



# Episerver Search & Navigation

User Guide





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EpiServer Search & Navigation User Guide

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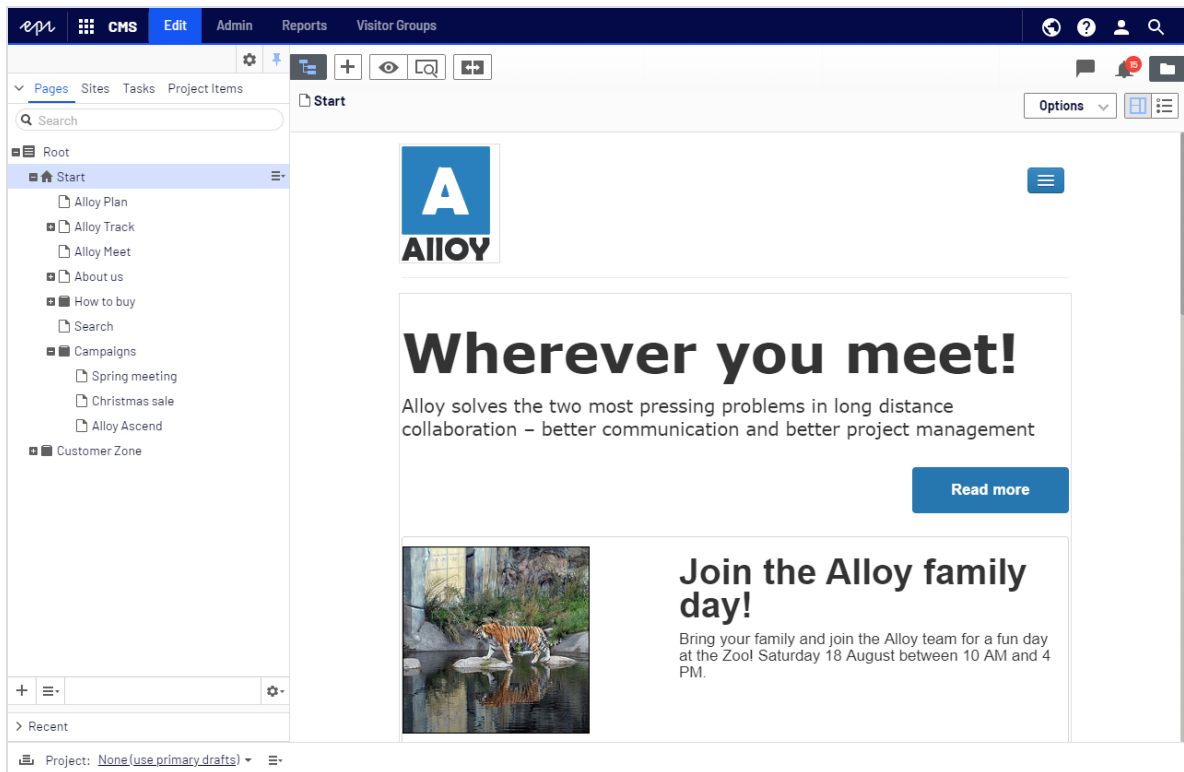
# Introduction

Online help describes the features and functionality of the [Episerver Digital Experience platform](#) and covers CMS for content management, Episerver Commerce for e-commerce functionality, Episerver Campaign for omnichannel campaigns, Episerver Search & Navigation (formerly Episerver Find) for extended search, Episerver Visitor Intelligence (formerly Episerver Insight) for visitor profiles and customer segments, Product and Email Product Recommendations, and Triggered Messages for personalized product recommendations, and Episerver add-ons.

You access the online help from within the Episerver platform or from [Episerver World](#). The online help is also available in PDF format for users who prefer PDF or want to print the documentation.

This PDF describes the features and functionality of Episerver Episerver Search & Navigation, which you can find on [Episerver World](#). Developer guides and technical documentation also are found on [Episerver World](#).

The user guide is intended for editors, administrators, marketers and merchandisers, working with tasks as described in Roles and tasks in the online help.



## Features, licenses and releases

The user documentation is continuously updated and covers the latest releases for the Episerver platform.



Episerver CMS is the core part of the Episerver platform providing advanced content creation and publishing features for all types of website content. CMS features are available in all Episerver installations.



Episerver Commerce adds complete e-commerce capabilities to the core functionality in CMS. It requires a specific installation and license.



Episerver Campaign lets you orchestrate omnichannel campaigns from a single screen, and send triggered emails based on real-time behavior. Campaign requires additional license activation.



Episerver Search & Navigation adds advanced search functionality to websites. It is included in the Episerver Cloud services; for on-premises installations it requires a specific installation and license.



Episerver Visitor Intelligence is a user interface for viewing and filtering visitor profiles, and creating customer segments that can be used in omnichannel marketing campaigns. It requires a specific installation and license.



Product Recommendations lets you create and configure a merchandising campaign with personalized product recommendations from the personalization portal. It requires a specific installation and license.




Email Product Recommendations lets you include personalized product recommendations in any email, including cart abandonment and retargeting emails, from the personalization portal. You can also work with behavioral triggers to detect on-site behaviors and act upon them through automated, personalized emails. It requires a specific installation and license.



Add-ons extend the Episerver capabilities with features like advanced search, multi-variate testing, and social media integration. Some add-ons are free, others require license activation. Add-ons by Episerver are described in the online help.

**Note:** Due to frequent feature releases, this user guide may




describe functionality that is not yet available on your website. See [What's new](#) to find out in which area and release a specific feature became available.

## Images and screenshots


The Episerver user guide uses images and screenshots to visually guide you through the features of the Episerver platform. Due to different versions, continuous updates, and specific system permissions, images and screenshots may differ from the actual appearance.

## Notes


Three types of notes are color marked throughout the user guide: tips, notes and warnings.



**Tip:** Green indicates tips that might show you an easier way to perform a task.



**Note:** Yellow indicates important information that may affect your work and should not be missed.



**Warning:** Red indicates warnings. If these warnings are ignored, serious errors or problems may occur.

## Copyright notice

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## What's new?

This user guide describes functionality available in the latest release of a standard implementation of the Episerver platform software and services. New features are continuously made available. See [Episerver updates](#).

**Note:** Due to frequent feature releases, this user guide may describe functionality that is not yet available to you. Contact your system administrator for information about products and versions in your Episerver implementation.

This release of the Episerver User Guide describes features available in Episerver as of 2020-10-05. See release notes (below) for update history. See Archived documentation in the online version of the user guide for previously released user guides and for older release notes.

## Release notes 2020

Released	Area	Features and updates
2020-10-05	Personalization	A repurchase strategy was added to the daily trigger options.
2020-10-05	Episerver platform	A globe icon  has been added to the top menu. This icon takes you to your live sites. ( <a href="#">update 335</a> )
2020-09-24	Campaign	See Deliverability basics for information about SMTP codes and error messages.
2020-09-17	Episerver platform	An introduction to the Episerver Labs concept has been added.
2020-09-02	CMS	Improvements to the projects feature ( <a href="#">update 328</a> ):

Released	Area	Features and updates
		<ul style="list-style-type: none"> <li>The Versions gadget now displays if content versions are associated with projects.</li> </ul>  <ul style="list-style-type: none"> <li>You are now notified if there are versions of the current content item associated with other projects:</li> </ul> 
2020-09-02	Campaign	<p>If you forget your password or PIN, you can reset them without contacting customer support. See <a href="#">Resetting password and PIN. (update 332)</a></p> <p>In Deep Analytics, you can show the ID instead of the name for the client, mailing and recipient list groupings. (<a href="#">update 332</a>)</p>
2020-08-21	Campaign	<p>You can now use an existing target group as template when creating a new target group. (<a href="#">update 330</a>)</p> <p>If you use unsubscribe lists based on recipient lists, you can choose whether to export global unsubscribers that are not assigned to any particular recipient list or unsubscribers that are assigned to one or more recipient lists. See <a href="#">Exporting recipients. (update 330)</a></p> <p>A video on how to create a double opt-in process has been added.</p>
2020-08-21	Personalization	<p>A Content Recommendations FAQ has been added.</p>
2020-08-12	Commerce	<p>On the Order Management screen, you can create payment plans. (<a href="#">update 328</a>)</p>

Released	Area	Features and updates
2020-08-12	Personalization	Email Content Recommendations is a new Personalization feature that lets you deliver relevant content to your customers by email. ( <a href="#">update 326</a> )
2020-08-12	Campaign	See Deliverability basics for information about blacklists and blacklisting.
2020-07-22	Campaign	In the Recipient history, you can now irrevocably delete recipient data according to GDPR regulations. ( <a href="#">update 326</a> )  Changed user management: You can only assign roles to users, not individual permissions. ( <a href="#">update 326</a> )
2020-07-02	Episerver platform	The new topics, Providing product recommendations and Providing content recommendations, have been added.
2020-06-25	Campaign	The new topic Scheduled jobs in the support section informs about the possibilities to set up scheduled import and export jobs and other features using the new <a href="#">online forms on Episerver World</a> .
2020-06-25	Commerce	The beta phase of the Order Management screen has been expired. Customer service representatives can perform common tasks on carts, orders and payment plans.  On the Order Management screen, you can now add a new shipping address to a customer's order without editing an existing address or adding a new address to the customer's address book. ( <a href="#">update 321</a> )
2020-06-12	Languages	Added Connecting to the auto-translation service to Episerver Languages. ( <a href="#">update 319</a> )
2020-06-12	Personalization	Personalization user interface has been updated. ( <a href="#">update 318</a> )
2020-06-12	Campaign	A new topic, Using marketing segments as target groups for mailing campaigns, has been

Released	Area	Features and updates
		<p>added.</p> <p>The new E-commerce integration guide section provides an introduction to working with Episerver Campaign, and integrations with e-commerce systems.</p>
2020-05-28	CMS	A new topic, Best practices for organizing assets, has been added.
2020-05-28	Commerce	Several updates to the Order Management screen, including the ability to easily find carts, customers, purchase orders and payment plans. You can now also create purchase orders and exchange orders on the Order Management screen. ( <a href="#">update 317</a> )
2020-05-28	Campaign	<p>You can use the extended recipient list connector to address more than 100,000 recipients per campaign with Microsoft Dynamics CRM.</p> <p>Deep Analytics: Pivot tables now support HTML5. As some functionalities changed, the documentation was adjusted accordingly. (<a href="#">update 317</a>)</p> <p>Template Kit: You can now change the image quality of the uploaded image in the image bar paragraphs, text/image paragraphs, content interface paragraphs and in the general SWYN settings to adjust the image display in the mailing. In addition, SWYN is now available for WhatsApp and email.</p>
2020-05-14	Forms	You can now disable the replacement of placeholders in rich-text form elements in multi-step forms. ( <a href="#">update 315</a> )
2020-05-07	CMS	You can now turn the A/B testing feature on and off from admin view. ( <a href="#">update 314</a> )
2020-05-07	Personalization	Content Recommendations anonymously tracks visitor activity on a website to build a profiles for each visitor. Analysis of a unique profile lets you

