

SITE *Executive*TM

SAI | SYSTEMS ALLIANCE, INC.

SiteExecutive Version 2013 EP1 **Search Application User Guide**

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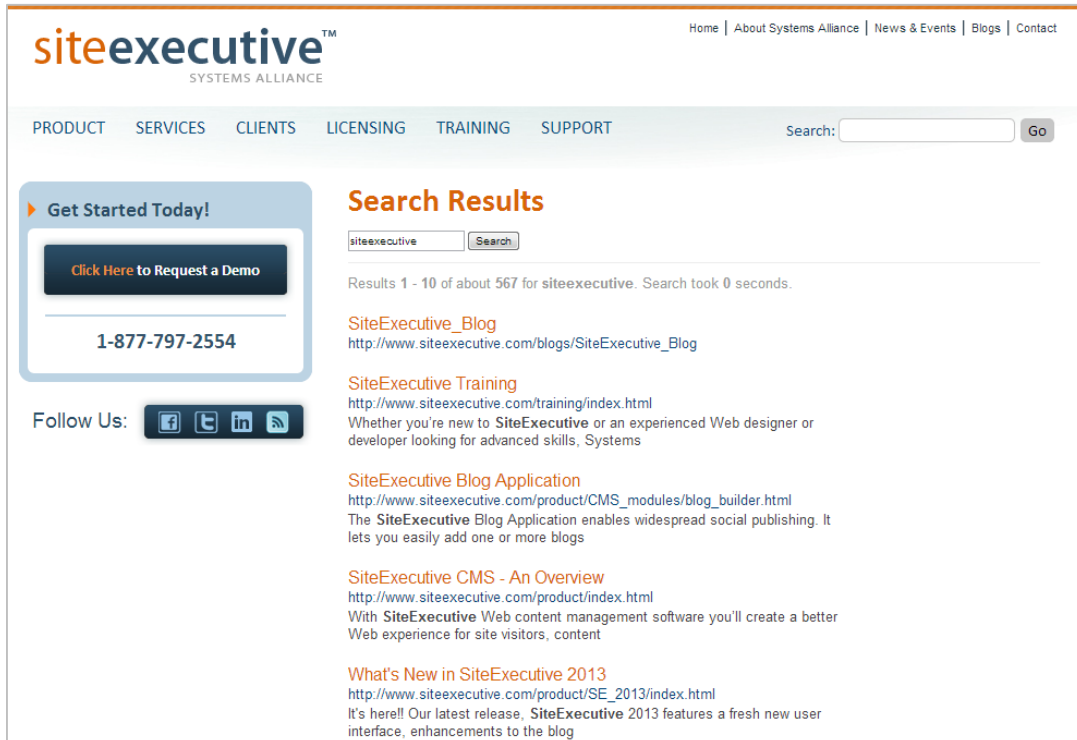
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1. Introduction to the Search Application

The Search Application provides users with a simple interface to perform searches on websites built in SiteExecutive. Powered by the Apache Solr engine, site visitors can use it to search for content in areas as big as the entire SiteExecutive instance or as small as specific directories within the site.



Search results are displayed in a list in order of relevancy with the search term(s) highlighted.



The Search Application can be implemented in SiteExecutive websites either as a viewlet on a page or as its own section of the website. It can be styled using a Template to look just like other pages on the website for seamless integration into its look and feel.

Search Application instances can be deployed at the site or folder level. Deployed Search Application instances have their own URLs, so they can be bookmarked and accessed from the address bar like pages.

Some examples of content that can be searched with the Search Application are:

- Pages & Folders
- Images & Videos
- Uploaded files & documents
- Calendars & calendar events
- Blogs & blog posts
- Profile Directories
- Structured Content
- Other deployed applications in SiteExecutive
- Meta Tag content

All objects in SiteExecutive can be searched with the Search Application except:

- Content not marked as “Searchable”
- Unindexed folders and sites
- Unpublished content (pages, templates, etc.)
- Content not located on the site tree (e.g. Template & Stylesheet collections, administrative users and user groups)
- Templates and stylesheets

NOTE: Before the Search Application can be used, the Search Index utility must be run. Section 2 outlines the steps behind this process.

2. Search Indexing

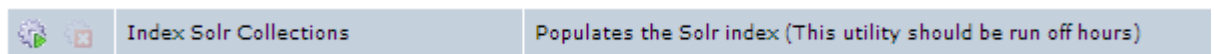
The Solr search engine maintains a database of searchable objects by using indexes. Whenever an object is created, deleted or otherwise modified, the search index is updated automatically. However, there is one exception to this rule: when applications or Structured Content collections are renamed, their indexes will not be updated until the next time the index is run.

The database of indexes is updated through **Scheduled Indexing** at the root level. Indexing should be scheduled to run daily or weekly in order to maintain an accurate search index, and it should be run off-hours to ensure that site visitors and SiteExecutive users do not experience slow loading times during the process.

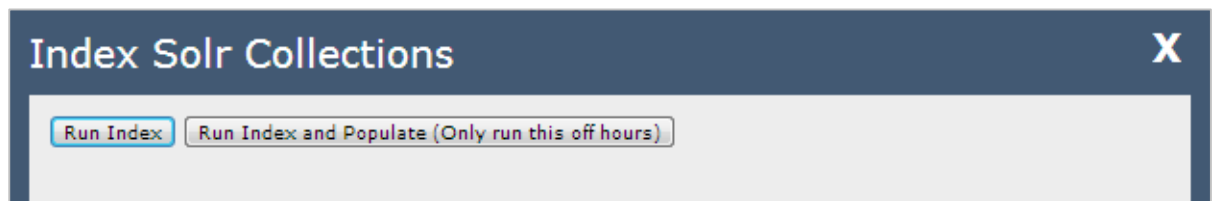
2.1 Manually Running Search Index

To update the SiteExecutive search index manually:

1. At the ROOT level, select the **Utilities** tab.
2. In the System Utilities menu, locate the utility labeled **Index Solr Collections** and click **Run Index Solr Collections**, located in the Actions column:



The Index Solr Collections dialog box opens:



3. Click Run Index.

The search index is cleared, and the scheduled index is run. The dialog box updates with a confirmation that these operations have been performed.

NOTE: "Run Index and Populate" should only be run once after installing a brand new SiteExecutive instance or after upgrading to SiteExecutive 2013 EP1.

2.2 Scheduling Automatic Search Indexing

To schedule search indexing in SiteExecutive:

1. At the ROOT level, select the **Search Index** tab.

The Search Index Options menu loads:

Search Index Options: ROOT

Desktop Link Validation Search Index Utilities Properties Audit Log

Scheduled Indexing

Scheduled indexing has not been run.

Enable Scheduled Indexing:

Scheduled Time: 12 : 00 AM

Interval: -- Choose One --

Notification Email Address:

Update Reset

2. Check the box labeled **Enable Scheduled Indexing**.
3. Enter a time for Solr to run the search index.
NOTE: As a best practice, it is recommended to schedule search indexing off-hours, or at a time when site traffic is minimal.
4. Select an interval (Daily or Weekly) from the drop-down menu labeled **Interval** for the search index to run.
5. Enter an email address to be notified when the scheduled index is run (optional).
6. Click **Update**.

Search indexing will be scheduled for the given time and interval.

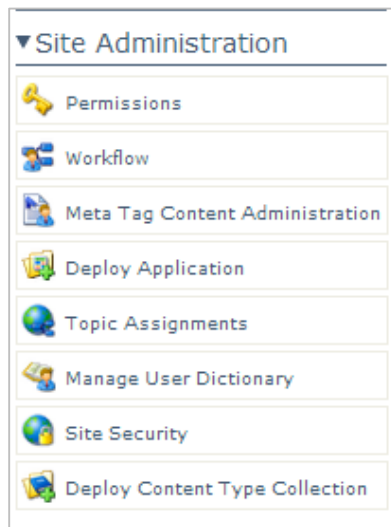
3. Using the Search Application

The Search Application can be implemented on a SiteExecutive site in two ways: by allowing users to access an application instance directly, or through an application viewlet on a page or template. In order to enable the use of a Search Application viewlet, SiteExecutive must contain a deployed instance of the Search Application.

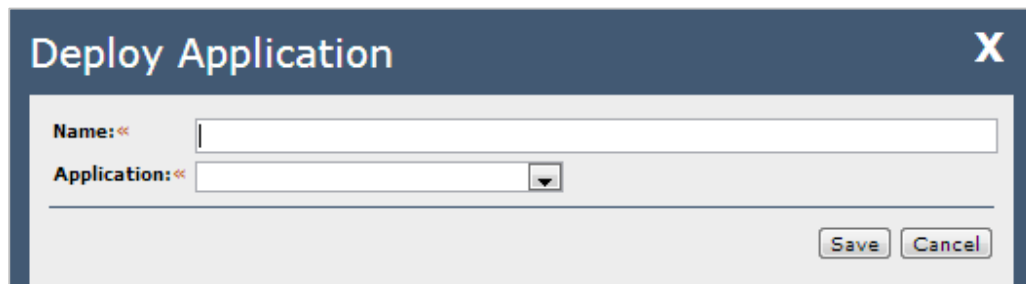
3.1 Deploying the Search Application

To deploy an instance of the Search Application:

1. Select the site or folder in the site tree where the application will be deployed.
2. In the Actions bar on the right hand side, click **Site Administration**.
3. Under **Site Administration**, click **Deploy Application**.



