Lucidworks Cloud

2020-06-30

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Lucidworks Cloud Administration

This guide explains how to manage apps and users as an Lucidworks Cloud administrator or account owner.

Before you begin, learn what Lucidworks Cloud is, then sign up.

When you log in to your Lucidworks Cloud account, the dashboard gives you access to these features:

	Admins	**Account Owners**
User management	✓	✓
Search app configuration	✓	✓

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Sign Up

- Trials and licensed apps
- Hosting regions
- Sign up

Sign up for a 7-day trial of Lucidworks Cloud and Site Search.

Trials and licensed apps

When you first sign up to use Lucidworks Cloud, you get a 7-day trial for a single app.

To license an app, contact Lucidworks.

After you have licensed an app, the Lucidworks Cloud dashboard indicates that the app is licensed.

Hosting regions

Each Lucidworks Cloud account, including all apps for the account, is hosted on servers in one of two regions:

- United States of America (USA)
- European Union (EU)

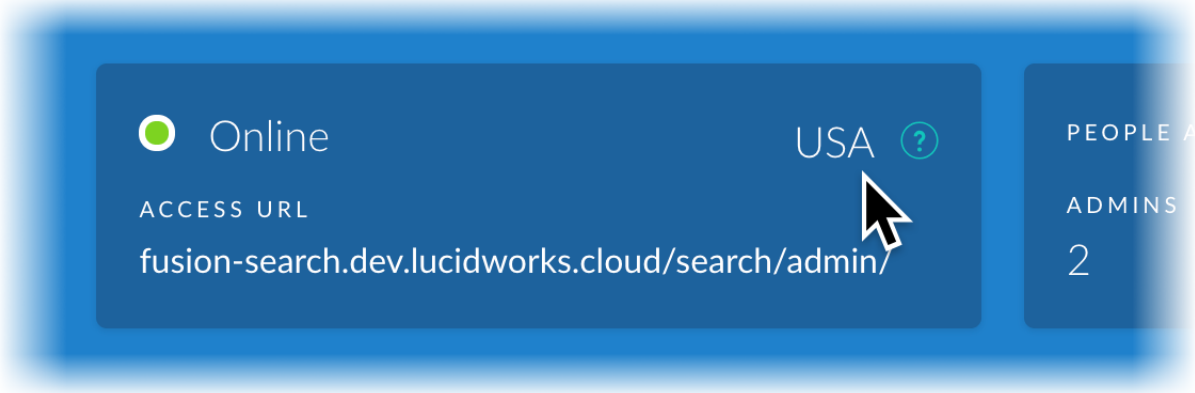
Before Lucidworks sets up your account, you will be asked to choose a hosting region for the account. The hosting region can't be changed after an app is created.

Base your choice of the hosting region on considerations such as these:

- **Proximity of your users to the region** – Choosing the region closest to the users of your search apps minimizes latency and maximizes performance. (This might not be true for international users.)
- **Data policy considerations** – For reasons associated with data policies, you might need to choose a specific hosting region.

Note	Multi-region hosting is not currently available.

On the dashboard, you can see the hosting region on the app tiles:



Sign up

Sign up for a 7-day trial of Lucidworks Cloud and Site Search.

How to sign up

1. Open http://lucidworks.com/cloud/ and enter your information, which will be sent to Lucidworks.
2. Lucidworks will create an account for you. This can take up to one business day.
3. When your account is created, you'll receive an account-activation email.
4. Click the link in the email to open the Activate Your Account page.
5. Enter a password for your new account, confirm your password, and agree to the Terms of Service and Privacy Policy.
6. Click **Activate Account**.

   The Sign In page appears.

Tip	Your hostname appears on this page. You might need to enter it in the future when signing it. Make a note of it.

7. Enter your password, and then click **Sign In**.
8. Tour the dashboard to start using Lucidworks Cloud.

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Tour the Dashboard

- Sign in
- The Dashboard
- Sign out

As an administrator, you can use the Lucidworks Cloud dashboard to manage all of your search apps.

Sign in

Sign in to Lucidworks Cloud:

1. Open the Lucidworks Cloud dashboard.

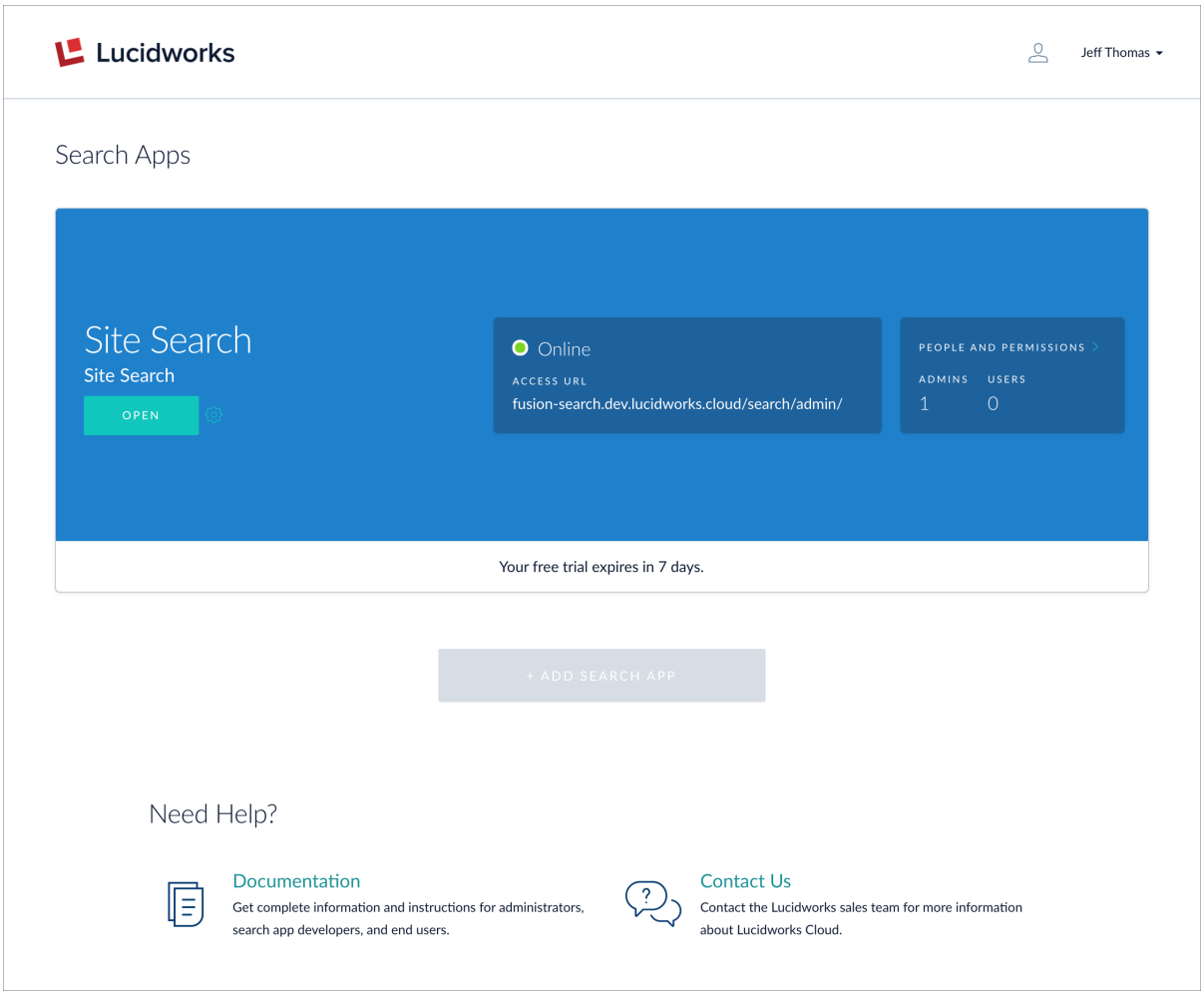
   A Sign In page appears.

2. Enter your **Email Address**, and then click **Sign In**.
3. Enter your **Password**, and then click **Sign In**.

   The Lucidworks Cloud dashboard appears.

The Dashboard

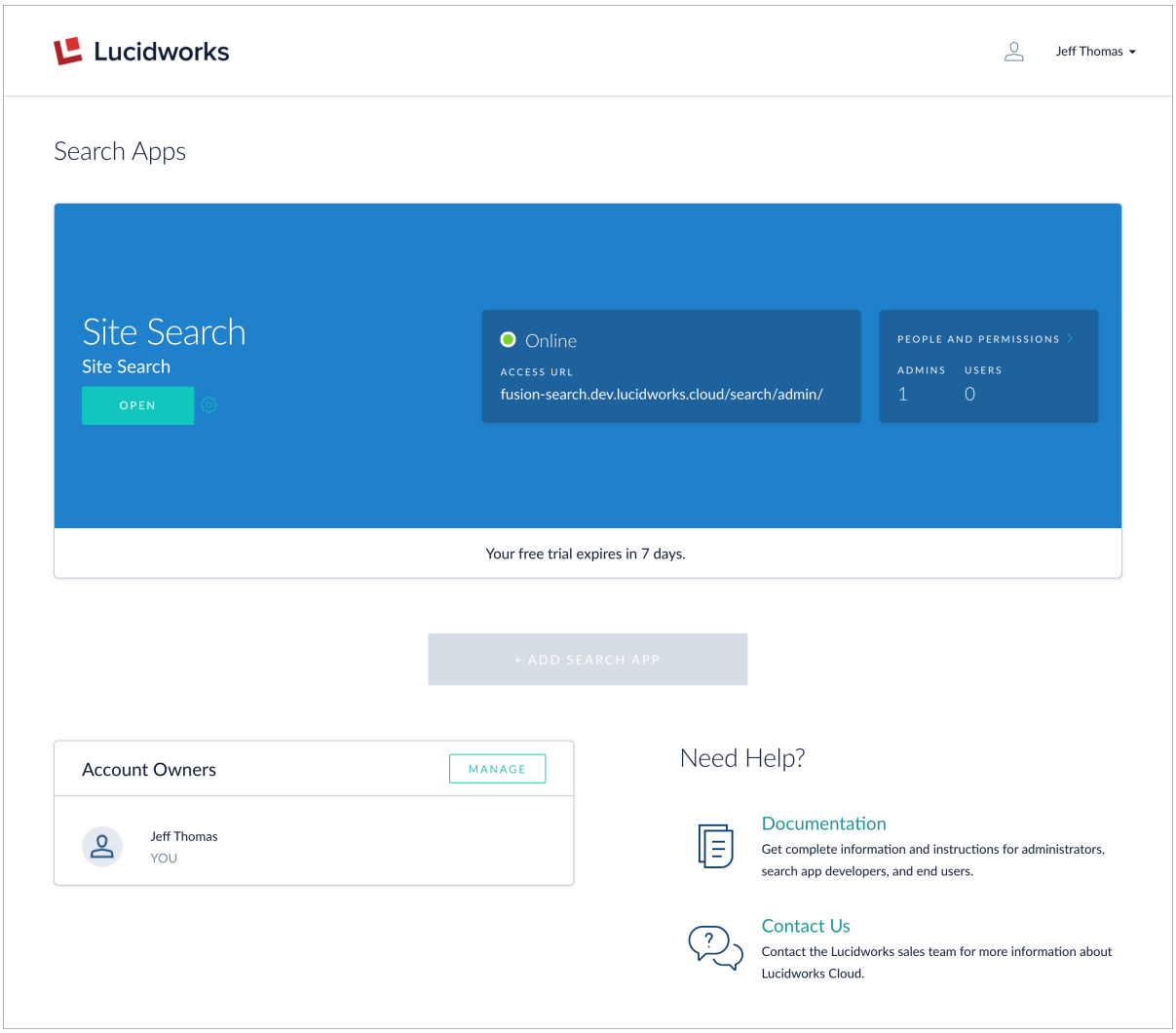
This is an example of the dashboard for an administrator.



From the dashboard, you can:

- Create, configure, and delete apps
- Manage app administrators
- Get help from the documentation or the Lucidworks team

If you are an account owner, your dashboard also has site management features, including the ability to add other account owners:



Sign out

You can sign out of Lucidworks Cloud from the dashboard or from a Site Search app. If you sign out, either from the dashboard or Site Search (these are identical), then the next time you open the dashboard or a Site Search app, you must log in again.

If you exit your browser, then you are signed out. You will need to sign in again the next time you use the dashboard or a Site Search app.

How to sign out from the dashboard

On the dashboard, in the upper right corner, click your user name, and then click **Sign Out**.

How to sign out from a Site Search app

In the Page Builder, click your name, and then click **Sign Out**.

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Manage Apps

- Create an app
- Open an app
- Configure an app
  - Change an app's name
  - Add users to an app
  - Add data sources and customize an app
- License an app
- Delete an app

When Lucidworks first creates your Lucidworks Cloud account, you get one app out of the box, named "Site Search".

You can change the name of the Site Search app and add users to it (you only need to add users who will have the Admin or Owner role).

Create an app

If you're working on a trial app and you decide to start from scratch, an account owner or administrator can delete that app, and an account owner can create a new trial app. When you have licensed apps, you still have one trial app.

How to create a new app

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Click **Add Search App**.

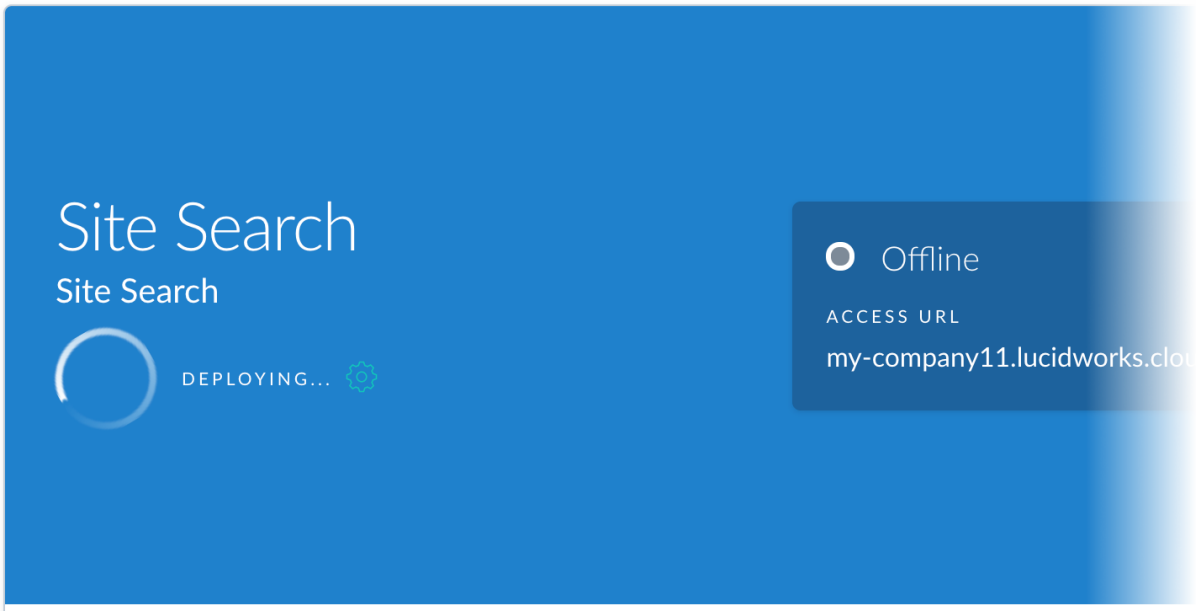
3. Customize the path to the new app.

   This path is appended to your domain name, as in `https://subdomain.lucidworks.cloud/pathname`.

   For example, you could choose `https://subdomain.lucidworks.cloud/intranet`, `https://subdomain.lucidworks.cloud/customers`, `https://subdomain.lucidworks.cloud/archive`, and so on.

4. Click **Create New App**.

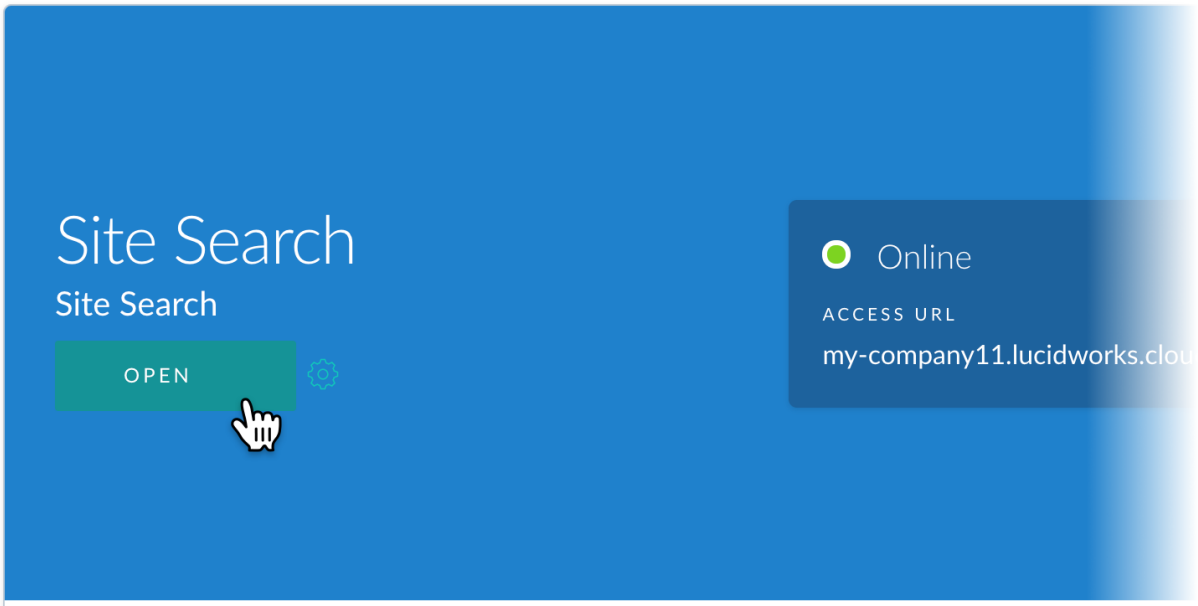
   This returns you to the dashboard, where your app is shown as "Deploying":



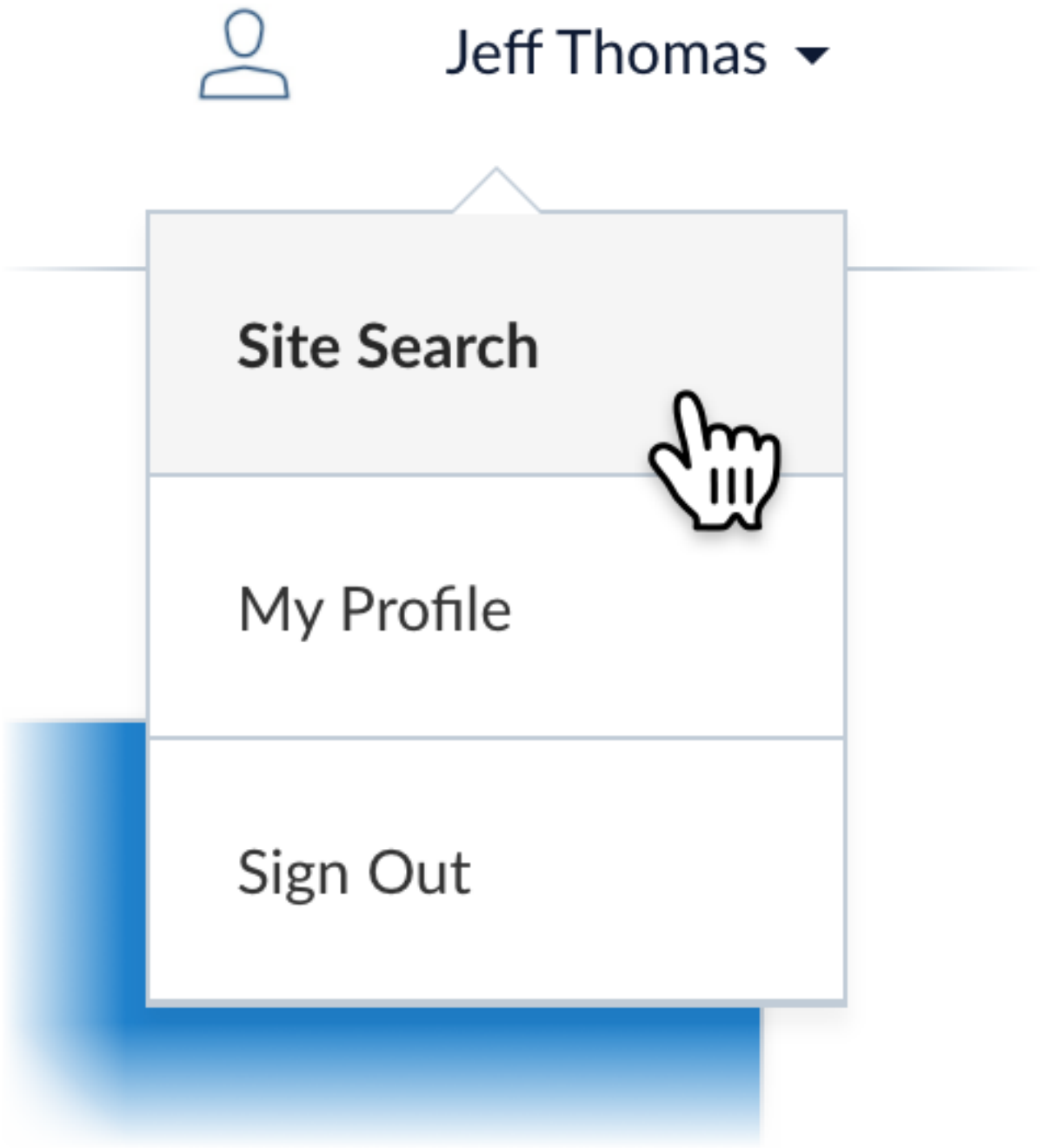
Deployment takes a few minutes. When the new app is ready, an **Open** button appears.

Open an app

Your apps are always running and available. To view or modify an app's end-user interface, click **Open**:



You can also open your apps from the from the User menu, which has links to all of your apps:



As an administrator or account owner, your view of the UI includes an Edit icon that you can click to modify the user interface.

Configure an app

Admins can configure the apps for which they have been added as administrators. An account owner can configure all apps.

Change an app's name

When you create a search app, its default name is "Site Search". You can customize this name to keep your search apps

organized. The search app name is only used in the dashboard; it doesn't appear in an app's user interface.

How to change an app's name

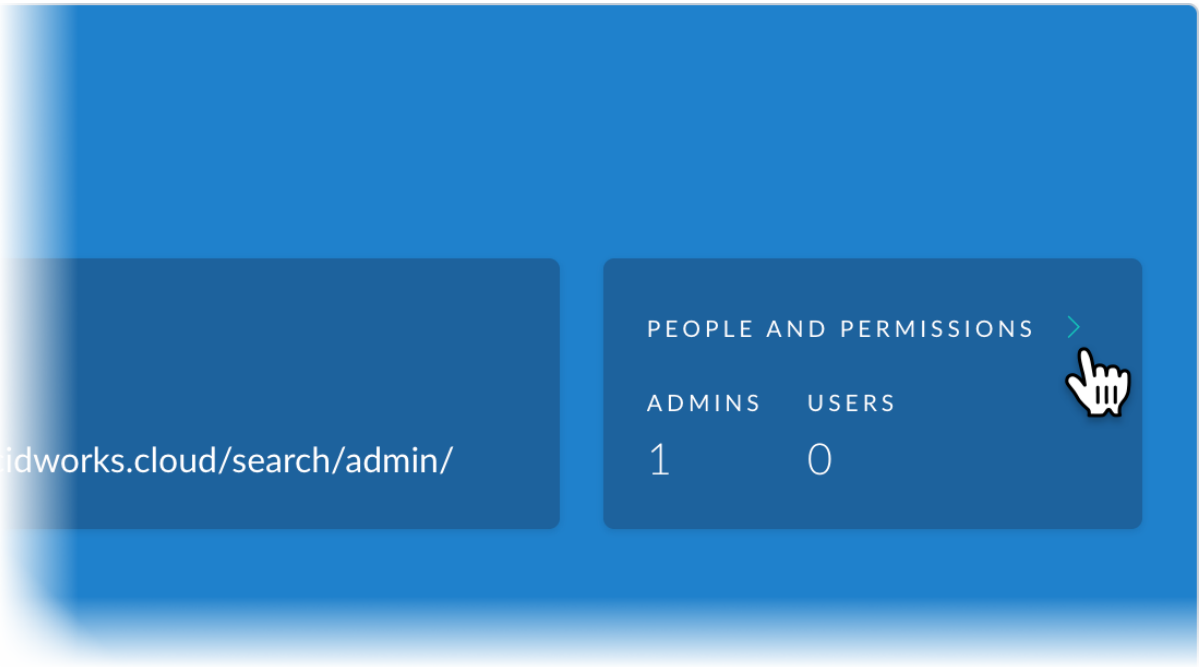
1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the search app that you want to rename.
3. To the right of the Open button, click Edit .
4. Enter a new name in the **Name of App** field.
5. Click **Update**.

Add users to an app

Each app can have any number of administrators. When you add a user, the new user's initial role is Admin.

How to add a user to an app as an administrator

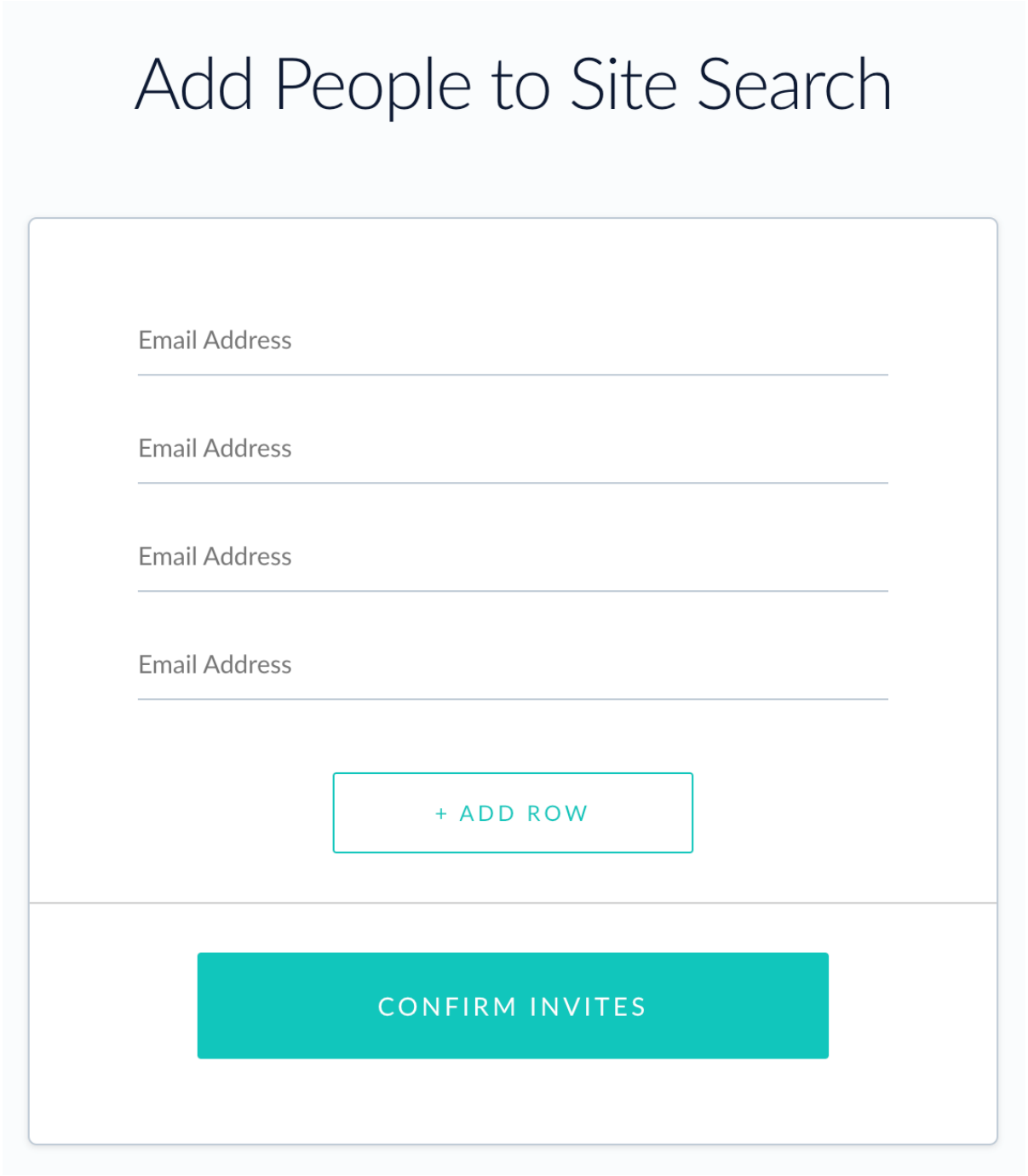
1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the app to which you want to add a user.
3. Click **People and Permissions**:



   Here you can see all existing users for this app.

