

USER MANUAL

SEMANTIC SEARCH

Webparts for SharePoint™

Version 1.9



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Table of Contents

1	Introduction.....	5
1.1	Product Overview	5
1.1.1	Provision of Taxonomies in SharePoint	5
1.1.2	Tagging of Documents	6
1.1.3	Semantic Search.....	6
1.2	What's New?.....	6
1.2.1	Version 1.9	6
1.2.2	Version 1.8.....	6
1.2.3	Version 1.7	7
1.2.4	Version 1.6	7
1.2.5	Version 1.5.....	8
1.2.6	Version 1.4	8
1.2.7	Version 1.3.....	9
1.2.8	Version 1.2.....	10
1.2.9	Version 1.1	10
1.2.10	Version 1.0.....	10
2	Administration Guide	11
2.1	Software prerequisites	11
2.2	Installation	11
2.3	De-Installation	14
3	User Guide	16
3.1	TermTreeRefiner Webpart.....	16
3.1.1	Configuration for SharePoint 2016	16
3.1.2	Configuration for SharePoint 2013.....	26
3.1.3	Configuration for SharePoint 2010.....	34
3.1.4	Usage.....	35
3.2	QueryFacets Webpart	37
3.2.1	Configuration for SharePoint 2016 and 2013	38
3.2.2	Usage.....	42
3.3	SearchPageLayout Pagelayout.....	43
3.3.1	Configuration for SharePoint 2016 and 2013	43
3.3.2	Usage.....	54
3.4	StaticTermTree-Webpart.....	58
3.4.1	Configuration for SharePoint 2016.....	58
3.4.2	Configuration for SharePoint 2013.....	69
3.4.3	Usage.....	77
3.5	TermSuggester Webpart.....	78
3.5.1	Configuration for SharePoint 2016 and 2013	78
3.5.2	Usage.....	81
3.6	MatchingTerms Webpart.....	82
3.6.1	Configuration for SharePoint 2016 and 2013	82
3.6.2	Configuration for SharePoint 2010.....	85
3.6.3	Usage.....	87
3.7	RelatedTerms Webpart	88

3.7.1	Configuration	88
3.7.2	Usage.....	90
3.8	URL Template.....	91
3.8.1	SharePoint 2016 and 2013.....	91
3.8.2	SharePoint 2010.....	91
4	Technical Support.....	93
4.1	Download new releases of Semantic Search Webparts	93
4.2	Support inquiries	93
4.3	Check current bug-status	93
4.4	Buying a license.....	93

1 Introduction

Semantic Search Webparts for SharePoint extend the standard SharePoint-Search with Semantic Web features to find documents quicker and more efficiently. They make use of taxonomies that are enriched with semantic information. They guide users actively in the search process, offer alternative search possibilities and provide comprehensive ways to navigate in search hits.

This document contains all the information needed to install and use this product from **DIQA Projektmanagement GmbH**:

- Product overview,
- Administration guide, incl. pre-requisites, installation, and activation
- User guide including configuration, and
- Technical support.

Note:

All bug-IDs given refer to DIQA's bugtracker, which is located at:

<http://bugs.diqa-pm.com>

1.1 Product Overview

The **Semantic Search Webparts** are an element of DIQA's findability solution for SharePoint. The solution provides products and an approach that leverages taxonomies and Semantic Web technologies to improve document retrieval in SharePoint. The typical steps of the approach are explained in the following.

1.1.1 Provision of Taxonomies in SharePoint

The taxonomy represents the conceptual model of your business. It provides the required knowledge to improve navigation, as well as tagging and search of documents. Typical sources of taxonomies are industry standards, product lifecycle management systems, or terminology management systems.

Our SharePoint solution "**GRASP**"¹ helps to integrate external taxonomies, to manage taxonomies directly in SharePoint and to enrich them with semantic information.

¹ <http://diqa-pm.com/en/GRASP>

1.1.2 Tagging of Documents

Assign taxonomies and term sets to managed metadata columns that are used in lists or libraries. You can classify your documents manually by tagging them with terms (e.g. products, customers, regions, topics etc.). Alternatively, you can automate this process (requires partner products).

1.1.3 Semantic Search

The Semantic Search Webparts extend the standard SharePoint-Search with Semantic Web features to find documents quicker and more efficiently. The Semantic Search Webparts make use of the taxonomy that is enriched with semantic information. They guide users actively in the search process, offer alternative search possibilities and provide comprehensive ways to navigate in search hits.

1.2 What's New?

1.2.1 Version 1.9

New Features in v1.9:

- The Semantic Search Webparts are available for SharePoint 2013 and 2016 now.

Bugfixes in Semantic Search Webparts 2016 build 18:

- Bug #888 - Empty tree if current UI language is no working language in the termstore

Bugfixes in Semantic Search Webparts 2013 build 76:

- Bug #885 - Überflüssiges <hr> bei deaktiviertem "selektierte facetten anzeigen"
- Bug #884 - Searchstring contains "Search..." for empty searches

1.2.2 Version 1.8

New Features in v1.8 (B68):

- StaticTermTree:
 - Show the result count per term
 - Hide terms without results
 - Additional configuration options: maximum number of search result, query text and result source
 - NOTE: the configuration of the result source has been changed! Please refer to section "6.3 Enter the ID of the result source into the field "Result Source ID".

Bugfixes:

Semantic Search Webparts
User Manual

- "Query Text" constituents containing a ":" have been ignored.
- Generation of term frequencies took too long.

1.2.3 Version 1.7

New Features in v1.6 (B25):

- n/a

Bugfixes:

- Bug #714 - Tree nodes don't reflect selections from URL
- Bug #716 - Default url-template contains the deprecated magic word "\$termLabel"

1.2.4 Version 1.6

New Features in v1.6 (B20):

- TermSuggester Webpart is now compatible with the QueryFacets and TermTree Refiner Webpart (single select option only!).
- TermSuggester Webpart supports the {{\$termLabel}} option, only.

Bugfixes:

- Bug #335: [Selected facets are not highlighted](#)
- Bug #366: [TermTreeRefiner is empty for 1 character search terms like c* or *](#)
- Bug #504: [Facets are not kept if user submits same query again](#)
- Bug #560: [Keepfacets: list of selected facets is not updated in tree when entering a new search term](#)

Known Issues/Feature Requests:

- Bug #335: Keepfacets: the last selected refiner value cannot be de-selected
- Bug #563 - support templates like: owstaxIdProperty:"GP0 | {{\$termGUID}}"

New Features in v1.6 (B15):

- Added an option "Keep Facets" to the QueryFacet-webpart: if this option is switched on, then the currently selected facets are kept if the user enters a new search term. This is useful if you want to create a search center that already contains active refiner filters, that are visible to the end-user.

New Features in v1.6 (B13):

- SearchPageLayout-feature: this feature includes a page layout named "SearchPageLayout". This page layout is used in search-centers to arrange all

refinement web parts in tabs. Combined with the QueryFacets-webpart this greatly improves usability when employing the TermTreeRefiner-webpart(s) and the standard refiner webpart.

Bugfixes:

- Bug #367
- Bug #435
- selected refiners are now printed BOLD
- Bug #464 – TermTreeRefiner: always German labels are displayed (English labels are present!).

1.2.5 Version 1.5

New Features in v1.5 (B85):

- QueryFacets-Webpart: this web part is placed underneath the search box and displays the selected refiner values. This provides users with a convenient overview of all selected refiner values.

Bugfixes:

- Bug #446 - TermSuggester and MatchingTerms webpart show no values.
- Bug #367 - Selected facets remain unchanged (in "selektierte Ausdrücke") if clicked in the tree

1.2.6 Version 1.4

New Features in v1.4 (B57):

- StaticTermTree-Webpart: this web part adds the *navigation hierarchy* feature from lists and libraries to the search center. This allows for exploring content using tags and search queries in parallel.

Bugfixes:

- Bug #364 - jQuery-noconflict (B70)
- Bug #363 - Webpart "StaticTermTree" is not removed after de-installation or replaced after upgrade
- Bug #360 - StaticTree ignores terms for columns that are defined in sites other than the searchcenter
- Bug #361 - The statictree shows no terms if the sitecolumn cannot be identified for the given managed property
- Bug #354 - Static tree displays term labels in German only
- Bug #355 - Display name is ignored

1.2.7 Version 1.3

New Features in v1.3 (B43):

- RelatedTerms-Webpart: a checkbox in the configuration settings allows for showing only used (or unused) terms. ([bugid=243](#))
- RelatedTerms now also support parents/children/siblings of terms, if user chooses to show them (bugid=237)
- TermTreeRefiner now allows for multiple selection in ONE facet (configurable) (bugid=280)
- TermTreeRefiner provides graphical user interface to add or remove facets. (bugid=280)
- TermTreeRefiner: configuration settings allow for specifying the maximum number of search results that are reflected in the refiner
- In order to avoid inconsistent search results and TermTreeRefiner-result, the TermTreeRefiner configuration settings allow for specifying a "Query text" that takes the KQL-query from the search result webpart (ref. "Query Text" in <https://technet.microsoft.com/en-us/library/gg549987.aspx>).

Note:

All bug IDs refer to DIQA's Bugzilla-portal: <http://bugs.diqa-pm.com/index.php>

Bugfixes:

Different searchresults in resultwebpart and treeviewrefiner	345
Add an option "Query text"	351
Add a throbble to indicate that the tree is loading	352
TreeView returns 500 Internal Server Error if searchpage-URL contains no parameter	343
multi-select: single-select and multi-select facets cannot be mixed	341
Multi-select: selecting labels via hyperlink does not correspond to checkbox	339
Multi value: wrong actions for links	338
Treeview overlaps search results panel	336
treeview ignores new search term if magni-glass is clicked	334
treeview: de-selected facets remain highlighted	333
treeview: old search term replaces new term if a facet is selected	332
treeview: not consistent with search terms	331
Treeview disappears after modifying searchterm and hitting return	330
term suggester + treeview: internal error	329
Matching terms webpart: displays a search entry field	328

Cannot de-select facet-value after clicking on magnifying glass	326
The same facet-value can be selected multiple times (and cannot be unselected afterwards)	325
After selecting a facet, the language setting is lost	324
SP2013: tree-labels ragen in den suchbereich hinein	295

Open bugs (moved to v1.5):

<u>ID</u>	<u>Title</u>	<u>Status</u>
340	multi-select: treeview-facets don't change if another facet is selected	New
350	Treeview reflects only "local sharepoint results"-result source	New
346	Horiz. alignment changes when selecting a term	New
347	Wrong labels in the Selection-section	Reopened

1.2.8 Version 1.2

1. **Used Terms:** TermSuggester and MatchingTerms webparts can be configured to only show terms that are actually used to tag documents.
2. Some improvements in the configuration of the **TermTreeRefiner** web part.
3.  Semantic Search Webparts are now available for **SharePoint 2013**, too.

1.2.9 Version 1.1

1. **RelatedTerms Webpart:** Since version 1.4 GRASP supports non-hierarchical relations between terms. The RelatedTerms webpart can make use of this knowledge in the context of search. For a given term, it displays further terms that can guide the user to other search results that are indirectly related to the search term initially provided.

1.2.10 Version 1.0

1. **TermSuggester Webpart:** This webpart supports the user while she is typing the search query into the search box. Its intelligent matching algorithm suggests terms from the taxonomy that contain parts of the search query in their labels and synonyms.
2. **MatchingTerms Webpart:** This webpart lists all matching terms for a given search term. For each matching term a tooltip provides is additional information like the synonyms, the term set or the parent terms.
3. **TermTreeRefiner Webpart:** This webpart extends the standard refiner webpart and visualizes the terms in the context of the term-tree. Users can select terms in the treeview to drill down or drill up in the search results.
4. **Support for poly-hierarchies:** If GRASP is also installed the Semantic Search Webparts also properly handle terms that have multiple parents.

2 Administration Guide

2.1 Software prerequisites

 Semantic Search Webparts requires **SharePoint Server 2010** or **SharePoint Server 2013**.

In order to use some features of the Semantic Search webparts, such as poly-hierarchies or the RelatedTerms webpart you must install GRASP v1.4 or GRASP-TermManager v1.5 or later. Obtain GRASP from DIQA:

- <http://diqa-pm.com/en/GRASP>

Client PC Requirements:

1. Windows Vista/Windows 7
2. Microsoft Internet Explorer 8, 9 or later

Note:

Currently there are compatibility issues between SharePoint 2010 and Internet Explorer 11. When running Internet Explorer 11 and experiencing some problems please use Internet Explorer's compatibility mode for your SharePoint site!

2.2 Installation

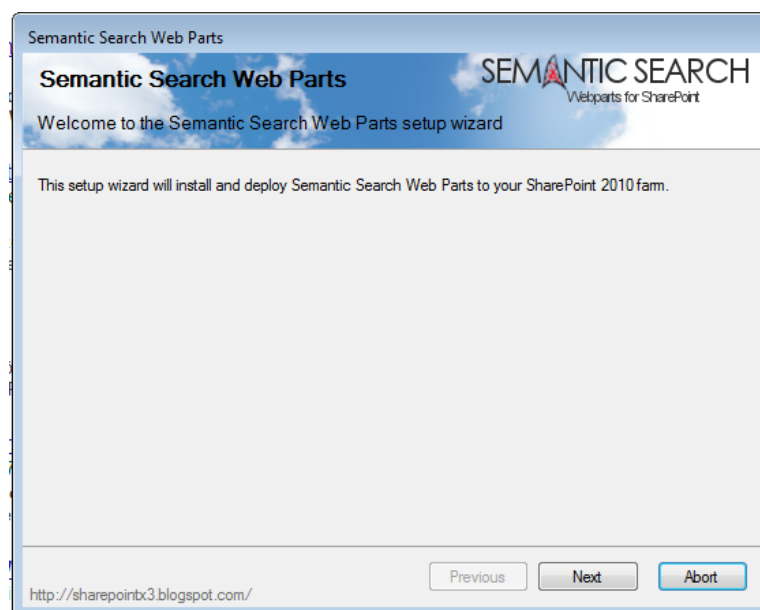
In order to provide your SharePoint users with the features of Semantic Search Webparts execute the installation wizard (SemanticSearchWebParts-XXX.exe) and configure a search pages making use of the new webparts. The following instructions guide you through this process.

1. Download the latest version of Semantic Search Webparts via http://diqa-pm.com/en/Semantic_Search_Webparts and store it as a local file on your server. Extract the zip file and choose the correct folder for your SharePoint version (2010 or 2013).

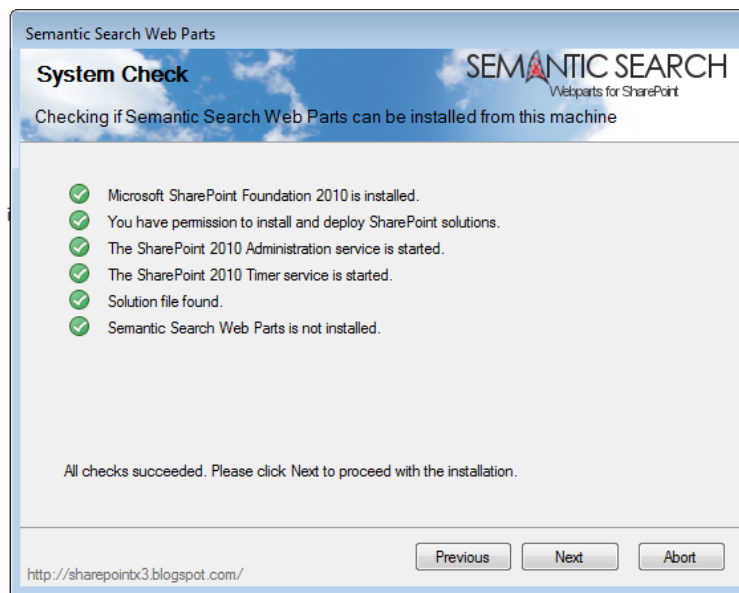
Note:

The evaluation version of Semantic Search Webparts is fully functional for 30 days. If you want to continue to use Semantic Search Webparts after this period has elapsed you must buy a valid license key from DIQA. Please contact: info@diqa-pm.de

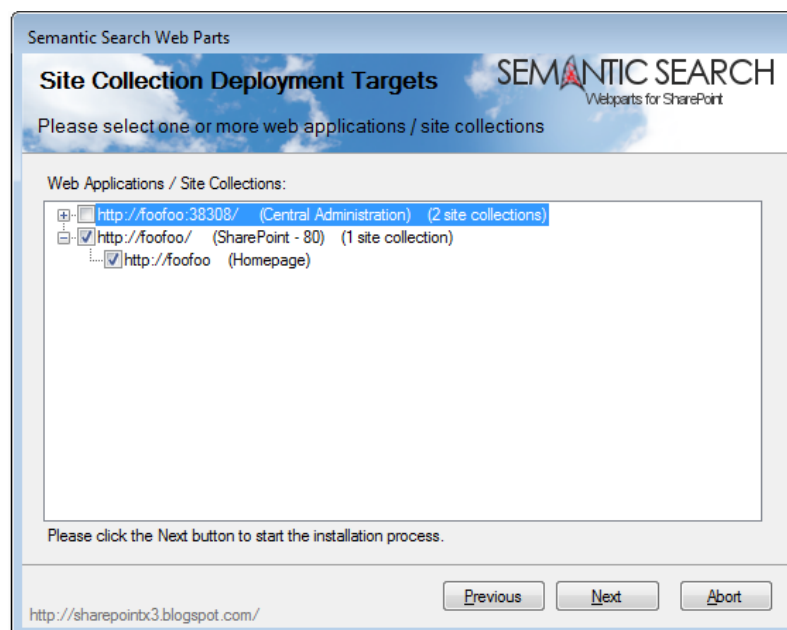
2. Click on the downloaded executable installer in the chosen folder (e.g. "SemanticSearchWebParts-XXX.exe ") to launch the Installation Wizard with administrator privileges. This will open in a dialog window:



3. Click on next to perform the system check that should indicate that the Semantic Search Webparts can be installed:



4. Click on next to see the End-User License Agreement (EULA). If you agree with the license agreement then tick the check box named "I accept the terms in the License Agreement" and click on next.
5. You will see a list of all site-collections of your SharePoint farm. Select the ones in which you want to provide the Semantic Search Webparts:



6. Click on next to initiate the deployment process.

Troubleshooting note:

If the installation process does not terminate (message: Waiting for solution deployment job to complete) then after a certain time, the installer displays a "timeout"-message. This might happen because of the size of your SharePoint deployment.

If this is the case then go to the Central Administration > Solution Management (e.g. <http://2013-sp:2013/admin/Solutions.aspx>) and select the solution "Semanticsearch.wsp". In the solution properties click on the hyperlink "Cancel Deployment Job".

We advise that you verify the presence of the solution and the feature in your SharePoint farm using the PowerShell.

7. Click on next to get the list of all SharePoint sites in which the webparts have been deployed.
8. Click on the "close"-button to close the Installation Wizard.
9. Go to the site settings of one of the selected site collections as site collection administrator and go to "*Site Collection Administration > Site collection features*". After the installation you see two features that are de-activated by default:
 - a. "SearchPageLayout" feature
 - b. "Semantic Search Webparts" feature.

	Search Server Web Parts and Templates This feature will add the Search Server Web Parts and Display Templates to your site. Search will work on most sites without this feature being activated, but if you get a message about missing templates when searching, then activate this feature.	Activate
	SearchPageLayout This feature includes a page layout named "SearchPageLayout". The page layout is used in search-centers to arrange all refinement web parts in tabs.	Deactivate Active
	Semantic Search Web Parts This feature provides a number of web parts for improving the search experience based on managed metadata and the content of the term store.	Deactivate Active
	SharePoint 2007 Workflows Aggregated set of out-of-box workflow features provided by SharePoint 2007.	Activate

2.3 De-Installation

In order to remove "Semantic Search Webparts" from your SharePoint Farm start the Installation Wizard with administrator privileges. While checking the system status, the installer will detect that the "Semantic Search Webparts" are already installed and will

offer two options: "Repair" and "Remove". After selecting "Remove" they will be removed from all relevant site collections.

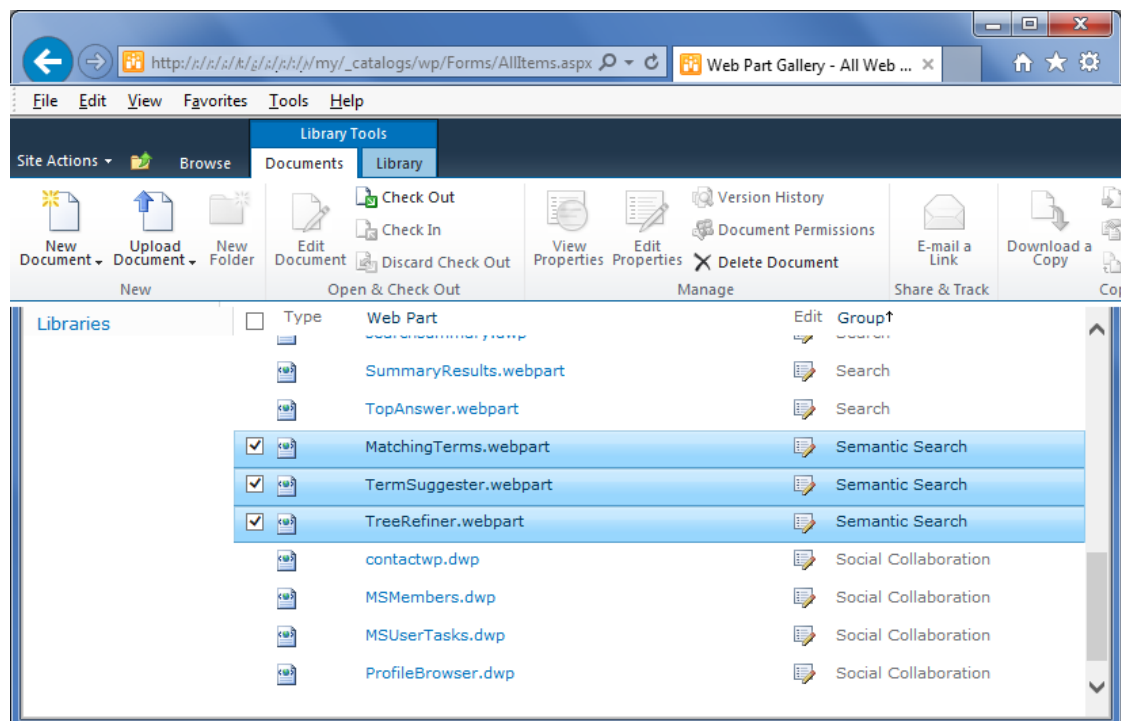
Troubleshooting note:

If the de-installation process does not terminate (message: Waiting for solution retraction job to complete) then go to the Central Administration > Solution Management (e.g. <http://2013-sp:2013/admin/Solutions.aspx>) and select the solution "Semanticsearch.wsp". In the solution properties click on the hyperlink "Cancel Retraction Job". The de-installation process will immediately resume.

Open the PowerShell:

1. Enter: Remove-SPSolution -Identity semanticsearch.wsp -force
2. Enter: Get-SPSolution to verify that semanticsearch.wsp is not contained.

Sometimes the web parts are not properly removed from the system. To mitigate that please visit the site settings of those site collections in which the "Semantic Search Webparts" have been used. Under the "Galleries > Web parts" you might still find the webparts. They are listed in the "Semantic Search" group. For easier location please sort the list by "Group". Now select the check box of the web parts and click "Delete Document" in the ribbon.



3 User Guide

The “Semantic Search Webparts”-solution comprises two site features that can be activated independently; the site features come with the following items:

- “Semantic Search Webparts”-feature
 - StaticTermTree-Webpart
 - TermSuggester Webpart
 - MatchingTerms Webpart
 - RelatedTerm Webpart
 - TermTreeRefiner Webpart
 - QueryFacets-Webpart
- “SearchPageLayout”-feature
 - “SearchPageLayout”-page layout

Each of these items can be added to a basic or enterprise search center in order to improve the functionality of the search experience.

3.1 TermTreeRefiner Webpart

The TermTreeRefiner webpart provides a view on the terms used by the documents contained in the search results. This view shows the hierarchical organization of the terms. Since it is a refiner webpart it can be used to drill-down and to focus on the most relevant search results.

3.1.1 Configuration for SharePoint 2016

Step 1: Pre-requisites

Prepare the following:

1. The configuration guidelines assume that you already have a search center in place. If this is not the case, then you have to create either a basic or enterprise search center.

