



## EVERYTHING YOU DON'T KNOW ABOUT DESKTOP SEARCH

PLUS A 12-STEP CHECKLIST FOR EVALUATING DESKTOP SEARCH FOR THE ENTERPRISE

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## INTRODUCTION

Anyone who has taken even a brief glance at the technology trade publications in the last six months has most certainly come across the term 'desktop search'. The topic has received ample coverage, courtesy of the more than half-dozen companies that have announced either new or enhanced desktop search products.

For the first time, countless individuals are experiencing the basic end-user benefits of desktop search. But despite all the attention the newest breed of desktop search is receiving in the press, here's what the media hasn't told you:

- **Desktop search is NOT new.** Although a small market, a handful of software vendors has been providing businesses worldwide with commercial desktop search software for more than a decade.
- **Today's newcomers aren't ready for the enterprise.** It's true that these tools are prompting consumers to look at search in a whole new light, and some of them are reasonably capable in helping users locate locally stored data. But without broad file format support, multi-lingual search capabilities, advanced functionality, network support and proper security measures, these tools don't meet the needs of the enterprise.
- **You get what you pay for.** Most people accept that free software equals limited software. Desktop search is no different in that today's new free tools barely scratch the surface of what's possible. Businesses and government organizations that require a higher level of search sophistication recognize that free products don't address the full scope of their search needs and are therefore insufficient.

This document provides an overview of the primary differences between consumer and enterprise desktop search, and the pitfalls to avoid. By outlining the three key reasons for implementing desktop search for your organization, this paper also examines the business benefits that desktop search lends to employees, workgroups and your entire enterprise. It also covers the areas that you should consider when evaluating potential desktop search solutions. You can use the 12-step checklist at the end of this white paper to define your own requirements for evaluating vendors.

The following topics are covered:

1. The Difference Between *Consumer* and *Enterprise* Desktop Search
2. Three Reasons for Implementing Desktop Search:
  - I. Greater Productivity
  - II. Better Quality Decisions
  - III. Improved Customer Service
3. Desktop Search Functionality – The Basics
4. Data Sources & File Formats
5. Technology Environment
6. Advanced Features
7. Scalability
8. Installation and Maintenance
9. Pricing Structure
10. Vendor Credentials
11. Requirements and Evaluation Checklist

## 1. THE DIFFERENCE BETWEEN CONSUMER AND ENTERPRISE DESKTOP SEARCH

You've read it in the news – desktop search has become all the rage, and one of the more popular tools proffered by today's software and Internet giants. But take a closer look at these beta products, and it becomes clear that the software is just that – beta.

To be certain, consumers can derive benefit from just about any of these tools, despite the relative immaturity of the products. In reviews conducted by various members of the media, some products are rated higher than others, primarily due to offering broader file format support and a greater level of sophistication. But whether you're reviewing technology from Google, Microsoft or another new vendor, industry analysts have gone on record to caution organizations against adopting these technologies within the enterprise.<sup>1</sup>

Interestingly, desktop search is nothing new. In fact, thanks to a handful of software vendors, people have had the ability to search their local and network drives longer than the World Wide Web has been around. Some have even been supplying desktop search software since DOS was the de facto operating system, which means these tools have been developed with the enterprise in mind since day one.

But what does that mean to Windows professionals looking to enhance their organization's capabilities via search software? Specifically, what are the key differences between consumer and enterprise desktop search? To summarize, the primary differences are as follows:

- **File Format Support.** The overwhelming majority of consumer desktop search tools support only a few file formats, such as Microsoft Word, HTML and some email. By contrast, enterprise desktop search solutions support more than 100 file formats, including all Microsoft Office applications, PDF, a variety of email clients, attachments, XML, legacy formats like WordPerfect, and a host of databases. Given that most organizations have a wide variety of structured, semi-structured and unstructured data formats, the breadth of support offered by enterprise desktop search tools becomes an important distinction for most businesses.
- **Security.** Any application being considered for the enterprise must offer sufficient security measures to ensure the integrity of an organization's intellectual capital is solid. When it comes to sensitive data, today's new consumer desktop search tools don't do enough to protect companies from individuals who would exploit security holes. Most enterprise desktop search tools rely on Windows 2000 authentication, thus ensuring that the access rights set at the server level are respected by the search client.
- **Breadth of functionality.** Enterprise desktop search tools offer Windows professionals and their end-users mature technology and a wide array of features designed to meet the sophisticated search needs of businesses and government organizations. Specifically, these features include the ability to index network drives; multiple query methods to account for the differences in how users search for information; support for multiple foreign languages; auto-categorization and clustering for ease of results navigation; shell integration and taskbar and hotkey searching to enable ubiquity of the desktop search client; and server functionality to centralize management and control of the technology.

