Livelink AI Enablement Approach

Context

EBRD users and systems have a requirement to securely query text and figures in narratives, tables and images across authoritative versions of documents in Livelink, and process such data using natural language.

While the initial use cases focused on mining and exploration of available information, more recent use cases include:

- Targeted information retrieval (e.g specific document type, country, sector, investment product, project, party, and/or time period);
- Extraction of numerical or textual data (e.g. value of the biggest agribusiness project in Turkey, structure of project X);
- Comparison of extracted information against information from other sources.

Recommendations

1. Facilitate migration to Strategic Information Management System

- **Challenge:** The Bank is planning to select and implement Strategic Information Management System (SIMS) in the next two to four years
- **Recommendation:** Ensure the solutions defined prior to introduction of SIMS de-risk migration and minimise rework

2. Maximise business value with agentic AI applications

- **Challenge:** Livelink lacks the required functional capabilities. Although the vendor offers an AI assistant called Aviator, this tool is incompatible with the current Livelink deployment, and testing shows the [product does not meet EBRD requirements](#).
- **Recommendation:** Prioritise delivery of custom applications following agentic AI patterns rather than simple chatbots using Retrieval Augmented Generation pattern

3. Maximise business impact with real-time data access

- **Challenge:** Due to its reliance on similarity search and poor performance on large datasets, Retrieval Augmented Generation architecture pattern is only fit for purpose for knowledge discovery use cases representing a smaller subset of user requirements.
- **Recommendation** Prefer real-time access to Livelink data and search to creation of custom vector indices

4. Empower developers with secure and usable APIs

- **Challenge**: OpenText Content offers standard REST APIs, but EBRD developers face challenges due to lack of native OAuth2 support, poor API usability, and tight coupling to OpenText Content Server internal technical implementation.
- **Recommendations.** Configure OAuth2 authentication in the current OpenText instance to enable secure, modern access; develop custom Livelink API wrappers to improve usability and simplify migration to SIMS; Reuse these custom API wrappers to replace legacy adapters such as BSB and TIBCO ESB Content Server Adapter to improve standardisation;

5. Enhance AI effectiveness with quality data and metadata

- **Challenge:** Effective application of AI to business decisions requires high quality, findable, accessible and integratable data. In practical terms this requires records to be unique and to posses minimum metadata required for their processing (incl. document type, associated business entity Ids, and dates). Qualitative evidence suggests data quality to be uneven, and metadata being available selectively.
- **Recommendations.** Define EBRD record metadata standards to ensure consistency and relevance for AI applications. Establish process-specific documentation standards to improve the quality and usability of records. Procure or develop tools that assist with analysing and preparing record and business metadata for optimal AI performance. Incrementally clean records and enhance metadata quality to unlock greater value from AI solutions.