Released	Area	Features and updates
		deliver the most relevant content to each visitor.
2020-04-30	Episerver platform	A new topic, Working with search engine optimization, has been added.
2020-04-23	Campaign	You can change the URL of the confirmation page the unsubscribe link points to. See Unsubscribers. ( <a href="#">update 312</a> )  See Deliverability basics for information about email authentication and encryption.
2020-04-16	Commerce	Customer service representatives can process a return authorization and create a refund for a customer. ( <a href="#">update 311</a> )
2020-04-16	Campaign	In the Episerver Campaign start menu, the Episerver Reach menu item has been renamed to <b>Personalization Portal</b> . The Personalization Portal lets you access Episerver Product Recommendations and Episerver Email Product Recommendations. The Episerver Insight menu item has been renamed to <b>Visitor Intelligence</b> . Episerver Visitor Intelligence lets you view and filter website visitor profiles, and create customer segments. ( <a href="#">update 312</a> )
2020-03-20	Add-ons	The ExactTarget Marketing Automation connector is now Salesforce Marketing Cloud (ExactTarget) and the Silverpop Marketing Automation connector is now Watson Marketing (Silverpop).
2020-03-20	Campaign	The new Opt-in processes feature lets you create and manage opt-in processes and its opt-in emails (registration confirmations). ( <a href="#">update 308</a> )  You can use the <b>Block</b> node in transactional mails to exclude recipients who are on a custom blacklist. ( <a href="#">update 308</a> )
2020-03-20	Add-ons	Marketing Automation has a new Delivra connector. ( <a href="#">update 306</a> )

Released	Area	Features and updates
2020-03-20	Commerce	The scheduled job Collect orders per promotion statistics reworks the collection of order statistics to improve performance. ( <a href="#">update 305</a> )
2020-03-20	Search & Navigation	The product Episerver Find has been renamed to Episerver Search & Navigation throughout this user guide. Note that the old product name 'Find' can still occur in the user interface.
2020-03-20	Campaign	In the <b>Advanced</b> node of the Marketing Automation, you can filter recipients by Insight segments. ( <a href="#">update 306</a> )
2020-03-20	Commerce	On the Order Management screen, you can now process an order return. ( <a href="#">update 305</a> )
2020-03-20	Personalization	<p>Email Product Recommendations: You can add an email product description that has a transparent background. When you use a top-up or fallback, a preview appears. (<a href="#">update 306</a>)</p> <p>Product Recommendations: In generated HTML, you can define the default image size that is sent for empty images that have no products. (<a href="#">update 306</a>)</p> <p>Triggered Messages: You can fire triggers based on locale so you can send emails to customers in the correct language. When you use the <b>AddToGroup</b> or <b>RemoveFromGroup</b> ESP actions, there is no limit to the number of triggers fired by <b>Contact frequency</b>. You can set a limit for campaigns using the SendMessage ESP action. (<a href="#">update 306</a>)</p>
2020-02-20	Episerver platform	A new section, User scenarios, has been added to the user guide describing common cross-platform user scenarios, such as working with products, optimizing search results, or using visitor groups for personalization.
2020-02-20	Campaign	When configuring a Mobile Push message in Smart Campaigns, you can now upload an image or specify an external image URL. ( <a href="#">update</a> )

Released	Area	Features and updates
		<a href="#">304</a> )
2020-02-20	Campaign	In the <b>Advanced</b> node of the Marketing Automation you can limit the number of recipients to whom the mailing is to be sent. ( <a href="#">update 302</a> )
2020-02-20	Commerce	On the Order Management screen, you can now view returns. ( <a href="#">update 299</a> )
2020-02-20	Personalization	You can now prioritize Triggered Messages campaigns.
2020-01-20	Campaign	The new feature SMS processes lets you create and manage SMS processes such as unsubscribing from marketing SMS by sending the keyword <i>Stop</i> or requesting help by sending the keyword <i>Help</i> . ( <a href="#">update 304</a> )
2020-01-20	Search & Navigation	A new topic, Using Personalized Search & Navigation, provides information about the Personalized Search & Navigation product: its benefits, how it works, and how to enable it.
2020-01-20	Campaign	<p>Several updates to the Microsoft Dynamics CRM integration: You can assign Episerver Campaign test lists to check the mailing content before dispatch. The process of preparing the campaign activity for dispatch has been revised. (<a href="#">update 298</a>)</p> <p>Several updates to the Magento 2 integration: Screenshots and names have been adjusted to the new version 1.3.5. (<a href="#">update 298</a>)</p> <p>In the API overview, you can find information about the Episerver Campaign REST API. (<a href="#">update 298</a>)</p>



## Archived documentation

If your Episerver implementation is not on the latest version, you can access previous versions of the Episerver User Guide under Archived documentation in the online version of the user guide.



# Episerver Search & Navigation

**Note:** The [Episerver Customer-Centric Digital Experience Platform](#) contains many features to support you in your daily work. Depending on how your solution is set up, some features described in this documentation may not be available to you. Contact your system administrator to find out more. See [Episerver World](#) for technical information.

Most site visitors abandon a website if they cannot quickly find what they are looking for. With increasing information volumes, menu navigation is no longer sufficient, so search becomes critical for locating information. Episerver Search & Navigation (formerly Episerver Find) adds powerful search functionality to websites. Search encompasses internet search engines (like Bing) and a website's search function.

Search optimization increases the chances of attracting visitors to your website, keeping them there, and getting them to complete an action, such as registering or shopping. This is closely related to search engine optimization (SEO), often referred to as "the process of improving the visibility of website content in the search results."

Episerver Search & Navigation bases search functionality on visitor search behavior and website statistics. Using this information, you can add [automatic landing pages](#), [adaptive navigation](#), and [guided search](#) to increase website traffic and boost conversion rates.

The Episerver Search & Navigation documentation shows search administrators, such as editors and site administrators, how to set up and use Episerver Search & Navigation. It also shows developers how to configure and set up search features.

The screenshot shows a search interface for 'Alloy Meet'. At the top left is the Alloy logo, a blue square with a white 'A' and the word 'Alloy' below it. To the right is a navigation menu with links: Start, Alloy Plan, Alloy Track, Alloy Meet, About us, and Find (which is underlined). Below the navigation is a search bar containing the text '"alloy meet"' and a 'Search' button. A grey banner below the search bar reads 'Search result' and 'Your search for "alloy meet" resulted in 2 hits'. The main content area is split into two columns. The left column has two sections: 'Download Alloy Meet' with a sub-header and a paragraph of text, and 'Installing' with a sub-header and a paragraph of text. The right column is a 'Sections' sidebar with a list of links and counts: All (57), Root (30), About us (15), How to buy (3), Alloy Track (3), Campaigns (2), Alloy Plan (2), and Alloy Meet (2). The 'Alloy Meet (2)' link is highlighted with a blue background.

## Feature summary

With Episerver Search & Navigation, you can develop customized functionality, such as filtering and faceted navigation, based on content properties, such as price or color. Episerver Search & Navigation is based on an index service and interfaces, which can be cloud-based or installed on-premises. Episerver Search & Navigation supports multiple languages.

Episerver Search & Navigation indexes any type of website object, not only web pages. As soon as an author publishes content, Episerver Search & Navigation pushes data to the search engine, making new or updated content available in near real-time.

## Features in "standard" Episerver Search & Navigation

- [View and analyze search statistics](#) for your websites, and use the statistics to optimize search.
- [Explore the site index](#) to see what was indexed and when, and use this information to customize search features.
- [Promote selected content \(best bets\)](#), and manage [search phrases without hits](#).
- Add [related queries](#) to guide visitors in their search for specific content.
- Define [synonyms for similar search phrases](#).
- [Weight content properties](#) to boost search results as desired.
- Support for basic boolean operators, like AND, OR, NOT. Special symbols like + and - are currently not supported. Complex nested combinations have limitations.

## Features in Episerver Search & Navigation Connections Edition

Episerver Search & Navigation Connections Edition lets you add [connectors](#), which index external content that is related to but not part of your website. For purchasing information about the Connections Edition, see [Order Episerver Search & Navigation](#). To learn how to use it, see [Adding connectors](#).

**Note:** See Getting started in the CMS Editor User Guide for logging in, accessing features, and working with the Episerver user interface.

## Help in Episerver Search & Navigation

Episerver Search & Navigation's user interface provides onscreen documentation. To access it, click **Show Help** in the upper right corner.



## What is search optimization?

Search optimization helps site visitors quickly find the right website content. This is closely related to search engine optimization (SEO), often referred to as the *process of improving the visibility of website content in the search results*.

As a Web page's search rank increases, your website receives more visitors.



Episerver Search & Navigation lets you develop customized functionality to create automatic landing pages and different types of adaptive navigation with minimal effort. While Episerver Search & Navigation bases its SEO strategies on site visitor statistics, you can manually implement search optimization on targeted content to enhance the search experience.

## Learn by doing

Most of Episerver Search & Navigation's automatic SEO is based on queries made by site visitors. As the number of queries grows, Episerver Search & Navigation "learns" and bases search suggestions on previous successful queries.

## The new website

When developers set up a website and configure search, they use the programming interface to develop custom filters (along with built-in filters) and faceted search features. Because the site is new, search optimization has few statistics, so you can help visitors by adding search phrase suggestions. See also: [Autocomplete](#).

## The growing website

As your website matures and accumulates search data, use search statistics to analyze search activity. Optimization evolves into monitoring, fine tuning, and promoting content to deliver the right content to visitors.

## Automatic search optimization

You can attract visitors to your website and guide them to relevant content by coding the following features and tagging content properties.

## Automatic landing pages

When you create a campaign, you usually make significant efforts to set up landing pages and display desired content in various places of the website. Tagging and search criteria let you create landing pages that dynamically display relevant content.

## Release notes for Episerver updates

This is an overview of the latest changes included in EPiServer NuGet packages. As a developer working with EPiServer solution information to decide which updates to apply to your project. Refer to [installing EPiServer updates](#) for information on how to install EPiServer updates.

### Changes in EPiServer.Find

Filter by

Bug  Feature  All

Id	Type	Package	Title	Closed
109403	Feature	EPiServer.Find 9.5.0.2999	Customized Search Block	Jul 24 2015
118616	Feature	EPiServer.Find 9.5.0.2999	Be able to scroll content with one scrollbar	Jul 21 2015
127694	Bug	EPiServer.Find 9.5.0.2999	Find does not allow filtering on decimal properties	Jul 17 2015
127058	Bug	EPiServer.Find 9.5.0.2999	Indexing Word documents	Jul 13 2015

#### Products

- CMS
- Commerce
- Facets

#### Packages

- All
- EPiServer.Find

#### Released in version

- All
- 9.5.0.2999
- 9.4.0.2900
- 9.3.1

An automatic landing page (as in the example above) is actually a search page with a small editorial area at the top. Episerver Search & Navigation drives search results through content tagging. Site visitors can narrow down search results using the facets.

Using Episerver Search & Navigation, you can develop customized functionality to provide an SEO-friendly URL for the dynamic landing page, based on visitor-selected facets. Example: if you search for *sweatshirt*, the returned URL includes associated search facets, such as the following [../search/sweatshirt/women/hoodies](#).

## Adaptive navigation

Website navigation often is static and based on a content structure that is well-known to editors but less intuitive to visitors. With search criteria, you can create navigation that displays personalized content based on what is known about the visitor, such as content relations or a registered profile.

## Guided search

EPiServer Search & Navigation can suggest search phrases automatically, based on the behavior of site visitors. Example: searching for *page* returns **people searching for "page" also searched for "web page"**. The [autocomplete](#) feature also provides guided search.

## Optimizing search manually

Although Episerver Search & Navigation performs search optimization automatically, you should regularly monitor search activities on your website to fine-tune search performance and spot discrepancies. You may want override system suggestions to promote specific content.