The following information focuses specifically on enterprise desktop search, its features and functionality. In reviewing this content, you will gain a better understanding for your organization's requirements for enterprise desktop search and the value of the technology.

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<sup>1</sup> <http://www.pcworld.idg.com.au/index.php/id;2028499301;fp;2;fpid;1>

## 2. THREE REASONS FOR IMPLEMENTING DESKTOP SEARCH

Organizations operating in a variety of vertical markets have demonstrated time and again three strong reasons for implementing desktop search technology and the benefits gained. First, it provides significant productivity improvements. Second, it encourages better quality decision-making. And third, it enables your organization to offer vastly improved levels of customer service.

### **Greater Productivity**

Countless studies show that people spend a significant portion of their work week simply searching for information. Whether it is information they or their colleagues created, a desktop search engine provides the ability to quickly find it, no matter where it is located or in what format the information resides. Rather than opening and scanning documents one after the other to try and find information, a search engine enables a user to simply type in the relevant search terms and instantly see any documents containing those terms.

In some environments where the amount of data is very large, it's impossible to open and review every document to find relevant content. In such situations a search engine is invaluable in identifying and displaying documents that contain potentially important information. A survey conducted by ISYS Search Software found that more than 50 percent of respondents saved between six and 10 hours a week using search engine software -- a considerable timesaving.

In addition to finding information fast, search engine software finds information that other people have created, which means duplication of work product is minimized, if not eliminated completely. For example, if key staff members leave, their knowledge and work can be retained by enabling other staff to access it via a search engine. Instead of having to read through all that staff member's documents, others can access just the relevant information by entering basic search terms or phrases into the desktop search engine. Together, these benefits deliver greater productivity across a workgroup, department or entire enterprise.

### **Better Quality Decisions**

Search software enables better information availability by making it practical and easy for people to search large amounts of data, as explained in the previous point. In addition to this, search software provides access to previously inaccessible information. Legacy systems and databanks can be indexed and searched, providing valuable access to historical records and information that might otherwise be ignored. Most importantly, users can view this information regardless of whether or not they have the original application that created it.

This means that any information relevant to a particular decision can be called up in an instant. For example, a sales manager can quickly find any previous quotes that have been submitted to a particular customer, or review details of conversations they might have had. A service representative can instantly locate a customer's records and offer more rapid and accurate responses. A technical support engineer can find reports or technical documentation to identify a particular problem, and quickly solve it.

If staff members are fully informed when making decisions, they're in a much better position to make the right decision. Missing information encourages mistakes and bad decision-making. In business, the quality of decision-making is a primary factor in determining the success or failure of an organization. Access to timely, relevant information can make the difference between poor decisions that lead to mediocre performance, and the high-quality decisions that lead to stellar results.

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### **Improved Customer Service**

Productivity and decision making are certainly two key factors in determining business success. But another equally important element is customers – unhappy customers can doom a company to failure. Desktop search software can help make customer service easy and accurate; and best of all, a satisfactory experience for the customer. It enables customer service staff to find the precise information that customers need, in a timely manner, thus ensuring more streamlined and efficient operations.

Customer service representatives can access any document format, from service databases and product manuals, to relevant websites and previous customer communications, all from a single search. They can also use features such as annotations, so they can add comments and notes to documents in the data repository, without altering the original documents themselves. In this way, their experiences and learning can be shared, improving the quality of the customer service response.