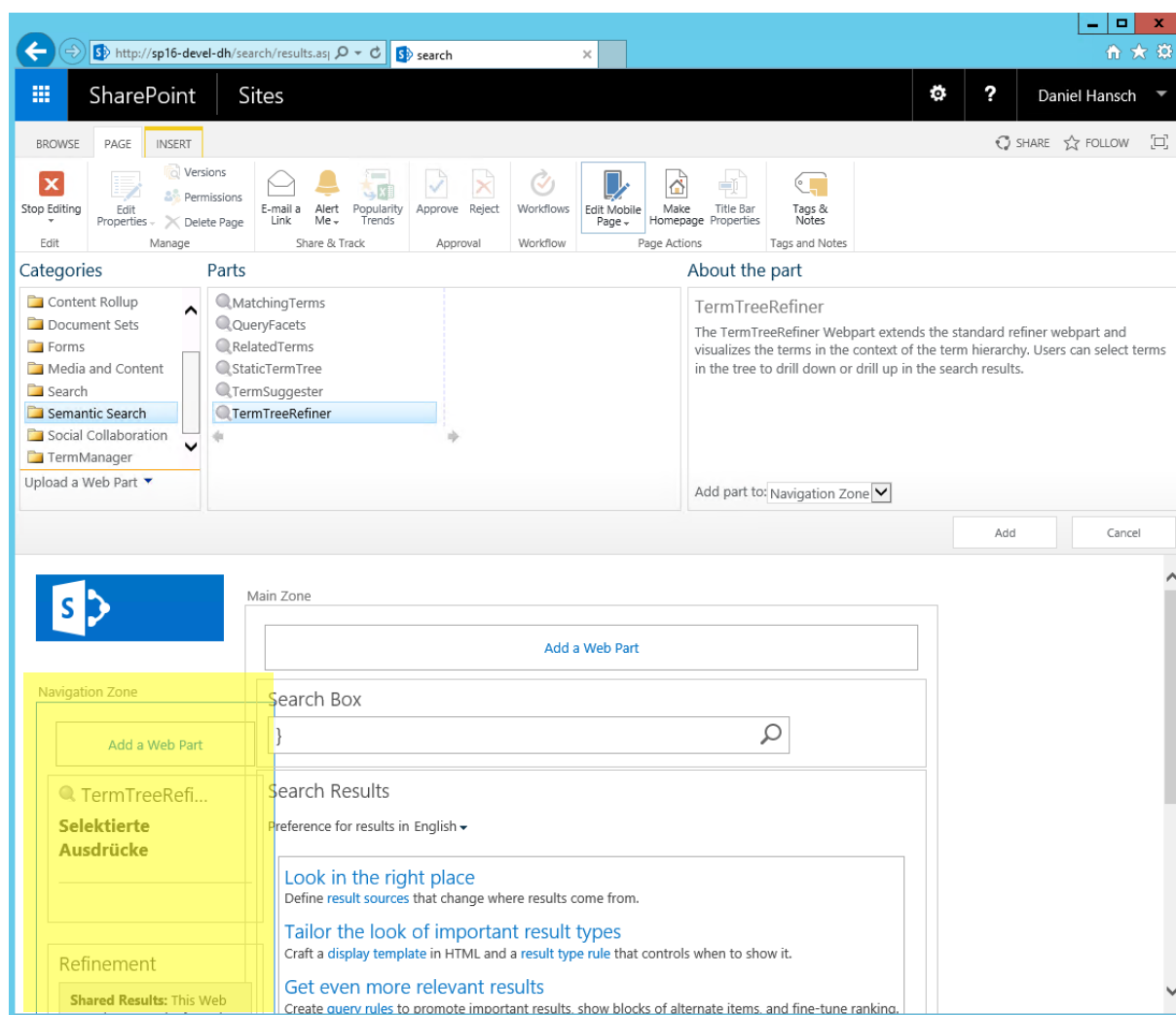
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

Open the site settings of your search center, access the “Site Collection Features” and activate the feature “Semantic Search Web Parts”. This feature is introduced by the “Semantic Search Webparts”-solution and adds this web part (amongst others):

- TermTreeRefiner Webpart

Step 3: Add the TermTreeRefiner to the search results page

We recommend to add the TermTreeRefiner on top of the original “Refiner” web part.



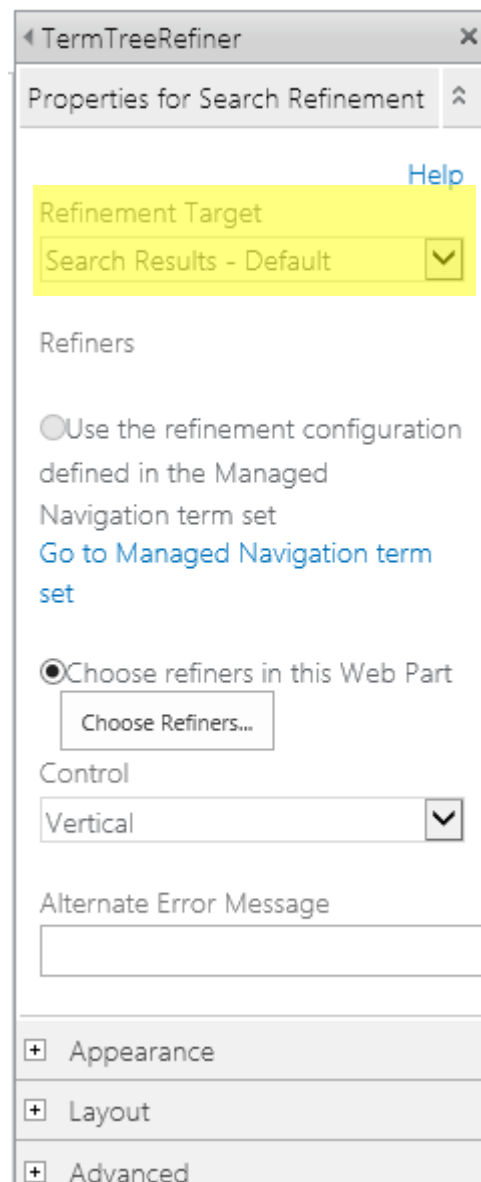
Note: In order to have sufficient input for populating the refiner, the page must also contain the search core results webpart.

Step 4: Open the configuration settings of the TermTreeRefiner web part

Using the webpart's context-menu users can open the configuration panel that displays a long list of configuration options. With the exception of the REFINEMENT-and "TreeRefiner Webpart settings"-Options, all present options are identical to the ones available in the standard SharePoint RefinementPanel webpart (cf. <http://technet.microsoft.com/en-us/library/gg549985%28v=office.14%29.aspx> for its documentation).

Step 5: Select the refinement target

Select here the web parts that contains the search results.



Step 6: Select the refiners

Refiners are the facets (or “sections”) that are displayed in the TermTreeRefiner. Each refiner corresponds to a managed property in your search schema, that contains terms (i.e. that represents a column of the type “managed metadata”). Click on “Choose refiners” to open a popup where you can pick the refiners from the list of managed properties (that are refinable).

We recommend that you select a predefined refinable managed property, like “RefineableString00” and create a schema mapping from your crawled property onto it.

 Note:

We don't recommend to use the managed property **"owstaxidmetadatalltagsinfo"** in the TermTreeRefiner, because it will not return valid results if users select values in the tree.

Per refiner specify the appropriate display template:

- Refinement item: for single value selections or
- Multi Value Refinement Item: for multi-value selections

Per refiner specify the label of the refiner that is displayed instead of the name of the managed property ("Aliases").

Refinement configuration for 'TermTreeRefiner' ✕

The refiners will be displayed in the order listed.

Available refiners

AttachmentType
BaseOfficeLocation
ClassificationLastScan
ClassificationType
CombinedUserProfileNames
companies
contentclass
ContentType
ContentTypeId
Created

Add >
< Remove
Move up
Move down

Selected refiners

RefinableString00

Configuration for: RefinableString00

Sample values

Sorry, something went wrong.

SHOW DETAILS

Type

Text

Aliases

Display name

Display template

Einschränkungselement

Sort by

Count

Sort direction

Descending

Maximum number of refiner values:

15

Preview refiners...

OK

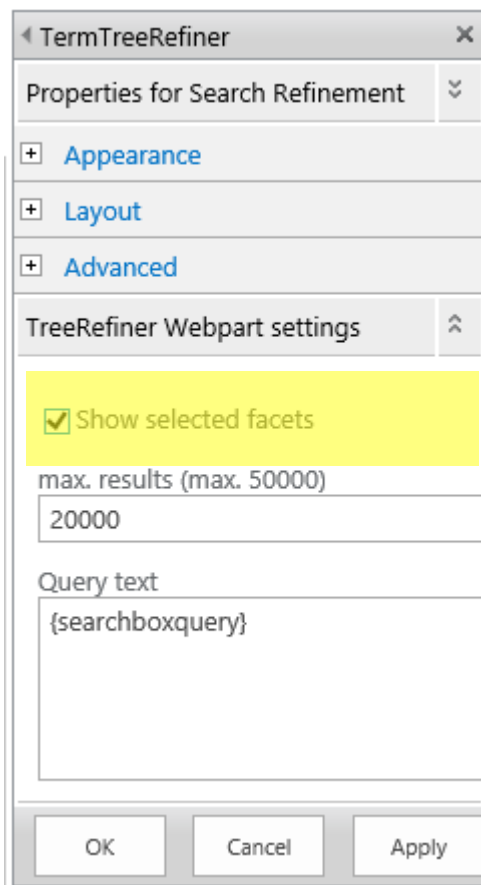
Cancel

Close the Refinement Configuration by clicking on OK.

Step 7: Hide or show the selected facets

If you add the QueryFacet webpart to your search page then you would hide selected facets in the termtree refiner because they are listed in the QueryFacet webpart. In this case you would untick the selection box.

If you don't use the QueryFacet webpart then you should tick the selection box (default).



The screenshot shows the 'TermTreeRefiner' dialog box. It has a title bar with a back arrow, the text 'TermTreeRefiner', and a close button. Below the title bar is a section 'Properties for Search Refinement' with a dropdown arrow. Under this section are three expandable categories: 'Appearance', 'Layout', and 'Advanced', each with a plus icon. Below these is a section 'TreeRefiner Webpart settings' with an expand/collapse arrow. This section contains a yellow-highlighted checkbox labeled 'Show selected facets' which is checked. Below the checkbox is a text field labeled 'max. results (max. 50000)' containing the value '20000'. Below that is a text area labeled 'Query text' containing the placeholder '{searchboxquery}'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

Step 8: Specify the maximum number of search results that are reflected in the refiner

For efficiency reasons the treeview refiner examines only a limited number of search results for the presence of terms. Enter in the field "max. Anzahl Ergebnisse"/"max. results" the maximum number of search results that should be examined. Please note: if you select a number that is too low then not all search results might be displayed in the treeview. The bigger the number, the longer is the loading time of the treeview.

TermTreeRefiner

Properties for Search Refinement

- + Appearance
- + Layout
- + Advanced

TreeRefiner Webpart settings

☒ Show selected facets

max. results (max. 50000)

20000

Query text

{searchboxquery}

OK Cancel Apply

Step 9: Enter the “Query Text”/ “AbfrageText”

Copy the Query Text-string from the search results webpart and paste it into the “QueryText”/ “AbfrageText” field of the TreeViewRefiner webpart setting. The string must be identical in both webparts in order to avoid inconsistent search hits in the TreeViewRefiner and search results webpart.

The “Query Text”/ “AbfrageText” must contain atleast {searchboxquery}.

i Troubleshooting note:

3. The "Query Text"/ "Abfragetext" ignores Query Variables (except {searchboxquery})! If your search result webpart uses query variables then replace them with concrete values. Otherwise the search results will differ amongst both webparts.
4. The TreeViewRefiner uses the result source "Local SharePoint Results (System)", only. If your search result webpart uses a different result source you will obtain different result sets.

Step 10: Save the configuration settings and save the search-page.

Save the page.

Step 11: IMPORTANT: Create a schema mapping to your refinable managed property

Open the search schema and click on the hyperlink “Managed Properties” to retrieve the list of managed properties.

Enter the name of the refinable managed property that you have selected as refiner in step 6 (e.g. “RefinableString00”) into the filter and apply the filter to retrieve it in the list of refinable managed properties for strings.

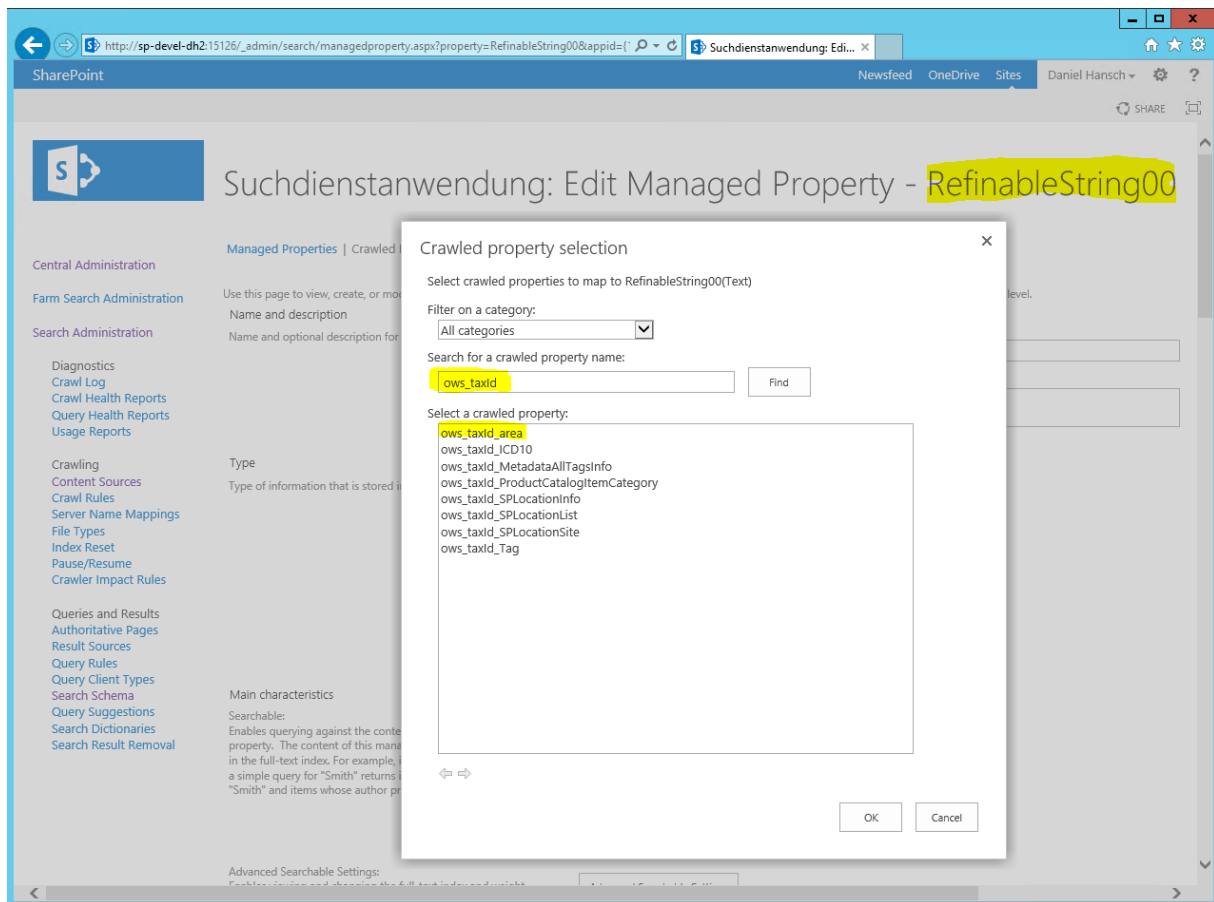
The screenshot shows the SharePoint 'Suchdiensteanwendung: Managed Properties' page. The left navigation pane has 'Search Administration' expanded, with 'Search Schema' highlighted. The main content area shows a list of managed properties. A red box highlights the 'Filter' section where 'RefinableString' is entered. The table below shows the list of managed properties.

Property Name	Type	Multi	Query	Search	Retrieve	Refine	Sort	Safe	Mapped Crawled Properties
RefinableString00	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString01	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString02	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString03	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString04	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString05	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString06	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString07	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString08	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString09	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString10	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString11	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	

Identify your RefinableString-property and click on it to open it in edit mode.

The edit mode of the RefinableString-property contains the section “Mappings to crawled properties”. Click on the button named “Add a mapping” to open a popup window.

In the popup window, enter the string “ows_taxid” and click on “Find” to retrieve the list of crawled properties of type “Managed Metadata”.



Select in the list of crawled properties the property that corresponds to your site column. Click on “OK” to save the setting and close the popup window.



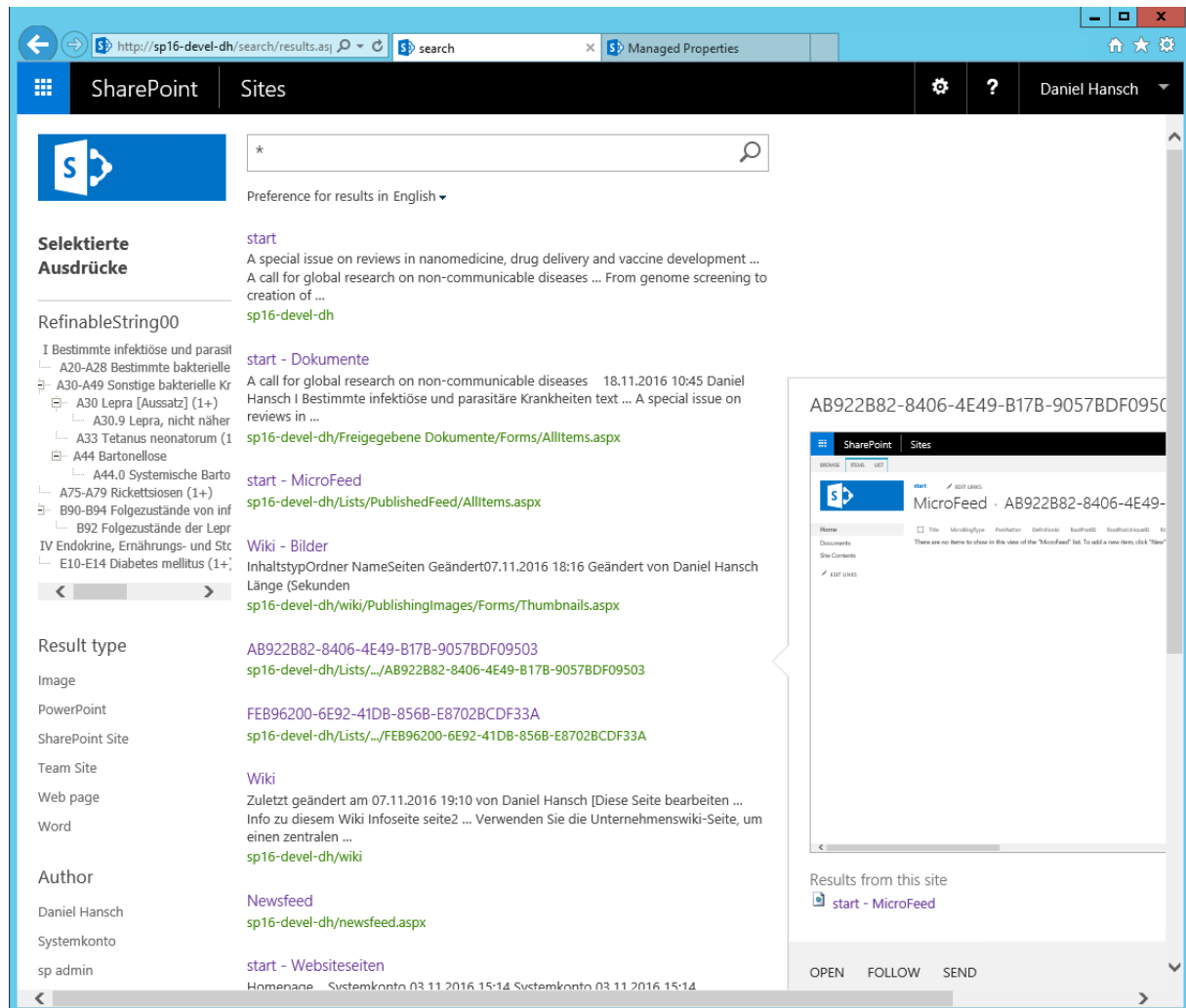
If you cannot find a crawled property that corresponds to your site column, then your full crawl has not terminated yet.

Click on “OK” to save the setting of the managed property and to leave the edit mode.

Step 12: Verify the treeview

Open again the search page and enter an appropriate search term, e.g. “*”. The treeview will display the managed metadata terms of the selected managed properties that occur in the search results grouped by the managed properties.

If the treeview remains empty, then no managed metadata terms are present in the current search results, or you have selected the maximum number of search results too low.



3.1.2 Configuration for SharePoint 2013

Step 1: Pre-requisites

Prepare the following:

2. The configuration guidelines assume that you already have a search center in place. If this is not the case, then you have to create either a basic or enterprise search center.

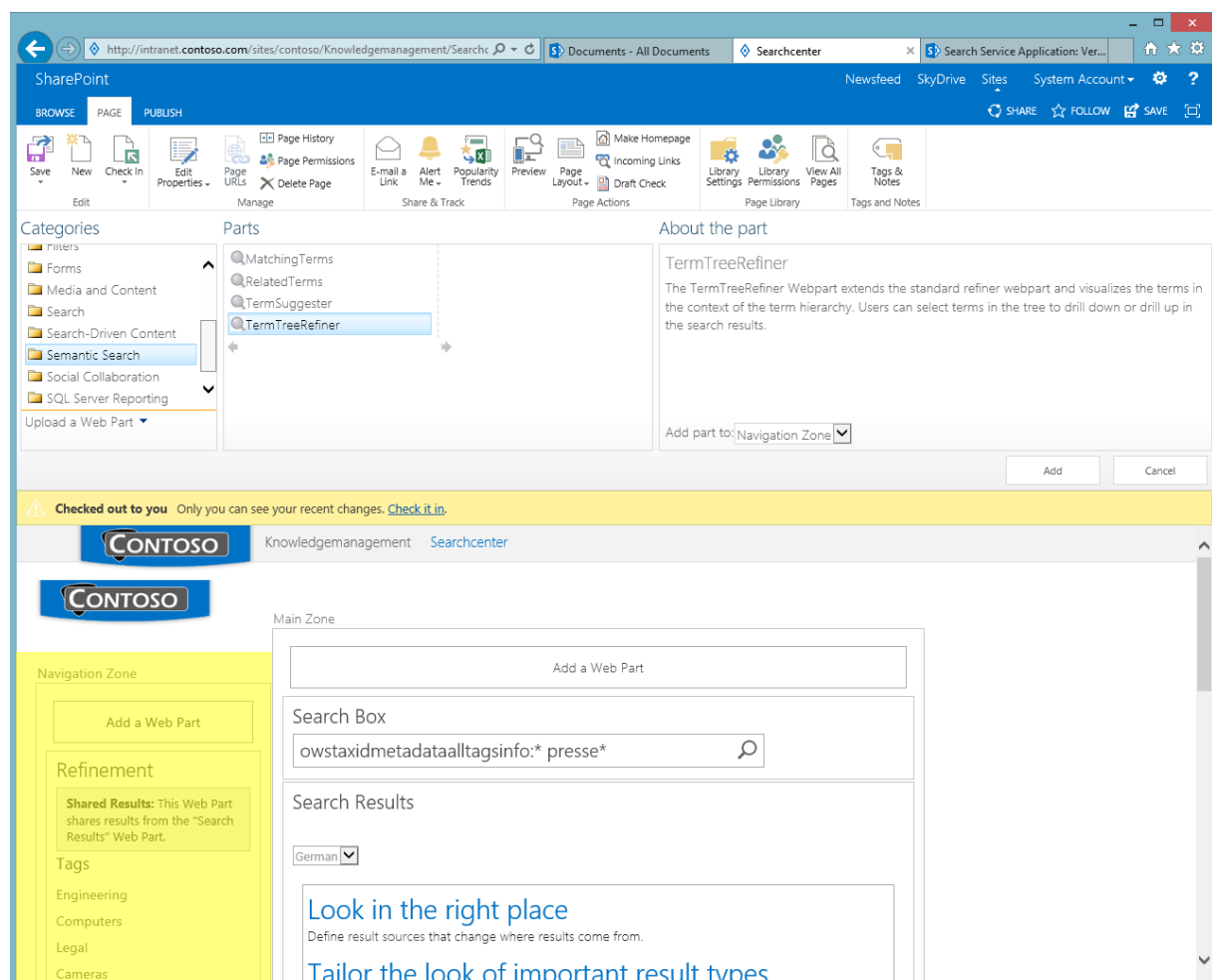
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

Open the site settings of your search center, access the "Site Collection Features" and activate the feature "Semantic Search Web Parts". This feature is introduced by the "Semantic Search Webparts"-solution and adds this web part (amongst others):

- TermTreeRefiner Webpart

Step 3: Add the TermTreeRefiner to the search results page

For SharePoint 2013 we recommend to add the TermTreeRefiner on top of the original "Refiner" web part.



Note: In order to have sufficient input for populating the refiner, the page must also contain the search core results webpart.

