



Optimizely Search & Navigation

User Guide



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Optimizely Search & Navigation User Guide

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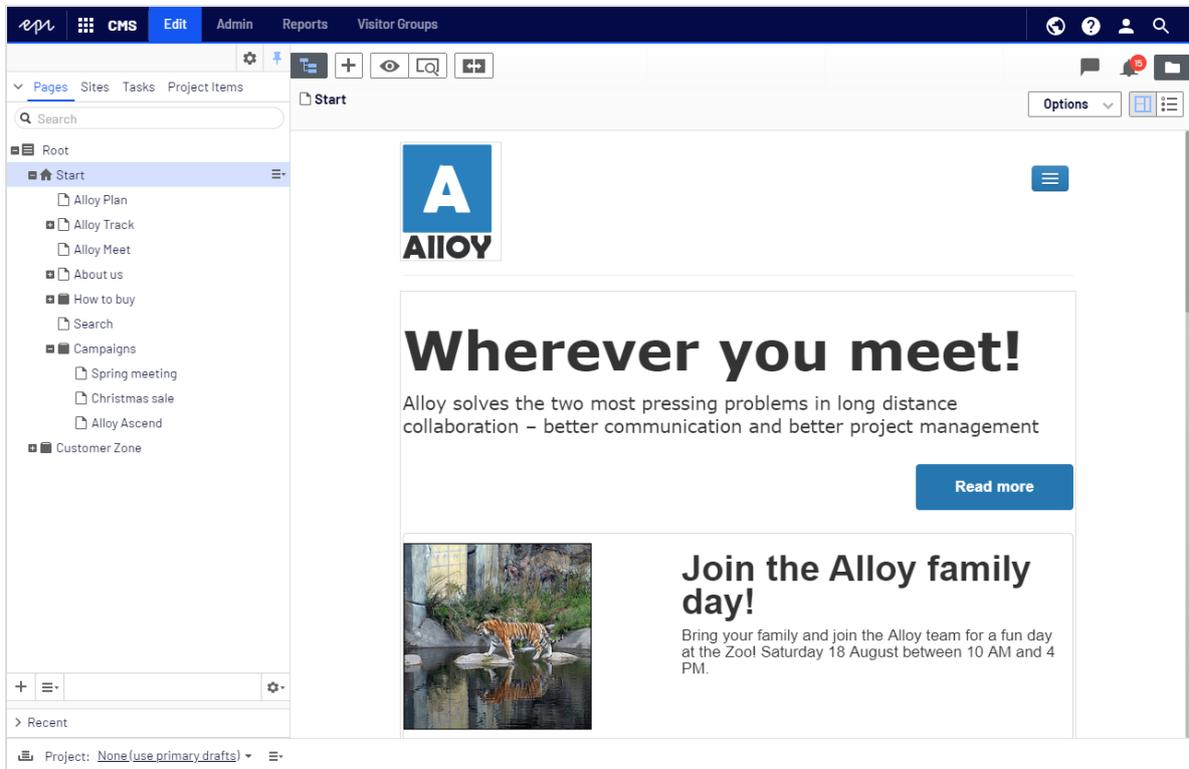
Introduction

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

You access the online help from within the Optimizely platform or from [Optimizely 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 Optimizely Optimizely Search & Navigation, which you can find on [Optimizely World](#). Developer guides and technical documentation also are found on [Optimizely 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 Optimizely platform.



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



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



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



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



Optimizely 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 Optimizely 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 Optimizely 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 Optimizely user guide uses images and screenshots to visually guide you through the features of the Optimizely 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.

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What's new?

This user guide describes functionality available in the latest release of a standard implementation of the Optimizely platform software and services. New features are continuously made available. See [Optimizely 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 Optimizely implementation.

This release of the Optimizely User Guide describes features available in Optimizely as of 2022-03-14. 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 2022

Released	Area	Features and updates
2021-10-21	Campaign	You can now create webhooks for the <i>spam complaint</i> event.
2021-10-15	Campaign	The new topic, Setting up the List-Help header, has been added.
2021-09-30	Campaign	As part of the rebranding, the images and attachments feature was redesigned. It is now complete and includes the option to delete created images and attachments. (update 379) When creating or editing users, you can now specify allowed IP addresses and IP ranges

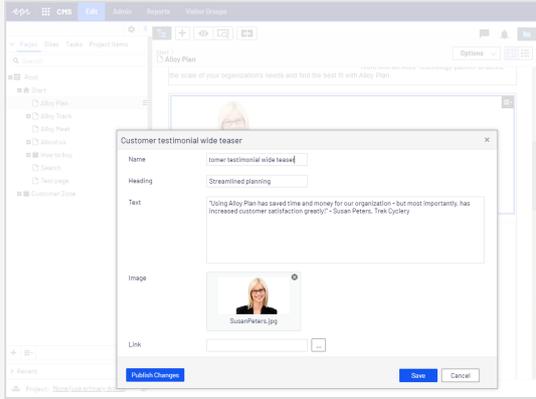
Released	Area	Features and updates
		to restrict access to the user account. See Managing users. (update 379)
2021-09-28	CMS	The Reports view is no longer supported and is removed. (update 378)
2021-09-28	CMS	The admin view is redesigned. (update 378)
2021-09-28	CMS	Visitor groups user interface is redesigned. Criteria previously included in the add-on Visitor Group Criteria Pack are now included in Optimizely CMS by default, see Built-in visitor group criteria. (update 378)
2021-09-28	CMS	The dashboard is no longer supported and is removed. Gadgets are now only installed in the navigation or assets panes. (update 378)
2021-09-28	Commerce	The Commerce Manager administration system is removed, and replaced with a new Administration view, from where you can define markets and warehouses, index catalogs, configure taxes, shipping, and payments, and work with dictionary properties. (update 378)
2021-09-28	Commerce	A new Customers view replaces the legacy Customer Management in Commerce Manager. (update 378)
2021-09-28	Commerce	Some functionality, previously managed from Commerce Manager, is now managed through code: <ul style="list-style-type: none"> • Dictionaries. Adding currencies, countries, and return reasons. • Dictionaries. Adding values for organizations and contacts.

