



# Enterprise Search by Hyland

## White Paper by RPI Consultants

Enterprise Search by Hyland is a robust and powerful search engine that indexes and searches across multiple document, record, and data repositories across your organization, including ERP, ECM, and BPM systems, network directories, and even websites.

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# Overview

**Enterprise Search by Hyland** is a powerful search engine that indexes and searches through documents, files, and data repositories throughout your organization. Generally speaking, Enterprise Search is platform agnostic which means that it can be configured for nearly any data source or indexing system, including Hyland products OnBase and Perceptive Content, but also ERPs, EMRs, shared network directories, email servers, and even public websites.

In addition to standard keyword and index key searching, Enterprise Search also runs documents through Optical Character Recognition (OCR), providing full-text level searching across document repositories. OCR indexing includes structured document storage and repositories, as well as semi-structured and unstructured content stores.

Enterprise Search is also relatively easy to configure, with the Administration Console and End User portal both available through a clean and intuitive HTML5 browser interface, similar to Google or Bing. However, it does require its own web server with additional optional servers to support content crawling and indexing services. Additionally, due to the amount of data required to support Enterprise Search, it requires a significant amount of storage.

## Business Challenges

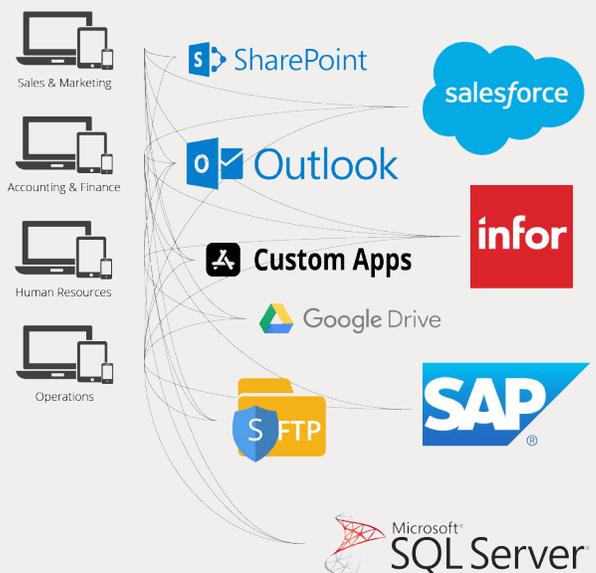
Every organization and industry represents unique and diverse business challenges, but content and data transparency are universal.

Important business processes can experience costly delays and errors when users and departments don't have access to key documents, correspondence, and other critical information that is required to get work done.

**Enterprise Search** can be configured to meet several important business challenges, including:

- Issue Troubleshooting and Support
- Customer Service and Management
- Contracts and Service Agreements
- Annual Auditing and Compliance
- Legal Discovery and eDiscovery

## Enterprise Content Challenges



Enterprise data and content is usually scattered across multiple systems, platforms, and databases.

This makes it difficult and time consuming for departments to share information and documents.

# Enterprise Search in Action

Within modern organizations, documents, email, electronic records and associated data can be stored in a number of locations, in non-standard formats, and are often completely disorganized. Users and departments may keep documents and data in emails, local files, content management systems, on their mobile devices, in the cloud, and many other locations. Users may also be in your organization's main office, working remotely from their homes, or even out in the field trying to access documents from their laptop, tablet, or mobile devices via data connections.

**Enterprise Search by Hyland** creates order from chaos by organizing and indexing content by format, keywords and metadata, and source or location. With a familiar web-based HTML5 interface, available on any web browser on any device, users are able to search, discover, and navigate content from multiple systems, platforms, and locations within a single search.

To better organize and make content and data available to users, **Enterprise Search** creates indexes across your ECM, ERP, BPM, email server, and any other application or content storage platforms. Users can search across one or more of these systems at the same time using keywords or indexes stored on document images, inside emails, and within database tables. The results are provided to users via a single point of access for your entire organization.

