

2. **Rules:** Record whether the rule is an inclusion or exclusion rule.
3. **Details:** For inclusion rules, list all the selected crawling options for each rule.

URL	Rules	Details

File types:

1. **Extension:** List the extension for all file types to include or exclude.
2. **Included/Excluded:** Record whether the file type is included or excluded. This enables you to record the exclusion of a file type that is included by default, and the inclusion of any file types you plan to add.
3. **IFilter:** List whether the IFilter for each file type is provided by the system, is available from another source, or must be developed.

Extension	Included/Excluded	IFilter

Farm-level settings:

1. **Contact e-mail address:** Record the e-mail address for people to contact when there are problems with crawling content.
2. **Proxy server:** Record whether a proxy server is not used for crawling (No), or the address and port of the server.
3. **Bypass proxy:** Yes/No. Record whether to bypass the proxy for local addresses.
4. **Exclude addresses:** List any addresses that won't use the proxy server.
5. **Connection time:** Record the time in seconds the search server will wait for other services.
6. **Request time:** Record the time in seconds the search server will wait for requests.
7. **Ignore SSL certificate warnings:** Record whether to ignore SSL certificate name warnings.

Contact e-mail address	
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Proxy server	Bypass proxy	Exclude addresses	Connection time	Request time	Ignore SSL certificate warnings

Crawler impact rules:

1. **Site:** Record the site URL for each crawler impact rule.
2. **Number of document requests/ Wait time between requests:** For each site URL, record either a number for simultaneous document requests on that server, or the wait time between requesting documents one at a time.

Site	Number of document requests	Wait time between requests

Plan for search queries: relevance

By scope

1. For each column, list every site in that relevance group.

Most authoritative	Second-level authoritative	Third-level authoritative	Less relevant

Plan for search queries: search properties

See the "Plan for search properties" planning worksheet.

Plan for search queries: server name mappings

- For each server name mapping, list the location and display URLs.

Location URL	Display URL

Plan for search queries: keywords

1. **Keyword phrase:** List each keyword phrase.
2. **Definitions:** List the definition(s) for each keyword phrase.
3. **Synonyms:** List the synonym(s) for each keyword phrase.
4. **Best Bets:** List the Best Bet(s) for each keyword.
5. **Site collection:** List the site collection that will create and use each keyword. Try to group all keywords for each site collection together.

Keyword phrase	Definitions	Synonyms	Best Bets	Site collection

Plan for search queries: keyword management

1. **Keyword phrase:** List the same keyword phrases listed in the previous table.
2. **Contact:** List the contact for each keyword.
3. **Start date:** List the start date for each keyword.

4. **Review date:** List the review date for each keyword.
5. **Expiration date:** List the expiration date for each keyword.

Keyword phrase	Contact	Start date	Review date	Expiration date