NetDocuments and BA Insight

Better Together

The Intersection of AI-Driven Search and Document Management

For today's law firms, professional service providers, real estate organizations, corporate legal departments and financial advisement firms to be productive, access to information should be a core strategic objective, and "getting it right" is key to maintaining a competitive edge. Organizations that provide access to relevant information to their teams when and where they are needed will increase their productivity, allowing them to provide better service and thus outpace their competitors.

There are three key capabilities that must be available for the teams in the above industries to be productive:

1. A robust and secure document and email management system.
2. Advanced, AI-driven enterprise search providing users the ability to quickly find information that resides in other business systems.
3. Ability to work in the applications they use every day, such as NetDocuments, Outlook, Microsoft Office, and browsers.

To provide the capabilities needed, the combination of NetDocuments and BA Insight provides a "better together" integrated solution that:

- Delivers a single source of truth for document management/creation and enterprise search, providing easy access to information that resides outside DMS.
- Enables users to seamlessly and securely access information from other enterprise systems in an internet-like manner, directly from within NetDocuments.
- Integrates autoclassification technologies to automatically tag content with high-quality metadata to deliver a better search experience, meaning the right information is delivered to the right person, at the right time.
- Provides an experience that is personalized, relevant, and mobile-ready.

This enables organizations across the globe to improve workplace productivity while reducing costs and complexity. Users have access to a unified view and only have to "look in one place" to find the information needed to do their jobs, making their day to day work more efficient.

The combined solution powered by NetDocuments and BA Insight is different from other search systems available today (i.e. SharePoint, iManage RAVN, Recommind, etc.) because delivering what can be described as "basic search" is just not enough in a world where information is key to the success of a knowledge-driven organization.

About NetDocuments

NetDocuments is a multi-product cloud platform that offers a robust document management service letting users easily collaborate on, share, and govern documents directly in the applications they use most. The simple and secure content services platform provides a single source of truth for document management and creation.

About BA Insight

BA Insight is the leader in providing open, AI-driven enterprise search solutions. We help organizations achieve digital transformation by enhancing the findability of critical information, bringing internet-like search across enterprise assets with our modular, scalable software. Our approach enables organizations to leverage their preferred search engines and AI platforms to provide employees with personalized and relevant search. Our software is helping millions of users worldwide, including at customers such as Apache, BearingPoint, Blizzard Entertainment, Chevron, DLA Piper, Duke Energy, KPMG, Nvidia, and Vodafone.

BA Insight is a Microsoft Gold Certified Partner, a member of the Microsoft Enterprise Cloud Alliance, and an Elastic Partner. For more information, please visit our website at www.bainsight.com, e-mail us at sales@BAinsight.com, call us at +1.339.368.7234, or follow us at @BAinsight.

The Key Combined Capabilities

BA Insight for NetDocuments extends the existing capabilities of the NetDocuments platform by integrating and delivering AI-Driven enterprise search incorporating Best of Breed AI, Machine Learning, and Cognitive Services to make search work better.

- **Personalized**

  Delivered within NetDocuments and powered by BA Insight's SmartHub, the following capabilities are enabled:

  - ✓ **Bot**: Users quickly become frustrated when their searches yield no (or too many) results. Our Bot can detect these situations and provide assistance. It may leverage analytics data to suggest a query previously executed by other users, suggest removal of a filter, or suggest a more restrictive query depending on the situation.

  - ✓ **Natural Language Query**: Enables your users to find the information they need by making requests as if they were speaking to a person. This eliminates the need to learn complex query syntax in order to find the specific information you seek.

  - ✓ **Personalized and Relevant Information Delivery**: SmartHub's unique Intelligent Engine taps into each user's context to provide personalized dashboards and highly relevant results.

- ✓ **Machine Learning-Based Recommendations and Analytics**: Uses our SmartHub Analytics to surface recommendations and suggestions so that users have the information they need, when they need it.

- ✓ **Document Summary**: Knowledge of the meaning of a document is also used to generate a brief document summary. Through SmartHub, users can quickly review this summary to determine whether a document which appears in their search results is relevant to their current needs.

- ✓ **Similar Documents**: BA Insight's AutoClassifier applies AI-based linguistic analysis to determine the key concepts contained within documents. SmartHub leverages this information to deliver documents which contain the same concepts as those in the search result but do not match the user's query, thereby delivering additional highly relevant information to the user.