Released	Area	Features and updates
		<ul style="list-style-type: none"> Catalog batch updates and catalog import/export. Management of business objects, and catalog and meta-classes fields. <p>See Optimizely World for technical details, and previous versions of the user guide for the removed legacy functionality. (update 378)</p>
2021-09-23	Campaign	<p>Mailings Classic and Reports will be deactivated on 2022-03-01. To migrate your mailings to Smart Campaigns, see Mailings Classic. To migrate your reports to the Performance Dashboard and Deep Analytics, see Reports. (update 377)</p> <p>The current Apple operating system versions include the Apple Mail Privacy Protection, which restricts the transmission of tracking information to Optimizely Campaign. See Apple Mail Privacy Protection.</p>
2021-09-09	Campaign	<p>You can now merge mailing content from different campaigns into a new campaign. See Merge content. (update 377)</p>
2021-09-02	Campaign	<p>When importing recipients, you can now merge the contents of recipient list fields of type "String" and "Text". You can either append or prepend the content or replace the old content with the new one. (update 376)</p>
2021-08-12	Marketing automation connectors	<p>The configuration settings screen of the Microsoft Dynamics CRM connector was updated.</p>
2021-08-02	Campaign	<p>The redesigned user interface has been released. Optimizely Campaign screenshots in the user guide have been updated. See Start</p>

Released	Area	Features and updates
		page.
2021-07-22	Marketing automation connectors	The Pardot connector has a breaking change when you upgrade to version 6. The configuration screen has new fields to create new connectors. Configurations made with older versions of the Pardot connector will no longer work.
2021-07-20	Campaign	You can now create webhooks for the <i>unsubscribe</i> event. (update 373)
2021-07-13	Email Product Recommendations	New strategy: Recommendations from categories of purchased products (last 365 days)
2021-06-24	Campaign	If you use the coupon system, you can now optionally create QR codes. You can also use field functions to generate QR codes that refer to specific recipient list fields. (update 371)
2021-06-17	Campaign	See Deliverability basics for information about the BIMl email authentication standard.
2021-06-14	B2B Commerce	Spire roles documented.
2021-06-09	B2B Commerce	Adyen payment gateway plug-in documented.
2021-05-27	Marketing automation connectors	Fields were added to the Acoustic (Silverpop) Connector setting screen to include database lists. (update 368)
2021-05-13	Campaign	In Deep Analytics, you can use separate groupings for the name and ID of mailings, recipient lists, and clients. See Groupings. (update 366)
2021-04-29	Triggered Messages	A new feature was added to the Targeted Discount daily trigger to enable the trigger to fire if products were added to a basket but not pur-

Released	Area	Features and updates
		chased within the last 30 days.
2021-04-22	Campaign	<p>You can now create webhooks for the <i>bounce</i> event. (update 364)</p> <p>See Deliverability basics for information about list bombing and learn how to recognize these cyberattacks and protect yourself.</p>
2021-04-15	Campaign	See Deliverability basics for a glossary of the most important terms related to deliverability.
2021-03-31	Campaign	<p>The beta phase of the webhook feature has been expired. You can now create webhooks for the <i>sent</i> event and optionally submit the Basic HTTP Authentication header. You can also verify and update webhooks via REST API. See Webhooks. (update 362)</p> <p>You can now display background images in grouping paragraphs and sidebars in the mobile newsletter version. You can also automatically stretch or crop the image to fill the entire paragraph area. See Grouping paragraph. (update 362)</p> <p>The beta phase of the A/B tests for transactional mails feature has been expired. This feature is now available for all users on request.</p>
2021-03-25	Visitor Intelligence	Visitor Intelligence now comes with a set of built-in filter definitions. It is also possible to add time and occurrence filters to segments to further limit matching profiles. See Creating a segment based on filter definition. (update 360)
2021-03-25	Campaign	In the Optimizely Campaign start menu under Scheduled jobs, you can find an overview of

Released	Area	Features and updates
		<p>the scheduled jobs configured in your client. (update 360)</p> <p>If you use the coupon system, you can generate bar codes based on the values of your recipient list fields via field functions.</p>
2021-02-18	Campaign	<p>In the Marketing Automation's Advanced node, you can specify which recipients are passing through the Marketing Automation campaign at which time. You can now define even more precisely when Optimizely Campaign should check the criteria. For example, if you set the interval to <i>Every 2 months, each 1st from 14:00</i>, Optimizely Campaign checks the criteria on the first day of every second month at 14:00. (update 355)</p>
2021-02-04	Campaign	<p>If you use the recipient list management, you can now change the field name of recipient list fields. See Editing recipient list fields. (update 352)</p>
2021-01-21	B2B Commerce	<p>The end user documentation for B2B Commerce and Optimizely PIM has now been integrated in this user guide. See sections Optimizely B2B Commerce and Optimizely PIM.</p>
2021-01-21	CMS	<p>Edit and publish blocks in a quick edit view, which lets you edit relevant block properties without leaving the current context. (update 350)</p>

Released	Area	Features and updates
		
2021-01-21	Commerce	<p>Customer service representatives can create <i>notes</i> associated with carts, orders, and subscriptions (update 349).</p>
2021-01-21	Personalization	<ul style="list-style-type: none"> • Create reusable email templates • Export CSV data in localized format for the selected language • Users (with authorization) can change the currency selection
2021-01-21	Campaign	<p>You can now run A/B tests for transactional mails to send different variants of a transactional mail and check which variant performs better.</p>

Archived documentation

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

Optimizely Search & Navigation

Note: The [Optimizely 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 [Optimizely 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. Optimizely Search & Navigation 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."

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

The screenshot shows the Alloy website's search interface. 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 for 'Start', 'Alloy Plan', 'Alloy Track', 'Alloy Meet', 'About us', and 'Find'. Below the navigation is a search bar containing the text '"alloy meet"' and a 'Search' button. The search results section is titled 'Search result' and indicates that the search for '"alloy meet"' resulted in 2 hits. The first result is 'Download Alloy Meet', with a sub-section 'Installing' that says 'You are installing Alloy Meet.' On the right side of the search results is a 'Sections' sidebar with a list of categories and their 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)' item is highlighted with a blue background.

Feature summary

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

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

Features in "standard" Optimizely 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 Optimizely Search & Navigation Connections Edition

Optimizely 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 Optimizely 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 Optimizely user interface.

Help in Optimizely Search & Navigation

Optimizely 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.



Optimizely Search & Navigation lets you develop customized functionality to create automatic landing pages and different types of adaptive navigation with minimal effort. While Optimizely 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 Optimizely Search & Navigation's automatic SEO is based on queries made by site visitors. As the number of queries grows, Optimizely 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

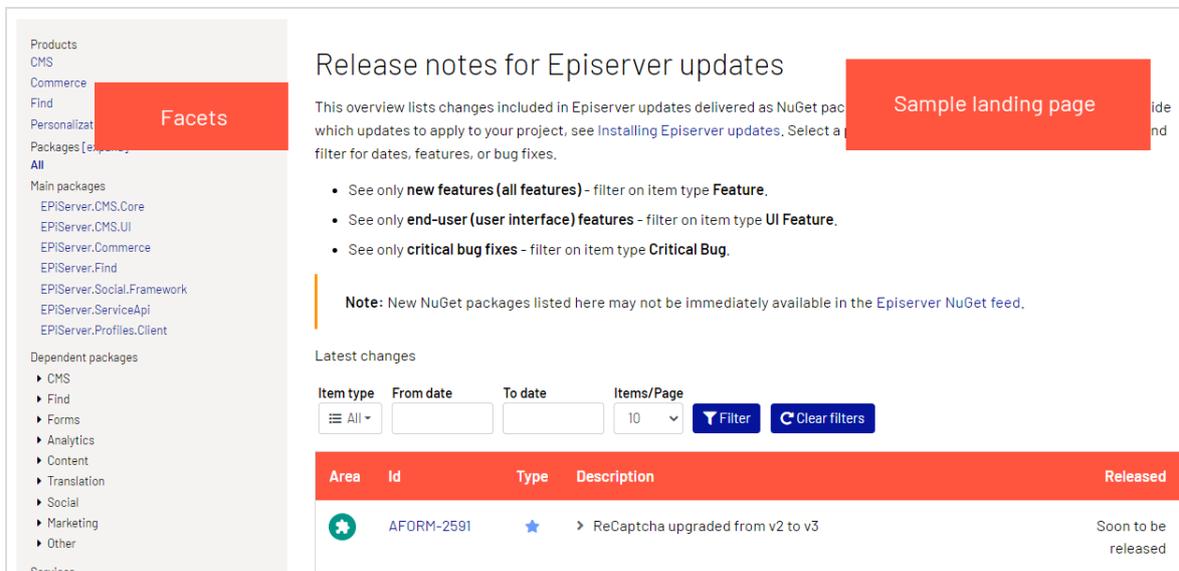
As your website matures and accumulates search data, use search statistics to analyze search activity. Optimization evolves into monitoring, fine tuning, and promoting content to deliver the right content to visitors.