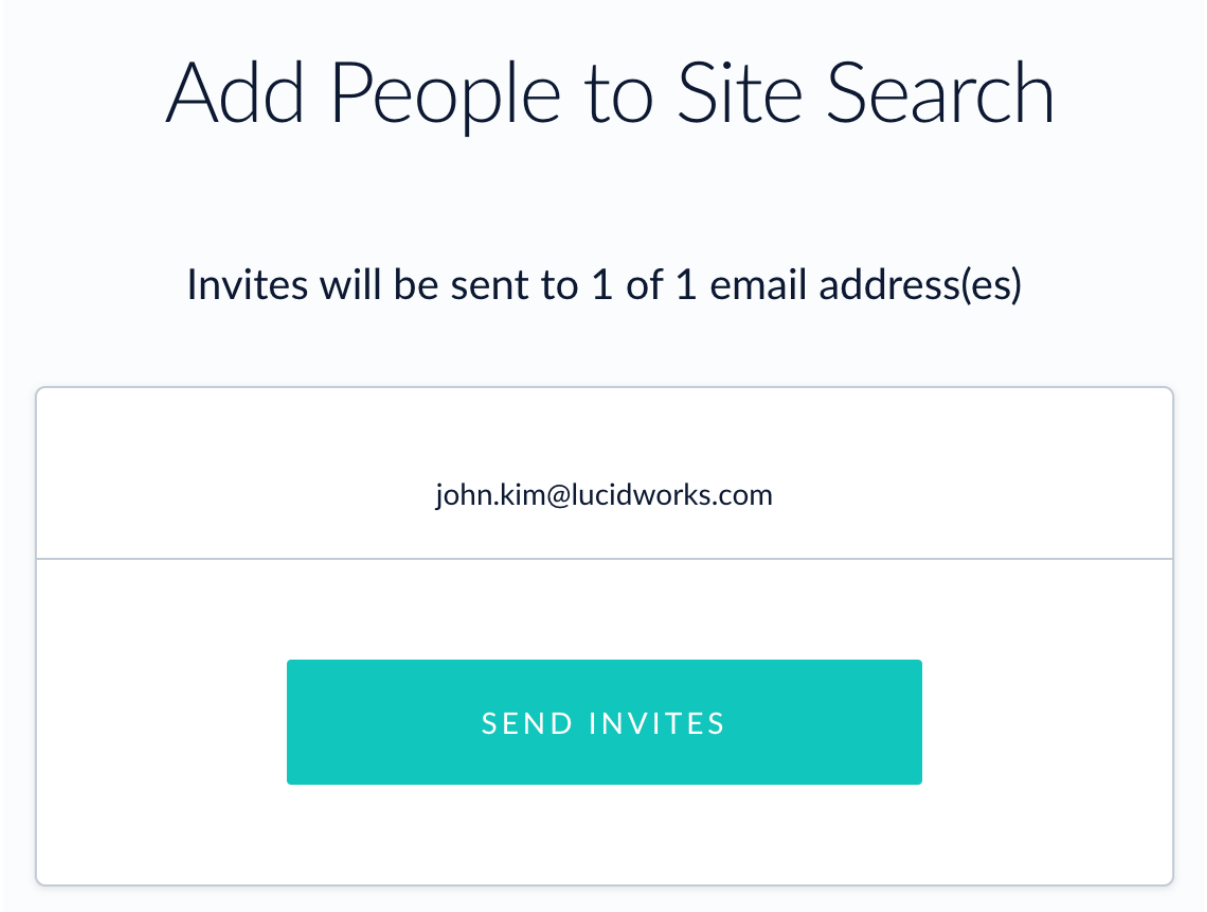
4. Click **Invite People**.

   The Add People to Site Search page appears:



5. Enter email addresses for the users you want to add.
6. Click **Confirm Invites**.

   A confirmation screen appears, displaying the email addresses you entered:



7. Click **Send Invites**.

   An invited user receives an email message with a link to activate the new account, create a profile, and choose a password.

Add data sources and customize an app

As an administrator or account owner, you can develop search apps by adding data sources and customizing the search interface.

How to start developing a search app

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Open the search app you want to develop.

   The search interface appears, and you are in Admin mode.

License an app

To license an app, contact Lucidworks.

After you have licensed an app, the Lucidworks Cloud dashboard indicates that the app is licensed. There is nothing more you need to do.

Delete an app

When an app is no longer needed, you can delete it.

Caution	Deleting an app removes that app and all of the data that was associated with it.

How to delete an app

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the search app you want to delete.
3. To the right of the Open button, click Edit .
4. Click **Delete App**.
5. Click **Delete** to confirm the deletion.

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Manage Administrative Users

- User roles
- Add administrators
- Re-send a user's invitation
- Reset a user's password
- Change your own password
- Reset your forgotten password
- Remove an administrator from an app
- Add account owners

As a Lucidworks Cloud administrator, you can manage other administrators who can access your Site Search apps.

The Lucidworks Cloud account owner has the Owner role. The account owner has Admin permissions across all apps in your subdomain, and can edit site-wide configurations. You can create additional account owners who have the same permissions.

User roles

When a user accepts an invitation to use a Site Search app, the user has the role Admin and becomes an administrator of the app.

Note	For Site Search, the User role is not used, though it is still present. Don't revoke the Admin role for a user (to give the user the User role). Users with the User role can't run a Site Search app. End users can search through embedded Site Search modules and in apps that use the Search API, without needing to be users of the Site Search app.

Per-app roles

Site-wide role

User

Admin

Owner

- *Not used*
- Use apps
- Invite new users
- Change a user's role
- Create apps
- Configure apps

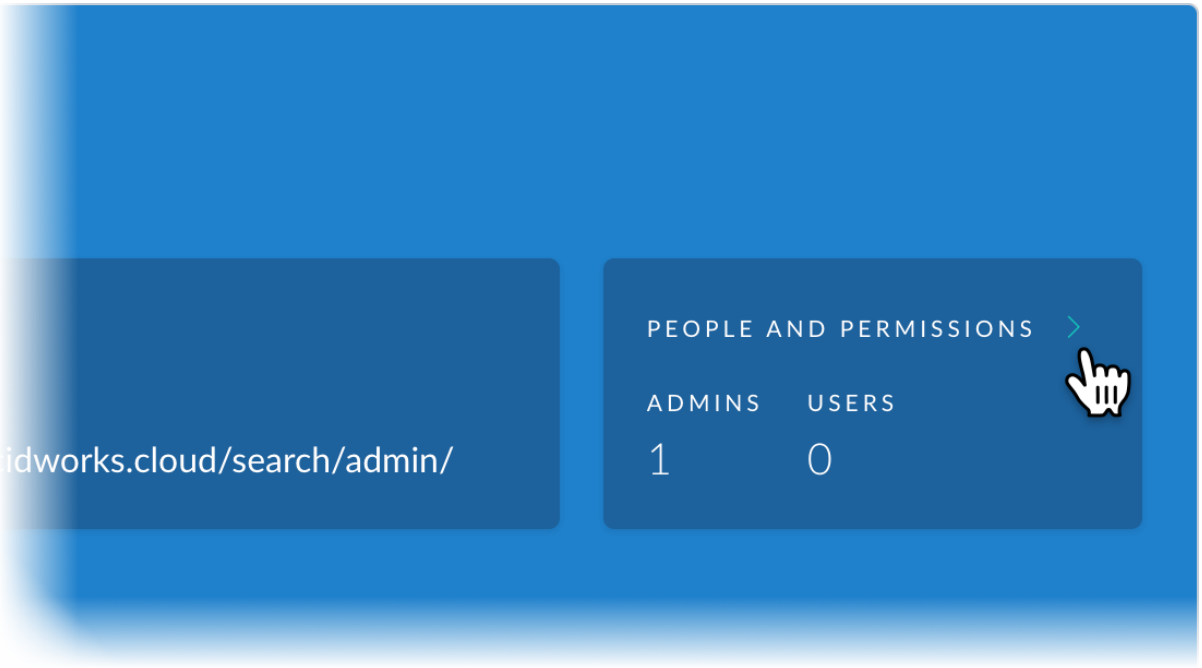
- Delete apps
- Use apps
- Invite new users
- Change any user's role site-wide
- Configure any app site-wide
- Delete any app site-wide

Add administrators

Each app can have any number of administrators. When you add a user, the new user's initial role is Admin.

How to add a user to an app as an administrator

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the app to which you want to add a user.
3. Click **People and Permissions**:



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4. Click **Invite People**.

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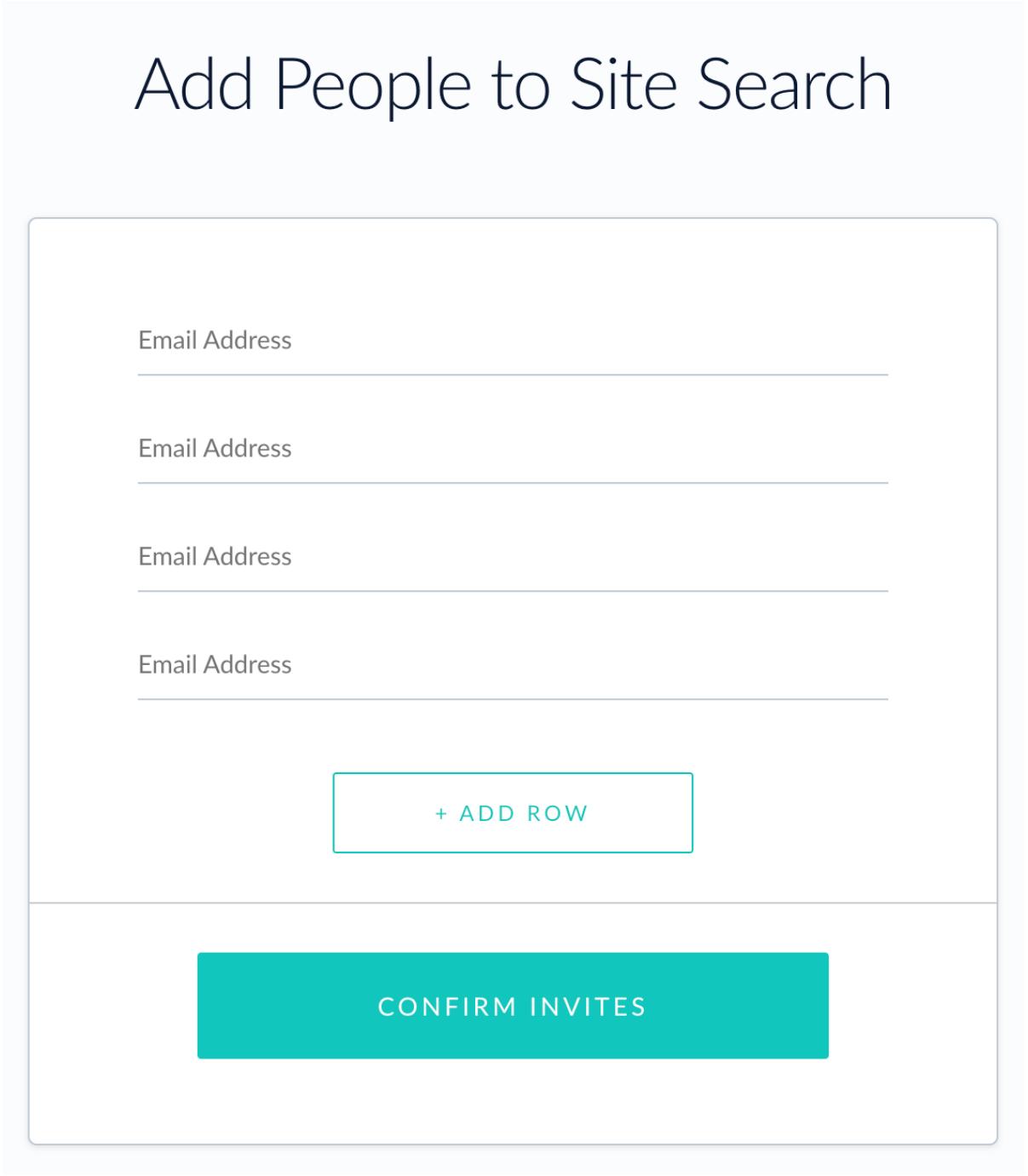

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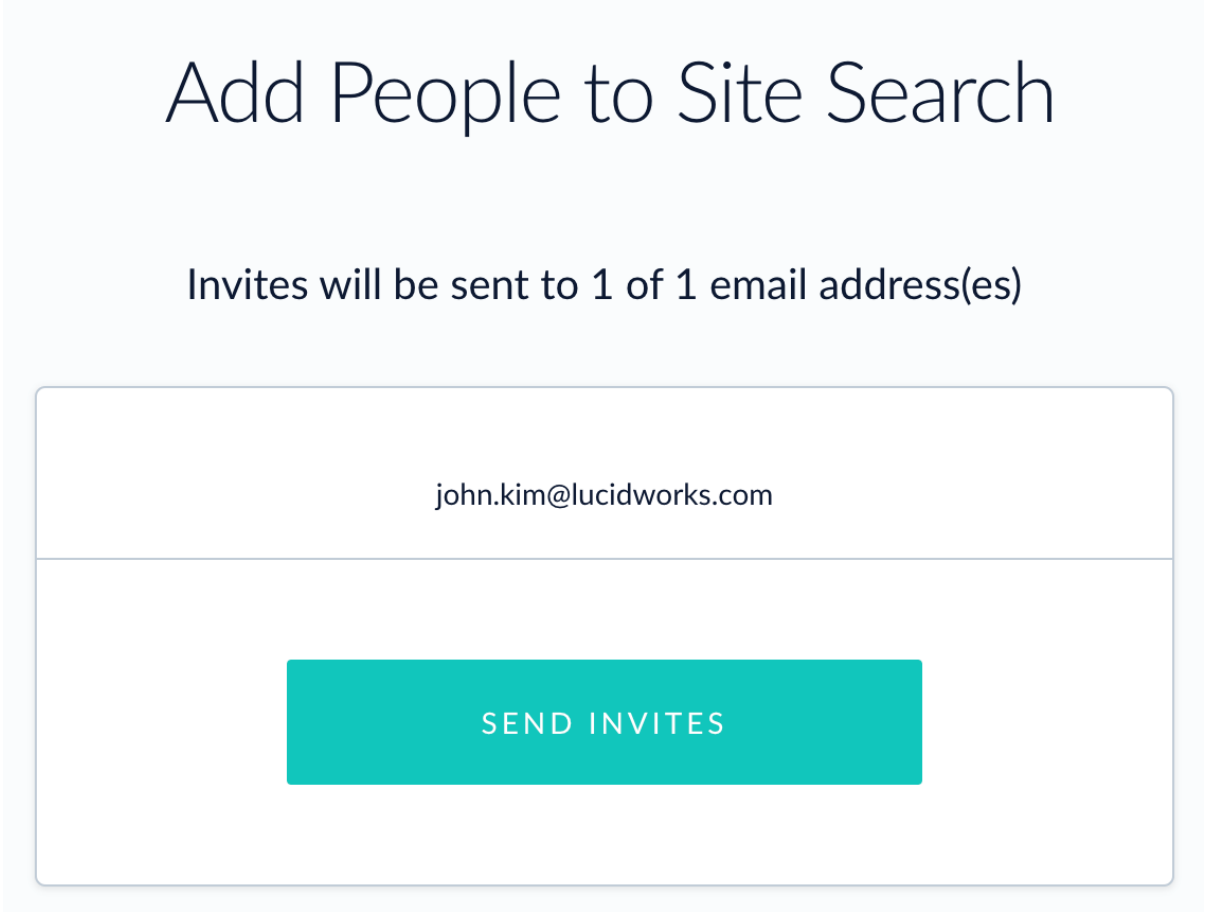
6. Click **Confirm Invites**.

   A confirmation screen appears, displaying the email addresses you entered:



7. Click **Send Invites**.

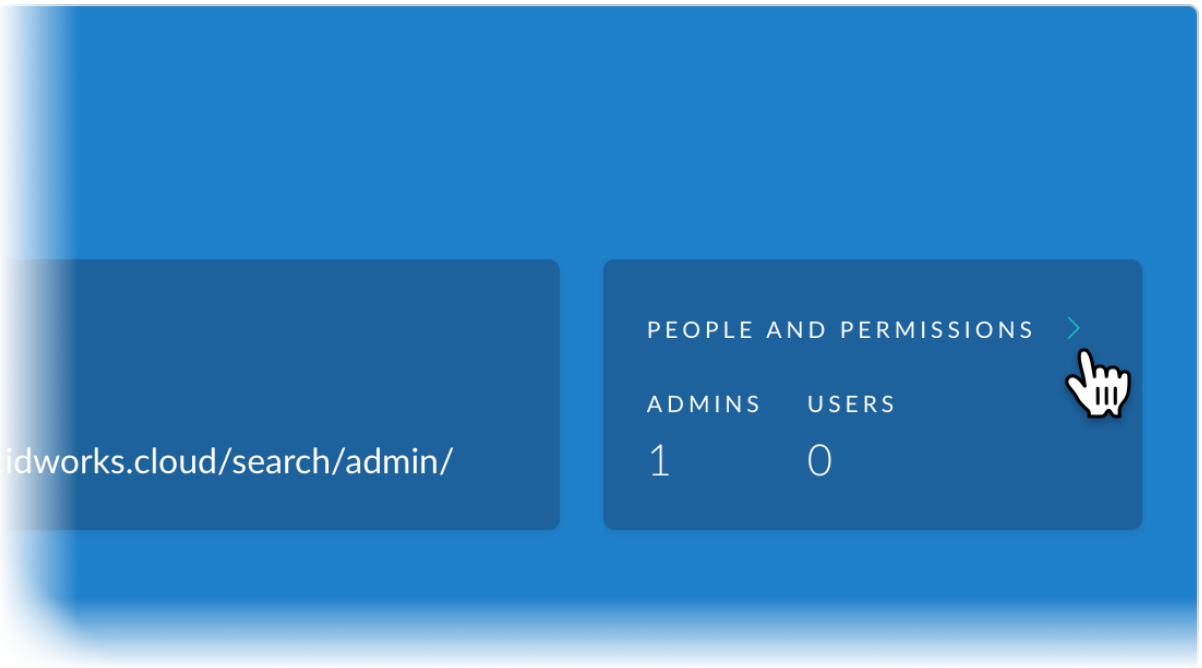
   An invited user receives an email message with a link to activate the new account, create a profile, and choose a password.

Re-send a user's invitation

If you need to re-send an invitation to a new user, follow these steps:

How to re-send an invitation

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the app to which you want to add this user.
3. Click **People and Permissions**.



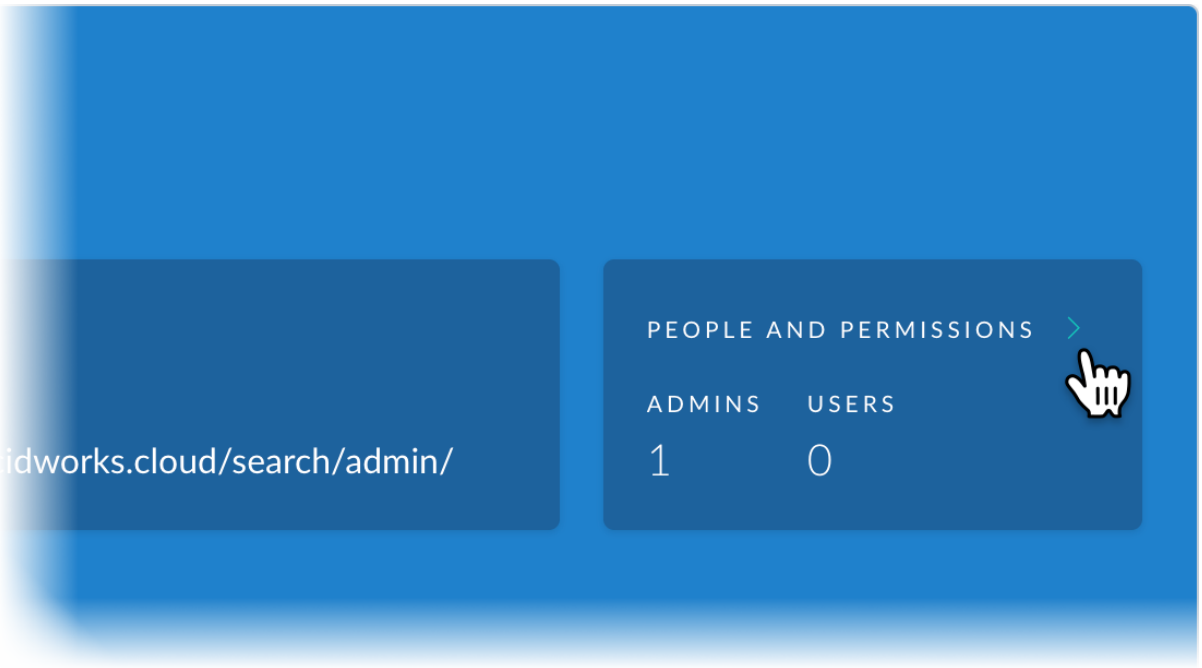
4. On the People and Permissions page, locate the user and click the More Actions icon (⋯) in the **Actions** column.
5. Select **Resend Invite Email**.

Reset a user's password

If you need to reset a user's password, follow these steps:

How to reset a user's password

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the app to which the user belongs.
3. Click **People and Permissions**.



4. On the People and Permissions page, locate the user and click the More Actions icon (···) in the **Actions** column.
5. Select **Reset Password**. Lucidworks Cloud sends a Lucidworks Cloud Password Reset email.
6. The user clicks the **Reset Password** button in the email.
7. The user enters and confirms a new password, and then clicks **Reset Password**.

Change your own password

If you decide to change your password:

How to change your own password

1. In the upper right, click your name, avatar, or the dropdown triangle ▾ beside your name, and then click **My Profile**.
2. Next to **Password**, click **Change**.
3. Enter your current password and your new password, confirm your new password, and then click **Update**.

Reset your forgotten password

If you forget your own password and need to reset it, follow these steps:

How to reset your forgotten password

1. Open the Sign In page at https://lucidworks.cloud/signin.
2. Enter your email address, and then click **Sign In**.
3. Click **Forgot Password?**.
4. On the next page, your email address is automatically added in the form. Click **Send Password Reset Email**.
5. You'll receive an email that contains a link to reset your password.

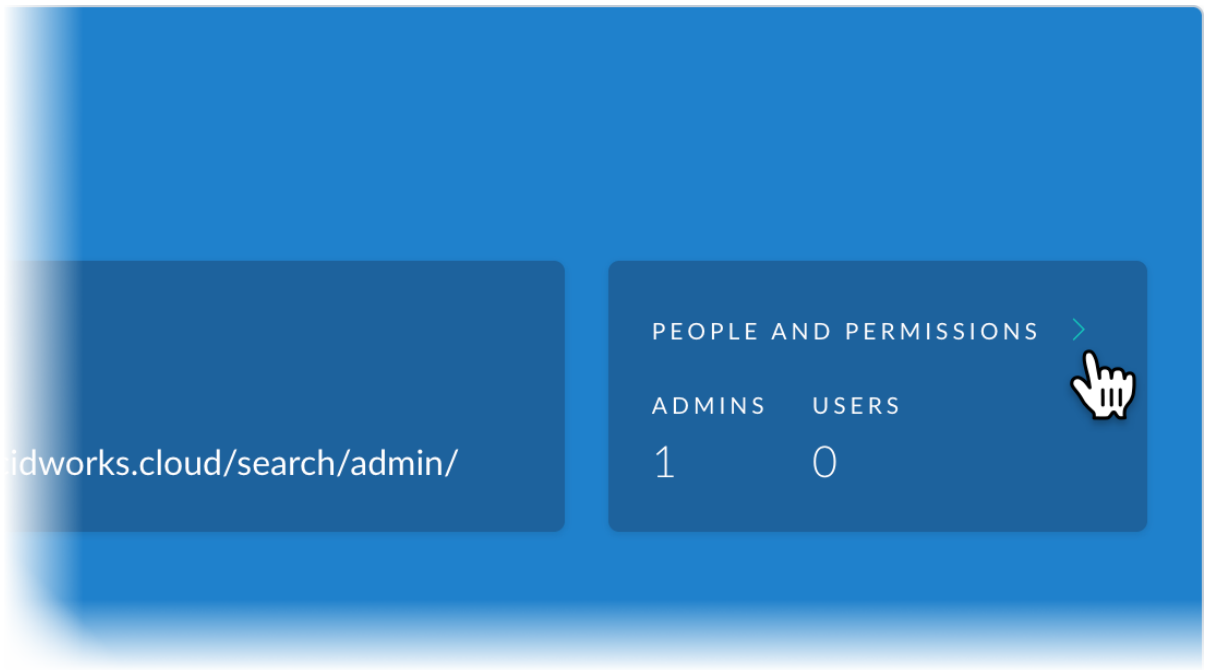
Remove an administrator from an app

De-activating a user's account revokes the user's *Admin* access to a search app. After removal, the user can only become an Admin again with an invitation from an admin or account owner.

If you remove a user from all of their apps, their account information remains in the system. If you add the user to another app, they do not need to enter their account information or create a password again.

How to remove a user from an app

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll to the search app from which you want to remove the user.
3. Click **People and Permissions**.



4. On the People and Permissions page, locate the user and click the More Actions icon (⋯) in the **Actions** column.
5. Select **Remove From App**.

Add account owners

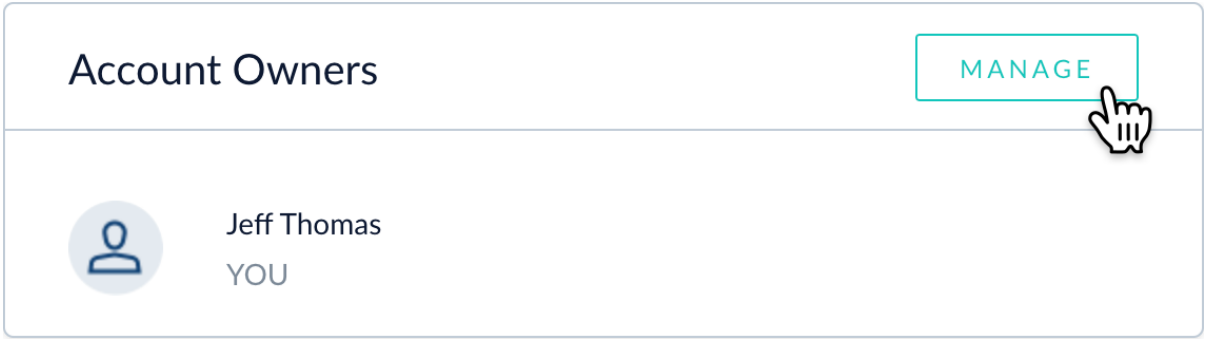
An account owner has site-wide permissions to:

- Use apps
- Invite new users
- Change any user's role site-wide
- Configure any app site-wide
- Delete any app site-wide

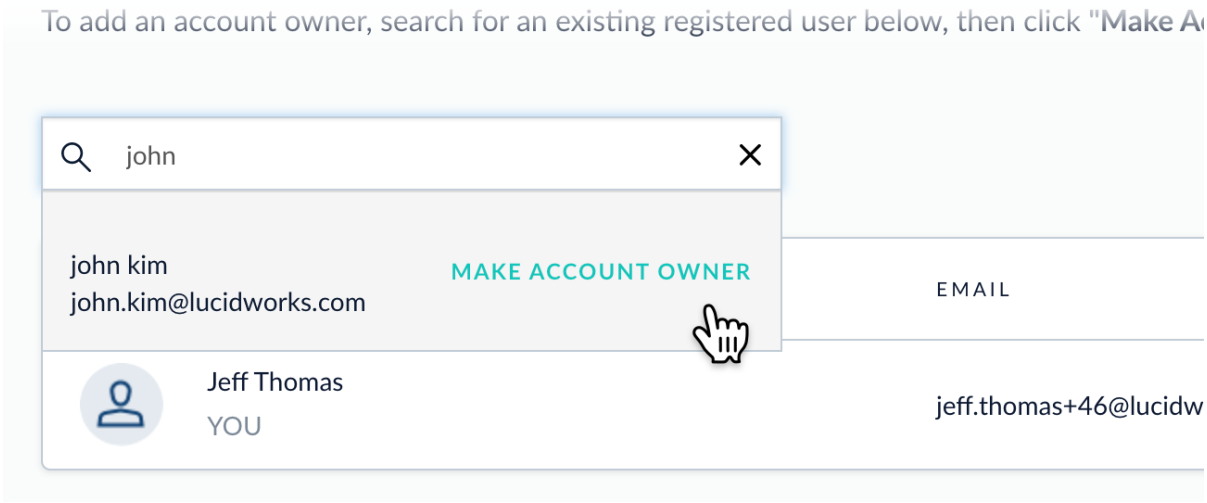
A user must already exist in Lucidworks Cloud in order to become an account owner. If the user doesn't already exist, add the user first.

How to add an account owner

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Scroll down to Account Owners and click **Manage**.



3. In the search field, enter the email address of the Lucidworks Cloud user that you want to designate as an account owner.
4. Next to the user's name, click **Make Account Owner**.



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Security

- Security during data ingestion
- Secure data storage in the cloud
- Cookies

Security is critical when it comes to your data. Lucidworks Cloud is designed with this in mind.

Security during data ingestion

- **JSON** and **CSV** ingestion is SSL-encrypted.
- **Website** data sources only crawl public websites; as such, no special security measures are applied.

Secure data storage in the cloud

Lucidworks Cloud is designed to be:

- **Secure**

  Your data is encrypted on disk. The Lucidworks infrastructure team regularly applies security updates at the operating system level.

Only your administrators and account owners can manipulate your data. Lucidworks personnel cannot access your data unless you invite them as administrators, for example for support purposes.

Anyone with access to websites in which Site Search modules are embedded or websites that use the Search API can search your data.

- **Persistent**

  Cloud apps are designed to recover automatically in case of failure, with no loss of indexed data.

- **Sandboxed**

  Every app's data is stored on a separate volume. One app's data does not mingle with data from another app, and your organization's data is isolated from every other organization's data.

Cookies

In the browser, cookies are used to track all Cloud users, by email address, for the purposes of session persistence, delivering customized content, and analyzing usage. If you disable cookies in your browser, you limit your ability to use Lucidworks Cloud.

Also read about cookies and personal data.

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Your Data

- Data source types
- Data privacy
- Cookies and personal data
- Data ownership

Lucidworks understands that your data is critical to your organization's success.

Data source types

Your data is secure during ingestion and storage.

Data privacy

Data in Site Search is *not private*. Data in Web crawler data sources comes from the public Web. Any user with the URL of the Site Search app can search the data. If you embed Site Search modules in web pages, then any users with access to those web pages can search the data. If you use the Search API to provide search capability in an app, then any users with access to the app can search the data.

In other regards, Lucidworks Cloud adheres to the Lucidworks Privacy Policy.

Cookies and personal data

By embedding Lucidworks modules or libraries in your website, you acknowledge that your website will use cookies in your users' browsers and will collect and process personal data from your users, including IP addresses. Ensure that your website complies with any applicable laws and regulations regarding the use of cookies and the collection and processing of personal data. For the EU, for example, these laws and regulations include the EU General Data Protection Regulation (GDPR) and the EU Cookie Law.

Data ownership

You own your own data, even when it's stored in Lucidworks Cloud. See the Terms of Service for additional details.

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Site Search Guide

Site Search lets users search for content in indexes created from data sources. Site Search searches *publicly available* documents. Users don't need to log in to search.

Data source types

Data source types are:

- **Web crawler** – Index web pages on a website that is on the public Web.
- **CSV** – Index a comma-separated value (CSV) file. The delimiter can be a comma or tab.
- **JSON** – Index a JSON file.
- **Push Endpoint** – Index data sent to a push endpoint.

Tip	Per-document and wildcard-based document blocking are available, but they aren't intended as security measures. They're intended to clean up the index to remove unnecessary content such as website landing pages. Document blocking is not user- or role-based.