## Enterprise Search Solutions

Sales & Marketing    Accounting & Finance    Human Resources    Operations

### Enterprise Search

Enterprise Search programmatically interrogates and indexes configured document storage and data repositories across the enterprise, providing search results in a single responsive HTML interface.

## Search Results

Search results and returned data can be viewed from within the Enterprise Search website, but can also be downloaded or shared with auditors and other external users, as required.

Along with standard values such as document or file names, and other common data, there is a timeline showing when the returned data was originally created. Additionally, there is a 5-star rating system that rates returned data against your search based on strength and relevancy.

Enterprise Search search results will also automatically filter based on the document and the logged in user's level security for Enterprise Search and the content source.



# Sample Use Cases

## A Sheriff's Department Investigation

A Sheriff's department was trying to solve a number of open theft cases. The cases involved everything from stolen from cars and property taken from inside of homes, businesses, and store. With so many different stolen objects and items, the department struggled to find evidence, track down leads, and search for the stolen property.

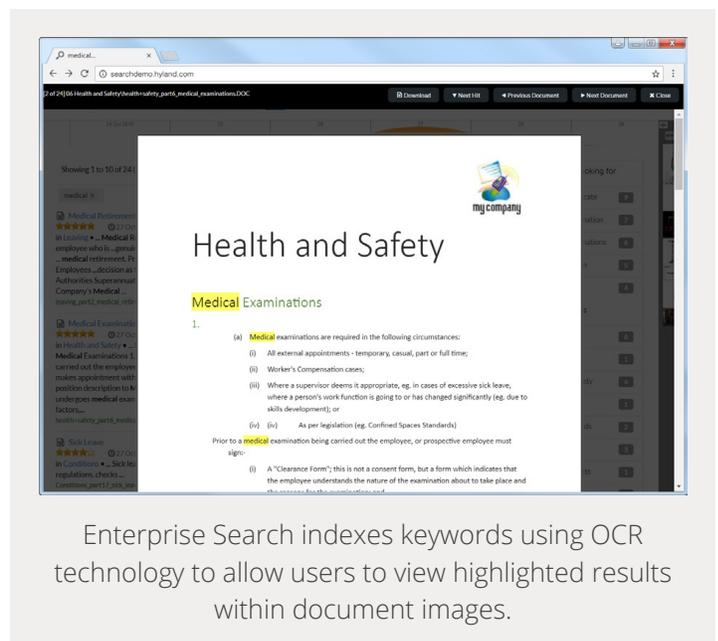
Leveraging **Enterprise Search**, the department was able to index the entire Craigslist website, a typical resource used by criminals to resell stolen property to unsuspecting buyers looking for a good deal. After indexing the website, they were able to perform complex searches for items and timelines that fit the description of the alleged crimes and stolen property. This allowed them to narrow search parameters and find suspects for various theft-related crimes.

While this example uses Craigslist, **Enterprise Search** can be used to index and search any publicly facing website, including resources like Wikipedia or the Library of Congress, or even online social communities and platforms such as Twitter, Facebook, and Reddit.

## Auditing Manufacturing Part Numbers

A vehicle manufacturing organization had an important and time sensitive upcoming audit related to the launch of a new vehicle. Audits typically require a significant amount of resources and time to research, locate, and compile important documents, data, and logging information. This specific audit required the company to find various part numbers found within text on a large number of digital files and documents.

Rather than enlist individual employees to manually review thousands of pages and track appropriate part numbers by hand, the company chose to use Enterprise Search's Optical Character Recognition (OCR) technology to actually scan and mine the digital files to index part numbers, even if they were not already indexed as keywords or document properties. They were then able to search their structured and unstructured documents using Enterprise Search, allowing them to meet the time sensitive audit requirements.



Enterprise Search indexes keywords using OCR technology to allow users to view highlighted results within document images.

