Exploring Search Query Rules in SharePoint 2013

Hands-On Lab
Lab Manual
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Exploring Search Query Rules in SharePoint 2013

Estimated time to complete this lab: **35 minutes**

**Lab Objectives**
Query rules, new in SharePoint 2013 Search, are used to define the ranking or display of search results. For example, a query rule can promote specific results or result types that would not otherwise rank near the top in a list ranked only by relevance. In this HOL, you will learn to configure and use query rules to modify search results. First, you will open an out-of-the-box query rule, explore its settings and how it works, and then modify it to show how search results are affected. You will then learn how to create a custom query rule that returns search results tailored for each user.

After completing this lab, you will be better able to:
- Open a query rule explore its settings and options, and see it in action.
- Edit the rule in one or more ways that impact search results and how they are presented.
- Demonstrate how query rules can be customized to promote results based on a person’s user profile.

**Technologies**
- SharePoint 2013 Search

**Audience**
- SharePoint Site Administrators and SharePoint IT Professionals

**Scenario**
In this lab, you will learn how to access and open query rules for editing, modify a query rule to show impact on search results, and create a new rule that incorporates personalized information to achieve customized search results.

**Getting Started**

**Connect to the Lab Environment**
Log on to the SharePoint (SP) virtual machine (VM) as Garth Fort, with the credentials CONTOSO\GarthF, pass@word1.

**Open the Lab Environment**

1. To begin the lab, start Internet Explorer, navigate to the demo home page at http://intranet.contoso.com/sites/contoso and log on to SharePoint as Garth Fort with the following credentials:
   - Username: **CONTOSO\GarthF**
   - Password: **pass@word1**

2. Warm up Web Apps:
   a. Start in the demo home page.
b. In the upper navigation, click the down-arrow next to Resources and then click Document Center.

c. Click on a PowerPoint presentation and see it open in a Web App.

d. Click the back-arrow to return to the Document Center.

e. Repeat steps c and d for Word and Excel documents.

   Note: if you do not see a specific document type in the top view, in the left navigation click Documents and select from that list.

f. In the upper navigation, click Home to return to the demo home page.

Exercise 1 – Explore And Modify A Query Rule

Estimated time to complete this exercise: **15 minutes**

Scenario

In this exercise, you will open an out-of-the-box query rule and explore its settings. You will then perform a search that fires the rule. Next, you will temporarily disable the rule, create a copy, and make some modifications to its settings. Finally, you will repeat the search with the modified rule, and compare results with those you obtained from the original.

Task 1 – Open and Explore a Query Rule

In this task, you will explore an out-of-the-box query rule that promotes PowerPoint results.

1. In Internet Explorer, in the upper navigation, click **Search**.
2. In the upper right of the SharePoint window, click the **gear icon** and then click **Site Settings**.

3. In the Site Settings page, under **Search**, click **Query Rules**.
4. In the **Select a result source**... pull-down menu, select **Local SharePoint Results (System)**.

5. Scroll down, and under the **Provided by SharePoint** section, locate the **PowerPoint** rule.

6. Click the **PowerPoint** rule and then click **View**.

7. Briefly explore the **Conditions** and **Actions** settings.
   
a. Conditions define **when** the rule fires. Note specifically that the rule will fire if the query contains the term “deck” and other similar terms. These are “action” terms that are not part of the final search query, but tell the rule to fire if it is contained in the original query.

b. Actions define **what to do** if the rule fires. Note there will be a result block.
8. Under **Result Blocks**, click **View**.

9. In the result block definition window, expand **Settings**.

10. Briefly explore some of the settings and options in the result block definition:
   a. **Query section**: where the query and result source are defined.
   b. **Settings section**: where the result block should appear in the list of results (ranked within the core results), and what display templates to use (use standard templates defined by SharePoint result types).

11. Click **OK** to close the **View Result Block** window (you may need to scroll down).

12. Click **OK** to close the **View Query Rule** window.

13. In the upper left of the **Manage Query Rules** page, click the **SharePoint icon** to open a fresh search page.

14. In the query box, type **marketing campaign deck** and click the search icon.
15. Note the promoted result block containing PowerPoint results.

You will use this results page for comparison.

**Task 2 – Add a Promoted Result**

A promoted result can be a simple message, or a link to a specific location or item that you want to show at the top of the results list. In this task, you will create a promoted result, point it to a specific file (a PowerPoint presentation), and add a comment about it.

Because you cannot edit an out-of-the-box query rule, you will first create a copy of it, make modifications, and test the modified rule after temporarily disabling the original.