### **3. DESKTOP SEARCH FUNCTIONALITY – THE BASICS**

A good start to understanding what you need from your desktop search engine is to first work out what role you want it to play for you and your organization. Depending on your line of business, desktop search software can achieve different objectives. Some examples of the different roles played by search engines include the following:

- **Help Desk/Customer Support** – enable help desk staff to find information to quickly and easily answer customer queries, by searching PDF manuals, product catalogs, support documentation and more.
- **Engineering/R&D** – find relevant research or technical information. Search journals, product specifications or research reports, no matter what the format.
- **Audit/Forensic Accounting** – gather forensic evidence by examining corporate communications and documentation, from emails and company reports through to spreadsheets and databases.
- **Legal** – collate background information in preparation for court cases by searching transcripts, testimony, discovery data and more, without moving, changing or manually categorizing files. Search for precedents, laws or judgments in related cases. Reduce rework in contract creation by searching previous contracts.
- **Human Resources/Recruitment** – quickly find suitable candidates by searching candidate applications for key criteria. Set up automatic notifications for when new candidates enter the system. Search personnel files and communications.
- **Sales & Marketing** – improve proposal and sales response turnaround time by searching previous project documentation and customer submissions. Find customer information and competitor intelligence.
- **Management** – provide a 360-degree view of the business by searching for information in meeting minutes, reports, proposals, emails, invoices or customer databases. View content together in one place, from many disparate data sources around the company.
- **Personal Knowledge Management** – avoid losing work you've already done by searching your emails, documents, spreadsheets and relevant data on the network.

How do you see search software most benefiting you and your organization? It may assist in one or more of the areas described above, or somewhere else altogether. Knowing the context of its use can help to narrow down the functionality you'll require. Keeping this in mind, the following sections of this document outline some of the issues that you'll need to consider.

#### 4. DATA SOURCES & FILE TYPES

Once you have an idea of the role you see desktop search playing for you or your organization, you can work out what type of file formats and data sources your search engine will need to support. List out every file type used in creating the information that needs to be searched. These usually fall into one of three categories:

- **Unstructured formats** are file formats that contain primarily text-based information. These include text files, word processor files, PDFs, emails and formats used to create most documents. There is no real structure to these file formats and few relationships exist between elements within them.
- **Semi-structured formats** are file formats that contain a mixture of text-based and data-based information, with a basic structure. These include file types such as HTML, spreadsheets and XML. There may be relationships between elements within these files, however they are not as rigidly defined as they are in structured formats, and there may be sections of textual information where no structure exists.
- **Structured formats** are file formats where the information is contained in a well-defined structure, such as a relational database. Many enterprise systems have a structured architecture, such as ERP and CRM systems, as well as many legacy databases.

The key difference between desktop search and a web-based search engine, such as one that might be used on an intranet, is that a desktop search product can access the files on your own PC. These include emails, documents, personal databases or other data stores that you might use. Of course, it's still possible to search network-based information as well, but a desktop search product provides the additional capability to search data on your own PC at the same time. This is private and secure, and not accessible to other users on the system unless you specifically make it available to them. So, you can run queries across network information, personal PC-based information, or a combination of the two, from a single window.

You may want to start your search engine implementation by simply accessing all the information on your own system, such as emails and documents. Then you may decide to provide access to your customer database or to XML data created in other systems. It might be beneficial to have shared information stores, so that workgroups can access indexes of the same data. Your search engine needs to be able to support the full spectrum of file types that you require, even in multiple languages, if that is a concern for your organization.

Think about data scope – depending on the sources of the information you want to make available via the search engine, you might need one that provides umbrella functionality over many different data sources. Some search engines are designed for specific data types, such as structured data, or are limited to single data repositories, such as search engines within content management systems. If you need to incorporate legacy data into the data repository, you need a search engine that can support this.

Finally, consider whether you want to incorporate web-based data sources into your search repository. Spidering functionality enables websites to be integrated into your desktop search environment. You can include your own intranet site, the websites of suppliers or partners, for example, or simply websites of relevance to your role or industry. The search engine will then include this website content when you conduct a search.

