



Hewlett Packard
Enterprise

HPE IDOL Search Optimizer

Software Version: 11.1.1

User Guide

Document Release Date: August 2016

Software Release Date: August 2016

Legal Notices

Warranty

The only warranties for Hewlett Packard Enterprise Development LP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HPE shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HPE required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Copyright Notice

© Copyright 2015-2016 Hewlett Packard Enterprise Development LP

Trademark Notices

Adobe™ is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

UNIX® is a registered trademark of The Open Group.

This product includes an interface of the 'zlib' general purpose compression library, which is Copyright © 1995-2002 Jean-loup Gailly and Mark Adler.

Documentation Updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

To check for recent software updates, go to <https://downloads.autonomy.com/productDownloads.jsp>.

To verify that you are using the most recent edition of a document, go to <https://softwaresupport.hpe.com/group/softwaresupport/search-result?doctype=online help>.

This site requires that you register for an HPE Passport and sign in. To register for an HPE Passport ID, go to <https://hpp12.passport.hpe.com/hppcf/login.do>.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HPE sales representative for details.

Support

Visit the HPE Software Support Online web site at <https://softwaresupport.hpe.com>.

This web site provides contact information and details about the products, services, and support that HPE Software offers.

HPE Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support web site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Access product documentation
- Manage support contracts
- Look up HPE support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HPE Passport user and sign in. Many also require a support contract.

To register for an HPE Passport ID, go to <https://hpp12.passport.hpe.com/hppcf/login.do>.

To find more information about access levels, go to <https://softwaresupport.hpe.com/web/softwaresupport/access-levels>.

To check for recent software updates, go to <https://downloads.autonomy.com/productDownloads.jsp>.

About this PDF Version of Online Help

This document is a PDF version of the online help. This PDF file is provided so you can easily print multiple topics from the help information or read the online help in PDF format. Because this content was originally created to be viewed as online help in a web browser, some topics may not be formatted properly. Some interactive topics may not be present in this PDF version. Those topics can be successfully printed from within the online help.

Contents

Chapter 1: Introduction	7
HPE IDOL Search Optimizer	7
HPE's IDOL Platform	8
HPE IDOL Search Optimizer Structure	8
Components	9
Edit HPE IDOL Search Optimizer Configuration Settings	9
View Notifications	10
Edit User Information	11
About Page	12
 Chapter 2: Overview Page	 13
Monitor Number of Searches	13
View Top Search Terms	13
View Zero Hit Terms	13
View Top and Bottom Promotions	13
 Chapter 3: Promotions	 15
Introduction to Promotions	15
Promotions Page	15
Filter the Promotions List	16
Set Up New Promotions	16
Edit Promotions	18
Add Field Text Restrictions	20
 Chapter 4: Search	 23
Work With Search Results	23
Filter Results by Database	23
Filter Results by Date	23
Filter Results by Parametric Values	23
View Related Concepts	24
Use Field Text	24
 Chapter 5: Keywords	 25
Synonyms	25

Blacklists 26

Keywords Page 26

Send Documentation Feedback 29

Chapter 1: Introduction

This section gives an overview of HPE IDOL Search Optimizer and its structure.

• HPE IDOL Search Optimizer	7
• HPE's IDOL Platform	8
• HPE IDOL Search Optimizer Structure	8
• Components	9
• Edit HPE IDOL Search Optimizer Configuration Settings	9
• View Notifications	10
• Edit User Information	11
• About Page	12

HPE IDOL Search Optimizer

HPE IDOL Search Optimizer allows you to manage data indexed in HPE IDOL servers to optimize the search process for your end users. You can create and modify promotions or keywords to predefine the results that are returned to users, and control how users view them. You can also view statistical information to help you to refine the rules that you created, and make them more effective.

For information on how to install and access HPE IDOL Search Optimizer, see the *HPE IDOL Search Optimizer Installation Guide*.