1. At the upper left of the search results page, right-click the SharePoint icon and select Open link in new tab, and then navigate to the new tab.
   
   You should see a fresh search page.

2. In the upper right of the new search page, click the gear icon and then click Site Settings.


4. In the Select a result source... pull-down menu, select Local SharePoint Results (System).

5. Scroll down and under Provided by SharePoint, find the PowerPoint rule.
6. Click the **PowerPoint** rule and then click **Copy**.

![PowerPoint rule and Copy button]

7. Scroll down to the **Actions** section, and under **Promoted Results**, click **Add Promoted Result**.

![Promoted Results section with Add Promoted Result button]

8. In the **Title** box, type **Check out this deck!**

9. In the **URL** box, cut/paste or type the following:

10. In the Description box, type This is a great introduction to marketing campaigns.

![Image of Add Promoted Result dialog box]

11. Click Save.

Task 3 – Modify Result Block Settings

Result blocks are very useful for promoting specific search results you want to see for a given query. A result block is a collection of results that appear if the query rule fires, and its contents are specified by a number of settings. In this task, you will change some of the result block settings.

1. Continue in the page for editing the PowerPoint – Copy rule.
2. Under Result Blocks, click edit.

![Image of Promoted Results and Result Blocks settings]

3. Change the Block Title to My recent presentations for “{subjectTerms}”.
5. Expand Settings and select This block is always shown above core results.
This setting insures that the block always appears. If the other setting is used, the block may or may not appear depending on the relevancy of the results in the block relative to the “core” results.

6. **Click Launch Query Builder.**
7. In the **Query text** box, add a space after the existing text, and then add **ModifiedBy:{User.Name}** to the search **Query text** (after the existing text; leave a space between the last item and the addition).

This addition filters the results to show only those authored by the current SharePoint user. It is a simple example of personalized search, which will be explored in more detail in Exercise 2.

8. Click **OK** to close the **Query Builder** window.

9. Scroll down if needed and click **OK** to close the **Edit Result Block** window.

10. Click **Save** to save the new query rule.

You will now temporarily disable the original PowerPoint query rule so that the modified rule will work independently.

11. In the **Manage Query Rules** page, scroll down to the section entitled **Provided by SharePoint** and locate the PowerPoint query rule.

12. Click the PowerPoint rule and then click **Make Inactive**.

   **Note:** This is the original rule; you will activate it again after testing the modified copy.
Task 4 – Test the Modified Query Rule

Having modified the PowerPoint query rule, you are now ready to see how your modifications affect the search results. In this task, you will conduct a search with the modified query rule, and will then observe the differences between the modified and original result pages.

1. At the upper left of the Manage Query Rules page, right-click the SharePoint icon and select Open link in new tab, and then navigate to the new tab.

2. Repeat the search on marketing campaign deck and compare the results with those obtained earlier.

3. Pause on one of the results and confirm that it has been “changed by” Garth Fort.

4. Note these differences:
   a. Promoted result (“Check out this deck!”)
   b. New result block (“My recent presentations for “marketing campaign””)
c. Personalized results

You will now delete the modified query rule and re-activate the original before moving on with the rest of the lab.

5. Navigate back to the Manage Query Rules page.

6. Pause on the PowerPoint – Copy rule, click the down-arrow, and then click Delete.

7. In the confirmation dialog box, click OK.

8. Scroll down and locate the original PowerPoint rule.

9. Pause on the PowerPoint rule, click the down-arrow, and then click Make Active.
By completing this exercise, you have learned how to:

- Open an out-of-the-box search query rule and viewed its settings
- Create a copy of the rule and modified it in several ways, including adding promoted result and modifying the result block.
- Compared the results obtained from the original and modified rules, and how the differences are due to the changes you made.

Exercise 2 – Create A Custom Query Rule

Estimated time to complete this exercise: 20 minutes

Scenario

In this exercise, you will learn to create a custom query rule that promotes results based on the user’s profile. For example, the rule could promote results that he or she authored, or a rule that would take into account the person’s interests or departmental affiliation. The same search conducted by a colleague may return different results, depending on the colleague’s profile.

Task 1 – Create a Query Rule to Promote Personalized Content

In this task, you will create a simple query rule that displays colleagues whose SharePoint profiles most closely matches that of the current user. The rule will fire on any query.

1. Start in the Manage Query Rules page.
   - If you closed this page, open a new demo home page, open Site Settings, and under Search, click Query Rules.
2. In the Select a result source… pull-down menu, select Local SharePoint Results (System).
3. Click **New Query Rule**.