## 5. TECHNOLOGY ENVIRONMENT

Your options will be determined by your internal technology infrastructure. List out all of the systems and software that will interact with the search engine. These include your networking software and architecture, and your file system security environment. Think about any other systems that need to integrate with the search engine, such as content management systems, ERP, CRM, email servers or legacy systems.

## 6. ADVANCED FEATURES

For organizational deployments, there will usually be a wide spectrum of users, from very basic all the way through to highly technical power users. The search function needs to cater to the entire user community with a simple, yet powerful interface that provides options for advanced searching if required.

There should be three steps to the search process, and a range of features that work to streamline each of these steps; the important ones are described below. But remember, you may have specific objectives for your search engine that require certain features more than others, and you should keep this in mind when discussing features with vendors. Which ones do you really need for your specific application?

The three steps in the search process are (1) Entering the Query, or asking the initial question; (2) Results Navigation, or the process of sifting and sorting through results; and (3) Knowledge Discovery, or the process of locating and sharing the relevant pieces of information.

**Step 1: Entering the Query.** When users enter their queries, they should have the option to do so using a natural language approach; that is, by simply entering the question as they would ask it. Such as “What is our return policy on refrigerators?” There should also be the option to build queries using Boolean or proximity operators, so that users who know exactly what they want can be extremely specific with their search. For example “returns within 10 words of refrigerator but not freezer”. Check the user interface to make sure it is intuitive for basic users, but also provides powerful advanced search functionality for more experienced users. Some specialized areas might require extremely precise functionality, such as law enforcement, government and legal.

A good search engine should enable you to group logical chunks of information together so that searches can be conducted on specific areas of interest. For example, an engineer may only be interested in searching technical documentation and might not want to search the HR policies that are also available on the network. The search engine needs to be able to group information separately to enable this to happen.

Post-search grouping is also a useful feature, so that users can opt to view only results in a selected category. Some search engines feature automatic categorization features that determine the relevant category listing dynamically, so that only the most relevant categories are listed. This can be an extremely handy feature for users, particularly in environments where there are large amounts of data covering many different topics.

There should also be tools such as thesaurus functionality, where the search engine picks up common words with similar meanings; and user-defined synonyms that can be customized to include terms relevant to your particular organization or market. Spelling errors should be accounted for with a ‘sounds like’ function, which enables users to find other words that sound similar to the one they are typing. This compensates not only for spelling errors when the user enters the query, but also for errors within the data itself, ensuring that such data is not lost forever. And finally, some users work primarily with structured information and require the ability to search just metadata, or even increase the relevance of hits that occur in meta fields.

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**Step 2: Results Navigation.** In any organization, even within a single department or workgroup, the amount of information can be overwhelming. To combat this, your search engine should offer ample results navigation features to ensure employees connect with desired content in as little time as possible. Failing to do so means you aren't fully capitalizing on the benefits of search. When evaluating your search engine, look to the following results navigation features to ensure the software satisfies your needs:

- **Auto-Categorization.** Perhaps the best tool in helping employees narrow a list of results is the use of dynamically generated categories. For example, a search for 'corporate marketing plan' might return a variety of documents related to the query, but the one an employee wants might be found in a category labelled 'January 2004'.
- **Results Clustering/Grouping.** It's one thing to offer sort capabilities that enable users to manipulate how results are presented. But take that one step further and you get results clustering, which presents results in logical groups. Some search engines enable you to group by file type, category or date. This functionality turns a long sorted list into a logically grouped list that's easier to read and navigate.
- **Preview Pane.** Having to double-click and open each result that you might be interested in is not only time-consuming but inexact. The preview pane built into the results window ensures users spend as little time as possible browsing results.
- **Document Summary Information.** The convenient display of document metadata and attributes such as file type, file size, date last changed, relevancy rating, category and the number of 'hits' (search terms found) in the document. The display of an extract of the document, say several lines above and below the first hit, is helpful in determining the context in which the document has been returned.

