

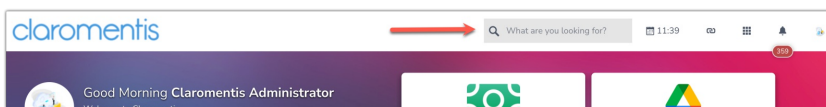
Optimise Your Global Intranet Searches

Claromentis uses Elasticsearch for Intranet searches.

This creates searchable indexes of data in applications across the Intranet.

What is global search?

Claromentis global search will search the whole site for matches to entered terms, which includes titles, text body, tags and metadata.

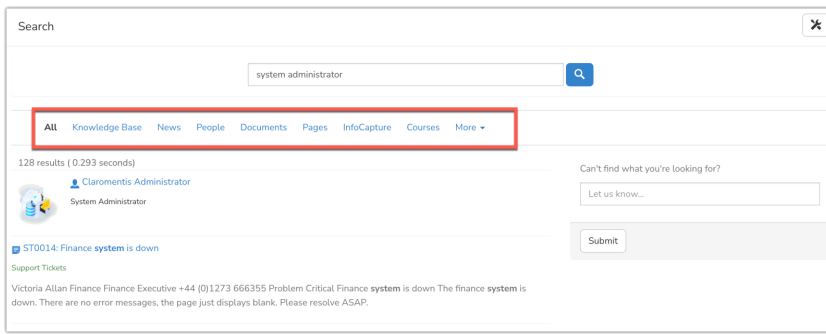


Whereas application-specific searches will only look for content related to the search terms within that application and in general offer more controls to refine this.

A screenshot of the Claromentis "Documents / Search" interface. The interface is divided into several sections for filtering search results. At the top, there is a "Keywords" search bar with a "Reset" button and a link to "Advanced search". Below this, there is a "Folder name" field with "Choose folder" and "Unset" buttons. The "Search keywords in" section has checkboxes for "Title", "Metadata", and "Content", all of which are checked. The "Search objects" section has checkboxes for "Documents" and "Folders", both of which are checked. The "Order results by" section has a dropdown menu set to "Relevancy". The "Tags" section has a "Tags" field with a "Tags" button. The "Created" section has "From" and "To" date pickers. The "Review Date" section has "From" and "To" date pickers. The "Results on the page" section has a dropdown menu set to "20". The "Modified by" section has a "Select user" dropdown and a "Browse" button. The "Last modified" section has "From" and "To" date pickers. The "Additional notes" section has a text field and a dropdown menu set to "All words". At the bottom, there is a "Search" button and a "Reset" button.

The Global search relies on finding results across the whole site based only on the keywords entered by the user.

Results can be filtered [per application](#) once the initial search is made however end users sometimes report not being given the results they would expect on the 'All' page.



How the search works

To optimise your site and its content to facilitate the best results, it's necessary to understand how the Claromentis search operates.

When a search is made:

- Exact matches with the search terms are pushed to the top of the results
- If multiple words are entered these are treated as if they are connected by 'or' and searched individually too
- Like any search engine, there is a level of fuzziness that could affect the order and relevancy of the results

A fuzzy search looks for text that matches a term closely instead of exactly and helps find relevant results even when the search terms are misspelt.

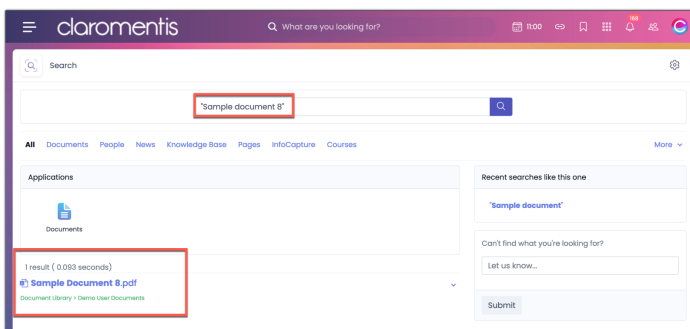
So, this means when a search is performed, the system will prioritise exact matches to the overall term entered first, then each word separately, as well as fuzzy results.

e.g. if you're searching for 'System administrator' Claromentis will return results for 'system administrator', 'system', 'administrator' and the fuzzy alternatives.

Please note: Search operators e.g. * () - OR AND etc will not work in Claromentis searches.

For situations where entered terms must be searched exactly, this can be achieved by using quotation marks. e.g. searching for a specific document.

Only results that match the entered terms exactly will be given:



Optimise your Search

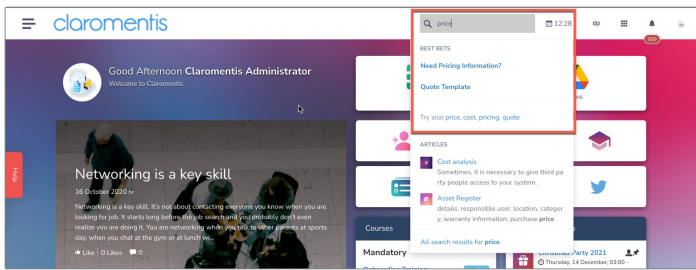
If you are finding that results are not as relevant as you would expect or need, implement the methods below to combat this.