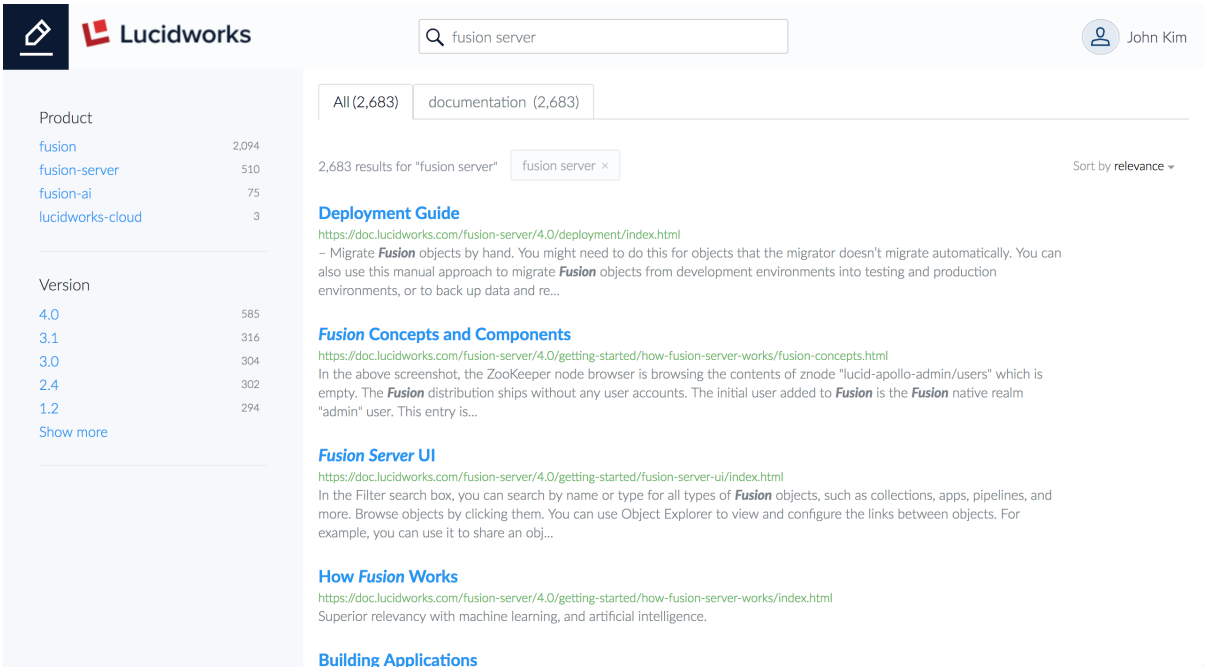
Features

Site Search provides:

- **Cloud-based search back end** – A Site Search app's back end performs the searches that users request.
- **Browser-based Site Search apps** – A Site Search app is a browser-based Admin UI where you develop the functionality of a search app, as well as gain insights about use of the app through analytics and usage information.
- **Embeddable modules** – Embedded modules provide Site Search functionality on your websites.

  Site Search includes modules for search boxes, facets, topic tabs, related documents, and displaying search results.
- **Interactive search analytics and usage data** – Search analytics data includes metrics for queries, results, and users. Usage data for a specific time period includes a timeline of daily search totals, the average number of queries per day, the average response time, the click-through rate, the busiest days of the week, and the busiest times of day.
- **Site Search APIs** – Site Search APIs provide an alternative means of providing search functionality on web pages. You can also use the APIs from web apps. APIs are available for searching, suggesting query completions, pushing documents to a Push Endpoint data source, and deleting documents from a Push Endpoint data source.

This is an example of a Site Search app:



Next steps

- Get started using Site Search.
- Take tutorials.
- Develop search apps.
- Search.
- Integrate using modules.
- Style modules with CSS.
- Tune searches.
- Use language features.
- Gain insights.
- Integrate using APIs.

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Get Started

Get started using Site Search:

1. Review requirements – Site Search requires specific browsers. Someone at your enterprise must have signed up to use Site Search.
2. Tour the Admin UI. – When you open a Site Search app, you are using the Site Search Admin UI. Learn more about the Admin UI.
3. Take tutorials. Take tutorials to get an overview of Site Search features and to learn by doing.

Next steps

After acquainting yourself with Site Search, visit these parts of the documentation to learn and do more:

- Develop search apps.
- Search.
- Integrate using modules.
- Style modules with CSS.
- Tune searches.
- Use language features.
- Gain insights.
- Integrate using APIs.

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Requirements

Following are requirements for developing Site Search apps.

Software requirements

Following are software requirements for the Admin UI and for embedded Site Search modules.

Admin UI

The Site Search Admin UI runs in the following browsers:

- **Chrome** – Latest version
- **Firefox** – Latest version and latest Extended Support Release (ESR) version
- **Internet Explorer** – Version 11

Embedded modules

Embedded Site Search modules run in the following browsers:

- **Chrome** – Latest version and the prior four major versions
- **Firefox** – Latest version and latest Extended Support Release (ESR), and the prior four non-ESR major versions
- **Internet Explorer** – Versions 11 and 10

Signup and role requirements

Before you can develop a search app:

- Someone at your enterprise must have signed up to use Site Search.
- You must have the Admin or Owner role. The person who signs up for Site Search has the Owner role. That person can invite other users, who have the Admin role automatically after accepting the invitations. The first account owner can also give other administrators the Owner role.

For more information about roles, see User roles.

Trial apps and the trial period

One trial Site Search app exists out-of-the-box. The trial period is per-app and it lasts for 7 days. You can only have one trial app at a time.

To license an app that you've developed, contact Lucidworks. You'll also find a Contact Us link at the bottom of the Lucidworks Cloud dashboard.

Cookies and personal data

By embedding Lucidworks modules or libraries in your website, you acknowledge that your website will use cookies in your users' browsers and will collect and process personal data from your users, including IP addresses. Ensure that your website complies with any applicable laws and regulations regarding the use of cookies and the collection and

processing of personal data. For the EU, for example, these laws and regulations include the EU General Data Protection Regulation (GDPR) and the EU Cookie Law.

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Site Search Admin UI

- Sign in to Lucidworks Cloud
- Open the Admin UI
- Add a data source
- Tour the Admin UI
    - Parts
    - Navigation and configuration
    - Open the Page Builder
    - Open Search
    - Configure Site Search
- Sessions

Use the Site Search Admin UI to develop and configure Site Search apps. Work in the Admin UI creates the foundation for providing Site Search functionality in your search apps, either by embedding modules in the web pages of your websites or by using the Site Search REST APIs.

Sign in to Lucidworks Cloud

Sign in to Lucidworks Cloud:

1. Open the Lucidworks Cloud dashboard.

   A Sign In page appears.

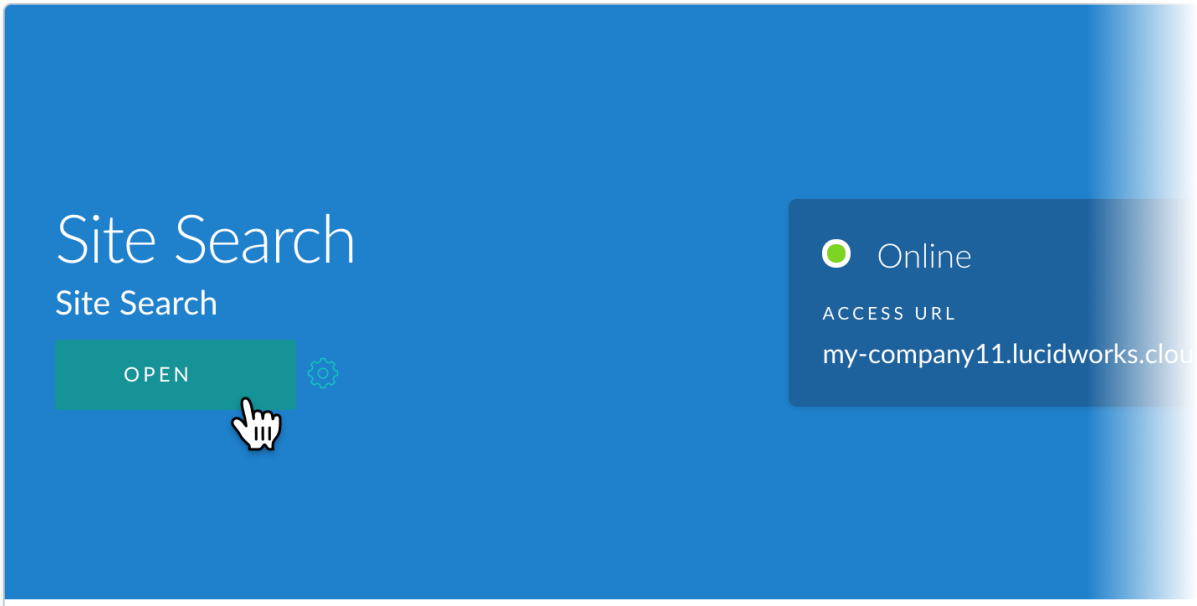
2. Enter your **Email Address**, and then click **Sign In**.
3. Enter your **Password**, and then click **Sign In**.

   The Lucidworks Cloud dashboard appears.

Open the Admin UI

Open the Admin UI to develop or manage a Site Search App.

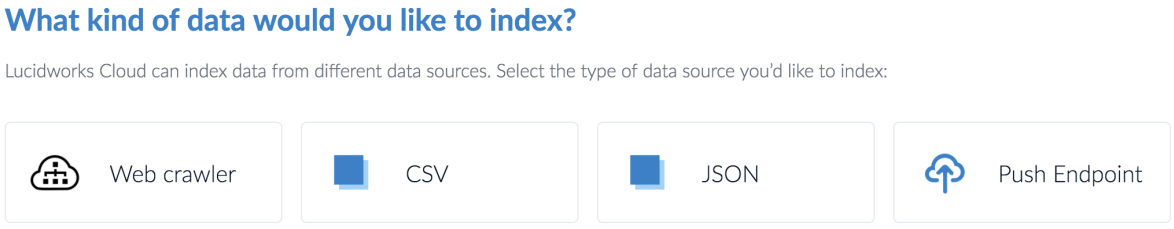
1. On the Lucidworks Cloud dashboard, scroll down to the app.
2. Click **Open**.



The Site Search Admin UI opens. You are ready to develop and configure the chosen app.

Add a data source

Pretty much everything in the Admin UI depends on having a data source that has been indexed. When you first open the Admin UI, it opens a panel for indexing data from a data source.



Tour the Admin UI

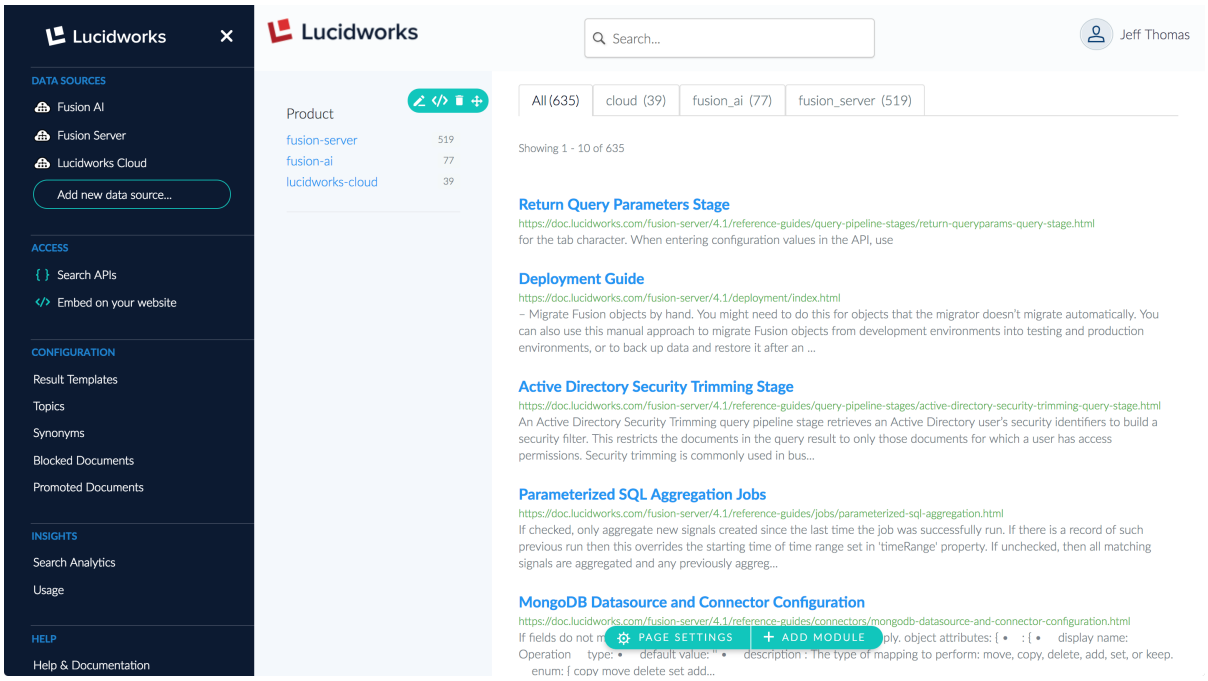
Tour the Admin UI to become acquainted with its parts and navigation.

Parts

The Admin UI has three parts:

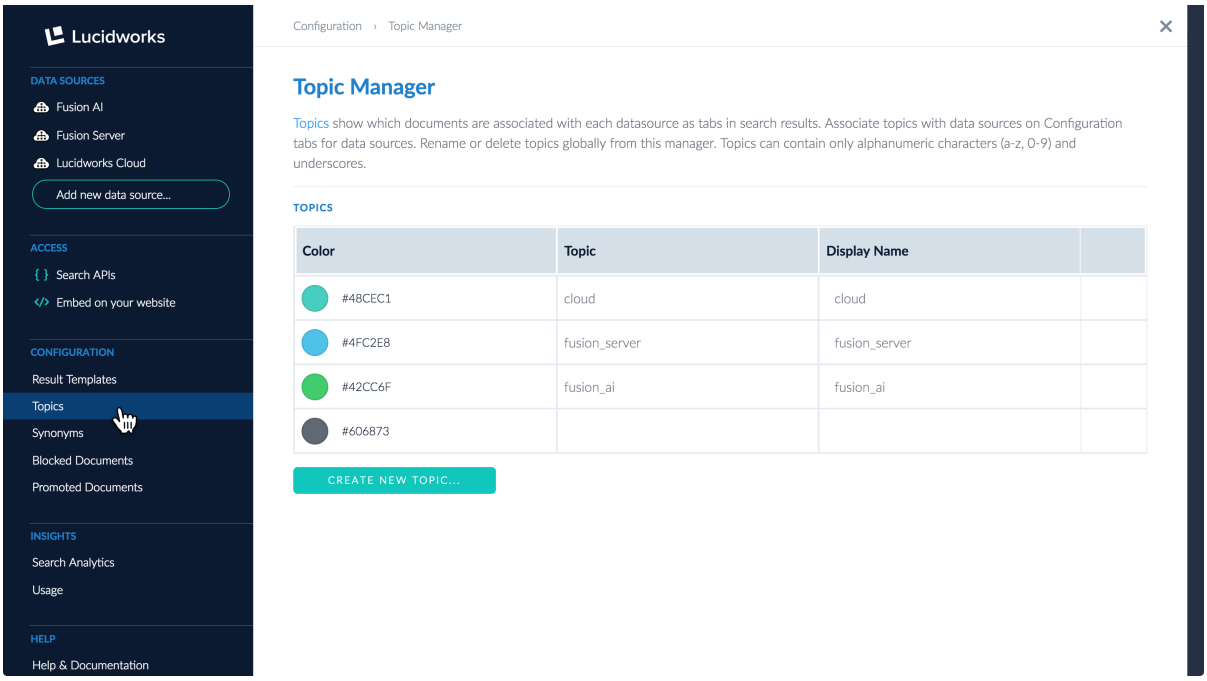
- **Page Builder** – The Page Builder is the main part of the Admin UI. It is where you configure all aspects of Site Search. From the menu on the left, choose what you want to configure. Hover over the page to the right to reveal controls for configuring modules.

  This is the Page Builder:



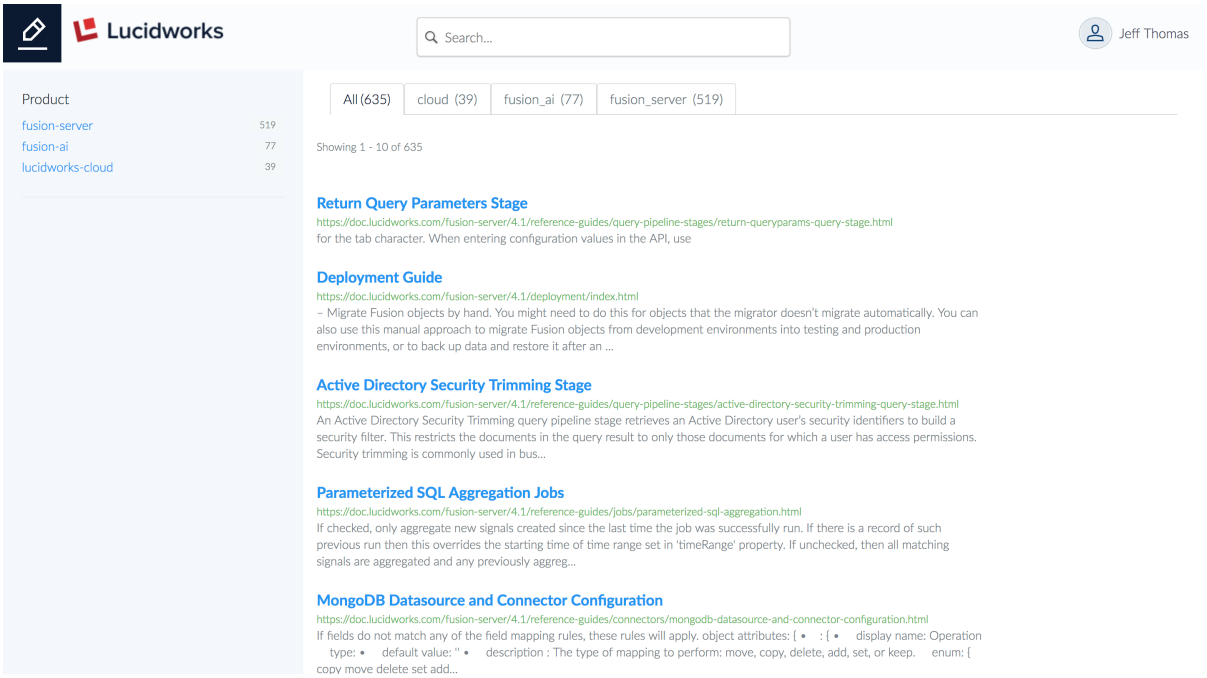
- **Slide-out panels** – When you choose an aspect to configure, a panel slides out over the Page Builder.

  This is an example of a slide-out panel:



- **Search** – This part of the UI hides the menu and the Page Builder. You can test searches here or in the Page Builder. The search results are identical.

  This is the Search page:



Navigation and configuration

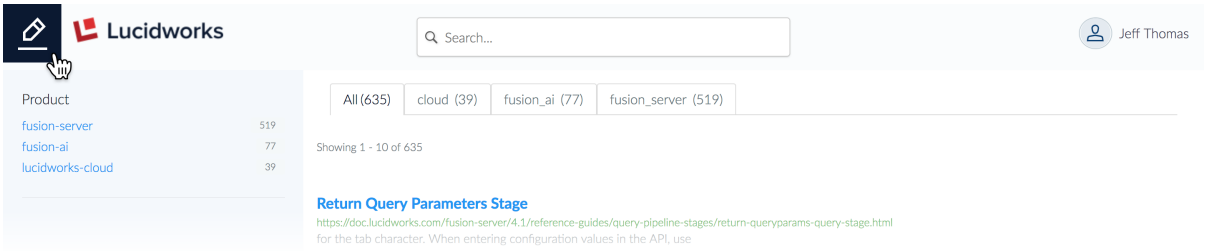
Here we explain how to navigate in the Admin UI and to configure Site Search.

Open the Page Builder

When you open Site Search, it opens with the Page Builder open and the main menu visible. If no data source has been configured, the slide-out panel for adding a data source opens.

How to Open the Page Builder from Search

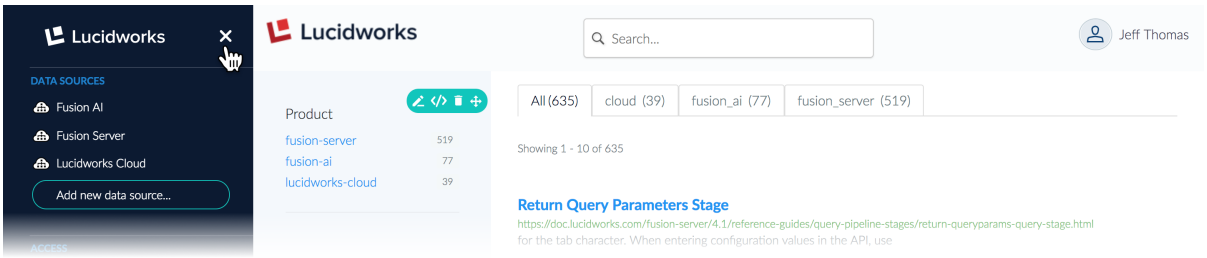
In the upper left corner, click .



Open Search

How to open Search

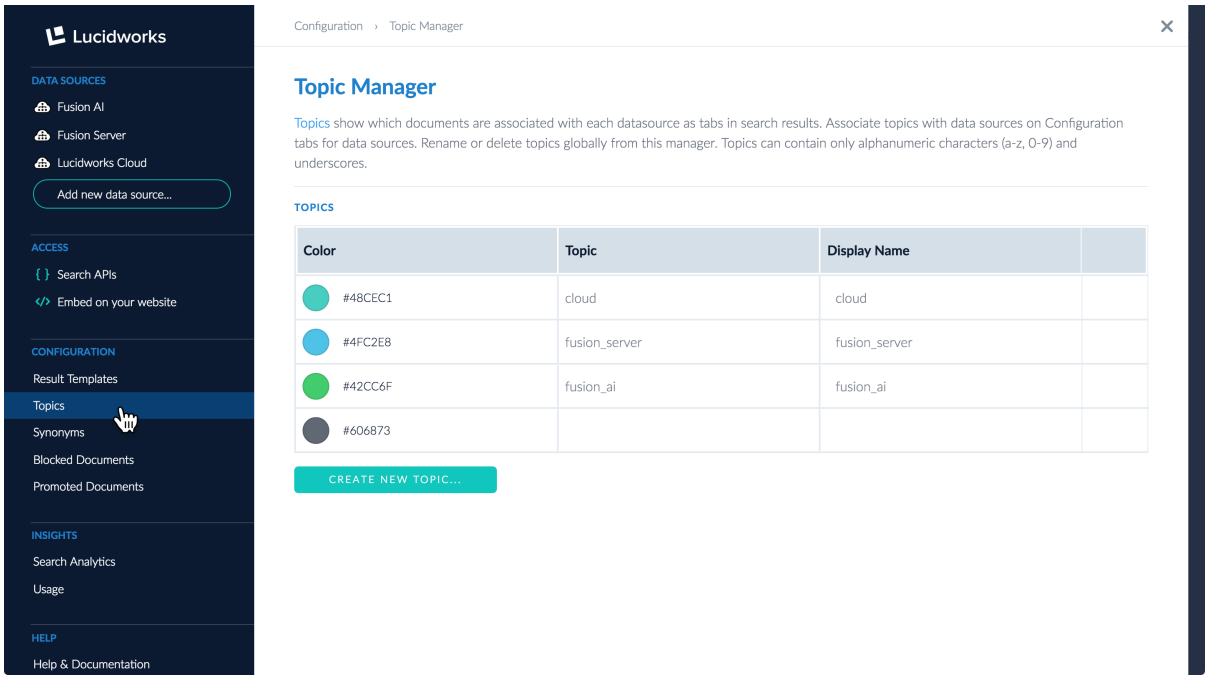
At the top of the menu, click Close .



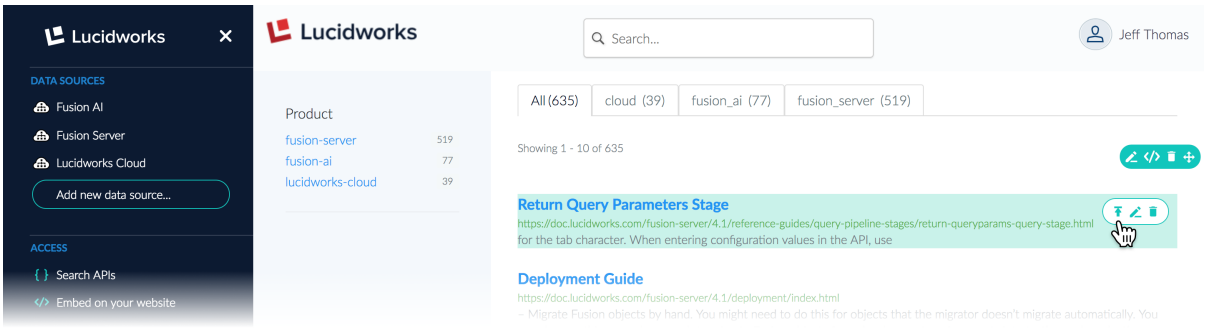
Configure Site Search

Configure Site Search:

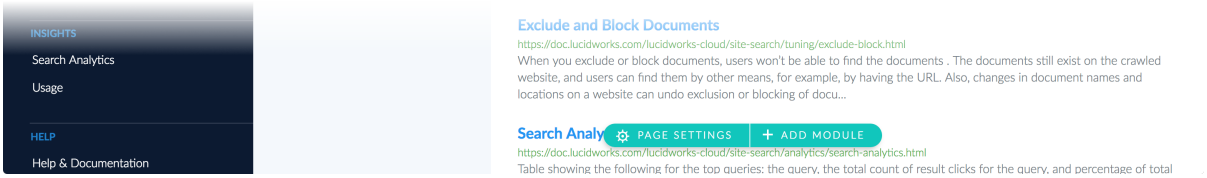
- **From the Page Builder menu, in slide-out panels** – Select items from the main menu to configure those aspects of Site Search. Configuration panels slide out.



- **With controls on the Page Builder** – Hover over parts of the Page Builder to reveal controls:



At the bottom of the Page Builder are controls for page settings and adding modules:



Sessions

When you sign in to Lucidworks Cloud, it stores a session cookie. You can open and use Site Search apps without providing per-app credentials. You are logged in as a specific account owner or administrator. On the dashboard, you can only see the apps to which you have access.

If you sign out, either from the dashboard or Site Search (these are identical), then the next time you open the dashboard or a Site Search app, you must log in again.

If you exit your browser, then you are signed out. You will need to sign in again the next time you use the dashboard or a Site Search app.

The dashboard and Site Search apps have no idle-time based session sign-out. You can continue to use the dashboard and Site Search apps for as long as you are logged in.

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Tutorials

- Index and Search

This tutorial will guide you through some basic Site Search tasks with step-by-step instructions.

Index and Search

The Index and Search tutorial takes you from opening a new Site Search app to searching in a few easy steps. The tutorial acquaints you with:

- The Site Search Admin UI
- Creating a Web Crawler data source and indexing data from the data source
- Searching

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        - Style Modules with CSS
    - Tune Searches
        - Topics
        - Synonyms
        - Spellcheck and Did You Mean
        - Suggestions
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    - Use Language Features
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        - Search Analytics
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        - Generate Signals

Index and Search

- 1. Open a trial Site Search app or add one
    - 1.1. Open a trial app
    - 1.2. Add a trial app
- 2. Add a Web Crawler data source
- 3. Add a More Like This module
- 4. Configure facets
- 5. Exclude directories
- 6. Search
- 7. Additional reading

In this Site Search tutorial, you will:

1. Open a trial Site Search app, if one already exists. If no trial app exists, then create it.
2. Add a Web Crawler data source and index data.
3. Search.

1. Open a trial Site Search app or add one

Open a trial Site Search app, if one already exists. If a trial app doesn't exist, add one.

For this tutorial, we assume that this is the first time the app is opened.

1.1. Open a trial app

When Lucidworks first creates your Lucidworks Cloud account, you get one app out of the box, named "Site Search". You can use that app for this tutorial.

If your account has one or more licensed apps, you can add a trial app to use for this tutorial.

How to open a trial app

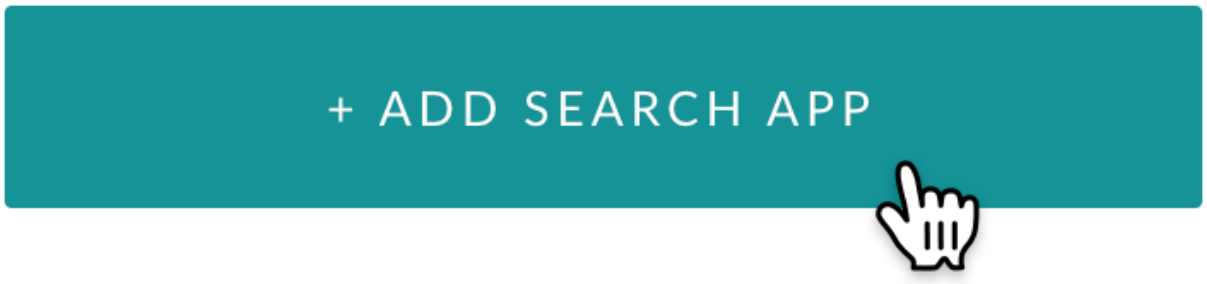
In the dashboard, click **Open** for an app that mentions the trial period.

1.2. Add a trial app

Add a trial Site Search app to use for this tutorial.

How to create a new app

1. Open your dashboard at https://lucidworks.cloud/dashboard.
2. Click **Add Search App**.



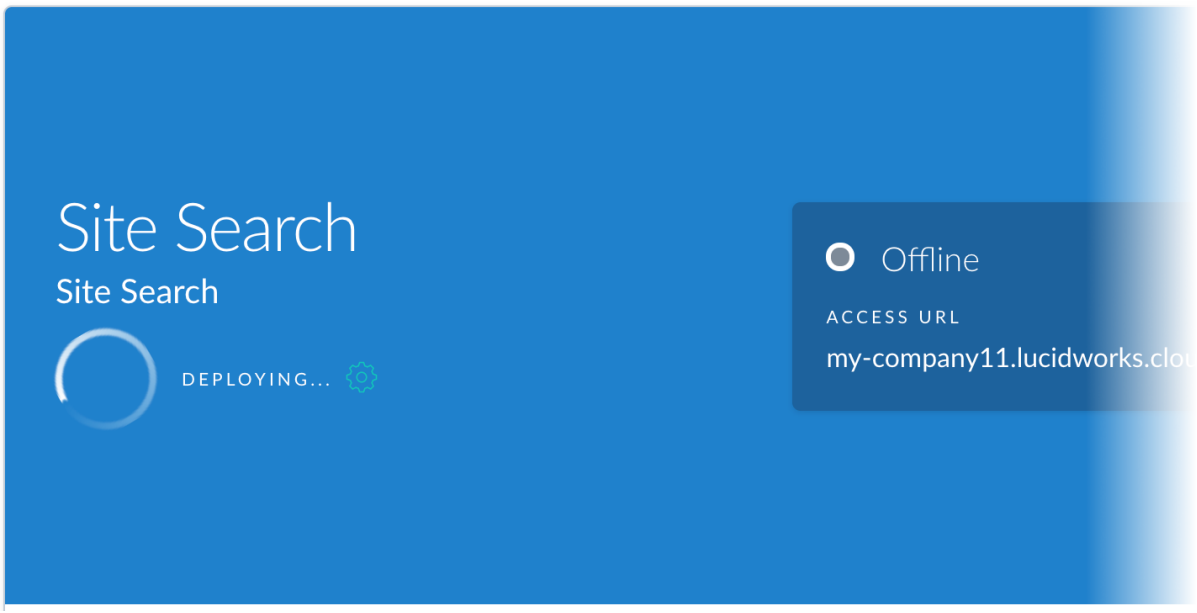
3. Customize the path to the new app.

