporate expenses to optimize enterprise subscriptions, for a global client base.

TRG Screen's clients realize immediate ROI and significant long-term cost savings, transparency into their purchased subscriptions, workflow improvements and a higher degree of compliance with their vendor contracts.

Our global client base consists of more than 500 financial institutions, law firms, professional services firms and other blue-chip enterprises that jointly manage more than \$9.6 billion of subscription spend using TRG Screen's software solutions.

TRG was founded in 1998 by a group of financial technology executives passionate about helping firms manage their high value data subscriptions.

In October 2016 TRG acquired Priory Solutions adding powerful usage tracking solutions to our portfolio of solutions.

We further strengthened our position as a market leader in enterprise subscription spend management when TRG acquired Screen Group in January 2018.

In June 2019 AXON Financial Systems, the leading provider of exchange policy and compliance solutions, joined the TRG Screen family. The combined TRG Screen business provides a truly unique global offering.



**TRG Screen**

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