### Monday, May 10, 2010

**Conference at-a-glance**

**WELCOME & KEYNOTE**

- **Fundamentals of Search**
  - Avi Rappoport, Search Tools Consulting
- **Getting the Best From SharePoint Search Implementations**
  - Jed Cawthorne, Canadian Tire Corp.
- **Technical Deep Dive Into Search for SharePoint 2010**
  - Miles Kehoe & Mark Bennett, New Idea Engineering
  - Jason Fried, Microsoft, & Natalya Voskresenskaya, Acrois

### Tuesday, May 11, 2010

**CONTINENTAL BREAKFAST**

- **Enterprise Search Showcase**

#### WELCOME & KEYNOTE

- **A Look at the Human Face of Search**
  - Marti Hearst, Author, Search User Interfaces

### Wednesday, May 12, 2010

**CONTINENTAL BREAKFAST**

- **Enterprise Search Showcase**

#### KEYNOTE

- **Search and Discovery Patterns**
  - Peter Morville, Author, Search Patterns: Design for Discovery

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MONDAY
MAY 10, 2010  pre-conference workshops (separately priced or with a Gold Pass)

W1  >  Fundamentals of Search
9:00 a.m. – 12:00 p.m.
Avi Rappoport, Principle Consultant, Search Tools Consulting
This workshop situates search, especially simple full-text search, within information management, identifying strengths and best use in enterprise search, intranets, portals and e-commerce, and large informational websites. A practical overview, this workshop has focused on how search technology and user experience. Elements of search covered include robot spiders, database connectors and other tools for locating content, indexing issues, query parsing, retrieval, relevance ranking, and designing usable search interfaces. The workshop addresses common search problems and solutions, security issues, languages, new interface elements, and new technology, such as near-real-time search and multimedia search.

W2  >  Getting the Best From SharePoint Search Implementations
9:00 a.m. – 12:00 p.m.
Jed Cawthorne, Senior Specialist, IT Knowledge Management, Canadian Tire Corp.
The coming year is going to be an important transition year for SharePoint search managers as they seek to get the best out of their MOSS07 application and take a view on a migration to SharePoint 2010. This workshop will take a practical viewpoint on how to get the best from current SharePoint search implementations, outlining third-party options available, and highlighting the issues that need to be considered in assessing the upgrade roadmap. Technical and governance issues will be considered and participants will be encouraged to exchange their own experience in searching SharePoint.

W3  >  Developing a Taxonomy, Categorization Catalog, and Faceted Metadata Platform
1:30 p.m. – 4:30 p.m.
Tom Reamy, Chief Knowledge Architect, KAPS Group
Text analytics (categorization, entity extraction, and sentiment analysis) is becoming an essential part of search as an enterprise platform for information applications, along with taxonomies and a rich set of metadata facets. However, there are a wide range of issues that must be solved in order to produce a well-integrated solution. The payoff for putting resources into this complex task, however, literally can save organizations millions of dollars a year. Attendees will be taken through the process of creating a tax analytics-search platform—from how to select the right software to required resources, taxonomy, and categorization development. The workshop will include a series of hands-on exercises in which participants will explore how to develop rules and refine them. We will end with a discussion of how your new taxonomy-categorization catalog can be integrated with enterprise search and how it can be a foundation for integrating search into a wide range of applications.

W4  >  Technical Deep Dive Into Search for SharePoint 2010
1:30 p.m. – 4:30 p.m.
Miles Kehoe, President, & Mark Bennett, CTO, New Idea Engineering
Jason Fried, Senior Product Manager, Microsoft
Natalya Voskresenskaya, Co-Founder, Acrovis LLC
This workshop will cover the steps necessary to move to SharePoint 2010 for search using FAST Search Server for SharePoint 2010, starting with a fresh installation. In addition to setting up simple search for a small website, this workshop will focus on the steps required to use the expanded capabilities of FAST ESP in a variety of environments. Topics to be covered include quick start; advanced content indexing customizing search results with and without web parts; faceted search; query tuning; social search; search profiles; integration; secure search; federation; and more. Attendees will come to understand the unique benefits of FAST ESP search, how to configure and manage search in production environments, and how to scale ESP as content expands to the enterprise level.

