

The Search Is Over with IDOL:

Frontend and Backend Perspectives

Today's Participants

- **Panelists:**
 - J. Kathleen Hogan, Practice Support Lawyer, Cassels Brock & Blackwell LLP
 - J. J. Sroka, CIO, Duane Morris LLP
 - Maryanna Bell, Manager of IT Practice Application Services, Manatt, Phelps & Phillips, LLP
- **Moderator:**
 - Liza Madden, Director of Marketing, Autonomy iManage Inc.

Agenda

- 9:05 a.m. - 9:10 a.m. Where are we in the IUS/IDOL process?
- 9:10 a.m. – 9:40 a.m. Individual Presentations
 - Kathleen Hogan: Business drivers—what made us move to IUS?
 - John Sroka: First Steps—from a technical perspective, what choices and decisions did we need to make?
 - Maryanna Bell: Implementation—what decisions were made regarding the end-user experience?
- 9:40 a.m. – 9:55 a.m. Questions
- 9:55 a.m. – 10:00 a.m. Closing, surveys

Search at Cassels Brock & Blackwell LLP

Business Drivers



CASSELS BROCK
LAWYERS

Five-year Strategic Plan

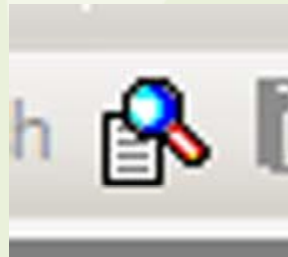
- Increase profitability
- Raise levels of professional capacity
- Increase collaboration and teamwork
- Raise profile

Addition of Practice Support

- No previous KM function
- “What can we do to help you practice *more efficiently?*”
 - Support increasing both collaboration and profitability

Legacy issues

- Main driver: no one could find anything
- Lack of faith in integrity of DMS
- Matter-centric DMS not enough



Answer: SEARCH!

- Provide an easy tool
 - Find personal precedents
 - Leverage individual experience
 - Trustworthiness of results
- Promote firm and PG precedents
- Profile: jumping ahead of “the Joneses”

Nitty Gritty of Searching for Search

- Business needs analysis
- Complex, weighted comparison of two finalists (IUS and Recommind)
- Not easy: ii3 to the rescue!

Winner: IUS

- Cassels already had the iManage DMS
- Did not need expertise locator
- Actually a pretty equal outcome

SearchWell



Legal DB


Search:

[Advanced](#)

Business driver customizations

- Added ability to “filter out” e-mails
- Able to “promote” certain documents to top of results list
- Results based on AD identity

Search Results



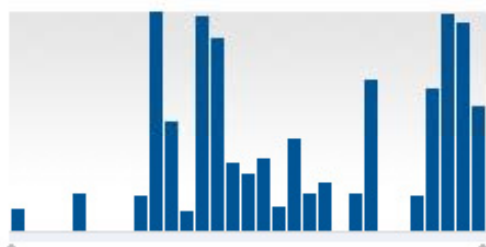
[About](#) | [Help](#)

Legal DB

Search: Go Filter E-mail [Advanced](#)

Refine Results by

Date



Selected: 5/17/2001 - 7/19/2010

Client < 1 of 10 >

Sort by: [Relevance](#) [Last Modified](#) Results 1-10 of about 34,698

⏪ ⏩ page 1 of 20 ⏪ ⏩

NK [PGP - APG Rule 30 - Factum - Document](#)

[Production](#) [preview](#) [workspace](#)

Doc#: 4400353 **Class:** PRECEDENT **Type:** WORD **Author:** dmsadmin

Created: Aug-18-2009 **Modified:** Jun-29-2010

Client: PRACTICEGROUPCONTENT - Practice Group Content

Matter: ADVOCACY - Advocacy Group **Practice Group:** ADVOCACY **Size:** 111 KB

... for Production and to Compel Further and Better Affidavits of Documents) Returnable March 27, 2008 March 19, 2008 Cassels ... of the defendants to serve further and better affidavits of documents, which shall include the above-requested documents, the ...

