Understanding and Choosing an

Information Retrieval (IR) System

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Step 1: Define Retrieval Needs

- [ ] Identify document types (text, images, OCR, multimedia)
- [ ] Determine retrieval frequency and scale
- [ ] Clarify if metadata or exact location-based access is preferred

Step 2: Select Retrieval Approach

- [ ] Evaluate Path-Based Retrieval: Determine if straightforward, hierarchical organization meets requirements
- [ ] Evaluate Point-Based Retrieval: Assess the need for metadata-driven, flexible retrieval options

Step 3: Choose Supporting Technologies

- [ ] Research available systems (e.g., M-Files, DocuWare, SharePoint)
- [ ] Decide if OCR or image-based retrieval is essential
- [ ] Consider AI or machine learning capabilities for advanced search

Step 4: Address Data Management and Quality

- [ ] Standardize metadata schema for consistency
- [ ] Implement quality control for OCR and text data accuracy
- [ ] Plan for scalable indexing methods

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Step 5: Ensure Compliance and Security

- [ ] Define role-based access and permissions for sensitive information
- [ ] Ensure the system meets relevant data privacy regulations
- [ ] Create a Incident Response Plan

Step 6: Evaluate Real-Time Infrastructure Needs

- [ ] Determine infrastructure capacity for real-time search if needed
- [ ] Consider caching or parallel processing solutions
- [ ] Build a dependable system for monitoring and alerting

Step 7: Conduct System Testing and Training

- [ ] Perform trial searches with sample documents to evaluate ease of use
- [ ] Train staff on retrieval techniques (e.g., Boolean searches, metadata use)

Step 8: Implement and Monitor

- [ ] Set up monitoring for retrieval performance and accuracy
- [ ] Gather user feedback for potential system improvements
- [ ] Implement security information and event management (SIEM) solutions.

Ready to see it in action?

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