Use the [optimization view](#) to perform manual search optimization. Optimization may also include modifying website content to achieve desired results. The following scenarios demonstrate how search optimization actions can guide visitors to appropriate content.

### Search phrase does not match wording in content

Example: *basket* instead of *cart*. Help out by [adding a synonym](#).

### Promote selected content

Use best bets to [promote selected pages' content](#). Example: if a visitor searches for *Christmas cards*, a *Christmas special offer* appears at the top of the search results.

### Visitors are not clicking search result links

Low-click frequency may not be a problem—it can indicate that search results provide adequate information. But it also may indicate that the information is not attractive enough. [Work with the content](#) to ensure that an appropriate description appears in search results and SEO requirements are met. Or, [create a best bet](#) with a custom title and description.

### No search results returned because the content is missing

Use search statistics to discover if needed content is missing from your website. This requires a strong understanding of the content. Create the missing content and ensure it appears in search results.



## Content searched for is not on your website but visitors assume it is

If visitors frequently search for content on a related website, add a [connector](#) to index that site's content and merge it with your site's search results.

## Returned results do not contain the search phrase

Add the search phrase to the content, or add [synonyms](#), which let site visitors retrieve content without knowing exact wording.

## Relevant content is found but not displayed at the top

Work with the content to verify that SEO requirements are met. For example, make sure the page has a relevant title, correct and descriptive meta information, and an accurate modification date. Also, make sure the page has relevant keywords and search phrases. Use specific keywords instead of broad, widely-used terms. For example, **agile commerce** (instead of **commerce**) significantly narrows results.

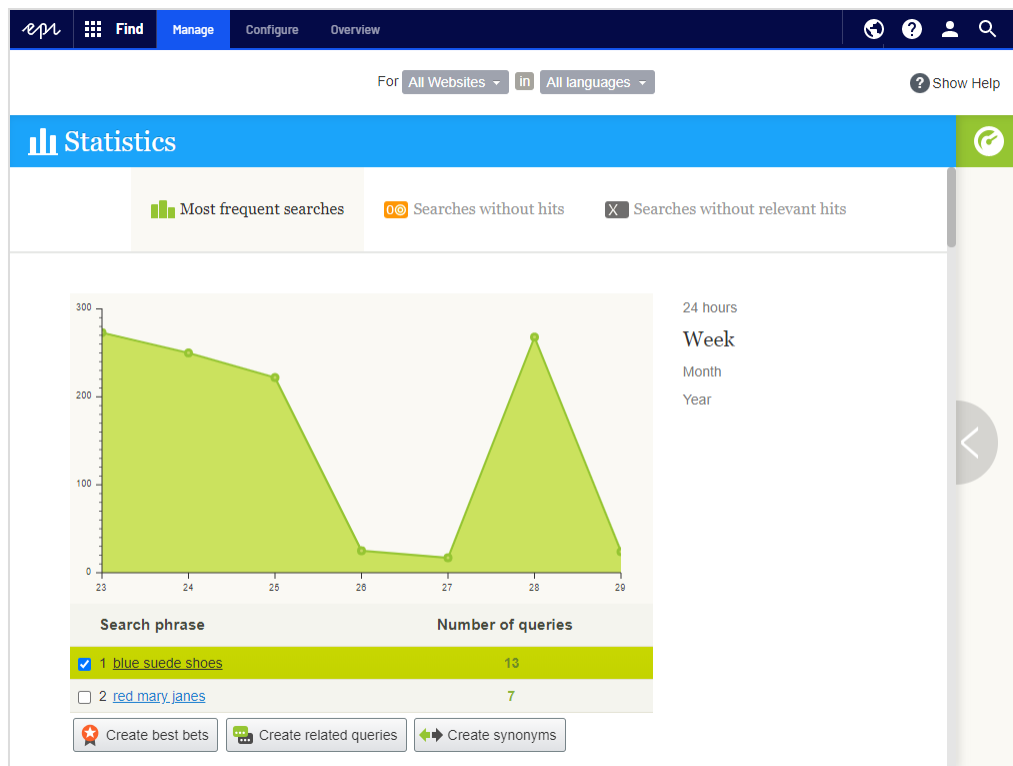
See also general guidelines about optimizing content for search engines, such as Google's [Search Engine Optimization Starter Guide](#).

## Analyzing search statistics

Episerver Search & Navigation collects statistics from site visitor activity and displays them in the Statistics View, where you can analyze the activity.

Statistics are scarce for a new website, but as your site matures and captures more search behavior, you can analyze the information to optimize the search experience.

**Note:** You need [specific access rights](#) to access features in Episerver Search & Navigation.



The Statistics view displays popular searches during a selected time period and reveals if matching content was found. You can filter search information by time interval, website, and language.

- **Most frequent searches.** Phrases searched for most often.

Tip: Use your most frequent search keywords to create [Best Bets](#).

- **Searches without hits.** Phrases most often searched for *and* for which no results were found.

Tip: To improve the user experience for searches without hits, add [synonyms](#), [autocompletes](#) and/or [related queries](#) to help users find relevant content.

- **Searches without relevant hits.** Searches that generated hits but had a low click-through rate. Phrases that are most frequently searched for *and* for which search results are clicked the least appear at the top.

Tip: To improve the user experience for searches without relevant hits, either create new content, or use [related queries](#) or [synonyms](#).

If you click a search phrase in a list, a new window appears, containing the following information.

- matching search results (when using **Most frequent searches** view)
- other searches performed by the visitor who submitted that search phrase

The screenshot shows a window titled "Search phrase 'plan'". It is divided into two main sections. The left section, titled "0 most clicked search results matching 'plan'", contains a table with two columns: "Search result" and "Clicks". The table is empty, with the text "No matching hits." centered below the headers. The right section, titled "People who searched for 'plan' also searched for...", contains a table with two columns: "Search phrase" and "Number of searches". This table lists two related search phrases: "1 work" with 1 search, and "2 lang" with 1 search. A "Close" button is located in the bottom right corner of the window.

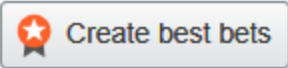
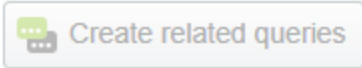
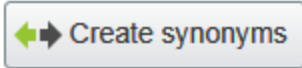
Search result	Clicks
No matching hits.	

Search phrase	Number of searches
1 work	1
2 lang	1

From Statistics view, you can select one or more search phrases and switch to the [optimization interface](#) to work with best bets, autocompletes, related queries, or synonyms.

<input type="checkbox"/>	30 <a href="#">cooperation</a>	1
<input checked="" type="checkbox"/>	31 <a href="#">communication</a>	1
<input type="checkbox"/>	32 <a href="#">ceo</a>	1
<input checked="" type="checkbox"/>	33 <a href="#">bears</a>	1
<input type="checkbox"/>	34 <a href="#">"katt" äter möss</a>	1
<input type="checkbox"/>	35 <a href="#">"katt äter möss"</a>	1

Select one or more phrases in the list and click the desired search optimization method to work on these phrases.



## Manually optimizing search results

Although Episerver Search & Navigation automatically optimizes the search, you should monitor your site's search activities regularly to fine-tune performance and identify trends. At times, you may want to override system suggestions or promote specific content.

When you perform search optimization, work closely with stakeholders such as the website owner, marketers, content editors, and developers. Tasks depend on whether the site is new or mature because of the amount of statistics with which you have to work.

You can perform search optimization for multiple websites and different languages from the same user interface. To optimize search effectively, you must be familiar with your website content.

**Note:** You need [specific access rights](#) to access Episerver Search & Navigation features.

### The optimization view

To access Optimization View, from the toolbar, click **Find > Manage > Optimization**.

For All Websites in All languages Show Help

**Statistics** **Optimization** Apply search optimization features to finetune search on your websites, helping visitors find what they are looking for.

View search statistics based on common search phrases, and use this information to optimize search for your websites.

Best Bets Related Queries Synonyms Autocomplete

Use best bets to create a custom list of matching content for common search phrases. Best bets are presented at the beginning of the search results.

Phrases  Separate multiple phrases with comma

Target content  Local    External link

Title

Description

Display best bet in its own style  Display best bet like search result

**Best Bets**

Alloy Track  
Alloy Track, online risk management where the whole team gets involved in the project plan Involve the whole team! Projects have a natural lifecycle with well-defined stages. Progress monitoring is  
</feature-autocomplete/alloy-track/>

alloy track

Use Optimization View to manually optimize search. You can select search phrases in the **Statistics** view, and transfer them to Optimization View. Or, you can manually enter search phrases into Optimization View's **Phrases** field.

## What to look for

- Frequently-searched phrases indicate "hot" topics, content that visitors assume is on your website.
- Search phrases without hits reveal content missing from your website or a need to [improve a content item's ranking](#) in search results.
- If visitors search for content that is related to but not stored on your website, consider [adding a connector](#) to index an external website.
- Search phrases with low click-through rates may indicate that the content description is insufficient, or that the title or description is not attractive enough. In the latter case, [create a best bet](#) with a custom title and description to promote the content.
- By clicking a search phrase in the list, you see other phrases that the same visitor searched for. For example, if someone searching for **project plans** also searched for

**planning** and **tracking projects**, respond by adding missing content, or creating synonyms or best bets for these phrases.

Using the Statistics View data, try the following content optimization tasks.

- [Promote content using best bets](#)
- [Suggest related search phrases](#)
- [Add synonyms for similar phrases](#)
- [Create editorial autocomplete suggestions](#)



## Promoting content using best bets

Episerver Search & Navigation lets you promote content by adding *best bets*, search phrases that deliver selected Web content to the top of search results. Use best bets to provide answers to common questions, or to create sponsored links such as in an e-commerce site.

For example, if a search phrase has a low click-through rate, that might indicate that the content title or description is not compelling. Use a best bet to assign a custom title and description to promote that content. By customizing title and description, you optimize the site visitor's search experience.

A best bet's search phrase does not need to occur in the assigned content – you are simply mapping one or more phrases to an internal or external Web page, which appears above organic search results.

The image shows two examples of search results for the query 'video conference'. The top example, titled 'Customized title and description', shows a search result for 'Alloy Meet-conduct virtual meetings (0.74982923)'. The description reads: 'Alloy Meet teleconferencing software lets you conduct virtual meetings in "real time" where everyone is participating as the same time, often by teleconference or video conference.' The bottom example, titled 'Standard title and description', shows a search result for 'Alloy Meet (4.0621233)'. The description reads: 'Alloy Meet, online meeting and distance cooperation You've never had a meeting like this before! You've never had a meeting like this before! Participants from remote locations appear in your'.

You can style a best bet to distinguish it from organic results. For example, notify visitors that a link is sponsored.

**Note:** A developer needs to implement this feature in your website's styling.

You can define best bets for a [specific language](#) and a [specific website](#).



## Examples of best bets

- You are running a Christmas campaign. When a visitor searches for **Christmas cards**, you want the **Christmas special offer** page to appear at the top of search results.
- Link search phrases to content that you believe visitors want. For example, for a contact information page, add a best bet with search phrases like **customer service**, **contact us**, and **opening hours**.
- You want a search phrase to return specific content. For example, if someone searches for **health insurance**, display the **health insurance card application form page** on top.
- You have a **Special offers** page, which appears in search results when searching for **offers**, but is rarely clicked. Create a best bet for the page and give it a title like **Unbelievable Deals**, while leaving the original content untouched.