The Deploy Application dialog box appears:



The available fields are:

- **Name:**« The name of the application instance. This will display in the SiteExecutive Site Tree and in the URL of the application. This field is required.
 - **Application:**« The type of application instance to deploy. This field is required.
4. Enter a name in the **Name** field and select **Search Application** from the **Application** dropdown field.
 5. Click **Save**.

The Deploy Search Application dialog box appears:

The screenshot shows a dialog box titled "Search Application" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Title:** « [Empty text box]
- Template:** « [Empty dropdown menu] [Help icon]
- Default Style:** Yes | No
- Active:** Yes | No
- Button Type:** [Help icon] Text Image
- Button Text** « [Text box containing "Search"]
- Result Count** « [Text box containing "10"]
- Search Box Label** [Help icon] « [Text box containing "Enter Search Phrase"]
- Button Label** [Help icon] « [Text box containing "Search"]

At the bottom right of the dialog are two buttons: **Save** and **Cancel**.

The available fields are:

- **Title:**« The title of the search application. This title will display on any Site Information or Navigation modules used by the template and at the top of the user's browser window. This field is required.
- **Template:**« The template that will be applied to the search application. This template controls the look and feel of the search application as rendered on the visitor's machine. This field is required.

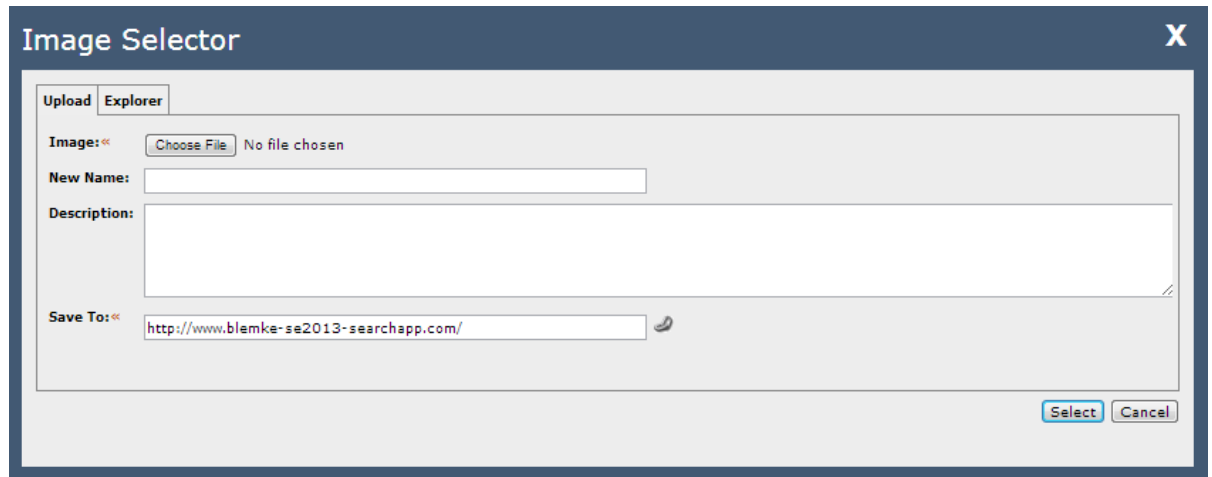
- **Default Style:** Determines whether or not the default style is rendered on the search box. If “no” is selected, SiteExecutive will only render the HTML of the search box.
 - **Active:** Determines whether or not the application can be accessed.
 - **Button Type:** Determines the type of button for running the search:
 - **Text:** A standard button with text
 - **Button Text** « Text to be displayed on the search button. This field is required.
 - **Image:** A clickable image
 - **Result Count** « Number of search results that will be displayed per page of results. This field is required.
 - **Search Box Label** « The HTML label for the search box field. This field is required. Used primarily for accessibility.
- Button Label** « The HTML label for the button field. This field is required. Used primarily for accessibility.

NOTE: If the default style is disabled, the Search Box Label and Button Label fields will display around the search box and button, respectively.

Selecting **Image** underneath **Button Type** replaces the **Button Text** field with the **Button Image** select field:

The screenshot shows a configuration panel for the search button. At the top, it says "Button Type:" followed by two radio buttons: "Text" (unselected) and "Image" (selected). Below this, there is a label "Button Image" followed by a text input field. Underneath the input field is a large empty rectangular box intended for an image. To the right of this box are two buttons: "Select" and "Deselect".

Click **Select** to select an image. The Image Selector dialog box opens:

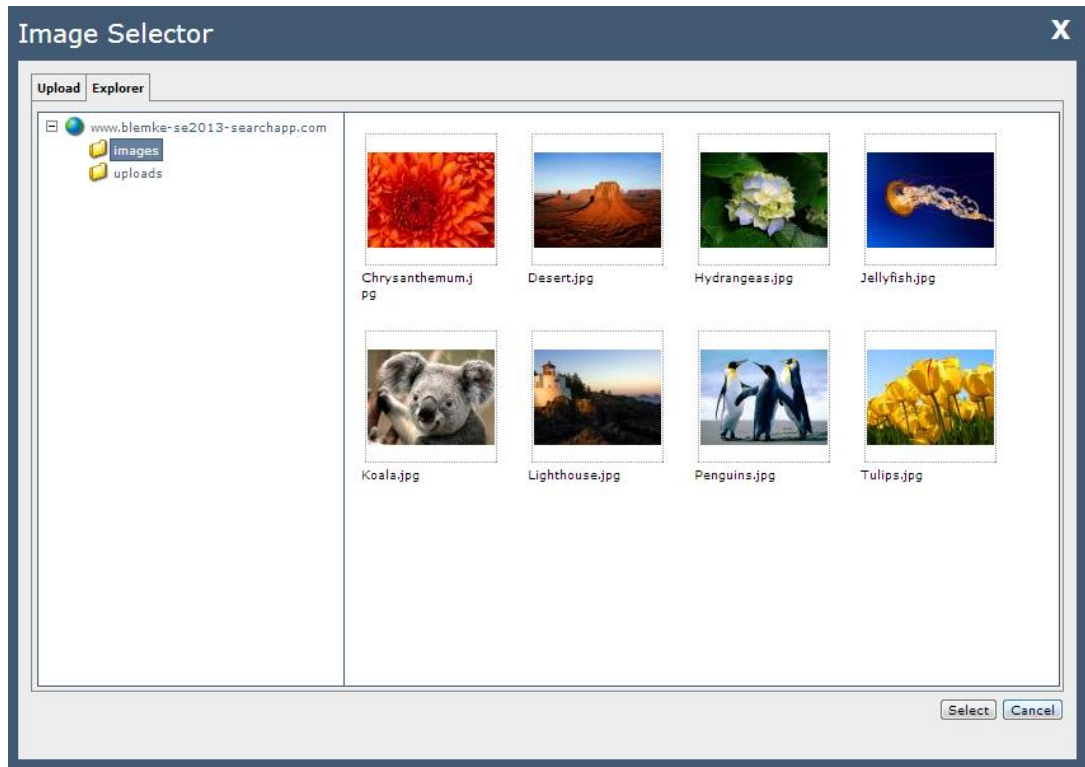


There are two options for specifying an image for the button: uploading an image from the hard drive and selecting an existing image in SiteExecutive through the Explorer.

The available fields in the Upload tab are:

- **Image:«** Prompts the user to select an image from the hard drive. This field is required.
- **New Name:** Specifies a new filename for the uploaded image.
- **Description:** A short text description of the image.
- **Save To:«** Specifies the location in SiteExecutive where the uploaded image will be saved. This field is required.

