



Search Implementation Check List

Version 1.0

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Document History

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Table of Contents

- Search Implementation Check List 4**
- Initial Configuration Questions4
- Presentation4
- Content.....4
- Functionality.....5

Search Implementation Check List

Initial Configuration Questions

- Can the site support either cookie, http or user agent string based authentication?
- Does the site require double-byte search?
- How many URL starting points will be configured? For each starting point:
 - URL
 - Credentials (if applicable)
 - User agent string (if applicable)

Presentation

How many search templates will be needed for each Search template:

- In what format (styled HTML, data (xml, json, csv) for client-side or server-side consumption) should search results be returned?
- Will HTML / CSS be provided for the search results page? Will PSD's be provided instead?
- Are there any specific / important requirements for the look and feel of the search results?

Content

A standard CrownPeak search implementation assumes indexing of page content.

Will metadata fields be utilized during indexing?

- Field1 Name
- Field2 Name
- Add more fields as necessary

Will the content of binary files need to be indexed?

File type:

Note: Currently only .txt, .rtf, MS-Excel, MS-PowerPoint, MS-Word and .pdf are supported. Any embedded meta-data is ignored.

Will CMS-managed metadata on binary files need to be indexed?

- Field1 Name
- Field 2 Name
- Add more fields as necessary

Should pages / directories be ignored during indexing?

- List all pages to be ignored: (ex: Page1.aspx)
- List all Paths (relative or absolute) to be ignored: (ex: <http://Domain.com/directory>)

Should content within pages be ignored?

- List all page content sections by HTML/CSS elements: (ex: <div id="exclude" class="exclude">...</div>)

List filtering (facets) requirements:

- List all facets/categories/tags
- List user attributes to treat as tags to filter on

List Sorting requirements:

- Sorting options (select one)
 - Alphabetical
 - Relevance
- Any additional sorting requirements

Will Search index content from external sites?

For each external site:

- URL
- Credentials (if applicable):
- Respect/ignore robots.txt? (Please keep in mind, this is a global setting. Ignoring robots.txt applies to all sites)
- Pages to exclude
- Content to exclude

Functionality

- Is "Type Ahead" a requirement?
- Is "Did you mean this?" a requirement?

Note: This feature will, when no search results are returned, suggest alternate spellings / search terms that closely match the original search terms.

- List all tag-based (non user-entered) Related Content Search requirements (if applicable)? That is, only searching specific content fields or tags for matches.

Are Search Promotions a requirement?

For each search promotion:

- Keyword
- Associated Html returned

Are exact match redirects (Jump Words) a requirement?

Note: This feature will, when a search term exactly matches a word or one of a list of words will redirect the user to a specific URL instead of providing them with a list of search results. Ex: User searches "FAQ" user will be redirected to the FAQ page.

For each term:

- Word(s) to match
- Redirect URL

Will synonyms be used?

Note: This feature will, when performing a search will also return results that match any synonyms to any of the terms entered in the original search query.

For each term:

- Term
- Synonym(s)