ius-worksite-DB-Legal-source

OK [PGP - APG Rule 2.01 - Affidavit of Responding Party - Transfer Action to Commerical List](#) [preview](#) [workspace](#)

Doc#: 4400416 **Class:** PRECEDENT **Type:** WORD **Author:** dmsadmin

Created: Aug-18-2009 **Modified:** Aug-18-2009

Client: PRACTICEGROUPCONTENT - Practice Group Content

Matter: ADVOCACY - Advocacy Group **Practice Group:** ADVOCACY **Size:** 53 KB

Adoption

- Immediate and ongoing uptake
- Used in every practice
- Has resulted in anecdotal evidence of time used more efficiently

Next steps

- Back to KM: add more precedents
- Upgrade to IDOL engine
- Tweak according to user requests


Items not Addressed

- DMS workspaces re-designed
- Document clean-up
- Choosing the repositories
- Design

Technical Choices and Decisions

What to Index?

- All 'active' Worksite libraries – 5.5 million documents

 DM1	1,836,500 documents
 DM2	2,302,900 documents
 DM3	1,454,700 documents
 DMADMIN	973,000 documents

- Exchange – 14 million messages
- The Portal – 6,000 pages
- Archived E-mail EAS 29 million messages

Worksite IDOL Requirements

- 2 servers will index in parallel
- Active libraries are 'always available' no reindex downtime

Active Documents

- 5.5 million documents
- 1.5 TB of content
- 32 different types
- Average doc size 275 KB

Archive Documents

- 4.5 millions documents indexed over 3 content engines.
- 160 GB of static content
- Average doc size 51 kb
- Not available in IUS
- 2006 archived everything not edited in 2 years

Worksite Index Hardware

- **Active**

- 2 Indexers
- 3 GHz dual quad core
- 32 GB RAM
- 4 LUNS
- 4 Content Engines for 5.5 million documents