The HPE IDOL Search Optimizer interface allows you to carry out the following tasks:

- Display a document or a set of documents to the user based on specified criteria (see [Promotions, on page 15](#)). You can also pin documents to a fixed position in the results list.
- Set up and manage a list of terms that are automatically excluded from any query, or create a list of synonyms so that when users search for particular words, the results also include synonyms of their search terms (see [Keywords, on page 25](#)).
- View statistics about the business rules you defined, for example, top search terms or zero hits terms (see [Overview Page, on page 13](#)).
- Test your search results to help you to understand why a search returns a particular set of results. To view results for a search, type your search terms into the search box at the top of the page, then press ENTER.

Tip: You can also view the results for the top 10 most popular search terms from the Overview page.

- View the full text of a document in a new window in the HPE IDOL Search Optimizer interface by clicking the document title or the icon next to the document. Alternatively, you can click a link with the wheel button on your mouse to open a document in a new tab in your web browser.

HPE's IDOL Platform

At the core of HPE IDOL Search Optimizer is HPE's *Intelligent Data Operating Layer* (HPE IDOL).

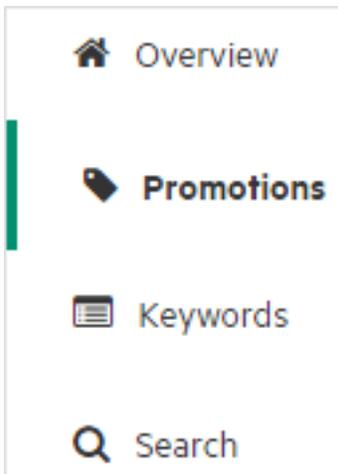
HPE IDOL gathers and processes unstructured, semi-structured, and structured information in any format from multiple repositories using HPE IDOL connectors and a global relational index. It can automatically form a contextual understanding of the information in real time, linking disparate data sources together based on the concepts contained within them. For example, HPE IDOL can automatically link concepts contained in an e-mail message to a recorded phone conversation, that can be associated with a stock trade. This information is then imported into a format that is easily searchable, adding advanced retrieval, collaboration, and personalization to an application that integrates the technology.

For more information on HPE IDOL, see the *HPE IDOL Getting Started Guide*.

HPE IDOL Search Optimizer Structure

- [Components](#) 9
- [Edit HPE IDOL Search Optimizer Configuration Settings](#) 9
- [View Notifications](#) 10
- [Edit User Information](#) 11
- [About Page](#) 12

HPE IDOL Search Optimizer consists of several pages, which you open by clicking the page titles along the left of the window.



Click  to collapse the page titles and increase the size of the main content display.

Components

HPE IDOL Search Optimizer uses the following HPE IDOL components to manage, store, and apply the rules that you define:

- **HPE Community.** The HPE Community component manages authentication and users. HPE IDOL Search Optimizer stores information about users and administrators in HPE Community.
For information about how to set up and configure HPE Community, see the *HPE IDOL Server Administration Guide* and the *HPE IDOL Server Reference*.
- **HPE Content.** The HPE Content server indexes and stores the documents that your users search. HPE IDOL Search Optimizer applies the rules that you create to documents in this HPE Content server, and the searches that your users run against this server.
For information about how to set up and configure HPE Content, see the *HPE IDOL Server Administration Guide* and the *HPE IDOL Server Reference*.
- **HPE View.** HPE IDOL Search Optimizer uses the HPE IDOL View Server to enable near-native document viewing.
For information about how to set up and configure HPE View Server, see the *HPE IDOL Server Administration Guide* and the *HPE IDOL Server Reference*.
- **HPE Query Manipulation Server.** The HPE Query Manipulation Server (QMS) applies the rules that you create and manage in HPE IDOL Search Optimizer. When a user runs a search, HPE QMS searches for appropriate rules in the HPE QMS Agentstore, and applies them to the query or the results that return. The user interface also allows you to create HPE QMS rules.
For information about how to set up and configure HPE QMS, see the *HPE QMS Administration Guide*, and the *HPE QMS Reference*.
- **HPE QMS Agentstore.** The Agentstore that HPE QMS uses to store the rules that you create in HPE IDOL Search Optimizer.
For information about HPE QMS Agentstore, see the *HPE QMS Administration Guide*.
- **HPE IDOL Statistics Server.** The HPE IDOL Statistics Server stores information about the queries and terms run in your HPE IDOL server.
For information about how to set up and configure HPE Statistics Server, see the *HPE QMS Administration Guide*.

