



# Upland BA Insight

Eliminate search fatigue for employees, customers, and website visitors. Let's dive in.

# Contents

**PG 03** Overview

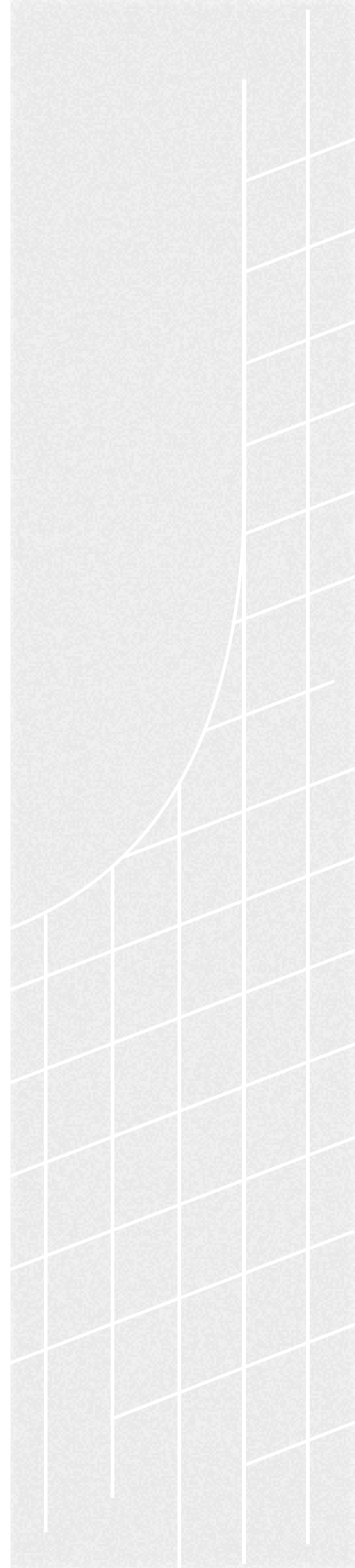
**PG 04** SmartHub

**PG 05** Connectors

**PG 06** AutoClassifier

**PG 07** Smart Automation

**PG 08** A few more benefits



# Give employees, customers, and website visitors a search experience that gets the right results.



**75%**

of employees feel that information is easier to find outside of their organization vs. within their systems



In our modern, technology-driven business climate, people are accustomed to having instant access to information as well as the ability to take immediate action on the information. They also expect intuitive search capabilities, where they can simply ask for what they need in natural language. However, the reality across enterprise applications, customer portals, and websites is far from that expectation, which wastes time and money and creates frustration.

Upland BA Insight transforms the outcome of digital interactions through advanced, web-like search experiences that are relevant, personalized, and actionable. Our search software works within enterprise systems, customer portals, and websites—turning searches into actionable insights, regardless of where your content or users are. BA Insight can be managed by us with our search as a cloud service, or organizations can implement and manage our software within your own environment. Out of the box, our user interface supports remote workers as it is optimized for responsive delivery on desktop or mobile devices, including phones and tablets.

Read on to learn more about BA Insight's products, including SmartHub, Connectors, AutoClassifier, and Smart Automation.

# SmartHub

Provide a user experience platform that integrates with AI technology to deliver a modern, web-like search experience.

## Natural Language Query

Users find the information they need by making requests as if they were speaking to a person, eliminating the need to learn complex query syntax in order to find specific information.

## Personalized and relevant delivery

SmartHub's unique engine and faceted search technology manipulate search results to provide personalized dashboards and deliver highly relevant results based on filters and classification.

## Machine learning

Machine learning and analytics work behind the scenes to precisely surface recommendations and suggestions to give users the information they need, when they need it.

## Document Summary

Generate a document summary to enrich search results. A short summary enables a user to learn more about it, gaining additional insight into whether it meets their needs.

## Document Preview

Simplify search evaluations by providing a preview of a document from directly within a search. View a hit map that highlights search terms and all the pages with the term. A graphical bar shows pages with the most relevant content.

## Analytics

Help understand how users are leveraging search, identify potential issues, and proliferate what is working through an extensive list of reports. Data captured through analytics can also be used to personalize search results and dynamically modify relevancy of results.



## Type-ahead suggestions

Receive type-ahead suggestions in multiple forms, including autocomplete for search terms, dynamically populated machine-learning generated matches for internal users with specific knowledge, and more.

## Admin console

Allow administrators to establish rules, add in-house acronyms or industry jargon, and further tune the system to enhance search relevancy.

## Configurable user interface

Access a flexible design that enables your team to fully customize their user experience—including your own corporate branding usage styles. We've made it easy to customize using widely known tools including HTML, CSS, and JavaScript.

## Find the right experts

Expert Locator quickly connects employees with internal experts to get ideas, advice, and answers that help them perform their jobs better.

## Support multiple platforms

Use one search engine or mix and match with Amazon OpenSearch Service, Azure Cognitive Search, Elasticsearch, Amazon Kendra, Microsoft Search, SharePoint Online, SharePoint On-Premises, or Solr to handle a wide range of applications.



# Connectors

Search across 90+ information sources using our ConnectivityHub to find just the right content for the task at hand.

## Smart security mapping

Provide 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. Active Directory (AD)-based systems benefit from automatic AD group binding, and non-AD systems benefit from advanced security mapping that goes beyond the claims-based security of native search platforms. Results are trimmed to expose only content the user has access to.

## Easy administration

Automatic metadata configuration and an integrated Test Bench make it possible to rapidly deploy, configure, and test connectivity. Once deployed, crawling is monitored and managed through ConnectivityHub's management tools. Scheduled jobs for common tasks such as security sync, backups, and mailbox management enable straightforward administration.



