Configuring search

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The configuration options in this section will help you fine-tune the behavior of search in your knowledge base.

Pagination

By default, the full search results page returns the top 20 articles ranked by relevance.

If you have a lot of content and the first 20 results might not give everything a reader needs, you can turn on pagination. This will still display the first 20 articles ranked by relevance, but the search results page will include page numbers and controls at the bottom so readers can navigate through search results.
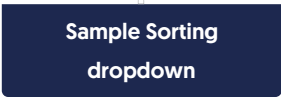
To enable pagination:

1. Go to **KB settings > Search and synonyms**. The **Search and synonyms** page opens to the **General settings** tab.

2. In the **Reader controls** section, under **Pagination and sorting**, check the box to **Allow readers to paginate through search results if more than 20 articles are found**.

3. Be sure to **Save** your changes.

Sorting

Full search results are sorted by relevance by default. The goal is to show the most relevant articles at the top of the results. While relevance can be a great default, there are times when your readers might want to find articles that were recently updated, or recently created. To allow this behavior, turn on **Sorting** in your search settings.

Once you turn on sorting, your knowledge base search results will display a sorting dropdown below the search bar. Readers will be able to sort the results in the following ways:

- **Relevance** *(default):* Sorted with most "relevant" articles at the top, as determined by the search relevance algorithm.
- **Popularity**: Sorted with articles with the most total views at the top.
- **Last updated**: Sorted with articles with the most recent modified date at the top.
- **Newest**: Sorted with articles with the most recent created date at the top.

	Sample Sorting dropdown	

To turn on sorting:

1. Go to **KB settings > Search and synonyms**. The **Search and synonyms** page opens to the **General settings** tab.

2. In the **Reader controls** section, under **Pagination and sorting,** check the box to **Allow readers to sort the search results by popularity, last updated date, or published date.**

3. Be sure to **Save** your changes.

> **Make it your own**
> You can change the "Sort by:" text label or the labels for the dropdown values using **Customize > Default text.** Refer to **Section breakdown: Search** for information on the available text strings.

Glossary term callouts

If you're using the **Glossary,** you might want glossary term definitions to display when someone searches for a glossary term anywhere in your knowledge base. We call this adding a **Glossary term callout** to your search results:

Sample glossary callout for glossary term definition of IdP

Here's how it works:
- If your reader searches a phrase that exactly matches a glossary term, the term and its definition are displayed in a box at the top of the search results.
- The glossary callout also includes a link to the specific letter in the Glossary that this term falls under.
- If you're using **Contextual Help Widget (2.0),** these glossary callouts are also displayed at the top of widget full search results:

Sample glossary term callout in the contextual help widget

To turn on this feature:

1. Go to **KB settings > Search and synonyms.** (Or, from the **Glossary** page, select **Edit in settings** next to "Definitions at the top of the search results.") The **Search and synonyms** page opens to the **General settings** tab.

2. In the **Search page display** section, under **Glossary callouts,** check the box to "Display the glossary definition when a reader searches for a glossary term."

3. Be sure to **Save** your changes.

> **Make it your own**
> Want to change the look and feel of that callout box? Follow the steps in **Style the glossary snippet search results** to get what you want. Don't like the word "Glossary"? Use the **Search section** of the **Customize Default text** to change the text that appears there!

Add the glossary page to your search results

By default, your glossary page doesn't show up in search results. This means that if a reader types "glossary" in search, the Glossary page won't be in their list of search results automatically. But don't worry--KnowledgeOwl has a setting for this so a link to the Glossary page displays in a box above all other search results:

Sample glossary page callout

Not for use in the Contextual Help Widget
Unlike the Glossary term callouts functionality, this result will NOT display in Contextual Help Widget search results.

To turn on this setting:

1. Go to **KB settings > Search and synonyms.** (Or, from the **Glossary** page, select **Edit in settings** next to "Definitions at the top of the search results.")

2. In the **Search page display** section, under **Glossary callouts,** check the box to "Display a link to the full glossary page when a reader searches for "glossary."

3. Be sure to **Save** your settings.

Make it your own
Want to change the look and feel of that callout box? Follow the steps in Style the glossary snippet search results to get what you want. Don't like the word "Glossary" or want to add more explanation to the box? Use the Search section of the Customize Default text to change the text that appears there!
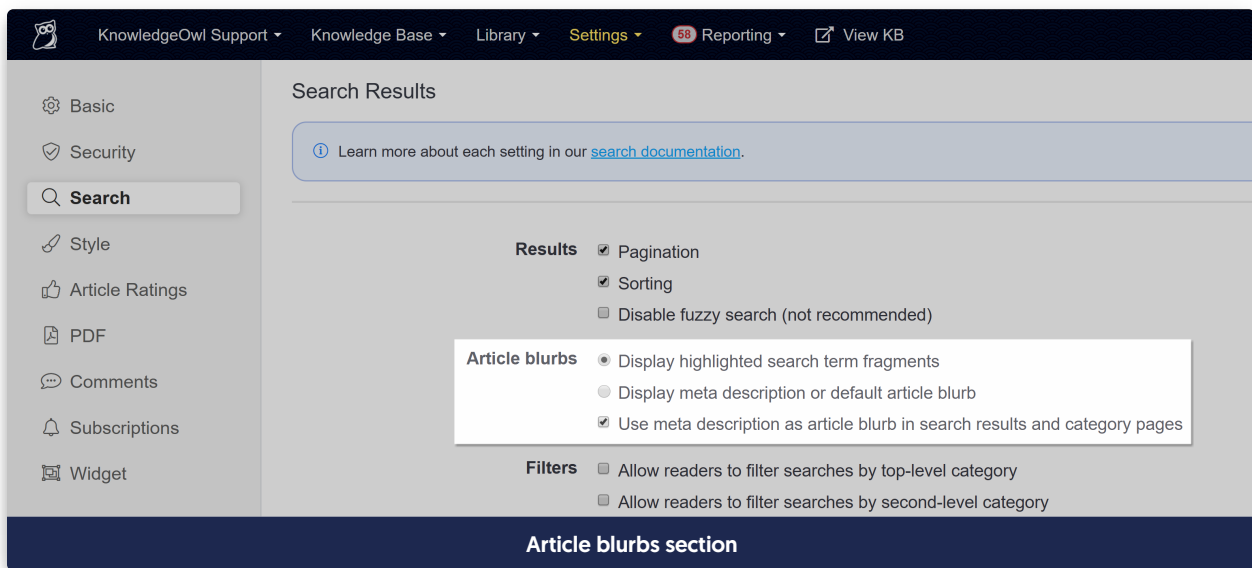
Article blurbs