   This path is appended to your domain name, as in `https://subdomain.lucidworks.cloud/pathname`.

   For example, you could choose `https://subdomain.lucidworks.cloud/intranet`, `https://subdomain.lucidworks.cloud/customers`, `https://subdomain.lucidworks.cloud/archive`, and so on.

4. Click **Create New App**.

   This returns you to the dashboard, where your app is shown as "Deploying":

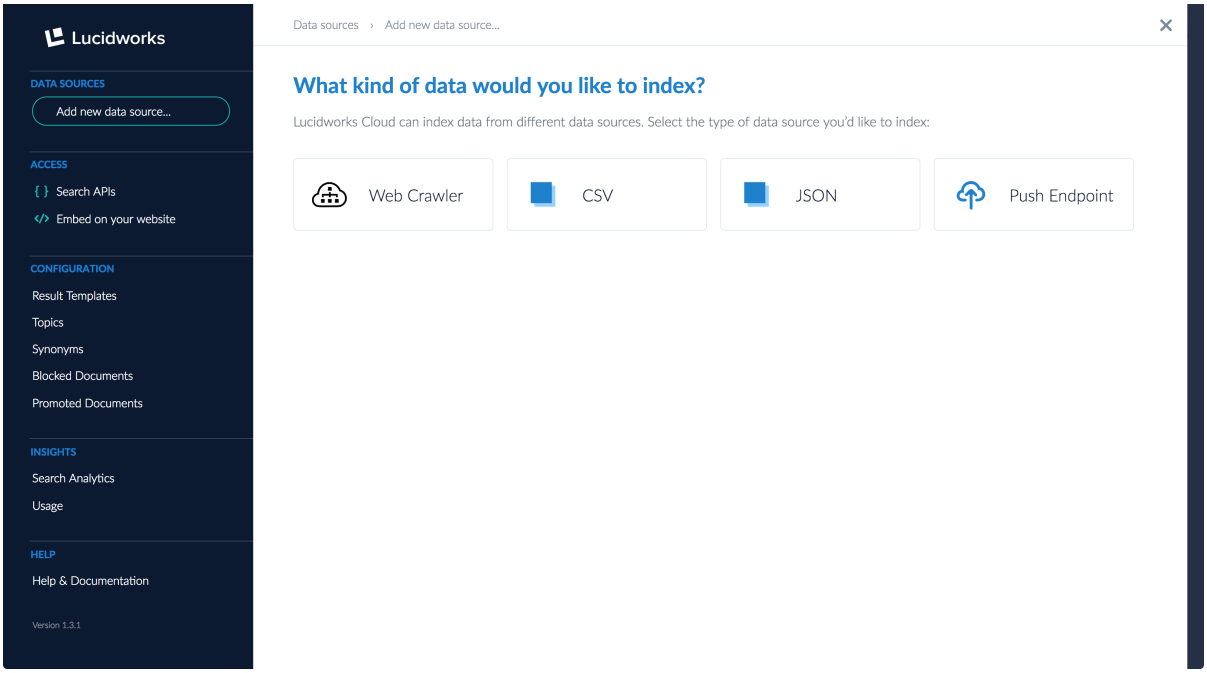


   Deployment takes a few minutes. When the new app is ready, an **Open** button appears.

5. Open the app you just added. In the Lucidworks Cloud dashboard, click **Open** for that app.

2. Add a Web Crawler data source

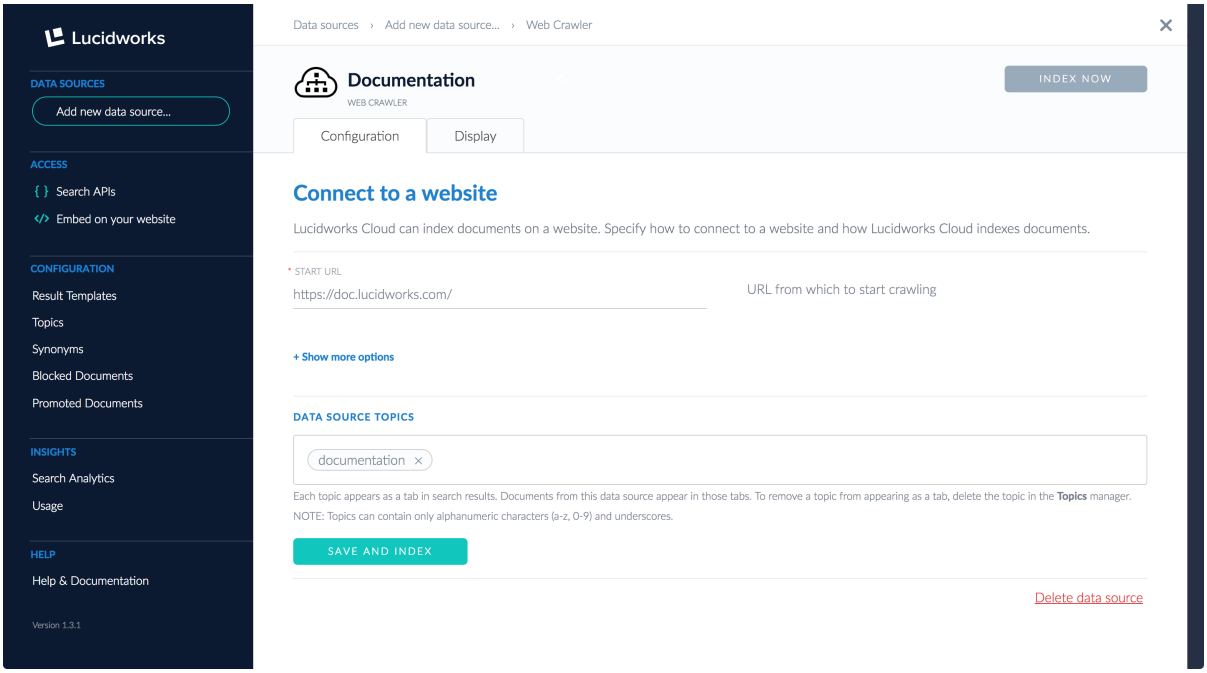
The first time you open the Admin UI for a Site Search app, the Page Builder is open. You see a slide-out panel for adding a data source:



Add a Web Crawler data source. Site Search will crawl the documents on the website and produce a searchable index for the website.

How to add a data source to index a website

1. In the Site Search menu, click **Add new data source**, and then click **Web crawler**. If you are adding the first data source, just click **Web crawler**.
2. On the Configuration tab, specify which website to crawl and which documents to index. For this tutorial, you will index documents on the Lucidworks Documentation website. You could also repeat these tasks with a website of your own choosing.
    a. Edit the name of the data source. At the top of the page, click the large word `Web Crawler` and enter `Documentation`.
    b. Enter the **Start URL** `https://doc.lucidworks.com/`.
    c. In **Data Source Topics**, enter the topic `documentation`. In Topic Tabs modules, topics separate search results by data source.



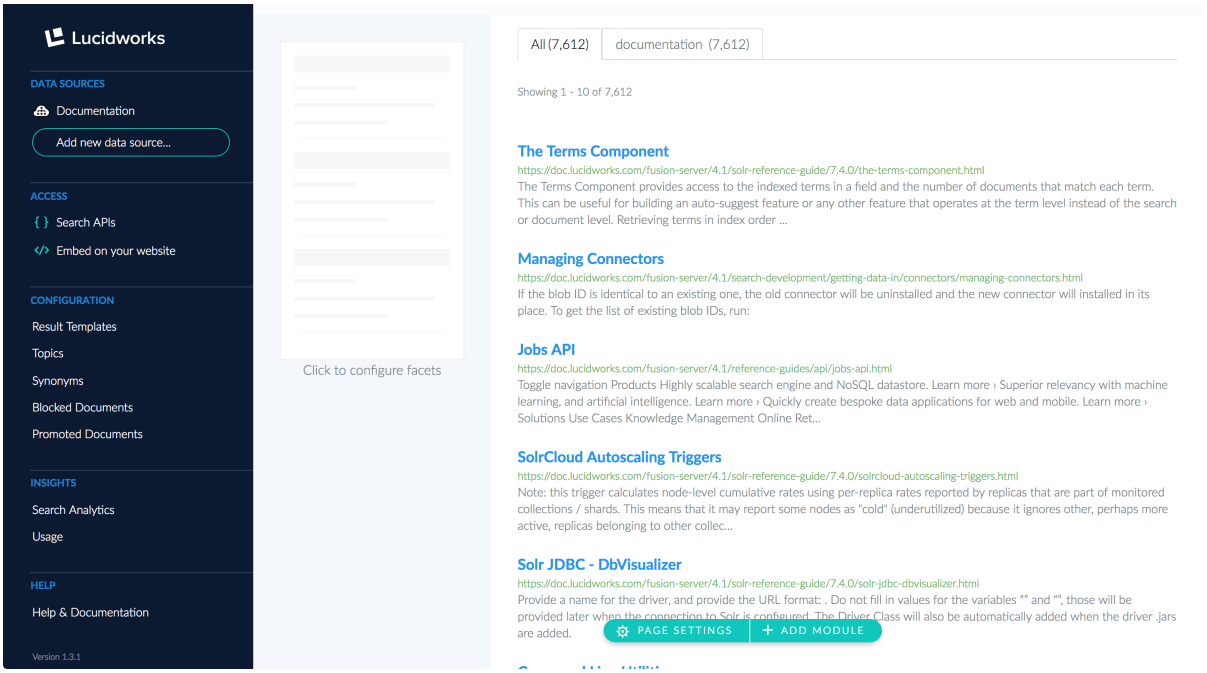
d. Click **Save and Index**. Site Search saves the data source definition, connects to the data source, and indexes documents.

   At the top of the page, you'll see "Connecting..." followed by "Connected." In the bottom left corner, you'll see status messages about the number of documents indexed.

Tip	You might need to refresh the page in the browser to see all of the documents that were found in the crawl.

e. When the status messages stop and the Activity section disappears, click Close ✖ to close the slide-out panel for configuring a data source.

   You are now in the Page Builder.



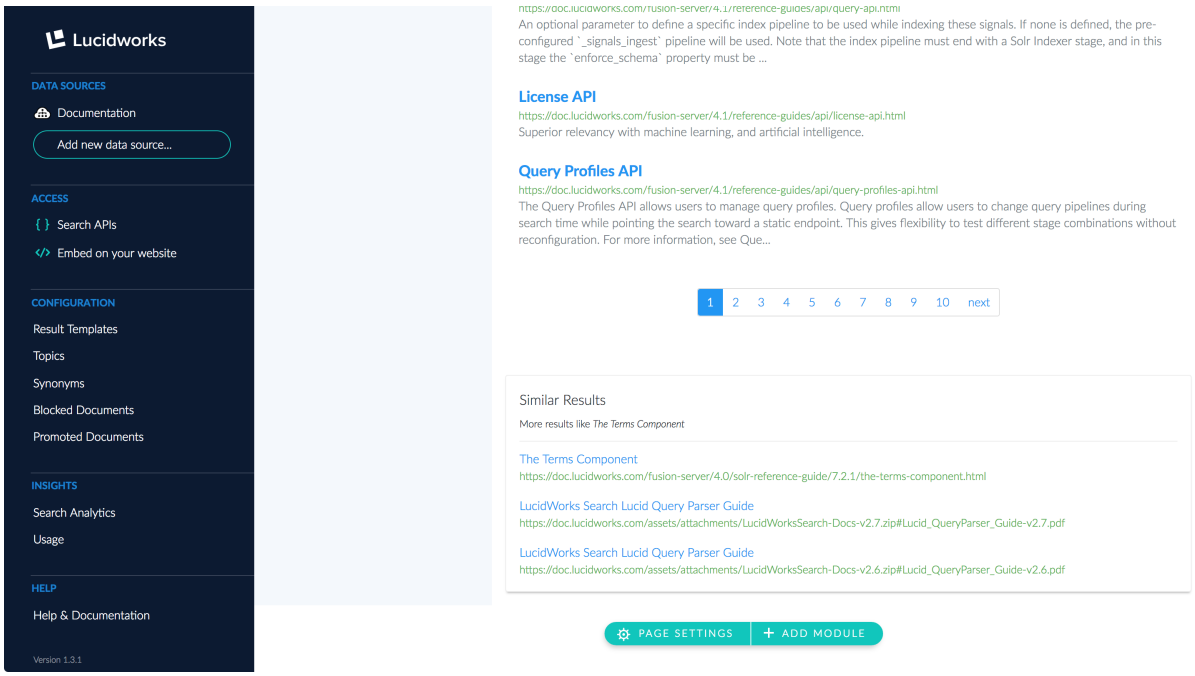
3. Add a More Like This module

The Page Builder already has the modules Search Box, Topic Tabs, Results, and Facets.

Add a More Like This module to the page:

How to add a More Like This module

1. In the Page Builder, scroll to the bottom of the page.
2. At the bottom of the page, click + ADD MODULE.
3. Click the **More Like This** tile and drag it to the bottom of the page. A gray box appears. Drop the module in the box.

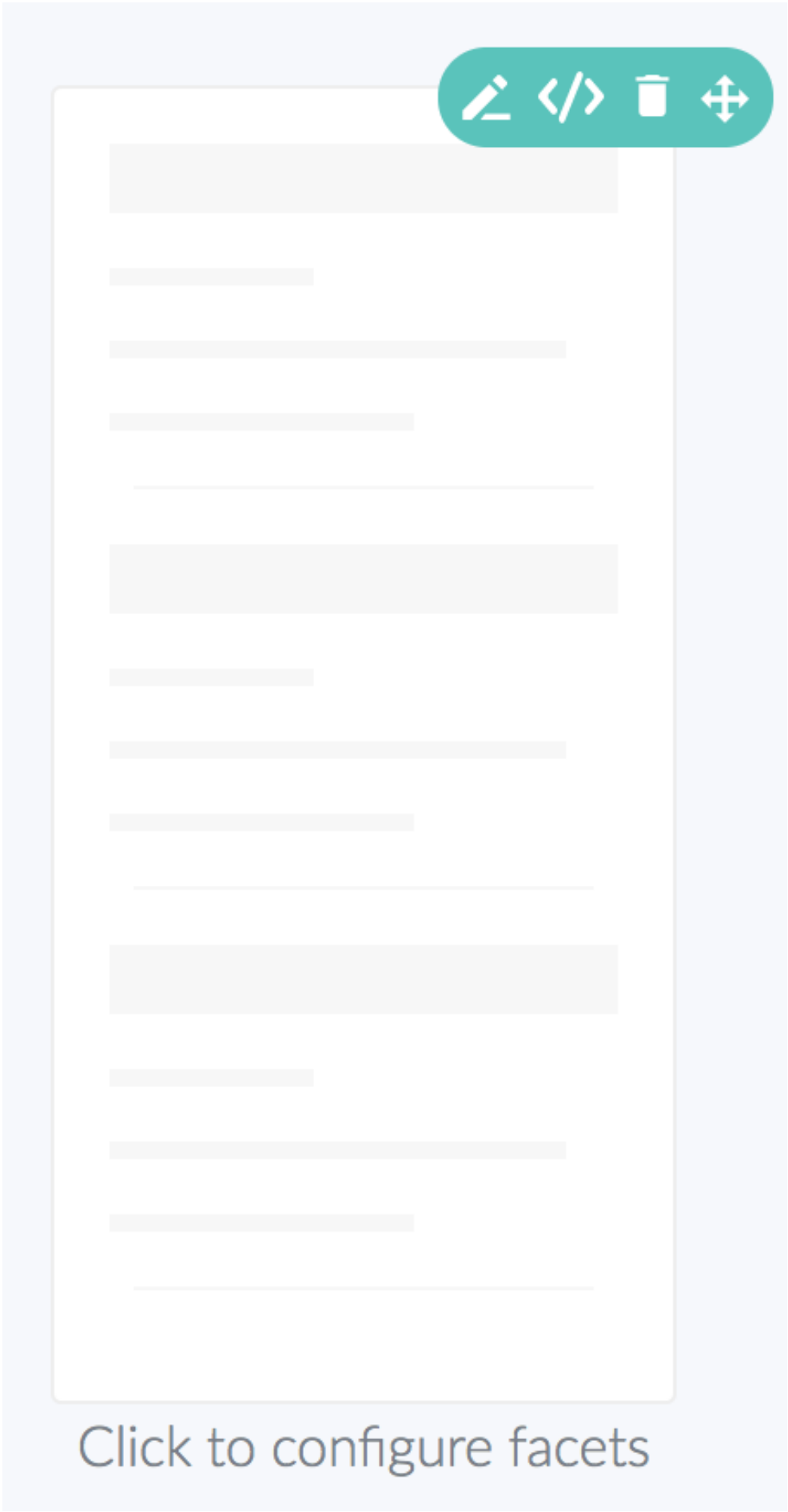


4. Configure facets

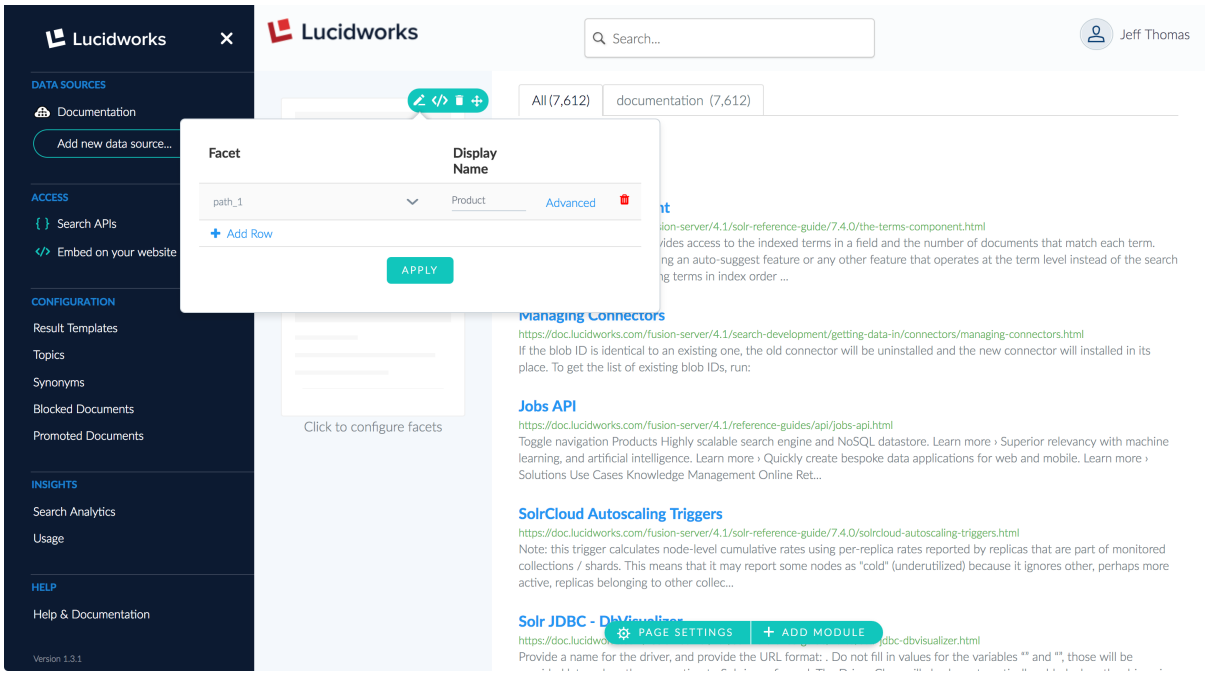
Configure facets to let the user more easily navigate categories of search results.

How to configure facets

1. In the Page Builder, scroll to the top of the page.
2. Hover over the Facets module, and then click , or just click this image, which is present when facets haven't been configured:

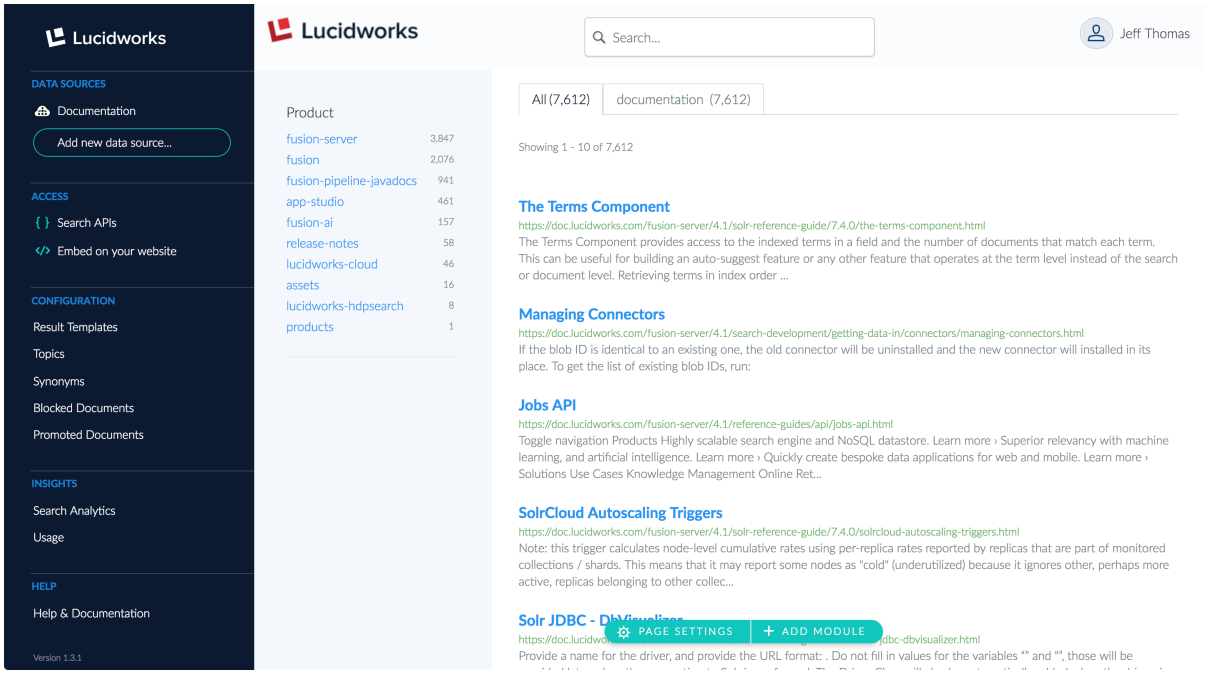

Click to configure facets

3. For the first facet, click the ⌄, and then select `path_1`. Under **Display Name**, enter `Product`.



4. Click **Apply**.

   The facets for the field `path_1` appear.



5. Exclude directories

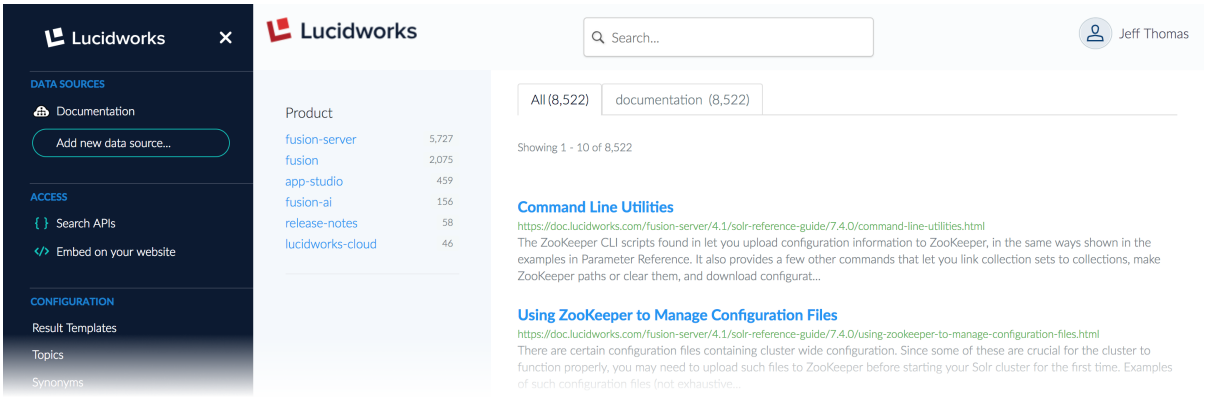
Among the facets, you see directories that aren't needed in this search app, such as `fusion-pipeline-javadocs` and `assets`. We'll exclude them now.

In the menu, click the data source **Documentation**.

1. Expand **Show more options**.
2. Under **Exclude Documents**, enter strings for directories and files you want to exclude. Use these strings, which exclude the named directories at the top level and PDF files:

```
fusion-pipeline-javadocs/*
assets/*
lucidworks-hdpsearch/*
products/*
*.pdf
```

3. Click **Save and Index**.
4. Monitor the status messages under **Activity**. When they cease, all documents have been indexed.
5. Click Close ✖ to close the slide-out panel for configuring a data source.
6. Notice that the facets no longer include the directories that you excluded.

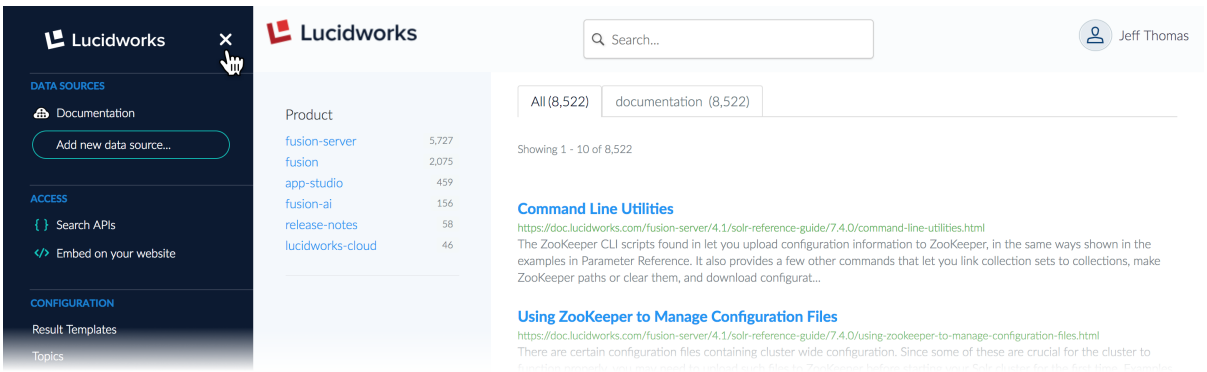


6. Search

Now you can search for documents. You can search from the Page Builder, or you can close the Page Builder and search from the Search interface.

How to open Search

At the top of the menu, click Close ✖.



Search for some documents.

7. Additional reading

- Tour the Admin UI.
- Develop search apps.
- Index data sources.
- Search.

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Develop a Site Search App

Develop a Site Search app to make search available to your users.

1. Starting with the basics, data sources and page design, you develop the search functionality of the app.
2. Moving beyond the basics, you can tune the search functionality with topics, synonyms, spellchecking and Did You Mean, blocked documents, and promoted documents.
3. You can localize search apps in the supported languages.
4. You can embed Site Search modules in your websites and/or use the Site Search REST API to make Site Search capabilities available in other apps.
5. You can use cascading style sheets (CSS) to style modules.

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Workflow

This article gives an overview of how to use Site Search to develop a search app and embeddable search modules.

Information follows below about the basic workflow and a detailed overview of steps for creating a Site Search app and embeddable modules.

Basic workflow using embeddable modules

This is how you develop Site Search apps and embeddable modules:

1. **Open a Site Search app** – In Lucidworks Cloud, one Site Search app is created for you. You are an administrator of that app.
2. **Add data sources and index your data** – Create data sources for the website, CSV file, JSON file, and/or pushed JSON files that you want to index.
3. **Configure modules in the Admin UI** – Configure modules to specify details such as whether there are breadcrumbs and the number of results per page.
4. **Embed Site Search modules in your websites**. The embedded Site Search modules connect to the back end of your Site Search app, which is hosted in Lucidworks Cloud.

   At present, embeddable modules include ones for search boxes, facets, search results, more like this results, and topic tabs.

   Users can now access Site Search functionality directly from your websites.

5. **Tune search results** – Before embedding modules (by working in the Admin UI) or after embedding modules, you can tune search results so they meet users' needs.

Detailed overview of steps using embedded modules

Search app development is point-and-click and drag-and-drop. It is no-code development. The embedded modules are code, but all you do is copy them from the Site Search app and paste them into your website. Optionally, you can use CSS (cascading style sheets) to customize the appearance of embedded modules.

How to use Site Search to develop a search app

1. **Sign in to Lucidworks Cloud** – Log in as a user with the Admin or Owner role.
2. **Open a Site Search app** – From the Lucidworks Cloud dashboard, click **Open** for the search app you want to open. Alternatively, open the app's URL in a browser.

   When you first open an app, you are in the Page Builder and the Site Search menu is present. To open the Site Search menu at other times, click in the upper left corner of Site Search.

3. **Add and configure one or more data sources from which to index data** – Each search app can search multiple data sources of the same or different types.
4. **Exclude documents** – Excluding documents lets you omit them from the index.
5. **Design the Search page and configure modules** – Brand your app and design the contents and appearance of result lists.
   a. **Edit result templates** – Result templates control the *content* (which fields are present) and *appearance* of the result lists.
   b. **Lay out the Search page** – Page settings control the column layout of the Search page.
   c. **Brand your Admin UI with a logo** – Page settings let you brand your Admin UI with your own logo.
   d. **Add modules** – Modules are the UI components that let users search, that display search results, and that let users interact with search results (for example, by using facets).

e. **Configure modules** – Configuration settings differ by module. For example, in a Facet module, you can specify the facet field or fields, display names, and advanced options.

