IT @ Burnham Brown: Constructing a Database

By Eloisa Manglicmot

Burnham Brown, based in Oakland, Calif., offers an environmental practice, where our 60 lawyers defend hundreds of asbestos and other multidistrict cases. We handle multiple cases for multiple clients, including Borg-Warner Corp., Golden Gate Drywall Inc., and NIBCO Inc.

Defending multi-district litigation, especially asbestos cases, is far more complex than run-of-the-mill litigation, and requires much more sophisticated case management software. Our cases typically involve events that occurred over years, and each case is apt to be intertwined with a number of other cases. A retired construction worker may have worked at a dozen construction sites where a variety of different asbestos products were used. His or her litigation will likely involve several insurers and multiple jurisdictions. During the course of a case, lawyers come and go and jurisdictions change requirements. Even the disease may progress in unexpected ways.

Getting all this data into a database is not enough. The information must be accurate and readily accessible. Litigation teams must have all of the information at their fingertips and be able to identify critical relationships across a number of cases. They must also be able to provide current reports to clients on active and settled cases, settlement costs, status changes, etc. In addition, when users enter revised information, the data must correct automatically across the system.

To handle this data, we developed an in-house database, using Microsoft Corp.'s Access software. But by 2004, the database was becoming overloaded and a challenge to maintain and enhance. For example, much of the critical information about a particular plaintiff's case appeared in many different locations in a variety of contexts. The mass of information, much of it redundant, clogged our database and slowed its process- ing speed.

Our clients expect detailed reports, from different perspectives, and obtaining that kind of detail was becoming problematic. Even the normal turnover among lawyers and support staff added to the complexity. When one attorney left, the incoming attorney would typically bring new ideas of how the information should be handled. In response, our IT department, with five staff members, was constantly creating new custom fields and building new reports and databases.

As the new fields were created, users expected that prior information would still be available, and were frustrated when new fields were not automatically populated. There was endless tweaking to make the system work better; yet, despite all the effort, the system simply was not up to the job and challenges.

We realized that what we needed was a relational database that could handle virtually an unlimited amount of information at lightning speed. We did not see anything on the market that met our needs, so we created our own SQL relational database.

The advantage of a relational database is that critical information, such as the names of plaintiffs, insurers and defense attorneys, as well as addresses and phone numbers, can be captured a single time in a series of tables, rows, and columns.

For example, if a plaintiff's lawyer is involved in a dozen cases that we are defending, that lawyer's name and other key data is stored in just one location and "related" to the other places where it would normally appear. As a result, information that would be repeated throughout a flat-file database dozens, even hundreds, of times appears just once in a relational database, enabling the system to manage millions of records without degrading its processing speed.

In theory, the SQL relational database was just what we needed. When we put it to the test, some of the tables failed to index properly and we kept getting inconsistent results.

During the time that we were creating and trying to de-bug our database, a number of new case management software packages came onto the market and some older ones were upgraded.

A committee, which included the IT department, partners, and users in the practice group, researched this software intensively and came up with two that looked promising: Thomson Elite's ProLaw (www.elite.com) and CaseManagerPro, from Solutions in Software Inc. (www.casemanagerpro.com).

We showed both to our lawyers, paralegals and other legal professionals and explained the strengths and weaknesses of each. We eventually opted for CaseManagerPro, a relational software system originally designed for plaintiffs' attorneys handling mass tort litigation. It offered the relational capabilities we needed and just required a bit of tweaking to shift it to the defense perspective.

It encompasses all of the things that we would have liked our Access database to do — ease of use, multi-level relationships of records and data, and an open architecture which lets us customize views and reports.

We rolled out the new case management software in the spring of 2005, using a SQL server with 2 GB of memory and a 100 GB hard drive. The same SQL server hosted three other databases. Installation took about three months; most of that time was spent mapping out and testing the system.

The cost of the system was under $50,000, which included software and installation costs.

Our lawyers, paralegals and support staff learned the system quickly. Navigation of the system is largely intuitive, with icons, related hyperlinks, search screens, and other tools helping users move quickly from one location to the next.

During the first month, users called IT frequently with questions, especially about how to gather data for creating reports. After that first month, calls to IT became less frequent. We now field about five to 10 calls per month, compared to the same amount in a week before we installed the new software. Most calls are asking for help on creating queries and reports, rather than reporting a corrupt database.

The most noticeable gain has been in our ability to download information into reports for clients. CaseManagerPro comes with a report tool that makes it easy to export the report data into Excel. We massage the reports a bit in Excel and then transmit them to our clients. Because the database is also the working area, the information in the database is always current.

For example, if a client asks for a report on some aspect of its litigation, we can meet that request quickly with information that is accurate and timely. Several clients have told us that they are impressed by how we can now quickly respond to their requests.

The legal teams also have expressed their appreciation that the system creates custom fields quickly, and without destroying previous fields or losing data.

Because the system is web-based, our users can access it remotely, and our information is secure. We installed both network and application security, with access requiring both a user I.D. and a password.

We also restrict what users can do with the data. For instance, some paralegals can edit and delete information, while others have read-only access.Because of the complexity of multi-district litigation, our litigation teams are constantly

asking for new capabilities. We work with CaseManagerPro to enhance our program and resolve user issues.

Down the road, we anticipate extending the case management system from our environmental group to our other practices. We think that using the same systems across the firm and integrating all of them will provide the greatest efficiency. We also feel that technology such as CaseManagerPro gives us a competitive advantage against our larger competitors. One advantage of being a smaller firm is that we are flexible enough to improve our technology quickly. At the end of the day, this equates to providing services to our clients efficiently, and therefore, more cost-effectively.

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