Article blurbs are the summary information displayed under search results. By default, we display highlighted search term fragments, but you can override this to display the meta description or default article blurb instead.

Highlighted search term fragments
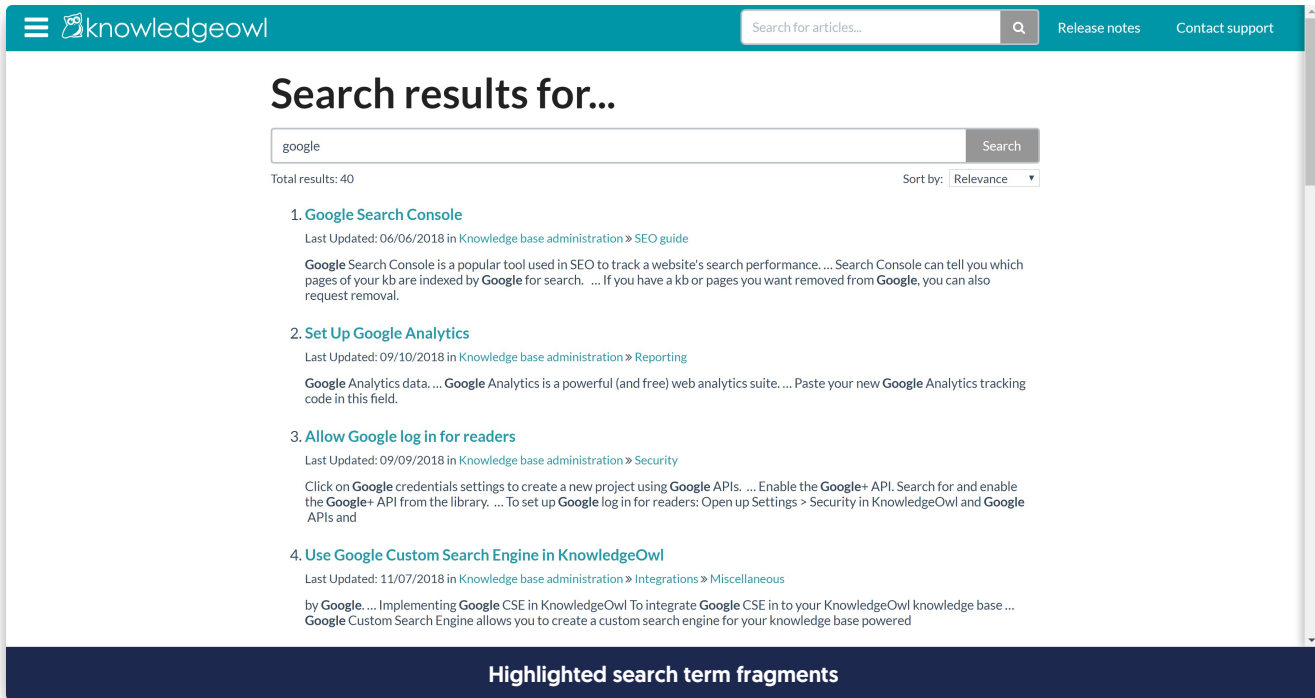
To change your search result article blurbs:

1. Go to **Settings > Search.**

2. Make a selection in the **Article Blurbs** section:

Article blurbs section

3. Save.

What does each setting do?

- **Display highlighted search term fragments (default):** This will display dynamic fragments of text from the article with the search term highlighted.
- **Display meta description or default article blurb:** This will display the meta description for the article, if one

exists; otherwise it will display the first 150-ish characters from the article, including any code or HTML.

- **Use meta description as article blurb in search results and category pages (recommended):** When checked, this will force the search results to display the meta description (even if it's empty). It will also display the article's meta description on any category landing pages, instead of using the first 150-ish characters of the article body. We strongly recommend keeping this box checked regardless of the display option you've selected above it.

Highlighted search terms vs. Meta description

We default article blurbs to display highlighted search term fragments for a few reasons:
- It's consistent with how Google and other search engines display results
- It provides context for the search result, and that can help readers get to the information they want faster
- Showing search terms in context can help readers figure out other search terms that might help them find what they need better

For many customers, this is just generally an intuitive search setting.