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.



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

Using Optimizely 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

Optimizely 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 Optimizely 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 to 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 as described in this topic 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.

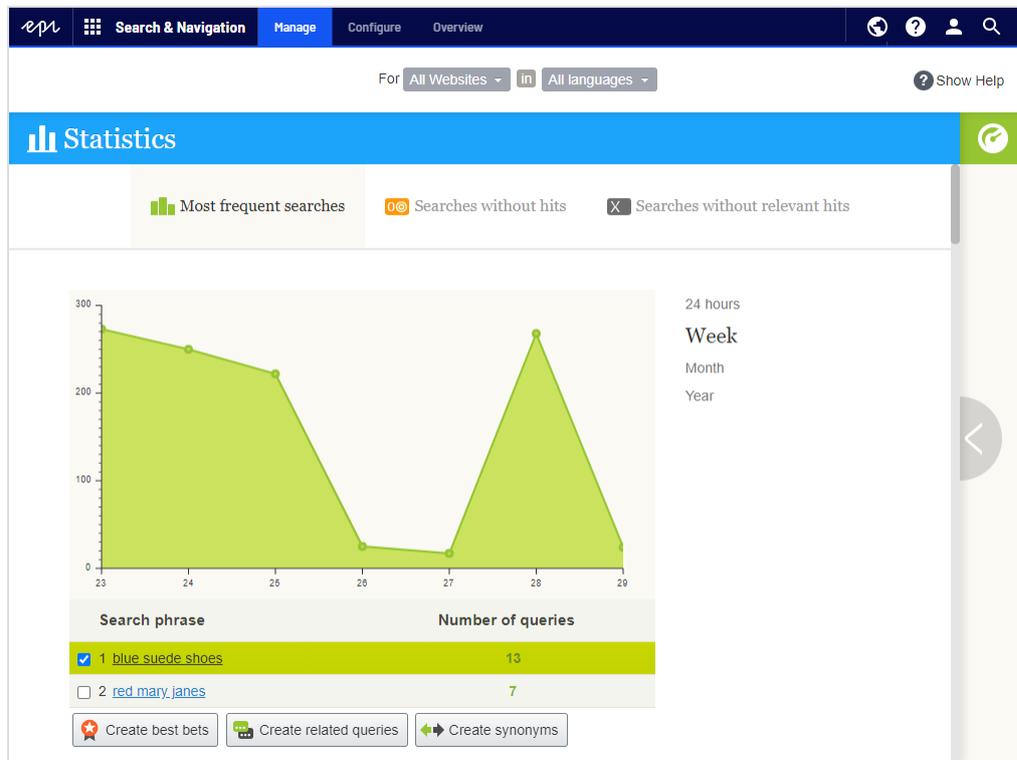
See also general guidelines about optimizing content for search engines, such as Google's [Search Engine Optimization Starter Guide](#).

Analyzing search statistics

Optimizely 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 Optimizely 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](#), [auto completes](#) 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 is titled "0 most clicked search results matching 'plan'" and contains a table with two columns: "Search result" and "Clicks". The table body contains the text "No matching hits." The right section is titled "People who searched for 'plan' also searched for..." and contains a table with two columns: "Search phrase" and "Number of searches". This table lists two 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.

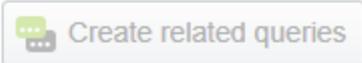
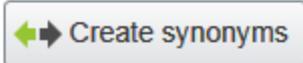
Search result	Clicks
No matching hits.	

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

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

Manually optimizing search results

Although Optimizely 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 Optimizely Search & Navigation features.

The optimization view

To access Optimization View, from the toolbar, click **Search & Navigation > Manage > Optimization**.

The screenshot shows the 'Optimization' view in Optimizely. The top navigation bar includes 'For All Websites' and 'All languages'. The left sidebar has 'Statistics' and 'Optimization' tabs. The 'Optimization' tab is active, displaying a form to create 'Best Bets'. The form includes a 'Phrases' field, a 'Target content' section with radio buttons for 'Local' and 'External link', a 'Title' field, and a 'Description' field. Below the form are radio buttons for 'Display best bet in its own style' (selected) and 'Display best bet like search result'. At the bottom, there is a 'Best Bets' list with a search bar and 'Edit'/'Delete' buttons for each entry.

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.

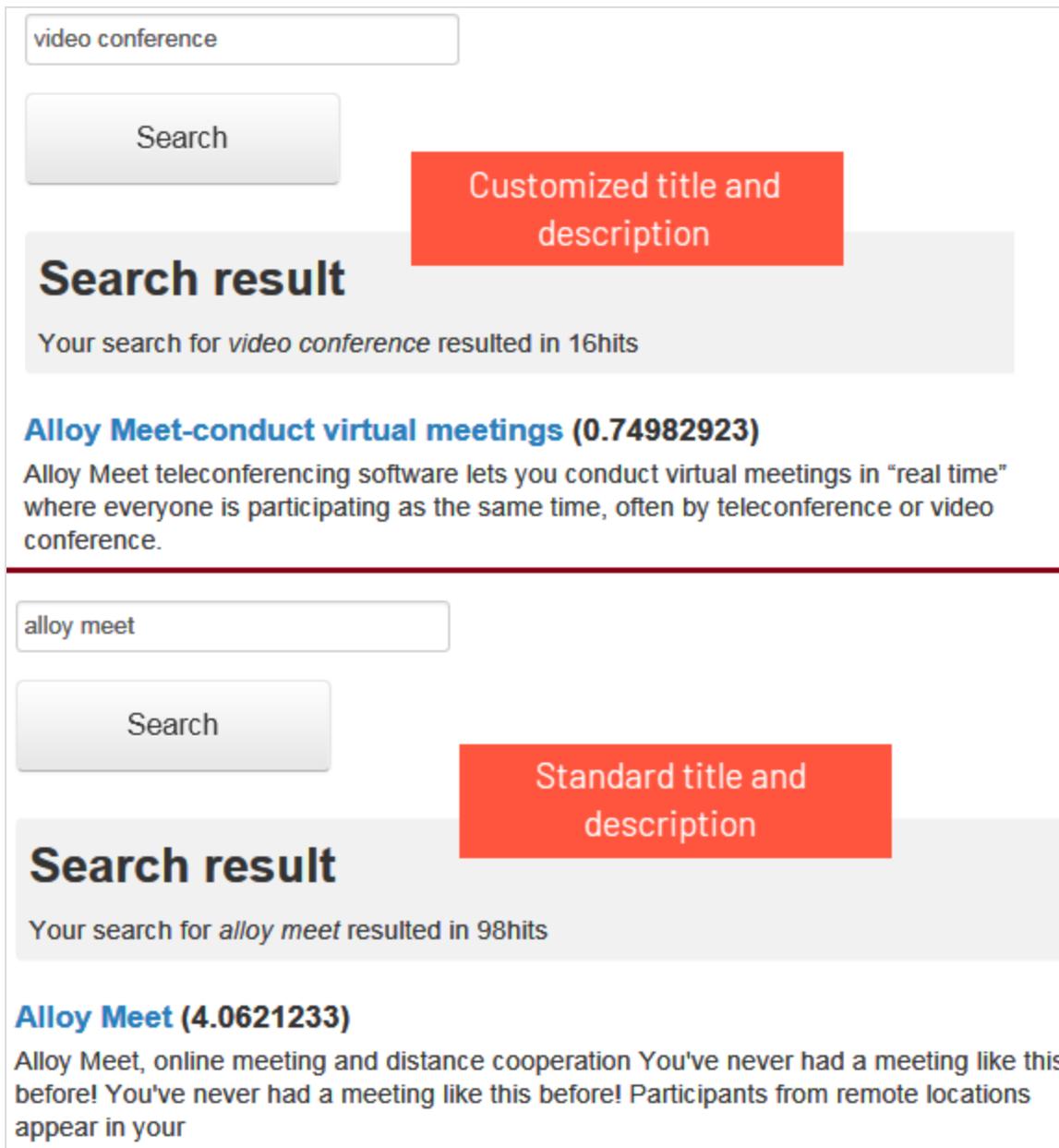
- [Promote content using best bets](#)
- [Suggest related search phrases](#)
- [Add synonyms for similar phrases](#)
- [Create editorial autocomplete suggestions](#)