TUESDAY
MAY 11, 2010  WELCOME & KEYNOTE

A Look at the Human Face of Search: Designing the User Interface
Marti Hearst, Professor, University of California-Berkeley; Author, Search User Interfaces
9:00 a.m. – 9:45 a.m.  SUTTON CENTER
Most discussion of information retrieval focuses on the algorithms behind search engines and information retrieval systems. However, there’s another side to search: the human users and the tools they use to interact with them—the search user interface. Because of their global reach, search user interfaces must be understandable by and appealing to a wide variety of people of all ages, cultures and backgrounds, and meet an enormous variety of information needs. Hearst will discuss the human side of the information-seeking process and focus on the aspects of this process that can best be supported by the user interface. She will describe the methods behind user interface design generally, and search interface design in particular, with an emphasis on how best to evaluate search interfaces to deliver maximum value from the wealth of information inside your enterprise.

Rapid Innovation Through Search & Real-Time Collaboration
9:45 a.m. – 10:00 a.m.  SUTTON CENTER
Rajat Mukherjee, Group Product Manager, Enterprise Search, Google, Inc.
In the 21st century, innovation is going to be the key driver of success. While this is being granted for the high-tech industry, it is becoming important in other industries as well. The leading companies of tomorrow are those which innovate and move faster than their competition. In such a fast-moving world, being able to effectively collaborate in real-time across countries and continents makes a big difference. And having the right tools is a big part of it. This talk will explore the close relationship between innovation, search, and real-time collaboration, looking both internally at Google and externally at Google’s customers.

Discover the Next Opportunity for Growth
10:00 a.m. – 10:45 a.m.  SUTTON CENTER
David White, Senior Research Analyst, Aberdeen Group
The stakes are high for effective information retrieval. This session will present findings from Aberdeen Group’s research report, “Enterprise Search: Discover the Next Opportunity for Growth,” released in September 2009. Research showed that top performing organizations using enterprise search were able to achieve a 6-hour reduction in the time individuals spent searching for information and a 15% reduction in customer support costs, year-over-year. By comparison, the remaining organizations showed only a 1-hour reduction in the time individuals spent searching for information and a 3% year-over-year increase in customer support costs. White will identify the key strategies and capabilities that enable organizations to gain value from search. Attendees will be able to benchmark themselves against their peers and understand the specific areas they can address to improve the gains delivered by enterprise search.

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blocks encountered along the way.

The presented criteria and methodologies used in evaluating enterprise search platforms developed and the evaluations run in house by the team to ensure transparency and validity. This case study will present the criteria and methodologies used in evaluating enterprise search platforms for the AMGEN corporate intranet as well as share the surprises and roadblocks encountered along the way.

A-2  Expanding Our Notion of Search
Lisa Derenthal, Director, Gimmel Group

For years, the energy sector and other industries and government entities involved in natural resource management have used "spatially aware" tools to manage data. Technologies such as Geographic Information Systems (GIS) owe their existence to the demands of these industries and the need to create, manage, and access data using geography or location. In the energy sector, the single most important aspect in oil and gas upstream operations is location. For this reason, enterprise search solutions for the upstream energy sector are effective only if our notion of search is expanded to include spatial and structured search capabilities. Derenthal will present a study of an international energy company, covering the business drivers, content types, projected data volumes, and technology suite implemented to create a solution built on an enterprise search platform.

A-3  Searching the Past
Christine Maxwell, President, DigitalWorks 4 All Inc.

The world is rushing to digitize everything. We understand how to preserve paper but are out in the cold as far as being able to preserve digital content so that future generations can not just view, but also search through, that content to find whatever it is they are looking for. We need to think about more than just improving search for the here and now, and architect very differently to ensure that what we can search for now will still be able to be searched for and found well into the future.

B-1  Search Governance Models and Methods
Denise Bedford, Goodyear Professor of Knowledge Management, Kent State University, IAKM

Too often today, people think of search as a project rather than an ongoing program or operation. Search needs to be managed like an operation and a program; this means that there has to be overall coordination or governance of the search environment. There are four areas of search that benefit from governance, each of which has different models, processes, roles, and metrics. As the search environment matures, an organization can mature its governance model. This presentation will address basic assumptions of governance, governance at the institution and the application level, the applicability of data management governance models to search systems, and the alignment of governance with metrics.

