

Solving an IP Practice Business Need with Patricia

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In January 2003, Duane Morris recognized a need to provide a better IP docketing system. The new docketing system needed to be user-friendly and give users the ability to create reports quickly and efficiently. It also needed to provide a flexible solution for incorporating the dockets of lateral hires during the firm's growth cycle and to integrate the firm's nine separate IP docketing databases into a master database. Finally, it was vital that it work well within the firm's existing infrastructure.

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Together, we named a new docketing system committee, which consisted of five IP partners, two IP docket clerks and five Information Services ("IS") representatives. With the stated goals in place and the committee named, the software selection process began. With input from the IP partners and after a month-long search, the firm's IS representatives identified five potentially suitable IP docketing systems.

Formal presentations to the committee were arranged with the five, which were of tremendous benefit to the committee and a learning process for both the partners and the IS professionals. The partners learned how the latest technologies could help them manage their practice better, provide better cost controls and streamline their workflow. At the same time, the IS professionals learned the daily tasks of the IP group and were able to clarify what software functionality might be appropriate. By the end of the summer, the requirements grew from the original five to the following well-defined ones:

1. Implement a comprehensive, flexible and scalable IP docketing system with a standardized database engine that included a built-in workflow;
2. Provide letter creation capability

using the firm's document management system (InterWoven®) and its letter macros (Payne®) to quickly create, store and retrieve letters;

3. Provide easy user access to the firm's contact management system (InterAction®);
4. Provide a solution for financial reporting, payment disbursement and cost recapture that integrated with the firm's accounting system (Elite®);
5. Integrate the docketing system with the firm's New Case® process within Metastorm®;
6. Ensure that the system performed well for the firm's then-21 offices across the United States through Citrix®; and
7. Select a company willing to "go the extra mile" to provide these integrations and to assist us on a going-forward basis in converting the dockets for lateral hires who would bring their dockets with them.

Once these goals were stated, there were two software vendors in final contention. A second formal presentation by each was made to the committee. These sessions were a day-long intense exchange of ideas and possible solutions.

In late August, the firm chose Patrix and its product, Patricia®. Mehrdad Assadi, Patrix' CFO, was

named Project Manager. Deborah Warner was named the Patrix liaison to the firm and Ewa Matteson of Patrix was charged with handling the data conversions. Assadi and the committee recognized this was going to be a significant undertaking, so a two-day planning session was held in late August to finalize the Project Plan and the Data Conversion Manual. These team members were key players because of the breadth of integration that was planned and because the firm had nine different dockets it was managing. Each integration element was addressed separately at these meetings and stakeholders from the Accounting, Records Management, Marketing and IS (for Interwoven, Payne, SQL, rollout and training) were named. A rollout date of Feb. 17, 2004 was set.

In September, the Patrix contingent spent a week at Duane Morris and met with the department stakeholders, along with the IS committee members. At that time, the integration with each of the software applications — Elite, InterAction, InterWoven, Payne, New Case, Citrix — was detailed. Potential problems and technical issues were discussed along with possible solutions for each. The game plan was put in place.

Each of these integrations had its own challenges. For Elite and New Case, it was necessary to devise a way to:

- Let the users make payments to foreign associates through Patricia and capture those expenditures in the firm's accounting system;
- Let the users make payments to the Patent and Trademark

offices through Patricia and capture those expenditures in the firm's accounting system;

- Provide a utility to synchronize Patricia records with the accounting records in Elite via a unique identifier;
- Provide a method to populate both Patricia and Elite with client/matter information when a new case or new matter was opened; and
- Enable disbursement tracking for reconciliation and cost recapture.

For InterWoven, Payne and InterAction, the challenge was to provide an integration that would enable the users, while in Patricia, to:

1. Create a user-specific, office-specific letter from a template (Payne) that was populated by the user's selection of contact information from InterAction;
2. Populate it with the pertinent information from the Patricia database records; and
3. Automatically store it for later search and retrieval in InterWoven.

This complex integration ballet was accomplished by making use of APIs provided by each software vendor enabling integration objects to be accessed and operated within the Patricia GUI (Graphical User Interface) acting as native Patricia functions. Once again, this allowed us to provide a solution where users could operate in one unified environment for all daily tasks.

Finally, a conversion utility had to be written to bring in the nine datasets into the master Patricia database. To make the transition from the previous IP software to

Patricia successful, the conversion task was identified as the major single milestone. In order to make the conversion efforts efficient and reduce project delay, Patrix developed a custom conversion tool capable of handling the diverse databases. The conversion tool had the ability to load all nine datasets into one centralized Patricia database. The conversion tool loaded all nine datasets in one task and each data set had its own conversion definition parameterized in the software. This approach allowed the IP group to load the Patricia database with the old data as they completed data cleaning tasks with limited technical overhead. In the final analysis, this collaboration has resulted in helping Duane Morris meet the needs of its clients more efficiently than ever before.

The use of Patrix has allowed the firm to offer a centralized and continually evolving IP docketing solution. The service has received favorable feedback from both attorneys and clients since its inception and has made the firm more competitive in the legal marketplace and better able to serve and anticipate its clients' needs in the future.