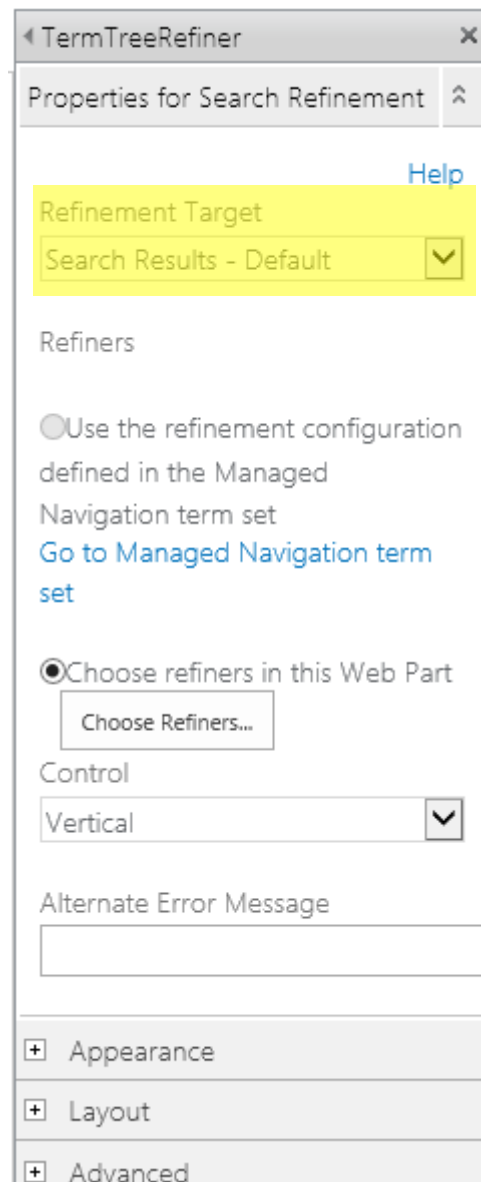
Step 4: Open the configuration settings of the TermTreeRefiner web part

Using the webpart's context-menu users can open the configuration panel that displays a long list of configuration options. With the exception of the REFINEMENT-and

"TreeRefiner Webpart settings"-Options, all present options are identical to the ones available in the standard SharePoint RefinementPanel webpart (cf. <http://technet.microsoft.com/en-us/library/gg549985%28v=office.14%29.aspx> for its documentation).

Step 5: Select the refinement target

Select here the web parts that contains the search results.



TermTreeRefiner

Properties for Search Refinement

Help

Refinement Target

Search Results - Default

Refiners

☐ Use the refinement configuration defined in the Managed Navigation term set
[Go to Managed Navigation term set](#)

☒ Choose refiners in this Web Part
[Choose Refiners...](#)

Control

Vertical

Alternate Error Message

+ Appearance

+ Layout

+ Advanced

Step 6: Select the refiners

Refiners are the facets (or "sections") that are displayed in the TermTreeRefiner. Each refiner corresponds to a managed property in your search schema, that contains

terms (i.e. that represents a column of the type "managed metadata"). Click on "Choose refiners" to open a popup where you can pick the refiners from the list of managed properties (that are refinable).

Make sure to select only managed properties, which contain terms, i.e. managed properties that represent a column of the type "managed metadata". Appropriate managed properties typically contain the prefix "owstaxid". Any other managed property will be ignored!

 Note:

We don't recommend to use the managed property **"owstaxidmetadatataginfo"** in the TermTreeRefiner, because it will not return valid results if users select values in the tree.

, e.g. "owsmetadatafacetinfo"

Per refiner specify the appropriate display template:

- Refinement item: for single value selections or
- Multi Value Refinement Item: for multi-value selections

Per refiner specify the label of the refiner that is displayed instead of the name of the managed property ("Aliases").

Refinement configuration for 'TermTreeRefiner' ✕

The refiners will be displayed in the order listed.

Available refiners

- LastModifiedTime
- Location
- ManagedProperties
- MediaDuration
- owstaxiddocumentwithtagdepartme
- owstaxiddocumentwithtagelectronic
- owstaxidmetadataalltagsinfo
- owstaxidProductCatalogItemCatego
- People
- PeopleInMedia

Add >

< Remove

Move up

Move down

Selected refiners

- owsmetadatafacetinfo

Configuration for: owsmetadatafacetinfo (Tags)

Sample values *No values found*
We don't have any refiners to show you

Type Text

Aliases

Display name

Display template Refinement Item ▼

Sort by Count ▼

Sort direction Descending ▼

Maximum number of refiner values:

Preview refiners...

OK

Cancel

Close the Refinement Configuration by clicking on OK.

Step 7: Hide or show the selected facets

If you add the QueryFacet webpart to your search page then you would hide selected facets in the termtree refiner because they are listed in the QueryFacet webpart. In this case you would untick the selection box.

If you don't use the QueryFacet webpart then you should tick the selection box (default).

TermTreeRefiner

Properties for Search Refinement

+ Appearance

+ Layout

+ Advanced

TreeRefiner Webpart settings

☒ Show selected facets

max. results (max. 50000)

20000

Query text

{searchboxquery}

OK Cancel Apply

Step 8: Specify the maximum number of search results that are reflected in the refiner

For efficiency reasons the treeview refiner examines only a limited number of search results for the presence of terms. Enter in the field "max. Anzahl Ergebnisse"/"max. results" the maximum number of search results that should be examined. Please note: if you select a number that is too low then not all search results might be displayed in the treeview. The bigger the number, the longer is the loading time of the treeview.

TermTreeRefiner

Properties for Search Refinement

+ Appearance

+ Layout

+ Advanced

TreeRefiner Webpart settings

☒ Show selected facets

max. results (max. 50000)

20000

Query text

{searchboxquery}

OK Cancel Apply

Step 9: Enter the “Query Text”/ “AbfrageText”

Copy the Query Text-string from the search results webpart and paste it into the “QueryText”/ “AbfrageText” field of the TreeViewRefiner webpart setting. The string must be identical in both webparts in order to avoid inconsistent search hits in the TreeViewRefiner and search results webpart.

The “Query Text”/ “AbfrageText” must contain atleast {searchboxquery}.

i Troubleshooting note:

1. The "Query Text"/ "Abfragetext" ignores Query Variables (except {searchboxquery})! If your search result webpart uses query variables then replace them with concrete values. Otherwise the search results will differ amongst both webparts.
2. The TreeViewRefiner uses the result source "Local SharePoint Results (System)", only. If your search result webpart uses a different result source you will obtain different result sets.

Step 10: Save the configuration settings and save the search-page.

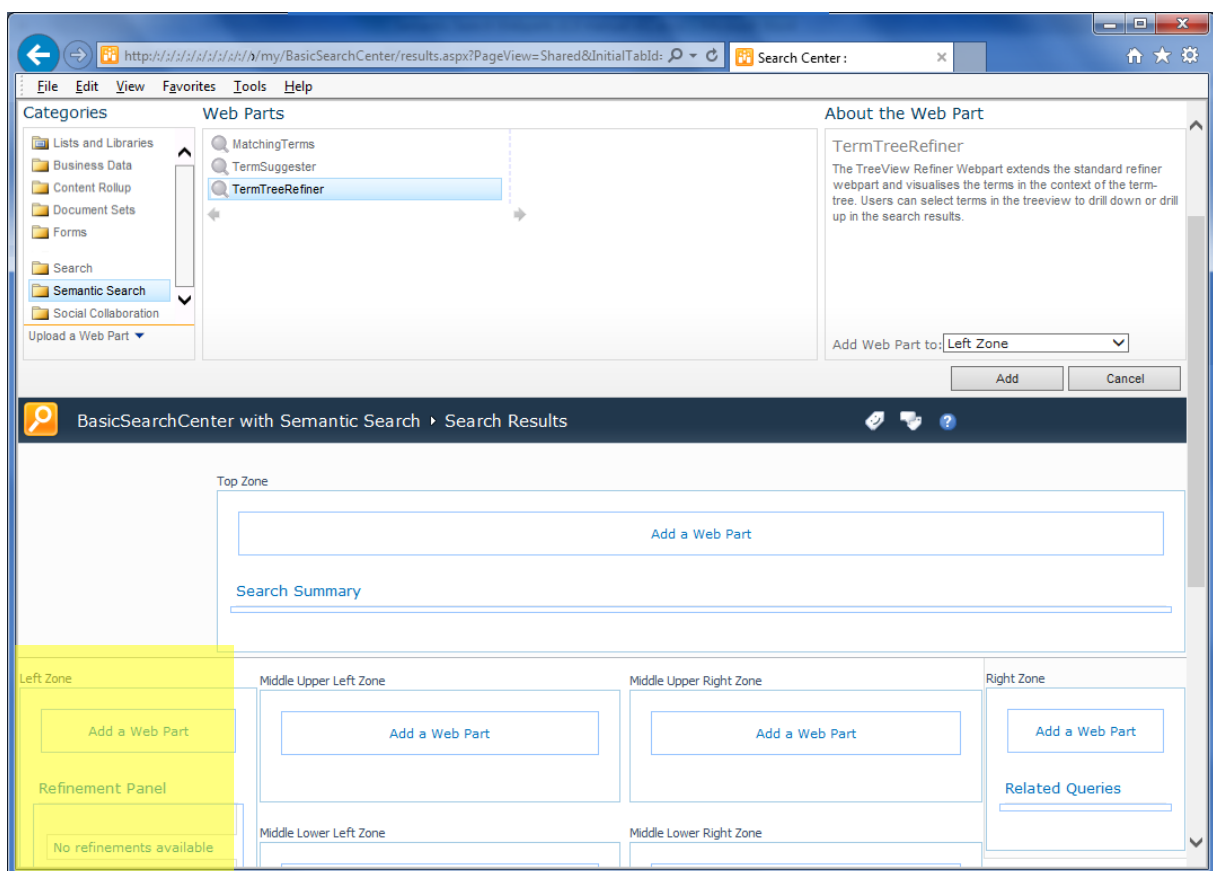
After saving the page and entering an appropriate search term, the treeview will display the managed metadata terms of the selected managed properties that occur in the search results grouped by the managed properties.

If the treeview remains empty, then no managed metadata terms are present in the current search results, or you have selected the maximum number of search results too low.

3.1.3 Configuration for SharePoint 2010

We recommend adding the TermTreeRefiner webpart at the left of the search result page, into the “Left zone”.

 For SharePoint 2010 we recommend to replace the original “RefinementPanel”. For SharePoint 2013 we recommend to add the TermTreeRefiner on top of the original “Refiner” web part.



Note: In order to have sufficient input for populating the refiner, the page must also contain the search core results webpart.

Using the webpart's context-menu users can open the configuration panel that displays a long list of configuration options. All present options are identical to the ones available in the standard SharePoint RefinementPanel webpart (cf. <http://technet.microsoft.com/en-us/library/gg549985%28v=office.14%29.aspx> for its documentation).

TermTreeRefiner [X]

- + Results Query Options
- + Refinement
- + AJAX Options
- + Miscellaneous
- Data View Properties [v]
- + Appearance
- + Layout
- + Advanced

OK Cancel Apply

TermTreeRefiner [X]

+ Results Query Options

- Refinement

Refinement Panel Caption
[Text Box]

Filter Category Definition
[Text Box: <?xml version="1.0" encoding]

Accuracy Index
[Text Box: 50]

Number of Categories to Display
[Text Box: 6]

Number of Characters to Display
[Text Box: 19]

☒ Use Default Configuration

+ AJAX Options

+ Miscellaneous

Data View Properties [v]

+ Appearance

+ Layout

+ Advanced

OK Cancel Apply

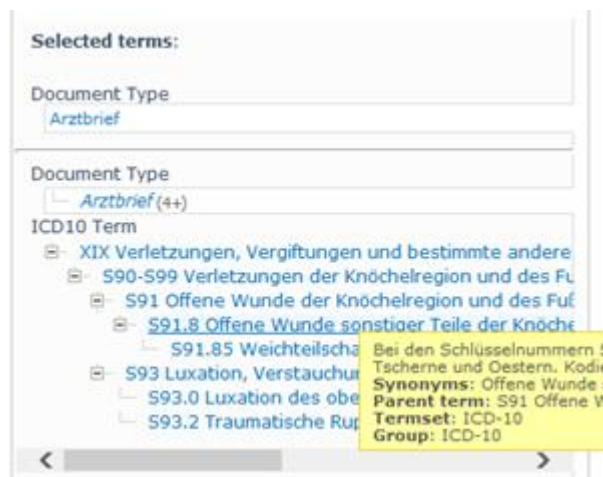
All settings in the section titled "Refinement" are ignored. You are advised to tick the check box "Use Default Configuration" to reset the filter definitions to their defaults. If this box is checked, all Managed Metadata Columns will be hidden and only the tree will be displayed, together with some technical metadata, like document type or author.

3.1.4 Usage

The TermTreeRefiner is used in the same way as the standard RefinementPanel. Instead of listing a number of terms for managed metadata columns, the new web part displays the taxonomies, in which these terms occur and also indicates how often they occur in the current result set.



In the given screenshot we see two managed metadata properties “Document Type” and “ICD10 Term”. The ICD10 terms are organized hierarchically and thus a tree of terms is displayed. After clicking on one of the terms (in this case “Arztbrief”) the search is repeated with an additional restriction, i.e. drill down. All restrictions are listed at the top of the refinement web part under “selected terms”.



3.1.4.1 Multilingual Terms

Each SharePoint Term Store has a default language and, optionally, additional working languages. Thus, terms in such multilingual Term Stores have default labels in several languages.

Which language is used for the terms that are displayed in the TermTreeRefiner?

The display language for the terms in the TermTreeRefiner is determined by

1. The default language of the search center and
2. The language(s) of the specific term.

Examples:

search center's default language	Languages of the specific term	Display language of the term in the TermTreeRefiner
EN	EN	EN
EN	FR	FR
EN	EN, FR	EN

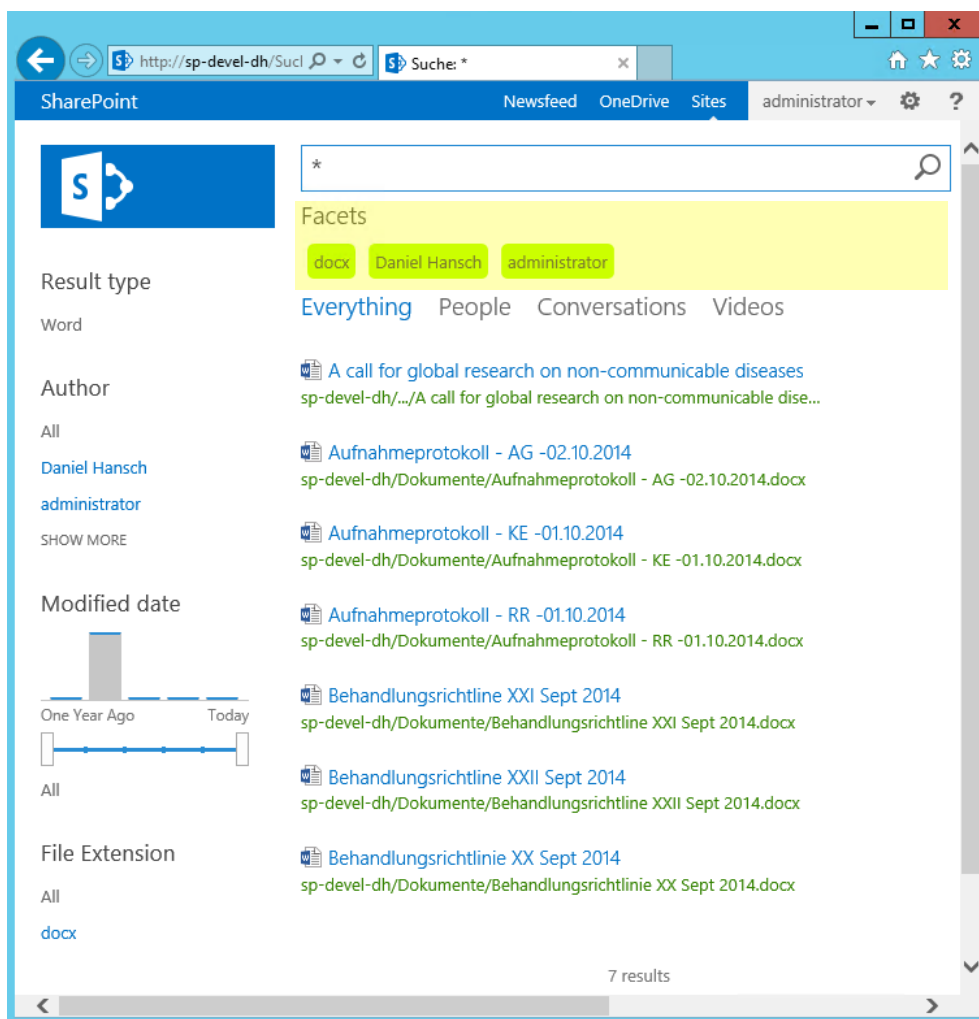
note:

The following settings are irrelevant for the display language of a term in the TermTreeRefiner:

- The “alternative language(s)” of the search center’s website.
- The user’s individual language settings in Windows or the Internet Explorer.

3.2 QueryFacets Webpart

The QueryFacets webpart provides a view on currently selected refiners, so called facets. The list of facets is perfectly synchronized with the refiner web parts, i.e. each user selection in the refiner web parts updates the list of facets. Thus the user can verify his refiner selections at one glimpse.



 The QueryFacets webpart is available for SharePoint 2013 only.

3.2.1 Configuration for SharePoint 2016 and 2013

Step 1: Pre-requisites

Prepare the following:

1. The configuration guidelines assume that you already have a search center in place. If this is not the case then you have to create either a basic or enterprise search center.

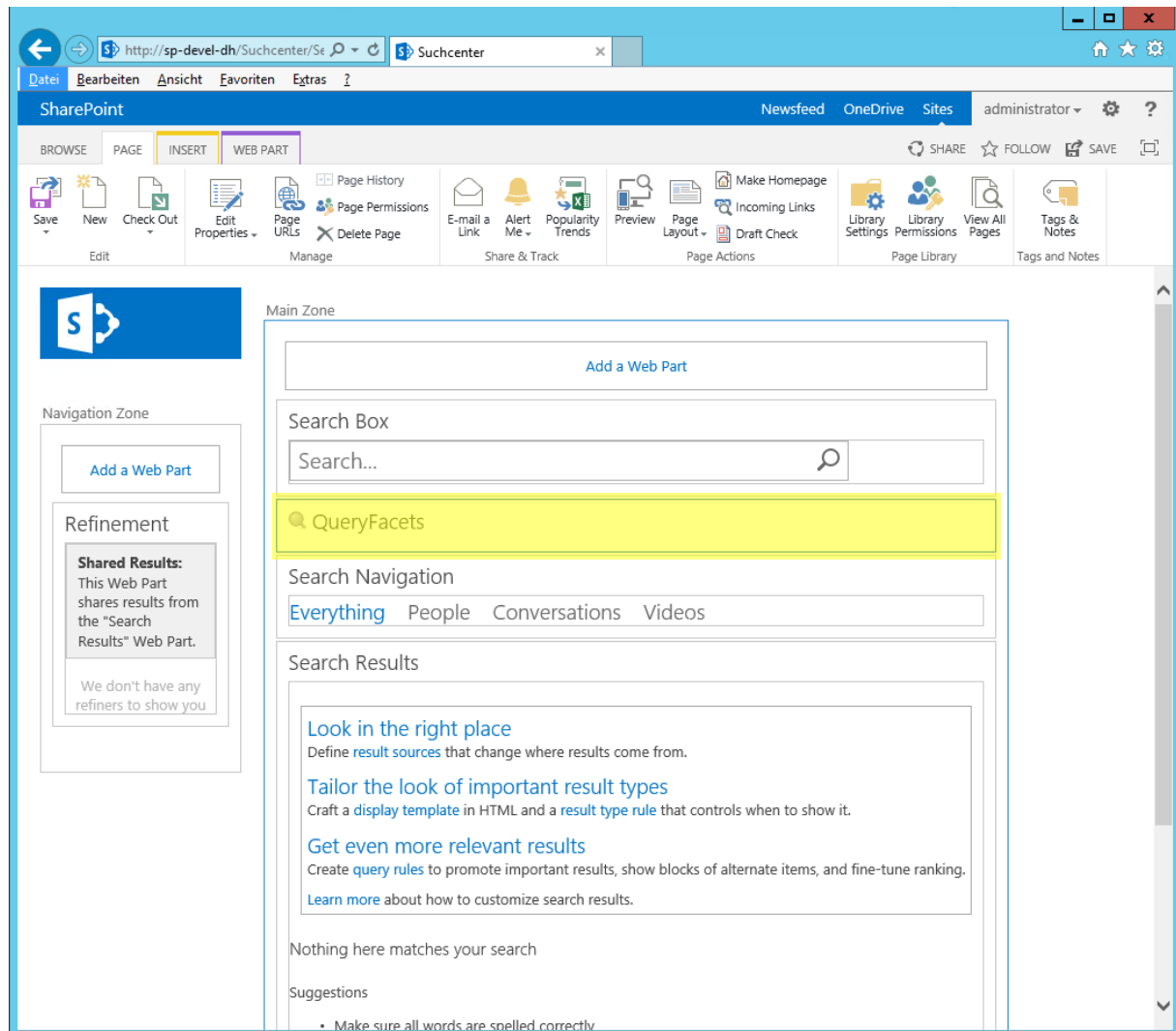
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

Open the site settings of your search center, access the “Site Collection Features” and activate the feature “Semantic Search Web Parts”. This feature is introduced by the “Semantic Search Webparts”-solution and adds this web part (amongst others):

- QueryFacets webpart

Step 3: Add the QueryFacets webpart to the search results page

For SharePoint 2013 we recommend to add the QueryFacets webpart between the search entry field and the list of search verticals.



Step 4: Open the configuration settings of the QueryFacets web part

Open the configuration settings of the QueryFacets web part using the webpart's context-menu.

Step 5: Edit the title label of the webpart

Enter the title label of the webpart.

active refiners

Appearance

Title

facets

Height

Should the Web Part have a fixed height?

☐ Yes Pixels

☒ No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

☐ Yes Pixels

☒ No. Adjust width to fit zone.

Chrome State

☐ Minimized

☒ Normal

Chrome Type

Default

Layout

Advanced

QueryFacets Webpart settings

☐ Keep facets for new search terms

OK Cancel Apply

Step 7: Tick on the option “Keep facets for new search terms”

The option “Keep facets for new search terms” can be ticked on or off (default is off). If you tick it on then all currently selected facets remain active even if the user enters a new search term. If you tick it off, then all facets are de-selected after entering a new search term (this is the standard behavior of SharePoint).

active refiners

Appearance

Title

facets

×

...

Height

Should the Web Part have a fixed height?

☐ Yes

Pixels

▼

☒ No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

☐ Yes

Pixels

▼

☒ No. Adjust width to fit zone.

Chrome State

☐ Minimized

☒ Normal

Chrome Type

Default

▼

Layout

Advanced

QueryFacets Webpart settings

⌆

☐ Keep facets for new search terms

OK

Cancel

Apply

Step 8: Save the configuration settings and save the search-page.

After saving the page and entering an appropriate search term, the refinement webpart will show values. Upon selecting of one or multiple values, the QueryFacet webpart will be populated with facets.

Semantic Search Webparts
User Manual

- 41 -

DIQA

 Note:

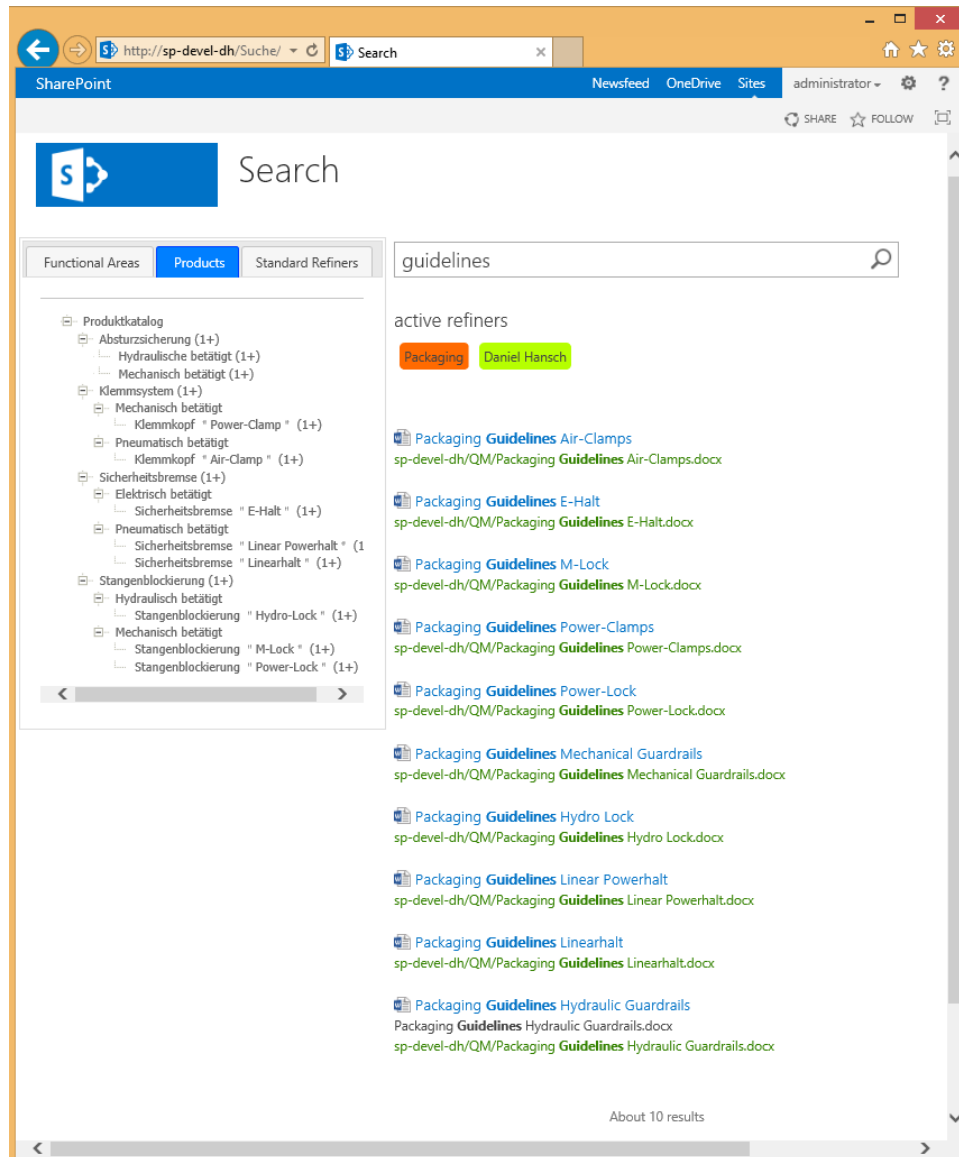
If you use the QueryFacets webpart and the TermTreeRefiner webpart simultaneously then it is advisable to hide the selected facets in the TermTreeRefiner webpart. Please refer to the section "TermSuggester webpart / Configuration".