B-2  Remembering and Using the Information You Have
Ayelette Robinson, Practice Resources Attorney, Morrison & Foerster LLP

In these challenging economic times, it is more important than ever to leverage every byte of your organization’s information to improve business processes. Indeed, the current climate has encouraged us to revisit our existing systems to maximize productivity with what we have. Attend this session to see how the global law firm of Morrison & Foerster LLP has improved decision-making processes and streamlined operational practice by managing the organization’s existing store of legal and business information. Maximizing the benefits of its enterprise search system, Morrison & Foerster brings to each attorney’s fingertips key content and metadata needed for daily practice.

B-3(a)  Bringing Real-Time Search to the Enterprise
Walter Underwood, Lead Engineer, Mark Logic

Fast-paced organizations need accurate, timely search. Traditional search engines index information in batches, with unavoidable and often unacceptable delays. True real-time search includes each update to information as soon as it happens. This allows enterprises to store and search social media, financial data, and office documents without frustrating, costly workarounds for delayed indexing.

B-3(b)  Deploy Semantics for Better Productivity
Daniel Fallmann, Managing Director, Mindbreeze

Gaining competitive advantage is crucial for your success. You have to be faster and better! Leveraging semantic interrelation of information objects will help your organization achieve better productivity. This session will provide examples of how companies quickly and effectively deployed semantic solutions to achieve competitive advantage.

LUNCH BREAK  1:00 p.m. – 2:15 p.m.

B-4  Comparing Enterprise Search Architecture Approaches
Avi Rappoport, Principle Consultant, Search Tools Consulting

There are a lot of vendors promising enterprise-wide bliss for buyers of their platforms. It’s time to take a step back and think about how they work in the real world. The most common three approaches are universal enterprise search (the same tool for everything), federated search (one search combines results from specified search engines), and eco-niche search (a simple text search overall, with interfaces and easy access to more-specialized search engines). There is no right answer for each enterprise, but attendees will learn from both good and bad examples and will develop critical factors for success.

C-1  Search for Customer Satisfaction at Standard & Poor’s
Peter Bozelli, Lead Search Architect, Standard & Poor’s
Joe Hilger, Practice Manager, Avalon Consulting, LLC

Standard & Poor’s faces the same challenges as many of its customers, such as the need to search across multiple information repositories and improving relevance for both highly targeted structured financial data and unstructured, web-based information. From this case study, attendees will find out how S&P identified the key search features that its customers require—from a demand for pinpoint precision to a desire to browse—and learn more about how the team implemented features such as search auto-complete, guided navigation, search applications, and searching different repositories.

C-2  Enterprise Search With Scale, Performance and Control
Shinya Suzuki, Manager IT Infrastructure, Middleware Department, Mitsubishi Corporation

Mitsubishi Corporation realizes large-scale improvements in business efficiency with a new document retrieval system based on Oracle Secure Enterprise Search. The new company-level search, spanning millions of documents, delivers high performance, is compatible with existing software applications, and preserves existing document access control.

C-3  Improving Findability Inside the Firewall
Bob Boeri, Senior ECM Consultant, Guidant Technologies

Improving findability inside the firewall requires a holistic, integrated strategy that goes beyond selecting and installing an enterprise search solution. Challenges include content growing out of control, security requirements, and legal imperatives such as electronic records management and e-discovery. Business, IT, and records managers have different and often conflicting approaches to these problems. Although there is no quick fix to tame the findability beast, this presentation draws on the real-world experiences of a consultant and employee in federal agencies and large insurance and biopharmaceutical firms for a strategic approach to improving findability.
TUESDAY
MAY 11, 2010

D-2 ▶ Implementing Enterprise Search at Johns Hopkins
Karen Higgins, Knowledge Manager, Johns Hopkins University
Applied Physics Laboratory
This talk will discuss the selection of an enterprise search application as well as its implementation and the laboratory’s institutional road map for enterprise search. The selection process will be detailed, including the process to narrow the list of possible vendors, developing the requirements list, the vendor demonstration process, selection criteria, and final selection. Specific implementation issues will be discussed including the repositories crawled, indexed, and federated; the complexity of the laboratory’s SharePoint 2007 environment; being an early user of the Open Text LiveLink connector; and metadata.