Related Topics

- [Edit HPE IDOL Search Optimizer Configuration Settings, below](#)

Edit HPE IDOL Search Optimizer Configuration Settings

The first time that you log on to HPE IDOL Search Optimizer, the Settings Wizard guides you through the setup process. In subsequent sessions, click , then click **Settings** to use the **Settings** page to edit the HPE IDOL Search Optimizer configuration file.

The Settings page allows you to:

- Specify the connection type, host, port, and logon type information for the HPE Community server that handles HPE IDOL Search Optimizer user authentication.
- Specify the connection type, host, and port information for the HPE IDOL Content server where your content is indexed. You can also specify whether you have a **Standard** setup (where you have a single HPE Content component and send all commands directly to that component), or a **Distributed** setup (where you have multiple HPE Content components and send commands to an HPE Distributed Action Handler (DAH), which distributes them appropriately).
- Specify the connection type, host, and port information for the HPE View server to use to view your documents in a web browser. You can also specify the reference field to use for each document.
- Specify the connection type, host, and port information for the HPE Query Manipulation Server that you want to manage using HPE IDOL Search Optimizer.

You can also specify whether to use index mode or dictionary mode if you want to use HPE QMS to provide query completion. For more information, see the *HPE QMS Administration Guide*, and the *HPE QMS Reference*.

- Specify the connection type, host, and port information for the HPE Agentstore that HPE Query Manipulation Server uses for data storage. You can also specify whether you have a **Standard** setup (where you have a single HPE Agentstore component and send all commands directly to that component), or a **Distributed** setup (where you have multiple HPE Agentstore components and send commands to an HPE DAH, which distributes them appropriately).
- Specify the connection type, host, and port information for the HPE IDOL Statistics Server.
- Test your server connections.

HPE IDOL Search Optimizer validates any changes to your server settings, and prompts you to correct any information that is not valid before you can save your settings.

Related Topics

- [Components, on the previous page](#)

View Notifications

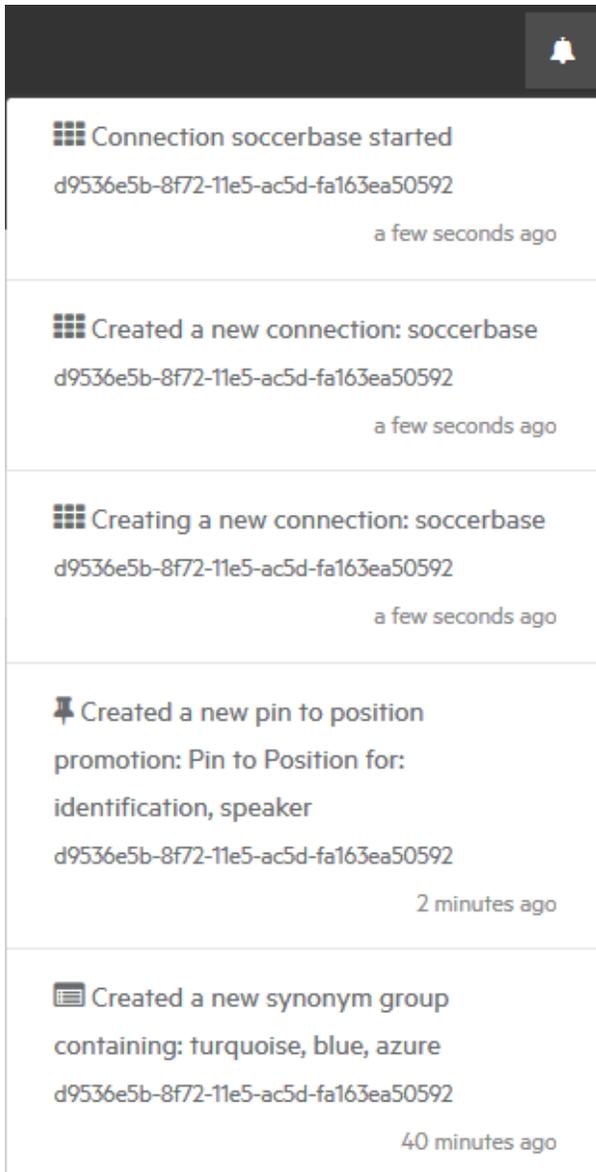
HPE IDOL Search Optimizer records details of any actions that users take during a session (for example, creating a new promotion, or adding terms to the blacklist). You can view details of the last 5 actions in the Notifications list.



