This document forms part of The Open University’s suite of web standards, available online at www.open.ac.uk/about/web-standards.
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1. **Introduction**

The OU Web Search Principles have been prepared as part of an overall digital governance review led by Digital Engagement. The [OU Search Working Group](#) has been set up to create and maintain the OU’s standards and guidelines for ensuring that content on public facing and internal websites is appropriately indexed and presented in search results.

This document is intended as a practical working guide for use by:

- anyone with responsibility for web content (including third party content)
- anyone who develops new or existing web systems

This document should be read in conjunction with other Open University [web standards](#).

2. **OU Search**

2.1 **Principles**

The principles set out below are based on foundational search patterns which form the basis of “best practice” design for website search. Adherence to these principles will be mandatory and ensure a consistent search experience across the OU web domain.

2.2 **Search Box**

1. The OU Search box MUST be included as part of the page header on all OU website pages. This is deployed via the use of the OU Standard Header, see OU Public header and [OU Intranet header](#).

2. All searches initiated from this location MUST be directed to a common results template based on user context (e.g. Public, Intranet, Student, or a variant previously agreed by the Search Working Group).

2.3 **Results Page**

3. The search results page MUST show the number of search results returned

4. Keywords in the search result titles MUST be highlighted

5. Keywords in the search result snippets MUST be highlighted

6. The search results page MUST provide search tips when zero results are return

7. The search results page MUST allow query revision.

2.4 **Content**

Content to be included in OU search sites:

8. MUST be located within the OU IA (Public, Intranet, Student)

9. Content within Public search MUST NOT require a user to sign-in
10. Web pages and documents MUST meet the minimum requirements for Metadata as outlined in the Metadata Standard.

2.5 Site Specific Search

11. Sites MUST NOT deploy site-specific searches unless an exemption has been applied for and agreed by the Search Working group. The OU Web Standards include a process for requesting exemptions from the guidelines, see the requesting an exemption page.

12. To qualify for an exemption sites MUST demonstrate the need for search functionality not covered by the Global OU Search and demonstrate the benefits of the functionality delivered vs the additional cost of development and maintenance.

13. Once an exemption has been agreed by the Search Working Group an IT Business Case will be required if it is to be delivered by IT.

14. Where exemptions are given the search box MUST be located within the body of the site and the function of the search MUST be clearly indicated. This will be in addition to the main OU header which will also contain the global OU search box.

2.6 Authorised search instances and Business Owners

- Public Search http://search.open.ac.uk/ - Digital Engagement
- Intranet Search http://search.open.ac.uk/internal - Digital Engagement
- Module search http://search.open.ac.uk/module - LTS
- PST http://search.open.ac.uk/pst - Student Services
- OpenLearn http://search.open.ac.uk/openlearn/ - OMU
- Sourcepool http://search.open.ac.uk/sourcepool/ - IT
- ISA (Globaldirect) http://www.openuniversity.edu/international/search/ - BDU
- PeopleProfiles http://search.open.ac.uk/people/research/ - Digital Engagement

2.7 Additional search API consumptions

- Learn
- Learn2
- Course finder
- OpenLearn Works (Labspace)

2.8 Authorised Exemptions

- OU Library resource search http://www.open.ac.uk/library/
- Open Research Online http://oro.open.ac.uk/
- OU Digital Archive http://ouda.open.ac.uk/
3. **Search management principles**

1. No web sites will be added or removed from the search index without the knowledge and approval of the Business Owners (see above). Requests for addition or removal will be made via Digital Engagement and the Search Working Group.

2. No additional site collections should be added or removed without the knowledge and approval of the above business owners and ratified by the Search Working Group.

3. For a new site collection, the collection MUST be reviewed on a development or acceptance test environment, before going live, so that we can review the impact on the live user interface.

4. SharePoint sites are not indexed in Intranet search. However, a site can be found by adding the site title, keywords and summary to the search configuration. This is only done at the request of the site owner via the SharePoint search request form.