D-3 ▶ Tools for Taxonomies
Heather Hedden, Principal, Hedden Information Management
The field of search tools can be complex, but so-called taxonomy tools are even more scattered. This presentation provides an overview of the different kinds of software tools there are for manually creating taxonomies, automatically generating taxonomies, incorporating taxonomies into automated indexing/automatic categorization, and incorporating taxonomies into search. Trade-offs often have to be made in certain capability areas of software tools, but different systems can be integrated to achieve the best results in multiple capabilities. Tools that come preloaded with taxonomies will also be discussed.

BREAKOUT E ▶ 4:15 p.m. – 5:00 p.m.
E-1 ▶ Combining Search and Relational Database Technology: A Real-World Example for E-Discovery
Bill Pieser, CTO, LexisNexis Applied Discovery
Nate Treloar, Principal Technology Strategist, Microsoft Enterprise Search Group
Much has been said about the opportunities for bringing together flexible enterprise search with the strict semantics and rich querying capabilities of relational database technology. But are we looking at a new paradigm in information access? In the Enterprise Search Showcase, we will explore this question by looking at a real-world example that combines advanced search (FAST ESP) and relational database technology (Microsoft SQL Server) to power an extreme scale e-discovery platform for LexisNexis.

E-2 ▶ Search for Clarity—Semantic Search for the Enterprise
Lynda W. Moulton, Senior Analyst, Enterprise Search, The Gilbane Group, a Division of Outsell, Inc.
The irony of having to define anything related to semantics will not be lost on this audience, but it is needed. This session will highlight some high-value technologies that are being applied to semantically improve not only search results for people within a company, but also on the web. Describing the differentiators between why and how we use web search versus enterprise content search will help clarify the use of semantic applications for each. Some current cases using semantic technologies will illustrate just how search expectations are being met to solve semantically nuanced retrieval challenges inside the firewall.

E-3(a) ▶ Sharpening Enterprise Search Performance
Keith DeWeese, Taxonomy and Automated Indexing Project Manager, Chicago Tribune
Current information volumes demand automated surfacing of relevant content—and when such content is dynamic, intelligence must be embedded in the operations. Hear how the Chicago Tribune has successfully met this challenge: improving search engine effectiveness by automating key-wording and meta-tagging information, from web channels that cross 20 major U.S. markets.

E-3(b) ▶ Leveraging Your Most Valued Asset: Knowledge
Stacy Monarke, Director of Product Management, Vivisimo
We’ve heard it said, “An organization’s most valuable asset is its people.” Customer-driven firms will answer, “Customers.” Research-heavy organizations may answer, “IP.” The common element is “knowledge,” which comes from many places including customer interactions, employees, consultants, and reports. Learn what issues prevent most companies from exposing and utilizing information’s true value. Several case studies will highlight how significant, measurable value was gained with access to knowledge across global siloed information repositories.

E-3(c) ▶ Search Behavior Analysis
Harald Kirsch, Project Lead, Rayton
While classical site analytics explores how visitors navigate to and within a website, search behavior analysis focuses on insights into what users are looking for in the first place. In addition to giving valuable hints on how to make search itself more effective, it can reveal gaps in the content and point to usability issues. This session will tell you how to implement search analytics in practice and how to integrate it with existing search engines.

WELCOME RECEPTION ▶ In the Enterprise Search Showcase
5:00 p.m. – 6:00 p.m.

SHOWCASE HOURS
Tuesday, May 11 . . . . . . . 8:00 a.m. – 6:00 p.m.
Welcome Reception . . . . . . . 5:00 p.m. – 6:00 p.m.
Wednesday, May 12 . . . . . 8:00 a.m. – 2:15 p.m.

WEDNESDAY
MAY 12, 2010

KEYNOTE
Search & Discovery Patterns
Peter Morville, President, Semantic Studios; Author, Search Patterns: Design for Discovery
9:00 a.m. – 9:45 a.m. ▶ SUTTON CENTER
Search is among the most disruptive innovations of our time. It influences what we buy and where we go. It shapes how we learn and what we believe. It’s also a radically multidisciplinary, creative challenge. In this talk, Morville defines a pattern language for search and discovery that embraces user psychology and behavior, cross-channel information architecture, multisensory interaction, and emerging technology. He identifies design principles that apply across the categories of web, commerce, enterprise, desktop, mobile, and social, and real time. He explains how future methods and user experience deliverables can help us to create better search interfaces and applications today and invent the improbable discovery tools of tomorrow.