## Advanced configuration

Content sources and metadata can be configured and extended to customize the content and tailor how search fields are populated. Custom scripting using familiar Visual Basic syntax can be applied to security, crawling, and metadata to handle even the most demanding applications.

## Universal SQL Connector toolkit

Support secure indexing for any SQL-based source system with the flexibility to tailor the way database content is composed and transformed into indexed items. Swift, wizard-driven creation of custom connectors for sources enables development of new, fully secure connectors on demand with the flexibility to tailor content handling and metadata mapping.

## Smart metadata mapping

Automatically map metadata and provide dataset lookup to external sources in order to augment and normalize 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.

# AutoClassifier

See how automated tagging can deliver relevant first-page search results.



## AI and machine learning

Help users find information faster and surface automated intelligence about all content. BA Insight's primary AI integration points are focused on Natural Language Processing and Multimedia Analysis.

## Entity extraction

AutoClassifier recognizes provided terms, phrases, and regular expressions within content and assigns them to metadata properties. For example, users can extract numbers, project names, or customer names from a document. This feature can also be used for detection of personally identifiable information (PII), GDPR compliance, or for similar compliance and content auditing applications.



## Smart tagging with scoring and weighting

Take a rules-based approach to tagging with a powerful yet familiar full-text query language complete with Boolean, proximity, scoring, weighting, and fielded search capabilities. There are no "black box" algorithms, so users can understand and control how content is enriched and classified.

BA Insight provides finite control over the returned metadata to enforce rules around quality of hit vs. quantity of hit, ensuring that only the very best metadata for the document is returned. Rule-generation is scriptable and starts with intelligent defaults, minimizing the effort needed to maintain rules.

## Taxonomy management

Create and modify multiple taxonomies or ontologies using drag-and-drop simplicity to rearrange categories and edit category rules. Taxonomy information is stored and managed in a shareable format and is enhanced with new features to allow for auto-tagging. Easily import and export taxonomies from industry formats such as SKOS, RDF, CSV, and the SharePoint term store interchange format to enable the use of other taxonomy and ontology tools in combination with the BAI software portfolio.

# Smart Automation

Take advantage of API-led connectivity to make search truly actionable.

## Intelligent automation

Dispatch intelligent, automated APIs to perform actions and complete entire workflows.

## Integration of systems

Integrate all of your cloud-based/on-premise systems, regardless of whether they have APIs.

## API-first strategy

Expose RESTful Open-API endpoints across all your systems with no APIs, limited APIs, and open systems. Easily create deep integrations across all such systems.

## Integrated with search

Enable users to quickly get to the data and information they need while also enabling them to complete entire business processes directly from within BA Insight's Digital WorkHub.

## Admin console

Smart Automation provides a friendly UI console for power users and integrators to utilize a Low-Code/No-Code drag-and-drop design studio to quickly create automations. Equally, IT staff, administrators, and developers can go one step further by utilizing the advanced capabilities to rapidly build highly complex and intelligent integrations.



## Centralized testing

Provide sandbox testing to visually reaffirm the quality of every automation and application integration during development before it is deployed into a production environment.

## Multi-platform support

Deploy wherever required with flexible deployment options, such as in your cloud, our cloud, on-premises, or a hybrid deployment.

## Endlessly scalable

Designed to be automatically scalable based on API load to deliver the most optimal user experience.

## Flexible deployment

Can run standalone or integrated with BA Insight's SmartHub to create Digital WorkHubs that provide microservices to automate tasks and/or activity streams across multiple systems, reducing the need to visit and interact with each one individually.



# A few more benefits of BA Insight's technology

We connect knowledge to knowledge seekers.

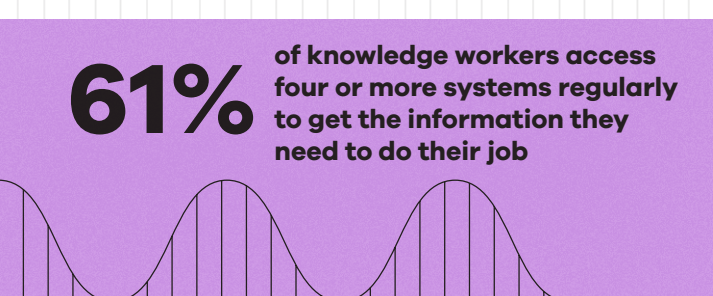


- Best-of-breed strategy enables you to select the search engine(s) and AI platform(s) of your choice
- Relevant, personalized results anytime —regardless of where users and the information reside
- Customer portal, website, and “In-App” advanced search takes your applications to the next level
- Fully scalable deployments whether you have 100 or 5,000,000 users
- Flexibility to host our software within your environment or have BA Insight monitor and manage it, freeing up your resources for other activities
- Low total cost of ownership with our no customization approach



*If I can save legal professionals even five minutes by helping them find similar work we've done in the past, or save them from having to do something from scratch, it helps us serve our clients more efficiently and improves the quality of the work. This is why to us, search is so important.*

**Scott Mortenson**  
Knowledge Architect, Orrick Herrington & Sutcliffe







## **BA Insight**

Upland BA Insight transforms the outcome of digital interactions through advanced search experiences that are relevant, personalized, and actionable. Our connector-based software works within the enterprise, customer portals, and websites. It turns searches into actionable insights, regardless of where your content or users reside.

**Want to learn more?**

# **Contact us.**



[bainsight.com](https://bainsight.com)

339.368.7234

[bainsight@uplandsoftware.com](mailto:bainsight@uplandsoftware.com)