Promoting content using best bets

Optimizely 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.



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 **Search & Navigation > 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.

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

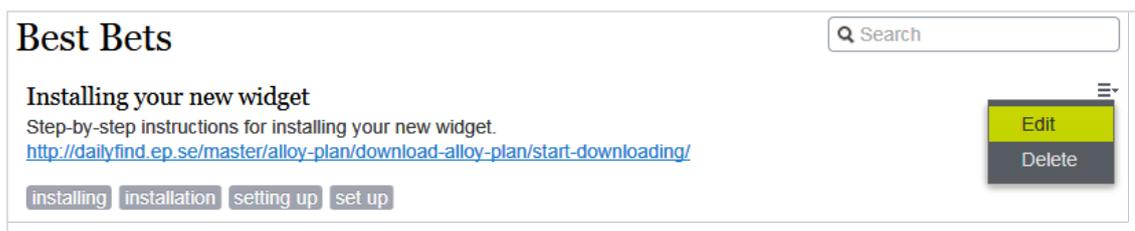
result.

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

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/>

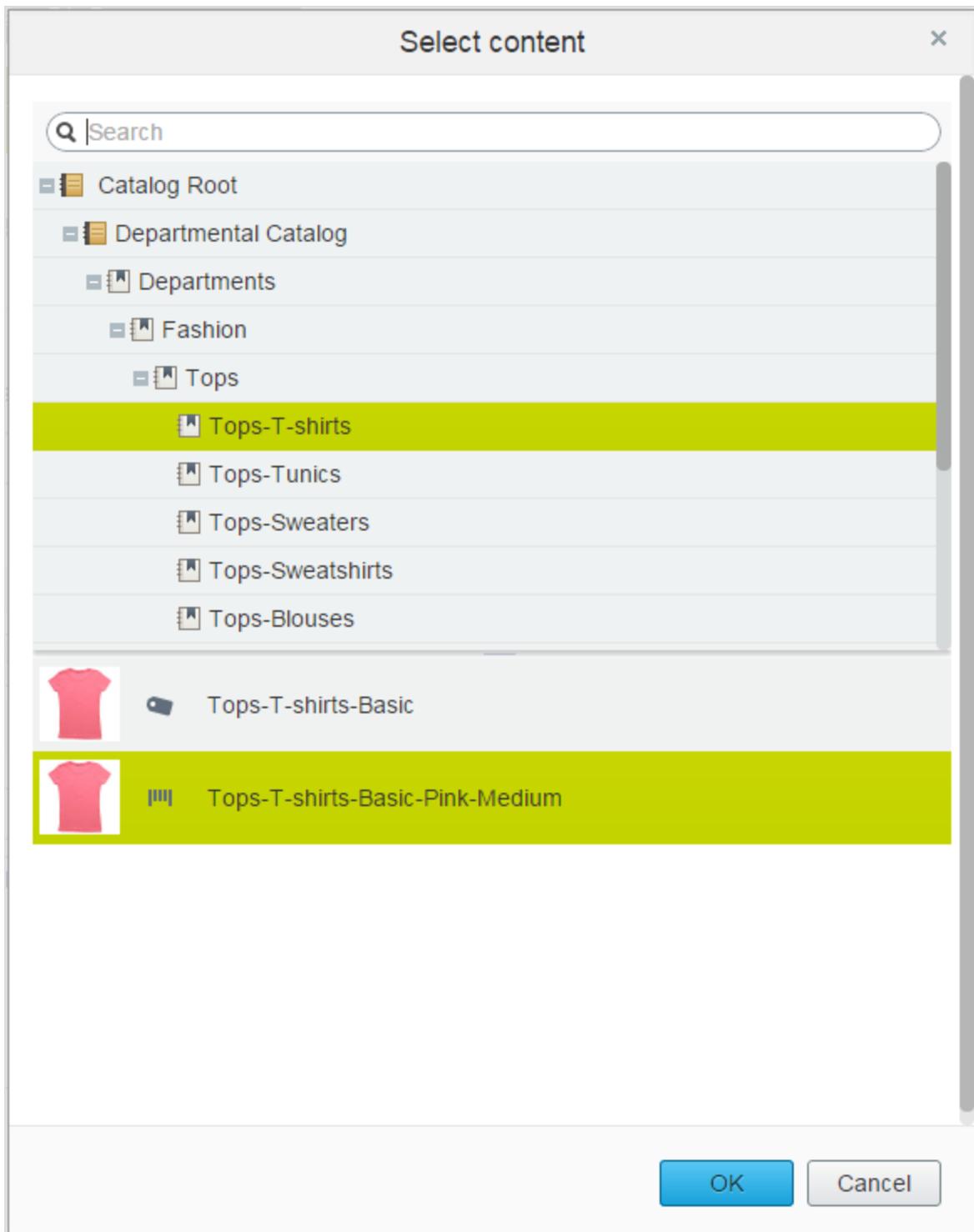
Content is scheduled for publishing

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 Optimizely 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.