3.2.2 Usage

The QueryFacets webpart is populated by selecting facets from the refiner panel. Facets can be removed by clicking on them in the QueryFacet webpart.

3.3 SearchPageLayout Pagelayout

The "SearchPageLayout" feature is a site feature, that includes a page layout named "SearchPageLayout". This page layout is used in search-centers to arrange all refinement web parts in tabs. Combined with the QueryFacets-webpart this greatly improves usability when employing multiple refiners in one search page.



 The QueryFacets webpart is available for SharePoint 2013 only.

3.3.1 Configuration for SharePoint 2016 and 2013

Step 1: Pre-requisites

Prepare the following:

Semantic Search Webparts
User Manual

1. The configuration guidelines assume that you already have a search center in place. If this is not the case then you have to create either a basic or enterprise search center.

Step 2: Activate the feature “SharePoint Server Publishing”.

Open the site settings of your search center, access the “Site Features” and activate the feature “SharePoint Server Publishing”. This feature adds the capability to use page layouts and these libraries to the search center: documents, pages, images, site-assets and workflow tasks.

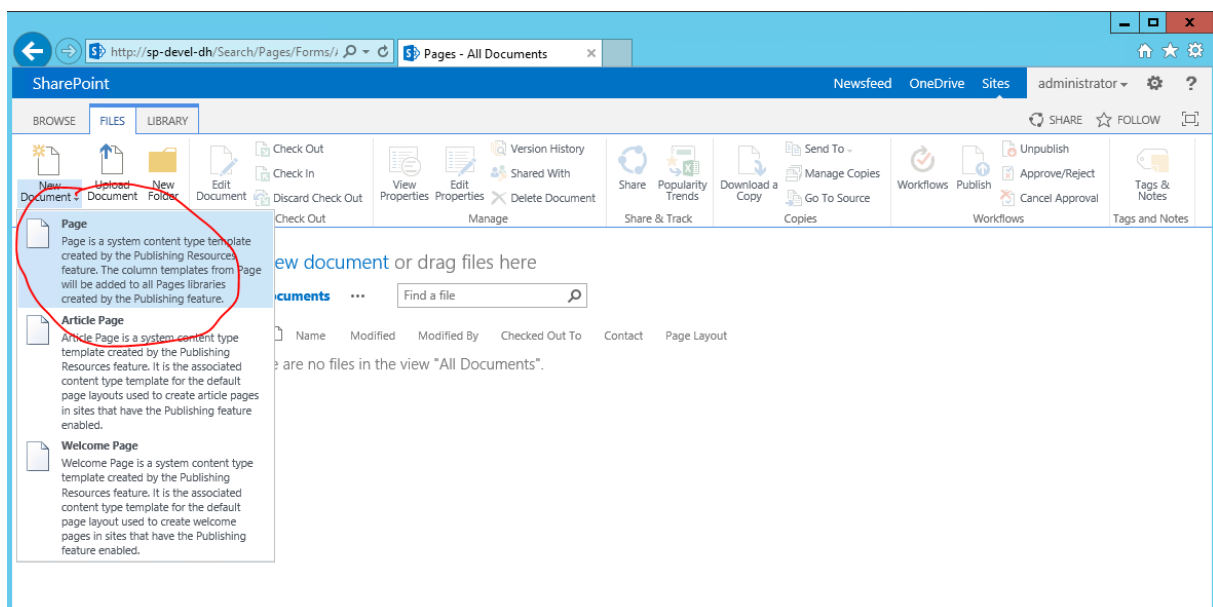
Step 3: Activate the feature “SearchPageLayout” in your site collection.

Open the site settings of your search center, access the “Site Collection Features” and activate the feature “SearchPageLayout”. This feature is introduced by the “Semantic Search Webparts”-solution. This feature adds a Page Layout named “searchpagelayout” to your web site (you can inspect the page layout by opening your web site’s “Design Manager” and clicking on the hyperlink “6. Edit Page Layouts”).

Step 4: Create a new page in the library “Pages” that uses the page layout “SearchPageLayout”.

Open the site contents of your search center, and open the library “Pages”.

Open the tab “Files”, expand the “New Document”-button and click on “Page”.



Create a new page by entering a title, e.g. "Searchresults", a description and a URL name, e.g. "Searchresults". Select the page layout named "SearchPageLayout" and click on "Create".

SharePoint

Newsfeed OneDrive Sites administrator

SHARE FOLLOW

Search this site

Create Page

Site Contents

Page Title and Description

Enter a URL name, title, and description for this page.

Title: Searchresults

Description:

URL Name: Pages/Searchresults.aspx

Page Layout

Select a page layout to control how the page will be displayed.

- (Redirect Page) Umleiten
- (Welcome Page) Begrüßungsbildschirm
- (Welcome Page) Erweiterte Suche
- (Welcome Page) Hyperlinkübersichten
- (Welcome Page) Leere Webpartseite
- (Welcome Page) Personen suchen
- (Welcome Page) SearchPageLayout**
- (Welcome Page) Suchergebnisse
- (Welcome Page) Suchfeld
- (Welcome Page) Websiteverzeichnis-Homepage

Check Spelling Create Cancel

The new page has been added to the Pages-library.

SharePoint

Newsfeed OneDrive Sites administrator

SHARE FOLLOW

Search this site

Pages

Site Contents

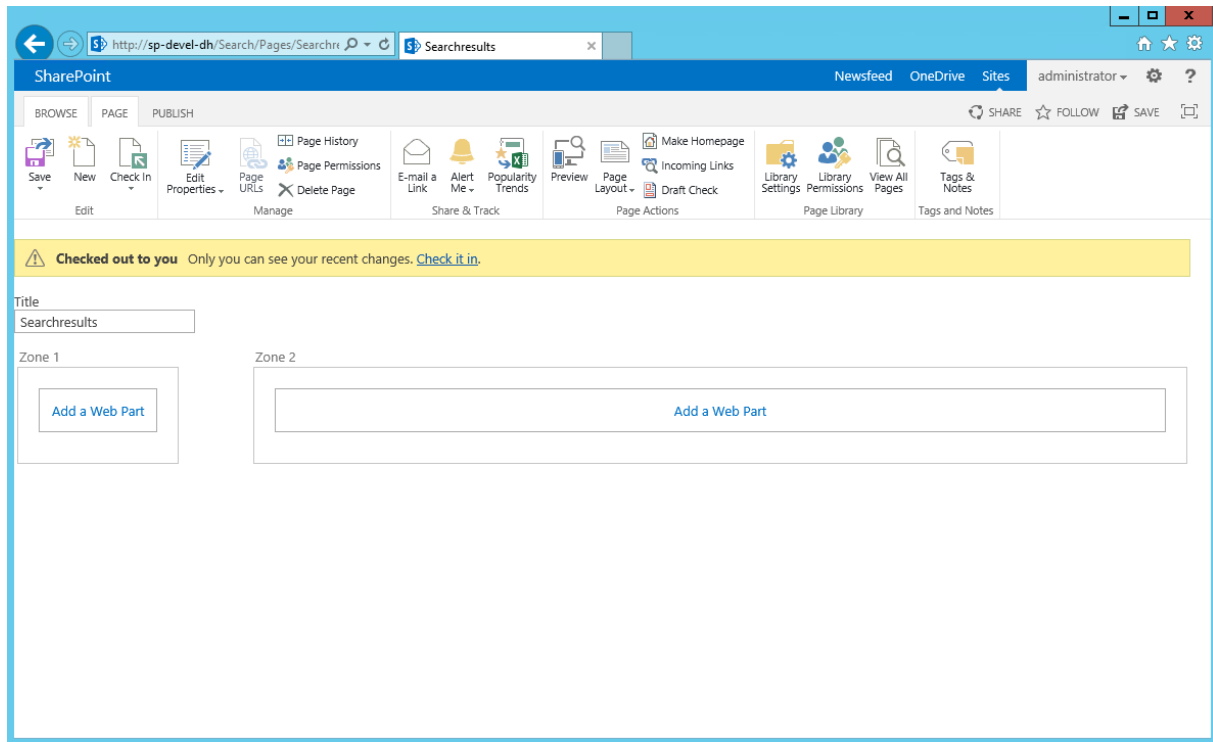
+ new document or drag files here

All Documents ... Find a file

✓	Name	Modified	Modified By	Checked Out To	Contact	Page Layout
	Searchresults.aspx	A few seconds ago	administrator	administrator	administrator	SearchPageLayout

Step 5: Edit the Searchresults-page to modify the title.

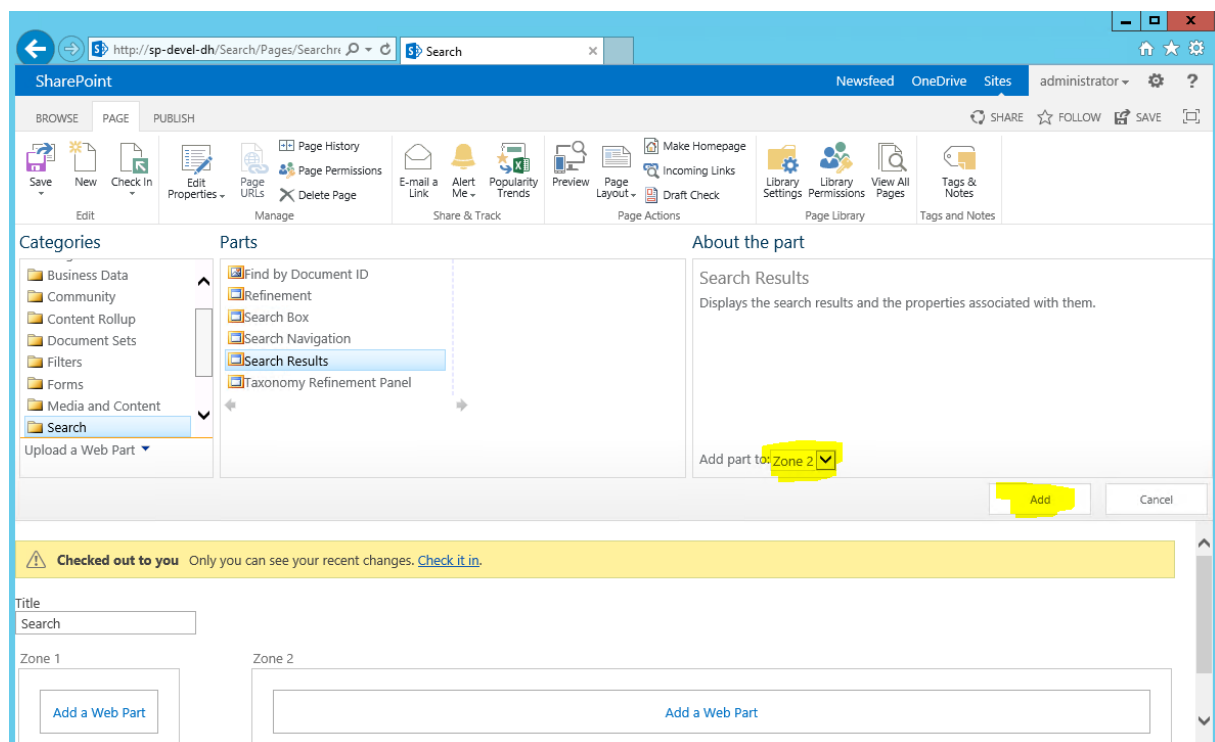
Open the Searchresults-page and click on “Edit page”.



Enter the new title into the “Title”-field, e.g. “Search”

Step 6: Add the “Search Results”, “Search Box” and “QueryFacets” web parts to the webpart-zone “Zone 2”.

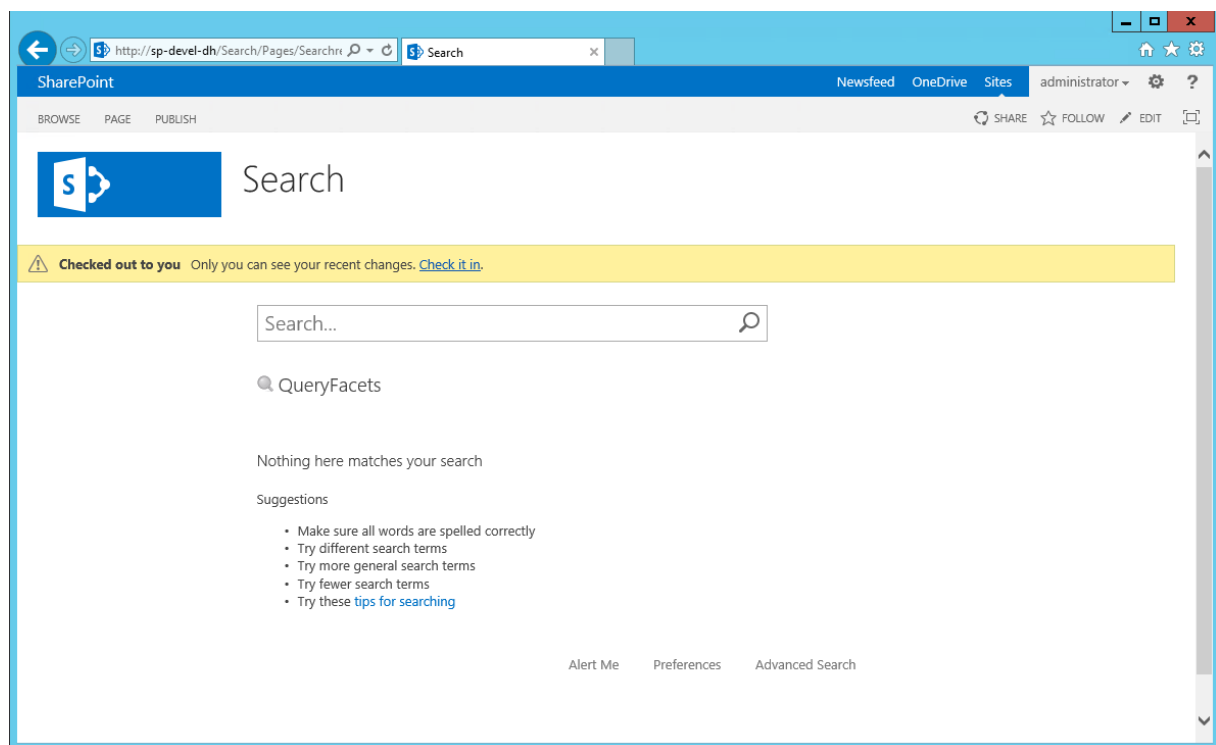
Click on “Add a Web Part” in the webpart zone “Zone 2”. Select the “Search Results” webpart from the “Search”-category and click on add.



Add the “QueryFacets” web part (optional) from the “Semantic Search”-category to the Zone 2 (you can change the web part's title to “active refiners”).

Add the “Search Box” web part (optional) from the “Search”-category to the Zone 2.

Click on “Save” to save the page.



Step 7: Add refiner web parts to the webpart-zone “Zone 1”.

Open the searchresults-page again in edit-mode.

Click on “Add a Web Part” in the webpart zone “Zone 1” and add a refinement web part from the “Search”-category.

Open the web part properties to configure the refinement webpart.

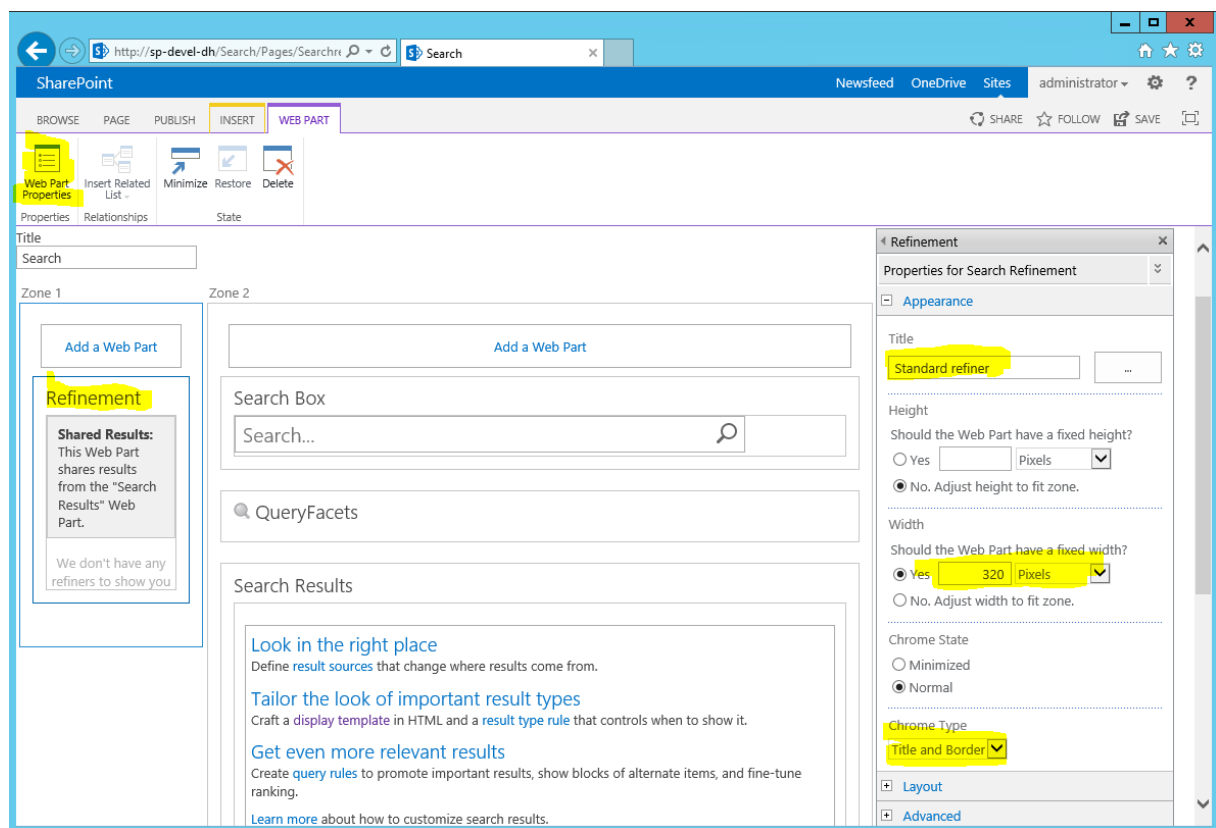
In the “Appearance”-section of the web part's configuration settings edit the Title, e.g. to “Standard Refiner”.

In the “Appearance”-section of the web part's configuration settings set the width to a fixed value, e.g. 320 pixels. Tick the “yes”-checkbox.

In the “Appearance”-section of the web part's configuration settings set the “Chrometype” to “Title and Border” or “Title only”.

Note:

Only refiner web parts will appear in tabs if their “Chrometype” is “Title and Border” or “Title only”.

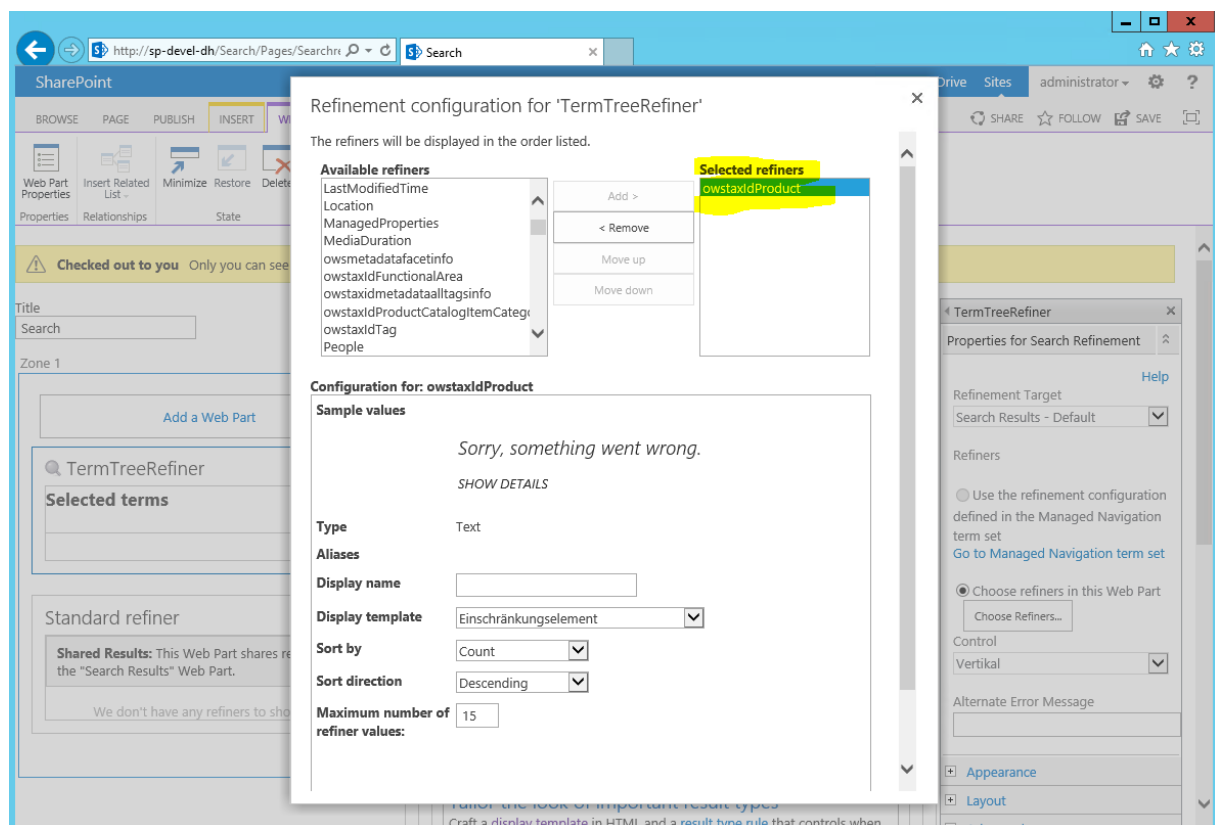


Click on “OK” to save the configuration settings.

Click again on “Add a Web Part” in the webpart zone “Zone 1” to add a “TermTreeRefiner” web part from the “Search”-category.

Open the web part properties to configure the TermTreeRefiner-web part.

In the “Properties”-section of the web part's configuration settings click on “Choose Refiners”, remove all “Selected Refiners” and select an appropriate managed property.



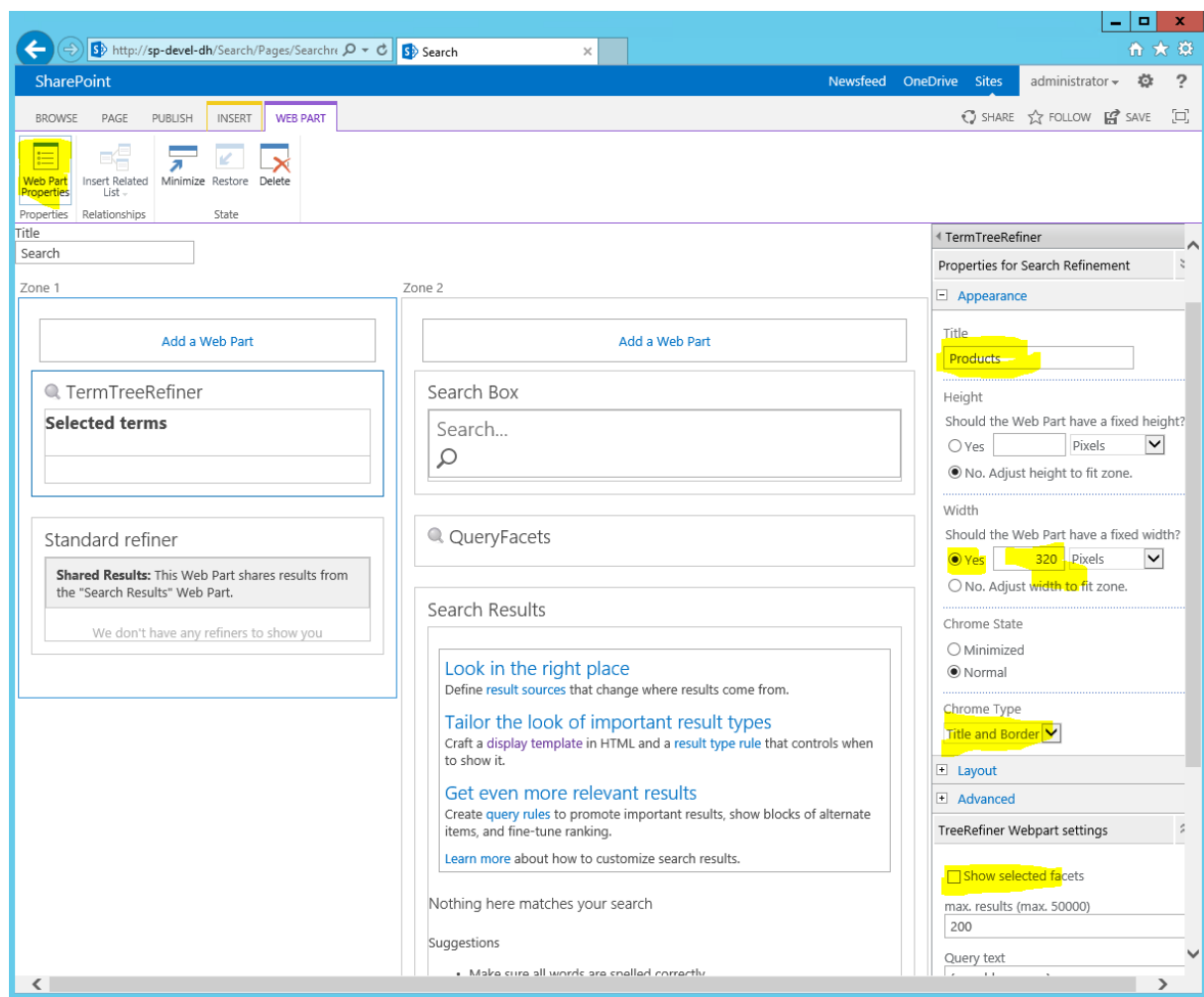
In the “Appearance”-section of the web part's configuration settings edit the Title, e.g. to “Products”.