However, there are some cases where this doesn't make sense. If your articles frequently use the same word repeatedly in the same sentence, the fragment blurbs can almost seem noisy or cluttered. You might also want to use meta descriptions when you have a lot of similarly-structured articles and you want to set a clear, succinct meta description to consistently appear in search results.

There is no hard and fast rule about which setting is more ideal: it really depends on how your knowledge base is set up and how readers use it. When readers might be most heavily searching product codes or serial numbers and these fields appear in tables or long lists in articles, meta description might be a much better setting. But where readers are coming in to search for topics or subjects, often the search term fragments are a much better setting.

The good news is that changing this setting instantly takes effect and requires no reindexing for search, so you can very easily toggle it one way and then go back to the other if it isn't working for you.
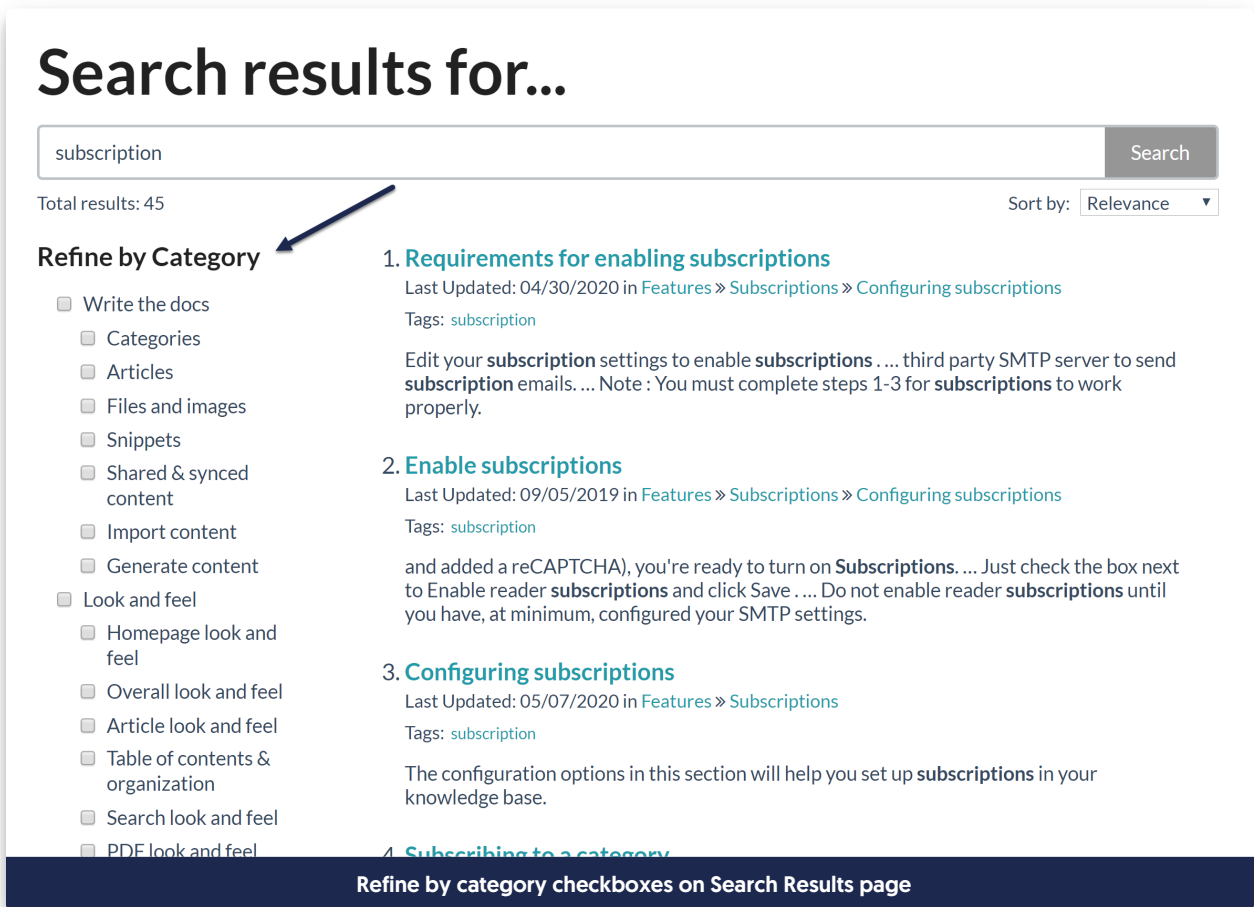
Filter search by categories

You can allow your readers to filter search results by category. You can choose to allow filtering by the top-level categories or by both top-level and second-level categories.

