

# Checklist for your Enterprise Search Project

These are the tips you should follow

## DATA

### What is to be searched?

- Which data sources should be connected?
- Which languages should the search support?
- How much data will be in the index?
- How will the data growth develop?
- Should it be a stand-alone search?
- Or should the search be integrated into an existing system?
- Are there already search solutions in the company?
- Is the metadata maintained?
- Are there one or more thesauri, lists of synonyms, etc.?
- Are there any special circumstances?

## USERS

### Who should use the search?

- How large is the user group?
- Should there be different user groups?
- Should the search be integrated into an existing system?
- Are there any special requirements?

## REQUIREMENTS

- ### How should the search be used?
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Search projects either arise from the needs of a business department or are driven by the IT department. Three things are crucial for the successful implementation of an enterprise search application: the **users**, the **data** and the **requirements**.

Regardless of the technical basis on which the search engine is running, of whether many or few data sources are connected, of whether there are a thousand or a million documents in the index - nothing works without the user. No matter how good the search engine product may be - if the users cannot use it intuitively and their specific requirements are not met, acceptance is lacking and every enterprise search project is doomed to failure. Therefore, you should follow these tips.

## Focus on the user

The user and his needs must be at the center of attention for the enterprise search project to be a success. It is not enough to simply convince the manager to provide budget for the search application. Before you consider such a project, you should contact the various departments and talk to your colleagues - the users - and also get the IT department on board. The better you know the users and the more you know about their daily work, the better you are able to define the requirements and create user stories with real benefits.

Consider the different search scenarios: There will be so-called power users who will use the search every day and may even set up a search dashboard as their personal home page in the browser. In contrast, there will also be users who use the search only occasionally. And there are the many users who integrate the search function into their daily work routine, just as they use an Internet search engine for research in their private lives.

An important aspect for the planning of an enterprise search project is the examination of the rights on the file servers when including file server databases. Copying or moving directories can cause problems with Windows file shares, as directory and underlying document rights are not inherited correctly. Documents can then be found

using the search function, even though the user may not have read permissions on the higher-level folder. A good search engine, however, will display the corresponding directories during this initial cleanup process, making it easier to correct the rights violations.

Please also do not forget to include the works and staff council in your considerations at an early stage and to ensure the necessary support from this board.

## The enterprise search solution should be scalable

When it comes to the data sources to be connected, also consider that new data sources - especially cloud-based ones - may play a greater role in the future and that the data volume usually grows considerably over the years. So make sure that your enterprise search application is scalable and „grows“ with your data. Since only the data that is included in the index can be found, indexing should be re-initiated as often as possible. The more connectors that can work using the push method, i.e. with very fast near-realtime updates, the better.

For companies that are represented in different countries, different languages play a major role: In which language are the documents available? Which language is spoken by the employees? Which language should the search application support? The different locations must also be taken into account.

## Our advice: Start small.

First index only a limited amount of data, e.g. only parts of your file servers, and then test the search in a small group of colleagues. After you have made good experiences with it, you can always use other data sources and roll out to all colleagues. As soon as the search is fully productive, you ensure that the entire group of colleagues is informed, so that the employees quickly benefit from the new search. Inform all colleagues with a small internal marketing campaign and get everyone on board!

## Your checklist with the most important points to consider when introducing an enterprise search application:

### Data

#### What is to be searched?

- Which data sources should be connected?
- Which languages should the search support?
- How much data will be in the index?
- How will the data growth develop?
- Should it be a stand-alone search?
- Or should the search be integrated into an existing application?
- Are there already search solutions in the company?
- Is the metadata maintained?
- Are there one or more thesauri, lists of abbreviations, etc. in the company that can be connected under certain circumstances?

### Users

#### Who should use the search?

- How large is the user group?
- Should there be different search profiles for different user groups?
- Should the search also be rolled out to different national companies?
- Are there specific, sensitive, or personal data that must not be searched for and should not be found?

### Requirements

#### How should the search be used?

- Which stakeholders must be involved (works council, IT security, data protection)?
- What are the requirements regarding servers, support, and licenses?
- How often should the index be updated?
- What are the requirements regarding the frontend? Does it have to be adapted to the corporate design?

#### Why should the search be used?

- What benefit is to be achieved with the search?
- Which departments will use the search particularly frequently?
- In which scenario will the search be used? Knowledge Worker at the PC, mobile or both?

#### When should the Enterprise Search application be ready for productive use?

- Who do I need to contact to get the necessary technical users for indexing?
- What is the timetable for implementation? What deadlines must be met?
- Should the search be implemented by the IT department itself or by an external service provider?

## What should enterprise search software offer?

No matter if you want to improve your customer service, facilitate the access to information for your employees or if you are obliged to thoroughly clean up your database in the course of a migration to a new IT infrastructure – an intelligent enterprise search software is suitable for every scenario. It helps employees to search and find data and furthermore, as a cognitive search, it offers additional possibilities in the area of document analytics. It is an important component for the digital workplace and a fundamental building block in effective knowledge management.

When choosing software, pay attention to the following features and attributes:

**Easy implementation:** Ensure that the solution is enterprise-ready and has a high cold start capability during installation. This way, for the introduction, you do not have to plan an expensive IT project.

**Comprehensive search:** Searching in several hundred data sources and file formats should be possible without any problems.

**Real-time search:** For users of NetApp file systems: Ensure that your enterprise search product offers a vendor-certified solution for searching NetApp file services and can process changes in NetApp file systems immediately and without delay.

**Secure search:** Make sure that the respective user rights are taken directly from the Active Directory. This ensures that users only find the documents for which they have authorization.

**Multitenant capability:** The enterprise search solution should be able to be rolled out to several tenants. Subsidiaries or departments can therefore access different indices - within a single installation.

**Various UIs:** No matter if knowledge worker, mobile service technician or occasional user - the solution should provide the appropriate user interface for each requirement.

**Customized hit lists:** Ensure that the software delivers customized hit lists based on boosting factors, best bets, and individual search profiles for different user groups, with the relevant search hits displayed at the very top.

**Linguistics:** Make sure that your future solution offers linguistic features such as composite decomposition, lemmatization, and multi-language support. This way, you ensure that users always see the relevant documents they are looking for.

**AI-based metadata optimization:** To make data easier to find, metadata such as author names, keywords, tags, etc. must be complete. A good solution should be able to automatically enrich existing data with relevant metadata and, for example, classify it into predefined subject areas.

### Your benefits:

- + **Greater efficiency:** Faster finding of information ensures efficient work. The employee no longer wastes valuable time searching.
- + **Faster response times:** Targeted information retrieval enables faster response times and answers, thereby increasing customer satisfaction.
- + **More security:** In the course of the fileshare analysis, breaches in access rights concepts can be detected.
- + **Increased knowledge:** Information is not lost in random drives but can be found from a central point.
- + **Less risk:** A comprehensive search minimizes the risk of missing essential information.
- + **Reduced costs:** By working efficiently, resources can be used optimally.
- + **More fun at the digital workplace:** New employees can be trained more quickly and benefit from existing knowledge. They are provided with a search engine with all the functionalities they are used to from their private everyday life - only better.



## CONCLUSION

All these advantages contribute to a measurable **return on Investment (ROI)**. A smart search application usually pays off within a few months.

**Do you have questions or an individual use case you would like to discuss? Please do not hesitate to contact us.**

### **IntraFind – your reliable partner for companies and public authorities**

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