

#findbetter



Expert Tips for Successful Projects

Checklist for AI-Powered Enterprise Search and Secure Generative AI for Intelligent Chatbots

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- A close-up photograph of a checklist on a clipboard. The clipboard has a wooden frame and a green cover. A black pen is resting on the paper. The checklist items are:
- Which...
 - How much data...
 - How will the data growth develop?
 - Should it be a stand-alone search?
 - Or should the search be integrated into an existing search support?
 - Are there already search solutions in the company?
 - Is the metadata maintained?
 - Are there one or more thesauri, lists of terms, or other resources under certain circumstances?

USERS

- Who should use the search?**
- How large is the user group?
 - Should there be different user groups?
 - Should the search be tailored to different user groups?
 - Are there specific requirements for different user groups?

REQUIREMENTS

- How should the search be implemented?**
- Which search engine?
 - Which search interface?
 - Which search results format?
 - Which search filters?
 - Which search sorting options?

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

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.

Focus on the user

The user 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 there are also users who repeatedly integrate the search function into their daily work as a complementary tool — much like they use internet search engines for private research or consult AI chatbots.

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 such as iFinder, 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.

Scalable enterprise search application

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 - take this into account in your planning. 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!

Enclosed you will find a **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?

Should generative AI be used, and how do you plan to implement it?

- Should generative AI be available for answers, summaries, etc.?
- Have your teams already defined the specific use cases?
- Are you looking for question answering in combination with enterprise search, or is your focus on a conversational chatbot?
- Do you have the capability to operate your own GPU hardware?

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 (IntraFind)?

Why iFinder?

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 - IntraFind's iFinder is suitable for every scenario. With iFinder you get an enterprise search application that helps you to search and find information - also in the form of answers and summaries. Furthermore, by providing deep insights into the data, it enables additional applications in the field of document analysis. The iFinder is a key component of the digital workplace and an essential element of effective knowledge management.

Easy implementation: iFinder is enterprise-ready and has a high cold start capability. For the introduction, you do not have to plan an expensive IT project.

Comprehensive search: Supports search in hundreds of data sources and over 600 file formats.

Real-time search: With iFinder IntraFind ist the only search provider to offer a NetApp certified solution for searching in NetApp file services. Changes in NetApp file systems are processed in iFinder immediately and without delay.

Secure search: The respective user rights are taken from Active Directory. Users only find documents for which they have authorization.

Multitenant capability: iFinder can be rolled out to several tenants. Subsidiaries or departments can therefore access different indices - within a single iFinder installation.

Various UIs: No matter if knowledge worker, mobile service technician or occasional user - the iFinder has the right user interface for every requirement.

Customized hit lists: Based on boosting factors, best bets and individual search profiles for different user groups, customized hit lists can be delivered, with the relevant search hits displayed at the very top.

Generative AI: In combination with the IntraFind tool iAssistant, iFinder enables AI-generated summaries and answers from your data, ensuring they are delivered in a rights-checked and data protection-compliant manner.

Linguistics: Extensive linguistic features such as composite decomposition, lemmatization and multi-language support ensure that users always see the relevant relevant information they are looking for.

Low operating costs: iFinder scores with low operating costs.

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).

The search application usually pays off within a few months. We would be happy to show you a demo of how iFinder works in real life and discuss your individual use case.

Interested? Please do not hesitate to contact us:

IntraFind – your reliable partner

IntraFind is an established software vendor for intelligent, AI-based search and text analytics with 20 years of product and project experience. 1000 satisfied end customers and several million daily users in companies and public authorities speak for a mature solution. Renowned analyst firms list IntraFind among the world's leading search and analytics software companies.

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