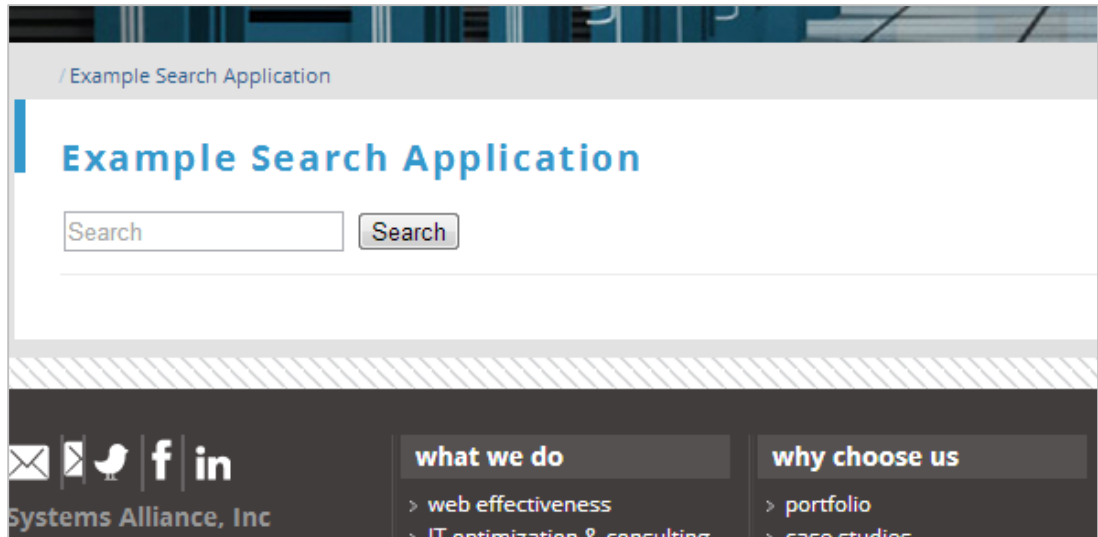
Clicking **Explorer** at the top of the window will switch the window to the **Explorer** tab. Navigate to the site or folder where the desired image is stored:



Click on the desired image and then click **Select**. The Image Selector dialog box returns to the Search Application dialog box with the image selected.

6. Fill in the information and click **Save**.

The Search Application instance is deployed in the site or folder selected.



3.2 Adding a Search Application Viewlet

Search Application viewlets can be added to pages or templates once a Search Application has been deployed to a folder or site.

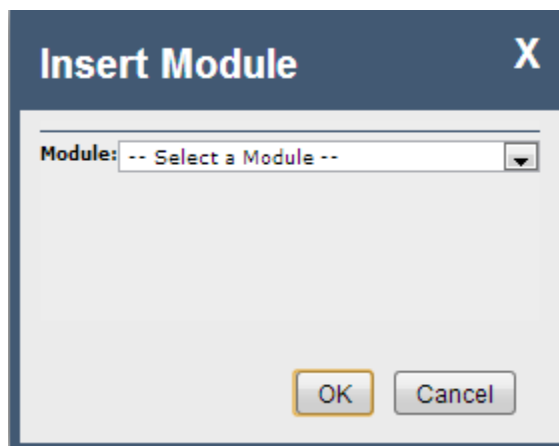
To add a Search Application viewlet to a page or template:

1. Select the desired page or template in SiteExecutive Explorer.
2. Select the **Preview/Edit** tab.
3. Click Edit Page/Edit Template.

The page or template will appear in edit mode.

4. Click the **Insert Module** icon.

The Insert Module dialog box appears.



5. Select Application Viewlet and click Insert.
6. Choose **Search Application / Search Box** from the Viewlet dropdown and click **Select**.

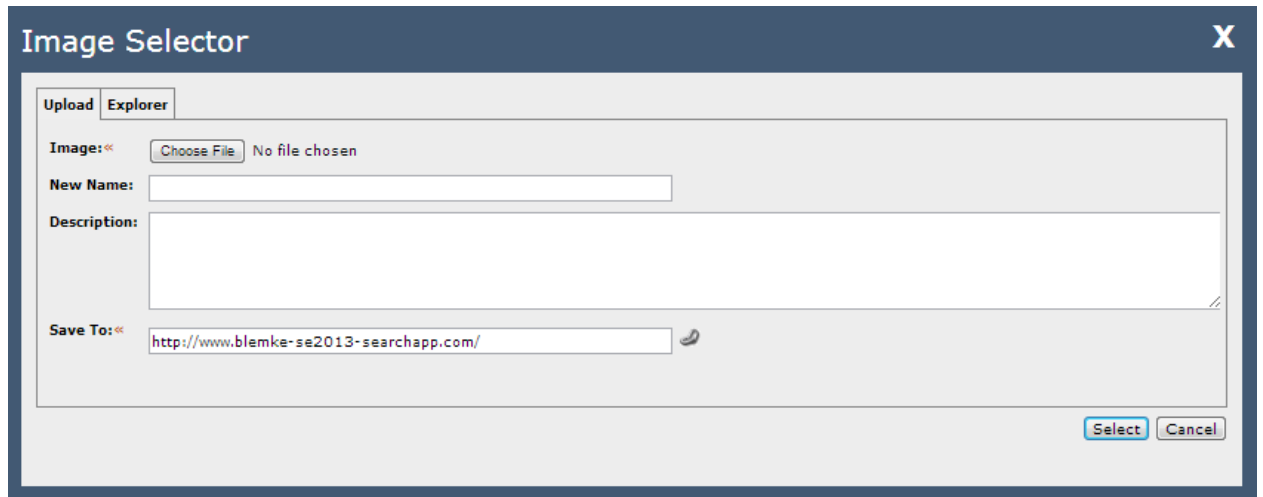
The Module Properties dialog box appears with options for modifying the search box.

The available fields are:

- **Search Application** « Specifies which deployed Search Application instance to load in the viewlet. This field is required.
- **Use default styles:** Determines whether or not the default style is rendered on the search box. If “no” is selected, SiteExecutive will only render the HTML of the search box.
- **Button Type:** Determines the type of button for running the search:
 - **Text:** A standard button with text
 - **Button Text** « Text to be displayed on the search button. This field is required.
 - **Image:** An image that can be selected

Selecting **Image** replaces the **Button Text** field with the **Button Image** select field:

Click **Select** to select an image. The Image Selector dialog box opens:

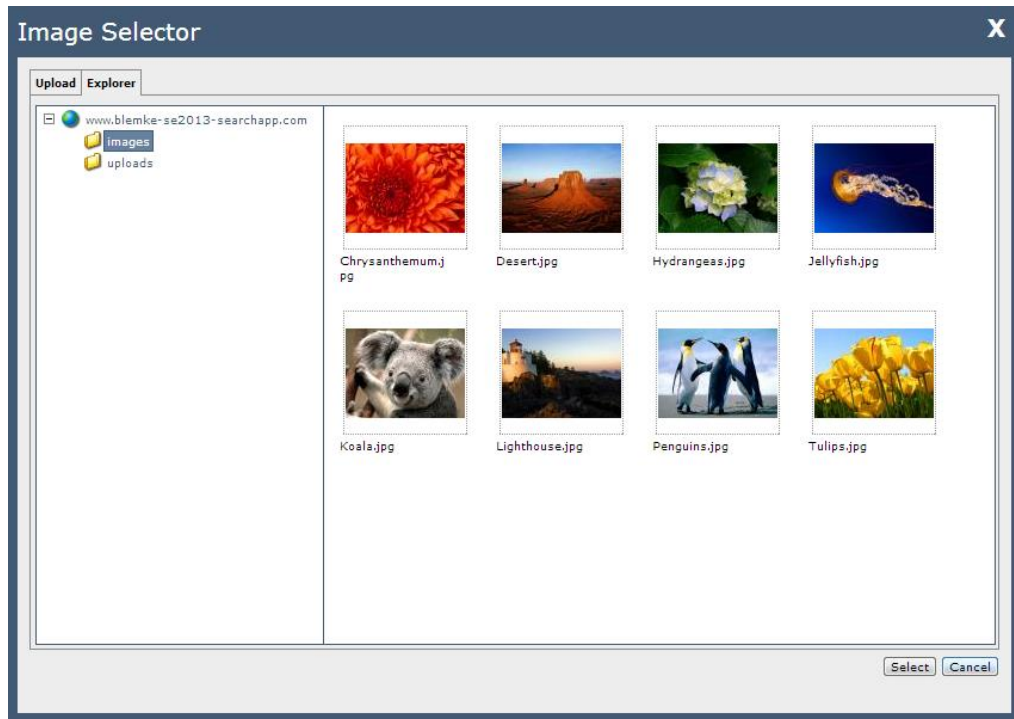


There are two options for specifying an image for the button: uploading an image from the hard drive and selecting an existing image in SiteExecutive through the Explorer.

The available fields in the Upload tab are:

- **Image:«** Prompts the user to select an image from the hard drive. This field is required.
- **New Name:** Specifies a new filename for the uploaded image.
- **Description:** A short text description of the image.
- **Save To:«** Specifies the location in SiteExecutive where the uploaded image will be saved. This field is required.