When enabled, this option will:

1. Add a Refine dropdown menu to your search bars. This allows your readers to select a category before they search.

Refine by category dropdowns on search bar
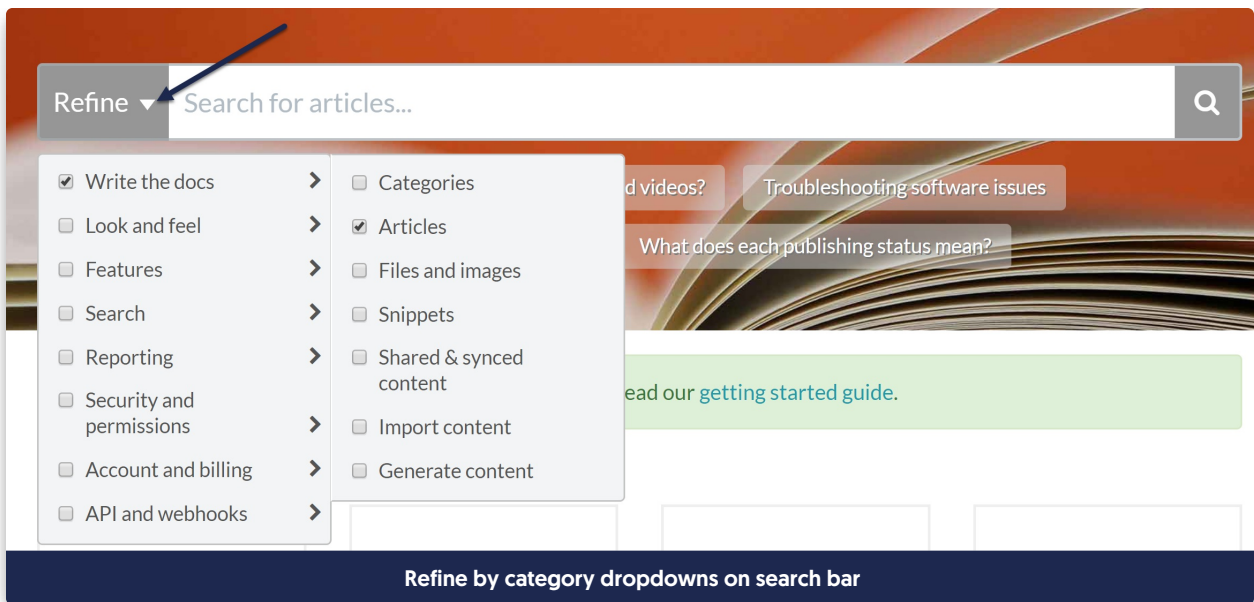
2. **Add Refine by Category checkboxes to your search results page. These allow your readers to refine by category from the search results page after they search.**

Refine by category checkboxes on Search Results page

To add these refine by category options for top-level and/or second-level categories:

1. Go to **Settings > Search.**

2. In the **Filters** section, check the boxes next to top-level or top-level + second-level categories to add the refine options for those two levels, respectively.

Search Results

ⓘ Learn more about each setting in our [search documentation](#).

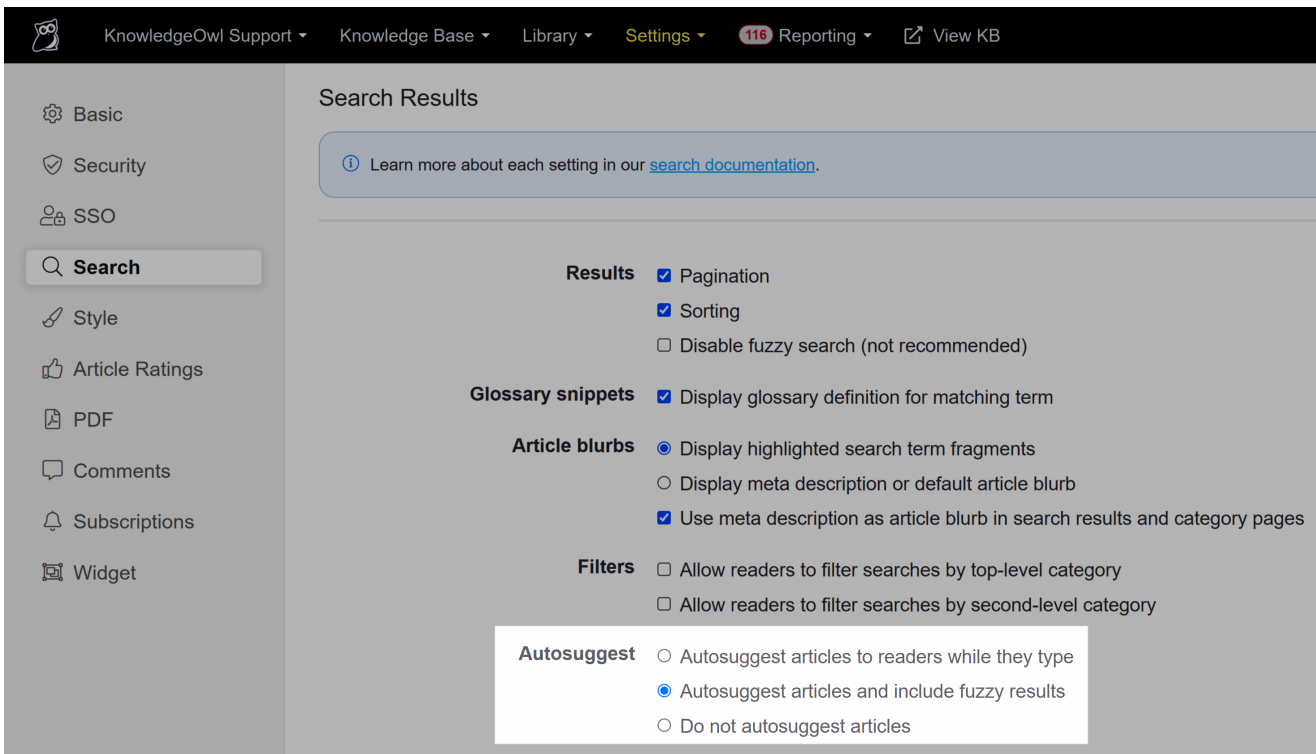|	
Results	☑ Pagination
	☑ Sorting
	☐ Disable fuzzy search (not recommended)
Article blurbs	◉ Display highlighted search term fragments
	◯ Display meta description or default article blurb
	☑ Use meta description as article blurb in search results and category pages
Filters	☑ Allow readers to filter searches by top-level category
	☑ Allow readers to filter searches by second-level category
Autosuggest	◯ Autosuggest articles to readers while they type
	◉ Autosuggest articles and include fuzzy results
	◯ Do not autosuggest articles