In the “Appearance”-section of the web part's configuration settings set the width to a fixed value, e.g. 320 pixels. Tick the “yes”-checkbox.

In the “Appearance”-section of the web part's configuration settings set the “Chrometype” to “Title and Border” or “Title only”.

In the “Appearance”-section of the web part's configuration settings set the “Chrometype” to “Title and Border” or “Title only”.

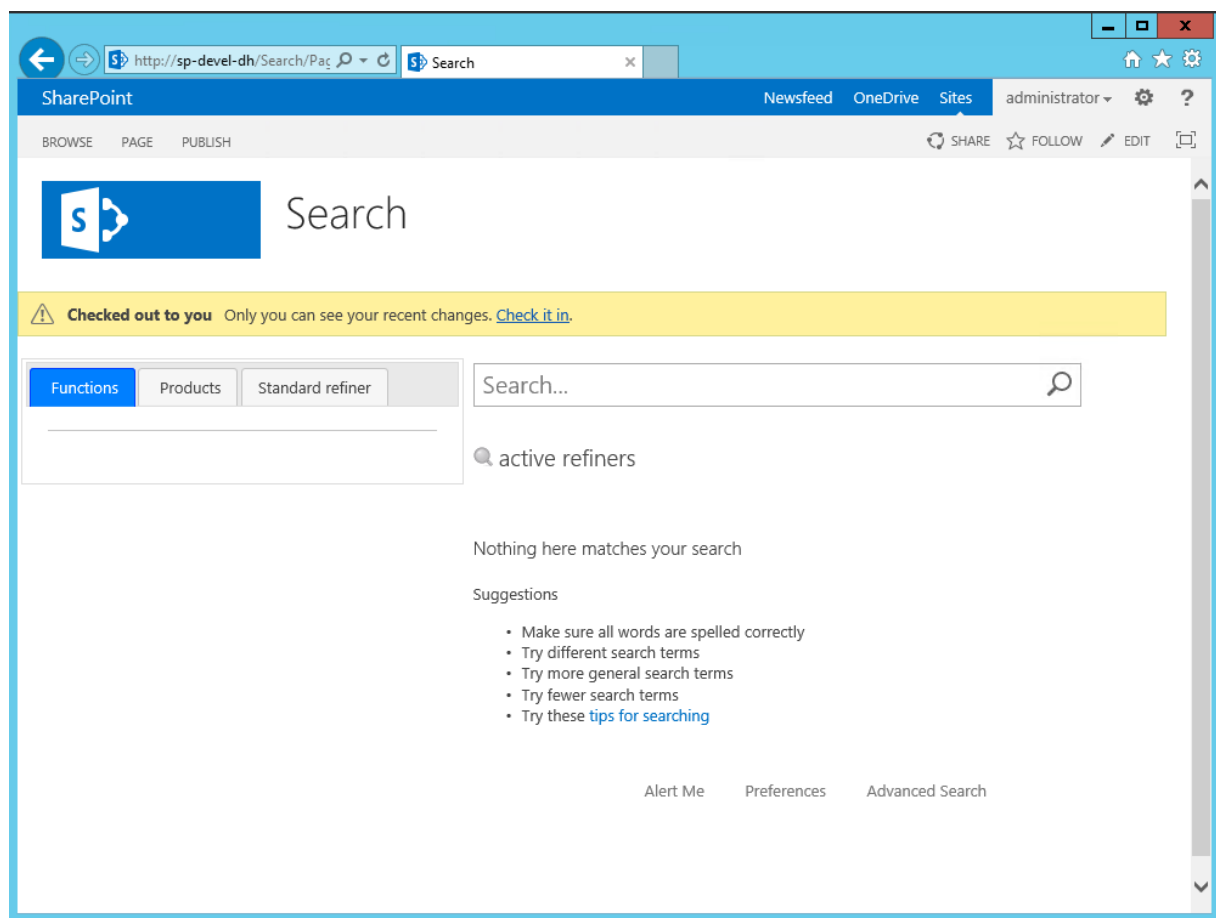
In the “TreeRefiner Webpart settings”-section of the web part's configuration settings tick off the “Show selected facets”-checkbox.



Click on "OK" to save the configuration settings.

Click again on "Add a Web Part" in the webpart zone "Zone 1" to add further "TermTreeRefiner" web parts from the "Search"-category.

Click on "Save" to save your modifications to the article.

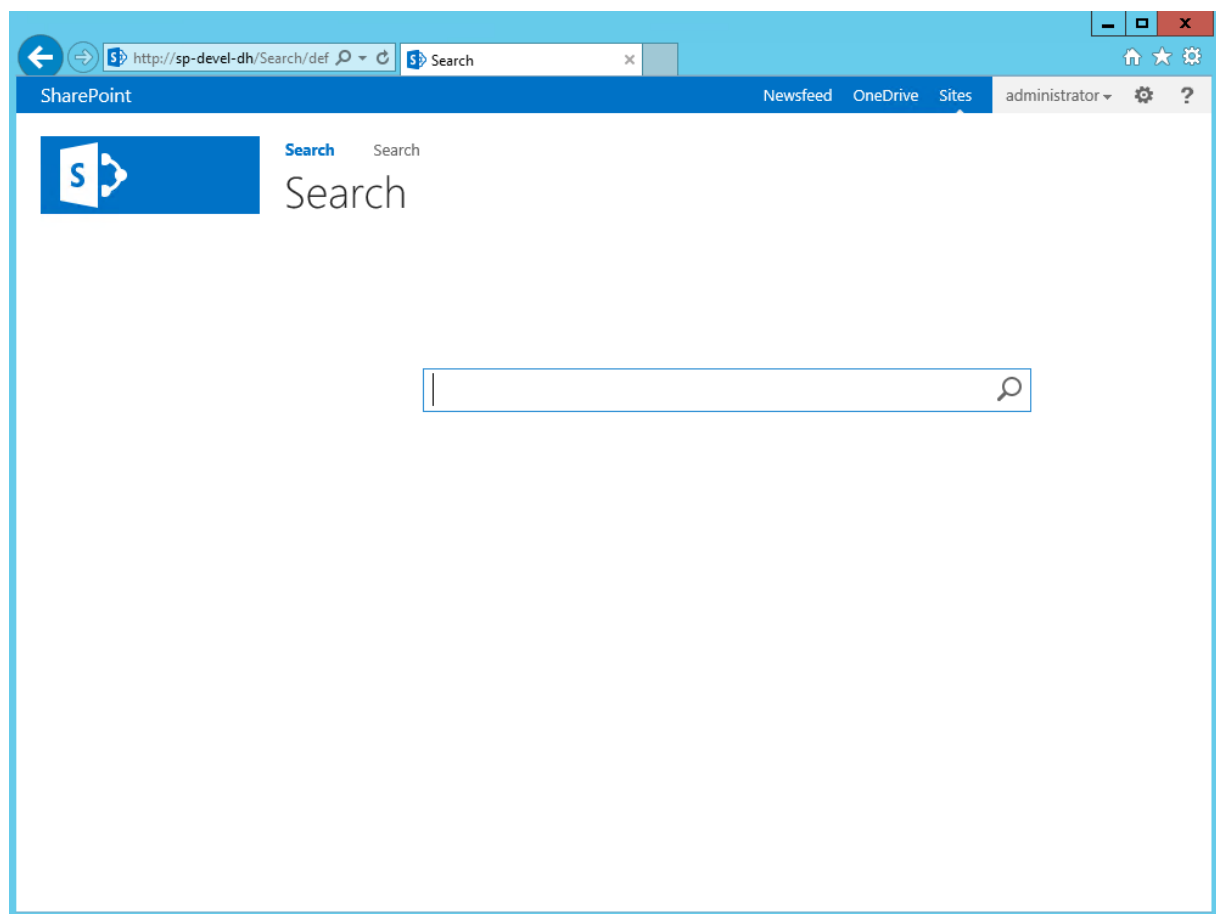


Step 8: Check in and publish your changes to the page.

Click on “Check it in” and “Publish it” Save” to make your page available to your endusers.

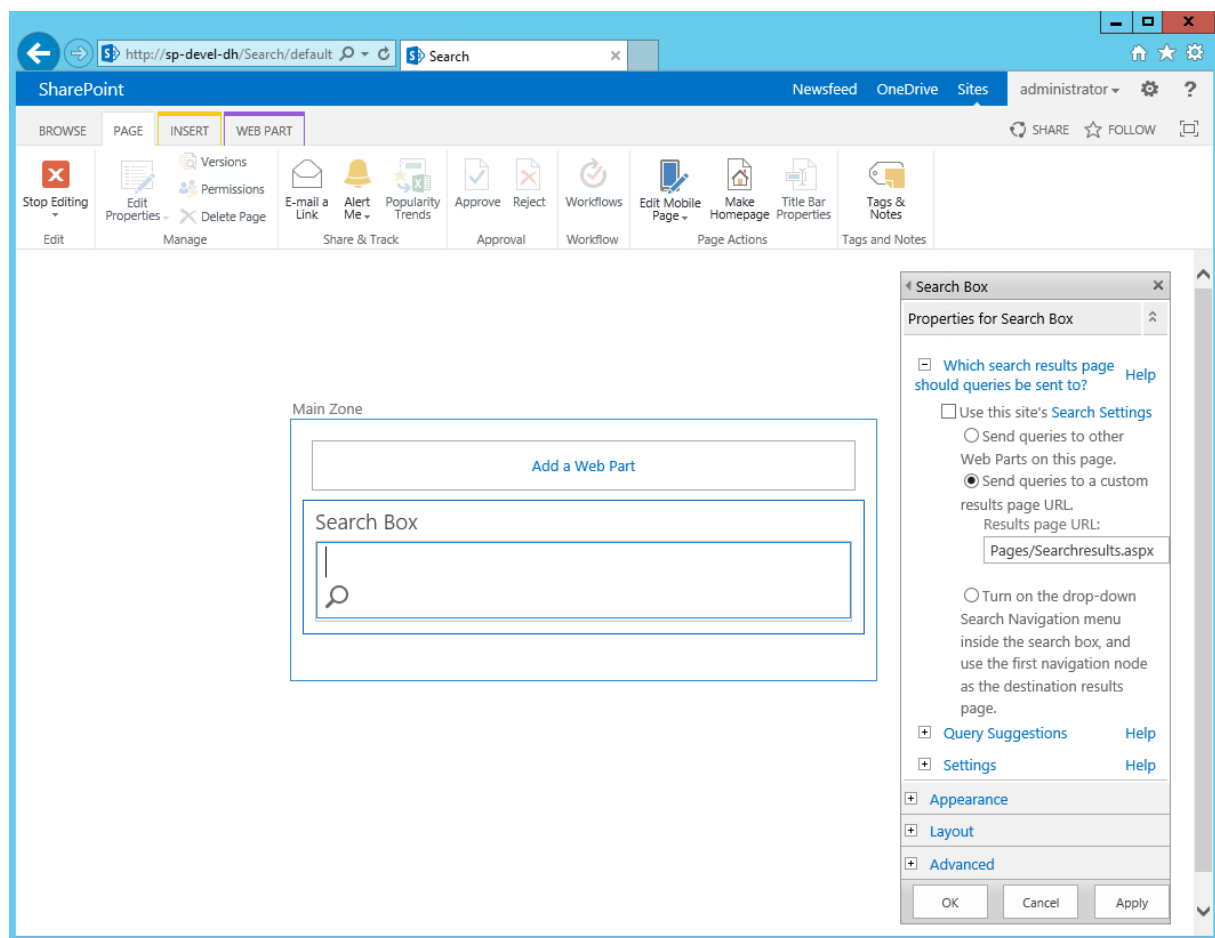
Step 9: Modify the search center landing page “default.aspx” in order to redirect search queries to your newly created searchresults-page.

Open your search center's landing page “default.aspx” by either a) clicking on the SharePoint-icon or b) opening the site contents of the parent site and clicking on the hyperlink in the “Subsites”-section that points to your search center.



Click on “Edit page” to enter the edit-mode for the page. Open the configuration settings of the Search box-web part that is included in this page.

In the configuration settings, section “Properties for Search Box”, enter the URL of your search page, e.g. “Pages/Searchresults.aspx”.



Click on "OK" to save your configuration settings and click "Stop Editing" to your changes to the page.

Note:

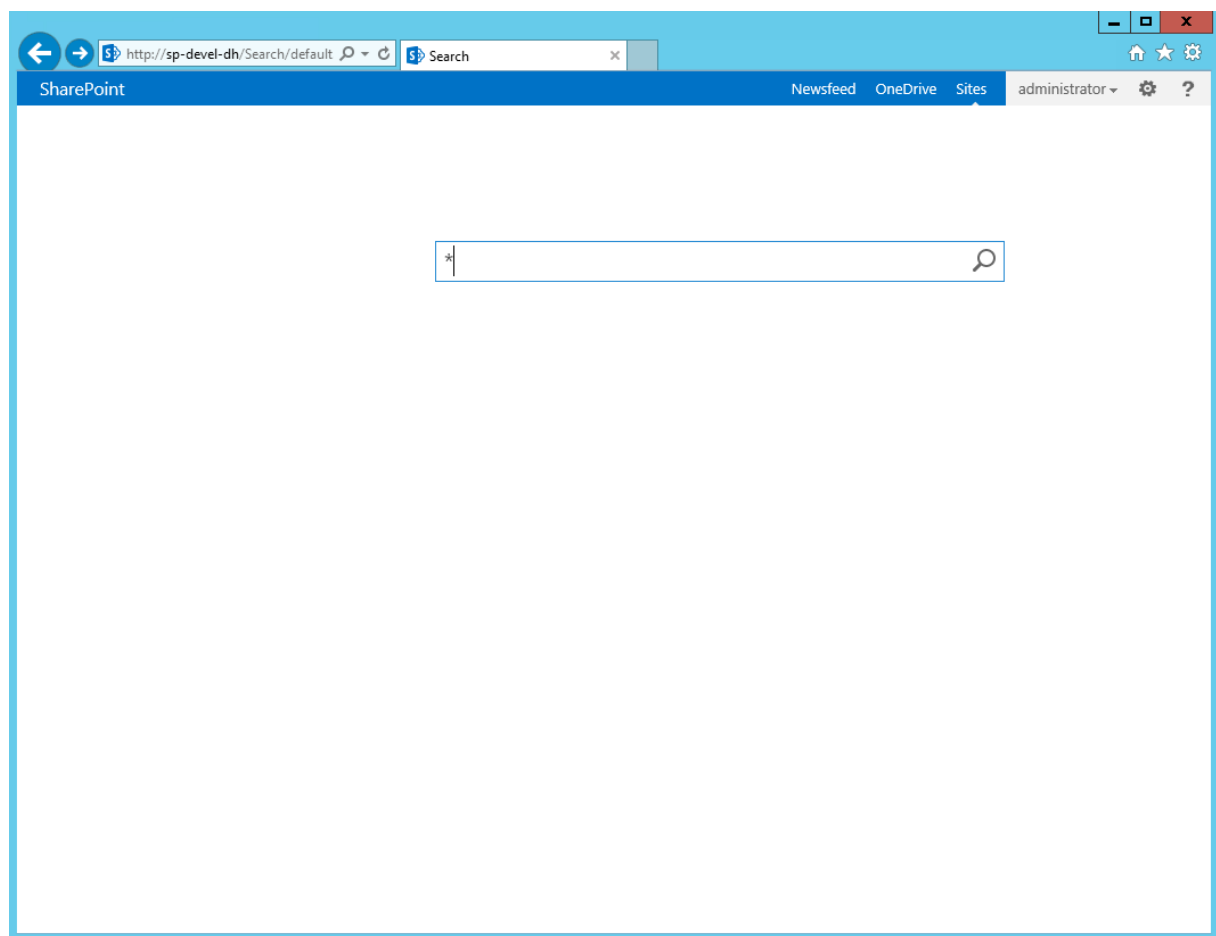
You can verify Step 9 by entering a search text into the landing page. Your search results page should open if you submit the query.

3.3.2 Usage

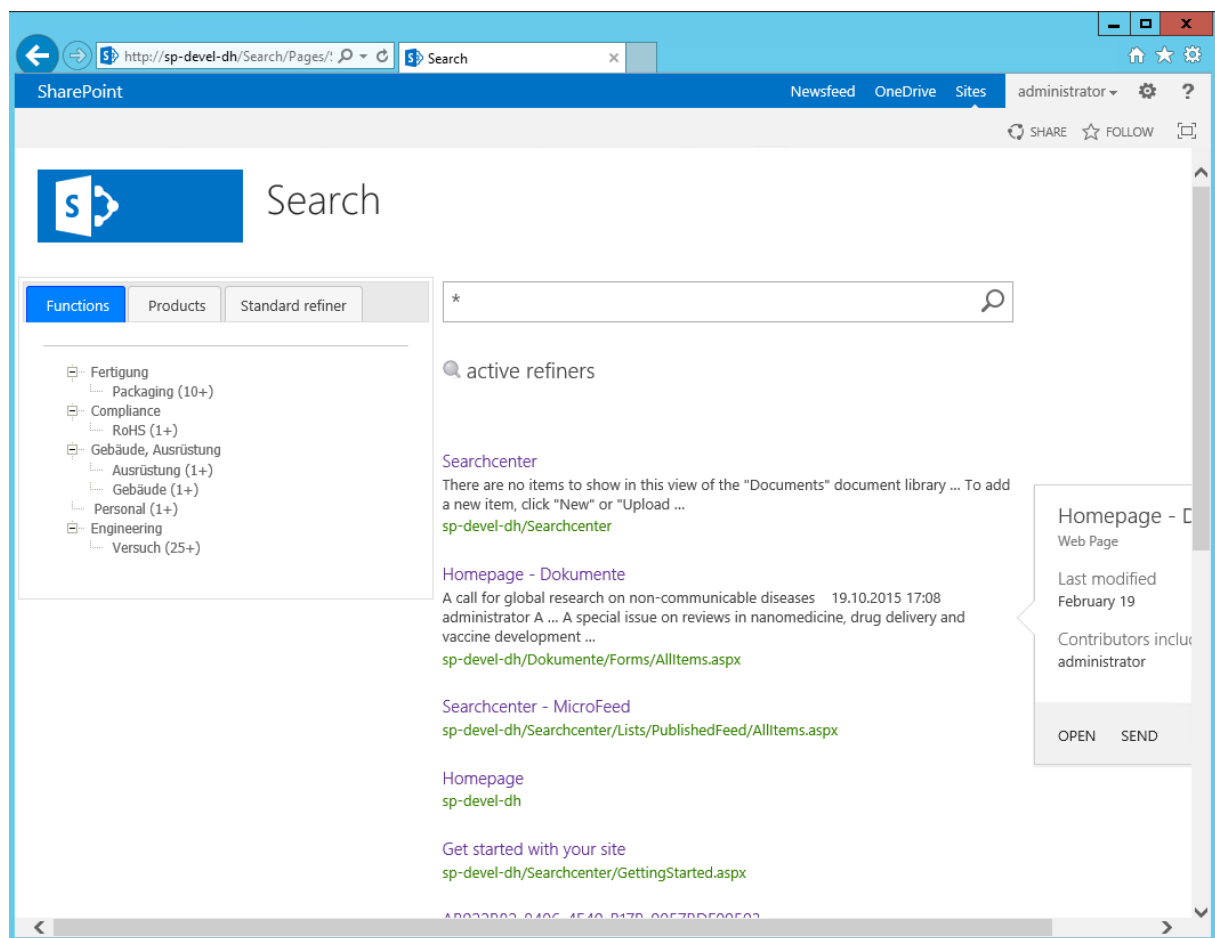
Using a search center that employs the "SearchPageLayout"-feature is similar to out-of-the-box basic or enterprise search centers.

Open the landing page of your search center.

Enter your query into the search box:

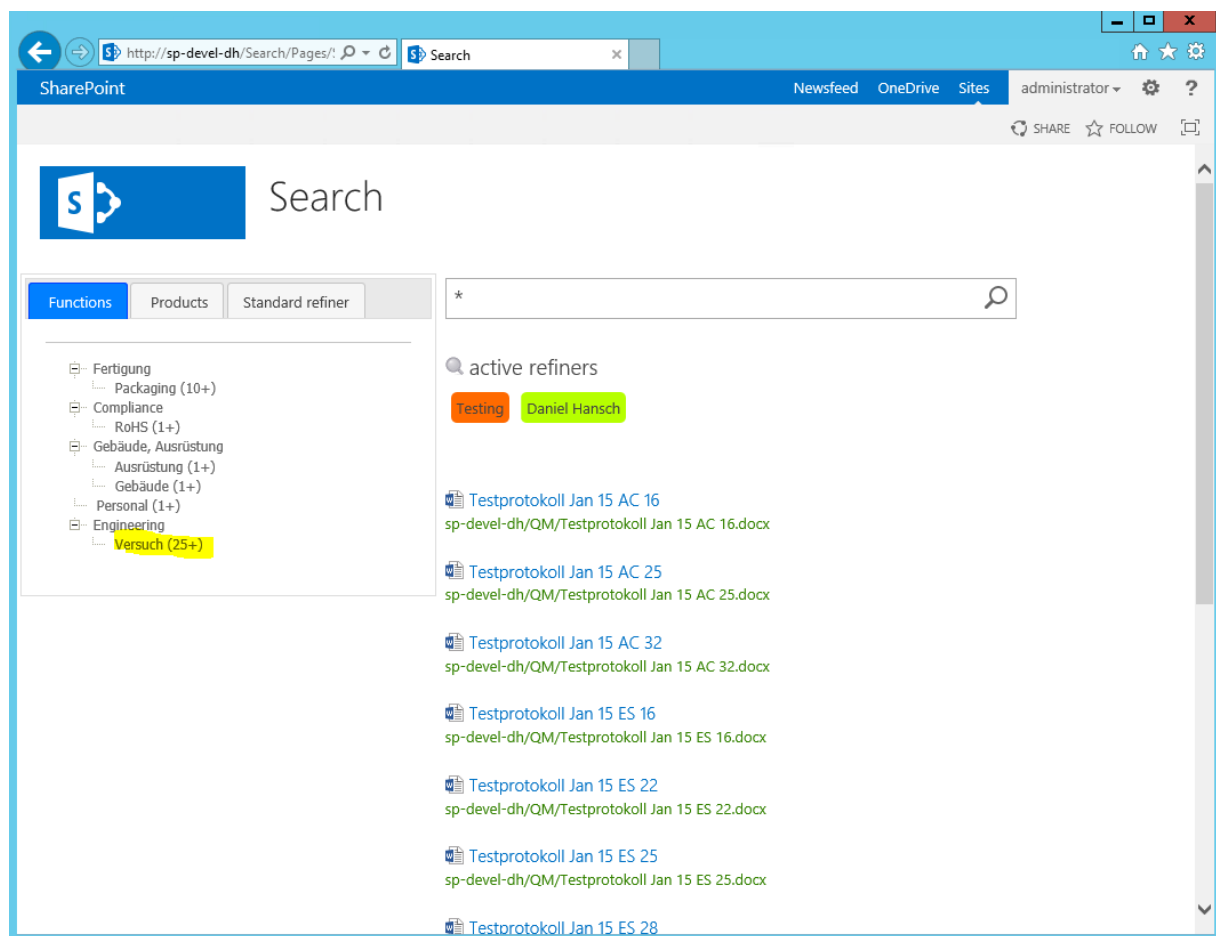


After submitting your query the search results page opens:



You can browse through the tabs to inspect the available refiners.