To view notifications, click  in the toolbar at the top of the page. The number of unread notifications, if any, is highlighted.

The Notifications list shows the following information for each action:

- The action taken.
- The name of the user who carried out the action.
- The time that the action was completed.



Note: HPE IDOL Search Optimizer does not store notifications across sessions; the Notifications list is cleared if you log out.

Edit User Information

The **User Management** page shows details for all the users in your HPE Community server. You can use this page to create new user profiles, edit existing user profiles, and assign application roles to users. To open the **User Management** page, click , then click **Users**.

See the *HPE IDOL Search Optimizer Installation Guide* for more details on user roles and privileges.

About Page

For more information about HPE IDOL Search Optimizer, click , then click **About**. On the **About** page, you can view copyright, version, and licensing information for HPE IDOL Search Optimizer.

Chapter 2: Overview Page

The Overview page provides statistics about the rules that you set up in HPE IDOL Search Optimizer. You can use these statistics to help fine-tune your settings and monitor what your users see.

To open the Overview page, click **Overview** in the main navigation on the left of the page.

Monitor Number of Searches

HPE IDOL Search Optimizer tracks the total number of searches within the last 24 hours, yesterday, and in the last week. The Overview page also provides information on queries in those time periods that returned no hits, both as a percentage of the total number of searches, and in absolute terms.

View Top Search Terms

You can view information on the top 10 most popular search terms in the last hour, day, or week. In the list of most popular search terms, you can click a linked term to run the search and view the results to help you to understand what the user actually sees. From the Search results page, you can:

- Promote documents or queries (see [Promotions, on page 15](#)).
- Edit or add synonyms or blacklisted terms (see [Keywords, on page 25](#)).
- View the unmodified results, without any promotions or keywords that you set up.

View Zero Hit Terms

The Zero Hit Terms bar graph shows the number of searches that produced no results during the selected time period (in the last day, or in the last week). For the daily view, the searches are divided by hour, for the weekly view, by day. The graph also shows the total number of searches during the selected time period.

You can view information on the top 10 search terms that produced no results. In the list of terms, you can click a linked term to add synonyms for that search (see [Synonyms, on page 25](#)). For example, if the search term *city* appears in the Zero Hit Terms list, you can create a synonym group for that term containing the terms *metropolis* and *town*. When users search again for the term *city*, instead of the search returning no hits, results that contain the terms *metropolis* and *town* are also included.

View Top and Bottom Promotions

You can view details of the top promotions (that is, the promotions that performed best in the last hour, day, or week) and bottom promotions (that is, the least successful promotions in the last hour, day, or week).

week). Click a promotion title to go to the Promotion Details page for that promotion, where you can fine-tune the criteria for the promotion. See [Edit Promotions, on page 18](#) for more information.

Chapter 3: Promotions

This section describes how to set up and edit promotions in the HPE IDOL Search Optimizer user interface.

- [Introduction to Promotions](#) 15
- [Promotions Page](#) 15
 - [Filter the Promotions List](#) 16
- [Set Up New Promotions](#) 16
- [Edit Promotions](#) 18
- [Add Field Text Restrictions](#) 20

Introduction to Promotions

Promotions allow you to target specific content to users based on their search criteria, and to display that content separately from the main search results. You can also specify that specific content should display in a particular position in the search results.

You can set up the following promotion types in HPE IDOL Search Optimizer:

- **Spotlight.** Spotlight promotions display content separately from the main search results when the user searches for terms that trigger the promotion. The following types of spotlight promotion are available:
 - **Sponsored.** Paid advertisements.
 - **Hotwire.** Promoted documents that are shown at the top of a results list for a particular keyword, but are noticeably distinct from the list.
 - **Top Promotions.** A list of documents (not advertisements) that you want to promote internally within your organization.
- **Pin to Position.** Promoted documents appear in the position that you specify when you set up the promotion.