- ✓ **Type-Ahead**: As users begin typing queries, SmartHub will dynamically generate type-ahead suggestions of multiple types. Category Matches will search available metadata and suggest matching values, applying Machine Learning to analytics data to deliver suggested queries based on previous searches. Suggestions of People or Content results match what the user is typing. It is extensible for delivering suggestions of other types as well.

When coupled with BA Insight's ConnectivityHub and our 70+ connectors, enterprise search becomes boundaryless, providing equal access to all enterprise information to all users.

- • **Connected - Bring in content and intelligence from all your legal and enterprise systems**
  Our connectors are built on ConnectivityHub, our highly scalable, purpose-built platform designed specifically for developing connectors. It provides easy to deploy connectors to many industry-focused and enterprise systems. Customers can connect and integrate over 70 systems and provide secure, high performance crawling and indexing of data. Even the most complex and sophisticated security scenarios are covered, even extending to special security requirements, such as ethical walls in the legal industry. This list of connectors can be found here.

Highlighted Capabilities:

- ✓ **Smart Security Mapping:** powerful security integration across the heterogeneous security schemes used by different source systems. 'Early binding' security makes it possible to deliver secure, high-performance search solutions. AD-based systems benefit from automatic AD group binding; non-AD systems benefit from advanced security mapping that goes beyond the claims-based security of native search platforms.

- ✓ **Easy Administration:** automatic metadata mapping and an integrated Test Bench make it possible to rapidly deploy, configure, and test connectivity. Once deployed, crawling is monitored and managed transparently through familiar crawl management tools. Scheduled jobs for common tasks such as security sync, backups, and mailbox management enable straightforward administration.

- ✓ **Advanced Configuration:** through connections, content sources, items, and metadata it can be configured and extended to customize the content and tailor how search fields are populated. Custom scripting, using familiar syntax, can be applied to security, crawling, and metadata to handle even the most demanding applications.

- ✓ **Smart Metadata Mapping:** automatically maps metadata to search properties and provides dataset lookup to external sources in order to augment and normalize fields; a flexible metadata mapping facility; and a scripting capability that enables the manipulation of metadata fields. Associated crawls add supplementary information as content is indexed. For example, a fileshare may have an associated database holding metadata; both the file and the metadata are indexed as a single item using an associated crawl.

When coupled with BA Insight's SmartHub and AutoClassifier, all enterprise data becomes seamlessly integrated into the entire search experience, along with extensive content intelligence and alignment of metadata, ensuring highly responsive and accurate results.

- • **Relevant - Automated Document Classification and Extraction Software**

  BA Insight's AutoClassifier, which has been integrated with the NetDocuments enterprise search platform, uses AI technology to bring intelligence to your organization's content. It automatically analyzes, categorizes, and tags your enterprise content, transforming it into a valuable business asset.

  AutoClassifier modernizes the tagging process with an integrated AI-driven and rules-based approach that provides taxonomy management and entity recognition/extraction with Machine Learning and Cognitive Services from Microsoft and Google to power metadata creation, document summaries, image OCR, audio transcripts, and more.

  When coupled with BA Insight's SmartHub, the data intelligence created by AutoClassifier enables hyper accurate search results; personalized, predictive and proactive delivery of content to users; and a complete framework for data segmentation and analysis across all enterprise data.

  - ✓ **AI and Machine Learning:** AutoClassifier brings advanced capabilities that help users find information faster and surface automated intelligence about all content. Its primary AI integration points are around Natural Language Processing and Multimedia Analysis.

  - ✓ **Natural Language Processing:** capabilities include automatic creation of summarizations of key documents, identification of similar documents, and extraction of concepts found within the document.

  - ✓ **Image and Video Analysis:** capabilities include extraction of all text that appears with an image, extraction of all speech within a video, returning a text searchable transcript, identification of signatures within a document, extraction of images/videos from within documents, and identification of objects, locations, and activities captured with the images and video.

  - ✓ **Enhanced Control:** In situations where companies require more finite control to meet specific needs, AutoClassifier's rules-based tagging is utilized, which assigns concepts from a taxonomy or ontology to content automatically, through customer-defined rules. For example, content can be tagged when it matches concepts and has specified metadata. Matching can be hierarchical to disambiguate terms that may have different meanings in different contexts.