Click on a refiner value to further refine your search results. All currently selected refiners are listed in the "active refiners" web part.



3.4 StaticTermTree-Webpart

3.4.1 Configuration for SharePoint 2016

The StaticTermTree-webpart is documented using an example scenario that you might adapt appropriately.

Step 1: Pre-requisites

Prepare the following:

1. The configuration guidelines assume that you already have a search center in place. If this is not the case then you have to create either a basic or enterprise search center.
2. The configuration guidelines assume that you have a managed property in place (named "owstaxidsitecolumn" in the context of this guideline) that is refineable. It further assumes that the managed property represents a site column (named "SiteColumn" in the context of this guideline) of type "Managed Metadata" that uses a particular termset. You have documents that contain values for the site column.

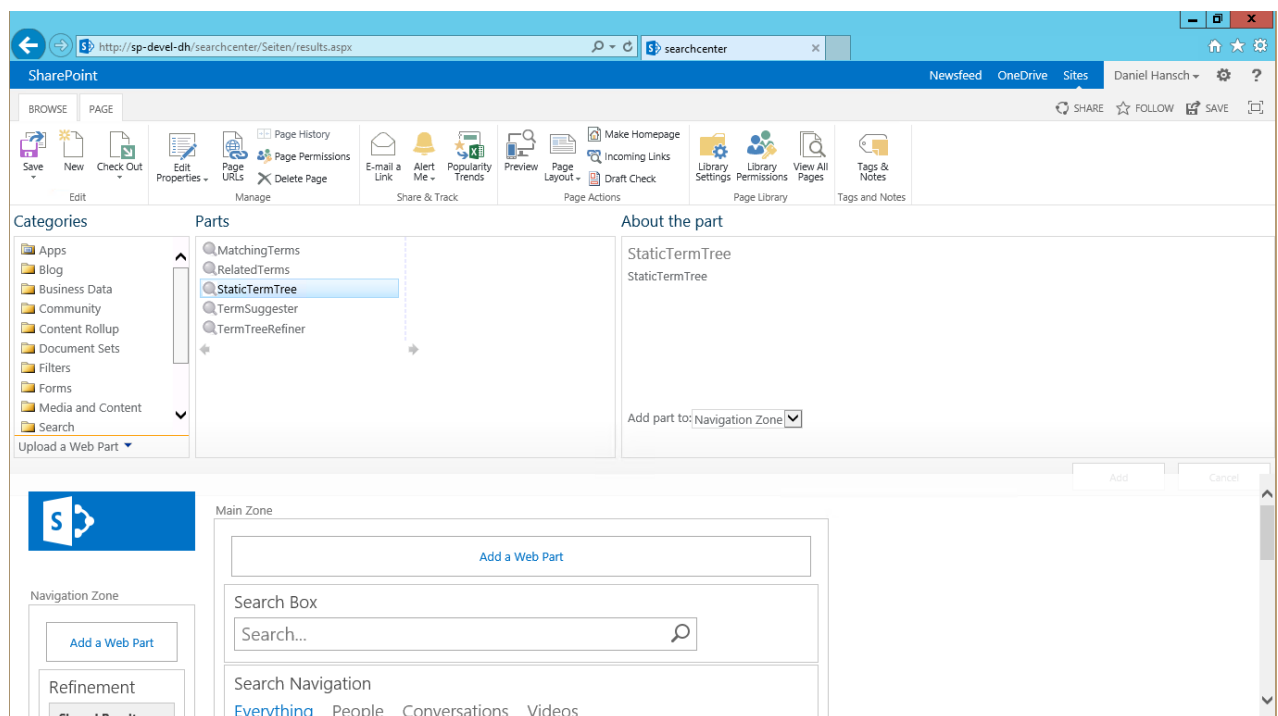
Step 2: Activate the feature "Semantic Search Web Parts" in your site collection.

Open the site settings of your search center, access the "Site Collection Features" and activate the feature "Semantic Search Web Parts". This feature is introduced by the "Semantic Search Webparts"-solution and adds this web part (amongst others):

- StaticTermTree Webpart

Step 3: Add the StaticTermTree-Webpart to the search results page

Open the search results page of your search center and add the StaticTermTree-webpart (that is contained in the webpart-category "Semantic Search") to the navigation zone.



Note:

The StaticTermTree can co-exist with the standard refiners on a search page, but NOT with the TermTreeRefiner Webpart.

Step 4: Configure the refiner

Edit the web part and open the “Choose refiners...” configuration option. Remove **all** managed properties from “selected refiners” and add a managed property, e.g. “RefinableString00”. Provide the refiner with a display name (or just enter a blank to avoid printing out a display name).

Refinement configuration for 'StaticTermTree'



The refiners will be displayed in the order listed.

Available refiners

AttachmentType
BaseOfficeLocation
ClassificationLastScan
ClassificationType
CombinedUserProfileNames
companies
contentclass
ContentType
ContentTypeId
Created

Add >

< Remove

Move up

Move down

Selected refiners

RefinableString00

Configuration for: RefinableString00

Sample values

[Show more values](#)

Sorry, something went wrong.

[SHOW DETAILS](#)

Type Text

Aliases

Display name

Display template

Einschränkungselement

Sort by

Count

Sort direction

Descending

**Maximum number of
refiner values:**

15

Preview refiners...

OK

Cancel

 Note:

Managed properties for columns that are not from type “managed metadata” are ignored.

Step 5: Configure the termstore, display and search options

Open the “StaticTree Webpart Settings” configuration.

StaticTree Webpart settings ^

Termstore

Verwalteter Metadatendienst ▾

Group

DIQA ▾

Termset

Tags ▾

☐ Hide terms: the StaticTermTree hides terms that are not present in the current search results, other terms are displayed.

☒ Display the number of search hits per term.

☐ The number of search hits per term includes the search hits of sub-terms.

☒ Expand tree nodes automatically

max. results (max. 50000)

200

Query text

{searchboxquery}

Result Source ID

8413cd39-2156-4e00-b54d-11efd9a1

OK Cancel Apply

Select 1) the **termmanagement** service, 2) the **termgroup** and 3) the **termset**.

Select the option "**Hide terms**" if you want to hide terms that have no results in the current user search (requires the option "Display the number of search hits per term". Otherwise the term tree contains all terms from the termset.

Select the option **"Display the number of search hits per term"** if you want to show the number of search hits for each term in the term tree. Otherwise the term tree is displayed without indications of the number of search hits.

Select the option **"The number of search hits per term includes the search hits of subterms"** if you want aggregate the number of search hits per term according to the term hierarchy (requires the option "Display the number of search hits per term". Otherwise the number of search hits for a term contains search hits of this term only.

Select the option **"Expand the tree nodes automatically"** if you want to show the number of search hits for each term in the term tree. Otherwise the tree is initially collapsed.

Step 6: Specify the maximum number of search results, query text and result source (required if the option "display the number of search hits per term" is active)

The options in the following must be specified if the option "display the number of search hits per term" is active!

6.1 Enter a number for "max. results" (default: 200):

For efficiency reasons the StaticTermTree examines only a limited number of search results when counting the search hits per term. Enter in the field "max. Anzahl Ergebnisse"/"max. results" the maximum number of search results that should be examined. Please note: if you select a number that is too low then not all search results might be reflected in the number of search hits per term. The bigger the number, the longer is the loading time of the number of search hits.

6.2 Enter the "Query Text"/ "Abfragetext":

Copy the Query Text-string from the search results webpart (that is located on the same search page!) and paste it into the "QueryText"/ "Abfragetext" field of the StaticTermTree setting. The string must be identical in both webparts in order to avoid that the number of search hits differ in the StaticTermTree and the search results webpart.

The "Query Text"/ "Abfragetext" must contain atleast {searchboxquery}.

Trouble shooting note:

The query Text field does NOT accept statements in curly brackets (EXCEPT "{searchboxquery}", like {Page.MyField1} {URLToken.1} {User.Name} etc.

If your search results webpart contains curly bracket statements, then you have to remove them from the search results webpart. Otherwise the term frequencies will differ from the search results.

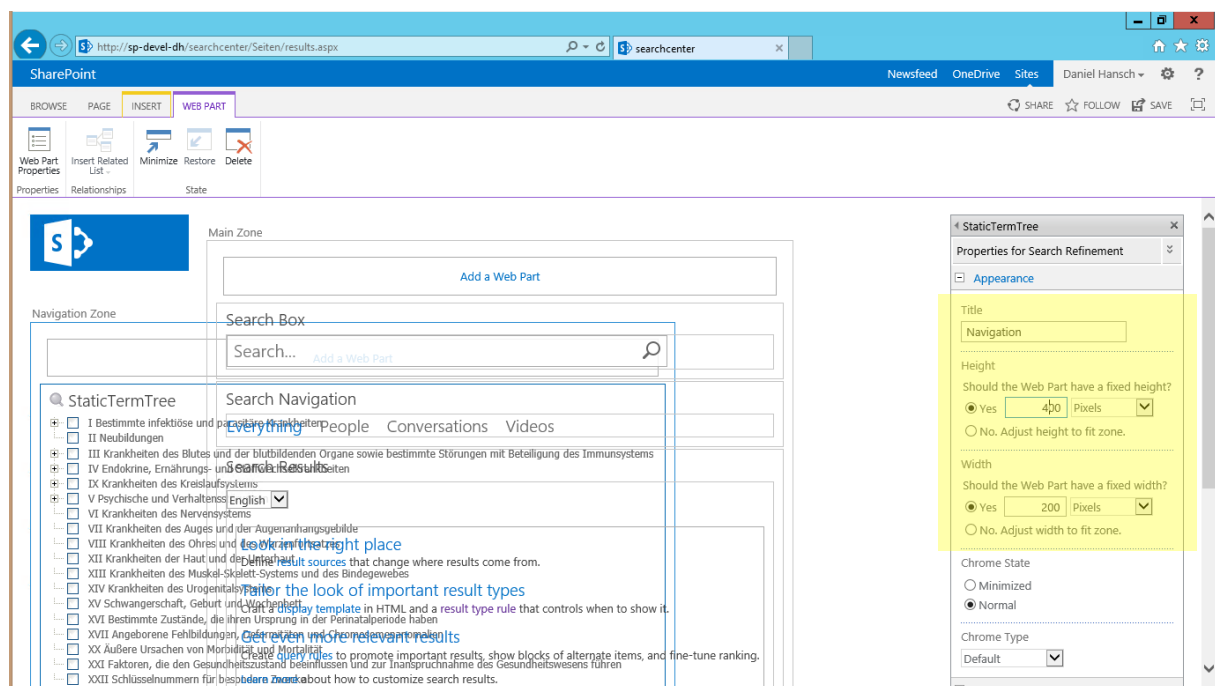
6.3 Enter the ID of the result source into the field "Result Source ID".

Where to find the Result Source ID:

5. Open the configuration of the "Search Results WebPart" of your search page and identify the name of the relevant result source.
6. Open the configuration page of the relevant result source, e.g.:
http://yoursharepoint/_layouts/15/EditResultSource.aspx?level=site&sourceid=8413cd39%2D2156%2D4e00%2Db54d%2D11efd9abdb89&view=1
7. Pick the parameter „sourceid“ from the URL, e.g.
8413cd39%2D2156%2D4e00%2Db54d%2D11efd9abdb89
8. URL-decode the parameter to get the Result Source ID, e.g. 8413cd39-2156-4e00-b54d-11efd9abdb89

Step 7: Configure the appearance of the webpart (optional)

Open the "Appearance" configuration option and enter the title, width and height of the webpart.



Step 8: Save the configuration

Save the webpart and the page.

Step 9: IMPORTANT: Create a schema mapping to your refinable managed property

Open the search schema and click on the hyperlink "Managed Properties" to retrieve the list of managed properties.

Enter the name of the refinable managed property that you have selected as refiner in step 6 (e.g. "RefinableString00") into the filter and apply the filter to retrieve it in the list of refinable managed properties for strings.

SharePoint | Newsfeed | OneDrive | Sites | Daniel Hansch

Suchdienstanwendung: Managed Properties

[Managed Properties](#) | [Crawled Properties](#) | [Categories](#)

Use this page to view, create, or modify managed properties and map crawled properties to managed properties. Crawled properties are automatically extracted from crawled content. You can use managed properties to restrict search results, and present the content of the properties in search results. Changes to properties will take effect after the next full crawl. Note that the settings that you can adjust depend on your current authorization level.

Filter

Managed property:

Total Count = 100

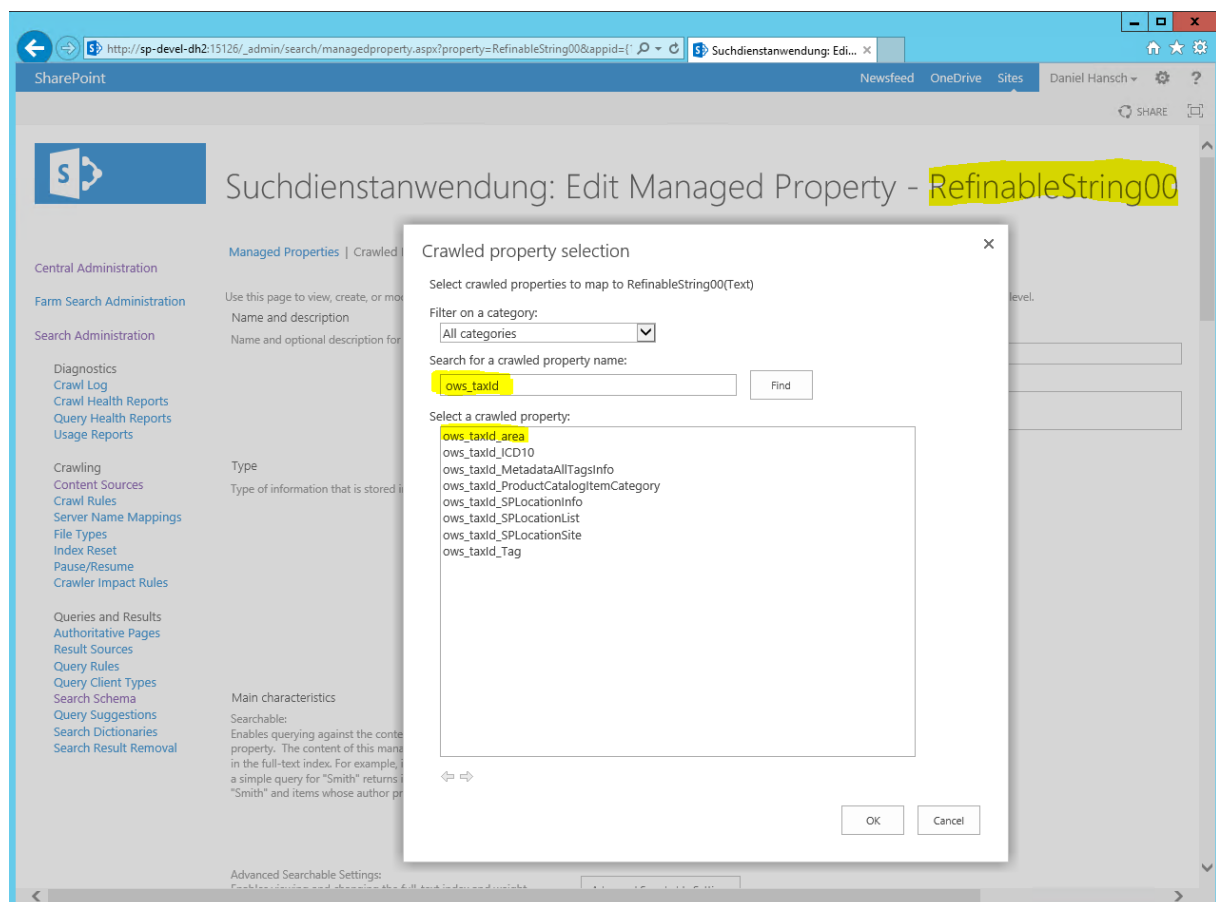
New Managed Property

Property Name	Type	Multi	Query	Search	Retrieve	Refine	Sort	Safe	Mapped Crawled Properties
RefinableString00	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString01	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString02	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString03	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString04	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString05	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString06	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString07	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString08	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString09	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString10	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	
RefinableString11	Text	Multi	Query	-	Retrieve	Refine	Sort	Safe	

Identify your RefinableString-property and click on it to open it in edit mode.

The edit mode of the RefinableString-property contains the section "Mappings to crawled properties". Click on the button named "Add a mapping" to open a popup window.

In the popup window, enter the string "ows_taxid" and click on "Find" to retrieve the list of crawled properties of type "Managed Metadata".



Select in the list of crawled properties the property that corresponds to your site column. Click on "OK" to save the setting and close the popup window.



If you cannot find a crawled property that corresponds to your site column, then your full crawl has not terminated yet.

Click on "OK" to save the setting of the managed property and to leave the edit mode.

Step 10: Verify the treeview

Open again the search page and enter an appropriate search term, e.g. "*". The StaticTermTree should now display the taxonomy(s) from your site column(s). You can expand/collapse sub-trees.

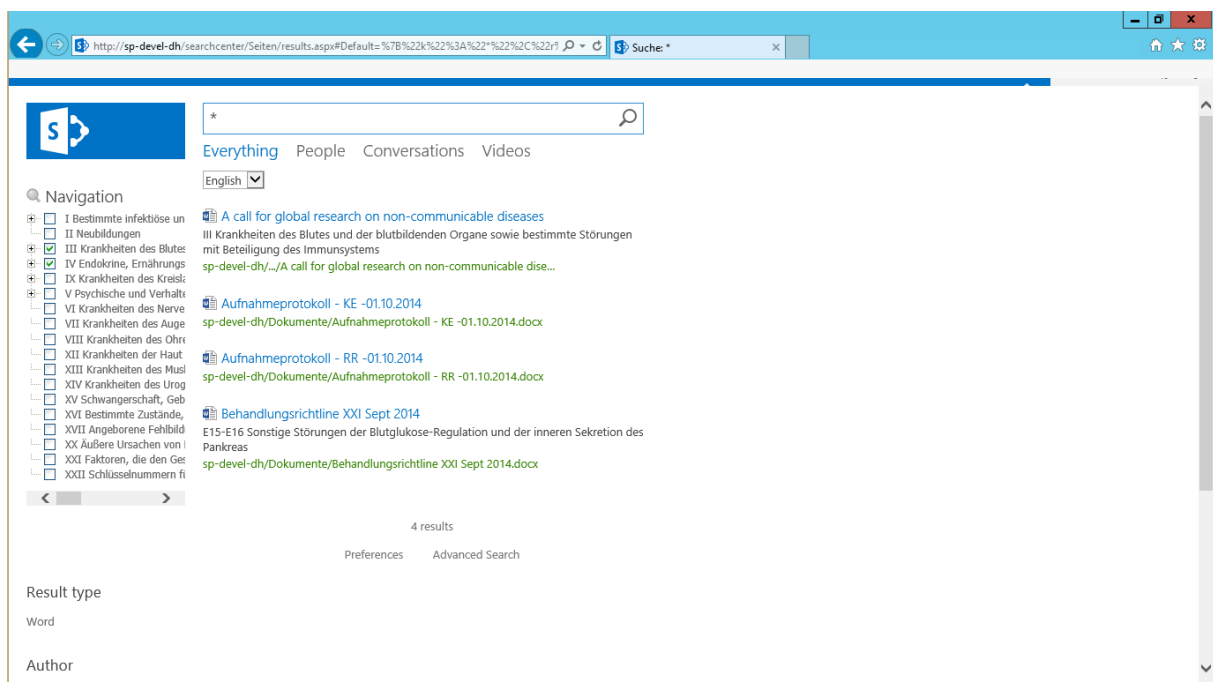
Trouble shooting note:

Causes for an empty StaticTermTree:

2. The sitecolumn is not using a termset that has terms. Open the site column and verify that it properly uses a termset with terms.

Enter the asterisk “*” into the searchbox and hit return. All search hits from the current scope should be displayed.

Select a value from the StaticTermTree by ticking a check box. The number of search hits should be reduced to documents that are tagged with the selected value AND subterms thereof.



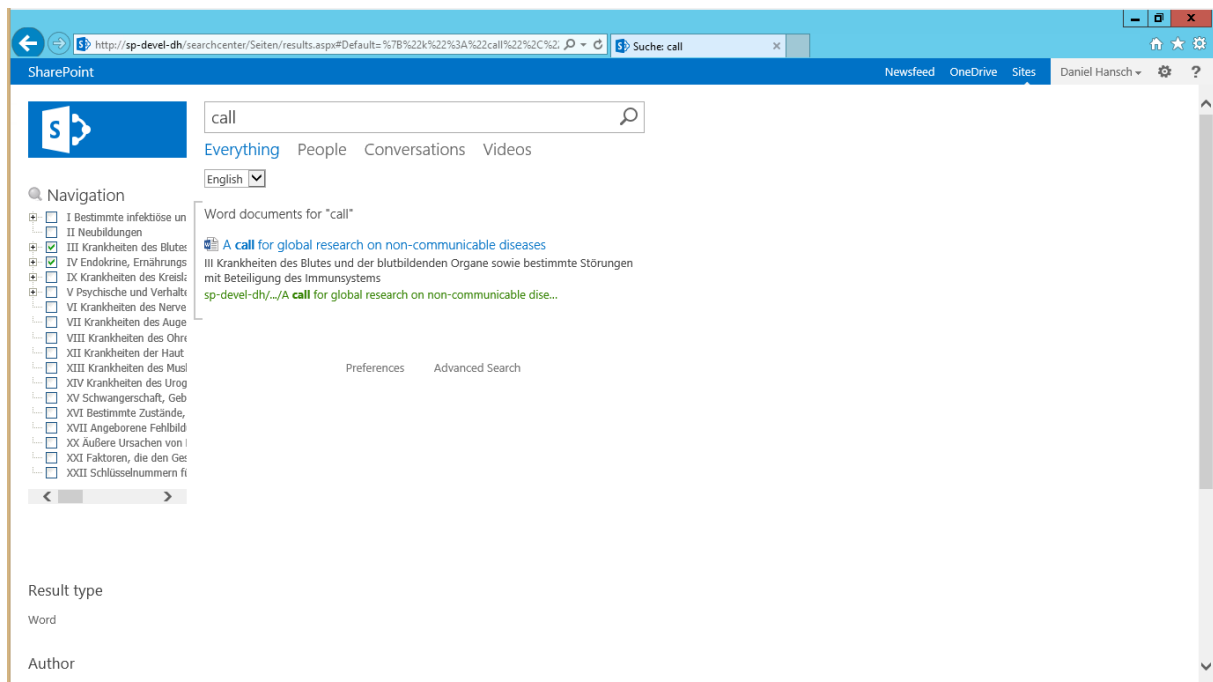
Trouble shooting note:

Causes for an empty result set:

2. In your current search scope are no documents that are tagged with the selected value or subterms thereof. Make sure that you have atleast 1 document with the appropriate tag and perform a fullcrawl.

Enter a search term into the searchbox and hit return.

The search results are reduced to documents that are tagged with the selected value(s) (or subterms thereof) AND that contain the search term.



3.4.2 Configuration for SharePoint 2013

The StaticTermTree-webpart is documented using an example scenario that you might adapt appropriately.

Step 1: Pre-requisites

Prepare the following:

3. The configuration guidelines assume that you already have a search center in place. If this is not the case then you have to create either a basic or enterprise search center.
4. The configuration guidelines assume that you have a managed property in place (named "owstaxidsitecolumn" in the context of this guideline) that is refineable. It further assumes that the managed property represents a site column (named "SiteColumn" in the context of this guideline) of type "Managed Metadata" that uses a particular termset. You have documents that contain values for the site column.

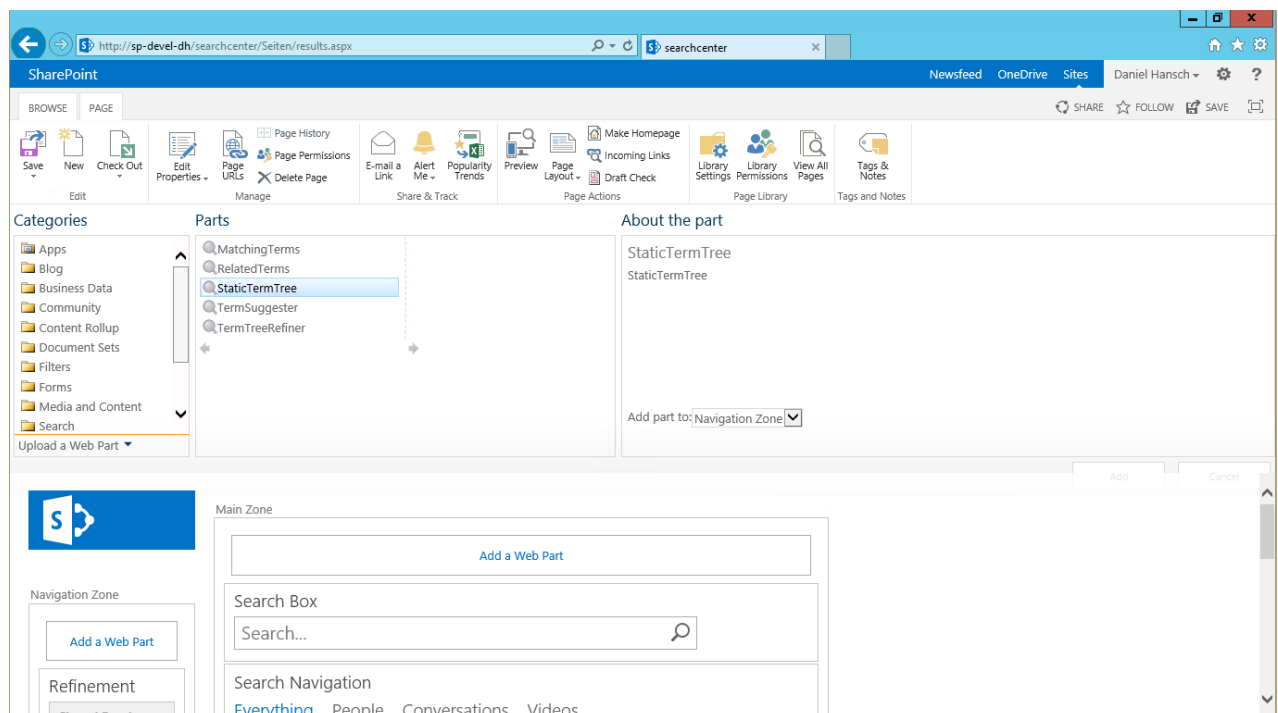
Step 2: Activate the feature "Semantic Search Web Parts" in your site collection.