6. **Embed modules** – Embed Site Search modules in your websites.
7. **Style modules** – Use cascading style sheets (CSS) to style modules.
8. **Tune searches** – Tune the search results that users get to improve their relevance.
    a. **Manage topics** – Topics are strings that you can associate with data sources. Users can browse topics within search results. You can restrict search results to specific topics.
    b. **Manage synonyms** – Synonyms are alternative search terms. For example, by making `vacation` and `holiday` interchangeable synonyms, then a search for one will find documents that match the other.
    c. **Block documents** – Blocking documents omits them from search results for all search queries.
    d. **Promote documents** – Promote documents for specific search queries so that they appear at the top of search results.
9. **Use language features** – Site Search supports multiple languages. To develop a search app in a language other than English, use Site Search's language features, including language detection, lemmatization and stemming, language-based boosting, and localization of the UI language of modules.
10. **Close the Site Search menu** – When you have finished app-development tasks, close the Site Search menu. If a configuration panel is present, click Close ✖. Then click Close ✖.

API development workflow

If you use Site Search APIs to develop a search app, the basic workflow is similar to the workflow when using embedded modules to develop an app, but instead of embedding modules you will write code that calls Site Search APIs.

Some tuning of search results in the Admin UI affects the results that users obtain through the Site Search APIs; specifically topics, synonyms, blocked documents, and promoted documents.

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Index Data Sources

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- File size limits
- Map fields
- Add and Configure Data Sources
- Change the Configuration of a Data Source
- Delete a Data Source
- Data sources and change
    - Web crawler data sources
    - CSV and JSON data sources
        - Manage record deletions in CSV and JSON files
    - Push Endpoint data sources

Note	If you haven't read the introduction in the Site Search Guide, we recommend that you do.

A Site Search app indexes data sources and provides a user interface in which users can search and interact with search results. You can also embed code for Site Search modules in your websites.

One Site Search app can search one or more data sources of the same type or of different types.

Data source types

Site Search supports these types of data sources:

- **Web crawler** – Index web pages on a website that is on the public Web.
- **CSV** – Index a comma-separated value (CSV) file. The delimiter can be a comma or tab.
- **JSON** – Index a JSON file.
- **Push Endpoint** – Index data sent to a push endpoint.

File size limits

Site Search data sources have the following file size limits. Site Search doesn't index files larger than these limits.

Data source type	**File size limit**
Web crawler	50 MB

Data source type	File size limit
CSV	50 MB
JSON	50 MB
Push Endpoint	5 MB

Map fields

Mapping fields is a step in configuring data sources. This is background information. You will map fields when configuring datasources.

For each type of data source, Site Search uses fields with specific names to display parts of the data in the result list. Here are some examples:

Field	Data sources	Description
`name`	All	Element in the result list that serves as a title for the result
`description`	All	Longer text content To use the More Like This smart panel, your data source must have a `description` field, or you must map a different field to `description`.
`url`	Web crawler and Push Endpoint	A URL that the `name` links to
`id`	All	An identifier for a specific record
==========	Note	For a Push Endpoint data source, the `id` field must be a string field.

If your data sources have different names than those that Site Search uses, you must map any fields you want to appear in results from the native data source field names to the names that Site Search uses.

Other fields can appear in the results too, but they won't get special treatment in result templates, for example, different font sizes or links.

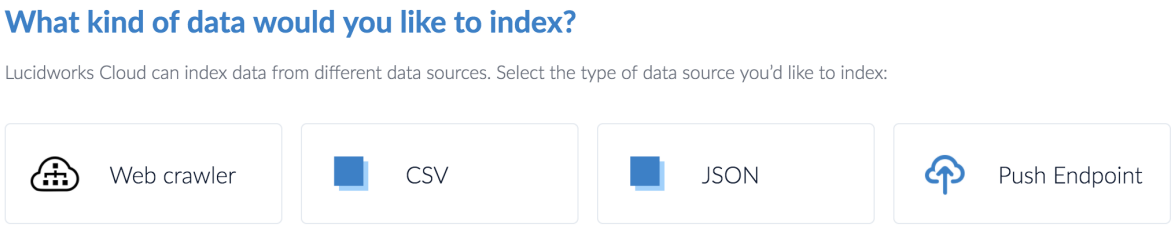
Add and Configure Data Sources

Note	We assume that you (or someone else) has already created an Site Search app, and that you have opened the app. You must have the role Admin or Owner.

Add and configure the data sources that your app uses.

How to add and configure data sources

1. **Open the Site Search menu** – In the upper left corner of Site Search, click .
2. **Add and configure data sources from which to index data** – One search app can search one or more data sources of the same type or of different types.

   Here are detailed steps for each of the data source types:

   - Web crawler
   - CSV file
   - JSON file
   - Push Endpoint

Note	You can add and configure additional data sources while other data sources are still indexing documents.

Change the Configuration of a Data Source

You might need to change the configuration of a data source, for example, if the source of data changes.

How to change the configuration of a data source

1. In the Site Search menu, click a data source.
2. Use the tabbed wizard to configure the data source. For details, see Add and Configure Data Sources.
3. Save your changes. In some cases, Site Search will re-index the documents. Click the button at the bottom of the page (**Save** or **Save and Index**).

   Save saves your configuration changes. **Save and Index** saves your configuration changes and indexes (crawls) the data source. *Don't* click **Crawl Now** in the upper-right corner; that will index the data source now, but *without* saving your changes.

Delete a Data Source

Delete a data source that you no longer want to supply data to your search app.

Deleting a data source removes the data source configuration in Site Search and the index that was built from the data source. It doesn't delete the files, web pages, and so on that Site Search crawled.

How to delete a data source

1. In the Site Search menu, click the data source you want to delete.
2. In the right pane, scroll to the bottom and click Delete data source .
3. Click **Yes, Delete** to confirm that you want to delete the data source.

Data sources and change

Users that search using Site Search modules or the Site Search app expect to search results to be current. Here we explain how to ensure this for different types of data sources.

Web crawler data sources

Site Search periodically re-indexes Web crawler data sources so that search results are current:

- For trial apps, the re-indexing frequency is every 24 hours.
- For licensed apps, your contract determines the re-indexing frequency.
- You can re-index a Web crawler data source at need, for example, if there is some urgent need to index new documents.

CSV and JSON data sources

Important	If you plan to upload data from a CSV or JSON file more than one time, and you want Site Search to handle the changes, then you must have an `id` field in the file, or map a field in the file to `id`. Doing so lets Site Search identify records. If you don't do this, uploading the file again just adds all of the records again (unless you delete and recreate the data source first).

The `id` field must be a string field.

Here, we describe how records are handled during the first file upload (when you create a data source) and during subsequent file uploads.

Records with unique IDs

With an `id` field or field mapped to `id`, this is the behavior for CSV and JSON data sources that have unique IDs:

On the first upload, all records get entries in the index.

For subsequent uploads of the same file:

- **Added records** – Site Search adds entries for the new records to the index.

- **Updated records** – Site Search updates the existing entries in the index.
- **Deleted records** – Site Search *doesn't* delete entries from the index for the deleted records. The entries will still appear in search results. See Manage record deletions in CSV and JSON files for strategies to manage record deletions from CSV and JSON files.

Records with nonunique IDs or no IDs; retain all records

Proceed as follows to index a CSV or JSON file that contains records with nonunique IDs (possibly multiple records for the same ID) or no ID field, when the goal is to retain all records:

- **With no ID or ID field is not named `id`** – If the file doesn't contain a field named `id`, don't map a field to `id`. Upload the file a single time (when you create the data source). Site search will index all records. Don't upload the file again. If that is necessary, delete and recreate the data source.
- **With `id` field** – If the file contains a field named `id`, map the field to some other name.

In both cases, upload the file a single time (when you create the data source). Site search will index all records. Don't upload the file again. If records in the file change and you want to update entries in the index, then delete and recreate the data source.

Records with nonunique IDs; retain only a single record

Important	Index updates for records with nonunique IDs take the *first record* during both the initial file upload and subsequent uploads of the same file.

Proceed as follows to index a CSV or JSON file that contains records with nonunique IDs (possibly multiple records for the same ID), when the goal is to retain a single record:

- **With ID field not named `id`** – If the file doesn't contain a field named `id`, map the ID field to `id`. Upload the file a single time (when you create the data source). Site search will index all records. Don't upload the file again. If that is necessary, delete and recreate the data source.
- **With `id` field** – No action is necessary.

In both cases, you can upload the file multiple times.

Manage record deletions in CSV and JSON files

To ensure that previously uploaded records that are no longer in files don't appear in search results, you can:

- **Block documents** – You can search for and block documents that have been deleted from the source files.
- **Delete and recreate the data source** – To remove all deleted documents en masse, delete and recreate that data source. With this approach, search results for the data source are briefly unavailable. Changing the source file to a different file isn't sufficient.

Push Endpoint data sources

For Push Endpoint data sources, you manage change as follows:

- **Add documents** (singly or in batches) – Push documents with new `id` fields. Site Search adds the new records to the index.

- **Update documents** (singly or in batches) – Push documents with existing `id` fields. Site Search updates the existing records in the index.
- **Delete documents** (one at a time) – Delete one document at a time. Site Search delete the records from the index. Reference the documents by appending the value of the document's `id` field to the end of the Push Endpoint URL, for example:

  Syntax showing the push endpoint and the document ID:

  ```
  https://subdomain.lucidworks.cloud/pathname/api/v1/push/endpoint/id
  ```

  Example URL showing the push endpoint and the document ID:

```
https://my-corp.lucidworks.cloud/fusion-search/api/v1/push/push-endpoint-prod/Rec100
```

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Toggle navigation

*

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Web Crawler

- Supported websites
- Add a Web crawler data source
- If Web crawler data sources overlap

- Troubleshooting Web crawler data sources
  - Connection errors
  - Indexing speed
  - Content is not what was expected
  - Little or no content is indexed

For a Web crawler data source, Site Search indexes a website (possibly following links outside of the website).

Site Search indexes the website periodically. You can also re-index the website at need.

Supported websites

Site Search can crawl these websites:

- **Public Web** – Websites must be on the public Web (Internet). They can't be behind firewalls.
- **Server-side rendering** – Site Search can search websites for which rendering of page content is server-side rendering. Client-side rendering (using JavaScript in browsers) isn't supported. Crawling a website that uses client-side rendering indexes a single document, possibly without content.

Add a Web crawler data source

How to add a data source to index a website

1. In the Site Search menu, click **Add new data source**, and then click **Web crawler**. If you are adding the first data source, just click **Web crawler**.
2. On the Configuration tab, specify which website to crawl and which documents to index. Expand **Show more options** to see all of the options:

Setting	Description
Start URL	URL from which Site Search starts crawling (indexing) a website. Specify the URI scheme (`http` or `https`), `://`, and the path, for example, `https://www.mycompany.com/`. The path must include the fully qualified domain name (for example, `www.mycompany.com` and can extend to a lower level, for example, `www.mcompany.com/news/`. The trailing slash is optional. The path might include a file name, for example, `www.mycompany.com/index.html`.

a| Note

```
|There are two things to note about the URL. First, Site Search must be able to connect to it. If you
enter the URL in a browser and get the HTTP error 404 Not Found, then Site Search won't be able to connect
to that URL. This is frequently the case if the directory is an intermediate one in a longer path, and if
it doesn't contain an `index.html` page. To work around this, choose a directory higher up in the path or
the domain level, and use exclusion criteria to omit other directories and files. Second, if a website URL
contains a file name as the final part of the path, then _don't_ choose "Pages beginning with the Start
URL" as the value of "Pages to include".
```

a| Pages to include

```
 a|
Site Search can use one of these strategies regarding links on a website:
```

- **All pages linked to by this site** – Follow *all* links on the website. This can result in indexing web pages that are off-site.
- **Pages on this site and subdomains** (default) – Follow links that lead to other pages on the website or on subdomains. Don't follow links that lead offsite.
- **Pages beginning with the Start URL** – Follow links that lead to other pages on the website. Don't follow links across subdomains or that lead offsite. Page URLs must start with the website URL that you entered at the top of the Configuration tab.

a| Respect refresh redirection

```
 a|
Allow Site Search to follow meta redirects.
```

a| Limit crawl to # levels deep

```
 a|
Maximum number of levels to crawl in linked web pages, or to follow in the site map hierarchy
```

a| Limit crawl to # documents

```
 a|
Maximum number of documents to index
```

a| Site map URL

```
 a|
(Optional) If specified, Site Search uses the hierarchy in the site map to determine which web pages to crawl,
instead of following links. Site maps must be XML files that adhere to the
https://www.sitemaps.org/protocol.html[Sitemap protocol].
```

a| Maximum file size

```
 a|
Files above this maximum size aren't indexed.
```

The largest maximum file size you can specify is 50 MB. The Web crawler data source doesn't support indexing files that exceed 50 MB.

a| Exclude documents

```
 a|
Documents to exclude from the index. Specify exclusion criteria, that is, a series of strings to match against
the parts of document URLs _after the domain name_ (not after the full path specified in Start URL). You can
use the wildcard `*` (asterisk) to match any number of characters, so a single exclusion criterion can exclude
multiple directories or files. How matching is done and what you should specify here depend on your selection
for "Pages to include". For more information and examples, see Exclusion criteria.
```

a| Data Source Topics

```
 a|
Meaningful characterizations of the data from this data source, including the source of the data. A topic can
be applied to one or more data sources, and a data source can have one or more topics. In a Topic Tabs module,
search results are grouped by topic. Searches in Search Box modules and with the Search API can be limited by
topic or topics.
```

3. Click **Save and Index**. + While Site Search is crawling a data source, it displays its activity (the number of documents it has indexed) in the lower left corner of the page: +

+

[width="100%",cols="50%,50%",]

Tip
You might need to refresh the page in the browser to see all of the documents that were found in the crawl.
========== 4. After the crawl has begun, specify information on the Display tab (how to index data and display results): + a. (Possibly required) Specify whether to map fields, and how to map them: + [cols=",",options="header",]
==========
Setting
Description
Map fields

Select this to map field names from the data source to other field names. For more information about mapping fields, see Mapping fields.
Source Field Name
Field name from the data source
Target Field Name
A different field name that you want to use in the search app
Result Template (menu to the left of Edit Template)
Choose a result template to use.

========== ========== ========== b. (Optional) Choose a result template. Site Search has already chosen the best result template based on your data source, which is shown in the dropdown next to Edit Template. If you want to choose a different result template, you can. c. (Optional) Click **Edit Template** to edit the result template. 5. If you have modified anything on the Display tab, click **Save** to save your changes.

== If Web crawler data sources overlap

We recommend that you *not* create Web crawler data sources that overlap. A specific document appears in the index only one time. If two (or more) Web crawler data sources crawl the same document, then it will be re-associated with each last-crawled data source.

Examples of overlapping data sources are:

* Creating separate data sources for `https://my.company.com/products` (topic `products`) and `https://my.company.com/products/zap` (topic `zap`). + Zap products would alternately be found under the tab `Products` or the tab `Zap`. * Creating a data source that brings in a set of documents directly and another that brings in the same documents through redirects. For example, the data source `https://my.company.com/store/` (topic `store`) might bring in documents in `https://my.company.com/used` by meta redirects. A second data source `https://my.company.com/used` (topic `used`) would overlap with the first data source. + Used products would alternately be found under the tab `Store` or the tab `Used`. The correct approach to having some documents appear in multiple categories is to use facets.

== Troubleshooting Web crawler data sources

Following are difficulties that you might encounter with Web crawler data sources.

=== Connection errors

Problem – When you click **Save and Index** for a Web crawler data source, the status at the top of the page should change to `Connecting` and then `Connected`, at which point Site Search indexes the data source. If Site Search has difficulty connecting to the data source, the status changes to `Connection error`.

Possible causes of connection errors and what to try:

[cols=",",options="header",]

========== ==========
Possible cause
What to try
Start URL is incorrect
Double-check the URL. Try accessing the website in a browser.

Website is down
Try accessing the website in a browser. If the website is down, index the data source when the website is back up.
Chosen values of `Pages to include` and `Respect refresh redirection` are problematic for this website
Choose different values of these settings to see whether different choices let Site Search connect to the website.

==========

 === Indexing speed

Problem: – Indexing of a Web crawler data source is slow to start, and/or indexing progresses slowly.

Indexing takes the time it takes:

* It takes a little while for Site Search to start indexing pages. * Larger websites take longer to index. * Indexing multiple data sources at the same time causes indexing to take longer.

Regarding the status messages about the number of documents indexed:

* Initial indexing – Site Search reports all documents indexed in batches, for example, 1, 640, 1413, 2069, 2739, etc. * Reindexing – Site Search crawls all of the documents, but only reports the documents that it updates in the index. So, you might see the status <code>Updating… 0 docs</code> for some time. If documents have changed on the website, Site Search increments the status for those. When Site Search finishes indexing the website, the Index Now button turns green again.

 === Content is not what was expected

Crawling the right documents and getting the ones you want in the index can take some research. If the indexed documents don’t match your expectations, then here are some things to try:

* Specify different settings for "Pages to include" – The different "Pages to include" strategies produce different results. You might try them all, to see which works best for a specific website. * Determine whether "Respect refresh redirection" is needed – If the website Site Search is crawling uses meta redirects, then select Respect refresh redirection. * Use a site map – To restrict the documents crawled, you can remove items from the site map used by Site Search.

 === Little or no content is indexed

* Determine where the website is rendered – Site Search supports crawling of content that is rendered on the server side. * Specify the correct Start URL – If you select "Pages beginning with the Start URL" for "Pages to include", specify a Start URL for a domain or directory (the path shouldn’t end with a file name).

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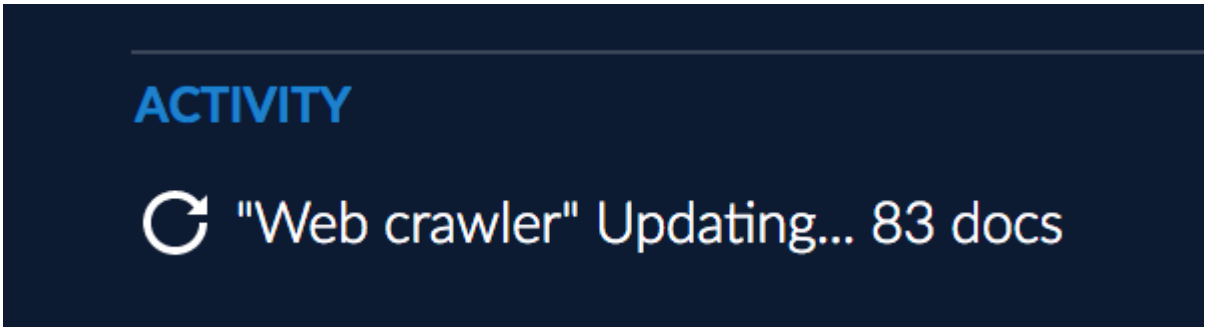
:leveloffset!:

:leveloffset: +3

Toggle navigation

========== ========== ======
Setting
Description
Upload a File
Click in the **Select a local file** text box, browse to a local CSV file, and select the file. Alternatively, click **Upload** and select the file. The maximum file size is 50 MB. CSV data sources don’t index files that exceed 50 MB.
Delimiter
Field delimiter for the CSV file [width="100%",cols="50%,50%",]
Note
Site Search doesn’t support a secondary delimiter or multivalue fields for a CSV data source.
Text Qualifier
In some cases, text strings in a CSV file are surrounded by double quotation marks (" ") or single quotation marks (\' '). Choose the text qualifier here to *remove* the quotation marks from the ingested data.
========== ========== ====== 3. Click **Save and Index**. + While Site Search is crawling a data source, it displays its activity (the number of documents it has indexed) in the lower left corner of the page: +  + [width="100%",cols="50%,50%",]

Tip

You might need to refresh the page in the browser to see all of the documents that were found in the crawl.

==========

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Toggle navigation

<img src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/site/Lucidworks_logo_white.png" format="png" alt="[image Documentation]">

 *

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 = JSON File

For a JSON data source, Site Search indexes records in a JSON file when you create the data source. There is no periodic re-indexing of the file. At need, you can upload the records again. For more information, see CSV and JSON data sources.

How to index a JSON file

1. In the Site Search menu, click Add new data source, and then click JSON. If you are adding the first data source, just click JSON**. 2. Specify information on the Configuration tab (configuration information for the crawler that indexes the data source): + [cols=",",options="header",]

==========

Setting

Description
Upload a File
Click in the **Select a local file** text box or click **Upload**, browse to a local JSON file, and then select the file. Alternatively, click **Upload** and select the file. The maximum file size is 50 MB. JSON data sources don’t index files that exceed 50 MB.
========== ========== 3. Click **Save and Index**. + While Site Search is crawling a data source, it displays its activity (the number of documents it has indexed) in the lower left corner of the page: + + [width="100%",cols="50%,50%",]
Tip
You might need to refresh the page in the browser to see all of the documents that were found in the crawl.

==========

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:leveloffset: 3

:leveloffset: +3

Toggle navigation

<img src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/site/Lucidworks_logo_white.png" format="png" alt="[image Documentation]">

 *

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 = Push Endpoint

* Add a push endpoint * Manage Push API keys Create a Push API key Enter or update a key's comment (description) Delete a key * Sample JSON object or curl command * Push new documents * Update documents * Delete documents

A Push Endpoint data source lets you update specific document records in the index on an ongoing and as-needed basis, instead of (or in addition to) periodically crawling other types of datasources. Records are available to users quickly, within about 15 seconds.

[width="100%",cols="50%,50%",]

Note

The maximum file size of files you can push to a Push Endpoint data source is 5 MB. Push Endpoint data sources don't index files that exceed 5 MB.

==========

 == Add a push endpoint

1. In the Site Search menu, click Add new data source, and then click Push Endpoint. + Site Search sets up the push endpoint for you. 2. (Optional) Change the last part of the push endpoint URI. A push endpoint URI has the following format: + [source,pygments,highlight] ---- https://subdomain.lucidworks.cloud/pathname/api/v1/push/endpoint-name ---- 3. Click Copy to copy the push endpoint URI to the clipboard. Click Copy as Curl to copy a curl command that posts to the URI. The command has a sample JSON payload, which you will need to edit. In particular, notice that: + * It is useful to provide values for the fields <code>id</code>, <code>name</code>, and <code>description</code>, because Site Search knows what to do with those out-of-the-box in the result template for result lists. The <code>id</code> field must be a string field. * You must include the API key that you'll generate in the next step. * A more complete example of the JSON payload is farther down on the page in the section Posting JSON. 4. Click Generate a New Key to generate an API key for the push endpoint. You'll need to include the API key in the POST requests that send JSON documents to the push endpoint. + Your API key is listed. Click Download API key to download a <code>push-api-key.json</code> file that contains the key. Or write the key down or copy it somewhere. It won't be shown again. 5. Under Posting JSON, Site Search displays an example of JSON to post. The fields listed are a superset of fields for all data sources. If you have different fields, you might want to map those fields to these names. Alternatively, when configuring result templates, you can reference your own field names. Click See more fields to see the whole JSON object. + To copy the sample JSON object, hover over it and click Copy. Click Copy as Curl to copy the <code>curl</code> command to post to the push endpoint, with the JSON object as the payload. 6. Click Save. 7. Specify information on the Display tab (how to display results): + a. (Optional) Choose a result template. Site Search has already chosen the best result template based on your data source, which is shown in the dropdown next to Edit Template. If you want to choose a different result template, you can. b. (Optional) Click Edit Template to edit the result template. 8. If you have modified anything on the Display tab, click Save to save your changes.

 == Manage Push API keys

To submit a request to the Push API, an app must include a valid Push API key in an <code>X-API-Key</code> header in the HTTP request.

Manage Push API keys in the Admin UI. Select a Push Endpoint data source to manage Push API keys for that data source. Push API keys are specific to the data source.

 === Create a Push API key

How to create a Push API key

1. In the Site Search menu, click the Push Endpoint data source for which you want to manage Push API keys. 2. Click Generate a New Key to generate an API key for the push endpoint. You'll need to include the API key in the POST requests that send JSON documents to the push endpoint. + Your API key is listed. Click Download API key to download a <code>push-api-key.json</code> file that contains the key. Or write the key down or copy it somewhere. It won't be shown again. 3. Under Posting JSON, Site Search displays an example of JSON to post. The fields listed are a superset of fields for all data sources. If you have different fields, you might want to map those

========== ========== ========== ========== ==========
Approach
Description
Exclude documents (*Web Crawler*)
Omit documents from the index when a web data source is crawled. Site Search omits documents by comparing a series of exclusion criteria (which are regular expressions) with parts of the uniform resource locators (URLs) for the web pages (the path component and the query component). A web page (or other document, such as a CSS file) is excluded if any exclusion criterion matches the compared part of the resource's URL. Exclusion criteria can contain characters that are valid in URLs as well as * (asterisk), which matches zero or more characters. Matching is case sensitive. An excluded document is not in the index, so users won't be able to find the document by searching in embedded Site Search modules or in search apps that use the Site Search APIs. Including previously excluded documents or excluding previously included ones reindexes the data source.
Block documents (*All data sources*)
Omit specific documents one-by-one from search results for all queries. Blocked documents *are* in the index, so blocking a document or unblocking it doesn't necessitate reindexing.
========== ========== ========== ========== ========== [width="100%",cols="50%,50%",]
Important

Excluding and blocking documents are *not* intended to provide data security or privacy. Site Search is intended for use with the public Web. Excluded documents still exist on the indexed website. Users can find the documents by searching on the source websites or by having document URLs. Similarly, blocked documents still exist in the data sources from which they were indexed. Also, changes in document names and locations on a website can undo exclusion or blocking of documents.

==========
==========
==========
==========
==========

For information about blocking documents, see Block documents.

== Exclude documents

Websites consist of files organized in directories. Some of the files and directories might be of interest to search users and others not. You can exclude files and directories that aren't of interest to search users by specifying *exclusion criteria* (which are simple regular expressions) when adding or configuring a data source.

Site Search determines which documents to exclude from the index by comparing the exclusion criteria with parts of the uniform resource locators (URLs) (the path and query components) of all of the web pages and other files (for example, CSS files) that it crawls on the website. Documents for which there are matches are excluded from the index.

=== Workflow

1. Add or configuring a data source without specifying exclusion criteria. Even if you don't intend to keep the facets, it's helpful to add facets for `file_extension`, `domain`, and path segments, for example, `path_1` and `path_2`. This will give you insights into the files present and their organization. 2. Save and index the data source. 3. See what you got. Browse the results and perform searches. Click facets. Make notes about what to exclude, and consider the expressions needed to do so. 4. Add exclusion criteria. 5. Iterate. Repeat steps 4, 2, and 3 until you've excluded what you want to.

=== Part of URLs matched

In the examples here, matched parts are shown in green and underlined. Unmatched parts are in red.

The part of the URL that is matched is:

* **If there is a path component** – The path component, *omitting the leading slash that precedes it*, and the query component (if present), *but not a fragment component* (if present): +

scheme : // authority /path ?query #fragment

+ The leading slash that precedes the path component is indicated here in red: +

/path-segment-1/path-segment-2

* **If there is no path component** – The query component *but not a fragment component* (if present): +

scheme : // authority / ?query #fragment

Here are some example URLs, indicating the part of each that is matched:

Note

Always specify exclusion criteria to match the *entire* path component (and possibly query component), irrespective of the choice for the Start URL or whether the Start URL contains a path component. The / (slash) in the Admin UI before what you enter represents the slash you omit at the beginning of the path.

==========
==========
==========
==========

==== Matching the path component

When present (most of the time), the path component follows the authority component, separated by a slash (the one Site Search doesn't include in comparisons). The path component consists of one or more path segments, typically referencing directories and files.

This table provides examples of exclusion criteria designed to match the path components of document URLs.

[cols=",",options="header",]

==========
==========

Exclusion goal

Approach and examples

Exclude all files in matching top-level directories, including all files in directories below the top-level directories.

Specify an expression to match the desired top-level path segments. End the expression with a terminal /* to match all directories and files below that.

Notice that the expression doesn't begin with an *.

Example:
`documentation/*`

Excludes (match): `http://mycorp.com/documentation/admin/server.html`
Excludes (match): `http://mycorp.com/documentation/navigation.html?page=2`
Excludes (match): `http://mycorp.com/documentation/`
Includes (not a match): `http://mycorp.com/support/documentation/admin/server.html`
Includes (not a match): `http://mycorp.com/support/documentation`

Exclude specific files in matching top-level directories.

Specify an expression to match the desired top-level path segments. End the expression with a file name and extension, possibly using the wildcard * in the file name and/or extension.

Notice that the expression doesn't begin with an *.

Example:
`documentation/navigation.html`

Excludes (match): `http://mycorp.com/documentation/navigation.html`
Includes (not a match): `http://mycorp.com/documentation/navigation.html?page=2`
Includes (not a match): `http://mycorp.com/documentation/navigation`
Includes (not a match): `http://mycorp.com/support/documentation/navigation.html`

Exclude all files in matching sub-top-level directories.

Specify the full path to the directory. End the expression with a terminal `/*` to match all directories and files below that, and query components if present.

Example:
`/documentation/`

Excludes (match): `http://mycorp.com/documentation/admin/server.html`
Includes (not a match): `http://mycorp.com/support/documentation/admin/server.html`

Exclude specific files in matching sub-top-level directories.

Specify the full path to the directory. End the expression with a file name and extension, possibly using the wildcard
`in the file name and/or extension.`

`If used, a terminal` matches the entire remainder of the path component, and a query component if present.

Example:
`*/documentation/navigation.html`

Excludes (match): `http://mycorp.com/support/documentation/navigation.html`
Includes (not a match): `http://mycorp.com/documentation/navigation.html`
Includes (not a match): `http://mycorp.com/support/documentation/navigation.html?page=2`
Includes (not a match): `http://mycorp.com/support/documentation/navigation`

==========
==========

The focus in the table is the right things to do at the beginning of an exclusion criterion and at the end. In the middle, an * matches zero or more characters (as it does at the beginning and end). Here are some examples of exclusion criteria that contain asterisks in the middle of the expressions:

```
doc*/
doc/nav*
/doc/
/doc*/nav*.html
```

==== Matching the query component

When present (uncommonly), the query component immediately follows the authority or path with no intervening slash.

You might want to indicate that Site Search should ignore all query components. Alternatively, you might want to exclude documents that have specific query components.

This table provides examples of exclusion criteria designed to match the query components of document URLs.

[cols=",",options="header",]

========== ==========
Exclusion goal
Approach and examples
Exclude all documents referenced by URLs that have query components
Specify an `to match all path segments. Specify the question mark that starts the query component, and then the wildcard` to match all query components. **Example:** `?` *Excludes* (match): `http://mycorp.com/documentation/navigation.html?page=2` *Includes* (not a match): `http://mycorp.com/documentation/navigation.html`
Exclude specific documents referenced by URLs that have specific query components.

Specify the desired string for matching the path component. Follow that by the specific query component.