3. **Save.**

Autosuggest

Autosuggest controls what kind of search is performed as readers begin typing in the search box, before they hit enter or click the search icon to run a full search. By default, we set autosuggest to return to readers while they type. When either type of autosuggest is enabled, readers will see up to 10 relevant results in a dropdown below the search bar.

To change autosuggest settings, go to **Settings > Search.**

Search Results

ⓘ Learn more about each setting in our search documentation.

Results	☑ Pagination
	☑ Sorting
	☐ Disable fuzzy search (not recommended)
Glossary snippets	☑ Display glossary definition for matching term
Article blurbs	⦿ Display highlighted search term fragments
	○ Display meta description or default article blurb
	☑ Use meta description as article blurb in search results and category pages
Filters	☐ Allow readers to filter searches by top-level category
	☐ Allow readers to filter searches by second-level category
Autosuggest	○ Autosuggest articles to readers while they type
	⦿ Autosuggest articles and include fuzzy results
	○ Do not autosuggest articles

There are three autosuggestion settings:

- **Autosuggest articles to readers while they type: This setting will autosuggest articles as readers type. It is not typo-tolerant. If multiple words separated by spaces are used, it will match and return results on the words independently. For example, if I type "configuring", I will see autosuggestions that contain "configuring". If I type "configuring search", I will get autosuggestions containing either "configuring" or "search":**

Sample gif showing autosuggest search. Hover to play.
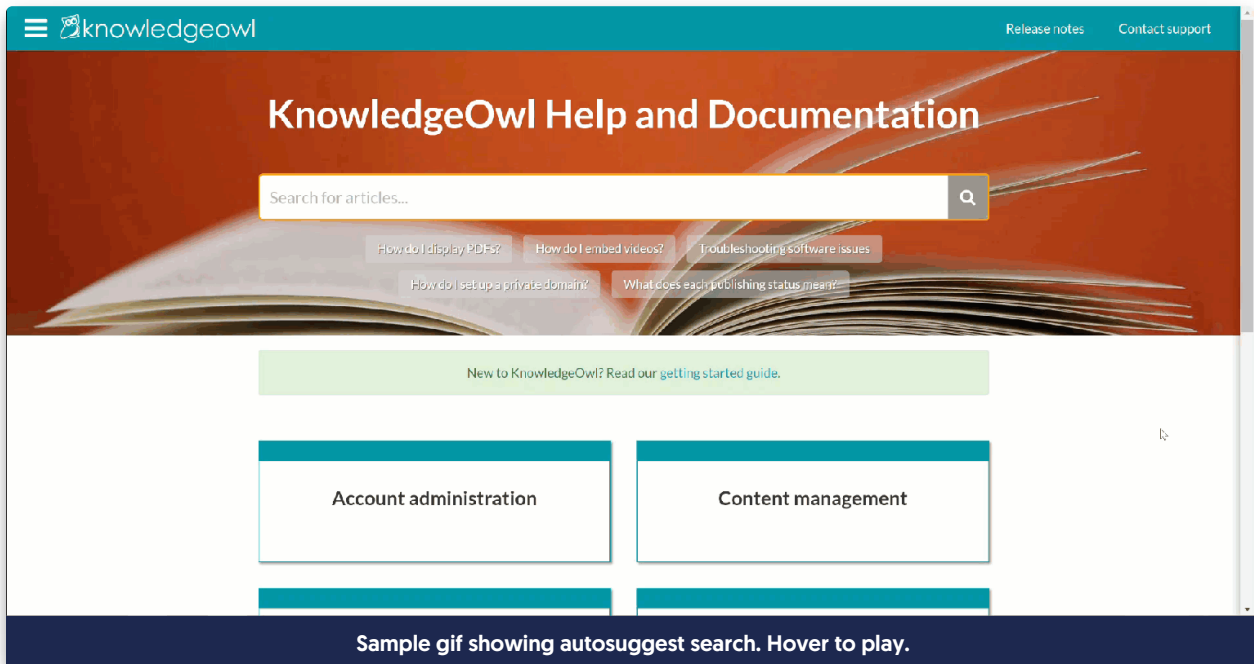
- **Autosuggest articles and include fuzzy results: This setting will autosuggest articles as readers type, and it will also do "fuzzy" matching. Think of this like typo tolerance: searching for "remainder" might bring up**

articles with "reminder", searching for "good" may bring up articles with "Google". With fuzzy results turned on, the more precise match should bubble to the top of the autosuggestions:

Sample gif showing autosuggest search with fuzzy results. Hover to play.
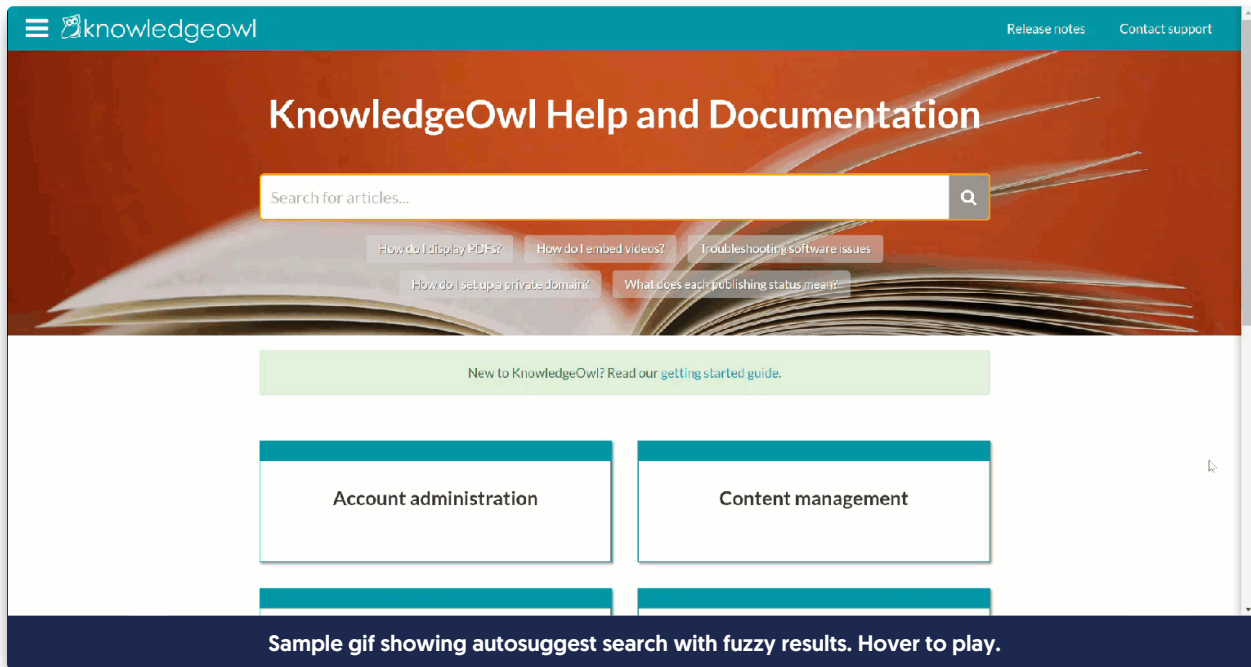
> We recommend this setting with one caveat: for some customers with key search terms that are very close in spelling, it can increase the number of search results you get. So just be sure you test it to be sure it's helpful rather than noisy.

- **Do not autosuggest articles:** Use this setting if you do not want any autosuggestions to appear as readers type. Readers will need to hit Enter or click the search icon to complete a full search and see any results.

For more details on what happens under the covers in autosuggest, see **Autosuggest search**.

Shared content articles

When you create an article using the option to **Share content from an existing article**, it is considered a "child" article (the original is considered the "parent".) By default, child articles are excluded from search.

To enable child articles to show up in search:

1. Go to **Settings > Search.**

2. Next to **Shared content articles,** uncheck the box next to **Prevent child articles from being searched.**

Search Results

ℹ️ Learn more about each setting in our search documentation.

Results	☑ Pagination
	☑ Sorting
	☐ Disable fuzzy search (not recommended)
Glossary snippets	☑ Display glossary definition for matching term
Article blurbs	⦿ Display highlighted search term fragments
	○ Display meta description or default article blurb
	☑ Use meta description as article blurb in search results and category pages
Filters	☐ Allow readers to filter searches by top-level category
	☐ Allow readers to filter searches by second-level category
Autosuggest	○ Autosuggest articles to readers while they type
	⦿ Autosuggest articles and include fuzzy results
	○ Do not autosuggest articles
Shared content articles	☐ Prevent child articles from being searched
Exclude category	No category selected ⚙
Index large PDFs	☑ Index the content of PDFs included in articles that are larger than 100 pages
	Enabling this setting could lead to poor / skewed search results due to the amount of words inside of large PDFs

Prevent child articles from being searched checkbox

3. **Save.**

Exclude category

Have you ever wished you could exclude an entire category's contents from search, all at once? Maybe you have a category where you include content specific to particular customers, where you provide them a URL and otherwise hide that category from search and navigation. Or, you might have a category you use for Internal Reviews, where you publish things that are in-progress to get feedback from subject matter experts, but you don't ever want your general readership to find those resources.

Search result exclusions are usually set in individual articles. They don't get passed from the category to the articles.

So, for example, if I have a category called Enterprise Resources, and it contains subcategories for each of my enterprise customers, I'd have to manually set each individual article to be excluded from search:

- **Enterprise Resources**

- Customer 1
  - Article 1 (exclude from search)
  - Article 2 (exclude from search)
- Customer 2
  - Article 3 (exclude from search)
  - Article 4 (exclude from search)

Excluding content from search this way can be inconsistent, since it depends on your content creators to remember to check the box in each article or for you to create a reader group restriction.

In the Search Settings, you can fully exclude a single category *and all of its content* from search results. When you use this option, it automatically excludes from search:

- All articles directly within the category
- The main category (if it's topic display or custom content, which are indexed for search)
- All topic display or custom content subcategories
- All articles in the category's subcategories

So, in the above example, if I set my Customer 1 category to be hidden from search, Article 1 and Article 2 would be automatically hidden, even if I didn't check that option in the articles themselves.

