

Concept Searching News

Focus on...Records Management

October 2008

A consistent and dependable Records Management solution is becoming increasingly important to diverse industries who must proactively address organizational risk exposures whether they are litigation preparedness, industry regulations, or new statutes.

Concept Searching's technologies can be utilized along with a Records Management or Enterprise Content Management solution to facilitate the implementation and on-going management by providing automatic compound term metadata generation, automatic classification, taxonomy management, and automatic classification when content is created. Organization's now have the ability to capture the automatically generated semantic metadata and utilize that metadata to significantly improve their records management initiatives. Coupled with the automatic classification of content as it is created removes the burden from the end user and protects the organization from potential exposure. The compound term metadata can not only be used by the records management application but also to improve the search and retrieval of those records when needed. The technologies can be used to address a wide range of records management challenges. [Click here to read our white paper.](#)

We hope you find this newsletter informative and worthwhile.

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Using Concept Searching in SharePoint Records Center



This Global Fortune 500 enterprise is one of the world's largest energy companies and employs approximately 97,000 people worldwide. Faced with the challenge of improving enterprise records management they will embark on a Microsoft SharePoint and Concept Searching solution. There are several approaches to generate metadata. Syntactic metadata can be automatically created by the application for example the creation date of a document, the author, properties, versions, etc. Metadata can also be added by the end user to further define the content within the document. Semantic metadata generation automatically identifies how data items are related as well as the meaning of the content. The conceptClassifier technology has the ability to automatically generate semantic metadata that can be passed to the Records Center. Utilizing conceptClassifier's compound term processing a taxonomy is developed based on the Records Retention Schedule that is configured in the MOSS production environment. A workflow or custom router in MOSS is then configured to automatically send uploaded documents, triggered on the Add Event to the Records Center. The workflow inspects the retention code custom property on the uploaded document and compares the value to the Records Center routing list and if there is a match automatically moves the document to the Records Center and places a link to the document back in the Library where it was uploaded. The result, as documents are uploaded to the Libraries they can

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New Web Cast Links

Technology Web Casts

[Understand Our Value Proposition - Watch The Sound Bite Here](#)

[conceptClassifier Enhancing ECM](#)

[See How We Integrate with Microsoft Office & Deliver Governance at the Desktop](#)

[Learn About Our Easy to Use Taxonomy Manager](#)

Client Web Cast

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automatically be declared records and users can still browse and find documents they have uploaded in the same location. This provides significant advantages as there is no longer the restriction of utilizing syntactic metadata but the automatic semantic (compound term) metadata generation and classification can be used to improve the process. [To read more click here.](#)

Solving Records Management Challenges



innovative advanced technologies that improve records management, compliance, and governance

The Challenge

Records Management initiatives require significant investments in time and money yet with all the careful planning content is proliferating at a break neck speed and better methods to manage the content can reap significant benefits. Records Management has become a corporate objective across diverse industries and at all levels of the organization due to increasing government, regulatory, and litigation requirements. Overwhelmingly enterprises find the biggest barrier to success is end user adoption resulting in noncompliance issues and the inability to provide corporate meaning to the entity. A successful records management solution must suit the organization's workflow, is easily adaptable by users and can be integrated into their daily activities, ideally as transparently as possible. Although not a new concept, metadata is a critical element of records management to define data so the system can properly apply rules for disposition. The challenge is making that metadata more useful for the records management processes, to the organization and ultimately the end user. For search and retrieval generating more descriptive metadata not only reduces operational costs and improves productivity but enables the organization to react more quickly, make better informed decisions and reduces organizational risk.

The Technology

Automatic Classification at the Desktop

Automatic classification of content from within the familiar Microsoft Office interface generates semantic metadata based on the meaning found within the content. This can be done automatically, with no user interaction, or optionally authorized end users can be given the authority to add manual adjustments to the classification to provide further refinement if required. [Click here](#) to watch the webcast.