Example:
`shop/used?category=145`

Excludes (match): `http://mycorp.com/shop/used?category=145`
Includes (not a match): `http://mycorp.com/shop/used?category=173`

==========

== Change exclusion criteria

After some experience searching, you might decide that you want to exclude additional documents or re-include excluded ones.

[width="100%",cols="50%,50%",]

Note

When you change exclusion criteria, Site Search discards the current index and reindexes using the new exclusion criteria.

==========

How to change exclusion criteria for documents

1. In the Site Search menu, click the data source for which you want to change exclusion criteria. 2. Under Exclude documents, add and remove exclusion criteria: + * To add an exclusion criterion, click Add or scroll to the bottom of the list of criteria, and then enter the document to exclude. * To remove an exclusion criterion, hover over the criterion, and then click Delete . 3. Click Save and Index to save the changed exclusion criteria and re-index the data source. When the re-indexing completes, users will not find excluded documents (using the new exclusion criteria) in search results.

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Toggle navigation

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 = Build a Search Page and Configure Modules

* Before you begin * Use result templates Select result templates for data sources Edit result templates * Lay out the Search page * Specify a logo * Manage modules Types of modules Add modules Configure modules Move modules Delete modules * Next steps

| ========== |
| Result Template |
| Description |
| Webpage |
| Web pages (file type `html` or `htm`) that a Web crawler data source indexes |
| File |
| A result template that contains fields for typical file metadata |
| Person |
| Files that contain information about people |
| Generic Item |
| Files that are indexed, but that don't use other result templates. Files that a CSV (file type `csv`) or JSON (file type `json` or `jsn`) data source indexes use this result template by default. |
| ==========

[width="100%",cols="50%,50%",] |
| |
| Note |
| Add and configure data sources before working with result templates. |
| ==========

=== Select result templates for data sources

Site Search chooses the best result template based on your data source. If you want to choose a different result template, you can.

[width="100%",cols="50%,50%",] |
| |
| Tip |

For a data source that contains information about people, you must choose the People result template manually.

==========

How to select a result template for a data source

1. In the Site Search menu, click the data source. 2. Click the **Display** tab. 3. Choose a result template. + In the space below the Edit Template button, you see how a search result appears using the selected template. Click **Next** and **Prev** to view different search results.

[width="100%",cols="50%,50%",]

Tip

If this space is empty, you must either select a different result template, or you must make other choices for elements and custom fields and/or map fields differently.

==========

=== Edit result templates

Edit result templates to change the appearance of result lists.

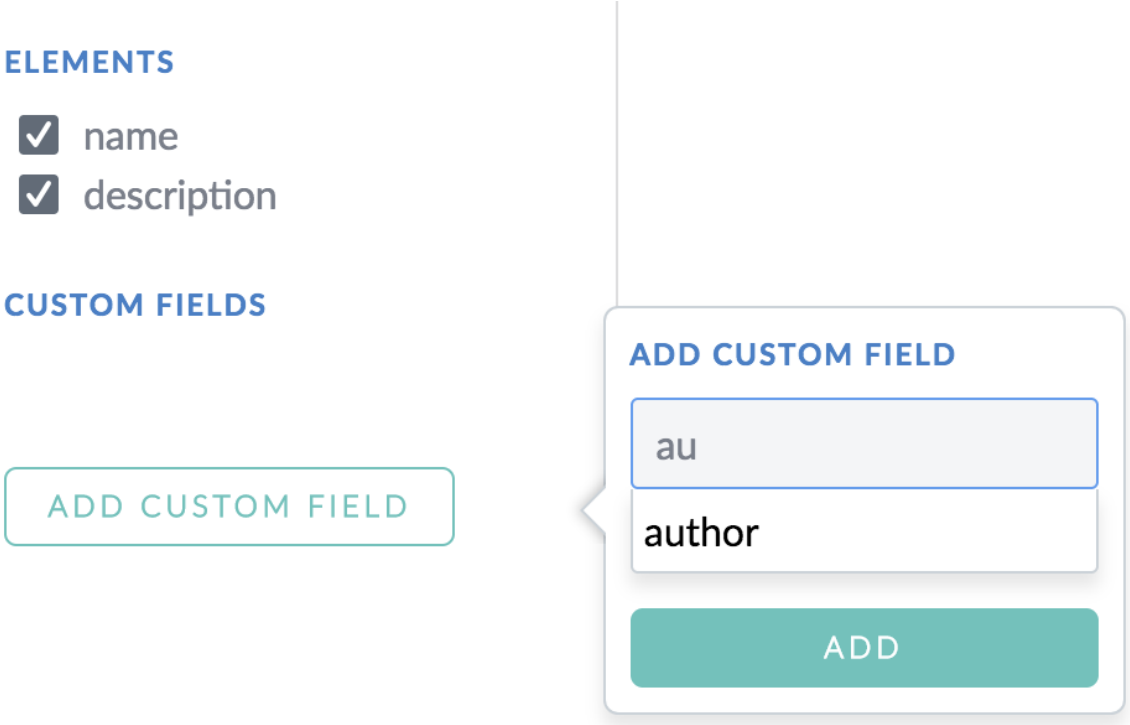
How to edit a result template

1. **Open the Site Search menu** – In the upper left corner of Site Search, click . 2. Click **Result Templates**. An example of a search result is in the center of the page. Click **Next** and **Prev** to view other examples. + [width="100%",cols="50%,50%",]

Tip

If this space is empty, you must either select a different result template, or you must make other choices for elements and custom fields and/or map fields differently.

========== 3. Click a result template. 4. Specify the document elements and custom fields to display. +



+

[cols=",",options="header",]

==========
Setting
Description
Elements
Names of fields that Site Search has chosen for you to include in search results. You can unselect the field names to exclude the fields.
Custom fields
Names of other fields that you can choose to include in search results
========== 5. Change the appearance of fields. Hover over the field and click]. Available settings differ based on the type of field. Settings are: + [cols=",",options="header",]
==========

Setting
Description
Label
An optional label for a field
Field Style
Select appropriate styling for the field. For a label field, select **Label Left**, **Label Above**, or **Label Inline**. Or select **Description**, **Title**, **URL**, or **Image**.
Image Position
Whether an image is displayed **Inline** or floats to the **Right** or **Left**.
Date Format
Format for a date field
Number Format
Format for a numeric field
Max Characters
Maximum number of characters
Default Value
Default value to display when a field lacks a value
URL Field
Name of a field that contains a URL
Add a query filter when the field is clicked

Add a query filter when the field is clicked.

For example, if the result template includes the field `language` and the checkbox for this setting is selected, then a user can click a language value in a result. Doing so adds a query filter for that language to the query, which filters the result list by that value. A breadcrumb is added for the clicked value, if the Results module is configured to show breadcrumbs.

[width="100%",cols="50%,50%",]

Note

This setting has no effect for fields with the field style URL.

==========

==========

[width="100%",cols="50%,50%",]

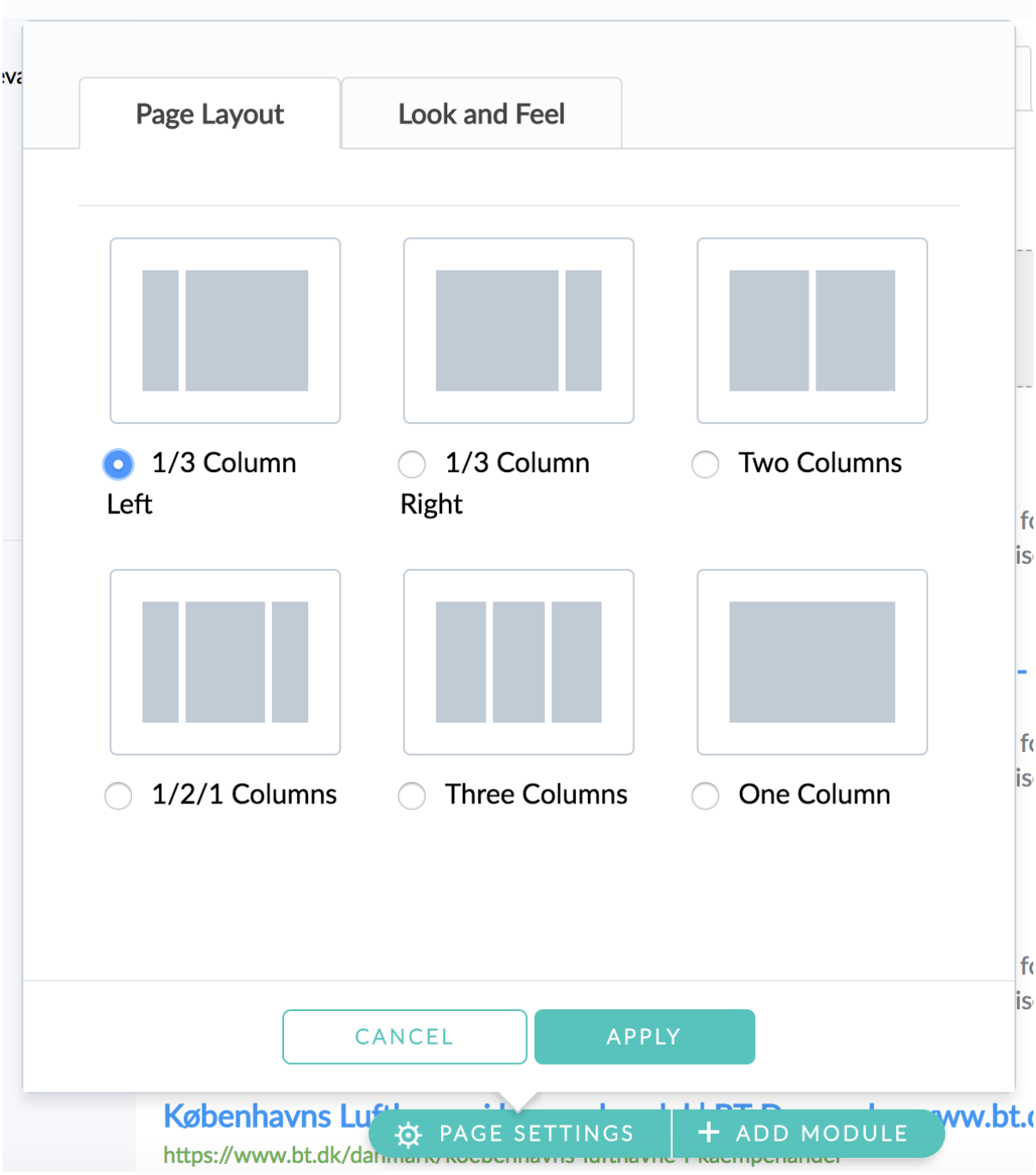
Note

The Display tab for a data source has an Edit Template link that brings you to the page for editing the result template for the data source.

==========

== Lay out the Search page

Choose among several page layouts for the page that displays a list of search results.



How to lay out the Search page

1. In user mode, search for something. The Search page appears. 2. **Open the Site Search menu** – In the upper left corner of Site Search, click . 3. Hover over the page. 4. At the bottom of the page, click

. 5. Select a column layout. 6. Click **Apply**.

Tip

You can change the page layout after adding modules. If you do, you might need to move modules.

==========

== Specify a logo

The Site Search app uses the Lucidworks logo by default. To brand your Site Search app, you can specify a different logo.

[width="100%",cols="50%,50%",]

Tip

Site Search scales the image you provide to fit in the upper left corner of the page. A logo with pixel dimensions of 440 pixels wide x 64 pixels high works well. Logos that have approximately the same aspect ratio (6.875:1) will also work. Site Search scales images that are roughly square to have a 64-pixel height. Scaling doesn't always preserve the aspect ratio of the source image.

==========

How to specify a logo

1. In the Page Builder, hover over the page. 2. At the bottom of the page, click

. 3. Click the **Look and Feel** tab. 4. Under Logo, click **Choose File**. Navigate to the file you want to use, and choose it. 5. Click **Apply**.

==========

Module

Description

Results

Display a list of results from the current search.

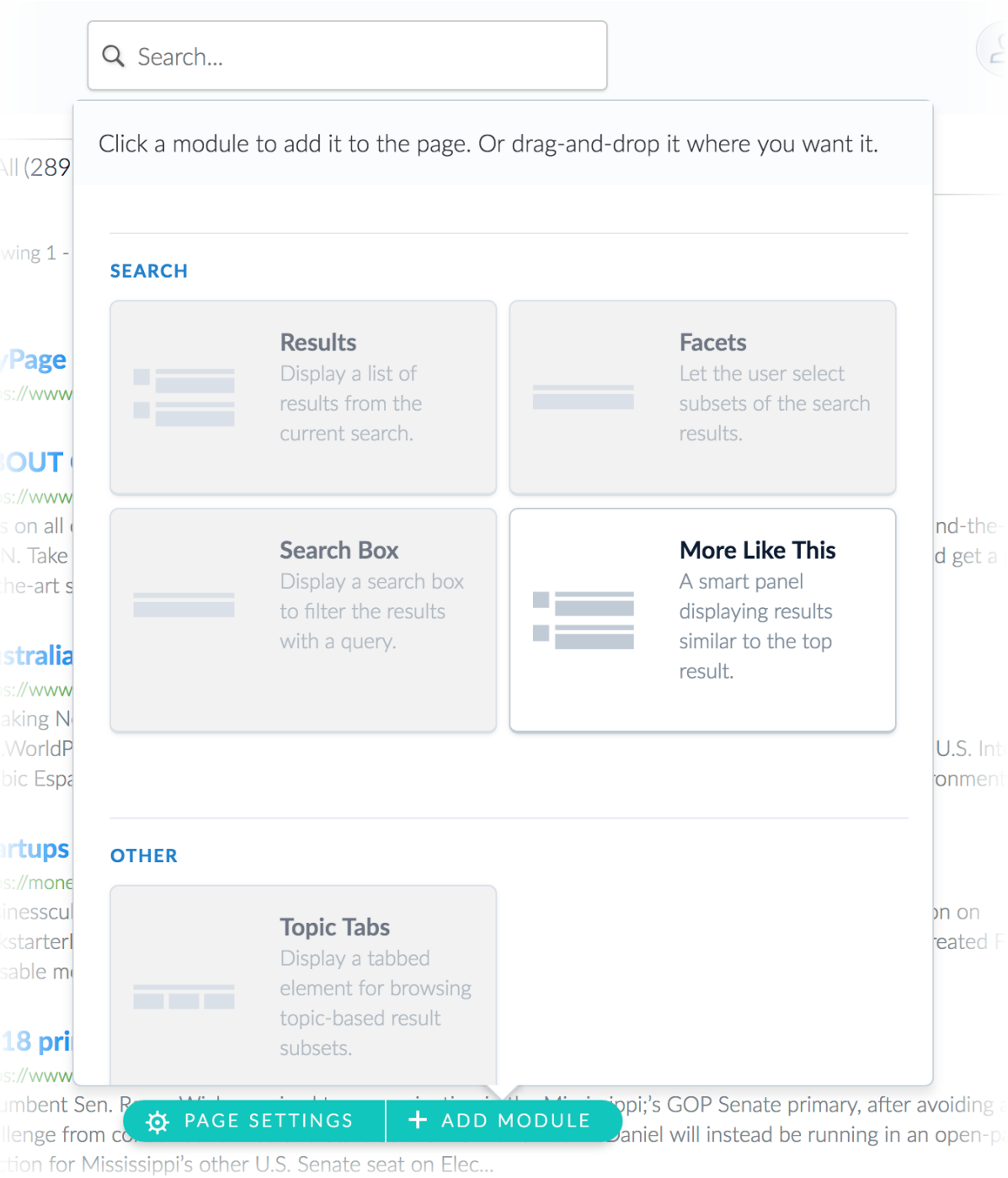
Facets

Let users select subsets of the search results. Facets are field-based groups of search results. For example, if the `department` field is chosen as a facet, then users can click the facets `computers`, `appliances`, and so forth to view those subsets of search results.
Search Box
Users enter search queries in search boxes.
Topic Tabs
Display a tabbed navigation element based on topics.
More Like This
Display search results that are similar to the top result. This is a smart panel that adds intelligence to search and browsing experiences.
========== ========== ==========

==========

=== Add modules

Add modules you want to the Search page.



How to add modules

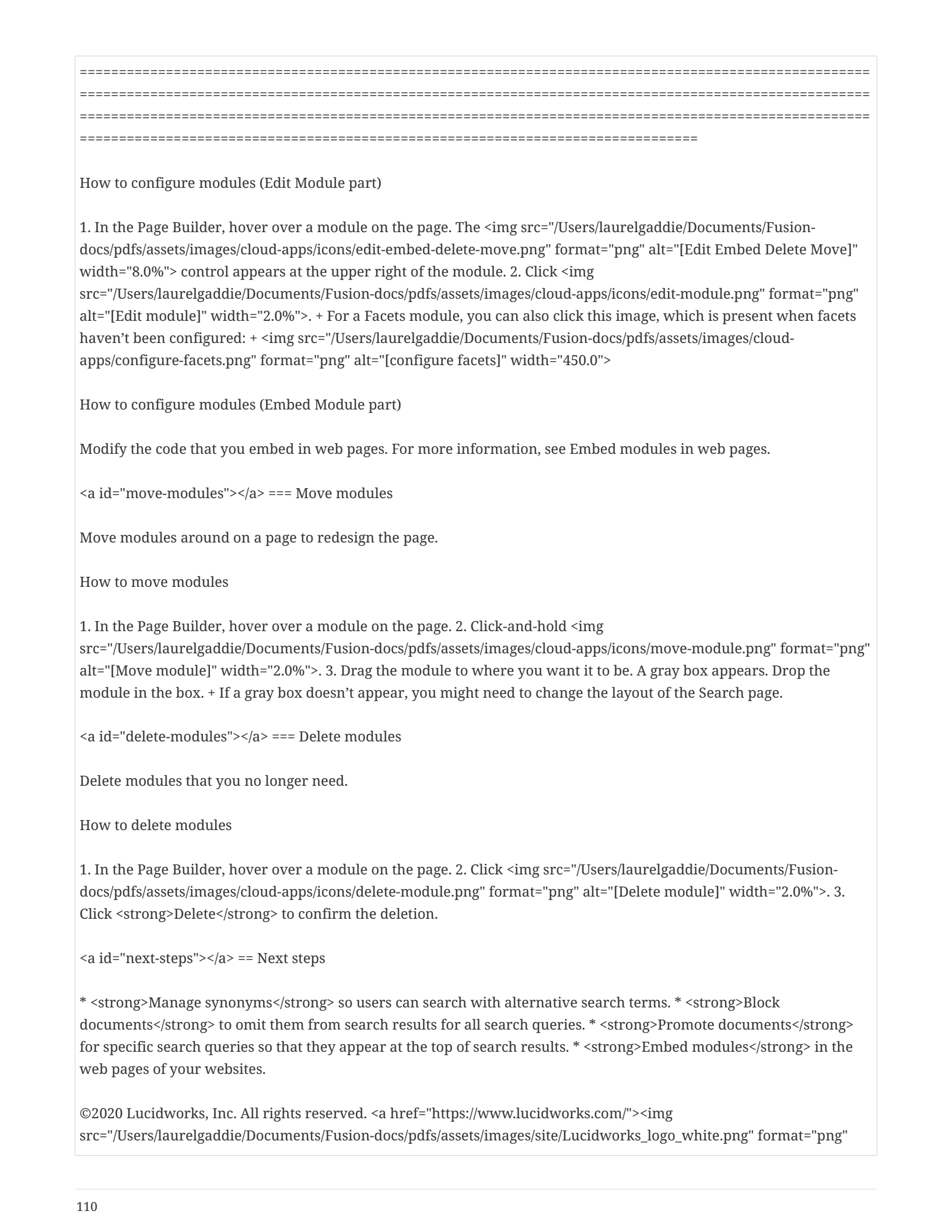
1. In the Page Builder, hover over the page. 2. At the bottom of the page, click + ADD MODULE. 3. Drag a module to where you want it to be on the page. A gray box appears. Drop the module in the box. + If a gray box doesn't

| ========== ========== ==========

Show Breadcrumbs? When enabled, Site Search displays breadcrumbs at the top of the result list – one breadcrumb for the search query and additional breadcrumbs for selected facets. We recommend that you enable breadcrumbs. With breadcrumbs enabled, a user can easily deselect facets (by clicking those breadcrumbs) and/or return to all search results (by clicking the breadcrumb for the search query).
Results
Show Spellchecking? When enabled, Site Search displays Spellchecking and Did You Mean results *after* a user searches.
Results
Display as Cards Select a number of cards per row to display results as cards.
Facets
Facet field names and optional display names. Advanced configuration settings include: • **Show** – Number of facets to show initially. This is a maximum. If there are fewer facets, then only those are displayed. • **Show More** – Number of additional facets to show when a user clicks the **Show more** control • **Show More Label** – Label that the user clicks to show more facets. The default is **Show more**. • **Show Less Label** – Label that the user clicks to display fewer facets. The default is **Show less**.
More Like This
Results To Show

==========
==========
==========
==========

How to configure modules (Edit Module part)

1. In the Page Builder, hover over a module on the page. The  control appears at the upper right of the module. 2. Click . + For a Facets module, you can also click this image, which is present when facets haven't been configured: +

How to configure modules (Embed Module part)

Modify the code that you embed in web pages. For more information, see Embed modules in web pages.

 === Move modules

Move modules around on a page to redesign the page.

How to move modules

1. In the Page Builder, hover over a module on the page. 2. Click-and-hold . 3. Drag the module to where you want it to be. A gray box appears. Drop the module in the box. + If a gray box doesn't appear, you might need to change the layout of the Search page.

 === Delete modules

Delete modules that you no longer need.

How to delete modules

1. In the Page Builder, hover over a module on the page. 2. Click . 3. Click Delete to confirm the deletion.

 == Next steps

* Manage synonyms so users can search with alternative search terms. * Block documents to omit them from search results for all search queries. * Promote documents for specific search queries so that they appear at the top of search results. * Embed modules in the web pages of your websites.

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Note

You aren’t setting the UI language here. All you are doing is adding the correct URL parameter to the first code snippet.

========== + This is an example of the snippet for German: + [source,pygments,highlight] ---- <!-- Lucidworks.cloud embed script -→ <script async="false" src="https://{domain}.lucidworks.cloud/{pathname}/embed/v1/ui/loader.js?language=de"></script> ---- 4. Copy the snippet to the `<head>` element of the HTML page or pages on which you are embedding modules.

Alternatively, you can add the `language` URL parameter in the `loader.js` URL in the Lucidworks.cloud embed script snippet after copying the snippet to an HTML page or pages.

=== Specify the search language

Specify the search language so that Site Search can boost documents in that language, which moves the documents closer to the beginning of search results. Boosting occurs in search results in a Results module and in search results returned by the Search API. Boosting also occurs for suggested documents.

[width="100%",cols="50%,50%",]

Tip

Specifying a search language *doesn’t* restrict results to that language.

==========

How to specify the default search language

Specify the default search language for all Search Box modules, suggested documents, and the Search API:

1. Hover over the Search Box module, and then click . 2. Select the language from the **Default Search Language** dropdown list. The language English is selected by default.

How to specify the search language for a specific Search Box module

In the snippet for the Search Box, include a `language` attribute in the `<cloud-search-box>` element, for example:

[source,pygments,highlight] ---- <cloud-search-box language="fr"></cloud-search-box> ----

How to specify the search language in a Search API request

Include the `language` URL parameter in the Search API request, as shown in this example:

[source,pygments,highlight] ---- curl -H 'X-API-Key: 7556b805-662d-44c8-b463-d8cb0fa486e56765f6e6-dd60-4fdc-9c53-d8c03edb3a2e' 'https://fusion-search.lucidworks.cloud/search/api/v1/search?p=1&rpp=5&language=fr&fi=name,url,description&q=justin%20trudeau' ----

== Override strings in modules

You can override the strings in modules. You can do this irrespective of whether you localize modules.

The order of overriding is:

1. (For all modules) The default language is English. Modules use default strings for English. 2. (For all modules on a page) The `language` URL parameter in the `loader.js` URL specifies the language. The URL parameter is in the Lucidworks.cloud embed script snippet. Each module uses the default strings for the language specified for the HTML page. 3. (For all modules on a page) Add any string overrides to a `<script>` element somewhere on the page (in the `<HEAD>` or `<BODY>` element.

How to override strings for all modules on a page

1. Take this script as the starting point: + [source,pygments,highlight] ---- <script> window.AppkitTranslations['components.breadcrumbs.clear-all'] = 'Clear all'; window.AppkitTranslations['components.breadcrumbs.exclude'] = 'not {breadcrumb}'; window.AppkitTranslations['components.facet.show-less'] = 'Show less'; window.AppkitTranslations['components.facet.show-more'] = 'Show more'; window.AppkitTranslations['components.more-like-this.subtitle'] = 'More results like {result}'; window.AppkitTranslations['components.more-like-this.title'] = 'Similar Results'; window.AppkitTranslations['components.more-like-this.top-result'] = 'the top result'; window.AppkitTranslations['components.no-results.subtitle'] = 'If you've checked your spelling: try using more general keywords.'; window.AppkitTranslations['components.no-results.title'] = 'Sorry: there are no results that match your

Tip

Not all of these strings are used by all modules. You only need to include the strings for all overrides you want to occur on the specific page. For simplicity's sake, you could include all of the strings you override on every page with modules.

========== 2. Modify the strings as desired, in the desired target language. For example, for the English strings, you might use: + [source,pygments,highlight] ---- <script> window.AppkitTranslations['components.breadcrumbs.clear-all'] = 'Clear breadcrumbs'; window.AppkitTranslations['components.facet.show-less'] = 'Show fewer'; window.AppkitTranslations['components.more-like-this.subtitle'] = 'More like {result}'; window.AppkitTranslations['components.more-like-this.title'] = 'Similar Results'; window.AppkitTranslations['components.no-results.title'] = 'Sorry, no results match your search criteria.'; window.AppkitTranslations['components.pagination.next'] = 'Next'; window.AppkitTranslations['components.pagination.previous'] = 'Previous'; window.AppkitTranslations['components.spelling-suggestions.did-you-mean'] = 'Did you mean {query}?'; window.AppkitTranslations['components.spelling-suggestions.no-results'] = 'Search query {query} gave no results.'; window.AppkitTranslations['schema.name.default'] = '(Missing Name)'; </script> ---- + [width="100%",cols="50%,50%",]

Important

We recommend that you leave the variables (in curly braces, e.g. `{first}`) in the strings. You can change their placement in the strings. `components.spelling-suggestions.no-results` is an example of changing the placement.

========== 3. Notice the emphasis (`<em></em>`) added to `{result}` in this default string: + [source,pygments,highlight] ---- window.AppkitTranslations['components.more-like-this.subtitle'] = 'More results like {result}'; ---- + You can make judicious use of emphasis in other strings, for example: + [source,pygments,highlight] ---- window.AppkitTranslations['components.spelling-suggestions.did-you-mean'] = 'Did you mean: {query}'; ---- + [width="100%",cols="50%,50%",]

Note

The only HTML tag you can add is `<em>`.

==========

 == Style modules with CSS

You can use cascading style sheets (CSS) to style modules.

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src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/site/Lucidworks_logo_white.png" format="png"
alt="[Lucidworks logo">]

:leveloffset: 3

:leveloffset: +2

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format="png" alt="[image Documentation]">

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 = Search Box

* Example * Configuration options * Style Search Box modules with CSS

Search Box modules let users search. You might only need one Search Box module for all searches. On the other hand, you might want more than one Search Box module, for example, ones to search over different topics or in different languages.

Results that Site Search obtains in a search appear in a Results module.

In addition to searching, you can configure a Search Box module to show suggested query completions or suggested documents.

| ========== ========== ==========

Embed Module
Search language
For a specific Search Box module, override the default search language. In the snippet for the Search Box, include a `language` attribute in the `<cloud-search-box>` element, for example: ``` <cloud-search-box language="fr"></cloud-search-box>` ```
Embed Module
Topics
Limit search results to specific topics.

==========

How to configure a Search Box module

See Configure modules.

 == Style Search Box modules with CSS

You can use cascading style sheets (CSS) to style Search Box modules.

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 = Results Module

* Examples * Configuration options * Style Results modules with CSS

Results modules display search results. You might only need one Search Box module for all searches. On the other hand, you might want more than one Results module, for example, ones in different languages.

========== ========== ========== ==========
Location
Option
Description
Edit Module
Results per page
Results to display per page
Edit Module
Show Breadcrumbs?
When enabled, Site Search displays breadcrumbs at the top of the result list – one breadcrumb for the search query and additional breadcrumbs for selected facets. We recommend that you enable breadcrumbs. With breadcrumbs enabled, a user can easily deselect facets (by clicking those breadcrumbs) and/or return to all search results (by clicking the breadcrumb for the search query).
Edit Module
Show Spellchecking?
When enabled, Site Search displays Spellchecking and Did You Mean results *after* a user searches.
Edit Module
Display as Cards
Select a number of cards per row to display results as cards.
Embed Module
UI language

UI language for the Search Box. To specify a different UI language for an embedded module (or to explicitly specify English), add a `language` URL parameter in the `loader.js` URL in the embed snippet that you copy to the `<head>` element.
Embed Module
Search language
Override the default search language for a specific Search Box module. In the snippet for the Search Box, include a `language` attribute in the `<cloud-search-box>` element, for example, `<cloud-search-box language="fr"></cloud-search-box>`.

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How to configure a Results module

See Configure modules.

 == Style Results modules with CSS

You can use cascading style sheets (CSS) to style Results modules.

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src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/site/Lucidworks_logo_white.png" format="png" alt="[Lucidworks logo"]

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Toggle navigation

========== ========== ==========
Location
Option
Description
Edit Module
Tabs
Specify the tabs present, their order, and optionally the tab names.
Embed Module
Tabs
Override the default tabs for a Topic Tabs module. In the snippet for the Topic Tabs module, include a `topics` attribute in the `<cloud-tabs>` element, for example, `<cloud-tabs topics="marketing=Marketing,finance=Finance"></cloud-tabs>`. For more information, see Configure tabs.
Embed Module
UI language
UI language for the Search Box. To specify a different UI language for an embedded module (or to explicitly specify English), add a `language` URL parameter in the `loader.js` URL in the embed snippet that you copy to the `<head>` element.

========== ========== ==========
How to configure a Topic Tabs module See Configure modules. === Configure tabs You can configure the tabs present, the order of tabs, and the names displayed on tabs: * **Single customization** – To make a single customization of the presence, order, and display names of tabs, configure the Topic Tabs module in the Admin UI. * **Multiple customizations** – To make multiple customizations of the presence, order, and display names of tabs, modify the separate embedded snippets for the Topic Tabs modules. You can configure tab names to provide language-specific tab names. This table describes configuration in detail: [cols=",,,",options="header",]
========== ==========
Override hierarchy
Presence
Order
Naming
Global default (1)
All tabs are present.
The `All` tab is first. Other tabs are in the order in which data sources were created. Tabs with no results are absent.
Topic display names are used.
Configure the Topic Tabs module (2) Overrides (1)
Specified tabs and the `All` tab are present.
The `All` tab is first. Other tabs are in the order specified. Tabs with no results are grayed out.