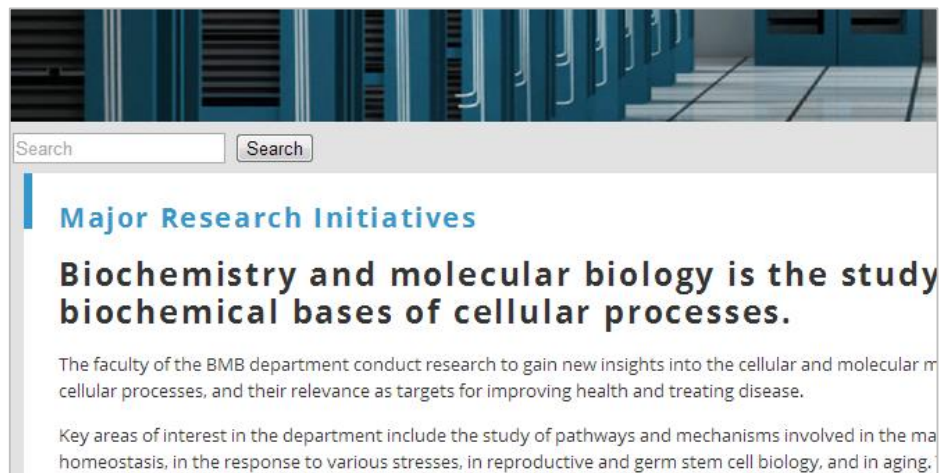
Clicking **Explorer** at the top of the window will switch the window to the **Explorer** tab. Navigate to the site or folder where the desired image is stored:



Click on the desired image and then click **Select**. The Image Selector dialog box returns to the Module Properties dialog box with the image selected.

7. Fill in the information and click **Save**.

The Search Application viewlet is inserted on the page or template.

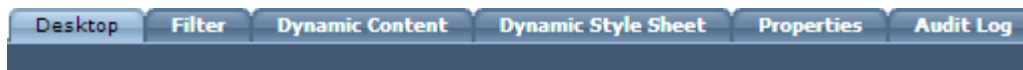


3.3 Search Application Interface

The Search Application can be managed at the deployed application level and the application explorer level. Different tabs are available at each level, and these tabs provide access to additional functionalities. While a brief description of each tab follows in the next two sections, the functionalities available in the tabs are explained in-depth in the upcoming sections.

3.3.1 Deployed Application Interface

At the deployed application level, the Search Application displays six tabs.



- **Desktop:** Allows users with **Admin** permissions to move, rename or delete the application, as well as specify application security and permissions. Users with **Write** permission can only move the application.
- **Filter:** Allows users with **Admin** permissions to define objects to be included in searches run by the application and objects to be excluded.
- **Dynamic Content:** See the **Template and Style Sheet User Guide** for more information on the Dynamic Content tab.
- **Dynamic Style Sheet:** See the **Template and Style Sheet User Guide** for more information on the Dynamic Style Sheet tab.
- **Properties:** This tab displays the options chosen when the application instance was deployed. Users with **Admin** permissions can edit this tab and change the properties of the application instance at any time.
- **Audit Log:** This tab logs information about changes made to the application instance, such as updates to its inclusions and exclusions in the search filter.

3.3.2 Application Explorer Interface

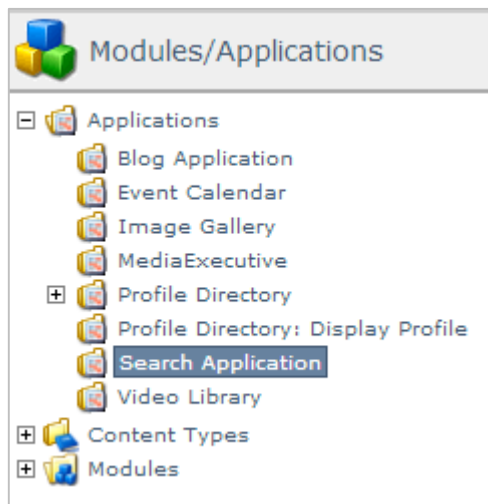
At the application explorer level, the Search Application displays four tabs.



- **Desktop:** Allows users with **Admin** permissions to set permissions for the Search Application.
- **Extensions:** Allows users to upload and modify custom viewlets and containers for the Search Application.
- **Usage:** Allows users with at least **Write** permissions to view a list of deployed Search Application instances.
- **Audit Log:** This tab logs information about changes made to Viewlets and Containers in the Extensions tab.

To access these options:

1. In the Site Tree, select **Modules/Applications**.
2. Under Modules/Applications, expand **Applications**.
3. Select **Search Application**.



3.4 Managing the Search Application

Through the **Desktop** tab, users are able to rename, move and delete application instances. Users with **Admin** permissions can set permissions and security for the instance.

3.4.1 Rename Application Instance

To rename an application instance:

1. On the **Desktop** tab of an application instance, click **Rename**.



The Rename dialog appears:



2. Enter a new name in the **Name** field.
3. Click **Save**.

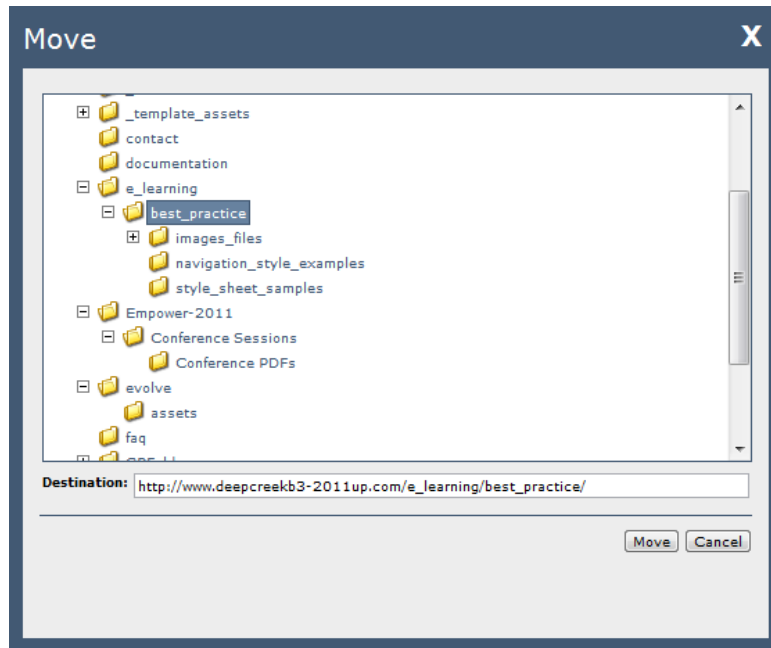
3.4.2 Move Application Instance

To move an application instance:

1. On the **Desktop** tab of an application instance, click **Move**.



The Move dialog appears:

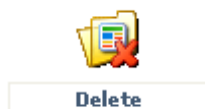


2. Using the dialog, select a new destination in the site tree for the application instance.
3. Click **Move**.

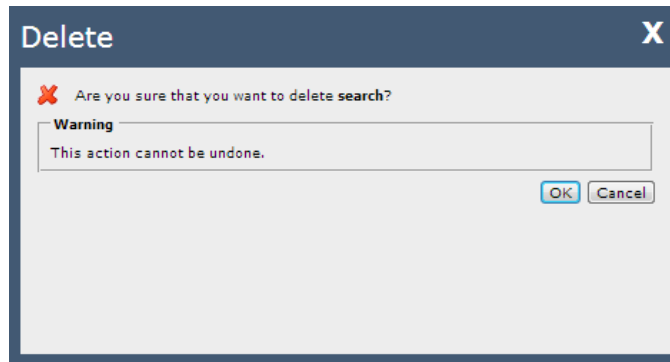
3.4.3 Delete Application Instance

To delete an application instance:

1. On the **Desktop** tab of an application instance, click **Delete**.



A warning dialog appears:



2. Click **OK**.

The Search Application instance is deleted.

3.5 Search Filtering: Inclusions & Exclusions

In the **Filters** tab at the deployed application instance level, users can specify where the application instance will run search queries using **Inclusions** and **Exclusions**.

Inclusions specify areas in SiteExecutive where the Search Application will search when queried, and **Exclusions** specify areas where the application instance will *not* search when running queries.

The following objects can be defined as **Inclusions** and **Exclusions**:

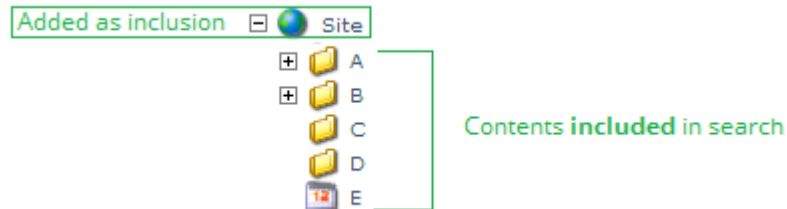
- Folders
- Sites
- Deployed application instances
- Content collections

NOTE: Without any inclusions or exclusions defined, Search Application instances will search in all areas of SiteExecutive.