The screenshot shows a search interface with the following elements:

- Header: "Start / Find"
- Search input field: "black bear"
- Search button: "Search"
- Search result section: "Search result"
- Search result text: "Your search for *black bear* resulted in 8hits"
- Related queries: "People also searched for: polar bear brown bear bear" (highlighted with a red box)

Optimizely 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 **Search & Navigation > 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
	hickory
	osage
	ash
	cedar
	black locust

Edit

Move Up

Move Down

Delete Phrase

Delete Suggestion

3. 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.
4. Click **Add related query**.
5. 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	
	bear	
bow woods	babboo	
	hickory	
	osage	

☰

Edit

Move Up

Move Down

Delete Suggestion

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, Optimizely 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, Optimizely 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.

Phrases		Synonym
adorable, lovely, nice	 Bidirectional	beautiful
amount, bill, charge, co payment, price	 Unidirectional	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 Optimizely 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.

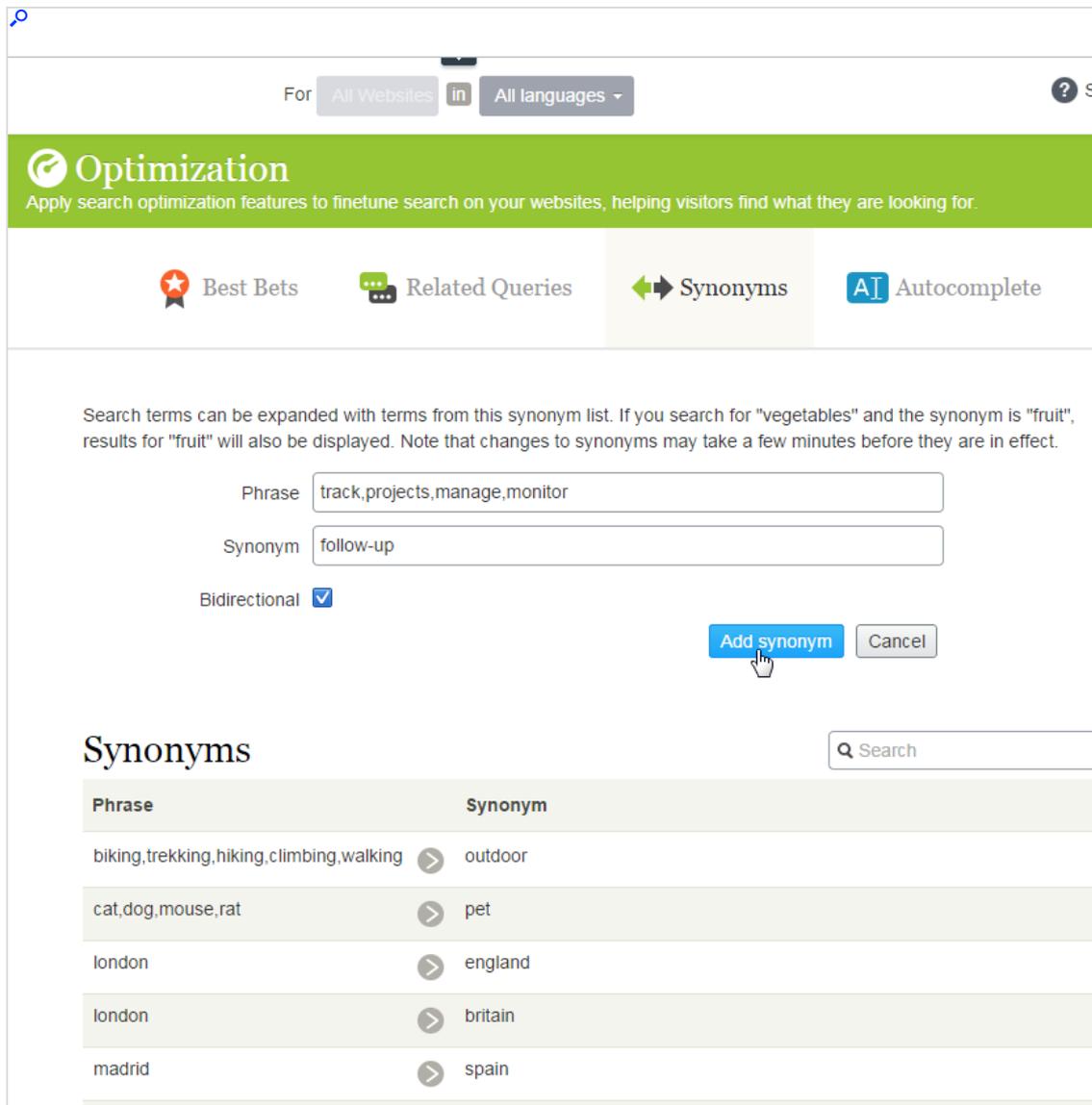
Synonyms apply to all site content, or content in the selected language, but are only used if someone uses the Optimizely Search & Navigation search functionality on your site.

Adding synonyms

Note: Synonyms are usually language-specific but you can apply them [to all languages](#). Synonym matching is not case sensitive.

1. From edit view, select **Search & Navigation > 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**.



- 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.

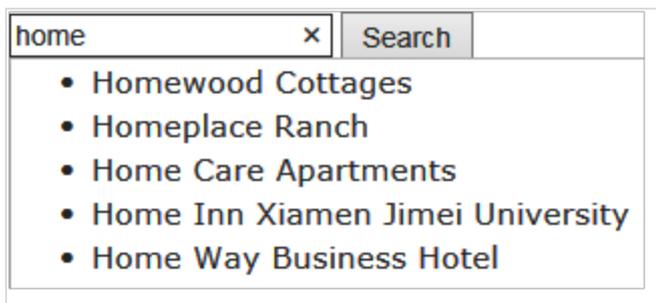
Note: The search term must exactly match a phrase since stemming is not supported. For example, *vegetable* does not exactly match *vegetables*. As a workaround, enter two phrases: *vegetable*

and *vegetables*.

4. In the **Synonym** field, enter a term (up to three words) that exists in your website content. Optimizely 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 suggestion list becomes more precise as a user types more characters.