Display names specified in the module configuration are used. For omitted names, the topic display names are used.
Modify snippets for embedded modules `(3)` Overrides `(2)` and `(1)`
Specified tabs and the `All` tab are present.
The `All` tab is first. Other tabs are in the order specified. Tabs with no results are grayed out.
Display names specified in the embedded module snippet are used. For omitted names, the topic display names are used.

==========

==== Configure the Topic Tabs module

How to configure the Topic Tabs module

1. In the Page Builder, hover over the Topic Tabs module, and then click

. 2. Under Tabs, specify the tabs present and their order. Optionally, specify display names for tabs. For any tabs for which you don’t specify names, Site Search uses the display names for the topics. + The format to just specify tabs present (refer to them by topic names) and their order is: + [source,pygments,highlight] ---- topic1name,topic2name,… ---- + The format to specify the tabs present, order, and tab names is: + [source,pygments,highlight] ---- topic1name=tab1name,topic2name=tab2name,… ---- + For each tab, you can specify a tab name or not, for example: + [source,pygments,highlight] ---- topic1name=tab1name,topic2name,topic3name=tab3name,… ---- 3. Click Apply.

==== Modify embedded snippets

How to modify embedded snippets for a Topic Tabs module:

1. Copy the snippets for the Topic Tabs module to a web page. 2. Edit the second snippet (the <code><cloud-tabs></code> one) to include a topics parameter.

Syntax of the topics parameter:

The syntax to just specify tabs present (refer to them by topic names) and their order is:

[source,pygments,highlight] ---- <cloud-tabs topics="topic1name,topic2name,…"></cloud-tabs> ----

The syntax to specify the tabs present, order, and tab names is:

[source,pygments,highlight] ---- <cloud-tabs topics="topic1name=tab1name,topic2name=tab2name,…"></cloud-tabs> ----

For each tab, you can specify a tab name or not, for example:

[source,pygments,highlight] ---- <cloud-tabs topics="topic1name=tab1name,topic2name,topic3name=tab3name,…"></cloud-tabs> ----

 == Style Topic Tabs modules with CSS

You can use cascading style sheets (CSS) to style Topic Tabs modules.

| ========== ========== ==========

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How to configure a Facets module

See Configure modules.

 == Style Facets modules with CSS

You can use cascading style sheets (CSS) to style Facets modules.

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 = More Like This

* Example * Configuration options * Style More Like This modules with CSS

More Like This modules display search results that are similar to the top result. This is a smart panel that adds intelligence to search and browsing experiences.

| ========== ========== ==========

==========

How to configure a More Like This module

See Configure modules.

 == Style More Like This modules with CSS

You can use cascading style sheets (CSS) to style More Like This modules.

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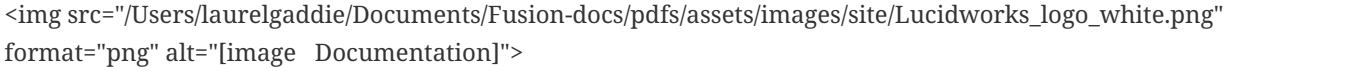

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 = Style Modules with CSS

* Before you begin * CSS development environment * How CSS styling works * How to style HTML elements with CSS * Sample HTML * Sample CSS Starting point Search Box modules Topic Tabs modules Results modules Facets modules More Like This modules Final result

You can use cascading style sheets (CSS) to style modules that you

========== ==========
Aspect
Topics
Facets
Browsing
Browse all search results from one or more data sources
Browse subsets of search results based on values of fields in the search results
Searching
You can configure a Search Box to limit searches to a specific topic or topics. Using the Search API, you can also limit a search to a specific topic or topics.
Facets are an available module for limiting searches one facet at a time. In the Search API, you can specify one or more facets.
Granularity
Broad, data-source level
Narrow, data-value level
Combine categories
Associate the same topic with multiple datasources. A tab for that topic will contain search results for the data sources with that topic associated. You predefine the combinations.
Users can select multiple facets. They define the combinations.

==========

== Add Topics

Add topics to let users distinguish search results based on data sources. There are two approaches:

* **On the Configuration tab for a data source** – When you add a new topic on the Configuration tab for a data source, that topic is added *and* it is associated with the data source. Optionally, associate the topic with other data sources on the Configuration tabs for other data sources. * **In the Topic Manager** – When you add a new topic in the Topic Manager, that topic is added but *isn't associated with any data sources*. You must associate the topic with data sources on the Configuration tabs for the data sources.

In both cases, you can change the display name of topics in the Topic Manager.

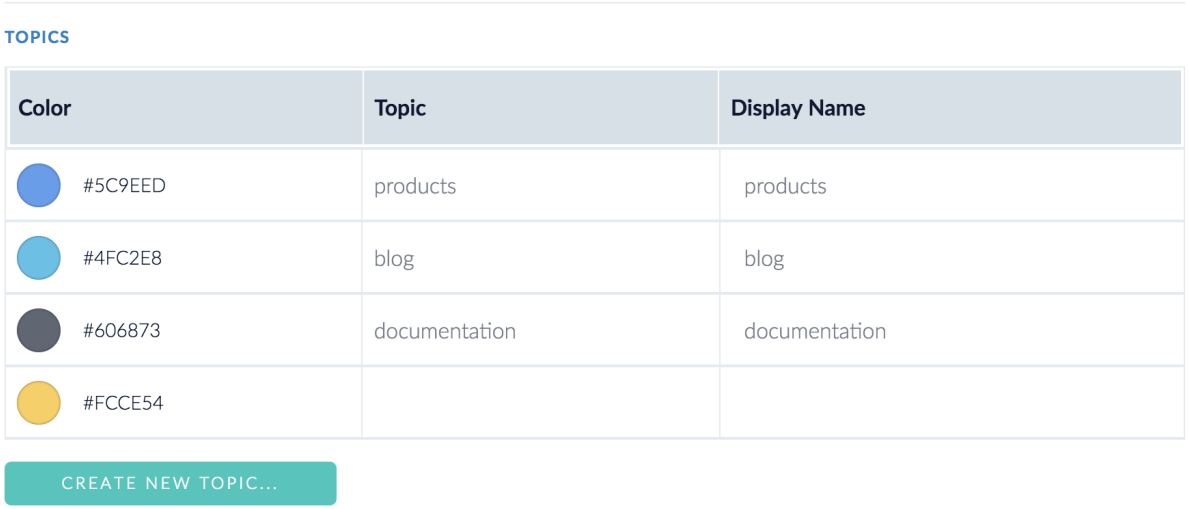
How to add topics on the Configuration tab in a data source

When adding a new data source or editing an existing one, scroll down to **Data Source Topics**, and then enter topics. The topics can be new ones or can already exist.

To associate the same tags with other data sources, repeat this step for the data sources.

How to add topics in the Topic Manager

1. **Open the Site Search menu** – In the upper left corner of Site Search, click . 2. Click **Topics** in the left menu. +



3. Repeat these steps for each topic you want to add:

a. In the Topics table, enter a **Topic** (the name for the topic on Configuration tabs of crawlers) and the **Display Name** (the name for the topic shown in the search app). b. Click **Create New Topic**.

== Disassociate topics from a data source

You can disassociate topics from a data source. Doing so *doesn't* delete the topics, even if they aren't used by other data sources.

Tip

If a topic *isn't* used by other data sources, you probably want to delete it in the Topic Manager. Deleting the topic in the Topic Manager will remove the topic from the Topic Tabs module, and the user won't see a grayed-out tab with zero documents.

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 == Delete topics

Delete topics that are no longer needed. Deleted topics will no longer appear as tabs in the Topic Tabs module (both in an Enterprise Search app and in embedded modules).

How to delete topics

1. In the Site Search menu, click Topics in the left menu. 2. In the Topics table, hover over the topic you want to delete, and then click Delete <img src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/cloud-apps/icons/delete-item.png" format="png" alt="[Delete]" width="2.5%">.

 == Restrict search results to specific topics

You can restrict search results to specific topics:

Modules:

Search API:

In the request, include a <code>topics</code> request parameter that specifies the topics to which to restrict search results. For example, to search for <code>module</code> and restrict the search results to the topics <code>lucidworks_cloud</code> and <code>site_search</code>:

[source,pygments,highlight] ---- curl -H 'X-API-Key: YOUR_API_KEY' 'https://subdomain.lucidworks.cloud/pathname/api/v1/search?q=module&topics=lucidworks_cloud,site_search' ----

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* Administration Guide Sign Up Tour The Dashboard Manage Apps Manage Administrative Users Security Your Data * Site Search Guide Get Started * Review

Note

Separate synonyms with commas, ⇒, or ⇒ and commas. *Don't* include any spaces in the list of synonyms. For example enter `whisky,whiskey,scotch`, not `whisky, whiskey, scotch`. You can include spaces in multiword terms without needing quotation marks, for example, `PTO,personal time off,time off,vacation`.

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If synonyms overlap, Site Search combines them. For example, if the synonym mappings contain the synonym mappings A⇒A,B and A⇒A,C, then the result is the same as A⇒A,B,C; when the user searches for A, Site Search returns the results for A, B, and C.

 == Add Synonyms

Add synonyms to improve the quality of search results.

How to add synonyms

1. Open the Site Search menu – In the upper left corner of Site Search, click . 2. In the left menu, click Synonyms. + 3. In the synonym table, enter a Mapping, and then click Create New Synonym. + You can also leave synonyms defined, and include or exclude them from use. To use a synonym, click . To not use the synonym, unselect the checkbox.

 == Languages and synonyms

Synonyms can be in any of the supported languages. At the moment, you define them all in any order in the Site Search Admin UI.

 == Edit Synonyms

Edit synonyms that you want to adjust.

How to edit synonyms

1. In the Site Search menu, click Synonyms in the left menu. 2. For the synonyms you want to edit, click in the Mapping fields and edit the synonyms. To change the synonym type, click the button under Type. + Synonyms you edit move to the bottom of the synonym table. 3. After making your last edit, click outside of the Mapping field for that synonym, or on a different item in the main menu.

 == Change the synonym type

It’s unlikely you would want to change the synonym type, but if you do want to, this is how.

How to change the synonym type

1. In the Site Search menu, click Synonyms in the left menu. 2. In the Synonyms UI, click the button to the left of a synonym definition to toggle between the two types of synonyms: + *

Note
You can also obtain suggested query completions through the Suggestions API.

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 = Block Documents

* Comparison of exclusion and blocking * Block documents * Unblock documents

Not all web pages on a website will interest users as search results. Constraining search results can be useful when:

* Websites contain landing pages, support pages, contact pages, archives, and so forth. When a user searches for a product, these pages can appear among the search results. * Websites have major sections, for example, Products, Used Products, Technology, etc.

 == Comparison of exclusion and blocking

Site Search provides two ways to omit unnecessary or undesired documents from search results:

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Approach

Description

Exclude documents
(*Web Crawler*)

Omit documents from the index when a web data source is crawled. Site Search omits documents by comparing a series of exclusion criteria (which are regular expressions) with parts of the uniform resource locators (URLs) for the web pages (the path component and the query component). A web page (or other document, such as a CSS file) is excluded if any exclusion criterion matches the compared part of the resource's URL.

Exclusion criteria can contain characters that are valid in URLs as well as * (asterisk), which matches zero or more characters. Matching is case sensitive.

An excluded document is not in the index, so users won't be able to find the document by searching in embedded Site Search modules or in search apps that use the Site Search APIs.

Including previously excluded documents or excluding previously included ones reindexes the data source.

Block documents
(*All data sources*)

Omit specific documents one-by-one from search results for all queries.

Blocked documents *are* in the index, so blocking a document or unblocking it doesn't necessitate reindexing.

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Important

Excluding and blocking documents are *not* intended to provide data security or privacy. Site Search is intended for use with the public Web. Excluded documents still exist on the indexed website. Users can find the documents by searching on the source websites or by having document URLs. Similarly, blocked documents still exist in the data sources from which they were indexed. Also, changes in document names and locations on a website can undo exclusion or blocking of documents.

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For information about excluding documents, see Exclude documents.

 == Block documents

Block documents to omit specific documents from search results for all search queries.

How to block documents

1. In the Page Builder, perform a search or searches that reveal the documents you want block. To browse multiple pages of search results, use the page controls at the bottom of the pages. 2. Hover over the search result for a document you want to block. The search result turns green and controls appear in the upper right corner of the result: + <img src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/cloud-apps/block-document-hover.png" format="png" alt="[block document hover]" width="450.0"> 3. Click Block <img src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/cloud-apps/icons/block-document.png" format="png" alt="[Block]" width="2.0%">.

 == Unblock documents

Unblock documents that you decide to make searchable again.

How to unblock documents

1. In the Site Search menu, click Blocked Documents. + You should see the documents that you've blocked. 2. Select the documents you want to unblock by selecting the checkboxes, and then click Restore Selected. + Site Search unblocks the documents. Users can find them again in search results.

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Tip

Even if a document is where you want it to be in the search results (for example, the very first document), you must still promote the document to the rank where you want it.

========== ========== 5. To promote a document, hover over it, and then click .

 == View promotion queries and promoted documents

1. In the main menu, click Promoted Documents. You see the promotions. 2. Click the promotion for which you want to view promoted documents. + Promoted documents for the query appear in the right pane.

 == Promote a document in the Promotions Manager

1. In the main menu, click Promoted Documents. Under Promotions, you see the promotions. 2. Click Add Promotion. 3. Enter the query that will trigger the promotion. 4. Click Add Document.

1. To promote a document that is listed, hover over the document, and then click Promote. To see more information about a document, click . 2. To promote other documents, search for them. Hover over each document you want to promote, and then click Promote.

 == Change the query associated with a set of promoted documents

1. In the main menu, click Promoted Documents. In the Promotions pane, you see the promotions. 2. Under Promotions, click a query. 3. Under Query that triggers promotion, enter a new query.

 == Remove a document from a promotion

1. In the main menu, click Promoted Documents. In the Promotions pane, you see the promotions. 2. Under Promotions, click a query. 3. Under Promoted documents, hover over a query, and then click Delete .

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Note

It isn't currently possible to localize the Lucidworks Cloud dashboard or the Admin UI for Site Search apps in a language other than English.

==========

== Language features for supported languages

Site Search has these language features.

* **Index language-specific parts of websites** – Although not a language feature per se, in some cases you can separate documents by language by creating different data sources for different parts of websites. For example, one Web Crawler data source in a Site Search app might index `https://my.company.com/products/en` for the English pages and another data source would index `https://my.company.com/products/fr` for the French pages. + Documents from different data sources are available on different tabs in a Topic Tabs module. * **Specify and detect the content languages of documents** – Site search uses a combination of *language specification* and *language detection* to determine the content languages of documents. + **Specify document content languages – In CSV, JSON, and Push Endpoint data sources, use a field `language` to specify the language of document contents. In Web Crawler data sources, map a `meta_tag_name_fieldname` field that specifies document languages to the field `language`. Only supported languages can be specified. Detect document content languages** – For documents that don't specify a language, Site Search attempts to detect the language. Only supported languages are detected. * **Specify the search language** – Specify the search language so that Site Search can boost documents in that language, which moves the documents closer to the beginning of search results. Boosting occurs in search results in a Results module and in search results returned by the Search API. + [width="100%",cols="50%,50%",]

Tip

Specifying a search language doesn't restrict results to that language. It does result in documents in that language being boosted.

========== ========== + Default search language: Specify the default search language for Search Box modules. In the Page Builder, hover over the Search Box module, and then click <img src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/cloud-apps/icons/edit-module.png" format="png" alt="[Edit module]" width="2.0%">. Select the language from the Default Search Language dropdown list. The language English is selected by default. Per-module search language: Override the default search language for a specific Search Box module. In the snippet for the Search Box, include a <code>language</code> attribute in the <code><cloud-search-box></code> element, for example, <code><cloud-search-box language="fr"></cloud-search-box></code>. Search language for a Search API request – Include the <code>language</code> URL parameter in the Search API request. * Language-specific stemming and lemmatization – During indexing and searches, language-specific stemming and lemmatization broadens the search results to include other linguistic forms of the search term. For example, a search for "searching" would also match "search" and "searched". * UI language for modules – Specify the UI language of embedded modules. + Language-specific stemming and lemmatization – During indexing and searches, language-specific stemming and lemmatization broadens the search results to include other linguistic forms of the search term. For example, a search for "searching" would also match "search" and "searched". The default UI language for all embedded modules is English. To specify a different UI language for an embedded module (or to explicitly specify English), add a <code>language</code> URL parameter in the <code>loader.js</code> URL in the embed snippet that you copy to the <code><head></code> element. For example, for German: + [source,pygments,highlight] ---- <!-- Lucidworks.cloud embed script -→ <script async="false"
src="https://{subdomain}.lucidworks.cloud/{pathname}/embed/v1/ui/loader.js?language=de"></script> ---- + You can add the URL parameter to the script before copying it. On the dialog box for embedding the module, select the UI language from the UI language dropdown list. Then copy the snippet. * UI strings in modules – You can override strings in embedded modules by adding a <code><script></code> element that specifies the strings to the HTML page in which the module is embedded; for example: + [source,pygments,highlight] ---- <script> window.AppkitTranslations['components.breadcrumbs.clear-all'] = 'Clear breadcrumbs'; window.AppkitTranslations['components.facet.show-less'] = 'Show fewer'; window.AppkitTranslations['components.more-like-this.subtitle'] = 'More like {result}'; window.AppkitTranslations['components.more-like-this.title'] = 'Similar Results'; window.AppkitTranslations['components.no-results.title'] = 'Sorry, no results match your search criteria.'; window.AppkitTranslations['components.pagination.next'] = 'Next'; window.AppkitTranslations['components.pagination.previous'] = 'Previous'; window.AppkitTranslations['components.spelling-suggestions.did-you-mean'] = 'Did you mean {query}?'; window.AppkitTranslations['components.spelling-suggestions.no-results'] = 'Search query {query} gave no results.'; window.AppkitTranslations['schema.name.default'] = '(Missing Name)'; </script> ---- * Boosting – In search results, including the one for all documents on the All tab of a Topic Tabs module, documents with a specified-or-detected language matching the default search language are boosted (moved up some toward the top of search results). Promoted documents (if any) are at the very top. Boosting doesn’t guarantee that there won’t be documents in other languages near the top of the search results. + Boosting by this language match is also applied to suggested documents that are displayed while a user enters a search query in the Search Box (if the Search Box is configured for this).

 == Specifying and detecting languages

Site Search lets the data supplier specify the languages of documents. For documents that don’t have a specified language, Site Search attempts to detect the language. Specification and detection of languages apply to all data source types.

Note

Site Search captures search analytics data from embedded modules and API requests. Searches and clicking results and so forth in the Admin UI don't count toward search analytics metrics.

==========

== Query metrics

How to view query metrics

1. In the Site Search menu under Insights, click **Search Analytics**. The Queries tab is selected. 2. (Optional) In the upper left, select a timeframe from the dropdown list – **All Time** (the default), **Today**, **Previous Week**, **Previous 30 Days**, or **Previous 90 Days**; the previous periods don't include today. To specify a custom time period, select **Custom Time Period**, click **From date** and **To date** and select dates, and then click **done**.

Query metrics include:

[cols=",",options="header",]

==========

Metric

Description

Top Queries (chart)

Pie chart showing the most popular search queries, including queries that returned results and ones that didn't.

Queries

Total number of user queries

Unique Queries

Total number of user queries, removing duplicate queries

Top Queries (table)

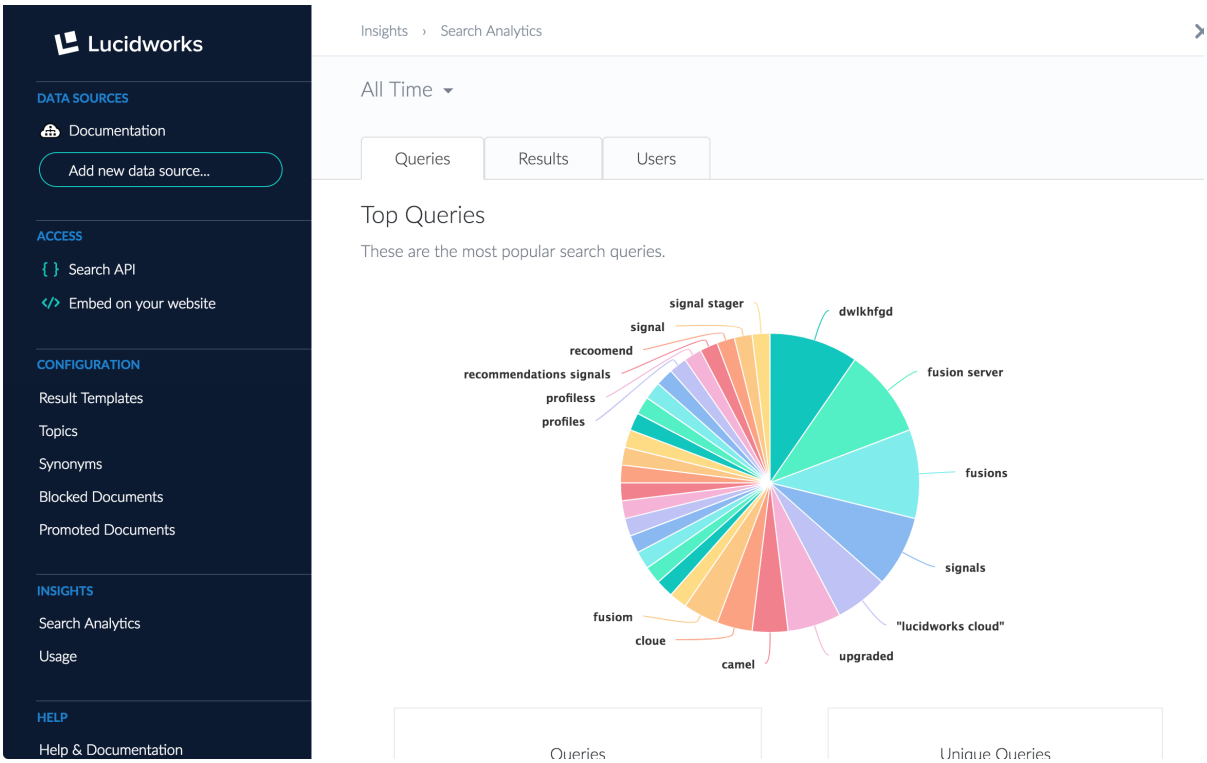
Table showing the query, count, and percentage of queries for the top queries. Under Promotions and Synonyms, Manage buttons give you quick access to manage promoted documents and synonyms.

Top Queries that Gave No Results (chart)
Graph showing the most common search queries that returned no results
Queries that Gave No results
Total number of user queries that returned no results
Unique Queries that Gave No Results
Number of user queries that returned no results, removing duplicate queries

==========

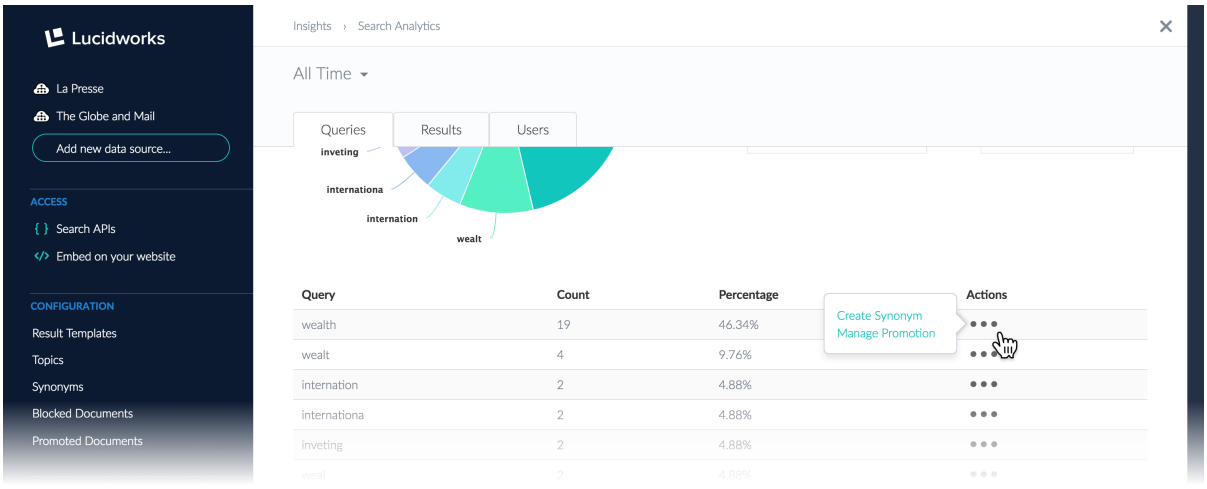
==========

This is an example of the Top Queries pie chart:



== Take actions for queries

From the Search Analytics page, you can take actions for specific queries. You can create a synonym mapping or manage promotions for the query.



=== Create a synonym mapping

You can create a synonym mapping for a query listed under Top Queries or Top Queries that Gave No Results. To do so, you are taken to the part of the Site Search Admin UI for configuring synonym mappings.

========== ========== ==========
Metric
Description
Most Popular Results (graph)
Graph showing the results that users clicked most often.
Total Result Clicks
Total number of clicks on results
Unique Result Clicks
Total number of results that have been clicked. Only one click is counted per result.
Most Popular Results (table)
Table showing the following for the top queries: the query, the total count of result clicks for the query, and percentage of total result clicks. Under Promotions and Synonyms, Manage buttons give you quick access to manage promoted documents and synonyms.

==========

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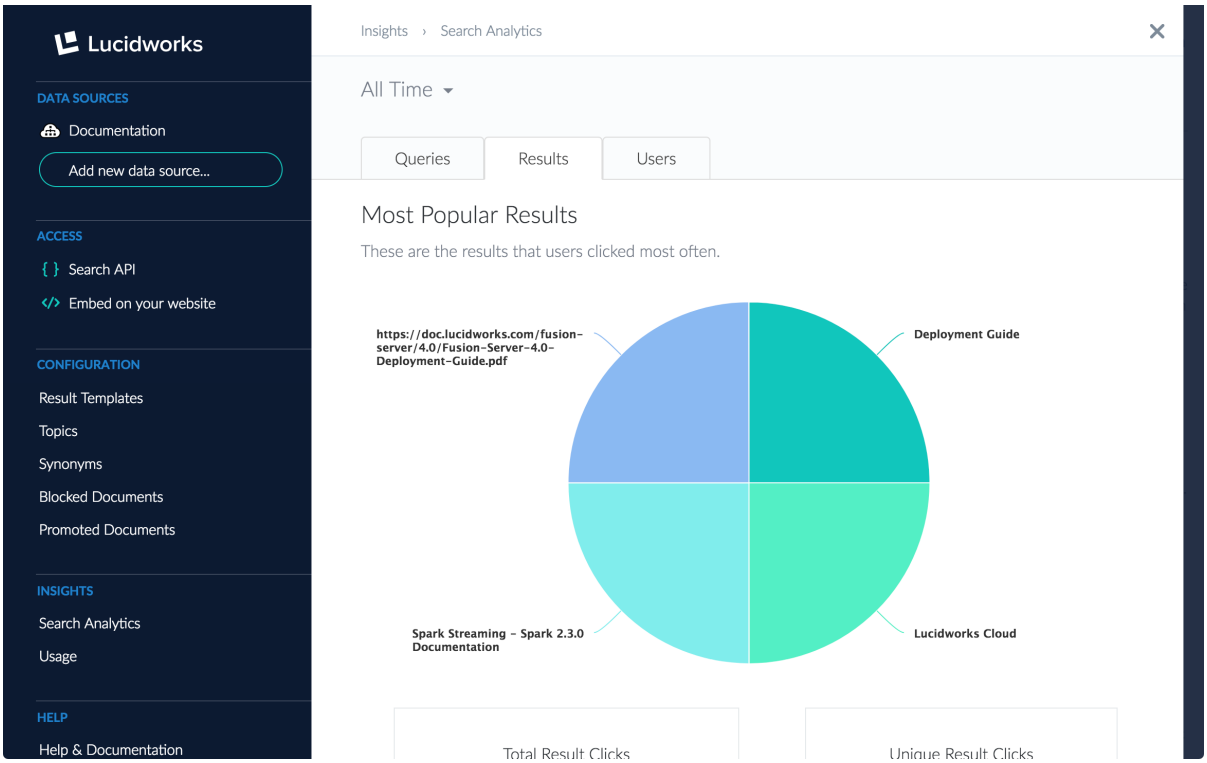
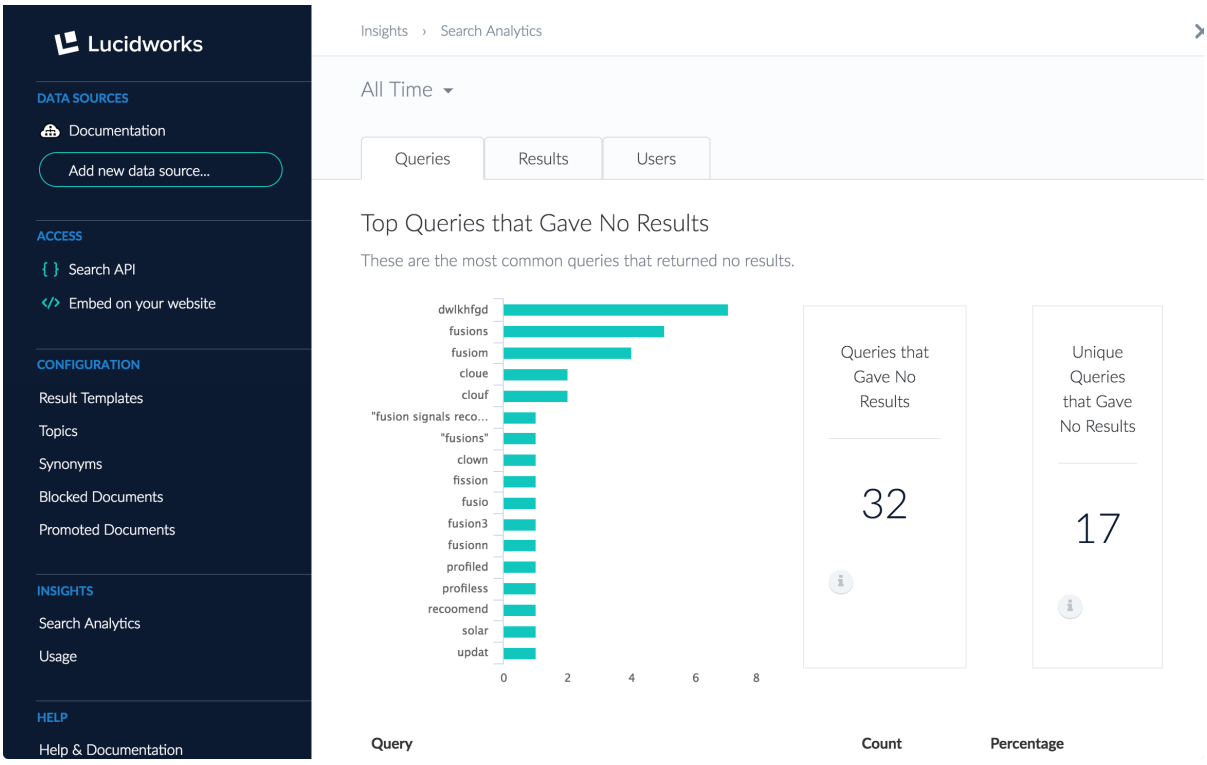
This is an example of the Most Popular Results pie chart:



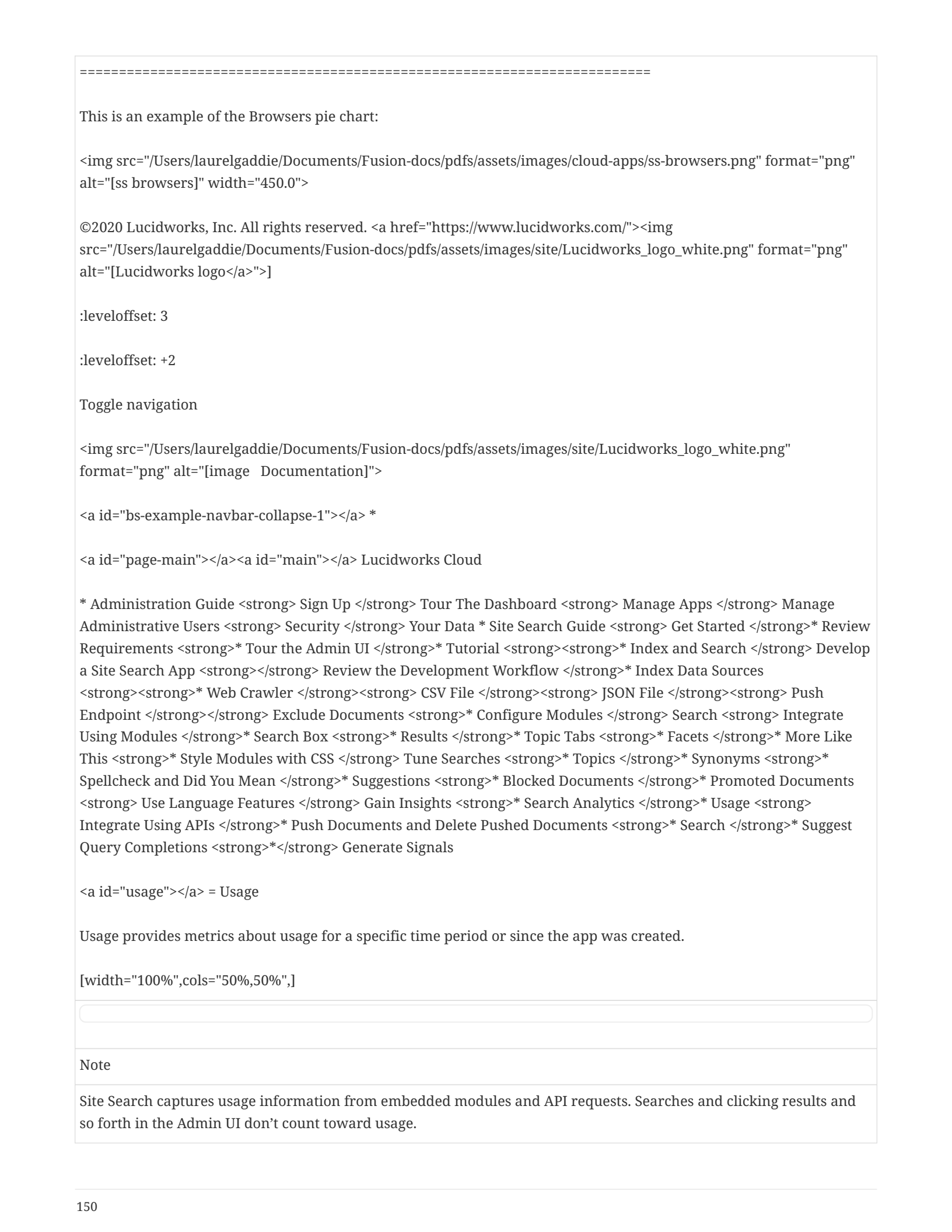
This is an example of the Top Queries that Gave No Results pie chart:



==========
Metric
Description
Browsers
Browsers from which users search, shown in a graph and a table
Devices
Devices from which users search, shown in a graph and a table
Top Sources of Searches
Top web pages and apps from which users search, shown in a graph and table

==========

This is an example of the Browsers pie chart:



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 = Usage

Usage provides metrics about usage for a specific time period or since the app was created.

[width="100%",cols="50%,50%",]

Note

Site Search captures usage information from embedded modules and API requests. Searches and clicking results and so forth in the Admin UI don’t count toward usage.

========== ==========
How to view usage 1. In the Site Search menu under Insights, click **Usage**. 2. (Optional) In the upper left, select a timeframe from the dropdown list – **All Time** (the default), **Today**, **Previous Week**, **Previous 30 Days**, or **Previous 90 Days**; the previous periods don't include today. To specify a custom time period, select **Custom Time Period**, click **From date** and **To date** and select dates, and then click **done**. Usage metrics are: [cols=",",options="header",]
==========
Metric
Description
Searches Over Time
Graph showing a timeline of daily search totals
Average Queries per Day
Average number of search queries processed per day
Average Response Time
Average time it took to respond to queries
Click-through Rate
Percentage of the total queries that resulted in users clicking through to results
Busiest Days of the Week
Graph showing the total numbers of queries by the day of the week
Busiest Times of Day
Graph showing the total numbers of queries by the time of day

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 = Integrate Using APIs

* Manage API keys * API development workflow

Site Search has the following RESTful APIs:

[cols=",,",options="header",]

==========

Endpoint
Verb
API key
Use

`path/api/v1/push`
`POST`
Push API key
Post documents to a Push Endpoint data source.
`path/api/v1/push/id`
`DELETE`
Push API key
Remove index entries from a Push Endpoint data source for previously indexed documents.
`path/api/v1/search`
`GET`
Search API key
Search.
`path/api/v1/suggest`
`GET`
Search API key
Suggest query completions.
==========

Any app that can make HTTP requests can use the APIs, if it has a valid API key.

In the API examples, we use `curl` to send the HTTP requests. The default verb for `curl` is `GET`. It is omitted from the examples that use `GET`.

HTTP responses from Site Search can be so long that they exceed the command-length limits of shells (in which case the shells truncate the output). During app development and testing, you might want to write HTTP responses to files.

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Note

Integration with websites and web apps is also possible using Site Search modules. For more information, see Integrate Using Modules.

==========

== Manage API keys

An app must include a valid Search API key or Push API key (depending on the nature of the request) in an `X-API-Key` header in the HTTP request.

Manage API keys in the Site Search app:

* **Push API keys** – In the Admin UI menu, select a Push Endpoint data source to manage Push API keys for that data source. Push API keys are specific to data sources (each data source can have one or more Push API keys). + Use Push API keys for the `push` endpoint (`path/api/v1/push`). * **Search API keys** – In the Admin UI menu, click **Search APIss**. + Use Search API keys for the `search` endpoint (`path/api/v1/search` and the `suggest` endpoint (`path/api/v1/suggest`). + [width="100%",cols="50%,50%",]

Tip

For a specific Site Search app, you can use a single Search API key for all search apps that use Search API calls, or use multiple keys, for example, one per search app. Using multiple keys lets you turn off searches for a specific specific app by revoking that app's Search API key. The same is true of the other API keys.

==========

 == API development workflow

If you use Site Search APIs to develop a search app, the basic workflow is similar to the workflow when using embedded modules to develop an app, but instead of embedding modules you will write code that calls Site Search APIs.

Some tuning of search results in the Admin UI affects the results that users obtain through the Site Search APIs; specifically topics, synonyms, blocked documents, and promoted documents.

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* Administration Guide Sign Up Tour The Dashboard Manage Apps Manage Administrative Users Security Your Data * Site Search Guide Get Started * Review Requirements * Tour the Admin UI * Tutorial * Index and Search Develop a Site Search App Review the Development Workflow * Index Data Sources * Web Crawler CSV File JSON File Push Endpoint Exclude Documents * Configure Modules Search Integrate Using Modules * Search Box * Results * Topic Tabs * Facets * More Like This * Style Modules with CSS Tune Searches * Topics * Synonyms * Spellcheck and Did You Mean * Suggestions * Blocked Documents * Promoted Documents Use Language Features Gain Insights * Search Analytics * Usage Integrate Using APIs * Push Documents and Delete Pushed Documents * Search * Suggest Query Completions * Generate Signals

 = Push

* Manage Push API keys * Push new documents JSON payload requirements and recommendations * Makeup of a push request * HTTP request header * REST verb * Push API endpoint * Request parameters * JSON syntax for pushing a single document * JSON syntax for pushing multiple documents

Note

You must specify the push endpoint and API key for a *specific* push endpoint. If there is more than one Push Endpoint data source then, when updating or deleting documents, you must know with which data source documents are associated.

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== Push new documents

Use the Push API to push new documents to a Push Endpoint data source. A document is taken to be new if no documents in the index have a matching `id` field. Site Search adds the new records to the index.

The format of the document payload in the request is JSON. You can push documents one at a time, or push multiple documents in a single JSON document.

==== JSON payload requirements and recommendations

Note the following requirements and recommendations for the JSON payload:

* In the JSON payload, `id` and `name` are required fields. These fields must be string fields (surround each field in escaped double quotation marks). For example: + [source,pygments,highlight] ---- { "id": "doc-id-1", "name": "Document name 1", "description": "test doc", "url": "http://url_to_doc_id1" } ---- * You can include any other fields that you like. We recommend that you include `description` and `url` fields. These fields help Site Search do intelligent things with the pushed records. * The fields can be in any order.

=== Makeup of a push request

A push request for adding a new document has these parts:

* A Push API key – Use a Push API key for the Push Endpoint data source to which you want to push the document. Site Search uses the Push API key to authorize the request. * HTTP request header – An `X-API-Key` request header contains the Push API key. * REST verb – Push uses the REST verb POST. * REST endpoint – Use the REST endpoint for the Push API data source to which you want to push the document. * Request parameters – The API request has no parameters. Identify the document payload for the POST, for example, using the `-d` parameter in `curl`. * A reference to a JSON file (or a JSON payload in the request) that contains a single document or multiple documents.

=== HTTP request header

An HTTP request for the Search API must contain the `X-API-Key` header, a custom HTTP header to contain the Search API key.

=== REST verb

The REST verb for pushing documents is `POST`.

=== Push API endpoint

The URI of the Push API endpoint is:

[source,pygments,highlight] ---- https://subdomain.lucidworks.cloud/pathname/api/v1/push/endpoint ----

Note

You must specify the push endpoint and API key for a *specific* push endpoint. If there is more than one Push Endpoint data source then, when updating or deleting documents, you must know with which data source documents are associated.

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=== Request parameters

The API request has no parameters. Identify the JSON document payload for the POST, for example, using the `-d` parameter in `curl`.

=== JSON syntax for pushing a single document

A JSON file for a request to push a single document contains a single JSON object that specifies the fields and values of the single document as key/value pairs.

This is the syntax:

[source,pygments,highlight] ---- {"id": "*value*", "name": "*value*", "*field3*": "*value*", "*field4*": "*value*", ...} ----

This is an example:

[source,pygments,highlight] ---- {"id": "doc-id-1", "name": "Document name 1", "description": "An example", "url": "https://www.example.com"} ----

Also see the requirements and recommendations for the makeup of the JSON payload.

=== JSON syntax for pushing multiple documents

A JSON file for a request to push multiple documents contains a single JSON array of JSON objects. Each JSON object specifies the fields and values of a single document as key/value pairs.

This is the syntax:

[source,pygments,highlight] ---- [{"id": "*id-value1*", "name": "*name-value1*", "*field3*": "*value*", "*field4*": "*value*", ...}, {"id": "*id-value2*", "name": "*name-value2*", "*field3*": "*value*", "*field4*": "*value*", ...}, {"id": "*id-value3*", "name": "*name-value3*", "*field3*": "*value*", "*field4*": "*value*", ...}, ... {"id": "*id-valueN*", "name": "*name-valueN*", "*field3*": "*value*", "*field4*": "*value*", ...}] ----

This is an example:

[source,pygments,highlight] ---- [{"id": "doc-id-1", "name": "Document name 1", "description": "A doc website", "url": "https://www.docs.com"}, {"id": "doc-id-2", "name": "Document name 2", "description": "A product website", "url": "https://www.products.com"}] ----

Also see the requirements and recommendations for the makeup of the JSON payload.

== Update existing documents

Use the Push API to push updated documents to a Push Endpoint data source. To update a document, push a document with the same value in the `id` field to the Push API endpoint *for the same Push Endpoint data source*.

Note

You must specify the push endpoint and API key for a *specific* push endpoint. If there is more than one Push Endpoint data source then, when updating or deleting documents, you must know with which data source documents are associated.

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=== Request parameters

The API request has no parameters. Identify the JSON document payload for the POST, for example, using the `-d` parameter in `curl`.

=== JSON syntax

The JSON syntax for updating single documents is the same as for pushing new documents singly. For updating multiple documents, the syntax is the same as for pushing multiple new documents.

== Delete documents

Use the Push API to delete document from a Push Endpoint data source (that is, to delete index entries for previously pushed documents). You must delete documents one at a time (one document per request).

You might want to delete documents, that is, to remove the index entries for previously pushed documents. To do this, you use the Push API endpoint and Push API key *for the Push Endpoint data source to which the document was pushed*, but with the verb `DELETE` instead of `POST`. You must delete documents one at a time.

=== Makeup of a deletion request

A push request for deleting a document has these parts:

* A Push API key – Use a Push API key for the Push Endpoint data source to which you want to push the document. Site Search uses the Push API key to authorize the request. * HTTP request header – An `X-API-Key` request header contains the Push API key. * REST verb – Deleting a document uses the REST verb DELETE. * REST endpoint – Use the REST endpoint for the Push API data source from which you want to delete the document. * Request parameters – The API request has no parameters. Identify the document you want to delete by it's ID, appended to the push endpoint URL.

=== HTTP request header

An HTTP request for the Search API must contain the `X-API-Key` header, a custom HTTP header to contain the Search API key.

=== REST verb

The REST verb for deleting documents is `DELETE`.

=== Push API endpoint

This is the syntax showing the push endpoint and the document ID:

[source,pygments,highlight] ---- https://subdomain.lucidworks.cloud/pathname/api/v1/push/endpoint/id ----

This is an example URL:

Note

You must specify the push endpoint and API key for a *specific* push endpoint. If there is more than one Push Endpoint data source then, when updating or deleting documents, you must know with which data source documents are associated.

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=== Request parameters

The API request has no parameters. Identify the document you want to delete by its ID, appended to the push endpoint URL.

== Examples

The are Push API examples.

=== Push a single document

[source,pygments,highlight] ---- curl -X POST \ {push-endpoint} \ -H 'Content-Type: application/json' \ -H 'x-api-key: YOUR_API_KEY_HERE' \ -d '{\"id\": \"doc-id-1\", \"name\": \"Document name 1\", \"description\": \"A test description\", \"url\": \"www.example.com\"}' ----

=== Push multiple documents

[source,pygments,highlight] ---- curl -X POST \ {push-endpoint} \ -H 'Content-Type: application/json' \ -H 'x-api-key: YOUR_API_KEY_HERE' \ -d '[{\"id\": \"doc1\", \"name\": \"Document name 1\", \"description\": \"A test description\", \"url\": \"www.example.com\"}, {\"id\": \"doc2\", \"name\": \"Document name 2\", \"description\": \"Another description\", \"url\": \"www.other.com\"}]' ----

=== Delete a document

[source,pygments,highlight] ---- curl -X DELETE \ https://subdomain.lucidworks.cloud/pathname/api/v1/push/endpoint/id \ -H 'x-api-key: YOUR_API_KEY_HERE' ----

== Committing changes

For single documents and multiple documents, Site Search commits push requests as soon as they are received. By "commit," we mean making the changes in the data source.

For delete requests, Site Search groups incoming requests and commits them periodically (once a minute).

If you want to commit a deletion more quickly, you can include `commit=true` as a URL parameter in the deletion request. For example:

[source,pygments,highlight] ---- curl -X DELETE \ https://subdomain.lucidworks.cloud/pathname/api/v1/push/endpoint/id?commit=true \ -H 'x-api-key: YOUR_API_KEY_HERE' ----

[width="100%",cols="50%,50%",]

Tip

If you submit multiple push requests, each for a single document, then not committing every deletion immediately is more efficient.

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* Administration Guide Sign Up Tour The Dashboard Manage Apps Manage Administrative Users Security Your Data * Site Search Guide Get Started * Review Requirements * Tour the Admin UI * Tutorial * Index and Search Develop a Site Search App Review the Development Workflow * Index Data Sources * Web Crawler CSV File JSON File Push Endpoint Exclude Documents * Configure Modules Search Integrate Using Modules * Search Box * Results * Topic Tabs * Facets * More Like This * Style Modules with CSS Tune Searches * Topics * Synonyms * Spellcheck and Did You Mean * Suggestions * Blocked Documents * Promoted Documents Use Language Features Gain Insights * Search Analytics * Usage Integrate Using APIs * Push Documents and Delete Pushed Documents * Search * Suggest Query Completions * Generate Signals

 = Search

* Manage Search API keys Create a Search API key Enter or update a key’s comment (description) Delete a key * Search for documents Makeup of a search request HTTP request header REST verb Search API endpoint Request parameters * Filters * Examples Return all fields for a single document ** Return three fields for the second page of five documents

Use the Search API to perform searches.

 == Manage Search API keys

To submit a request to the Search API (either the <code>/search</code> or <code>/suggest</code> endpoint), an app must include a valid Search API key in an <code>X-API-Key</code> header in the HTTP request.

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Tip

For a specific Site Search app, you can use a single Search API key for all search apps that use Search API calls, or use multiple keys, for example, one per search app. Using multiple keys lets you turn off searches for a specific specific app by revoking that app's Search API key.

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=== Create a Search API key

How to create a Search API key

1. In the Site Search menu, click **Search APIs**. 2. Click **Generate a New Key** to generate a Search API key. + Your Search API key is listed. Click **Download API key** to download a `search-api-key.json` file that contains the key. Or write the key down or copy it somewhere. It won't be shown again. 3. Under **Search for results**, Site Search displays an example of a `curl` command with the GET request to search. + To copy the sample `curl` command, hover over it and click **Copy**.

=== Enter or update a key's comment (description)

How to enter or update a key's comment

1. In the Site Search menu, click **Search APIs**. 2. Click in the **Comment** field of the Search API key for which you want to enter or update the comment. 3. Enter or update the comment.

=== Delete a key

How to delete a key

1. In the Site Search menu, click **Search APIs**. 2. Hover over the Search API key you want to delete, and then click Delete .

== Search for documents

Use the Search API to search for documents.

=== Makeup of a search request

A search request has these parts:

* A Search API key – Site Search uses the Search API key to authorize a search. * HTTP request header – An `X-API-Key` request header contains the Search API key. * REST verb – Search uses the REST verb GET. * Search API endpoint – Search uses the REST endpoint for the Search API. * Request parameters – These parameters specify what to search for and which results to return.

=== HTTP request header

An HTTP request for the Search API must contain the `X-API-Key` header, a custom HTTP header to contain the Search API key.

=== REST verb

The REST verb for searches is `GET`.

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Parameter
Description and Example
Type
Default
`q`
Query term to search for `q=fusion server`
string
`:` (all documents)
`f`
Query filter or filters to apply A query filter constrains the search results based on the value of a field (the value or values are in square brackets). To constrain based on multiple fields, include multiple `f` parameters. `f=department['computers']&f=category['accessories']` [width="100%",cols="50%,50%",]
Note
Surround the values in the square brackets with single or double quotation marks. For multiple values of one field (logical OR), repeat multiple `f` parameters (one for every term) and put an asterisk (`) at the end of each `f` value (for example, `f=department['computers']&f=department['accessories']*`). For more than one field, include multiple `f` parameters.
string, integer, or float

none

`rpp`

Results per page

`rpp=10`

integer

10

`p`

Page of results to show

`p=6`

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Tip

You will need to do the math on pagination. If the API response reports 34 hits and there are 10 results per page, then requesting page 5 will return page 4, along with a warning message at the end of the response: `Requested 5 pages when only 4 are available.

integer

1

`s`

List of fields to sort by

`s=+popularity&-price`

Preface the field with `+` for ascending order or `-` for descending order. To sort by multiple fields, separate them with ampersands (`&`). In the example shown here, sorting is first by popularity (ascending) and then by price (descending)

string, multivalued

none

`fi`
List of fields to return `fi=id,department,description,price` If you don't specify which fields to return, the Search API returns *all* fields. Use this to determine which fields are available, and for debugging.
comma-separated list
all fields
`fa`
List of fields to facet on `fa=department,category`
comma-separated list
none
`topics`
List of topics (or single topic) to which to restrict the search `topics=press_releases,news`
comma-separated list
none
========== ========== ========== ========== [width="100%",cols="50%,50%",]
Note
If a parameter value contains a reserved character, URL encode the character. You might also need to encode other characters. For example, a query parameter for `fusion server` would be `q=fusion%20server` or `q=fusion+server`.

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== Filters

To produce the desired query term, you can apply multiple filters by combining multiple `f` parameters. You can combine `f` parameters in these ways:

[cols=",,",options="header",]

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Combination
Description
Example
Logical conjunction (AND)
Apply individual filters (`&f=`) to the query using logical conjunction (AND). The documents returned must satisfy all filter conditions. To use logical conjunction, include multiple filters in the query URL.

`&f=foo['bar']&f=marx['groucho']`
 	
This results in a query like:
 	
`foo:bar AND marx:groucho`

Fully optional condition (OR)
Apply individual filters (`&f=`) to the query using logical disjunction (OR). Each document returned must satisfy one of the filter conditions. To make a filter's condition fully optional, include a `~` (tilde) character before the field name in the query URL.

`&f=foo['bar']&f=~marx['groucho']&f=~marx['harpo']*`
 	
This results in a query like:
 	
`foo:bar OR marx:groucho OR marx:harpo`

Alternative values for a given field

Apply individual filters (`&f=`) *for different values of the same field* using an OR operator. Then combine that pair (or larger group) of filters with the rest of the filters using a logical AND. Each document returned must have one of the alternative values for the given field, and it must satisfy other filter conditions.

To specify alternative values for a given field, include an `*` (asterisk) character after the filter value in the query URL.

```
&f=foo['bar']&f=marx['groucho']&f=marx['harpo']
```

This results in a query like:

```
foo:bar AND (marx:groucho OR marx:harpo)
```

[width="100%",cols="50%,50%",]

Note

This is the recommended approach when using checkboxes to select values within a facet. In this case, the default behavior is to let the user select multiple options which are combined using an OR.

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 == Examples

These are examples of Search API requests and responses. Both requests and responses depend on what data you have indexed. Here, we indexed parts of the <code>https:/doc.lucidworks.com</code> website.

Also see Search API examples for Spellchecking and Did You Mean.

 === Return all fields for a single document

During development, it can be useful to view all fields that are available for a data source. This <code>curl</code> command omits the <code>f</code> parameter, so the Search API returns all fields. The parameter <code>p</code> is also omitted, so the first page of results is returned. Setting the parameter <code>rpp</code> to <code>1</code> causes (with the implied <code>p=1</code>) a single result to be returned. The search was for <code>q=cloud</code>, a term that was expected to be present.

Request

[source,pygments,highlight] ---- curl -H 'X-API-Key: YOUR_API_KEY' 'https://subdomain.lucidworks.cloud/pathname/api/v1/search?p=1&rpp=1&q=cloud' ----

Response

This is an example of the response. The response contains fields you expect from the data source and from field mapping, as well as ones that Fusion and Site Search use.

Notice:

* The query: <code>"query"</code> * The number of results: <code>"hits" : { "act" : ["Long", 34]</code> * Pagination: <code>"page"</code> * Specific results: <code>"result"</code> * Fields: <code>"fields"</code> * Messages: <code>"messages"</code> (none in this case)

[source,pygments,highlight] ---- { "query" : { "target" : "", "filters" : [ ], "type" : "any", "fields" : "", "view" : "", "collection" : "", "autoCorrected" : false, "facts" : { }, "transientParameters" : ["fa"], "val" : "cloud", "rpp" : 1, "facets-enabled" : true, "max" : -1, "page" : 1, "facets" : "", "sorts" : [ ], "custom" : { }, "other" : { }, "default" : false }, "hits" : { "act" : ["Long", 34] }, "page" : 1, "results" : [{ "result" : { "id" : "https://doc.lucidworks.com/lucidworks-cloud/index.html", "fields" : { "mimeType_s" : { "name" : "mimeType_s", "val" : ["text/html"] }, "meta_tag_name_publisheddate" : { "name" : "meta_tag_name_publisheddate", "val" : ["2018-05-15 23:59:07 +0000"] }, "lw_parser_id_s" : { "name" : "_lw_parser_id_s", "val" : ["c8644a3a-a2ba-4342-9d71-082e14cba3dd"] }, "_cloud_fields_ss" : { "name" : "_cloud_fields_ss", "val" : ["domain", "file_extension", "file_name", "meta_tag_charset", "name", "meta_tag_name_viewport", "description", "url", "path_1", "meta_tag_name_publisheddate", "type", "meta_tag_name_description"] }, "description" : { "name" : "description", "val" : ["Lucidworks Cloud apps provide many of the powerful features of Fusion with the simplicity of SaaS, and without the overhead of on-premises deployment. Lucidworks Cloud apps share the same administration interface and offer secure data ingestion."] }, "_lw_data_source_collection_s" : { "name" :

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Parameter
Description and example
Type
Default
`q`
Query term to search for `q=fusio`
string
Not applicable

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 == Obtaining suggested query completions

Here we describe how to obtain suggested query completions. We also give some information about handling responses.

 === Submit a request

In your app, construct and submit HTTP requests to the Search API. These are example requests and responses:

In the Site Search app, you can copy a sample <code>curl</code> command that submits a request.

How to use the sample request

1. In the Site Search menu, click Search APIs. 2. Under "Suggest query completiongs", hover over the sample <code>curl</code> command, and then click Copy. 3. Paste the command into a text editor. 4. Include a Search API key and modify the search-request parameters as desired. 5. Submit the <code>curl</code> command at a command prompt.

 == Example

This is an example of a request for suggested query completions for <code>justi</code>.

Request

[source,pygments,highlight] ---- curl -H 'X-API-Key: 7556b805-662d-44c8-b467-d8cb0fa476e56765f6e6-dd60-4fdc-9c53-d8c03edb3a2e' 'https://fusion-search.lucidworks.cloud/search-3/api/v1/suggest?topics=la_presse&q=justi' ----

Response

[source,pygments,highlight] ---- ["justice", "justin", "justify", "justine", "justifier", "justified", "justification", "justices", "justifiant", "justifie"] ----

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src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/site/Lucidworks_logo_white.png" format="png" alt="[Lucidworks logo"]

:leveloffset: 3

:leveloffset: +2

Toggle navigation

src="/Users/laurelgaddie/Documents/Fusion-docs/pdfs/assets/images/site/Lucidworks_logo_white.png" format="png" alt="[image Documentation]">

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========== ========== ==========
Parameter
Description and example
Type
`url`
URL of the web page to which the user is taken by clicking the result. `https://doc.lucidworks.com/lucidworks-cloud/index.html`
string
`label`
Label of the search result `Lucidworks Cloud documentation`
string
`rpp` (under `query`)
Results per page `rpp=10`
integer
`fi` (under `query`)
List of fields that were used in the query `fi=original_title_t,poster_path_ss,genre_ss,year_i,overview_txt,id`
comma-separated list
`type`

Type of the item that is clicked. This must be `result`. `type=result`
string
`id`
ID of the document that is clicked. Specify the `id` of a document returned in a query. This connects a document returned in a query response with the clicked document. For a Web Crawler data source, this is typically the URL of the document. `id=https://doc.lucidworks.com/lucidworks-cloud/index.html\`
integer
`pos`
Position of the result that is clicked (that is, the page) `pos=1`
integer
`offset`
Offset in the results `offset=4`
integer
`platform`
Static parameter that is always set to platforms.fusion.main.search. `platform=platforms.fusion.main.search`
string
`fusionQueryId`
A parameter passed in by the query object `fusionQueryId=\`q=9Ys1hu`

string
`q`
The search terms you are querying on `q=&`
string
`c`
The language you are using for search. `c=language[en]`
string
`p`
Page of results `p=1`
integer
`fa`
Facets in fa parameter of the query `fa=domain_str,Cgenres_str,Ccast_info.actor_name_str`
comma-separated list
========== ========== ========== [width="100%",cols="50%,50%",]
Note
If a parameter value contains a reserved character, URL encode the character. You might also need to encode other characters. For example, a query parameter for `fusion server` would be `q=fusion%20server` or `q=fusion+server`.

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 == Example

The starting point is a search query, for example:

Request

[source,pygments,highlight] ---- curl -H 'X-API-Key: YOUR_API_KEY' 'https://subdomain.lucidworks.cloud/pathname/api/v1/search?p=2&rpp=5&fi=name,url,description&q=cloud' ----

Response

In this excerpt from the response to the search query, the ID is the long URL:

[source,pygments,highlight] ---- "page" : 1, "results" : [{ "result" : { "id" : "https://doc.lucidworks.com/lucidworks-cloud/index.html", "fields" : { "mimeType_s" : { "name" : "mimeType_s", "val" : ["text/html"] }, ----

Signal post

This is a signal post that specifies the same document ID (in the field `id), as well as other fields:

[source,pygments,highlight] ---- POST https://mycompany.lucidworks.cloud/search/api/v1/activity/clicks

{ "url": "https://doc.lucidworks.com/lucidworks-cloud/index.html", "label": "Lucidworks Cloud", "query": { "rpp": "20", "fi": "mimeType_s,description,type,file_name,url,id", }, "type": "result", "id": "https://doc.lucidworks.com/lucidworks-cloud/index.html", "pos": 1, "offset": 0 } ----

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