- Set up search recommendations and best bets

This will allow you to cherry-pick the most relevant results for certain search terms and have these appear at the top when they are used.

See our [Search Recommendation](#) guide for more information and steps to set these up.

Admin / Search Admin / Search Recommendations			
Indexing/Searching Service	Search Recommendations	User Requests	
Search Recommendations	+ Add Search Recommendation		
Group Name	Search Terms	Suggestions	Best Bets
Pricing Information	price, cost, pricing, quote	price, cost, pricing, quote	Need Pricing Information? Quote Template
Training	training, train the trainer	training, train the trainer	Training Brochure



- Enable user search suggestions and their associated notifications

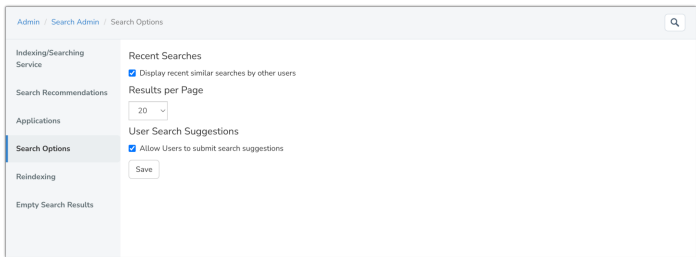
Allow users to describe what they cannot find through searching and submit this for administrators to see listed in a 'User requests' area.

Administrators can review the suggestion and action as required to proactively fill any gaps in the search to ensure relevant results are being given over time.

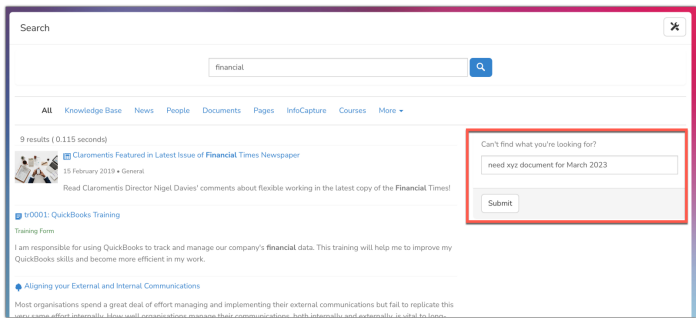
Administrators can be notified when a suggestion has been submitted, allowing them to check what it is and:

1. Add the relevant terms into a Search recommendation so that those terms will now return appropriate results
2. Reach out to the user if the content they are requesting is not in the Intranet or a location they do not have permission to see, as this is outside the realms of global search to resolve.
3. Review Search recommendations if similar suggestions keep being submitted despite what has been set up already and tweak these

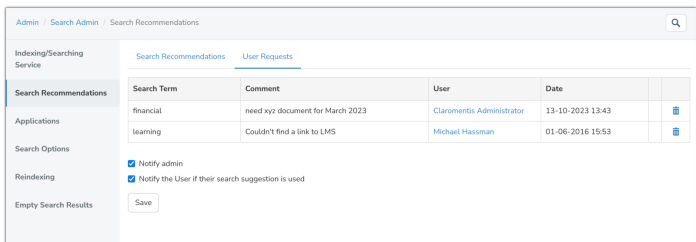
Head to **Admin > Search > Search options enable user suggestions**.



The area below will appear when searches are made for users to make submissions:



Submissions appear in **Admin > System > Search recommendations > User requests** for administrators to action.

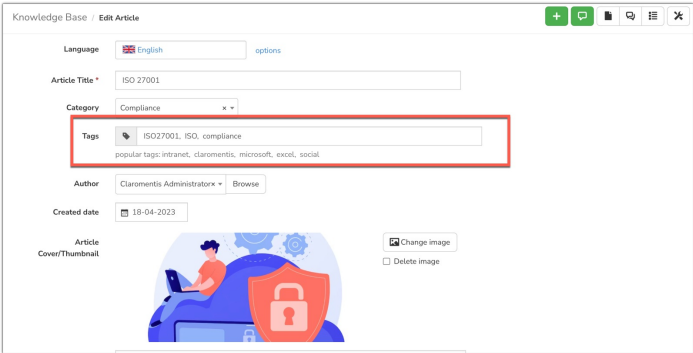


We recommend turning on the notification for the administrators so all Search application administrators are notified when a suggestion is made, otherwise, they will need to periodically check this area to see what has been logged.

There is also the option to notify the user who made the suggestion if their term is used in a search recommendation which is a great way to automate their update about this and allow them to search again to find the needed content.

- Start using Tags or add more to further differentiate content

Instruct all your Intranet administrators and content creators to implementtags whenever they add new content to the site.



Tags are checked when searches are made so they are an easy way to affect results in the way you need them.

Some applications also offer tag clouds for easier searching than terms being typed in.

Tags are a quick way to diversify your content and improve its appearance in related search results.

