

2011 CIO ROUNDTABLE RETREAT

Architecting Our Future

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eSentio
Technologies



Enterprise Search

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Agenda

- Introduction
- Strategy
- Business drivers
- Practical Considerations
- What is Enterprise Search?
- 3 enterprise solutions
- Lessons Learned
- A Look Ahead at Search



Strategy

1. Identify Key Business Goals and Processes
 - What are problems are we solving?
 - What are the risks of doing nothing?
 - Who are the constituencies and stakeholders?
 - What constitutes success? (Measureable ROI?, Clear user satisfaction?)
2. Inventory Current Products and Solutions
 - What current products can be leveraged?
 - What tactical or political landmines exist?
3. Compare Technologies/Features
 - What are the gaps in the current products and vendor's offerings?
 - How meaningful are these gaps? (Do users see them as important?)
4. Focus, not on the “Best Tool”, but on the “*Right* Tool for the *Right* Job”



Business Drivers

- Different business cases for using search require different technologies
 - What are the business cases?
 - eDiscovery
 - Conflict Identification/Resolution
 - Expertise Identification
 - Work Product Retrieval
 - What value does the solution bring to the firm?
 - Regulatory Compliance
 - Responsiveness
 - Improved Customer Support/Satisfaction



Practical Considerations

- Understand the benefits of competing choices
 - Search and Find Experience
 - The right results at the right time
 - Results that lead to further refinement
 - Leverage Existing Infrastructure
 - Ease of use
 - Quality of results
- Insist on a way to measure that value
 - Is there one, compelling business driver that stands out and trumps the rest?
 - Discrete solution
 - Should they all be taken together and evaluated as a set?



Microsoft Sharepoint and FAST

The Bewildering Array of Microsoft Search Products:

- Microsoft SharePoint Foundation 2010 Search - single site collection
- Microsoft Search Server Express - free, limited to single DB & App server
- Microsoft Search Server 2010 ~ 100 million items
- Microsoft SharePoint Server 2010 ~ 100 million items
 - Adds taxonomy
 - Social Networking integration
 - Managed Taxonomy
 - User-generated Tagging
 - Federated Search
 - People and Expertise



Enterprise Search

- Enterprise Search is not a 'Search Engine':
(according to them)
 - Conceptual Search
 - Metadata
 - Controlled Vocabulary
 - Parametric
- These features have different relative values depending on the goals and business drivers.



Microsoft Sharepoint and FAST

The Bewildering Array of Microsoft Search Products (cont.)

- FAST Search Server 2010 for SharePoint ~ Billions of items
 - All of the features of the above plus...
 - Extract and create metadata
 - Conceptual Search
 - Deep Refinement (MS version of faceted search)
 - Extreme Scale
 - Similar Results



FAST

- Key things to know:
 - Keyword based search with “Conceptual Search” options.
 - SharePoint sites are it’s native interface, so it feels like a web search engine.
 - Scales like crazy. Server farms scale out in rows and columns where more rows mean more query processing ability and more columns mean more indexing and content processing.
 - FAST Servers can be clustered and in a SharePoint environment can search against multiple SharePoint farms.
 - Other FAST products like FAST Search for Internet Sites and FAST Search for Internal Applications cloud the picture of where Microsoft is going with search



Recommind – CORE

- CORE (Context Optimized Relevancy Engine) platform
 - Each search result is customized for the user based on the context of the user.
 - Robust security.
 - Based on the CTO's work in Predictive Latent Semantic Analysis.
 - Develops an 'understanding' of a user's tacit knowledge based on previous submissions to the system and searches.



Recommind – Decisiv Search

- Decisiv Search is Based on Recommind's CORE Platform
 - Supports Concept, Keyword, Boolean, and Natural Language searches.
 - Displays information from multiple sources to provide context for results .
 - Search term highlighting.
 - Can be configured to return results from different versions (last or most relevant).
 - Add on modules for Matters & Expertise and for Microsoft Office integration.



Autonomy IDOL- IUS

- Solutions built on the IDOL (Intelligent Data Operating Layer) Platform.
- IDOL is a robust and flexible platform for indexing and processing a variety of content types.
- Handles keyword, conceptual, parametric.
- Large, financially strong, publically traded company with high R&D spend.
- Robust, established conceptual search engine.
- Tight integration into iManage WorkSite, Email and Records management.
- New application/interface (IUS).
- Manual/automatic and hybrid taxonomy and classification features enable firm to reduce the cost and effort to code, tag, and classify documents.



Product Selection

- The items that make great marketing and ad copy might not be the items that deliver the right value to the firm.
- Enterprise Search products have become Enterprise Search Platforms. Before investing, make sure the platform has a secure future.
- Ask “What are the applications and interfaces to the system day one?” How easy (or how costly) will it be to update, customize, and replace the interfaces?
- Consider the needs and future needs of mobile users.



Thoughts - implementation

- Audit all content and data repositories
 - Who owns this?
 - Who may be entering or modifying data?
 - What purpose is it used for?
 - What security issues are there?
 - What's the nature of the content?
 - What are the entry points?
 - What are the storage, support, and archival needs?
 - What new risks are present as a result of the social nature of this content?



Thoughts - implementation

- Identify a Stakeholder group who can make the decisions:
 - Which repositories will be indexed
 - Indexing rules (e.g. only client/matter documents; no estate documentation etc.)
 - Which documents get promoted to special (“Best Practices/Bets”) status
 - Will the interface be task or source orientated
 - Identify Use Cases
 - How will the project be phased
 - Is there a basic and an advanced mode?
 - What will the “Advanced” interface look like
 - How will multi-lingual documents be presented
 - Which version (or all) of DMS documents are in the Results List
 - Which date is used for the date histogram – created or last modified



Implementation Planning

- Security
 - Begin clean-up / awareness of DMS security early (very early).
 - Address ethical wall and conflicts, and document the procedures for identifying and dealing with them.
 - Consider “lag” between changes in source ACL and reflection in index.
 - Test and retest prior to go-live using a very low-level access account for common searches e.g. “partner compensation”.
- Consider jurisdictional constraints on exporting documents.
- Consider FTE count (re-tasking / new) for post-implementation communication, care, maintenance, monitoring, tweaking.



Implementation Planning

- Communication & expectation setting are key
 - Terms like “natural language” or over selling “conceptual” without robust use cases and example may set unrealistic expectations.
 - Consider the labels on the interface and how attorneys will respond to them.
 - Phase deployments - small achievable wins to build momentum.
- Plan for post roll-out communication and selling
 - Targeted communications / selling based on usage metrics.
 - User stories more compelling than you.
 - Email alone is not enough.



A Look Ahead at Search

- Focus on ease of use and usefulness of results
 - Too many irrelevant results will annoy users
 - Too many results will overwhelm users
- Social media – Will we see expertise identification based on tweets?
- Does FAST for SharePoint present a roadmap for Microsoft's future DM dominance?



Discussion