If I set Enterprise Resources category to be hidden from search, all four articles would be hidden from search, as would any future articles created for additional customers.

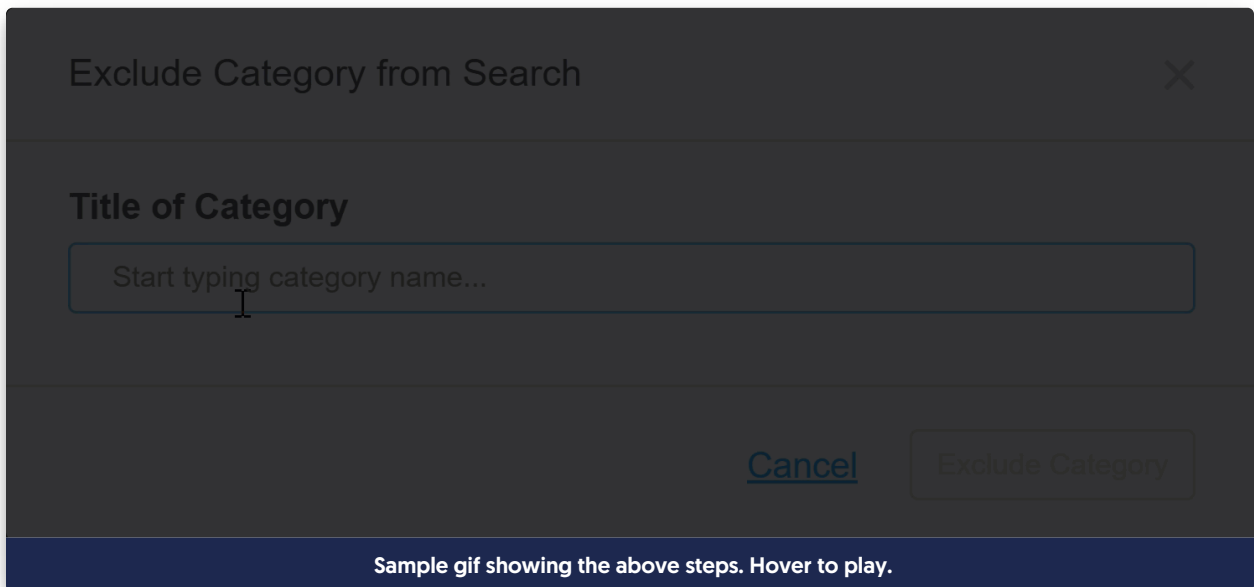## Exclude a full category from search

To exclude a category and all its content from search:

1. Go to **Settings > Search.**

2. Next to **Excluded category,** select the gear icon:
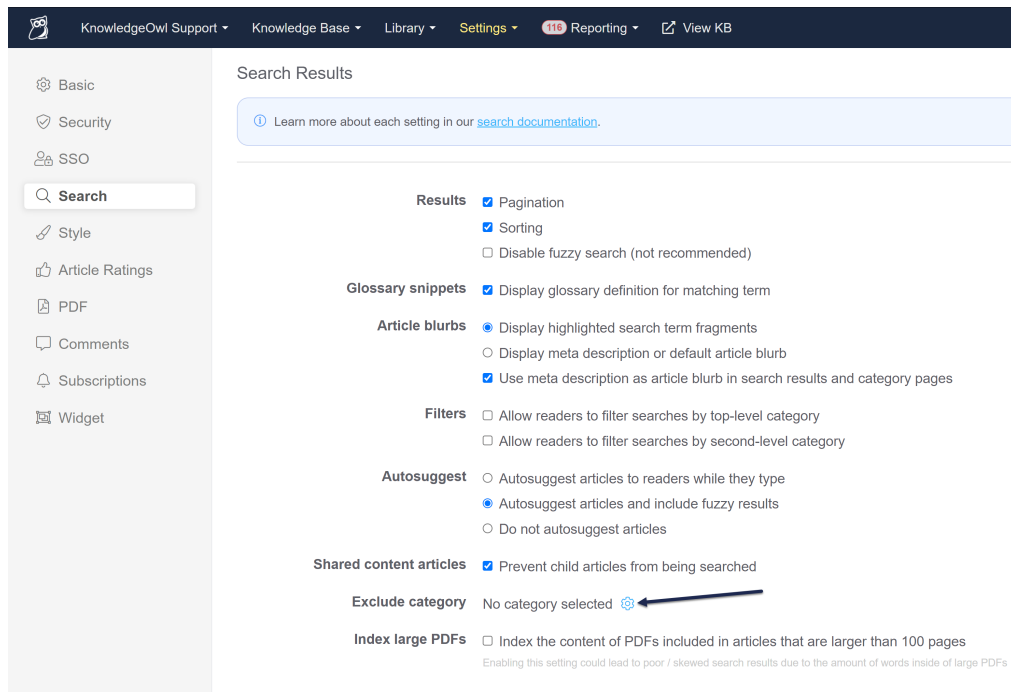
3. In the pop-up that appears, start typing the name of the category you want to exclude. You'll get an autosuggested list as you type. Click the category you want to select.

4. Then select **Exclude Category**.

Exclude Category from Search

Title of Category

Start typing category name...

Cancel   Exclude Category

Sample gif showing the above steps. Hover to play.