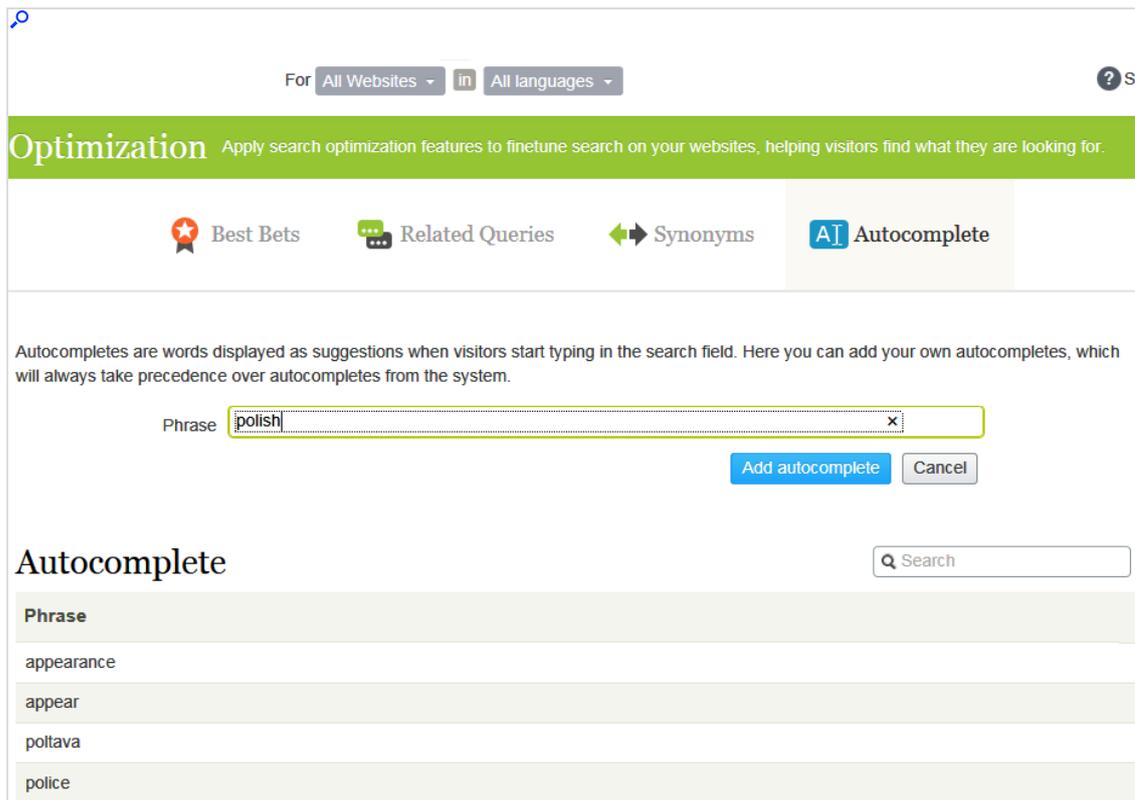
If a site visitor selects a suggestion, Optimizely Search & Navigation executes a query using that term. Autocomplete speeds up the search experience when it correctly predicts words being typed.

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

Optimizely Search & Navigation provides two sources of autocomplete suggestions.

- Manually entered, on the Optimizely Search & Navigation Optimization screen's **Auto-complete** 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 *poli*c results in one user clicking a search result that uses *poli*ce, Optimizely Search & Navigation makes *poli*ce an autocomplete suggestion for *poli*c. But, if you manually add *poli*cy as a suggestion, that term appears above *poli*ce 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 **Search & Navigation > 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.

Optimization Apply search optimization

Best Bets

Autocompletes are words displayed as suggestions that will always take precedence over auto completes 1

Phrase

Autocomplete

Phrase
road shoes
road bike
road cycling

ro| x

- road shoes
- road bike
- road cycling

Autocomplete suggestions below a search field

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.

Autocomplete

Phrase
road bike
road cycling
road shoes

Optimizing multiple sites and languages

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

Filtering on websites and languages

At the top of the most Optimizely 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.



Optimizely Search & Navigation indexes

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

In addition to the main index, your Optimizely 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, Optimizely 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 *fish-ing* 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 Optimizely Search & Navigation is determined when your organization orders an index and multi-language index support from Optimizely. 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 Optimizely CMS, and a different group of language analyzers in Optimizely Search & Navigation. This may confuse users because, while the language selector on Optimizely Search & Navigation screens might look like you are choosing content language, in reality, you are selecting an Optimizely 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.

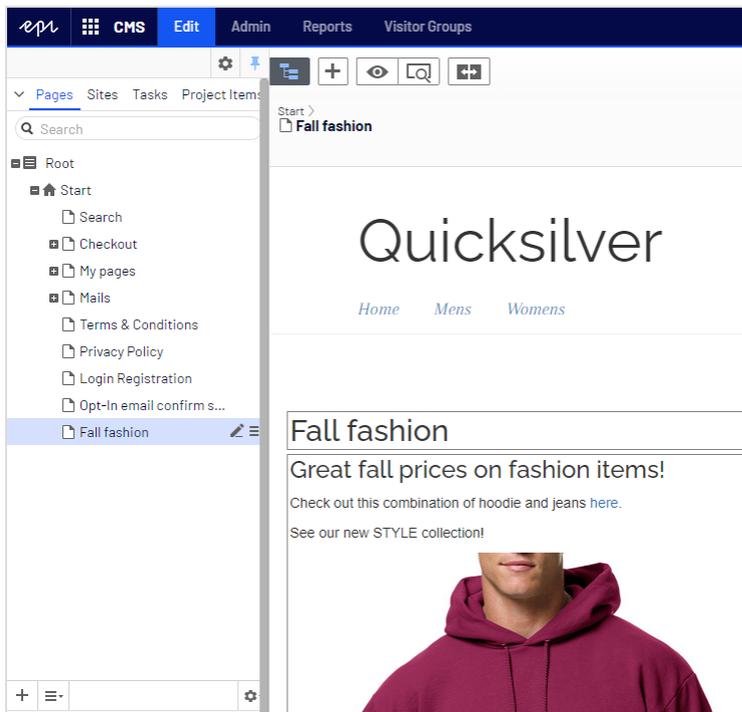
Optimizely Search & Navigation language analyzers are installed by a developer during implementation at a cost. Additional content languages can be added by a CMS administrator at any time and have no cost.

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 — Optimizely Search & Navigation automatically displays the translated versions. If a best bet's content is not translated, Optimizely 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.

For All Websites in All languages Show Help

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

All Websites
Fall Fashion Campaign
Fall Travel Campaign
Default Web Site

Best Bets Related Queries Synonyms 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.