4. Above **Query Conditions**, click the arrow to expand **Context**.

5. Create a new query rule with the following settings:
   a. **Rule name**: Personalized Query Rule
   b. **Context (sources)**: One of these sources: Local SharePoint Results
   c. **Context (categories)**: All categories
   d. **Context (user segments)**: All user segments
   e. **Query Conditions**: Click the **Remove Condition** link

   **Note**: the context is Local SharePoint Results, which means the promoted results will appear in a general search with the scope set to “Everything”. They will not appear in searches scoped to People, Videos, or Conversations.
6. Next to Actions, under Result Blocks, click Add Result Block.

7. In the Add Result Block page, make the following entries:
   a. Block Title: Colleagues who best match my profile
   b. Search this Source: Local People Results (System)
   c. Items: 2

   **Note:** the result source for the block is Local People Results, meaning the query will only search from that source.

8. Expand Settings and select This block is always shown above core results.

9. Clear the Configure Query box.

10. Click Launch Query Builder.

11. In the Build Your Query window, in the Query text box, copy/paste or type the following query text:

   **Hint:** some of the conditions are similar; to save time, type out the first one, copy/paste another one after it, and modify as needed.

   ```plaintext
   owstaxIdMetadataAllTagsInfo:{User.sps-responsibility} OR
   owstaxIdMetadataAllTagsInfo:{User.sps-skills} OR
   owstaxIdMetadataAllTagsInfo:{User.sps-interests} AND
   owstaxIdMetadataAllTagsInfo:{User.sps-department} -{User.Name}
   ```
Explanation of the query: The above query searches a managed property in people SharePoint profiles (the property that begin with owstaxIMetadata…). It returns individuals that share one or more responsibilities, skills, or interests with the current SharePoint user. The results include only individuals from the current user’s department. Finally, the query filters out the current user by placing a “-“ before {User.name}, because the current user is looking only for colleagues.

12. Click **Test Query** and confirm there are results in the preview.

   **Note:** your results may not exactly match the screen shot.

13. Click **OK** to save and close the **Build Your Query** window.

14. Scroll down if needed and click **OK** to save and close the **Add Result Block** window.

   **Note:** at this point, you could add other personalized result blocks, for example to return documents or posts authored by the current user.

15. Click **Save** to save the new query rule.

   **Note:** here and throughout this lab, if you see an “unexpected error” message, try refreshing the screen; that usually removes the error.

**Task 2 – Demonstrate the Rule**

You have just built the new query rule to promote personalized content in search. In this task, you will see the rule in action by showing that the results change when logged in as a different SharePoint user.
1. Right-click the **SharePoint icon** at the upper left, and then click **Open link in new tab**.

![SharePoint icon with arrow pointing to Open link in new tab option]

2. Conduct a search for **marketing campaign**.
   
   *Note:* the rule fires on any query, so the exact search does not matter.

3. Notice the promoted result block showing one or more colleagues.
   
   *Note:* your results may not exactly match the screen shot.

![Promoted result block showing colleagues]
4. Pause on the top colleague, and explore the information in his or her hover panel.

You will now show how the promoted result block changes for a different user.

5. From the Start menu, Shift-right-click Internet Explorer and then click Run as different user.

6. If presented with a login window, log on as Tony Krijnen using the credentials TonyK, pass@word1.

   Note: Tony is CVP of Finance, so he should see different colleagues than Garth Fort, who is in Sales and Marketing.

7. Browse to the demo home page http://intranet.contoso.com/sites/contoso and log on SharePoint as TonyK, pass@word1.

8. In the upper navigation, click Search to open a search page.

9. Conduct a search on marketing campaign.

10. If presented with a login window to W15-SP, log on as TonyK, pass@word1.
11. Notice the promoted result block, and that it contains results different from those when logged on as Garth Fort.

12. Pause on the top colleague, and explore the information in his or her hover panel.

By completing this exercise, you learned how to create, configure, and test a custom query rule the returns personalized results. You learned how to configure the result block, tested the rule using Query Builder, and then conducted a search to see the rule in action.

**Summary**

In this hands-on lab, you were introduced to some of the new and extended features Search query rules in SharePoint 2013. Specifically, in this lab, you learned to:

- Access search query rules from the site Settings page.
- Open a query rule and explore its settings.
- Copy the rule and modify its configuration, and tested the modifications.
- Create and test a custom query rule that promotes personalized results.