KEYNOTE PANEL
In Search of Search
10:00 a.m. – 10:45 a.m. ▶ SUTTON CENTER
MODERATED BY: Susan F. Feldman, Research Vice President, Search and Digital Marketplace Technologies, IDC
PANELISTS:
Jim Cassella, Manager, Global Application Architecture and Strategy, Colorcon, Inc.
Michael Mills, Management Consultant, Kraft & Kennedy, Inc.
Haroon Suleman, Lead Enterprise Search Architect, Mercer
Leading search industry analyst Sue Feldman will lead an executive panel discussion to explore strategic objectives for deploying search in large enterprise settings. Feldman will leverage her deep knowledge of this industry to draw out the underlying challenges of information findability and how search expectations are being met to solve semantically nuanced retrieval challenges inside the firewall.

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This presentation will demonstrate faceted search, search suggestions, and a simplified advanced search query builder. It will also share some of the constraints and trade-offs when developing search in an established bureaucracy.

G-3  Deriving Order From Chaos Through Discovery and Awareness

Thierry Hubert, CEO, Darwin Ecosystems
Bill Ives, V.P. Social Media, Danvinco Systems

The presentation provides a practical application of chaos theory for creating useful content focal points from the chaotic mess of content resources distributed across the web. Several examples will be provided, both from the internet, where socially generated content is exploding, and from the enterprise, where social tools are contributing to content bloom. The examples will illustrate how activity can make information more discoverable and easier to explore through various visualization techniques. The approach can be targeted to specific types of content such as blogs or online news sites, as well as subsets of unstructured or structured content within the enterprise.

COFFEE BREAK  Visit the Enterprise Search Showcase
1:45 p.m. – 2:15 p.m.

BREAKOUT H  2:15 p.m. – 3:00 p.m.

H-1  Get Me on the Plane Safely: Connecting the Dots to Help Prevent Terrorist Attacks

Emil Kaunitz, CEO, Specialty Systems, Inc. (SSI)
Mark Moorehead, VP, Product Management, MuseGlobal, Inc.

The best way to prevent terrorist attacks is before they start (or get off the ground). Intelligence agencies collect huge amounts of data—it’s just not shared—and it’s well-known that data integration isn’t working in the security area. SSI is using sophisticated search and information analysis technology from MuseGlobal to design systems for Homeland Security, CIA, TSA, and other agencies to “connect the dots” so that the right information is in the right hands at the right time. This involves collecting, normalizing, and enhancing data in real time for humans to make informed security assessments.

H-2  Sustainable Search at DuPont: One Tool Meets the Needs of Many

Alicia Shortridge, Title Project Mgr., Information & Computing Technologies, DuPont

At DuPont, creating sustainable solutions is at the core of its business, both externally and internally. DuPont’s IT staff identified the need for a highly accurate and intuitive search tool that provided a customized fit that would meet a wide range of needs for its global users. Instead of developing custom apps for disparate groups, the company was able to adopt one search tool to deliver a rich search experience to many.

CLOSING KEYNOTE

The Future of Search
Leslie Owens, Analyst, Forrester Research, Inc.
3:15 p.m. – 4:00 p.m.  SUTTON CENTER

The broad category of enterprise search is finished. First-generation enterprise search was not easy to use and produced unsatisfactory results from a usability and relevance standpoint. Today’s knowledge workers demand role-specific, contextual search anywhere they work. In this closing keynote, Owens will provide insight into how to “right-size” an enterprise search project for different roles, application areas, and scenarios; what the future of search will look like as it becomes essential plumbing in a multimodal, heterogeneous content architecture; and why next-generation search initiatives can—and should—thrive in a challenging economic climate.
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Showcase hours

Tuesday, May 11
8:00 a.m. – 6:00 p.m.

Wednesday, May 12
8:00 a.m. – 2:15 p.m.

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