## Adding best bets

**Note:** Best bets are not enabled by default; developers need to enable them.

1. From edit view, select **Find > Manage**. The Statistics screen appears.
2. If one or more search terms that you want to promote via best bets appear in the **Search Phrase** list, select the ones you want, then **Create best bets**. You can modify the search terms on the Optimization screen.

Otherwise, select the **Optimization** screen > **Best Bets** and use the **Phrases** field to enter one or more search phrases.

A best bet phrase cannot contain these special characters: + - && | | ! ( ) { } [ ] ^ " ~ \* ? : \ /

For All Websites in All languages Show Help

**Optimization** Apply search optimization features to finetune search on your websites, helping visitors find what they are looking for.

**Best Bets** Related Queries Synonyms Autocomplete

Use best bets to create a custom list of matching content for common search phrases. Best bets are presented at the beginning of the search results.

Phrases  Separate multiple phrases with comma

Target content  Local

External link

Title

Description

Display best bet in its own style  
 Display best bet like search result

**Best Bets**

**Whitepaper**  
 Alloy Track Whitepaper Explore the opportunities that exist for keeping your projects on track. Making sure that

**Note:** The site visitor must enter all words in the search phrase *exactly* to retrieve the content. Stemming is not supported. If a best bet contains several search phrases, and any of them matches the site visitor's input, the best bet content appears at the top of search results.

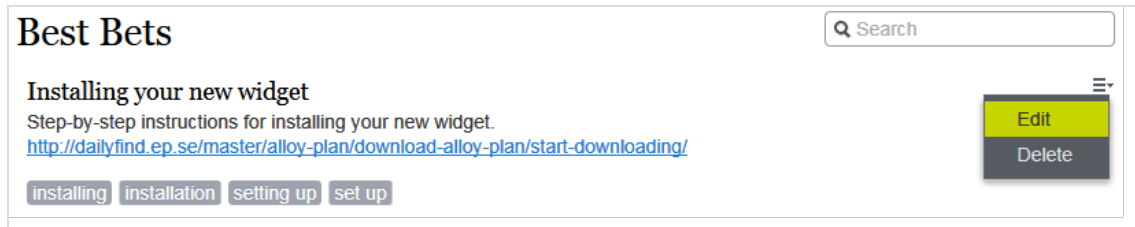
3. At the **Target Content** field, specify content to appear when a site visitor searches for any search phrase. To assign an Episerver page, image, video, or asset, select **Local** and navigate to it. To assign an external page, click **External link** and insert a URL with a protocol identifier, such as **https://**.
4. If you selected an Episerver page, its title and description appear. Modify them as desired. For example, enter more compelling text to encourage a site visitor to click the result.

If you selected an external page, enter a relevant title and description.

## Editing best bets

The bottom of the **Optimization** page displays current best bets.

1. Using the context menu, click **Edit**. The screen is populated with the current values.



2. Change as needed.
3. Click **Save best bet**.

## Deleting best bets

Best bets typically have a limited life, so maintain them continuously to ensure that out-dated promotions are removed.

1. Using the context menu, click **Delete**.
2. Confirm.

## Effect of publication and expiration dates on best bets

Best bets respect content publication and expiration dates, and that information is presented on the **Best Bets** screen.

## Best Bets

Search

**Installing**  
You are installing Alloy Track. You are installing tyAlloy Track.  
<http://dailyfind.ep.se/master/alloy-track/download-alloy-track/start-downloading/>

Content has expired

beautiful

**Fall campaign**  
Read all about the latest, don't miss a beat.  
<http://dailyfind.ep.se/master/fall-campaign/>

fall campaign

**New products**  
Latest updates to our most popular products!  
<http://dailyfind.ep.se/master/new-products/>

Content is scheduled for publishing

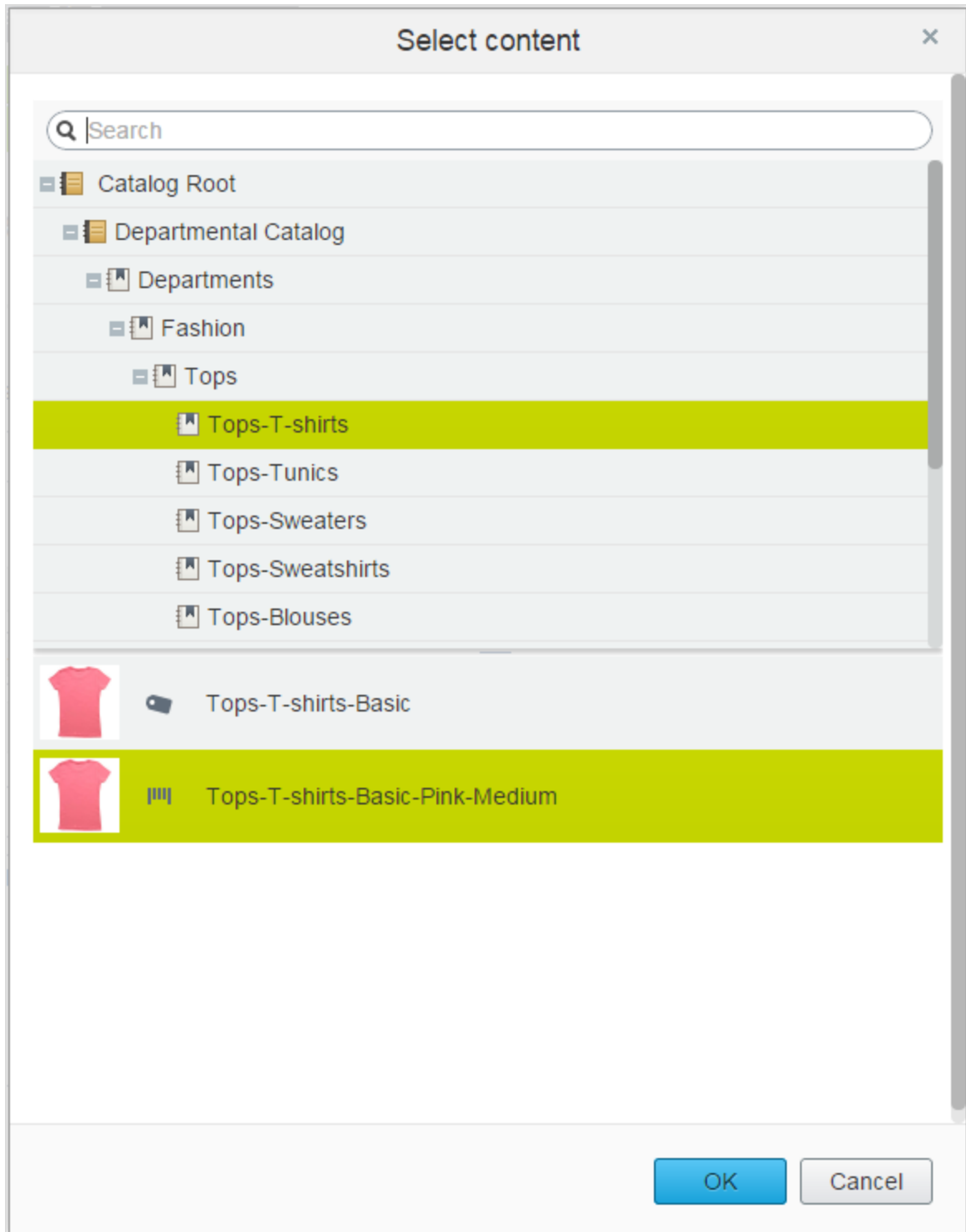
new

So, while you can apply a best bet to unpublished content, the best bet only affects search results if content is published. Also, if published content expires, a best bet no longer affects search results, although you can still see it on the Best Bets screen.



## Best bets for catalog entries

If Episerver Commerce is installed on your website, you can promote content using the catalog content selector in best bets view. You can define best bets for products and variants and images in the catalog.





## Adding related queries

Use related queries to create suggestions associated with a search phrase, guiding visitors to certain search patterns.

Start / Find

black bear

Search

### Search result

Your search for *black bear* resulted in 8hits

People also searched for: polar bear brown bear bear

Episerver Search & Navigation automatically generates suggestions from site visitors who also searched for the same phrase. You can manually add related queries that are not automatically generated because users are not entering those search terms. By manually adding related queries, you create desirable search patterns that are used as the website evolves. For example, on a travel website, to searches for *Spain*, add related queries for *Barcelona* and *Madrid*. Or, on an e-commerce site, to searches for *accessories*, add *handbags* and *shoes*.

## Creating related queries

**Note:** You can apply a related query to a [specific website](#) and a [specific language](#).

1. From edit view, select **Find > Manage**. The Statistics screen appears.
2. If search terms that you want to use for related queries appear in the **Search Phrase** list, select them then **Create related queries**. You can modify the search terms on the Optimization screen.

Otherwise, select the **Optimization** screen > **Related Queries** and use the **Phrases** field to enter one or more related queries.

A phrase can have up to three words, and must consist of alphanumeric characters, dashes, ampersand, or apostrophe.

Use related queries to create search suggestions of the type "persons who searched for this also searched for...". Related queries work in one direction only.

Phrase

Suggestions

Separate multiple suggestions with comma.

### Related Queries

Phrase	^ Suggestions	
bow woods	babboo	<ul style="list-style-type: none"> <li>Edit</li> <li>Move Up</li> <li>Move Down</li> <li>Delete Phrase</li> <li>Delete Suggestion</li> </ul>
	hickory	
	osage	
	ash	
	cedar	
black locust		

- In the **Suggestions** field, enter related terms by which users might want to search. You can apply several phrases to the same query. For example, the search term *training* has *course* and *school* as related queries. A suggestion should not match a phrase.
- Click **Add related query**.
- To change the position of a suggestion, click the context menu then select **Move Up** or **Move Down**. The screen position affects the presentation order of the related queries.

black bear	brown bear	
	polar bear	<ul style="list-style-type: none"> <li>Edit</li> <li>Move Up</li> <li>Move Down</li> <li>Delete Suggestion</li> </ul>
	bear	
bow woods	babboo	
	hickory	
	osage	



## Adding synonyms for similar phrases

Sometimes, site visitors enter a search term that does not occur in your content, even though your site has content of interest to them. To fix this problem, create a *synonym list*. If a site visitor searches for any term in the list, the search returns results for it and the synonym. For example:

- Phrases (terms not in your content but which site visitors submit while searching): *bill, payment, pay, fee*
- Synonym (occurs in your site content): *tuition*

If a site visitor enters *bill* into a search field that uses synonyms, the Synonyms feature adds OR *tuition* to the query. So, content containing *tuition* is returned even though it was not submitted as a search term.

The Synonym feature typically produces more hits. So, while site visitors do no more work, Episerver Search & Navigation greatly increases their chances of finding the right information.

### Examples

- You have a *Special offers* page. It appears in search results when searching for *offer*, but site visitors often enter *deal* when searching. Create a synonym list with phrase: *deal*; synonym: *offer*.
- Phrases: *iPhone, Nexus, Galaxy* (three 1-word phrases)  
Synonym: *smart phone* (2-word synonym)
- Phrases: *email, telephone, people, twitter* (four 1-word phrases)  
Synonym: *contact* (1-word synonym)

### Unidirectional versus bidirectional synonyms

When creating a synonym list, you decide if it is unidirectional or bidirectional.

- **Unidirectional.** If a site visitor submits a phrase on the list, Episerver Search & Navigation adds the synonym to the query. But, if a visitor submits the synonym, phrases on the list are not added to the query.
- **Bidirectional.** If a visitor submits the synonym or any term on the phrases list, the synonym and the term are added to the query.