Open the site settings of your search center, access the "Site Collection Features" and activate the feature "Semantic Search Web Parts". This feature is introduced by the "Semantic Search Webparts"-solution and adds this web part (amongst others):

- StaticTermTree Webpart

Step 3: Add the StaticTermTree-Webpart to the search results page

Open the search results page of your search center and add the StaticTermTree-webpart (that is contained in the webpart-category "Semantic Search") to the navigation zone.

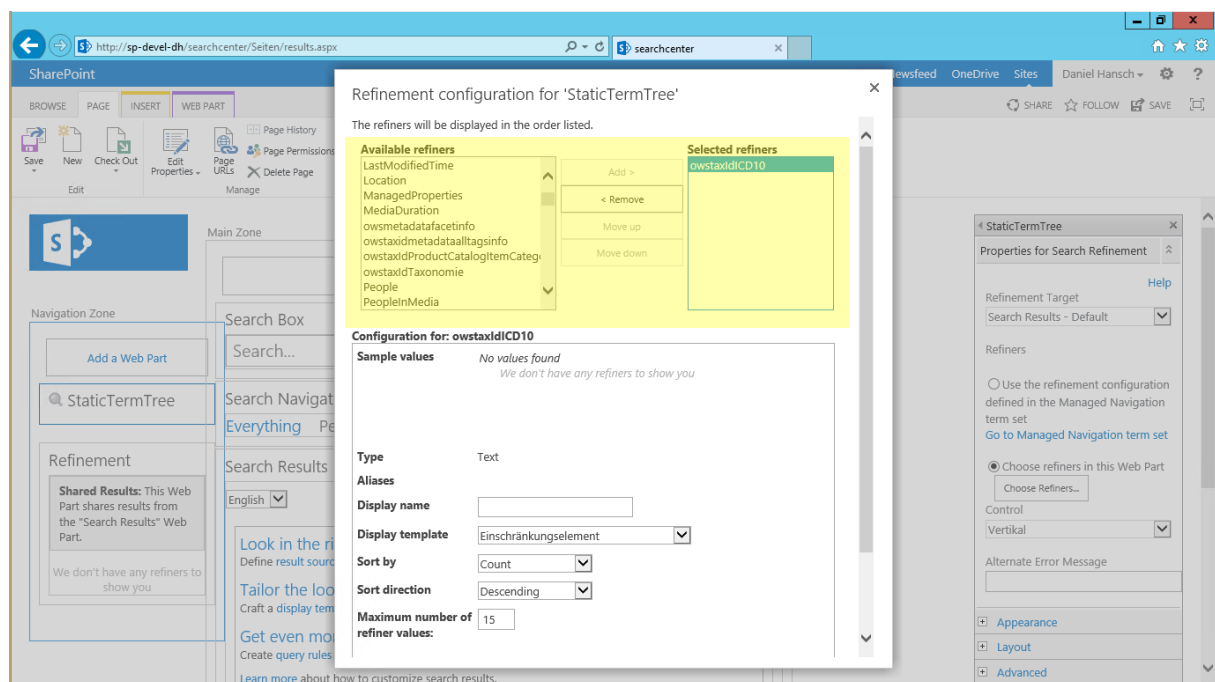


Note:

The StaticTermTree can co-exist with the standard refiners on a search page, but NOT with the TermTreeRefiner Webpart.

Step 4: Configure the refiner

Edit the web part and open the "Choose refiners..." configuration option. Remove **all** managed properties from "selected refiners" and add a managed property, e.g. "owstaxidsitecolumn" (or any other managed property for a column from type "managed metadata"). Provide the refiner with a display name (or just enter a blank to avoid printing out a display name).



Note:

Managed properties for columns that are not from type “managed metadata” are ignored.

Step 5: Configure the termstore, display and search options

Open the “StaticTree Webpart Settings” configuration.

StaticTree Webpart settings ^

Termstore

Verwalteter Metadatendienst ▾

Group

DIQA ▾

Termset

Tags ▾

☐ Hide terms: the StaticTermTree hides terms that are not present in the current search results, other terms are displayed.

☒ Display the number of search hits per term.

☐ The number of search hits per term includes the search hits of sub-terms.

☒ Expand tree nodes automatically

max. results (max. 50000)

200

Query text

{searchboxquery}

Result Source ID

8413cd39-2156-4e00-b54d-11efd9a1

OK Cancel Apply

Select 1) the **termmanagement** service, 2) the **termgroup** and 3) the **termset**.

Select the option "**Hide terms**" if you want to hide terms that have no results in the current user search (requires the option "Display the number of search hits per term". Otherwise the term tree contains all terms from the termset.

Select the option **"Display the number of search hits per term"** if you want to show the number of search hits for each term in the term tree. Otherwise the term tree is displayed without indications of the number of search hits.

Select the option **"The number of search hits per term includes the search hits of subterms"** if you want aggregate the number of search hits per term according to the term hierarchy (requires the option "Display the number of search hits per term". Otherwise the number of search hits for a term contains search hits of this term only.

Select the option **"Expand the tree nodes automatically"** if you want to show the number of search hits for each term in the term tree. Otherwise the tree is initially collapsed.

Step 6: Specify the maximum number of search results, query text and result source (required if the option "display the number of search hits per term" is active)

The options in the following must be specified if the option "display the number of search hits per term" is active!

6.1 Enter a number for "max. results" (default: 200):

For efficiency reasons the StaticTermTree examines only a limited number of search results when counting the search hits per term. Enter in the field "max. Anzahl Ergebnisse"/"max. results" the maximum number of search results that should be examined. Please note: if you select a number that is too low then not all search results might be reflected in the number of search hits per term. The bigger the number, the longer is the loading time of the number of search hits.

6.2 Enter the "Query Text"/ "Abfragetext":

Copy the Query Text-string from the search results webpart (that is located on the same search page!) and paste it into the "QueryText"/ "Abfragetext" field of the StaticTermTree setting. The string must be identical in both webparts in order to avoid that the number of search hits differ in the StaticTermTree and the search results webpart.

The "Query Text"/ "Abfragetext" must contain atleast {searchboxquery}.

Trouble shooting note:

The query Text field does NOT accept statements in curly brackets (EXCEPT "{searchboxquery}", like {Page.MyField1} {URLToken.1} {User.Name} etc.

If your search results webpart contains curly bracket statements, then you have to remove them from the search results webpart. Otherwise the term frequencies will differ from the search results.

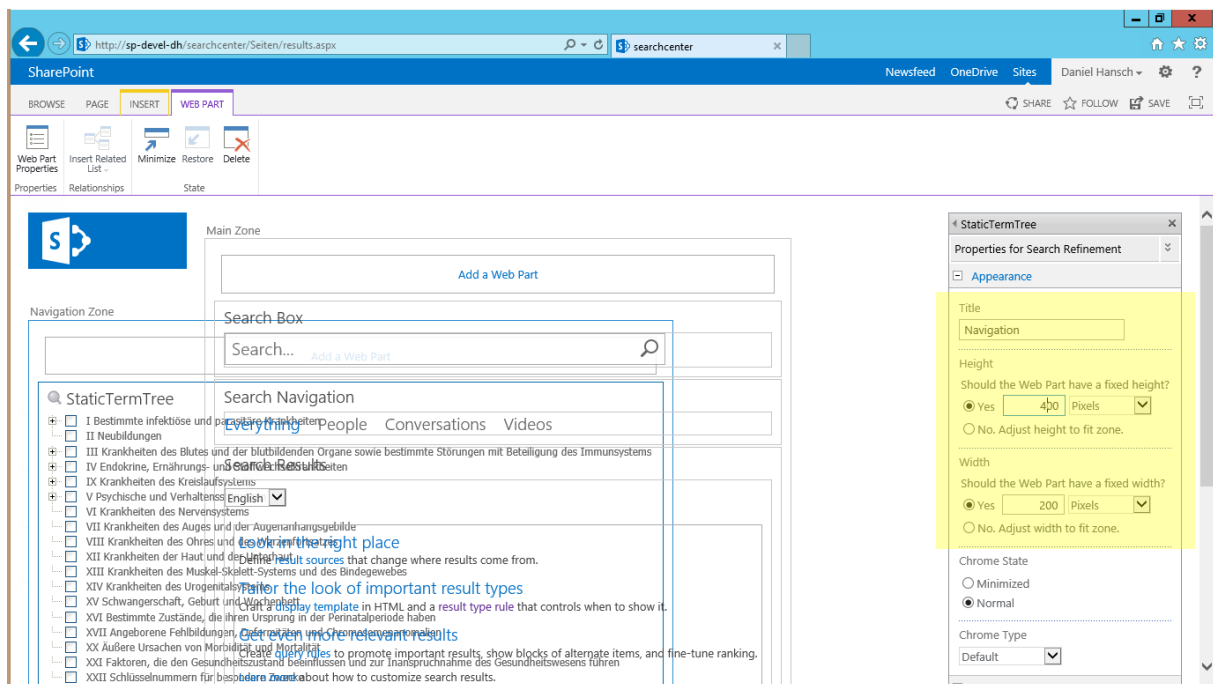
6.3 Enter the ID of the result source into the field "Result Source ID".

Where to find the Result Source ID:

1. Open the configuration of the "Search Results WebPart" of your search page and identify the name of the relevant result source.
2. Open the configuration page of the relevant result source, e.g.:
http://yoursharepoint/_layouts/15/EditResultSource.aspx?level=site&sourceid=8413cd39%2D2156%2D4e00%2Db54d%2D11efd9abdb89&view=1
3. Pick the parameter „sourceid“ from the URL, e.g.
8413cd39%2D2156%2D4e00%2Db54d%2D11efd9abdb89
4. URL-decode the parameter to get the Result Source ID, e.g. 8413cd39-2156-4e00-b54d-11efd9abdb89

Step 7: Configure the appearance of the webpart (optional)

Open the "Appearance" configuration option and enter the title, width and height of the webpart.



Step 8: Save the configuration and verify proper operation

Save the webpart and the page.

The StaticTermTree should now display the taxonomy(s) from your site column(s). You can expand/collapse sub-trees.

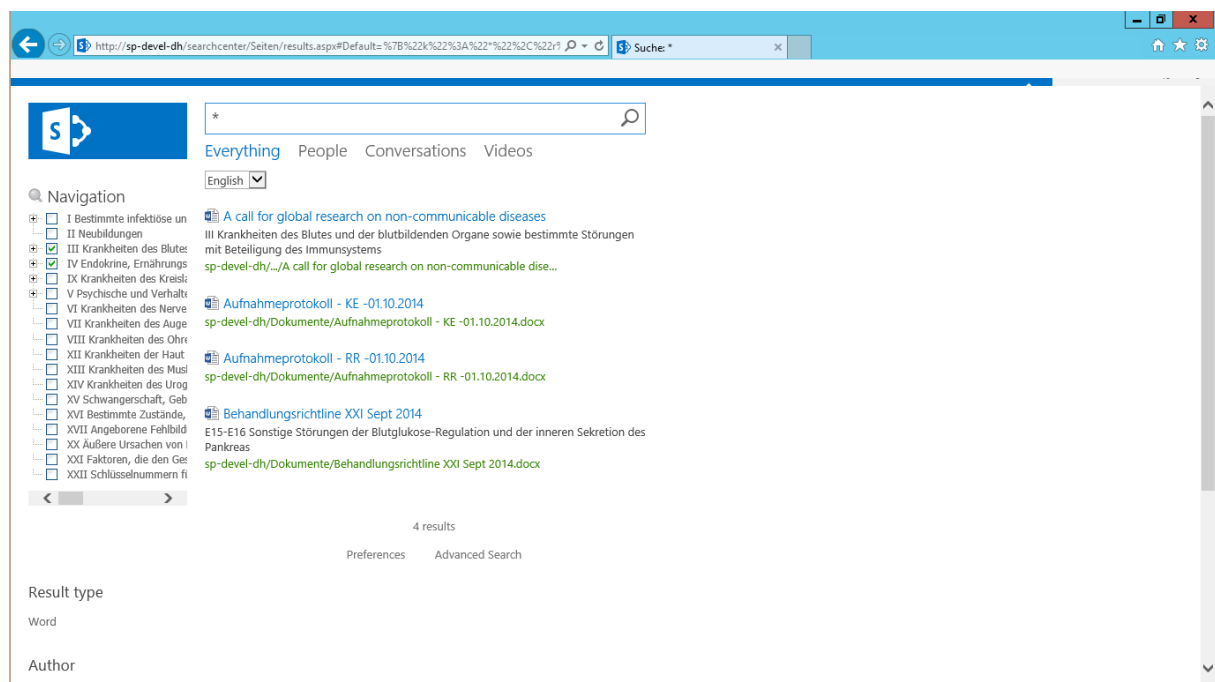
Trouble shooting note:

Causes for an empty StaticTermTree:

1. The sitecolumn is not using a termset that has terms. Open the site column and verify that it properly uses a termset with terms.

Enter the asterisk "*" into the searchbox and hit return. All search hits from the current scope should be displayed.

Select a value from the StaticTermTree by ticking a check box. The number of search hits should be reduced to documents that are tagged with the selected value AND subterms thereof.



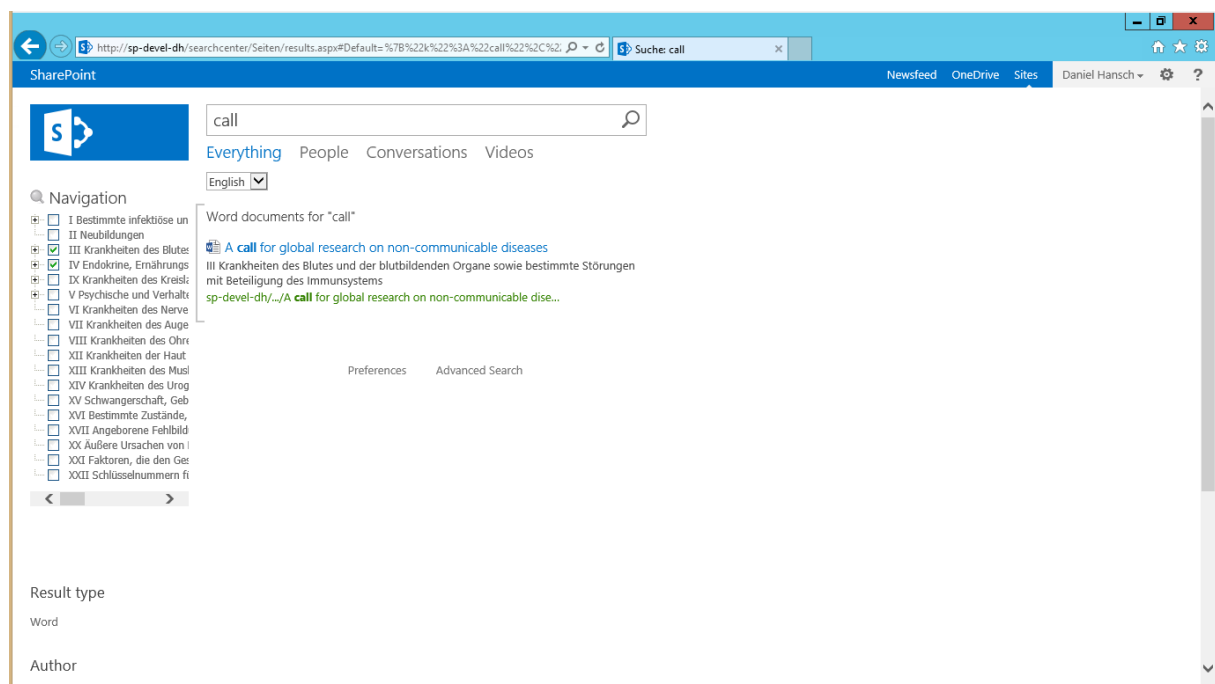
Trouble shooting note:

Causes for an empty result set:

1. In your current search scope are no documents that are tagged with the selected value or subterms thereof. Make sure that you have atleast 1 document with the appropriate tag and perform a fullcrawl.

Enter a search term into the searchbox and hit return.

The search results are reduced to documents that are tagged with the selected value(s) (or subterms thereof) AND that contain the search term.



3.4.3 Usage

The StaticTermTree is similar to the *navigation hierarchy* feature from lists and libraries².

To make it easier for users to find content in large search scope, you can add the StaticTermTree to the search center. The StaticTermTree enables users to dynamically filter and find content in the search scope by using a navigation hierarchy tree control to apply different metadata-based filters. Search terms can be used in combination with the StaticTermTree to refine the result list.

The StaticTermTree co-exists with the standard refiner and, thus, allows to apply further filters to the result list.

² <https://support.office.com/en-sg/article/Configure-metadata-navigation-for-a-list-or-library-a8ddfc11-a486-4e0f-b1b1-f10ca79fa9bc>

3.5 TermSuggester Webpart

The TermSuggester webpart replaces the original SearchBox and adds autocomplete functionality for identifying taxonomy terms, while entering a search query.

3.5.1 Configuration for SharePoint 2016 and 2013

Step 1: Pre-requisites

Prepare the following:

1. The configuration guidelines assume that you already have a search center in place. If this is not the case, then you have to create either a basic or enterprise search center.

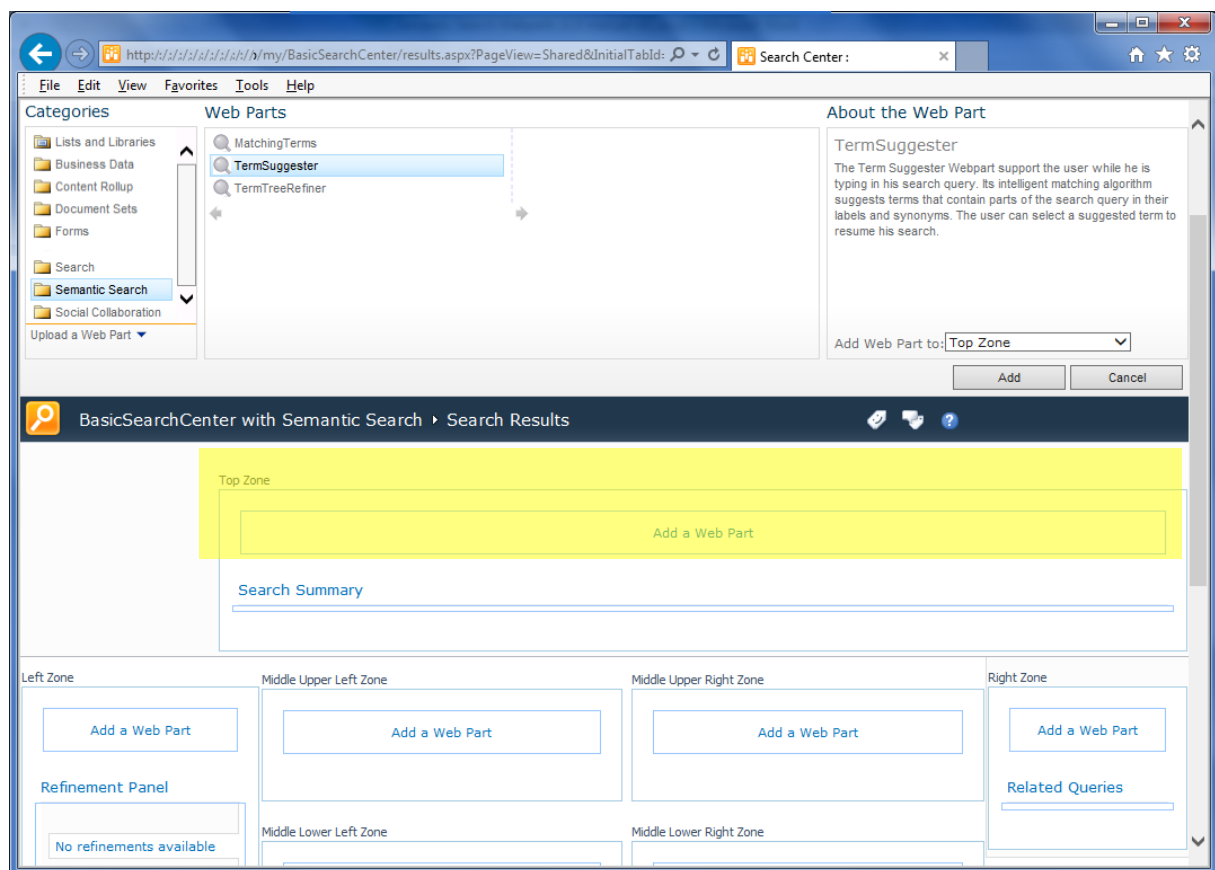
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

Open the site settings of your search center, access the “Site Collection Features” and activate the feature “Semantic Search Web Parts”. This feature is introduced by the “Semantic Search Webparts”-solution and adds this web part (amongst others):

- TermSuggester Webpart

Step 3: Add the TermTreeRefiner to the search results page

We recommend adding the TermSuggester webpart on the top of the search page, into the “Top zone” instead of the standard “Search Box” webpart.



Step 4: Open the configuration settings of the TermSuggester web part

Using the webpart's context-menu users can open the configuration panel that displays a number of general layout settings, as well as some settings specific for the functionality of this web part.

Step 5: Select the termstore from which the webpart receives possible terms

Since the webpart suggests terms from the termstore users must configure from which termstore the webpart will receive possible terms. Restricting the scope even further to particular groups of termsets, and even to subterms of a specific term in a termset can also be defined.

Step 6: Enter the number of maximum results

The value for “max. results” defines how many suggestions should be displayed at most.

Step 7: Select the option “show only used terms”

Oftentimes it is useful to only propose terms in the search box for which documents exist. If the check box “Show only used terms” is ticked the webpart will only propose used terms and not all terms that would match the entered label. This check box is selected by default.

Step 8: Enter the URL-template

In the last configuration field "URL-template" users must enter a URL that will be called once a suggested term is selected or the user presses the enter key. Per default this value is present:

- `/my/_layouts/OSSSearchResults.aspx?k={{ $searchTerm }}`

This is the standard SharePoint search result page for the current site collection. A relative URL will be resolved against the current host and all parameters will be substituted by the actual values.

- `http://sharepoint/my/_layouts/OSSSearchResults.aspx?k={{ $ searchTerm }}`

Since users typically expect to stay on a search result pages when changing the search term we will modify the URL-Template to read

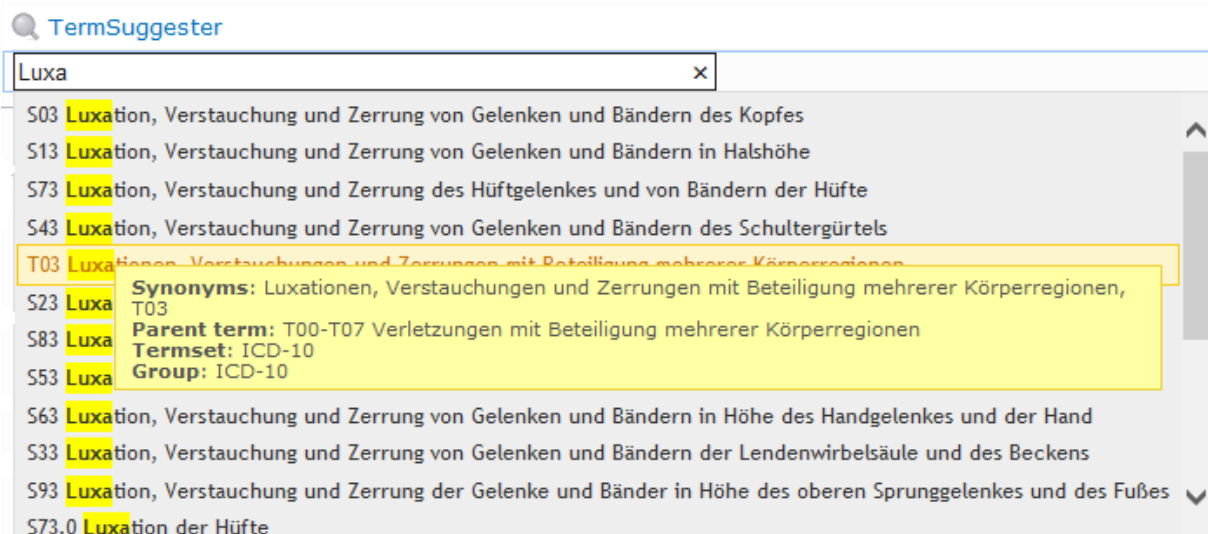
- `/my/BasicSearchCenter/result.aspx?k={{ $ searchTerm }}`

Consult the section 3.8 "URL Template" for more information about the URL template.