Promotions Page

The main Promotions page lists the following information for each promotion that you set up in HPE IDOL Search Optimizer:

- The type of promotion.
- The name of the promotion.
- The promoting query (in the case of query promotions).

To open the Promotions page, click **Promotions** in the main navigation on the left of the page.

On the Promotions page, you can set up a new promotion (see [Set Up New Promotions, below](#)), or you can click an existing promotion to go to the Promotion Details page and edit the promotion (see [Edit Promotions, on page 18](#)).

Tip: You can also set up new promotions from the Search results page.

Filter the Promotions List

To search for specific promotions, type the terms that you want to search for in the search box. The list of promotions refreshes to show only those promotions that match the terms that you entered.

Tip: You can search for multiple promotions simultaneously. For example, if you set up a Pin to Position Promotion with the trigger keyword *green*, and a Spotlight promotion with the trigger keyword *blue*, you can type *green blue* into the search box to list both those promotions on the main Promotions page.

You can also filter the Promotions list to show only promotions of a particular type.

To filter the Promotions list

1. Click the arrow next to **All Types**. A list of promotion types opens.
2. In the list, click the type of promotion that you want to filter on.

The Promotions list refreshes to show only promotions of the type that you selected.

Set Up New Promotions

You can set up new promotions from the Promotions page, or from the Search page. You can promote individual documents, or you can set up query promotions. If you set up a query promotion, the entire results set for the promoted query is included when a user searches for the trigger term. For example, you can set up a query promotion for the search term *cake* to include the entire results set for a search for the term *cake* in the results set when the user searches for *pudding*.

Use the following procedure to promote documents.

Tip: You can also create promotions directly from the Search page instead of the Promotions page. In this case, Step 1 and Step 2 are not required.

To promote documents

1. In the main navigation on the left of the page, click **Promotions**.
2. Click **Promote Documents**.
3. Type your search terms in the search box at the top of the page, then press ENTER. The Search results page opens.

Tip: You can view only documents in a specific language by clicking the arrow next to the Language list, then selecting the language that you require. In addition, you can sort your results either by relevance or by date.

4. Click **Promote documents**.
5. Select the check boxes next to the documents in the results list that you want to promote.
6. Click **Promote Items**.
7. Click the type of promotion that you want to create, then click **Continue**.
 - a. If you chose to create a **Spotlight** promotion, click the type of Spotlight promotion that you want to create, then click **Continue**.
 - b. If you chose to create a **Pin to Position** promotion, click **+** and **-** to set the position that you want the documents to appear in, then click **Continue**.
8. Type the words to trigger the promotion when a user searches for them, then click **+**. Separate multiple words with a space. Enclose words that you want to be treated as a phrase in quotation marks (for example, "*burmese cat*"). To remove a term, click **x** next to a term.
9. Click **Finish**.

HPE IDOL Search Optimizer creates the promotion, and shows the Search results page with the results for the terms that you chose to trigger the promotion. This allows you to test your promotion to make sure it works as expected.

If you created a Spotlight promotion, your promoted documents appear at the top of the results list. If you created a Pin to Position promotion, your promoted documents appear in a fixed position on the Search results page.

To set up a query promotion

1. In the main navigation on the left of the page, click **Promotions**. Alternatively, start directly from the Search page.
2. Type your search terms in the search box at the top of the page, then press ENTER. The Search results page opens.

Tip: You can view only documents in a specific language by clicking the arrow next to the Language list, then selecting the language that you require. In addition, you can sort your results either by relevance or by date.

3. Click **Promote query**.
4. Click the type of Spotlight promotion that you want to create, then click **Continue**.
5. Type the words to trigger the promotion when a user searches for them, then click **+**. Separate multiple words with a space. Enclose words that you want to be treated as a phrase in quotation marks (for example, "*burmese cat*"). To remove a term, click **x** next to a term.
6. Click **Finish**.

HPE IDOL Search Optimizer creates the promotion, and shows the Search results page with both the results for the terms that you chose to trigger the promotion, and the results for the promoted query. This allows you to test your promotion to make sure it works as expected.

The documents from your promoted query appear at the top of the results list.

