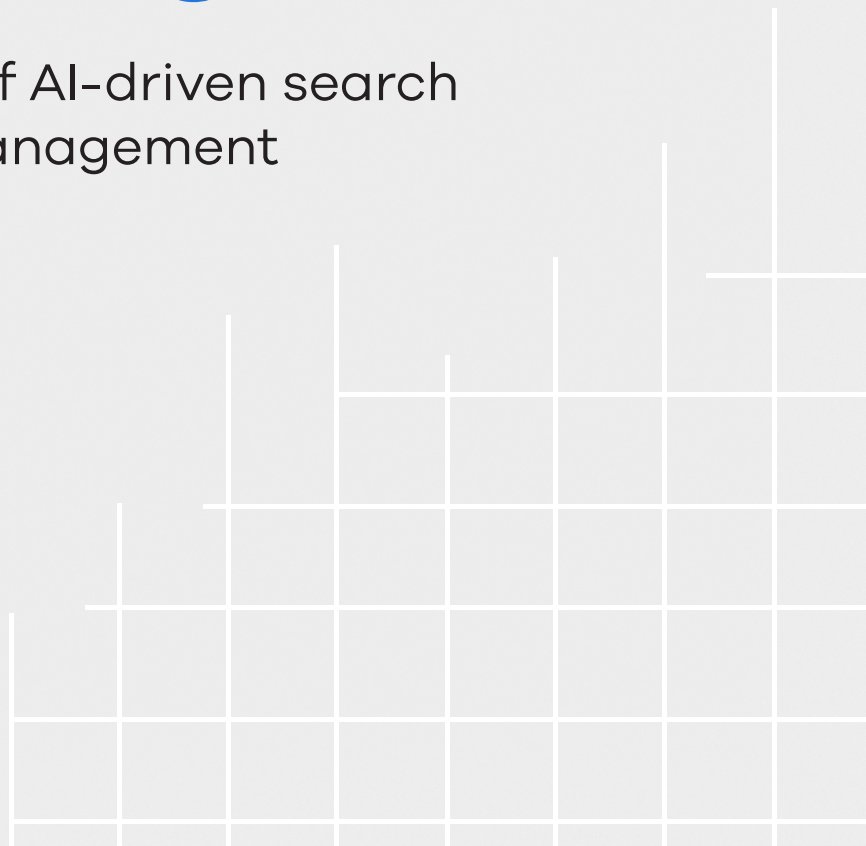BA Insight

NetDocuments and BA Insight: Better Together

The intersection of AI-driven search and document management
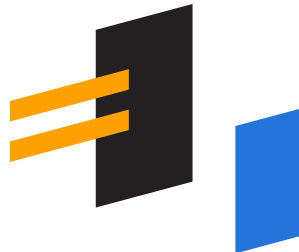
To be productive as a law firm, professional service provider, real estate organization, corporate legal department, or financial advsior, access to information should be a core strategic objective. Getting it right is crucial in maintaining a competitive edge.

Organizations that provide their teams with access to relevant information will increase their productivity, allowing them to provide better service and outpace the competition. Let's dive in to see where enterprise search comes in.

More than just a search solution

Upland BA Insight enables organizations across the globe to improve workplace productivity while reducing costs and complexity. Users can access a unified view and only need to look in one place to find the information necessary 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 not enough in a world where information is vital to the success of a knowledge-driven organization.

Three key capabilities must be available for the teams to be productive:

1. A robust and secure document and email management system

2. Advanced, AI-driven enterprise search allows users to find information that resides in other business systems

3. The ability for users to work in the applications they use every day, such as NetDocuments, Outlook, Microsoft Office, and browsers

NetDocuments and BA Insight delivers 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 the 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 experience that delivers the correct content to the right person at the right time

- Provides an experience that is personalized, relevant, and mobile-ready

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 the search process more user-friendly.

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 assist. It may leverage analytics data to suggest a query previously executed by other users, suggest the removal of a filter, or suggest a more restrictive query depending on the situation.

Natural Language Query: This enables your users to find the information they need by making requests as if they were speaking to a person, eliminating the need to learn complex query syntax to find the specific information you seek.

Personalized and Relevant Content Delivery: SmartHub's unique Intelligent Engine taps into each user's context to provide customized 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 used to generate a brief document summary. Through SmartHub, users can quickly review this summary to determine whether a document that 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 that contain the same concepts as those in the search result but do not match the user's query, thereby producing additional highly relevant information to the user.

Type-Ahead: SmartHub will dynamically generate type-ahead suggestions of multiple types as users begin typing queries. Category Matches will search available metadata and suggest matching values, applying Machine Learning to analytics data to deliver suggested questions 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.

Connected

When coupled with BA Insight's ConnectivityHub and our 90+ Connectors, enterprise search becomes boundaryless, providing equal access to all enterprise information for all users. Bring in content and intelligence from all your legal and enterprise systems. Our Connectors are built on ConnectivityHub, our highly scalable, purpose-built platform. It provides easy-to-deploy connectors to many industry-focused and enterprise systems. Customers can connect and integrate over 90 systems, providing secure, high-performance crawling and data indexing. Even the most complex and sophisticated security scenarios are covered, even extending to special security requirements, such as ethical walls in the legal industry.

You can find the complete list of connectors here.

Highlighted capabilities

Smart Security Mapping: This feature provides powerful security integration across the heterogeneous security schemes used by different source systems. Early binding security enables the delivery of 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 everyday tasks such as security sync, backups, and mailbox management enable straightforward administration.

Advanced Configuration: Through connections, content sources, items, and metadata, this feature 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: This feature automatically maps metadata to search properties and provides dataset lookup to external sources 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; the file and the metadata are indexed as a single item using an associated crawl.

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. All enterprise data becomes seamlessly integrated into the entire search experience, along with extensive content intelligence and metadata alignment, ensuring highly responsive and accurate results.

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

When companies require finite control to meet specific needs, AutoClassifier's rules-based tagging is utilized, automatically assigning concepts from a taxonomy or ontology to content 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 with different meanings in different contexts.

About NetDocuments

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

About BA Insight

BA Insight leverages AI technology to deliver a web-like advanced search experience with results that are relevant, personalized, and actionable. The connector-based technology works with enterprises, customer portals, and websites, turning searches into actionable insights, regardless of where content or users reside.

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