3.5.2 Usage

The TermSuggester can be used in the same way as the standard SharePoint SearchBox. Users enter search terms into the text field and when clicking the search button or hitting "enter", a search with these search terms is initiated. When the user stops typing for about one second the added functionality is triggered. The TermSuggester retrieves a list of terms from the termstore, that match the current user input. The webpart finds matches in both, the default label, as well as the alternative labels of terms. Clicking on a term selects it and triggers the query for this term.

When hovering with the mouse over one of the terms from the list of suggestions a tool tip shows all relevant details about this term, e.g. to disambiguate a label that is used by multiple terms.



3.6 MatchingTerms Webpart

The MatchingTerms webpart is very similar to the TermSuggester webpart. It also retrieves terms similar to an entered search term. It uses the same matching algorithm and has the same configuration options. But instead of displaying the matching terms as suggestions while typing, the MatchingTerms webpart displays them as a list of hyperlinks on the search result page.

3.6.1 Configuration for SharePoint 2016 and 2013

Step 1: Pre-requisites

Prepare the following:

1. The configuration guidelines assume that you already have a search center in place. If this is not the case, then you have to create either a basic or enterprise search center.

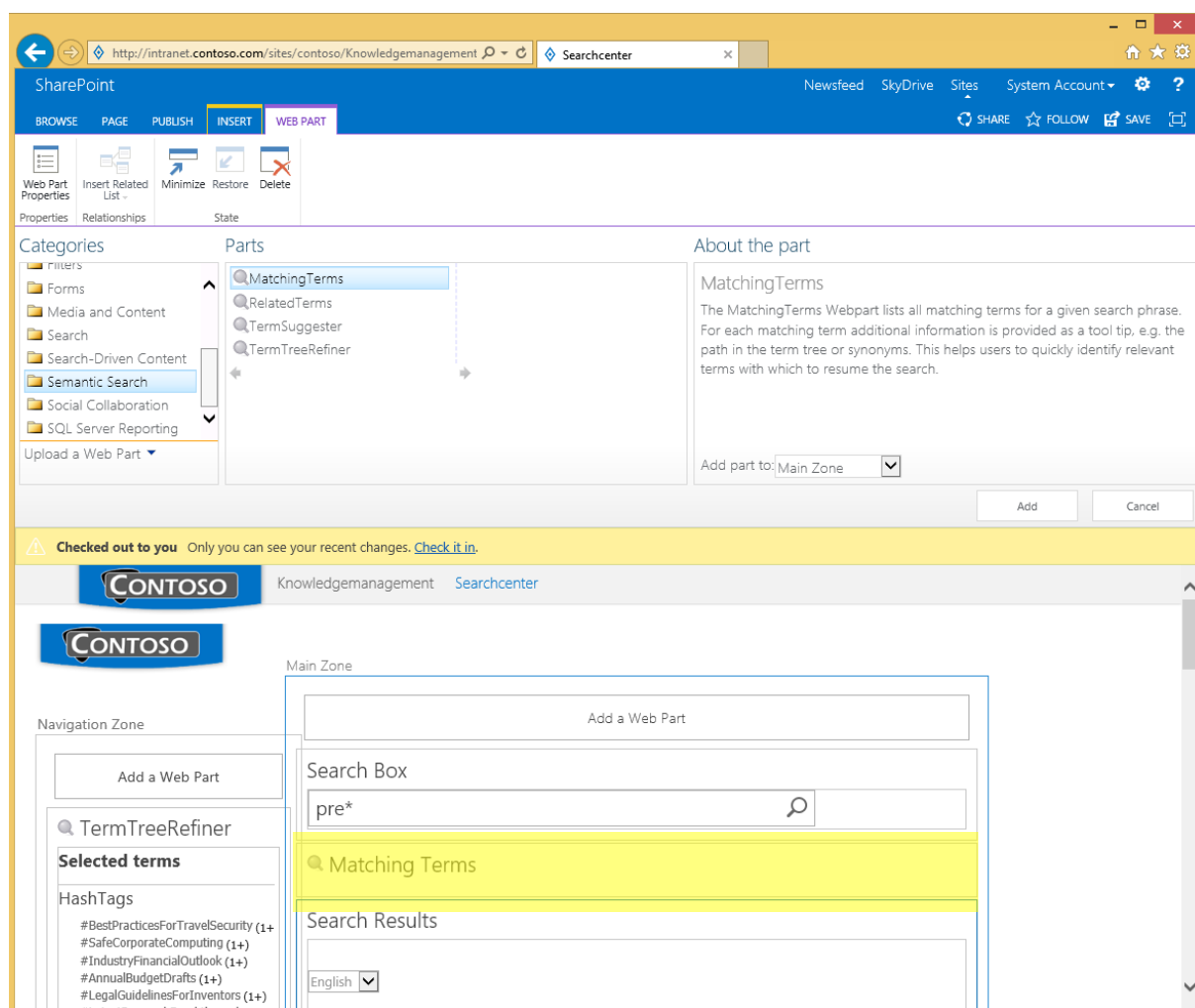
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

Open the site settings of your search center, access the “Site Collection Features” and activate the feature “Semantic Search Web Parts”. This feature is introduced by the “Semantic Search Webparts”-solution and adds this web part (amongst others):

- MatchingTerms Webpart

Step 3: Add the “MatchingTerms” webpart to the search page

We recommend adding the MatchingTerms webpart to the Main Zone underneath the Search Box.



Step 4: Adjust the configuration settings

Using the webpart's context-menu users can open the configuration panel that displays a number of general layout settings, as well as some settings specific for the functionality of this web part.

MatchingTerms

+ Appearance

+ Layout

+ Advanced

MatchingTerms Webpart settings ^

Termstore
Managed Metadata Service

Group
-All-

Termset
-All-

Term

max. results
20

☒ Show only used terms

URL-Template ([Help](#))
/sites/contoso/Knowledgemanag

☐ Show input field

OK Cancel Apply

Since the webpart retrieves matching terms from the taxonomy in the termstore users can define, which termstore to use and can also restrict the group, termsets and even root-nodes to look for matching terms.

The value for “max. results” defines how many matching terms should be listed.

Since clicking on a matching term will trigger a new search it is oftentimes useful to only display terms for which documents exist. If the check box “Show only used terms” is ticked the webpart will only show used terms and not all terms that would match the entered label. This check box is selected by default.

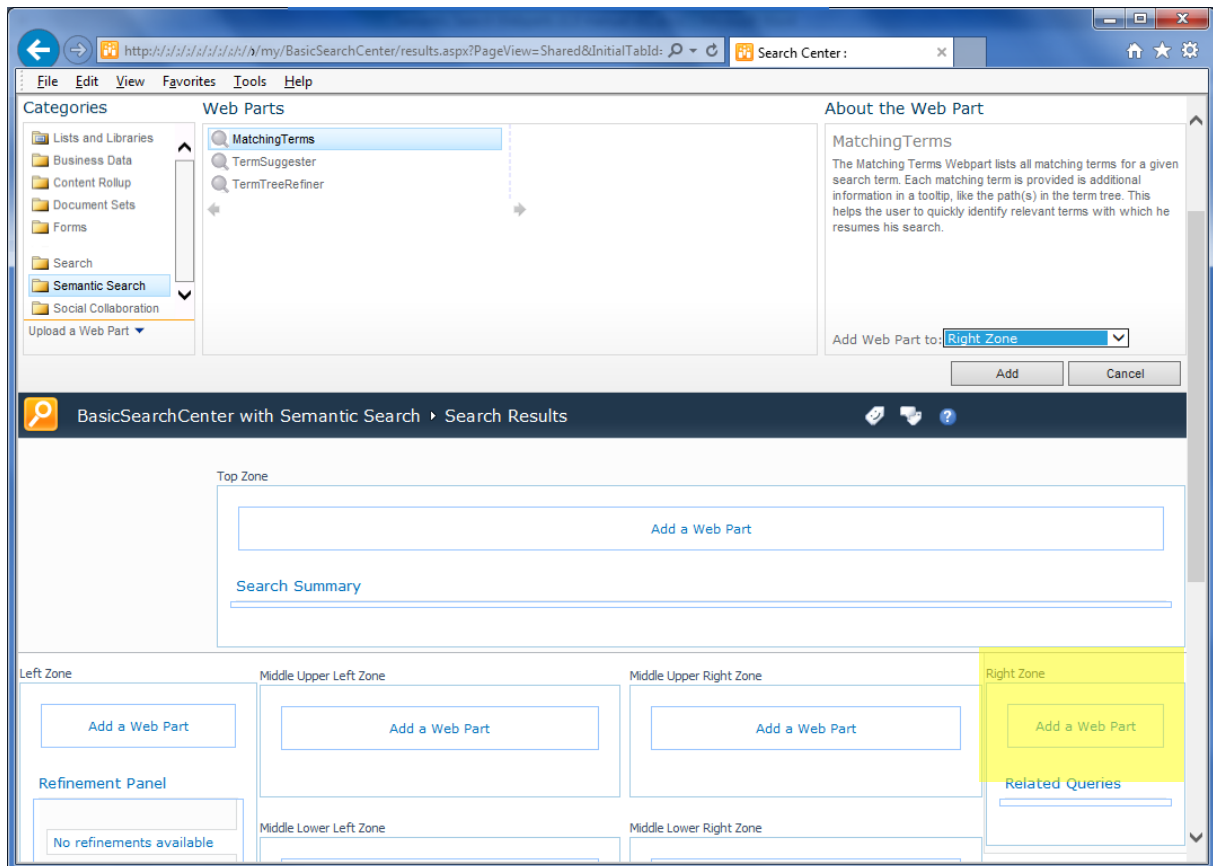
In the configuration field “URL-template” users can enter a URL that will be used for construction the hyperlinks for all matching terms. In order to search for occurrences

of the term in the managed properties, you can change the URL to link to your search center and to contain a KQL-statement:

```
/sites/contoso/Searchcenter/Pages/results.aspx?k=owsmetadatafacetinfo:{{$termLabel}}
```

3.6.2 Configuration for SharePoint 2010

We recommend adding the MatchingTerms webpart at the right of the search result page, into the “Right zone”, on top of “RelatedQueries”.



Using the webpart's context-menu users can open the configuration panel that displays a number of general layout settings, as well as some settings specific for the functionality of this web part.

Since the webpart retrieves matching terms from the taxonomy in the termstore users can define, which termstore to use and can also restrict the group, termsets and even root-nodes to look for matching terms.

The value for “max. results” defines how many matching terms should be listed.

Since clicking on a matching term will trigger a new search it is oftentimes useful to only display terms for which documents exist. If the check box “Show only used terms” is ticked the webpart will only show used terms and not all terms that would match the entered label. This check box is selected by default.

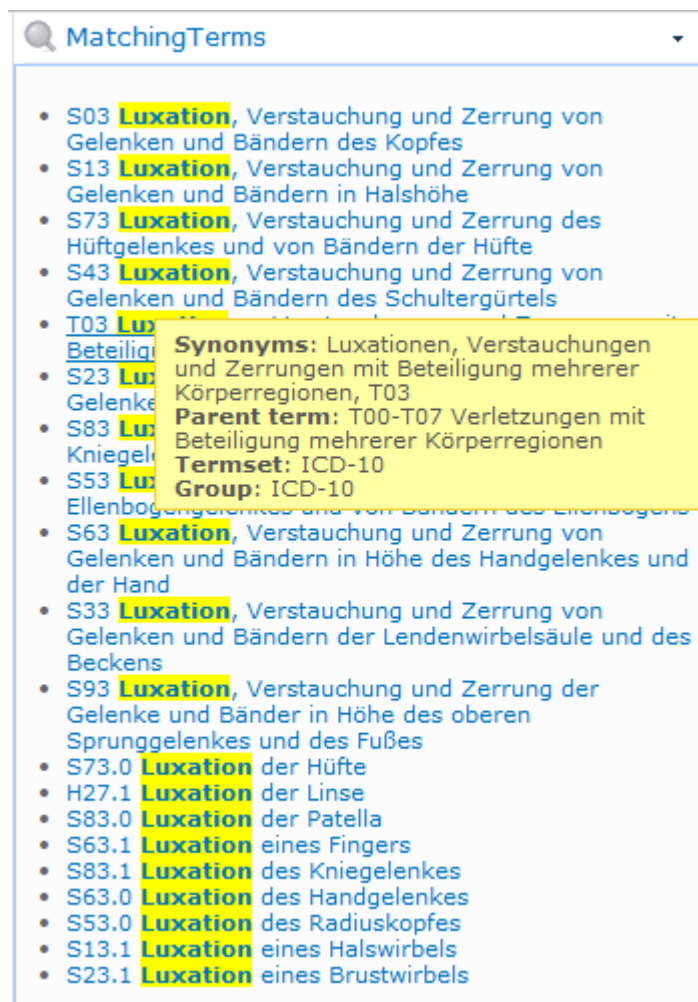
In the last configuration field “URL-template” users can enter a URL that will be used for construction the hyperlinks for all matching terms. Per default this value is present:

- `/my/_layouts/OSSSearchResults.aspx?k={{$termLabel}}`

This is the standard SharePoint search result page for the current site collection. As for the TermSuggester webpart relative URLs are allowed and the webpart will interpret a number of parameters (cf. Section 3.8 for details).

3.6.3 Usage

Using the MatchingTerms webpart is fairly simple. It displays a list of terms and offers the same tool tips as the TermSuggester. Clicking on a term opens the associated URL, i.e. triggers another search.



The screenshot shows a webpart titled "MatchingTerms" with a search icon. It displays a list of medical terms, each preceded by a bullet point. The terms are: S03 Luxation, S13 Luxation, S73 Luxation, S43 Luxation, T03 Luxation, S23 Luxation, S83 Luxation, S53 Luxation, S63 Luxation, S33 Luxation, S93 Luxation, S73.0 Luxation, H27.1 Luxation, S83.0 Luxation, S63.1 Luxation, S83.1 Luxation, S63.0 Luxation, S53.0 Luxation, S13.1 Luxation, and S23.1 Luxation. A tooltip is visible over the "T03 Luxation" entry, providing additional information: "Synonyms: Luxationen, Verstauchungen und Zerrungen mit Beteiligung mehrerer Körperregionen, T03", "Parent term: T00-T07 Verletzungen mit Beteiligung mehrerer Körperregionen", "Termset: ICD-10", and "Group: ICD-10".

- S03 **Luxation**, Verstauchung und Zerrung von Gelenken und Bändern des Kopfes
- S13 **Luxation**, Verstauchung und Zerrung von Gelenken und Bändern in Halshöhe
- S73 **Luxation**, Verstauchung und Zerrung des Hüftgelenkes und von Bändern der Hüfte
- S43 **Luxation**, Verstauchung und Zerrung von Gelenken und Bändern des Schultergürtels
- T03 **Luxation**, Verstauchung und Zerrung mit Beteiligung mehrerer Körperregionen, T03
- S23 **Luxation**, Verstauchung und Zerrung von Gelenken und Bändern der Brustwirbelsäule
- S83 **Luxation**, Verstauchung und Zerrung von Kniegelenken und Bändern des Kniegelenkes
- S53 **Luxation**, Verstauchung und Zerrung von Ellenbogengelenken und von Bändern des Ellenbogengelenkes
- S63 **Luxation**, Verstauchung und Zerrung von Gelenken und Bändern in Höhe des Handgelenkes und der Hand
- S33 **Luxation**, Verstauchung und Zerrung von Gelenken und Bändern der Lendenwirbelsäule und des Beckens
- S93 **Luxation**, Verstauchung und Zerrung der Gelenke und Bänder in Höhe des oberen Sprunggelenkes und des Fußes
- S73.0 **Luxation** der Hüfte
- H27.1 **Luxation** der Linse
- S83.0 **Luxation** der Patella
- S63.1 **Luxation** eines Fingers
- S83.1 **Luxation** des Kniegelenkes
- S63.0 **Luxation** des Handgelenkes
- S53.0 **Luxation** des Radiuskopfes
- S13.1 **Luxation** eines Halswirbels
- S23.1 **Luxation** eines Brustwirbels

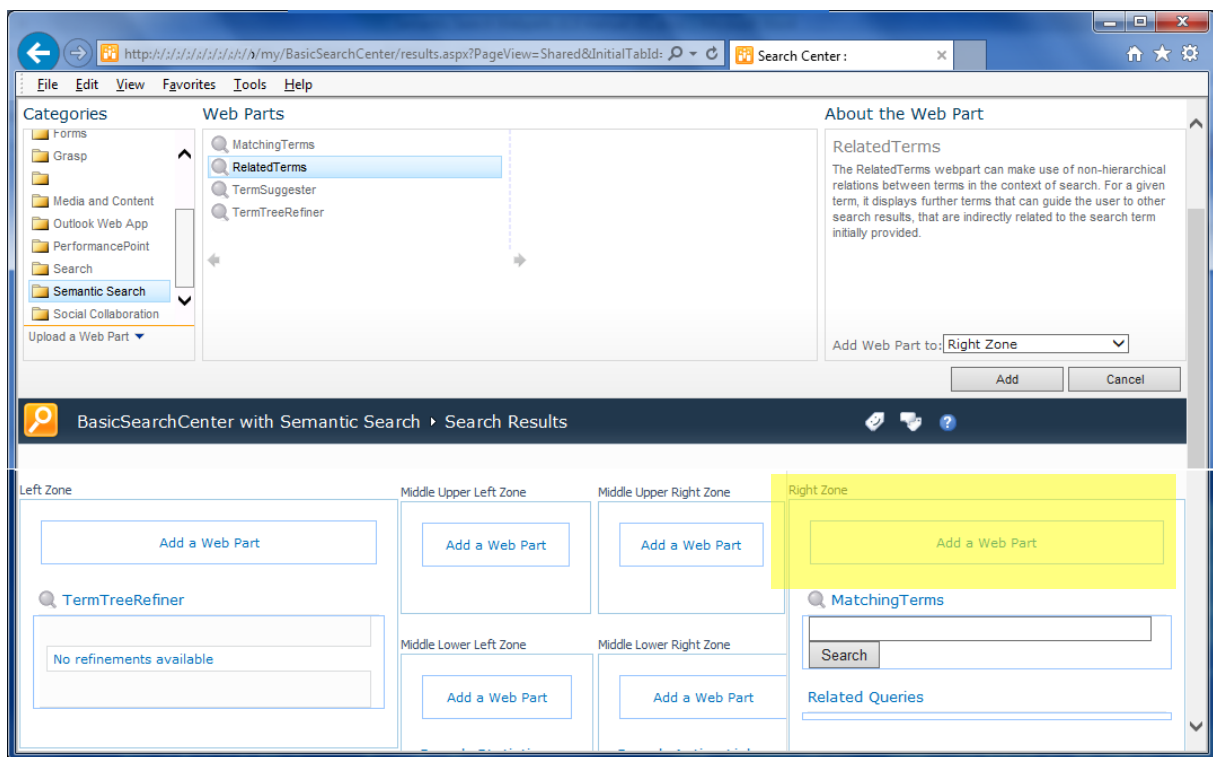
Synonyms: Luxationen, Verstauchungen und Zerrungen mit Beteiligung mehrerer Körperregionen, T03
Parent term: T00-T07 Verletzungen mit Beteiligung mehrerer Körperregionen
Termset: ICD-10
Group: ICD-10

3.7 RelatedTerms Webpart

The RelatedTerms webpart will list terms that might help users to find closely related documents, i.e. documents that are not tagged with a given term but that are tagged with terms related to it. The “given term” is either a term entered in the TermSuggester or any term used to tag any of the initial search results. In this way users can research the vicinity of their initial search space.

3.7.1 Configuration

We recommend adding the RelatedTerms webpart to the right hand side of the search result page, into the “Right zone”, on top of “RelatedQueries”. It can be placed on top of or below the MatchingTerms webpart, if both are present.



After the webpart has been placed on the page, its parameters can be configured. Using the webpart's context-menu users can open the configuration panel. Besides sections for general layout settings it also contains a section with settings specific for the functionality of this web part.

RelatedTerms

+ Appearance

+ Layout

+ Advanced

RelatedTerms Webpart settings

Termstore
Managed Metadata Service

Group
-All-

Termset
-All-

Term

max. results
20

URL-Template (Help)
/my/_layouts/OSSSearchResults.a

OK Cancel Apply

Since the webpart retrieves the information about related terms from the termstore users can define, which termstore to use to retrieve them. Additionally, the search for related terms can be restricted to individual groups, termsets and even root-nodes.

The value for “max. results” defines how many related terms should be listed.

In the last configuration field “URL-template” users can enter a URL that will be used for constructing the hyperlinks for the found terms. Per default this value is present:

- /my/_layouts/OSSSearchResults.aspx?k={{ \$termLabel }}

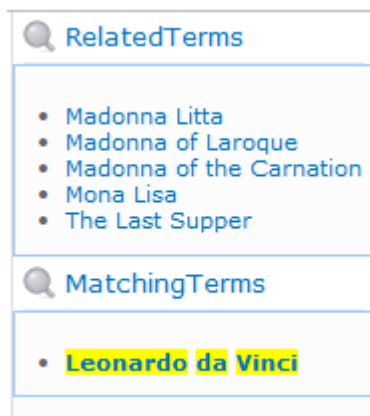
This is the standard SharePoint search result page for the current site collection. As for the other webparts relative URLs are allowed and the webpart will interpret a number of parameters (cf. Section 3.8 for details).

It is not unreasonable to also choose the current URL of the Basic Search Center result page as the target for the links that are created for the matching terms, i.e. we will modify the URL-Template to read

- /my/BasicSearchCenter/result.aspx?k={{ \$termLabel }}

3.7.2 Usage

Using the RelatedTerms webpart is fairly easy, once a SharePoint administrator has properly configured it. On a search result page it displays a list of terms that are related to an entered search term. Also it checks for the terms that are used to tag the result documents, and displays terms related to them.



Like the other Semantic Search web parts it also offers informative tool tips for each listed term. Clicking on a term opens the associated URL, i.e. triggers another search, with that term as its focus.

3.8 URL Template

3.8.1 SharePoint 2016 and 2013

The TermSuggester and MatchingTerm Webparts provide a configuration for defining the target URL of a search. While entering the URLs users can insert variable parts that are determined by the selected terms. The variables follow the following syntax: `{{$variable}}`, where variable can be one of four alternatives:

- **searchTerm:** This variable is only relevant for TermSuggester. It represents the text entered in the search box. If a *term* has been selected this is identical to the default label of the term

All webparts check the **k**-paramter of the query-string of the page URL, when the page loads to determine the base-terms for their algorithms, e.g. for finding matching terms. A typical URL looks like this

- `http://sharepoint/my/BasicSearchCenter/results.aspx?k=Leonardo%20da%20Vinci`

3.8.2 SharePoint 2010

The TermSuggester and MatchingTerm Webparts provide a configuration for defining the target URL of a search. While entering the URLs users can insert variable parts that are determined by the selected terms. The variables follow the following syntax: `{{$variable}}`, where variable can be one of four alternatives:

- **searchTerm:** This variable is only relevant for TermSuggester. It represents the text entered in the search box. If a *term* has been selected this is identical to the default label of the term
- **termLabel:** This variable represents the default label of the selected term.
- **termGUID:** This variable represents the GUID of the selected term from the term store.
- **termURI:** This variable represents the URI of the selected term, as it is stored in the term store. Since SharePoint does not support URIs for terms out-of-the-box, this feature is only available for taxonomies that have been imported with GRASP.

All webparts check the **k**-paramter of the query-string of the page URL, when the page loads to determine the base-terms for their algorithms, e.g. for finding matching terms. A typical URL looks like this

- `http://sharepoint/my/BasicSearchCenter/results.aspx?k=Leonardo%20da%20Vinci`

The MatchingTerms and RelatedTerms webparts additionally check the URL's query string for a parameter with the name **termID** and assume that the GUID of an actual term is provided in this parameter. In the URL field of the webparts you might want to pass the term GUID as a **termID** parameter, e.g.:

- /my/BasicSearchCenter/results.aspx?k={{\$termLabel}}&**termID**={{\$termGUID}}

In this way they can unambiguously identify a term from the term store and act appropriately, e.g. only show matching terms for this single term, not for other terms that might have the same default label.

4 Technical Support

4.1 Download new releases of Semantic Search Webparts

You find new releases of the Semantic Search Webparts on the DIQA homepage at

http://diqa-pm.com/en/Semantic_Search_Webparts

4.2 Support inquiries

If you have issues with the software then please contact this email address: info@diqa-pm.de.

4.3 Check current bug-status

<http://bugs.diqa-pm.com/index.php>

4.4 Buying a license

The evaluation version of the Semantic Search Webparts is fully functional for 30 days. If you want to continue to use the Semantic Search Webparts after this period has elapsed you must buy a valid license key from DIQA at: info@diqa-pm.de