On the Synonyms screen, an icon indicates a list's direction.



Synonyms	
Phrases	Synonym
adorable, lovely, nice	beautiful
amount, bill, charge, cost payment, price	tuition

### Example

- If *recycling* is a *unidirectional* synonym to *dump*, you get hits for *recycling* when searching for *dump*, but you do not get hits for *dump* when searching for *recycling*.
- If *recycling* is a *bidirectional* synonym for *dump*, you get hits for *dump* when searching for *recycling*, and hits for *recycling* when searching for *dump*.

## Keywords versus synonyms

The advantage of search keywords is that they are used by Episerver Search & Navigation and external search engines (for example, Bing) to retrieve content on your site. However, you must add SEO keywords to each content item.

Synonyms apply to all site content, or content in the selected language, but are only used if someone uses the Episerver Search & Navigation search functionality on your site.

## Adding synonyms

**Note:** Synonyms are usually language-specific but you can apply them [to all languages](#).

1. From edit view, select **Find > Manage**. The Statistics screen appears.
2. If search terms you want to use for synonyms appear in the **Search Phrase** list, click them, then select **Create synonyms**. You can modify the search terms on the Optimization screen.

Otherwise, select the **Optimization** screen > **Synonyms**.

For All Websites in All languages ? S

## Optimization

Apply search optimization features to finetune search on your websites, helping visitors find what they are looking for.

★ Best Bets Related Queries ↔ Synonyms AI Autocomplete

Search terms can be expanded with terms from this synonym list. If you search for "vegetables" and the synonym is "fruit", results for "fruit" will also be displayed. Note that changes to synonyms may take a few minutes before they are in effect.

Phrase

Synonym

Bidirectional

Add synonym Cancel

### Synonyms

Phrase	Synonym
biking,trekking,hiking,climbing,walking	outdoor
cat,dog,mouse,rat	pet
london	england
london	britain
madrid	spain

- In the **Phrases** field, enter one or more synonym phrases that do not occur in your site content but which site visitors might submit while searching. Each phrase can have up to three words. You can enter an unlimited number of phrases. To learn more about phrases and synonyms, see [Adding synonyms for similar phrases](#).

**Warning:** The search term must exactly match a phrase (stemming is not supported). For example, *vegetable* does not exactly match *vegetables*. As a workaround, enter two phrases: *vegetable* and *vegetables*.

4. In the **Synonym** field, enter a term (up to three words) that exists in your website content. Episerver Search & Navigation adds the synonym to the query when a site visitor enters any phrase in the list.
5. If you want the synonym list to be bidirectional, check the **Bidirectional** box. See also: [Unidirectional versus bidirectional synonyms](#).



## Autocomplete

Autocomplete suggests search phrases as a site visitor types characters into a search field.

The screenshot shows a search input field containing the text 'home'. To the right of the input is a 'Search' button. Below the input field, a dropdown menu is open, displaying a list of suggestions:

- Homewood Cottages
- Homeplace Ranch
- Home Care Apartments
- Home Inn Xiamen Jimei University
- Home Way Business Hotel

The suggestion list becomes more precise as a user types more characters.

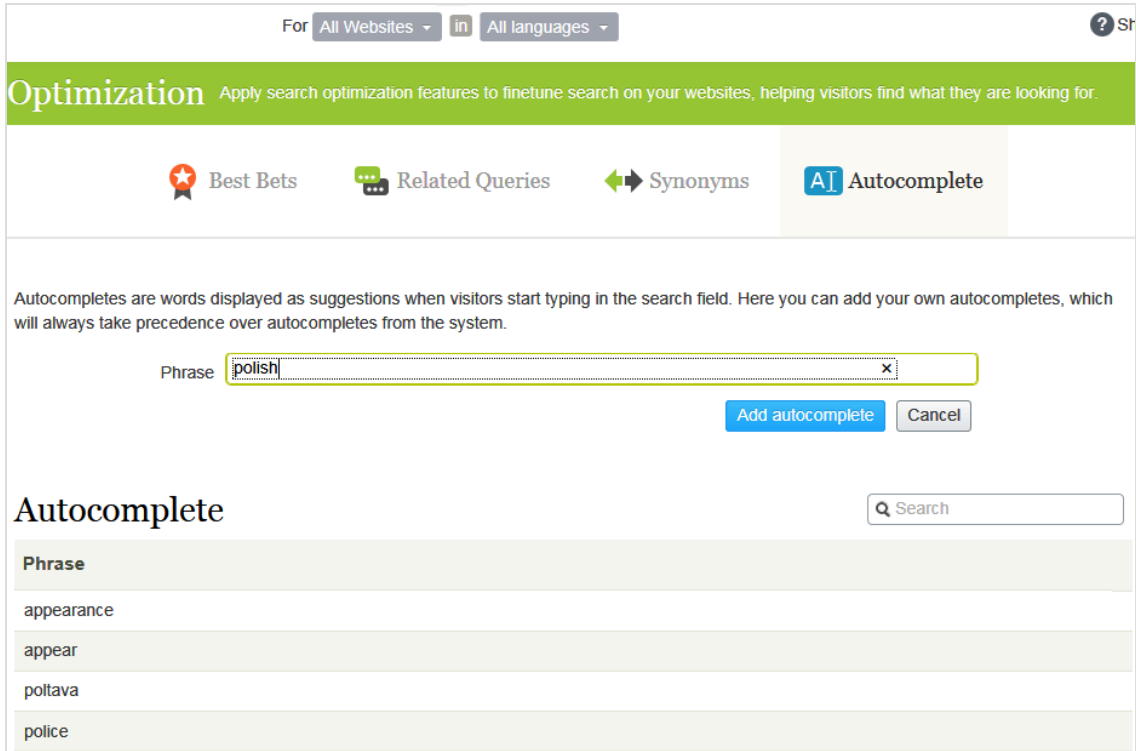
If a site visitor selects a suggestion, Episerver Search & Navigation executes a query using that term. Autocomplete speeds up the search experience when it correctly predicts words being typed.

**Note:** The autocomplete functionality will only work from the beginning of a phrase, the search term must begin with the first word in the autocomplete phrase.

## Sources of autocomplete suggestions

Episerver Search & Navigation provides two sources of autocomplete suggestions.

- Manually entered, on the Episerver Search & Navigation Optimization screen's **Autocomplete** tab.

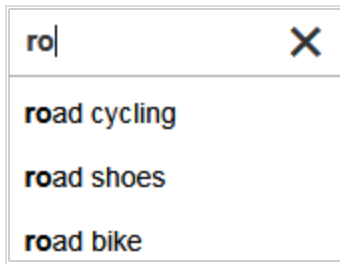


- Automatically generated, based on previous searches that resulted in at least one hit.

Manually-added suggestions take precedence over system-generated ones. For example, if a search for *polic* results in one user clicking a search result that uses *police*, Episerver Search & Navigation makes *police* an autocomplete suggestion for *polic*. But, if you manually add *policy* as a suggestion, that term appears above *police* in the suggestion list.

### Usage recommendations

- Base autocomplete suggestions on search keywords for targeted content. For example, if your website sells bicycles, add the following suggestions to appear when a site visitor types *ro*.



- For a new website, manually add autocomplete suggestions for important words. Even if no previous searches for them were made, the suggestions direct site visitors to appropriate pages.

## Adding, editing and deleting autocomplete phrases

You can define autocomplete suggestions for a [specific language and a specific website](#). To create a suggestion, follow these steps.

1. From edit view, select **Find > Manage > Optimization > Autocomplete**.
2. In the **Phrase** field, enter autocomplete suggestions (one at a time).

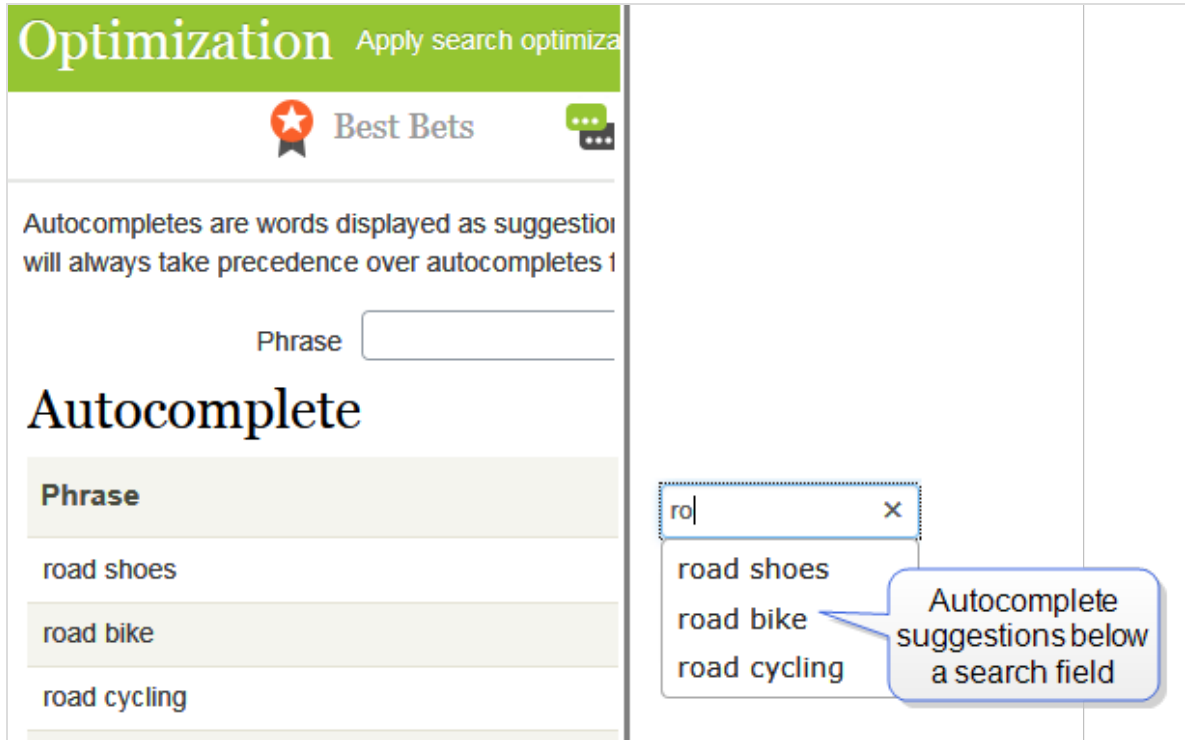
**Note:** The Autocomplete screen displays only suggestions that were manually added on this screen—it does not display suggestions based on previous, successful searches.

Use context menu options to edit or delete an autocomplete suggestion.

After you enter autocomplete suggestions, your developer must update website pages that host search controls to implement Autocomplete.

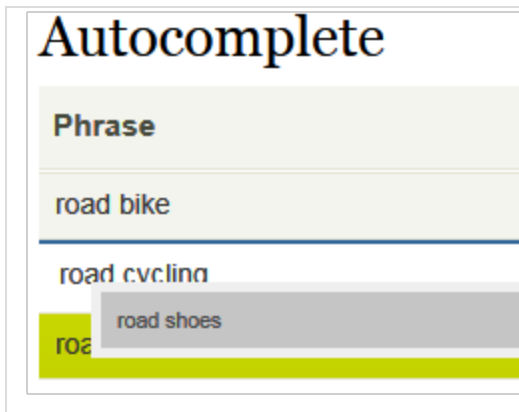
## Changing the order of autocomplete phrases

The order of suggestions in the Autocomplete list determines their sequence in a search field's suggestion list.