5. Boosts (also known as ‘best bets’) are only to be made following approval by the search business owners.

6. Requests for search inclusion must be requested to, and approved by, the search business owners and not directly to IT. Any such requests to IT should be referred to the business owners.

7. Learn content (VLE) is not indexed in intranet search. However, staff resources hosted in the VLE can be surfaced by adding the site title, keywords and summary to the search configuration. The VLE business owner should make this request to the OU Intranet Search business owner.

8. Tutor Home will not be indexed in intranet search, however, a link to Tutor Home search is provided.
4. **Search management process**

4.1 Adding new sites to the search crawler and site section config file

1. Site will be identified for indexing in search:
   - via the web site creation process at site launch, OR
   - if SharePoint, via the Search request form completed by site owner and submitted to DE
   - via requests to the Search Working Group, normally through the search business owners.

2. The site must be approved for inclusion by the business owners (see above).

3. The site is tagged to the appropriate site section within the respective Public and Intranet IA and recorded in the Digital Engagement (DE) spreadsheet(s).

4. DE request via ticket to IT advising:
   - which site should be added to the crawler
   - which site section it should go under in the config file
   - for intranet, which SAMs auth ids should be applied to the site in the search configuration (if different from the default set of 00000005,00000008,INTRASVR)
   - SharePoint or VLE staff resources - the summary, keywords and site section needed for the xml.

5. IT to add the site to the crawler on acct and the site section to the respective acct config file and to advise DE (via the ticket) when this has been done.

6. DE to check search results are in place on acct and confirm (via the ticket) to IT.

7. IT to add the site to the crawler on live and the site section to the respective live config file and to advise DE (via the ticket) when this has been done.

8. DE to check search results in live and close ticket.

4.2 Removing sites from the search crawler

9. The DE spreadsheet will be updated, indicating its removal and when requested to IT.

10. An IT ticket is raised requesting the removal and marked for the attention of IT.

11. IT to advise (via the ticket) when the site has been removed from the crawler and the config file in the acct environment.

12. DE to check the site has been removed from acct and confirm to IT (via the ticket), requesting the site is removed from live.

13. IT to advise (via the ticket) when the site has been removed from the crawler and the config file in the live environment.

14. DE to check the site has been removed from live and close the ticket.

15. DE Spreadsheet updated to indicate that the site has been removed and when.
4.3 Business Console Management

Adding best bets/synonyms:

16. DE will add the best bet/synonym to the acct environment and test it works as expected. The DE team should check with the business owner before doing so.
17. Following testing, DE will make scheduled updates to the live system. These will be pushed through to live on a weekly basis (Thursday 9am-12am).
18. DE will send an email to it-service-management@open.ac.uk after they make the change (title of email “Exalead Intranet Search Updates” or “Exalead Public Search Updates”) – copying to Jonathan Fine and Tauseef Gill.
19. During a change freeze period, DE will send an email before making the updates and await confirmation from IT.
5. **Search Working Group Membership**

Paul Beeby (LTS Media)
Simon Budgen (OMU)
Guy Carberry (Student Support)
Leanne Daniels (Student Support)
Sarah Gamman (LTS Business Planning & Infrastructure)
Keith Gordon (IT Development)
Alma Hales (LTS Business Planning & Infrastructure)

**Victoria Keogh (Digital Engagement) (Chair)**
Elizabeth Mallett (Library Services)
Kevin Mcleod (IET)
Colin Morris (Marketing Communications)
Steve Parkinson (LTS)
Richard Nurse (Library Services)
Steve Rycroft (LTS, CLE)
Patrick Swannell (Marketing Communications)
Alex Twiselton (Digital Engagement)
Nicky Waters (Digital Engagement)

**Contacting the group**

In the first instance enquiries should be directed through the [Digital Engagement team](#).
## Document control

<table>
<thead>
<tr>
<th>Version</th>
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<th>Comment</th>
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<tr>
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