**Step 3: Knowledge Discovery.** The search process doesn't stop once the user receives the list of results. They then need to refine and manipulate the results list until they find exactly what they were looking for. There are many features that can assist in this task, some of which include:

- **Hit-To-Hit Navigation.** The provision of navigation buttons enabling users to go directly to the first hit in the returned document, and thereon to the next or previous hit as required. This means users avoid having to read through pages and pages of document before finding the relevant section, making it much more efficient.
- **Hit Highlighting** – a familiar concept from searching the web, hit highlighting is when the key words, or 'hits', in a document, are highlighted in a different colour. This feature is often not available in a search engine, but it really should be, as combined with hit-to-hit navigation it enables users to immediately see the relevant sections of the document.
- **Search Within.** The ability to search within the current set of results, to further narrow them. This is just one of a number of filtering capabilities that are possible with enterprise desktop search.
- **Intelligent Agents.** Desktop search tools can offer proactive means of knowledge discovery. Intelligent agents enable employees to create pre-defined search criteria. New information that matches these criteria prompts the desktop search tool to automatically notify the end-user of the availability of this information.

Although just some of the features available in desktop search engines, these are the main features required to ensure that users have the best overall experience. Others that might be relevant to your organization include the ability to save or export search results, or taxonomy tools that enable your administrators to build a directory structure around your content.

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If you have a specific need, you should discuss it with your potential vendor. If they don't have a ready-made feature to solve your problem, they'll probably have software tools to enable custom requirements to be developed.

### **7. SCALEABILITY**

A flexible search engine that is cost-effective and expands to suit your growing requirements can be a much better investment than a cheap product with no ability to scale or an expensive solution where the majority of its functionality is wasted. It's appropriate to discuss with your vendor your plans for the future expansion of the search engine software; this can uncover potential problems before they become expensive or impossible to surmount.

### **8. INSTALLATION AND MAINTENANCE**

The process required to install and maintain search engine software can have an enormous impact on the overall cost and ROI of your project.

- Does the search engine require significant data preparation and re-location, or can it index the information where it currently resides?
- Does the system have to be customized, and will it require external consulting? What will all this cost?
- What happens if you want to modify or expand the system – can you do this in-house using staff with general IT skills or will you need to call in a specialist?
- What ongoing maintenance of the system is required, and what type of person is required to undertake this maintenance?

All of these are important considerations when it comes to investing in search engine software, and ideally you should look for a system that minimizes both the up-front installation cost as well as the ongoing maintenance. There are certain types of systems that legitimately require a lot of IT effort in order to maintain their usefulness, however the standard desktop search engine should not fall into this category.

### **9. PRICING STRUCTURE**

Pricing structures vary between vendors. Consider carefully how you think your system will expand over time. Some vendors charge on a per-document basis, which means as your content grows, so will the bill for the software; obviously, this isn't an ideal situation for most businesses. Other pricing models include corporate licensing or per-seat licensing.

Most vendors offer some type of maintenance – make sure to ask how much this will cost, and how it will change over the life of your project.

The bottom line where pricing is concerned is to keep in mind important factors like return on investment and total cost of ownership. These are not just fancy buzzwords, but real considerations. For example, how long will it take to implement the desktop search solution? If the answer is weeks or months, this automatically increases your timeframe for realizing a measurable return. Likewise, if your vendor charges on a per-document basis, this means that as your content grows (which it will), so too will the price of the software. This means that your total cost of ownership will never be as optimal as you might like. Talk to your potential vendors about how they address these important variables and what they can do to help you produce favorable results.

## 10. VENDOR CREDENTIALS

As with all purchases, it's critical to ensure that your vendor is reputable. Check that they have been in operation for a reasonable length of time, and find out how mature their particular technology is. Early generations of desktop search software are likely to be less tested, less sophisticated and less business-oriented than software that has been refined over many years.

Establish whether the search engine product range is a priority for the vendor. If the vendor is primarily focused on other software products, they might not have solid plans to continue developing and maintaining the search engine range. Make sure the product will continue to receive ongoing development and technical support. Ensure the vendor offers a help desk for technical support. Importantly, ask the vendor to provide case studies and examples of other implementations for which their product has been used. Ask for references so you can talk to other organizations that have used the software.