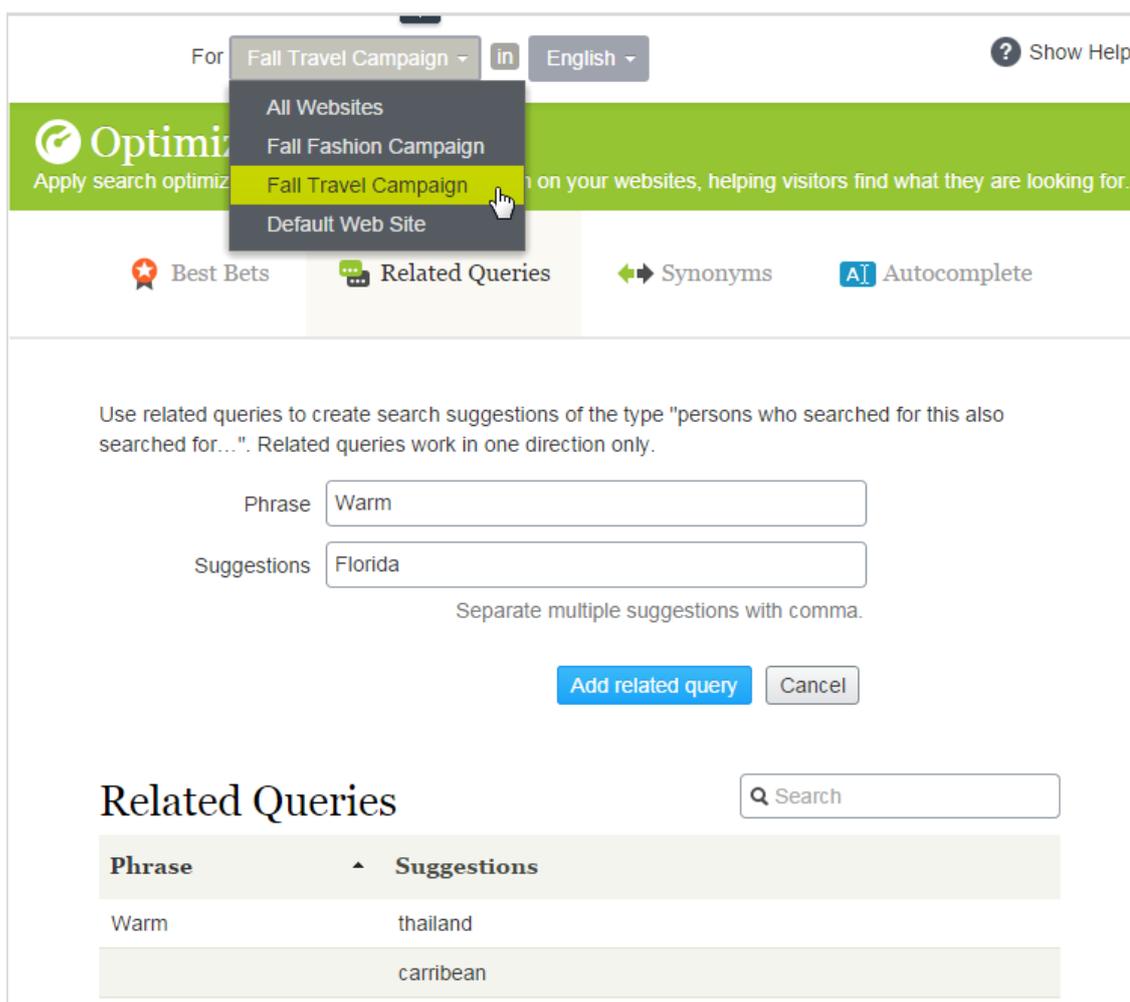
Add related query Cancel

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*.



- 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 Optimizely.

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

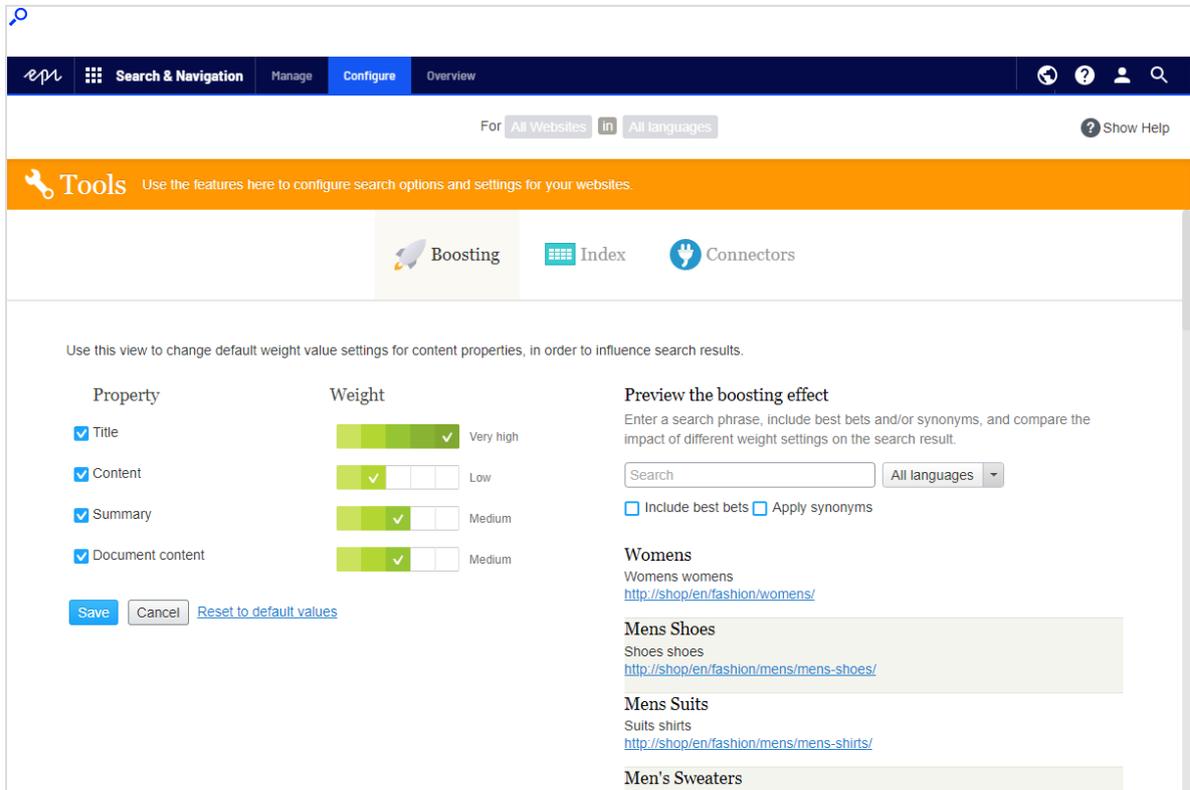
- [Boosting results through properties](#)
- [Clearing the index and reindexing](#)
- [Adding connectors](#)
- [Exploring the index](#)
- [Access rights](#)

Boosting results through properties

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

Optimizely 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

1. From edit view, select **Search & Navigation > 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.
2. In the **Weight** column, click a box to change a property's weight.
3. Click **Save**.

Notes about changing weight settings

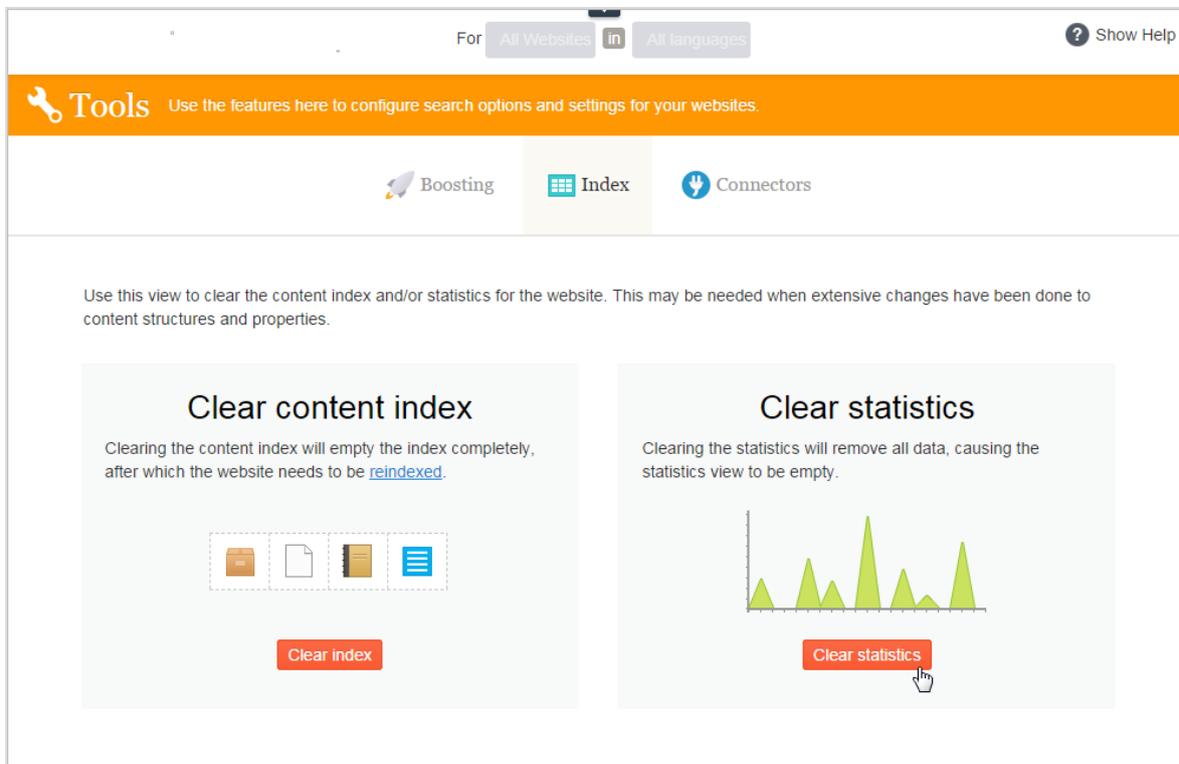
- To test the impact of property weight changes, click **Preview the boosting effect** from the right side of the Boosting screen.
- To revert the changes, click **Reset to default values** from the Boosting screen, under the list of properties.
- These settings affect search results for *all* content 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 Optimizely.