To change the order of suggestions, follow these steps:

1. Select the suggestion you want to move.
2. Drag it to the new position.
3. When you see a blue line below the new position, release the mouse button.



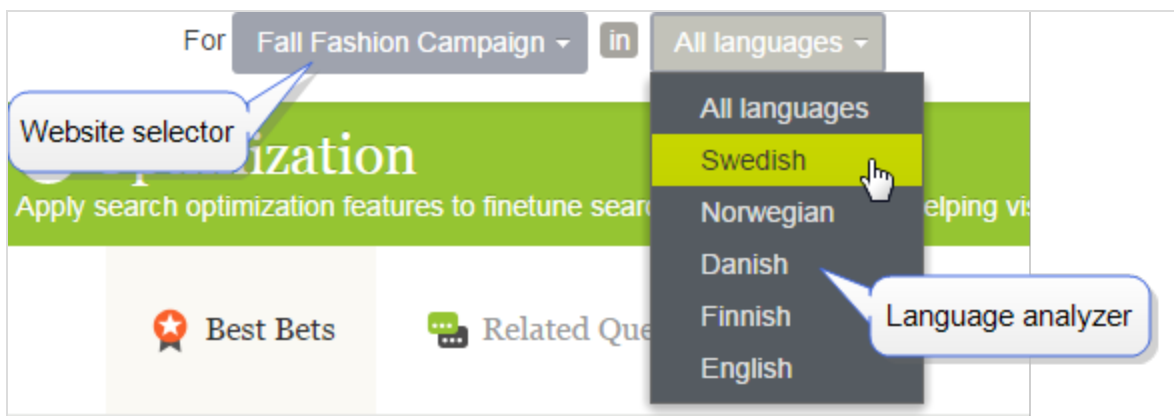


## Optimizing multiple sites and languages

Because search optimization is often language-specific, Episerver Search & Navigation supports multiple languages and websites.

### Filtering on websites and languages

At the top of the most Episerver Search & Navigation screens, use drop-down lists to choose a website and a language analyzer to filter the screen information before performing actions, such as viewing statistics and fine tuning search optimization.



### Episerver Search & Navigation indexes

Episerver Search & Navigation needs only one main index. Multiple websites often share a single index. If you add a website, Episerver Search & Navigation adds new content to the existing index.

In addition to the main index, your Episerver Search & Navigation administrator can set up any number of *language-specific* indexes to increase search precision by employing strategies like word stemming. When content in a language with its own index is saved, Episerver Search & Navigation uses an *analyzer* to interpret and index the content. For example, the English analyzer uses word stemming to identify *fish* as the root word for *fishing* and *fisher*. So, if a user submits a search query that includes *fish*, *fishing*, or *fisher*, the search returns content with any word variation.

In contrast, if a search term matches content in the main index only, it must exactly match an indexed term to return search results; word variations are ignored.

**Note:** The number of supported language analyzers in Episerver Search & Navigation is determined when your organization orders an index and multi-language index support from Episerver. Your site administrator enables the analyzers during site setup.

## *How content from different languages appears in search results*

If site visitors search a multi-language website, each language version of content appears separately in search results.

## Language analyzers versus CMS content language

Your site administrator can enable one group of languages in Episerver CMS, and a different group of language analyzers in Episerver Search & Navigation. This may confuse users because, while the language selector on Episerver Search & Navigation screens might look like you are choosing content language, in reality, you are selecting an Episerver Search & Navigation analyzer.

The language analyzer is used when working with search optimization. Your site content can exist in several languages - they do not all need a language analyzer. However, a search that uses an analyzer is smarter.

Episerver Search & Navigation language analyzers are installed by a developer during implementation at a cost. Additional content languages can be added by a CMS administrator at any time and have no cost.

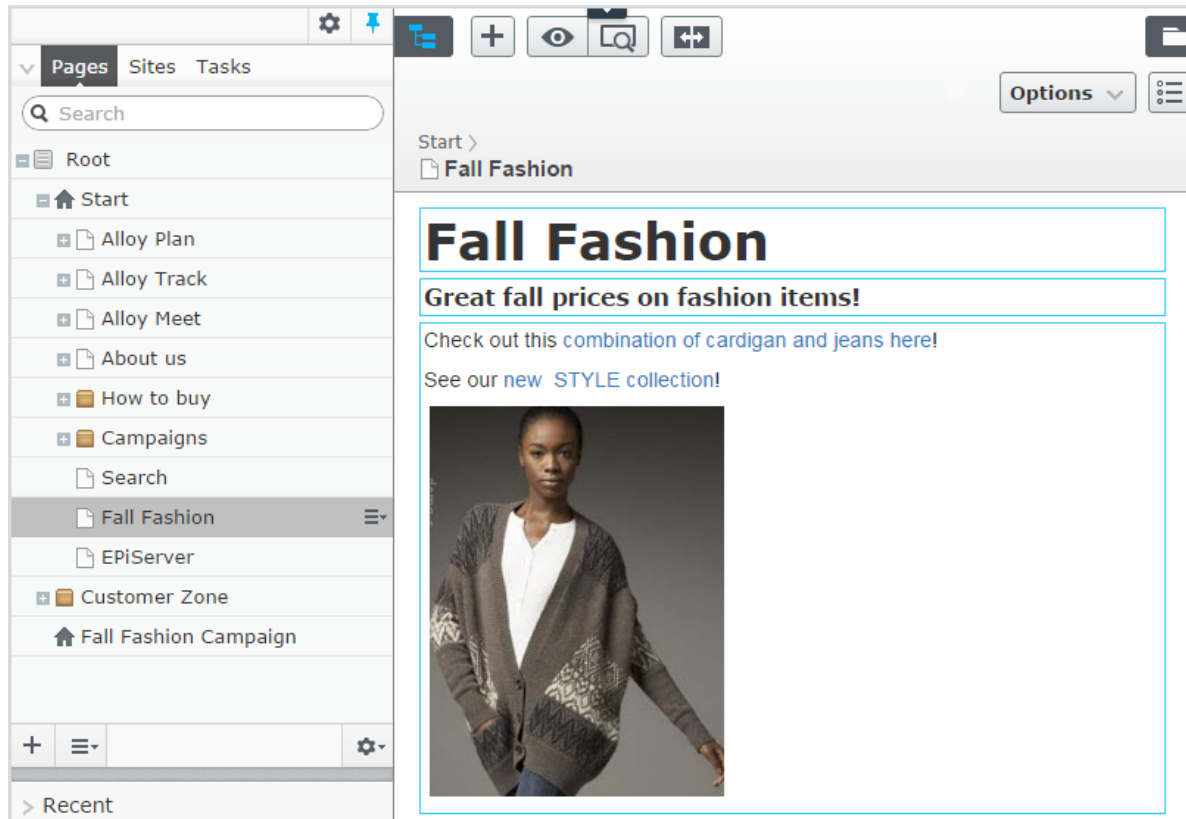
## Examples of multiple websites and languages

The following examples illustrate search optimization with multiple websites and languages.

### *Enabling languages and optimizing search*

You create a *Fall Fashion* page in the master language, in English (see image). Now, you want to enable Danish and Swedish on the website, and translate the page into those languages. You also want to apply search optimization techniques to promote the translated content. It is assumed that you enabled Swedish and Danish in the website's index.





- Translate the page into Swedish and Danish.
- Because you enabled Swedish and Danish in the index, the *Fall Fashion* page appears in results when searching for *tröjor* and *trøjer*, the Swedish and Danish words for *cardigans*, even though the page contains the singular form *cardigan* (*tröja* and *trøje*).
- Create a **best bet** for the *Fall Fashion* page to promote it when someone searches for *cardigans* or *jeans*. You do not have to create best bets for the Swedish and Danish versions — Episerver Search & Navigation automatically displays the translated versions. If a best bet's content is not translated, Episerver Search & Navigation displays the master language version as a fallback language.
- Add *jeans* as a one-way **synonym** for *trousers* in English. If a site visitor searches for *trousers*, the *Fall Fashion* page appears at the top of search results.

**Note:** Because it is a one-way synonym, a search for *jeans* does not return pages containing *trousers*.

- Create the corresponding language-specific synonym pair for *jeans* in Swedish (*byxor*) and Danish (*bukser*).

- Assume that the new *style* brand is replacing the old *XX* brand in the new collection. Add *style* as a synonym for *XX*, applying to *all languages*. Visitors searching for the *XX* brand also see results for the *style* brand, regardless of language.

## Adding websites and optimizing search

This example continues the previous one by creating two new campaign websites with targeted content: one for fashion and one for traveling, in addition to the default website. All three websites share an index and have the same languages enabled.

The screenshot shows the Episerver search interface. At the top, there are filters for 'All Websites' and 'All languages'. A dropdown menu is open under 'All Websites', showing options: 'All Websites', 'Fall Fashion Campaign' (highlighted), 'Fall Travel Campaign', and 'Default Web Site'. Below the filters, there is a green banner with the 'Opti' logo and the text 'Apply search on your websites, helping visitors find what they are looking for.' Below the banner, there are navigation links: 'Best Bets', 'Related Queries', 'Synonyms', and 'Autocomplete'. The 'Related Queries' section is active, showing a form with 'Phrase' set to 'warm' and 'Suggestions' set to 'cardigan,sweater'. Below the form, there are buttons for 'Add related query' and 'Cancel'. At the bottom, there is a 'Related Queries' section with a search bar and a table showing 'juniper' and 'bow woods'.

For  in  [? Show Help](#)

**Opti**  
Apply search on your websites, helping visitors find what they are looking for.

Fall Fashion Campaign  
Fall Travel Campaign  
Default Web Site

[★ Best Bets](#) [💬 Related Queries](#) [↔ Synonyms](#) [AI Autocomplete](#)

Use related queries to create search suggestions of the type "persons who searched for this also searched for...". Related queries work in one direction only.

Phrase

Suggestions

Separate multiple suggestions with comma.

### Related Queries

Phrase	Suggestions
juniper	bow woods

- Enable the desired languages in each new website, so editors can create and translate content in the sites.
- Because the campaign websites are new and have their own URL, the [statistics views](#) are empty until visitors generate traffic and queries.
- All websites share an index, so best bets, related queries, or autocomplete suggestions are already defined the campaign websites.
- Similarly, any language-specific search optimization for all websites also applies to the campaign websites.
- By definition, synonyms apply to all websites. Synonyms can be language-specific, as explained the *style* brand example above.
- Because the campaign websites have different content (fashion and traveling), you can add website-specific [related queries](#). For example, on the travel website, searching for *warm* (English) might suggest tropical destinations, like Jamaica. Searching for *warm* on the fashion website might suggest *cardigans* or *sweaters*.

The screenshot displays the Episerver Search & Navigation interface. At the top, there is a navigation bar with a dropdown menu for 'Fall Travel Campaign' and a language selector for 'English'. A 'Show Help' link is also visible. Below the navigation bar, there is a green banner with the Optimizely logo and the text 'Apply search optimization on your websites, helping visitors find what they are looking for.' Below the banner, there are several icons and labels: 'Best Bets', 'Related Queries', 'Synonyms', and 'Autocomplete'. The 'Related Queries' section is highlighted. It contains a text input field for 'Phrase' with the value 'Warm' and another text input field for 'Suggestions' with the value 'Florida'. Below these fields, there is a note: 'Separate multiple suggestions with comma.' There are two buttons: 'Add related query' and 'Cancel'. Below this, there is a section titled 'Related Queries' with a search input field. A table below the title shows the following data:

Phrase	Suggestions
Warm	thailand
	carribbean

- Add website-specific [autocomplete of search phrases](#). For example, if a visitor enters *car* on the fashion website, an autocomplete suggestion might be *cardigans*. On the travel website, the suggestion might be *car rental*.