## SUMMARY

In this document we have provided some guidelines for evaluating and selecting a desktop search engine for your organization. As with all software, knowing what you're trying to achieve and talking to a number of different vendors is a good start. The massive benefits that can be obtained from getting your desktop search functionality right from the start are worth the effort of some upfront research. You can use the checklist at the end of this document to specify your requirements and compare these with different vendor offerings. Good luck on your *search!*

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## DESKTOP SEARCH ENGINE REQUIREMENTS & EVALUATION CHECKLIST

Complete the blanks before evaluating your selection of search engine software against the listed criteria.

### 1. OBJECTIVES - what are the main objectives of your desktop search implementation?

*For example:*

- Accelerating the sales process
- Providing a tool for the help desk
- Helping management make decisions

How do you expect the search engine reach to grow and expand over time?

- Inclusion of more data/file types
- Incorporation of other parts of the organization
- Integration with other enterprise systems

How do you see the search engine best adding value to your organization?

*For example:*

- Providing access to 10 years of legacy data
- Searching previous sales proposals
- Quick access to technical manuals for the help desk
- Searching minutes of board meetings

### 2. ENVIRONMENT

Upon which platforms are your desktops and networks based?

- Windows
- Unix
- Other (which?)
- Linux
- Macintosh

### 3. FILE FORMATS

Which file formats do you need to support? *Check all that apply*

#### Unstructured formats

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Text (ANSI/ASCII)   | <input type="checkbox"/> Microsoft PowerPoint   | <input type="checkbox"/> Email – which format? |
| <input type="checkbox"/> Adobe Acrobat (PDF) | <input type="checkbox"/> Rich text format (RTF) | <input type="checkbox"/> Flash                 |
| <input type="checkbox"/> Microsoft Word      | <input type="checkbox"/> ZIP                    | <input type="checkbox"/> Wordperfect           |

#### Semi-structured formats

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Dbase (dbf)     | <input type="checkbox"/> Lotus Notes                  | <input type="checkbox"/> External websites |
| <input type="checkbox"/> Microsoft Excel | <input type="checkbox"/> Lotus 1-2-3                  | <input type="checkbox"/> HTML              |
| <input type="checkbox"/> AutoCAD         | <input type="checkbox"/> Comma separated values (csv) |  |

#### Structured formats

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> Microsoft Access     | <input type="checkbox"/> XML (listed as semi in body text) | <input type="checkbox"/> Oracle              |
| <input type="checkbox"/> Microsoft SQL Server | <input type="checkbox"/> ACT!                              | <input type="checkbox"/> Other ODBC-database |
| <input type="checkbox"/> mySQL                |  |  |

#### Other formats (custom, legacy information or other)

- 1.
- 2.
- 3.

### 4. FILE VOLUME & SIZE

How large will the data repository be?

#### File storage

- < 10 MB
- 10 – 500MB
- 500MB – 1GB
- 1GB – 10GB
- >10GB

### 5. SECURITY

What system is used for file-level security?

- |                             |                                  |                                    |
|-----------------------------|----------------------------------|------------------------------------|
| <input type="checkbox"/> NT | <input type="checkbox"/> Netware | <input type="checkbox"/> .htaccess |
|-----------------------------|----------------------------------|------------------------------------|

### 6. DATA SEGMENTATION

What groupings will be required for your data?

- |                                |   |   |
|--------------------------------|---|---|
| <input type="checkbox"/> None  | <input type="checkbox"/> Geographical         | <input type="checkbox"/> Functional<br>(human resources, engineering,<br>marketing, customer service etc) |
| <input type="checkbox"/> Other | <input type="checkbox"/> By business division |   |

## 7. FOREIGN LANGUAGES

What foreign languages must the system support? (list)

- 1.
- 2.
- 3.
- 4.
- 5.