# Summary

**Enterprise Search** is an incredibly scalable application and can be implemented for small organizations indexing just a single data source, or it can be implemented across a massive enterprise with dozens of indexes focusing on various data sources from different applications. Enterprise Search saves time and resources by creating transparency and connecting all your departments to the important content and data that helps drive business and workflows.

## Considerations

For Perceptive Content Server (ImageNow) customers upgrading to 7.2, it is important to note that Full Text Agent, also known as Perceptive Content, has been phased out and replaced by Perceptive Experience Search. Experience Search is a lighter version of Enterprise Search and is considered a license swap for Full Text Agent license holders who are upgrading to version 7.2.0 or later.

The screenshot displays the Enterprise Search web interface. At the top, there is a search bar with the query 'medical' and a dropdown menu for 'Policy Documents'. Navigation options include 'Menu-Assisted', 'Advanced', 'Natural Language', and 'Preferences'. A timeline at the top shows search results from 24 Oct 2016 to 29 Oct 2016, with a peak on 27 Oct 2016. The main content area shows 'Showing 1 to 10 of 24 (114 hits)'. Three search results are visible:

- Medical Retirements**: 5 stars, 27 Oct 2016, 21 hits. Snippet: 'in Leaving • ... Medical Retirements Medical Retirements Page 1 of 3 Leaving Medical Requirements An employee who is ...genuinely unable to continue to work due to medical reasons may be considered for ... medical retirement. Procedures (a) Members of the State Superannuation Fund (SSF) Salaried Employees ...decision as to whether or not a person should be medically retired lies with the ...State Authorities Superannuation Board or Health Department by the Company's Medical Officer. The Company's Medical ...' Document: [leaving\\_part2\\_medical\\_retirements.DOC](#)
- Medical Examinations**: 5 stars, 27 Oct 2016, 21 hits. Snippet: 'in Health and Safety • ... Medical Examinations Medical Examinations Page 1 of 3 Health and Safety Medical Examinations 1. (a) Medical ... Confined Spaces Standards) Prior to a medical examination being carried out the employee, or prospective employee must sign:... Pre-Employment Medicals (a) Convenor makes appointment with Medical Section. (b) Hazard check list is ...supervisor and sent with a copy of position description to Medical Section prior to medical examination being carried out. ...c) Applicant undergoes medical examination for determination of risk factors. (d) Convenor is advised of risk factors...' Document: [health+safety\\_part6\\_medical\\_examinations.DOC](#)
- Sick Leave**: 4 stars, 27 Oct 2016, 16 hits. Snippet: 'in Conditions • ... Sick leave will be granted subject to such medical examinations, protective regulations, checks ...' Document: [Conditions](#)

On the right side, there is a sidebar titled 'Are you looking for' with a list of categories and their respective hit counts:

- Medical Certificate: 9
- Medical Examination: 7
- Medical Examinations: 6
- Medical Section: 5
- A Medical: 4
- Categories: 4
- Conditions: 6
- Conduct: 1
- Health and Safety: 4
- Leaving: 1
- Personal Records: 2
- Recruitment: 3
- Staff Movements: 1

Enterprise Search lets you select the information source, timeline, and keywords for the documents and content you're searching in a simple HTML-based interface that works on almost any browser across almost any device.

## About RPI Consultants

RPI Consultants is an industry leader in Enterprise Resource Planning, Enterprise Content Management, and Business Process Automation technical consulting services. RPI has extensive experience designing, implementing, and supporting Infor Lawson, Perceptive Content (ImageNow), Kofax, On-Base by Hyland, and Brainware by Hyland (formerly Perceptive Intelligent Capture).

RPI employs approximately 100 full time consultants, developers, and solution and technical architects with specific experience and expertise across many industries and solutions. RPI is based out of Baltimore, Maryland, with additional offices in Tampa, Florida, and Kansas City, Missouri.

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**RPI Consultants** partners with the industry's leading enterprise data, content and business process automation vendors to provide deeply integrated and value driven technology solutions.



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