Compound Term Processing & Semantic Metadata Generation

Compound term processing can address many challenges facing organizations who need a robust records management solution and provides many benefits. Instead of identifying single keywords, compound term processing identifies multi-word terms that form a complex entity and identifies them as a concept. Identification of concepts within a large corpus of information removes the ambiguity in search, eliminates inconsistent meta-tagging, and automatic classification and taxonomy management based on concept identification simplifies development and on-going maintenance. For more information about we address Enterprise Content Management [click here.](#)

Taxonomy Development

concept **Classifier** provides the ability to easily develop a taxonomy that can be used by Records Managers and when content is uploaded and classified into the taxonomy it can be routed to the records management application along with the compound terms enabling the automatic declaration of records. The taxonomy can also be used to identify content, regardless of where in the organization it resides to provide Records Managers the ability to identify similar records that share the same characteristics for processing within the records management system. Watch a [webcast](#) to see how easy our taxonomy is to use.

Search & Navigation

Concept Searching provides both taxonomy and faceted based navigation based on compound term processing for the retrieval of relevant information. Utilizing the compound term processing technology users are no longer relegated to searching on

Microsoft Enterprise Search Blog – July 7th

Microsoft Enterprise Search Blog - September 2nd

Microsoft - Concept Searching Case Study

Compliance Partners



Allin Corporation

www.allin.com

Since 1996, Allin has solved problems for businesses throughout the country employing Microsoft technology with integrated business units and practices. Allin Corporation is a leading Microsoft Gold Certified Information Technology Consulting firm. Allin delivers its services through four practice areas: Technology Infrastructure, Collaborative Solutions, Interactive Media and Business Process.

Applied Information Sciences (AIS)

www.appliedis.com

For 25 years, AIS (Applied Information Sciences) has provided software and systems engineering services to government agencies and Fortune 1000 companies looking to modernize their existing applications, automate business processes, gain better business insight, and create more effective workflow solutions for their employee, partner and customer experiences. AIS is headquartered in Reston, Virginia.

Belay

www.belay.co.za

Belay Solutions (Pty) Ltd is privately owned company that serves as an entrepreneurial hub for focused, owner operated ICT companies with unique cultures, which all share the same core values and social responsibility conscience with a joint go-to-market strategy. As a Microsoft Gold Partner Belay is a leader in providing data management solutions, information worker solutions, and custom development solutions.

BT Global Services

www.ins.com

BT in the U.S. and Canada provides solutions that help enterprises effectively use technology to drive business growth. The expertise of more than 4,000 employees enables them to help customers globalize their businesses in innovative and sustainable ways. BT has emerged as a leader in networked IT services providing professional services and consultancy,

single keywords. The search will aggregate content based on the concepts or keywords within the documents and rank the concepts higher than keyword only documents. Faceted results can also be presented to the end user offering content that may not have been found based on the search criteria, but are related based on the conceptual meaning.

[Read more information about our technologies](#)

The Benefits

- Provides transparent governance at the desktop eliminating end user adoption issues
- Protects enterprise record integrity as the burden of adding metadata is removed from the end user
- Ability to develop a taxonomy mapped to the Records Management File Plan and used to flag documents based on semantic and syntactic metadata for review
- Facilitates the planning and on-going management of Retention Schedules through identification of potential documents of record
- Ensures the records long term usefulness and reduces the costs and time to manage the records through the generation of far richer compound term metadata
 - Facilitates and enables the retrieval of relevant information and identifies highly correlated content that normally would not be found, reducing organizational risk
- Enables accessibility to records in a way that meets the needs of the organization and other stakeholders, increasing productivity and improving decision making capabilities
- Assists in the evaluation of records that can be deleted because they have no value or are duplicates, reducing costs and streamlining organizational and operational change
- Creates virtual centralization through the ability to link disparate content repositories enabling the effective management of organizational content and identification of similar records reducing costs, and improving productivity
 - Reduces the time and cost of finding the 'correct' business record
 - Improves the consistent development of corporate memory

[Read more about our solutions](#)

Labatt Brewing Selects Concept Searching



Canada's Labatt's Brewing Company have purchased Concept Searching's concept **Classifier** for SharePoint suite to deliver a comprehensive solution to tag and organize data for corporate use. Concept Searching's compound term processing, advanced semantic metadata extraction and tagging, taxonomy development and automated classification functionality provides Labatt's with the ability to extract metadata from corporate content, create a corporate taxonomy, automatically tag data with the prescribed taxonomy and automate classification of content to that taxonomy. Realizing the benefits the Concept Searching suite brings to SharePoint 2007 they will now be upgrading to integrate both platforms.

managed services and full outsourcing for business and IT transformation.