Edit Promotions

The Promotion Details page shows all the information for the selected promotion, including the name and type of the promotion, the documents that are included, the language settings, the query that is being promoted (if applicable), any scheduling details, and the search terms and Field Text restrictions that trigger the promotion.

Tip: HPE IDOL Search Optimizer uses the query terms from the search that you used to create the promotion as the name of the promotion. You can change this to better identify promotions. Changing the name does not affect the trigger terms for a promotion.

To edit the name of a promotion

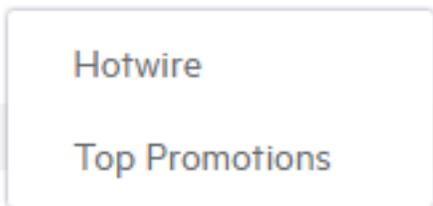
1. Next to the promotion name, click  .
2. Type the new name for the promotion.
3. Click  .

To change the promotion type for Spotlight promotions

- Click the arrow next to the promotion type at the top of the page, then click the new promotion type.

Spotlight Type

Sponsored ▼



To schedule a promotion

1. Click **Schedule**  . The Schedule your promotion page opens.
2. Click **Schedule** to run your promotion at a specified time, or click **Always active** to run your promotion constantly.
3. Click **Continue**.
4. Click  , then use the calendars to select the start and end dates for your promotion schedule.
5. Click **Continue**.
6. Specify the frequency of promotion. Click **Do not repeat** to run the promotion only once, or click **Repeat with frequency below**, then choose a frequency from the list. You can run a promotion schedule weekly, monthly, or yearly.

7. Click **Continue**.
8. Specify the date on which you want the schedule to finish. Click **Never** to run the schedule indefinitely, or click **Run this promotion schedule until the date below**, then click  and use the calendar to select the time and date at which the schedule should end.
9. Click **Finish**. HPE IDOL Search Optimizer schedules the promotion and updates the Promotions Detail page with details of your schedule settings.

To remove search terms that trigger the promotion

- In the **Trigger terms** section of the page, click **x** next to the search term that you want to remove.

Note: You cannot remove the final trigger term in the list.

The promotion is no longer triggered when a user searches for the term.

To add search terms that trigger the promotion

1. In the **Trigger terms** section of the page, type the new search terms to trigger the promotion. Separate multiple terms with a space. Enclose search terms that you want to be treated as a phrase in quotation marks (for example, "burmese cat").
2. Click **+**.
The promotion is triggered when a user searches for the term that you added.

To add documents to a promotion

1. At the top of the list of documents that are included in the promotion, click **Add More**. The Edit Document References page opens.
2. Type the terms that you want to search for in the search field, then press ENTER.
3. On the Search results page, select the check boxes next to the documents that you want to add to the promotion.
4. Click **Save** to update the promotion with the new documents.

To remove documents from a promotion

- In the list of documents that are included in the promotion, click **x** next to the document that you want to remove.

To change the position of a Pin to Position promotion

1. Click  next to the reminder of the current position in the search results.

Position

1 

2. Click **+** and **-** to set the new position at which you want the documents in the promotion to appear.
3. Click . When a user types search terms that trigger the promotion, the documents will appear in the new position in the results list.

To delete a promotion

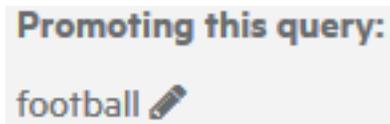
1. From the Promotions page, find the promotion in the list.
2. Click . The Delete Promotion confirmation dialog box opens.
3. Click **Delete**. HPE IDOL Search Optimizer removes the promotion from the Promotions main page.

To view the search results for a search term

- In the **Trigger terms** section of the page, click a search term to view the results for that term.

To edit a query that is being promoted

1. Click  next to the reminder of the query at the top of the list of documents.



2. Edit the query to apply the promotion to.
3. Click .

For more information on query promotions, see [Set Up New Promotions, on page 16](#).

To add Field Text restrictions as a promotions trigger

1. In the **Field Text** section, click **+ Add FieldText Restriction**.
2. Type the Field Text statement that you want to use as a promotion trigger, then click .