5. Once you've made your selection, click **Save** to save your changes.

All of the content in that category is now excluded from search.

Index large PDFs

The search index will automatically scrape and index the contents of PDFs in articles. By default, we only index the content of PDFs under 100 pages long.

If you have PDFs longer than 100 pages and you'd like them to be indexed for search, you'll need to change this setting.

> ⚠️ **Enabling this setting could lead to poor / skewed search results due to the amount of words inside of large PDFs. We recommend only using it if absolutely necessary, and testing some of your common search terms' results before and after the change.**

To enable indexing of PDFs longer than 100 pages:

1. Go to **Settings > Search.**

2. In the **Index large PDFs** section, check the box next to **Index the content of PDFs included in articles that are larger than 100 pages.**

Index large PDFs checkbox

3. **Save.**

Search weights

Search weights determine the relevance each article field has in search. All fields start with a weight of 1 and have equal relevance in search. You can view your knowledge base's current relevance search weights by going to **Settings > Search** and looking in the **Search Weights** section.

Search Results

ⓘ Learn more about each setting in our search documentation.

Results	☑ Pagination
	☑ Sorting
	☐ Disable fuzzy search (not recommended)
Glossary snippets	☑ Display glossary definition for matching term
Article blurbs	⦿ Display highlighted search term fragments
	○ Display meta description or default article blurb
	☑ Use meta description as article blurb in search results and category pages
Filters	☐ Allow readers to filter searches by top-level category
	☐ Allow readers to filter searches by second-level category
Autosuggest	○ Autosuggest articles to readers while they type
	⦿ Autosuggest articles and include fuzzy results
	○ Do not autosuggest articles
Shared content articles	☑ Prevent child articles from being searched
Exclude category	No category selected ⚙
Index large PDFs	☑ Index the content of PDFs included in articles that are larger than 100 pages
	Enabling this setting could lead to poor / skewed search results due to the amount of words inside of large PDFs

Search Weights

ⓘ Search weights determine the relevance each field has in search. Increasing the weight of one field relative to the others will boost it in sear

Title	1 ▾
Permalink	1 ▾
Body	1 ▾
PDFs	1 ▾
Meta description	1 ▾
Search phrases	30 ▾

Save

Search Testing

Search Weights

The following fields are indexed for search:

- **Title**
- **Permalink**
- **Body**

- **PDFs**
- **Meta description**
- **Search phrases**

> Tags do not impact search weights or relevancy scores.

Search weights allow you to boost individual search fields. The weight represents how strong of a preference you'd like to give it.

For example, say that you set article titles to a weight of 10 and keep the other fields at 1. The search engine will still try and determine the best match across all fields using relevancy scoring algorithms. If the search finds a similar match in the title of one article and the body of another, the search weight will be used to bump up the score of the article with the matching title and it will rank higher.

See Dig into your weights for more information.

Search testing

Search testing

Once you've made changes to your search weights, use Search Testing to quickly and easily test changes to search weights to see if they're producing the results you want/expect. The Search Testing section is just below the Search Weights section on Settings > Search.

Search Testing

ⓘ Preview changes to search weights before you update them. Test results will provide the search score for up to 200 articles.

| Test search phrase | 🔍 |

Search results

Type a search term into the test search phrase field and hit enter (or click the magnifying glass). This will give you the search results and relevance score for up to 200 articles.

To see how a change to search weights will affect your results, adjust the weights and click the magnifying glass to refresh the search results. You can see how changes will affect the ranking and scoring of results.

You can also click on an article to open the editor to view and make adjustments to the searchable fields. Once you've made changes, search again to see how it affects the search results.

To improve the ranking of an article in search for a given search term, you can optimize the article by making sure the search term appears in the searchable fields. For example, if you want to be able to significantly boost an article for a search term, you can add it as a search phrase and boost the search weight of search phrases.

When you are happy with your weighting, click save to make the changes live. Adjusting search weights does not require a reindex.

Primary search language

Primary search language

The primary search language determines how we perform the stemming to reduce the words to their root form. You can set this in **Settings > Search** in the Language section:

Language

ⓘ The primary search language determines how we perform the stemming to reduce words to their root form. Some languages apply specific transformations in order to make words from that language more searchable. The stemming rules for English are different from those for German, French, and so on.

Primary search language   English   ⌄

If your desired language is not listed, English search is recommended.

Why does primary search language matter? The **stemming** rules for English are different from those for German, French, and so on. For example...

- In English, possessive "apostrophe s" is removed so that "Pete's" becomes "Pete".
- In French, elisions are removed so that "qu'est" becomes "est".
- In German, characters are normalized so that "hässlich" becomes "hasslich".

Changing your primary search language will **require a search reindex**.

Our search supports many of the world's most common languages:
- **Arabic**
- **Armenian**
- **Basque**
- **Brazilian**
- **Bulgarian**
- **Catalan**
- **Czech**
- **Danish**
- **Dutch**
- **English (default)**
- **Finnish**
- **French**
- **Galician**
- **German**

- **Greek**
- **Hindi**
- **Hungarian**
- **Indonesian**
- **Irish**
- **Italian**
- **Kurdish**
- **Latvian**
- **Lithuanian**
- **Norwegian (Bokmål)**
- **Norwegian (Nynorsk)**
- **Portuguese**
- **Romanian**
- **Russian**
- **Spanish**
- **Swedish**
- **Turkish**

> **If your language isn't listed, we recommend using English (the default).**