# Configuring Search & Navigation

**Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

In admin view, a system administrator or developer can configure these search-specific tasks:

- [Boosting results through properties](#)
- [Clearing the index and reindexing](#)
- [Adding connectors](#)
- [Exploring the index](#)
- [Access rights](#)

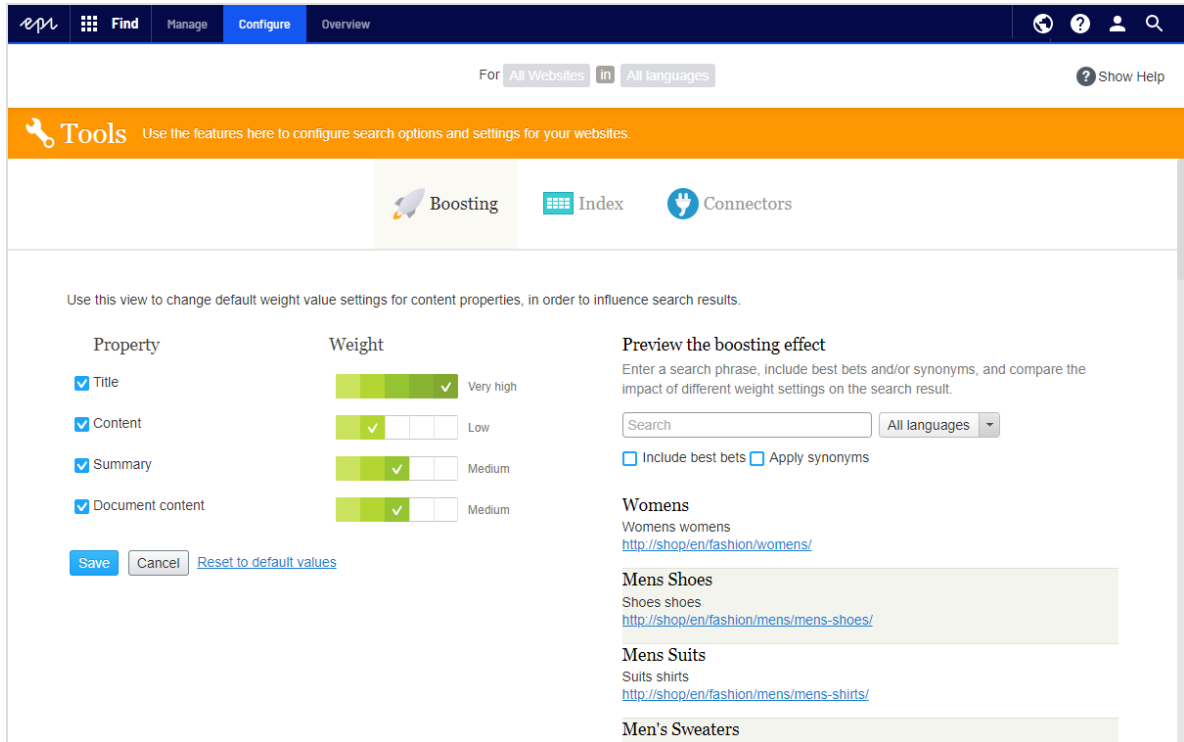


## Boosting results through properties

**Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

Episerver Search & Navigation has default properties, such as **Title**, **Summary**, and **Content**, that are automatically mapped to corresponding content properties. Each property has a weight setting that affects search result rankings. You can adjust the weight settings, which is called *boosting*.

Boost weight settings if your site has specific and well-defined content types. For example, if your site hosts scientific articles whose summaries are generally well-written and of great importance, increase the **Summary** weight so it has a greater impact on search rank.



## Changing weight settings

- From edit view, select **Find > Configure > Boosting**. Default properties appear on the left of the screen.
  - Title.** Content title. For CMS content, it is typically the **Name** if not specified by the developer. For crawled content, it is the `<title>`-tag. For custom types, title is by default the **SearchTitle** property, if not specified by the developer.
  - Content.** Web page content.
  - Summary.** The introduction, summary, abstract, or similar property type.
  - Document content.** The content of an asset, such as a PDF or Word document.
- In the **Weight** column, click a box to change a property's weight.
- Click **Save**.

### Notes about changing weight settings

- To test the impact of property weight changes, click **Preview the boosting effect** from the right side of the Boosting screen.

- To revert the changes, click **Reset to default values** from the Boosting screen, under the list of properties.
- These settings affect search results for *all* content types and all languages on all websites in your implementation.



## Clearing the index and reindexing

**Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

You can clear (that is, remove) the Episerver Search & Navigation index and statistics. You typically do so during website development, after making extensive changes to content properties, or when reorganizing or removing content. You might also clear statistics after testing new functionality.

**Tip:** After you clear the index, re-index the website.

The screenshot shows the Episerver Tools interface. At the top, there are filters for 'All Websites' and 'All languages', and a 'Show Help' button. Below this is an orange header with the 'Tools' logo and the text 'Use the features here to configure search options and settings for your websites.' The main navigation bar includes 'Boosting', 'Index' (which is highlighted), and 'Connectors'. The main content area contains a warning message: 'Use this view to clear the content index and/or statistics for the website. This may be needed when extensive changes have been done to content structures and properties.' Below this are two panels. The left panel, 'Clear content index', explains that clearing the index will empty it completely and requires re-indexing. It features icons for a folder, document, and list, and a 'Clear index' button. The right panel, 'Clear statistics', explains that clearing statistics will remove all data. It features a line graph with green peaks and a 'Clear statistics' button, which is being clicked by a mouse cursor.

## Clearing the index

When clearing the index, you remove all content from it, and have an option to clear statistics also.

**Warning:** Index clearing operations are permanent. You cannot reverse them.

1. From edit view, select **Find > Configure > Index**.
2. Click **Clear index**.
3. Re-index the website. See [Re-indexing the website](#).

## Re-indexing the website

1. Log into CMS admin view.
2. Go to **Scheduled Jobs**.



### 3. Select the **Episerver Search & Navigation Content Indexing** job.

You can start the job manually or on a schedule. See also: [Scheduled jobs in the CMS Administrator User Guide](#).

Re-index your site under any of the following conditions:

- After you clear the index, because it is empty.
- If automatic indexing failed, or content must be reindexed for another reason.
- You changed content access rights, because automatic indexing does not detect those changes.

## Removing statistics

1. From edit view, select **Find > Configure > Index**.
2. Click **Clear statistics**.

If you clear statistics, [statistics view](#) is empty until new statistics are collected.



## Adding connectors

**Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

A search connector lets Episerver Search & Navigation search content outside your website, such as an external blog related to your website. The connector lets your site visitors find the blog posts among your site's search results.

While Episerver Search & Navigation pushes internal content to the search engine instantly, a connector crawls external websites on a specified schedule.

Add connectors to your website, helping visitors to find content that is related to but not actually on your website.

Name

Type

Start URL

Exclude media types

[Advanced fine tuning of indexing \(click to display\)](#)

Schedule  No  
 Every day at  at   
 Every  at   
 Local time is displayed. Note that you need to manually adjust the scheduling for daylight saving time.

Name	Type	Schedule	Status	Last indexed	Documents
Support Help Center	Crawler	Every Monday at 10:00 PM	Indexed	Sep 27, 10:06 PM	947 <input type="button" value="Start"/>

## Configuring connectors

To access the Connectors screen, from the top menu, select **Find > Configure > Connectors**. To view on-screen help, click **Show Help** in the top right corner. The following points supplement the on-screen help.

- By default, two connector types are available: **Crawler** and **RSS/Atom**. The connector type determines which configuration options appear below the **Type** drop-down list.
- If you choose **Crawler** type, you can fine-tune indexing by excluding media types such as style sheets, JavaScript, and XML files. See also: [Media Types](#). Episerver Search & Navigation excludes the following media types from indexing by default.
  - text/css
  - text/ecmascript
  - text/javascript
  - application/ecmascript

- application/javascript
- application/x-javascript
- application/x-pointplus








Click **Advanced fine tuning of indexing** to further limit indexing.

- Exclude query strings that are part of a link. For example, exclude crawling campaign tracking parameters (such as `utm_source`, used by Google Campaigns) to avoid unintentionally updating a campaign counter.
  - Specify parts of a website to crawl but not index, or to not crawl at all. You may want to crawl but not index search *links* to other pages, but not the content on those pages.
- Specifying an indexing interval.
    - Although you set a schedule in local time, it is converted to coordinated universal time (UTC) so it occurs at the same time regardless of server location. However, you must manually adjust local time when needed, such as for daylight savings time.

## Viewing connectors and indexing jobs

The connectors list (at the bottom of the screen) shows status and scheduling information for all indexing jobs.

- You can manually refresh a connector's indexing status. If completed, last completion time appears.
- You can edit or delete any connector from its context menu. For example, you can update its schedule.
- You can manually start and stop indexing jobs.

Name	Type	Schedule	 Status	Last indexed	Documents	 Start/stop job	 Context menu
Article base	Crawler	No	<span style="background-color: #90EE90;">Indexed</span>	Jun 29, 5:13 PM	0	 Start	
EPiServer Knowledge Base	Crawler	Every Monday at 1:00 PM	Indexing		9	 Stop	 <ul style="list-style-type: none"> <li>Edit</li> <li>Delete</li> </ul>
EPiServer Blogs	RSS/Atom	No				 Start	

## Updating a crawler's start URL

If you edit a connector's **start URL**, the crawl removes from the index all items that were previously indexed under the old URL.



## Exploring the index

**Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

Most Episerver Search & Navigation features are built on the search index, which stores and provides quick access to data collected by the search engine. Without an index, the search would be much slower because each query would have to search through all site data.

Episerver Search & Navigation pushes content to the search index as it is published, so updates occur in near real time. Depending on how the index is set up, it can contain information about all types of content, including various file types and community comments.

To view your search index, from edit view, select **Find > Overview**.

## Reviewing the index overview screen

The index overview summarizes your search index at the current time. If your environment hosts multiple websites, the index is shared among them, and you can explore each site's index.

- The **Index** section displays the index name and .NET API version number.
- The **Document Types** section displays the total number of indexed objects, and the number of objects of each type. While most objects are page types, Episerver Search & Navigation also indexes other website objects.
- The **CMS Content** section summarizes each site's indexed content. The screen displays the total number of indexed objects for the entire structure and for each site. You can also see the distribution per page type and languages for each site.

**Note:** A language version of a page is treated as a separate object in the index.

## Reviewing the Explore screen

The Explore screen displays index details, such as when a page was last indexed. Episerver Search & Navigation lists the total indexed content, and you can filter by content type. You can also search for indexed content using query syntax.

Click an item to see its details. For example, you can view when an object was indexed, its IDs, and the indexed content, which is useful when you set up and fine tune the index.