Caution: You can specify field text for promotions in the DRECONTENT field only. For example, you can set `MATCH{apple}:DRECONTENT` as a Field Text restriction for a promotion, but not `MATCH{apple}:DRETITLE`. See [Add Field Text Restrictions, below](#) for more information.

Add Field Text Restrictions

You can use the Field Text section on the Search results page to specify fields that result documents must contain, and the conditions that these fields must meet for the documents to return as results (see [Set Up New Promotions, on page 16](#)). Alternatively, you can add Field Text restrictions as a promotions trigger from the Promotion Details page (see [Edit Promotions, on page 18](#)).

For example:

- To match documents whose `DOCUMENT_TYPE` field contains the value *record*:

```
MATCH{record}:DOCUMENT_TYPE
```

- To match documents whose `FILETYPE` field contains one of the values *pdf*, *doc*, or *txt*:

```
MATCH{pdf,doc,txt}:FILETYPE
```

- To match documents whose DIR or DIRECTORY field exactly matches one of *docs*, *archive*, or *work*:

```
MATCH{docs,archive,work}:DIR:DIRECTORY
```

- To use Boolean operators and parentheses to group FieldText restrictions:

```
MATCH{dog}:ANIMAL+AND+(MATCH{celery}:VEGETABLE+OR+NOT+MATCH{quartz}:MINERAL)
```

- To match documents for which SCORE1 is greater than .95 and SCORE2 is less than .85:

```
GREATER{.95}:SCORE1+AND+LESS{.85}:SCORE2
```

- To match documents that have a COUNT field, regardless of its value:

```
EXISTS{}:COUNT
```

- To match documents whose BRAND field contains *tech* as a substring:

```
STRING{tech}:BRAND
```

- To match documents whose EMOTION field contains a string that has the same stem as the word *loving*.

```
TERM{loving}:EMOTION
```

For example, if the EMOTION field has any of the values *love*, *loving*, *loves*, or *lover*, the document matches.

- To match documents whose position (stored in the LAT and LONG fields) is within a distance of 5 kilometers from the point with latitude 52.2°N and longitude 0.12° E:

```
DISTSPHERICAL{52.2,0.12,5}:LAT:LONG
```

- To match documents whose DUE_DATE is before the current time:

```
LTNOW{}:DUE_DATE
```

For more information on how to set up and use Field Text, see the *HPE IDOL Server Administration Guide*, the *HPE IDOL Server Reference*, and *HPE IDOL Expert*.

Chapter 4: Search

This section describes how to use the search to test your keyword and promotion settings to check that the results are as you would expect, and how to work with your results.

- [Work With Search Results](#) 23
 - [Filter Results by Database](#) 23
 - [Filter Results by Date](#) 23
 - [Filter Results by Parametric Values](#) 23
 - [View Related Concepts](#) 24
 - [Use Field Text](#) 24

Work With Search Results

When you run a search in HPE IDOL Search Optimizer, the results appear in the central panel of the Results page. The panel on the right of the Search results page offers various ways to filter your results list or control your query parameters.

Filter Results by Database

- To view only documents from a particular database or databases, click the relevant database names in the **Databases** section.

Filter Results by Date

To filter your results by date

- Click , then use the calendars to select the start and end dates for your search.
The Search results list refreshes to show only results from the date and time that you selected.
To return to your original results list, click **x** next to the filters at the top of the page.

Filter Results by Parametric Values

If your data contains parametric field types, you can filter your search results to include only results that contain a particular parametric value. Click the relevant value in the **Parametric Values** section.

For more information about setting up parametric fields, refer to the *HPE IDOL Server Reference* and the *IDOL Server Administration Guide*.

View Related Concepts

HPE IDOL Search Optimizer displays a list of concepts related to your current search. To view the results for a search on a related concept, click a link in the list.

Use Field Text

You can use the Field Text section on the Search results page to specify fields that result documents must contain, and the conditions that these fields must meet for the documents to return as results. See [Add Field Text Restrictions](#), on page 20 for more information.

Chapter 5: Keywords

This section describes how to use synonyms and blacklists to manipulate the results that are returned to your users.