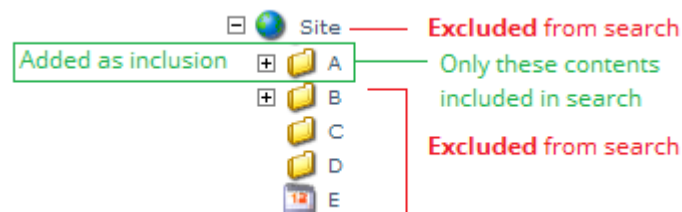
3.5.1 Rules for Inclusions & Exclusions

Rules for Inclusions:

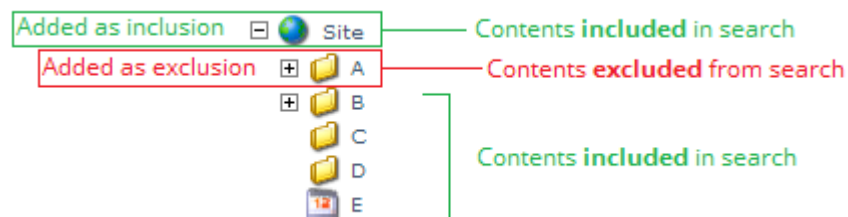
- If a website is added as an **Inclusion**, then all items below the website are included and search results should be returned for those items.



- If a single object is added as an **Inclusion**, the application instance will *only* search that object's contents and the contents of any child objects.

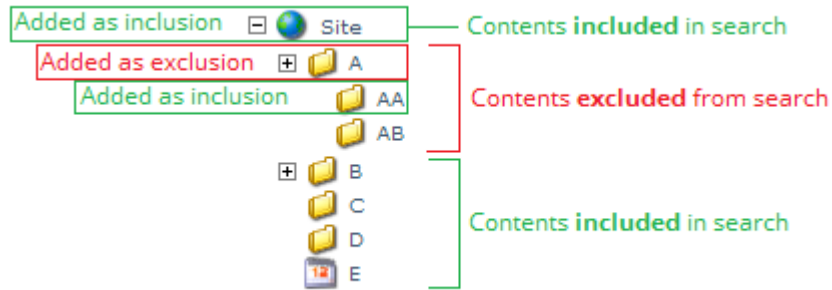


- If a website is added as an **Inclusion** and a folder within this website is **excluded**:
 - Search results should be returned for the website's contents.
 - Search results should **not** be returned for the excluded folder and its contents.



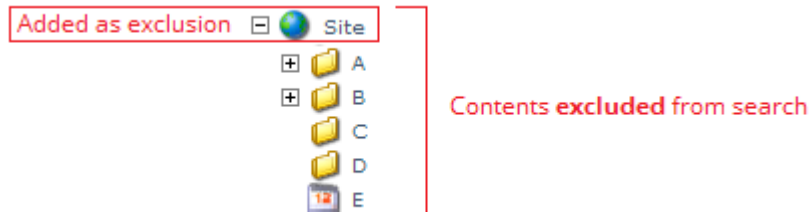
- If a website is added as an **Inclusion**, a folder (A) is **excluded**, and then an item within folder A is **included**:

- Search results should be returned for the website's contents.
- Search results should **not** be returned for folder A's contents.
- Search results should **not** be returned for any items added as **Inclusions** within folder A. This is because **Exclusions take priority over Inclusions.**

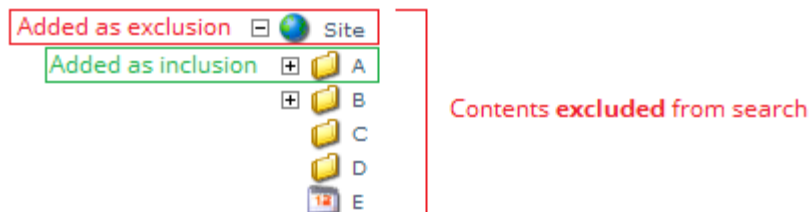


Rules for Exclusions:

- If a website is added as an **Exclusion**, then all items within the website are excluded and should **not** return search results.



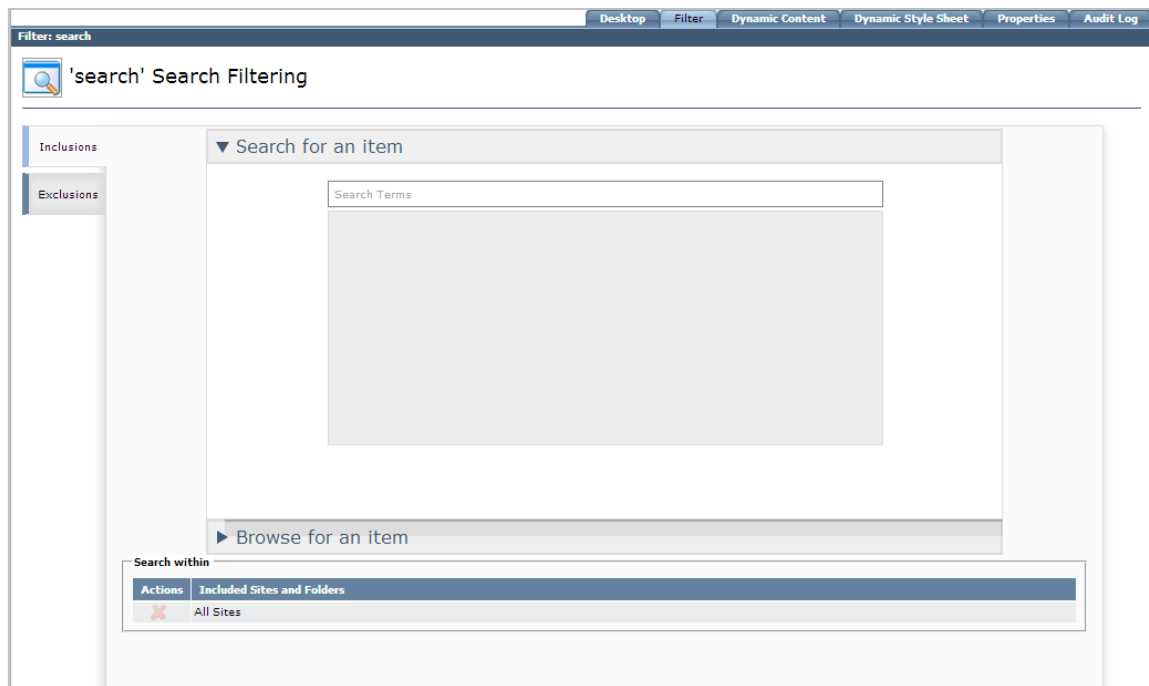
- If a website is added as an **Exclusion** and a folder beneath the website (A) is added as an **Inclusion**:
 - Search results should **not** be returned for the website's contents.
 - Search results should **not** be returned for folder A's contents. This is because **Exclusions take priority over Inclusions.**



3.5.2 Adding & Removing Inclusions

To add an **Inclusion** to a deployed Search Application instance, select a deployed Search Application instance and click on the **Filter** tab.

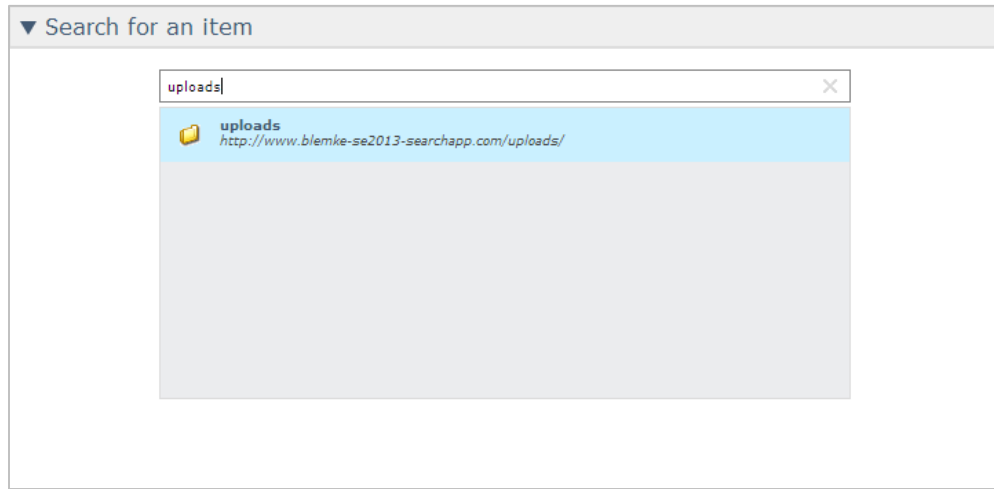
The Search Filtering menu loads:



By default, the **Inclusions** tab is selected. **Inclusions** and **Exclusions** can be added either by searching for an item or by browsing for an item through the SiteExecutive directories.