## 8. FEATURES

**STEP 1** – Entering the Query – what query-related functionality do you require?

- |  |   |
|--|---|
| <input type="checkbox"/> Natural language query  | <input type="checkbox"/> Thesaurus (standard)   |
| <input type="checkbox"/> Boolean query   | <input type="checkbox"/> Synonyms (specific to customer)                                    |
| <input type="checkbox"/> Options for intermediate & advanced queries   | <input type="checkbox"/> 'Sounds like'<br>(eg. "litergayshun" = "litigation")               |
| <input type="checkbox"/> Query builder (menu of Boolean commands that users can click on to construct their query) | <input type="checkbox"/> Spell checker/'did you mean'?                                      |
| <input type="checkbox"/> Taxonomies  | <input type="checkbox"/> 'Starts with'  |
| <input type="checkbox"/> Fielded and meta-data searching (eg. "author = Jenkin")                                   | <input type="checkbox"/> Conflation (eg. "Manage~" returning Manager, Managed etc)          |
| <input type="checkbox"/> Search separate data groupings<br>(eg. Search HR documents separately from engineering)   | <input type="checkbox"/> Proximity searching<br>(eg. Within 10 words of)                    |
| <input type="checkbox"/> Search date ranges<br>(within files, not just on file save dates)                         | <input type="checkbox"/> Restrict search by file type<br>(eg. Only text files)              |
| <input type="checkbox"/> Intelligent date & number recognition<br>(eg. 01/01/02 = 1 <sup>st</sup> Jan 2002)        | <input type="checkbox"/> Intelligent agent – alert user when new data appears in repository |

**STEP 2** –Results Navigation – what tools are available to help users quickly locate the right information?

- |  |  |
|--|--|
| <input type="checkbox"/> Auto-categorization         | <input type="checkbox"/> Document summary information  |
| <input type="checkbox"/> Results clustering/grouping | <input type="checkbox"/> Result extracts/context views |
| <input type="checkbox"/> Preview pane                |  |

**STEP 3** – Finding the right answer – what functionality do you require to help users get the answer they are looking for?

- |  |  |
|--|--|
| <input type="checkbox"/> Document statistics displayed in results (eg. File size, file path, save date, # of hits)                           | <input type="checkbox"/> Hit highlighting in document view, including PDFs                                       |
| <input type="checkbox"/> Fast document preview – viewing relevant sections of documents without downloading or scrolling through large files | <input type="checkbox"/> Hit-to-hit navigation<br>(eg. Go to first hit, go to next hit, go to next document etc) |
| <input type="checkbox"/> WYSIWYG document view<br>(eg. View in PDF or Word layout)   | <input type="checkbox"/> Hit highlighting in results list  |
| <input type="checkbox"/> Categorize results and filter or sort by categories   | <input type="checkbox"/> Automatic generation of Table of Contents for documents                                 |
| <input type="checkbox"/> Dynamic category creation   | <input type="checkbox"/> Search within results   |
| <input type="checkbox"/> Custom category creation  | <input type="checkbox"/> Filter results list (eg. By file type or date range)                                    |
| <input type="checkbox"/> Ability to use HTML templates to display results from databases (SQL, XML, other)                                   | <input type="checkbox"/> Re-sort results list (eg. By best match, # of hits, size, file type, date)              |

## 9. OTHER

What functionality do you require that is specific to your organization or environment? (list)

- 1.
- 2.
- 3.
- 4.

## 10. INSTALLATION & MAINTENANCE

How long will it take to implement the system and how much will it cost to implement and maintain?

	<u>Time Taken</u>	<u>Cost</u>
Initial piloting of software	_____	\$ _____
Customization of software to suit your needs	_____	\$ _____
Installation of software across enterprise	_____	\$ _____
Ongoing maintenance requirements (per year)	_____	\$ _____

- Does the vendor offer a help desk for technical and support queries?

## 11. PRICING

What is the vendor's price for providing your desired functionality?

One-off software licenses	\$ _____
Ongoing software/hardware rental fees	\$ _____
Ongoing maintenance fees	\$ _____
Cost for adding users	\$ _____
Cost for adding file types	\$ _____
Cost for any additional software modules	\$ _____
Cost for adding additional documents	\$ _____

## 12. VENDOR CREDENTIALS

What are the vendor's credentials?

- Have they been in business for more than five years?
- Are they profitable?
- Are they focused on enterprise search technology?
- Do they have an established customer base?
- Can they provide case studies to demonstrate that they have successfully implemented systems with similar characteristics to yours?
- Can they provide customer references?

**END OF CHECKLIST**