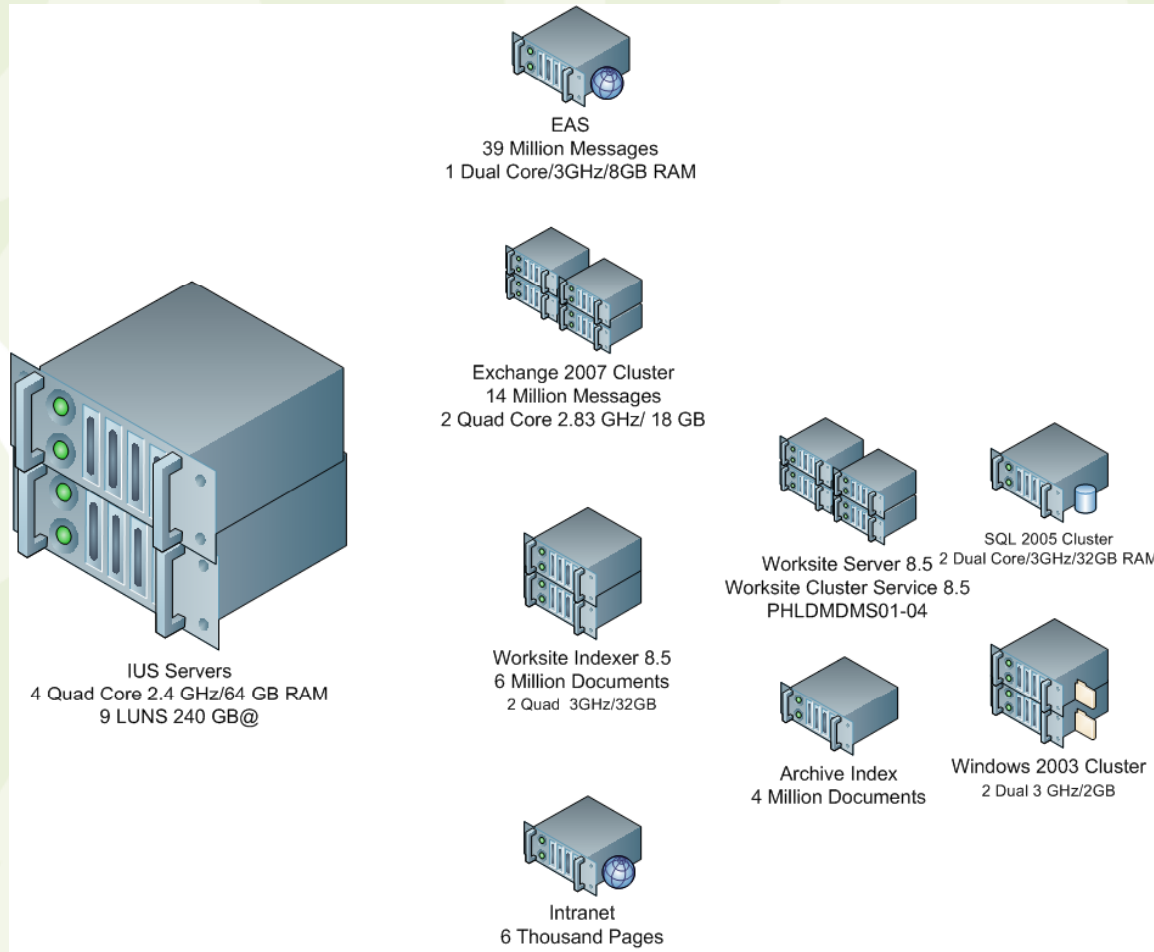
- **Archive Indexer**

- 1 Indexer
- 4 3GHz procs
- 16 GB RAM
- 3 LUN
- 3 Content Engines for 4.5 million documents

IUS Hardware

- 2 Servers to do the indexing, retrieval, and host the interface
- 4 quad core 2.4 GHz processors
- 64 GB of RAM
- Windows 2008 R2 Enterprise
- 9 LUNs that are each 240 GB (4.32 TB)
- No hardware in DR

IUS

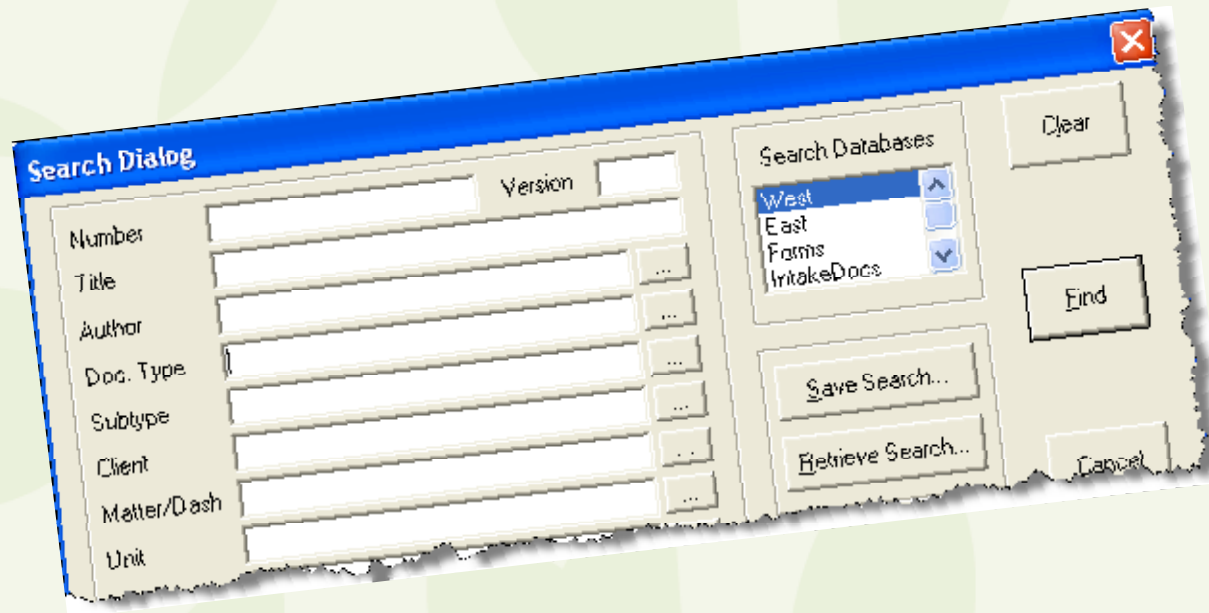


Deployment Plans

- IUS Indexing complete 7/20/10
- Upgrade to Worksite 8.5 end of August
- New desktop 3rd quarter 2010
 - Windows 7
 - Office 2010
 - IUS
 - Lexis for Office
 - Filesite 8.5

Rolling out IDOL and IUS

IDOL in iManage



The Description field is now a full text indexed field

Document searching with IDOL

- Edit the Stop Word list
- Adjust the indexing schedule
- Look at your document Descriptions

Remember...