To add an **Inclusion** by searching for an item:

1. Enter a search term in the Search Filtering search box.



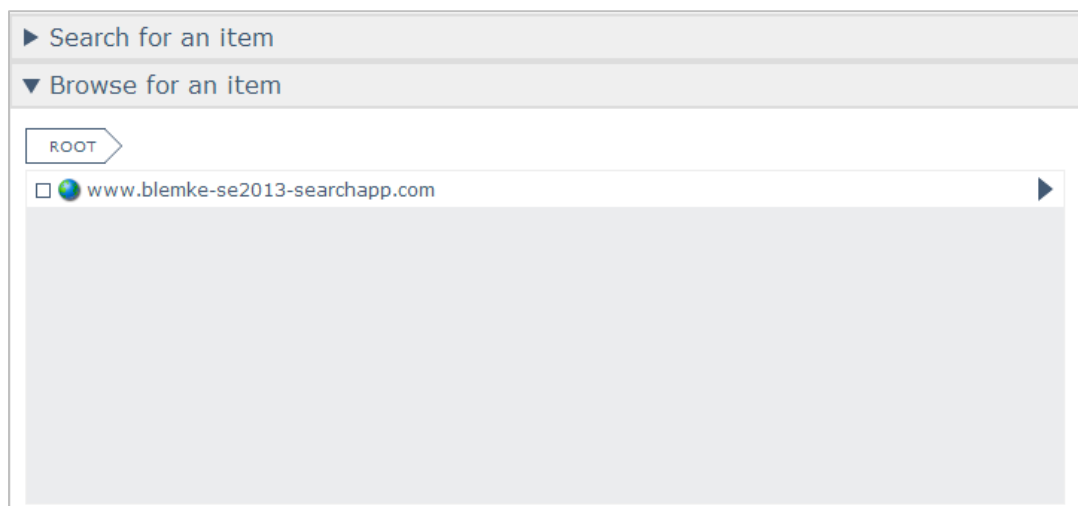
The search results populate below the search box dynamically.

2. Select the desired item.

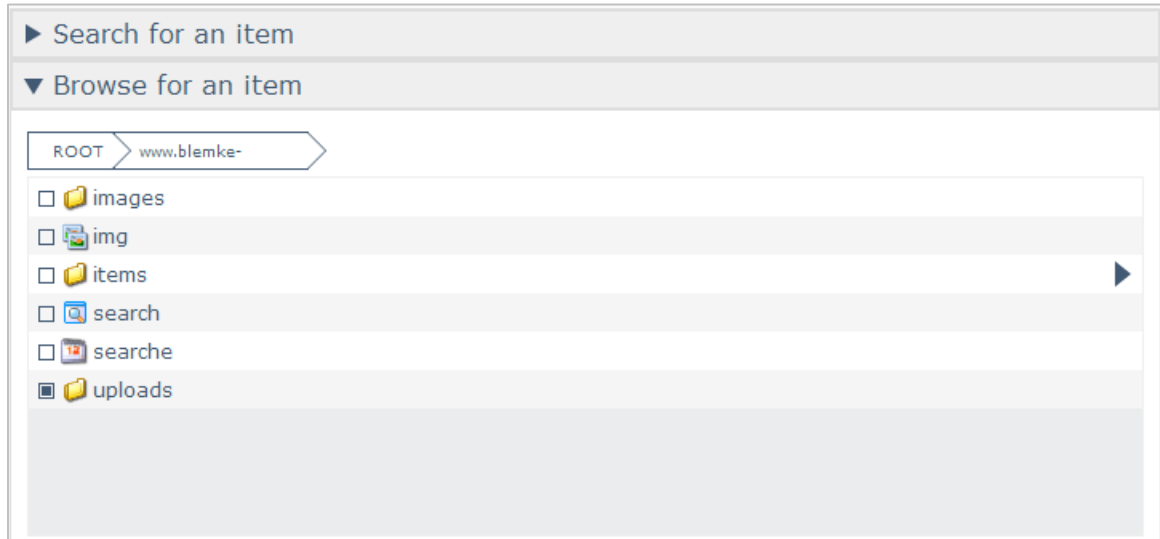
The selected item appears under the **Search within** table below the item selector. The address of the item is listed under **Included Sites and Folders**. The item selected will no longer appear in search results in the **Inclusions** tab.

To add an *Inclusion* by browsing SiteExecutive for an item:

1. Expand the **Browse for an item** menu within the Search Filtering menu.
The **Search for an item** menu collapses, replaced by the **Browse for an item** menu:



Navigate to lower levels of the directory by clicking on an item that has an arrow next to it.



Items that have already been added as **Inclusions** will appear to be selected.

2. Check the box next to the item to be added as a filter.

The selected item appears under the **Search within** table below the item selector. The address of the item is listed under **Included Sites and Folders**. It will remain selected in the **Browse for an item** table.

To remove an *Inclusion*:

1. In the inclusions table at the bottom of the Search Filtering menu, click the **Remove** icon next to the address of the item to be deleted:

Actions	Included Sites and Folders
	http://www.blemke-se2013-searchapp.com/uploads/

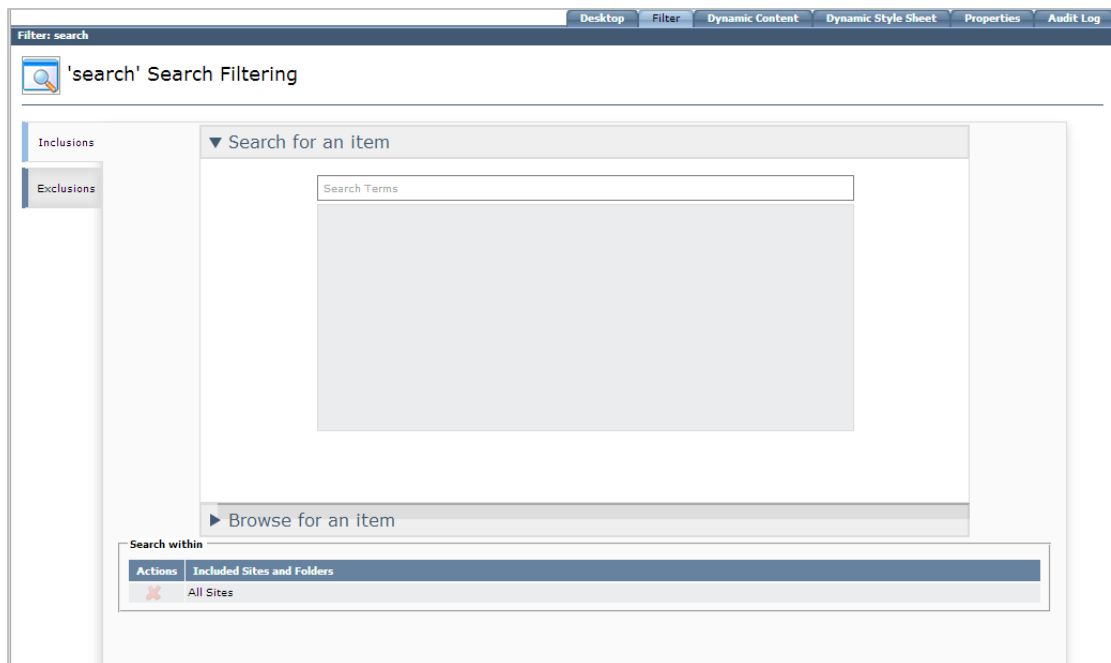
A confirmation alert will display: "Remove this item from filter?"

2. Click **OK**.

3.5.3 Adding & Removing Exclusions

To add an **Exclusion** to a deployed Search Application instance, select a deployed Search Application instance and click on the **Filter** tab.

The Search Filtering menu loads:

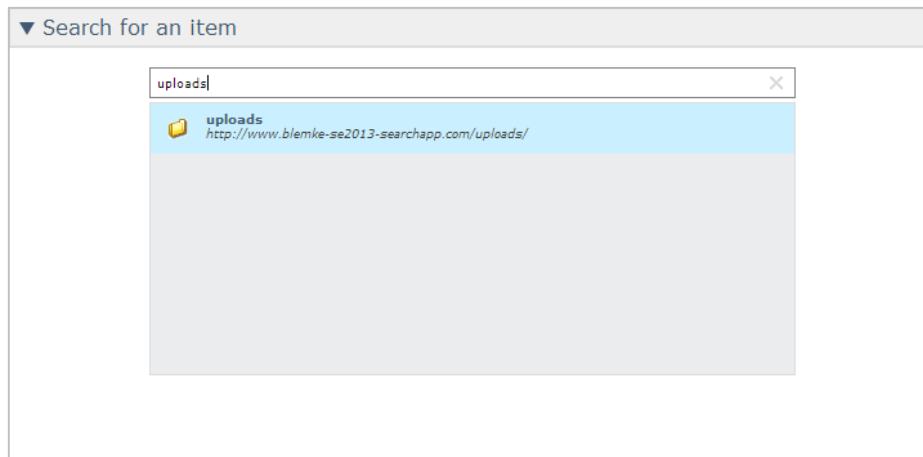


By default, the **Inclusions** tab is selected. Select the **Exclusions** tab. The **Search within** table at the bottom of the menu changes to the **Excluding from search** table:



To add an *Exclusion* by searching for an item:

1. Enter a search term in the Search Filtering search box.



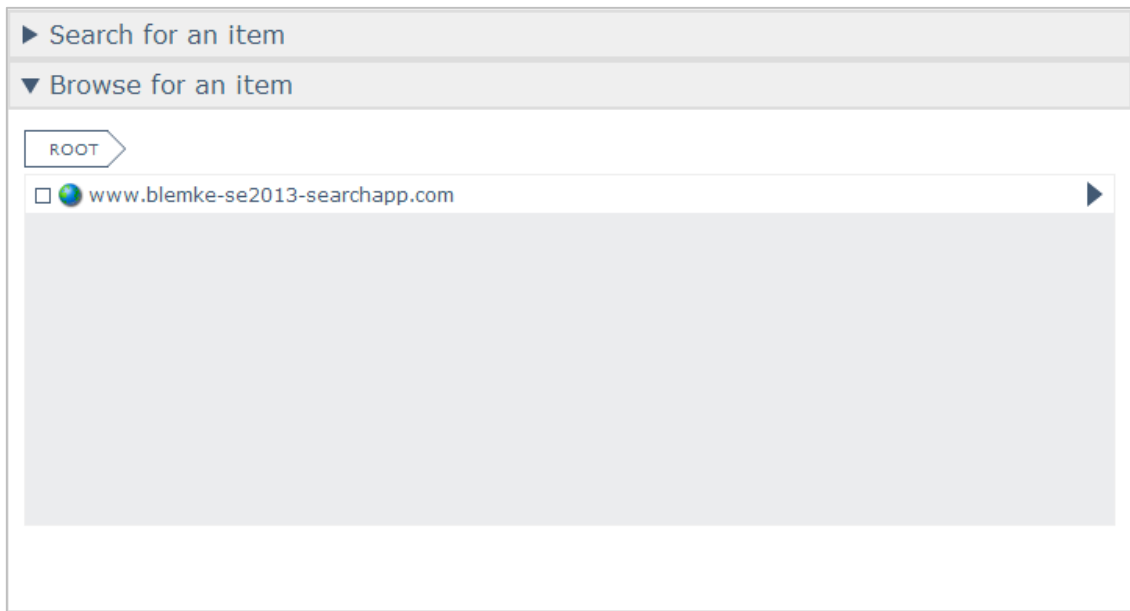
The search results populate below the search box dynamically.

2. Select the desired item.

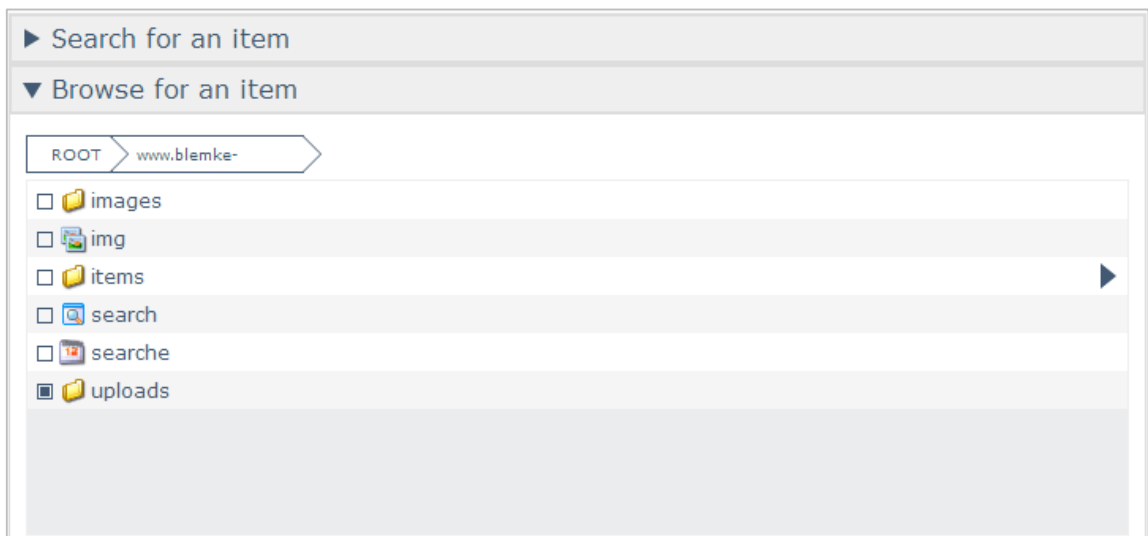
The selected item appears under the **Excluding from search** table below the item selector. The address of the item is listed under **Excluded Sites and Folders**. The item selected will no longer appear in search results in the **Exclusions** tab.

To add an *Exclusion* by browsing SiteExecutive for an item:

1. Expand the **Browse for an item** menu within the Search Filtering menu.
The **Search for an item** menu collapses, replaced by the **Browse for an item** menu:



Navigate to lower levels of the directory by clicking on an item that has an arrow next to it.




Items that have already been added as **Exclusions** will appear to be selected.

2. Check the box next to the item to be added as a filter.

The selected item appears under the **Excluding from search** table below the item selector. The address of the item is listed under **Excluded Sites and Folders**. It will remain selected in the **Browse for an item** table.

To remove an Exclusion:

1. In the exclusions table at the bottom of the Search Filtering menu, click the **Remove** icon next to the address of the item to be deleted:

Actions	Excluded Sites and Folders
	http://www.blemke-se2013-searchapp.com/img

A confirmation alert will display: "Remove this item from filter?"

2. Click **OK**.

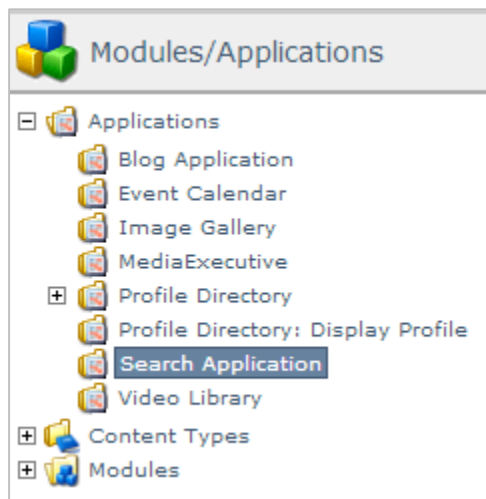
The selected item will be removed from the Search Application instance's exclusions list.

3.6 Custom Viewlets & Containers

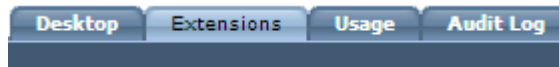
Custom viewlets and containers can be uploaded into SiteExecutive to customize how the Search Application can be utilized within SiteExecutive.

To add a custom Search Application viewlet:

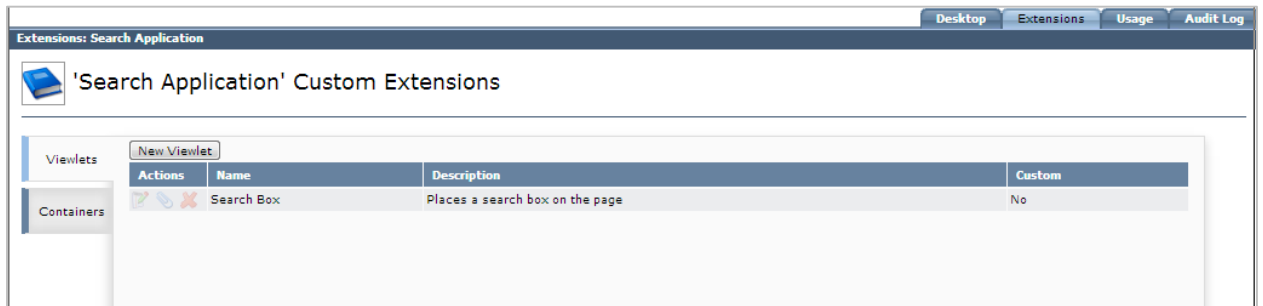
1. In the Site Tree, select **Modules/Applications**.
2. In the Modules/Applications menu, expand **Applications**.
3. Select **Search Application**.



