

## CASE STUDY

# **Casey Family Programs: SharePoint Integration with Azure AI Search**

**Discover how Casey Family Programs leveraged Armely's expertise on Cognitive services to improve their document retrieval and search experience, making it easier and more secure to retrieve and interact with their SharePoint documents.**

Casey Family Programs is a national operating foundation focused on foster care and child welfare. Based in Seattle, Washington. they are the nation's largest operating foundation focused on safely reducing the need for foster care in the United States.

Like many other organizations, they encountered major issues in maintaining and retrieving information housed across many SharePoint sites. While SharePoint is a powerful platform for managing document libraries, many organizations struggle to extract and use the data efficiently. Casey Family required a solution that would speed the process, improve search capabilities, and uphold rigorous security requirements.

## CHALLENGES

1. **Managing a Large Volume of Documents:** With numerous documents spread across up to 30 different SharePoint sites, finding specific information was a daunting task.
2. **Search Efficiency:** The existing search capabilities were insufficient for rapid and accurate document retrieval.
3. **Security trimming** required the exclusion of certain websites from search results to prevent unauthorized access to private content.
4. **User Experience:** The company desired an easy search experience that would show relevant links and papers for reference.

## Technologies Used

To tackle these challenges, we used:

- **SharePoint:** As the data source.
- **Azure AI Search:** To provide enhanced search capabilities.
- **Postman REST API:** To connect SharePoint with Azure AI Search
- **Azure App Services:** To create scalable and secure web applications.

## Solution Approach

Working with Casey Family Programs, we designed a solution that leveraged Azure AI Search to index and retrieve documents efficiently and securely.

Key features included:

1. **Comprehensive Document Indexing:** Azure AI Search indexed all documents, improving search speed and accuracy.
2. **Robust Security Trimming:** Ensured sensitive content remained protected by excluding certain sites from search results.
3. **Semantic Search Capabilities:** Provided relevant links and documents, enhancing the user experience.
4. **Interactive Search Interface:** Created a user-friendly interface for interacting with documents.

## Results

The integration of Azure AI Search with SharePoint delivered:

- **Faster Document Retrieval:** Users can now find documents quickly, saving time and boosting productivity.
- **Enhanced Security:** Sensitive information is protected through advanced security measures.
- **Improved User Experience:** An intuitive search interface makes it easy to find and interact with relevant documents.
- **Scalable Solution:** Azure App Services ensure the system can grow with the organization's needs.

## ABOUT ARMELY

We are a technology company focusing on Business Intelligence, Data Analytics, and Visualization, notably on Microsoft, AWS, Salesforce (Tableau), and GCP. We make Big Data Simple for our customers by taking a vendor-agnostic approach to ensure you get the best of the technology. Our vision to Empower Organizations to achieve more through Data allows us to corral data and turn it into actionable insights. We strive to be your strategic partner and adviser in your Business Intelligence, Data Analytics, and Visualization journey.

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