You can clear (that is, remove) the Optimizely 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.



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 **Search & Navigation > 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 **Optimizely 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 **Search & Navigation > 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 Optimizely.

A search connector lets Optimizely 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 Optimizely 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 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 **Search & Navigation > 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](#). Optimizely 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.

The screenshot shows a table with the following columns: Name, Type, Schedule, Status, Last indexed, Documents, and Start/stop job. A context menu is open for the 'EPI Server Knowledge Base' connector, showing 'Edit' and 'Delete' options. Callouts highlight the 'Refresh status' button, the 'Start/stop job' column, and the 'Context menu'.

Name	Type	Schedule	Status	Last indexed	Documents	Start/stop job	Context menu
Article base	Crawler	No	Indexed	Jun 29, 5:13 PM	0	▶ Start	
EPI Server Knowledge Base	Crawler	Every Monday at 1:00 PM	Indexing		9	▶ Stop	Edit Delete
EPI Server 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 Optimizely.

Most Optimizely 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.

Optimizely 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 **Search & Navigation > 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, Optimizely 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. Optimizely 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.

The screenshot shows the 'Explore' interface with the following elements:

- Search filters: 'For All Websites' and 'All languages'.
- Header: 'Explore View your index to see what has been indexed and when, and analyze the index details for a specific object.'
- Search bar: 'Filter'.
- Results summary: '248 results'.
- Item list table:

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

Below the list, a JSON snippet is shown:

```
{
  "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' sidebar:

Type	Count
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 Optimizely.

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

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

- **Administrators, WebAdmins, and SearchAdmins** can access the Optimizely edit view, Optimizely Search & Navigation search features, and access to the [Clear Indexes screen](#).
- **SearchEditors** can access the Optimizely edit view and the Optimizely 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 Optimizely Search & Navigation features in admin view.

Configuring access

The membership and role providers available for your website need to be configured to use the built-in groups and roles in Optimizely. This is typically done by a developer during site setup.

See [Managing users and user groups](#) for more information on how to work with user access.

Note: User access can be managed in different ways depending on the implementation. Contact your system administrator if you need help.

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 Optimizely 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 Optimizely 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.

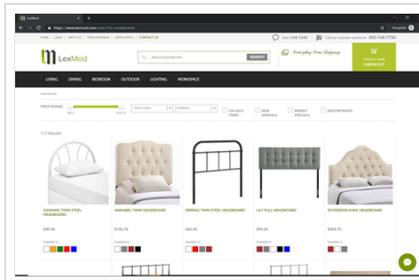
Note: Personalized Search & Navigation cannot affect external search results.

Other factors affecting search results

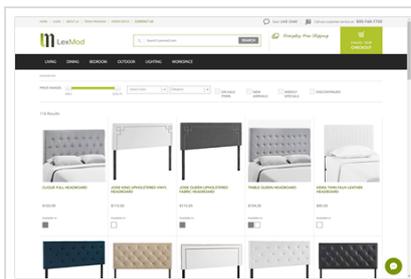
Ranking and weighting of search results can also consider a merchandiser's business rules or strategies. So, best-selling items, high conversion rates, most revenue, or most units sold can also be used to affect search results. The result is an optimal ordering of search results for every user.

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
Product			
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
Product			
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

Current attributes from peeries:

Attribute name	Attribute value	Boost factor
brand	puma	1.13452949173479
brand	beston	1.06757187388131
brand	faded glory	1.06757187388131

Enabling Personalized Search & Navigation

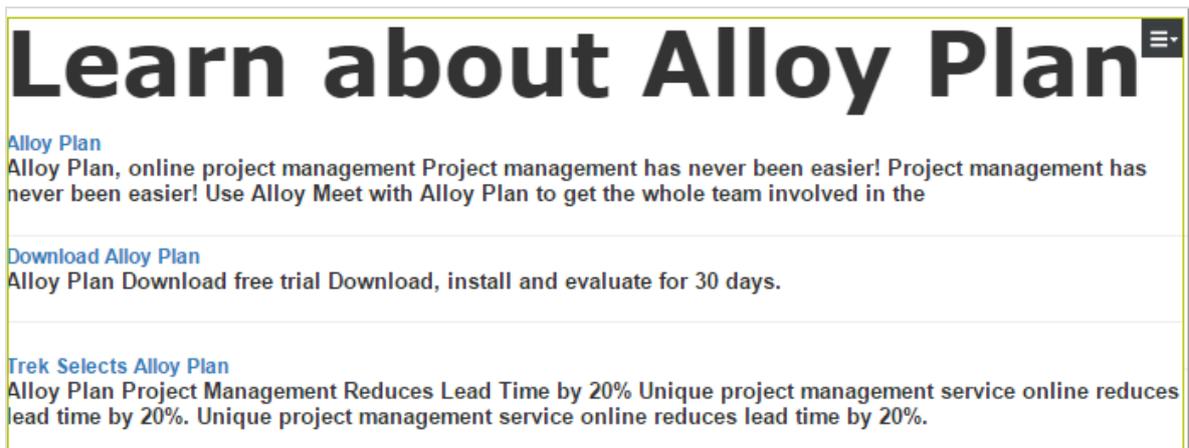
To add Personalized Search & Navigation, a developer needs to install and configure the personalization service on your website. The developer must also customize search queries so that the factors described above can boost results. For more information, see [Personalized Search & Navigation](#).

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 locations on your site.

Additional resources

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

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Optimizely Digital Experience Platform

The Optimizely Digital Experience Platform 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 Optimizely

At Optimizely, we're on a mission to help people unlock their digital potential. We equip teams with the tools and insights they need to experiment in new and novel ways. Now, companies can operate with data-driven confidence to create hyper-personalized experiences. Building sophisticated solutions has never been simpler. Learn how we unleash new limits at [optimizely.com](https://www.optimizely.com).

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