Business Connexion

www.bcx.co.za

Business Connexion (BCX) is a black empowered integrator of innovative business solutions based on information and communications technology (ICT). They are located in South Africa.

Catapult Systems

www.catapultsystems.com

Catapult Systems is a Microsoft technology company that provides application development, enterprise solutions, and infrastructure services. Their experienced teams use a proven approach and a personal relationship style to deliver the right solutions for clients. They are a Microsoft National Systems Integrator and have been building business critical systems and helping clients maximize their investment in Microsoft technology since 1993.

Gimmel Group

www.gimmel.com

Gimmel Group is a leading professional service firm offering a focused range of information technology services. They help the worlds leading companies improve business performance and compliance through the effective planning, implementation and integration of: Enterprise Content & Records Management, Geographic Information Systems, Web Design & User Experience.

Hitachi Consulting

www.hitachiconsulting.com

Hitachi Consulting is the global business and IT consulting company of Hitachi Ltd., and a recognized leader with deep industry, business, and technology experience. From business strategy development through application deployment, Hitachi Consulting is committed to helping clients quickly realize measurable business value and achieve sustainable ROI.

imason

www.imason.com

Founded in 1999, imason is a privately held IT consulting firm with Microsoft Gold Partner status based in Toronto, Canada. imason's highly skilled and dedicated workers craft major information technology structures that serve the business needs of today. Using modern technology, they collectively create highly sophisticated solutions that dramatically improve their customers' businesses and deliver lasting value.

Productiv

www.productiv.com.au

Productiv sprung from the merger of three leading organizations within the Information Communication Technology industry: Networking Plus, Quattro Technologies Group and Image Process Solutions. They are headquartered in Australia.

Product News



Auditing Features Added to Taxonomy Manager

Based on requests from clients, the upcoming release will include an auditing feature in Taxonomy Manager. A rollback feature has also been incorporated that allows the taxonomy to be reinstated to any previous position in time. This allows a privileged user to cancel out unapproved changes or mistakes (e.g. accidental deletion of a class and all of its clues).

Partner Spotlight - OITUK Ltd.



OITUK Ltd. is a leading provider of Electronic Document Management (EDM), collaborative and workflow solutions to both public and private sectors across the UK and Europe. They specialize in delivering C-Cube Electronic Document Management and Workflow solutions that encompass Electronic Document and Records Management, eDiscovery, Workflow, Electronic Forms, Portal based business applications and collaboration facilities.

OITUK Ltd. has become known for their industry expertise and the award winning functionality in the C-Cube product suite. A consistent focus on the client's business needs coupled with the C-Cube software, OITUK Ltd. has been able to solve challenges for both the public and private sector in proactively managing content to deliver significant value to the organization.

OITUK Ltd. utilizes Concept Searching's technologies to enhance business benefits by integrating automatic classification and taxonomy management. Vijay Magon, Technical Director at OITUK Ltd. is enthusiastic about this partnership, "Concept Searching's technologies complement our products and capabilities and will give our customers additional functionality that can improve compliance and business related activities as well as provide higher relevance when searching for information." For more information about OITUK Ltd. and the C-Cube product suite, please visit their site at www.oituk.com.

Stonebridge Technologies

www.sbti.com

Stonebridge has offices throughout Texas and offers a unique combination of advisory and implementation services designed to help clients get more out of their data, "from the data center to the board room." Their services are structured to directly address the needs of "information consumers" as well as the IT support staff responsible for capturing, managing, delivering, and preserving the company's information assets.

For more information about our partners

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