Job Aid:

Search Relevancy Functionality

ONPOINT

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Section 1: Search Relevancy

Search Credits

The relevancy search works by giving one credit to a term found in each of three areas of the object record: title, description, and meta tag. This is the case regardless of how many times the phrase appears in any of the three.

So, for example, you have a course set up as follows:

Course Title: Fire Safety – Annual Evaluation

Catalog Description: This is a short online course that explains the process a store manager should follow when performing the annual fire safety evaluation at their store location(s). It includes the actual evaluation survey to be completed.

Meta tag(s): Safety Evaluation

In this example, the term 'evaluation' appears once in the title, twice in the description, and once as a meta tag. When a user searches on the term 'evaluation', this course would score a total of 3 "credits", which is the maximum for any single term.

As you can imagine, a search for something as common as 'evaluation' would therefore find too many objects in the system that meet this criteria. What you want to do is provide some additional ways to help users have more meaningful searches.

Define Objects Sufficiently

One way to improve a user's search results is to make sure you have used enough words to adequately describe objects, since the search will associate credits for each word that is searched on. In our example above, both terms -- 'safety' and 'evaluation' -- are found in the title, description, and meta tag, so this course will score a 6 versus a 3, and therefore appear higher in the search results.   The more words that are then entered into the search by the user, the better their search outcome.

If the user types in 'Fire Safety Evaluation', the course will score an 8. You could increase that score to 9 as the author, by adding the word 'Fire' to your meta tags.

Weighting Results

Another way to increase the effectiveness of the search function is by associating a pre-set "weight" to the three areas of the object record. For example:

Meta tags = 3 credits per found term

Title = 2 credits per found term

Description = 1 credit per found term

In this scenario, each word searched will produce a total possible count of 6, and an author would have the ability to ensure his/her course is the "top hit" by applying meta tags to the content to give it the heaviest weight. This is available for CellCast and Portal customized UI solutions only. [The searches within the Content Viewer application (like a search within a course catalog) work differently.]

So, using our prior example, here would be your search credits:

User enters 'evaluation' – course scores 6 credits

User enters 'safety evaluation' – course scores 12 credits

User enters 'fire safety evaluation' – course scores 15 credits (would be 18 if 'fire' was added as a meta tag)

What about search 'strings' or 'phrases'?

To further strengthen search results, consider the most likely search string the user might enter, then (1) if appropriate, update the title and description to capture the string, and (2) add the string as a separate meta tag.

For example, if the most common search string a manager might use is 'fire evaluation', consider whether you could change the title and/or description to put those words together (not easy in this example title but easy in the second sentence of the example description), and add 'fire evaluation' as a unique meta tag. Those will improve the score credits in the same fashion as the single-term credits – in accordance with any weighting you have applied.

Best Practices

Consider the terms that seem reasonable for a user to enter when they are looking for the item. When you are building the Fire Safety – Annual Evaluation, imagine that the typical manager is going to look for something about fire; they probably know it is a survey or evaluation, and they may or may not know it occurs annually. Take the time to add these terms to the description and as meta tags.

Set the weighting to be appropriate to how your authors have created titles and descriptions in the past, or how you'd like to weight things moving forward. If the title is always the best indicator of the object's subject matter, then you might consider weighting your titles higher than your descriptions and meta tags. If you have a lot of titles that you don't necessarily control (e.g. SkillSoft courses) you might want to begin using meta tags to help with relevancy in your searches, as meta tags can be controlled by your authors/admins. Finally, if you have not always done a thorough job of creating content descriptions, take the time to update those as well.

> **TIP:** Refrain from using any vertical lines ("pipes"), ampersands or commas in a meta tag.