- Searching for a word will also bring back other words derived from the same root word. This is referred to as stemming.
- For an exact search, use quotes.
- Refer to the Stop Word List for words that will be ignored in your search.
- Special characters can change the results of your search.

Communicate and Educate

I need to find a Form 10-K prepared for my client but a search for 10-K seems to bring up everything except what I'm looking for. Help!

If you have to search by the form number, eliminate the hyphen. IDOL ignores the hyphen (a "special character") and sees the 10 and the k as two separate search terms. A search for 10-k (with the hyphen) in the Title field will find documents with the number 10 and the letter k (by itself) in the title. A search for 10k (without the hyphen) will bring up a more refined result, narrow the search by using the Create/Edit date fields.

Attachments: [Manage Search Stop Words List.nrl \(4 KB\)](#)

I'm searching for a document titled *The Way They Were* and lots of documents are coming up but not the one I'm looking for. What's up with that?

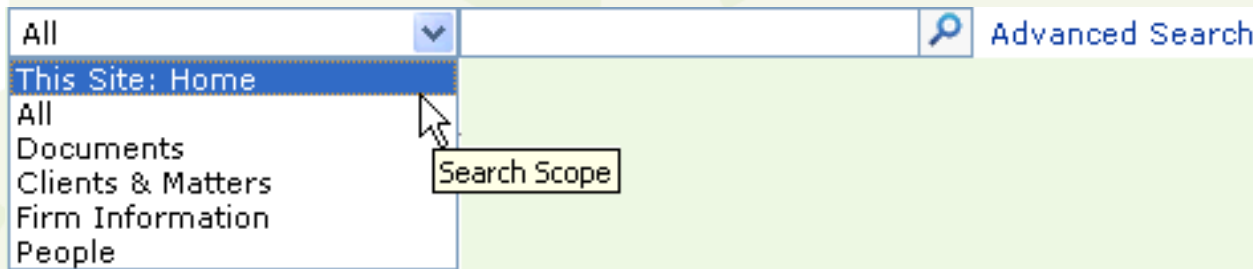
"The", "they", and "were" are all **Stop-Words**. Considered to be too common to be useful in a search, stop-words are ignored by the search engine. This turns your search into one looking for just the word "way". Your document may be in there as well or it may be that the limit for the number of documents to show in a results list is leaving yours behind. Refine the search using other fields. And review the attached stop-word list for words to avoid in the future.

Fast forward to IUS

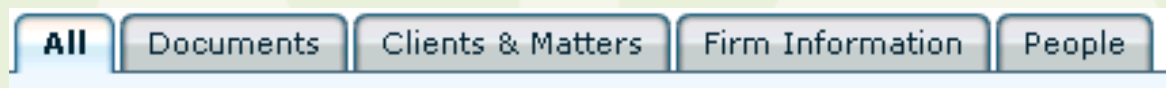
- Started with
 - Document management system
 - Intranet
 - Firm directory
 - Public website

Making IUS Available

- From a search bar on our intranet home page



- To customized tabs in IUS



Related Concepts

- They were not very related at all
- Without tuning they're "useless"
- Tuning is ongoing

Understand relevance ranking

“IDOL employs sophisticated algorithms based on a combination of Information Theory and Bayesian methods to automatically weight and rank documents by statistical relevance.”

Sandeep Joshi
Autonomy



Thomas Bayes
1702-1761

Lessons Learned

- Consider your repositories
- Understand and adjust configuration options
- Invest in training
- Make sure the training includes configuring relevancy and related concepts

Questions?

Thank you!

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