4. Click on the **Extensions** tab.

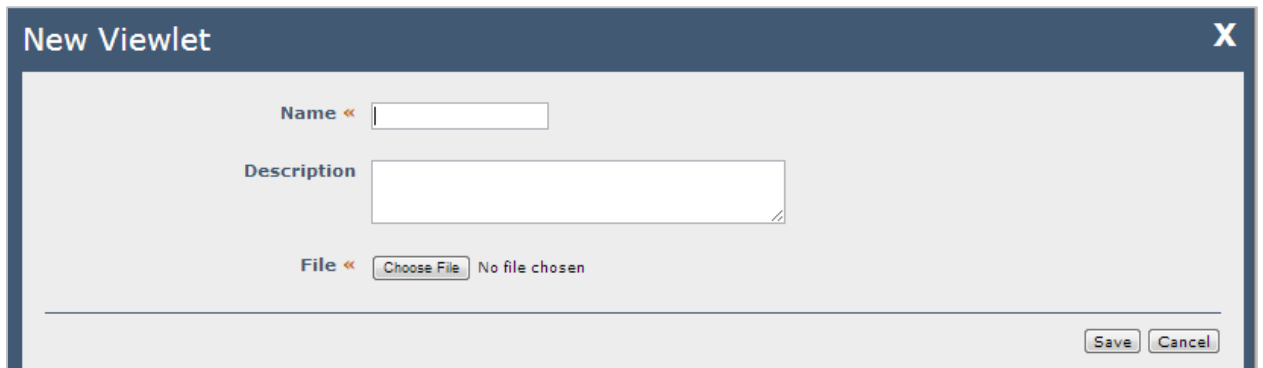


The Search Application Custom Extensions menu loads:



5. Click **New Viewlet**.

The New Viewlet dialog box appears:



The available options are:

Name << The name of the viewlet. This will display when selecting a viewlet for the Search Application. This field is required.

Description: A description of the viewlet.

File << The viewlet file to be uploaded into SiteExecutive. This field is required.

6. Fill in the information, choose the file to be uploaded, and click **Save**.

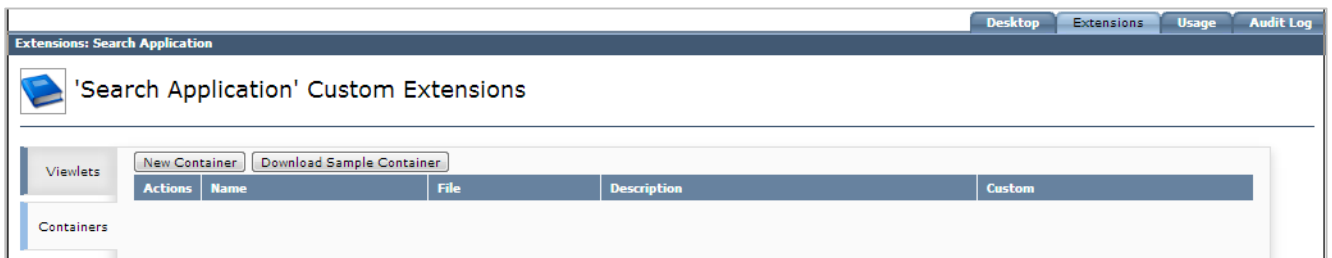
The custom viewlet is added to the viewlet table in the Extensions menu.

To add a custom Search Application container:

1. In the Site Tree, select **Modules/Applications**.

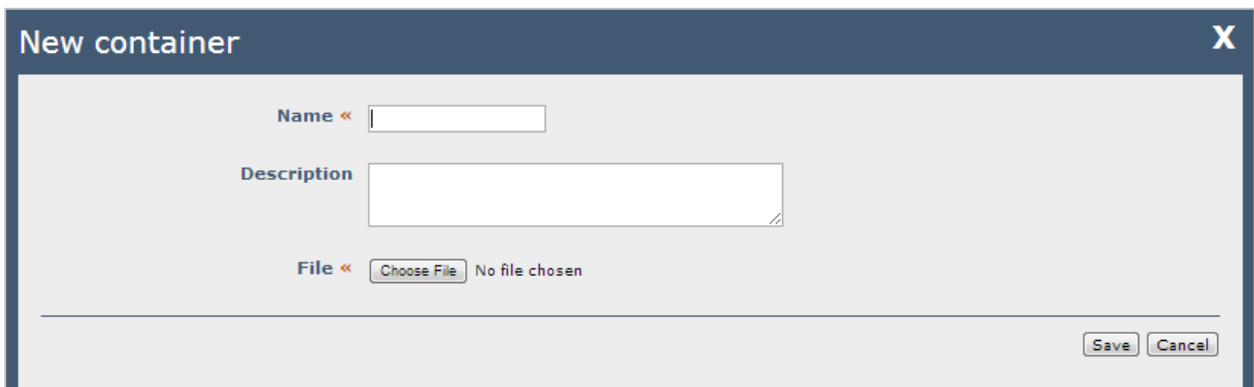
2. In the Modules/Applications menu, expand **Applications**.
3. Select **Search Application**.
4. Click on the **Extensions** tab.
5. Underneath **Viewlets** on the left, click the **Containers** tab.

The Containers tab loads. From this tab, clicking **Download Sample Container** downloads the ColdFusion code for a sample Search Application container.



6. Click **New Container**.

The New container dialog box appears:



The available options are:

Name « The name of the viewlet. This will display when selecting a viewlet for the Search Application. This field is required.

Description: A description of the viewlet.

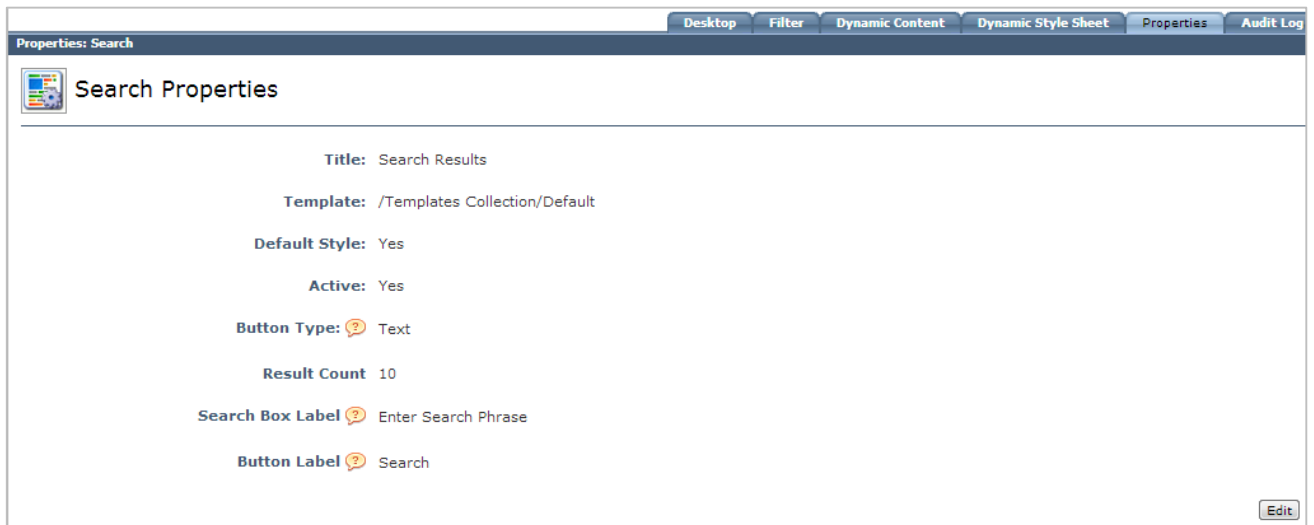
File « The viewlet file to be uploaded into SiteExecutive. This field is required.

7. Fill in the information, choose a file to be uploaded, and click **Save**.

The custom container is added to the container table in the Extensions menu.

3.7 Properties Tab

The Properties tab of a search application instance displays the options chosen when the application instance was deployed. This tab is editable so that the properties of the application instance can be changed at any time. The editable options in the Search Application instance's Properties tab are the same as those at deployment.



To edit a Search Application instance's properties:

1. Select the desired deployed Search Application instance in the Site Explorer.
2. Click on the **Properties** tab.
3. Click **Edit**.
4. Fill in the information and click **Save**.

The Search Application instance's properties are updated.

4. Styling the Search Application

NOTE: This section is intended for designers or users with advanced knowledge of Cascading Style Sheets (CSS). The Search Application is built to be legible and functional without the need for an external style sheet and without inline style definitions. Leveraging inline styles and stylesheets, however, will support rich presentation of the Search Application and search results.

Below is a list of the reserved classes that can be used to style the Search Application:

Class	Usage
.seSearchForm	Defines the form for entering search queries.
.seSearchBox	Defines the input box for the search form.
.seSearchButton	Defines the button to submit the search query in the search form.
.seSolr_resultBar	Defines the bar to display the number of search results and length of time taken to execute the search query.
.seSolr_title	Defines the title of a search result.
.seSolr_url	Defines the URL of a search result.
.seSolr_summary	Defines the summary text of a search result.

5. SiteExecutive 2013 Permissions

Available actions for users based on permission levels in SiteExecutive 2013 can be found on the Support Center:

http://support.siteexecutive.com/training/resources/permissions_2013_chart.html