- [Synonyms](#)25
- [Blacklists](#)26
- [Keywords Page](#)26

Synonyms

You can create a list of synonyms of words so that when users search for particular words, the results also include synonyms of their search terms. For example, you can set up a synonym group so that when a user searches for *dog*, the results that they see also include documents with the words *labrador*, *poodle*, *terrier*, and so on.

Caution: You cannot add Boolean operators such as AND, OR, or NOT to your synonym groups.

To create a new synonym group

1. In the main navigation on the left of the page, click **Keywords**. The Keywords page opens.
2. Click **New**.
3. Click **Synonyms**.
4. Click the arrow next to the Language list, then select the language for the synonym group.
5. Click **Continue**.
6. Type the terms that you want to add to the synonym group, then click **+**. Separate multiple terms with a space. To remove a term, click the **x** next to it.

Tip: To include a phrase in your synonym group, include the phrase in quotation marks. For example, *bengal "norwegian forest cat" burmese*. If a phrase synonym group is matched, HPE IDOL Search Optimizer displays the expanded query after the rules in HPE QMS rules were applied.

7. After you have added all the terms, click **Finish**. HPE IDOL Search Optimizer adds the terms that you entered to the synonym group, then takes you to the search results for the group. This allows you to test the synonym group that you created to make sure it works as you expect.

You can view and edit your synonyms and other keywords on the main Keywords page (see [Keywords Page, on the next page](#) for more information).

Blacklists

The blacklist management features of HPE IDOL Search Optimizer allow you to set up and manage a list of terms that are automatically excluded from any query. If a user searches for a term that you added to the blacklist, the search results that they see do not include the blacklisted term.

You can add terms to the blacklist from the Keywords page in HPE IDOL Search Optimizer.

Caution: You cannot add Boolean operators such as AND, OR, or NOT to the list of blacklisted terms.

To add terms to the blacklist

1. In the main navigation on the left of the page, click **Keywords**. The Keywords page opens.
2. Click **New**.
3. Click **Blacklisted Terms**.
4. Click the arrow next to the Language list, then select the language for the blacklisted terms.
5. Click **Continue**.
6. Type the terms that you want to add to the blacklist, then click **+**. Separate multiple terms with a space. To remove a term, click the **x** next to it.
7. After you have added all the terms that you want to blacklist, click **Finish**. HPE IDOL Search Optimizer adds the terms that you entered to the blacklist.

You can view and edit your blacklisted terms and other keywords on the main Keywords page (see [Keywords Page](#), below for more information).

Keywords Page

The main Keywords page provides information on all the synonym groups and blacklisted terms that you have set up in HPE IDOL Search Optimizer.

To open the Keywords page, click **Keywords** in the main navigation on the left of the page.

From the Keywords page, you can:

- Add new synonyms or blacklisted terms to the keywords list (see [Synonyms, on the previous page](#) and [Blacklists, above](#) for instructions).
- Search the keywords list.
- Filter the page to show blacklisted terms only, or synonyms only.
- Filter the page to show synonyms and blacklisted terms in a particular language.
- Add or remove synonyms.
- Remove terms from the blacklist.
- Click a synonym to view the search results.

Tip: The Keywords section on the right of the Search results page includes links that enable you to create synonyms or blacklisted terms from the query term. You can also view the results for a particular term.

To search the keywords list

- Type a word or part of a word in the search box at the top of the page. The keywords list refreshes to show only the synonym groups or blacklisted terms that contain the letters that you typed.

To filter the keywords list by type

1. Click **All Types**.
2. In the list, click either **Blacklist** or **Synonyms**.

The keywords list refreshes to show blacklisted terms only, or synonym groups only.

To filter the keywords list by language

- Click the arrow next to the Language list, then select the language that you want to view.

To remove synonyms or blacklisted terms

- Click the **x** next to the synonym or blacklisted term that you want to remove. HPE IDOL Search Optimizer removes that term from the keywords list.

To add synonyms to a group

1. Click **+** next to the synonym group that you want to edit.
 2. Type the synonym that you want to add to the group, then click .
- HPE IDOL Search Optimizer adds the synonym to the group.

Send Documentation Feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on User Guide (HPE IDOL Search Optimizer 11.1.1)

Add your feedback to the email and click **Send**.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to AutonomyTPFeedback@hpe.com.

We appreciate your feedback!