For All Websites in All languages ? Sho

**Explore** View your index to see what has been indexed and when, and analyze the index details for a specific object.

Q Filter 248 results

Name	Type
> Top Collaboration Technology	ArticlePage
> Trek Selects Alloy Plan	ArticlePage
> Todd Slayton	ContactPage
▼ Management	StandardPage

```
{
  "SearchSubsection$string": "Start",
  "GetTimestamp$date": "2015-06-29T15:57:57.1320167Z",
  "IsPendingPublish$bool": false,
  "ContentLink": {
    "IsExternalProvider$bool": false,
    "WorkID$number": 0,
    "ID$number": 35,
    "$type": "EPiServer.Find.Cms.IndexableContentReference, EPiServer.F
ind.Cms",
    "__types": [
```

**Filter by Type**

StandardPage	42
ImageFile	41
ContentAssetFolder	36
ContentFolder	22
PageListBlock	16
FormBlock	15
ContactPage	10
ArticlePage	10
TeaserBlock	10
ContainerPage	8
ProductPage	7
LandingPage	6
NewsPage	4
JumbotronBlock	4
EditorialBlock	4



## Access rights

**Note:** This topic is intended for administrators and developers with administration access rights in Episerver.

Episerver Search & Navigation's access rights feature lets site administrators control which users can access components of the Episerver platform.

To access Episerver Search & Navigation features, a user must be a member of one of these groups:

- **Administrators**, **WebAdmins**, and **SearchAdmins** can access the Episerver edit view, Episerver Search & Navigation search features, and access to the [Clear Indexes screen](#).
- **SearchEditors** can access the Episerver edit view and the Episerver Search & Navigation search features. They cannot access the Clear Indexes screen.

Because most users are not members of Administrators or WebAdmins, they must have membership in *both* SearchAdmins and SearchEditors to access Episerver Search & Navigation features in admin view.

**Note:** The membership and role providers available for your website need to be configured to use the built-in groups and roles in Episerver. This is typically done during site setup.

See [Managing permissions](#) for information about managing access rights for other parts of the Episerver platform.



## Using Personalized Search & Navigation

Every site visitor is different, and looking for different things on your website. Moreover, user behavior changes from one day to the next.

Personalized Search & Navigation customizes a site visitor's search results and landing pages by considering the visitor's activity and your business rules. When you use Personalized Search & Navigation with Episerver Commerce, relevancy is unique to each visitor so should increase conversions on your website. For example, a teenage soccer fan looking for team apparel gets different results from a new mother looking for baby items, even though both search for "shoes".

### Benefits of Personalized Search & Navigation

- **Increased sales.** Optimizing the search experience has been shown to increase revenue.
- **Better engagement.** Improved experience encourages customers to keep shopping.
- **Better conversion rates.** Easier for customers to find products they are looking for.
- **Better retention.** Positive experiences encourage customers to return to your site.

### Personalized Search & Navigation: Part of a personalization strategy

Many Episerver products enable you to personalize the site visitor experience. For example, you can personalize related merchandise, and offer discounts based on a site visitor's history. This topic only covers Personalized Search & Navigation. To learn about other personalization features, see [Personalization](#).

## How Personalized Search & Navigation works

Personalized Search & Navigation tracks the following visitor information for the current session.

- traffic source
- search query
- categories visited
- selected facets: color, size, brand
- use of ratings and reviews

Personalized Search & Navigation analyzes that information along with knowledge from previous interactions (preferences, purchases) in order to boost search results and landing pages so that the most relevant items *for that individual* appear at the top.

**Note:** Personalized Search & Navigation cannot affect external search results.

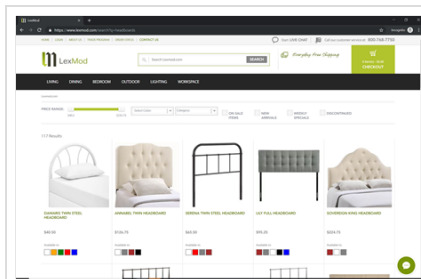
## Other factors affecting search results

Ranking and weighting of search results can also consider a merchandiser's business rules or strategies. So, best-selling items, high conversion rates, most revenue, or most units sold can also be used to affect search results. The result is an optimal ordering of search results for every user.

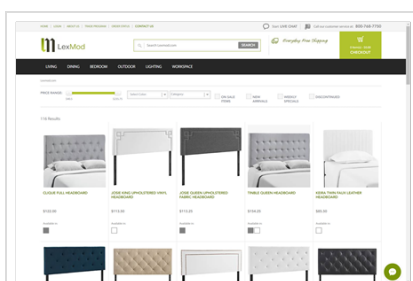
## Example of search results before and after personalization is applied

Default content displayed to "unknown" visitor





Content displayed after visitor clicked "bed headboards"




## Another Personalized Search & Navigation Example

Notice how the boosting attributes moved the Faded Glory shoes to the top of the search results.

Home Mens Womens Find page **Find Personalization**

shoe

Your search for **shoe** resulted in the following hits:

With personalization	Score	Brand	Available colors
<b>Product</b> Faded Glory Mens Canvas Twin Gore Slip-On Shoe 	0.946934	Faded Glory	Grey
Lei Womens Casual Oxford Shoe	0.91813004	lei	Black
Classic Mid-Heeled Pump Dress Shoe	0.8881521	Generic	Black
Pierina Ballet Flats Blue Floral	0.38711762	Alpine Swiss	Blue
Puma Green Suede Athletic Sneakers Shoes	0.3842968	Puma	Green

Without personalization	Score	Brand	Available colors
Lei Womens Casual Oxford Shoe	0.91813004	lei	Black
Classic Mid-Heeled Pump Dress Shoe	0.8881521	Generic	Black
Faded Glory Mens Canvas Twin Gore Slip-On Shoe	0.8869979	Faded Glory	Grey
Pierina Ballet Flats Blue Floral	0.38711762	Alpine Swiss	Blue
Puma Green Suede Athletic Sneakers Shoes	0.33872792	Puma	Green

Attributes increasing boosting includes product pages previously visited by brand

Current attributes from peerius:		
Attribute name	Attribute value	Boost factor
brand	puma	1.13452949173479
brand	beston	1.06757187388131
brand	faded glory	1.06757187388131

## Enabling Personalized Search & Navigation

To add Personalized Search & Navigation, a developer needs to install and configure the personalization service on your website. The developer must also customize search queries so that the factors described above can boost results. For more information, see [Personalized Search & Navigation](#).

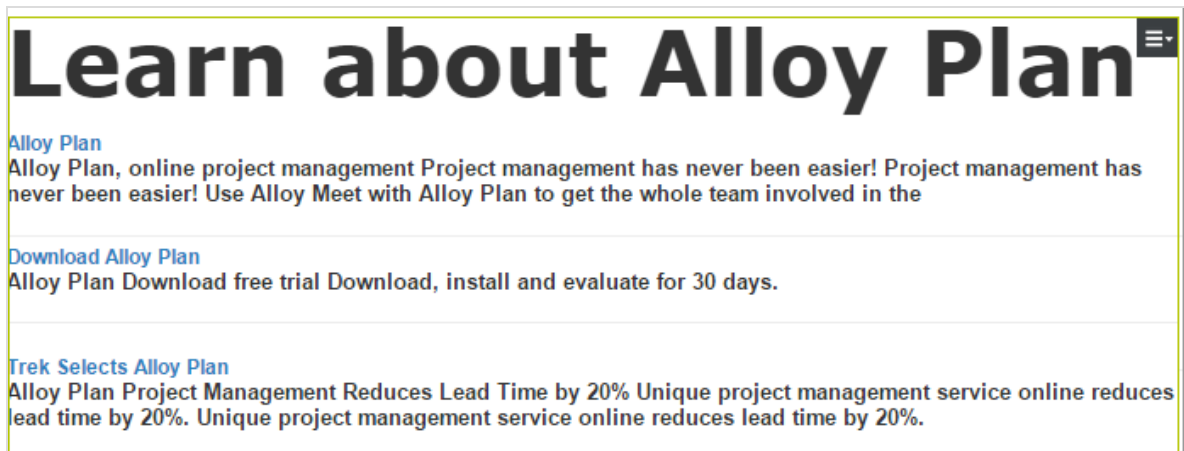


## Customized search block

**Note:** You have access to the customized search block functionality if an administrator enabled the feature.

A customized search block displays content from your website based on your search criteria. For example, you want to display content found using the search term *alloy plan*.

You can modify a block's appearance by including a heading, descriptions, and setting the number of results. When you place a customized search block on a page, the results of your criteria appear, as shown in the following image.



To create a customized search block, use the following steps after the block is created. You can edit it from the On-page editing view (basic settings only) or the All Properties editing view (all settings).

1. Create a block, as explained in *Blocks*, using the Customized Search block type.
2. Under **Required Properties**, enter the **Search phrase**. You must enter at least one character. This phrase reappears on the block's properties screen, from where it can be edited.
3. Click **Create**. The display options screen appears.
4. Access the All Properties editing view.
5. Under the **Content** tab, enter search criteria. Only **Search phrase** is required. Use the remaining fields to filter the search and control the display of results. The block displays content that satisfies *all* criteria.

- **Search heading.** If you want a heading to appear above search results, enter its text.
- **Basic Search settings**
  - **Search phrase.** Enter text for which you want to search content. You must enter at least one character.
  - **Match all words.** Select to require the search to include *all* text; clear to search for any word in the search phrase.
  - **Number of hits.** Enter the number (1-1000) of search results that appear in the block.
  - **Include description.** Select to display the description of each search result.
- **Advanced search settings**
  - **Search root.** By default, all content is searched. To filter the search, select a content root; only content within and under the root is searched. For example, you want to search only content in the `/campaigns` folder, or its child folders.
  - **Content types.** By default, all content types are searched. To filter the search, select content types to include. For example, you want to only search pages whose type is *Landing Page*.
  - **Include Best Bets. Use synonyms.** If desired, use the Best Bets and Synonyms features to enhance the search results. See [Promoting content using best bets](#) and [Adding synonyms for similar phrases](#).

## Example: Real Madrid press releases

Your website provides news about the *Union of European Football Associations* (UEFA). You want to display the five most recent press releases about *Real Madrid*. So, you

1. Create a customized search block.
2. Use **Real Madrid** as the **Search phrase**.
3. Assume your site has a page tree node **News**, whose content uses two page types: **News** for ordinary news, and **Press releases**.
  - a. Use the **Search root** field to select the **News** page tree node.
  - b. Use the **Content types** field to select the **Press release** page type.
4. Set **Number of hits** to **5**.
5. Place the block in appropriate location(s) on your site.

## Additional resources

- [Customized search block styling guide](#) *(for developers)*
- [Customized Search Block in Episerver Find](#) *(for developers)*

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# Episerver Customer-Centric Digital Experience Platform (DXP)<sup>™</sup>

The Episerver Customer-Centric Digital Experience Platform (DXP)<sup>™</sup> unifies digital content, commerce and marketing in one platform, including omnichannel solutions for intelligent campaigns. The platform uses artificial intelligence and behavioral analytics to deliver personalized experiences everywhere. With our secure, reliable platform you can quickly increase engagement, revenue and productivity, while getting the fastest time to value.

## About Episerver

At Episerver, we believe digital transformation is a journey. We have been guiding customers for more than 20 years in providing standout digital experiences. Today our network of 880 partners, in 30 countries, supports 8,000 customers and over 30,000 websites. Founded in 1994, Episerver has offices in the US, UK, Sweden, Australia, Germany, Denmark, Finland, Norway, Poland, the Netherlands, Spain, South Africa, Singapore, Vietnam and the UAE.

For more information, visit [episerver.com](https://www.episerver.com).



[www.episerver.com](https://www.episerver.com)