

USER MANUAL

SEMANTIC SEARCH

Webparts for SharePoint™

Version 2.1



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2.0.5	29.06.2018	DH	• Included the new webpart “QueryTermPicker”
2.1.0	08.10.2018	DH	• Included new query variables, logical operators for multiple term selections (and, or), “hide apply button”-option

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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 terminologies 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.

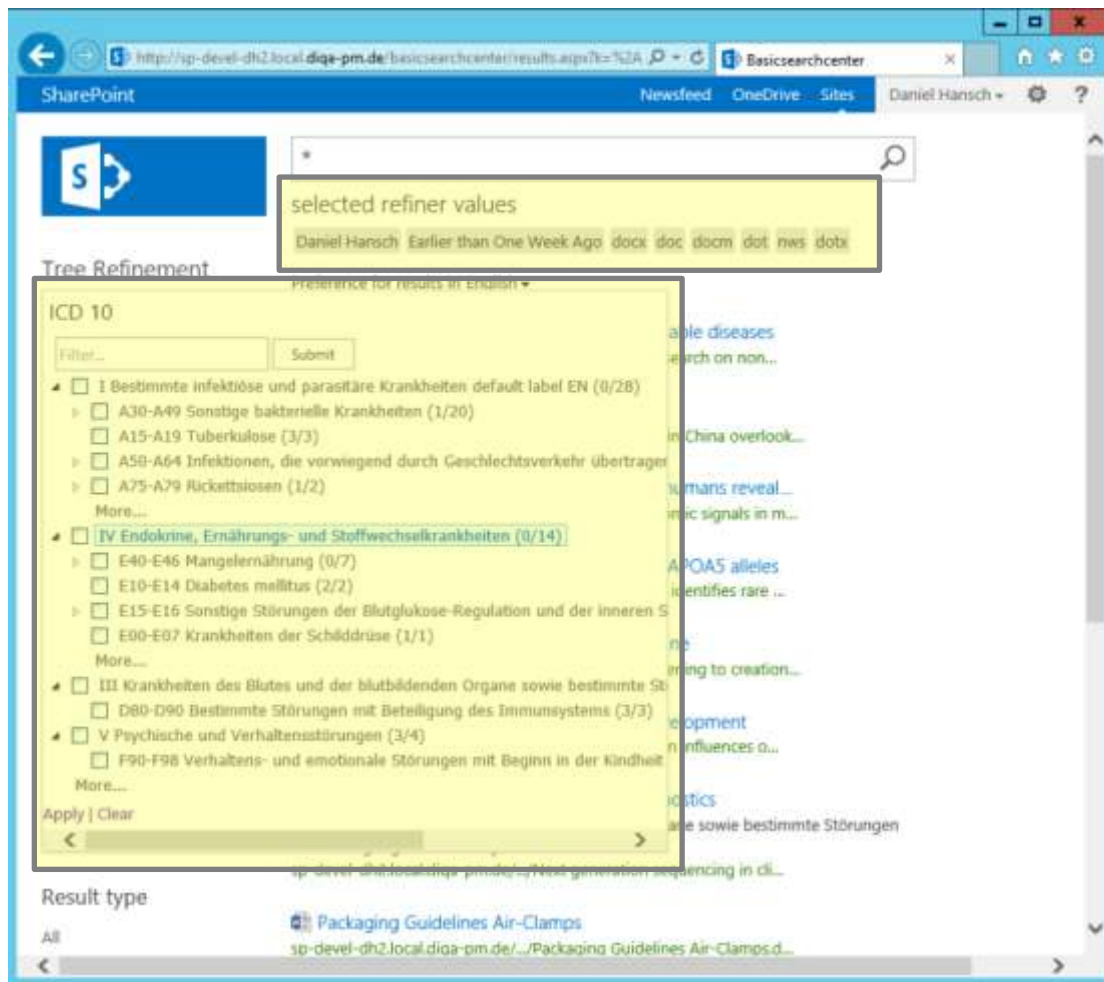
Note:

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

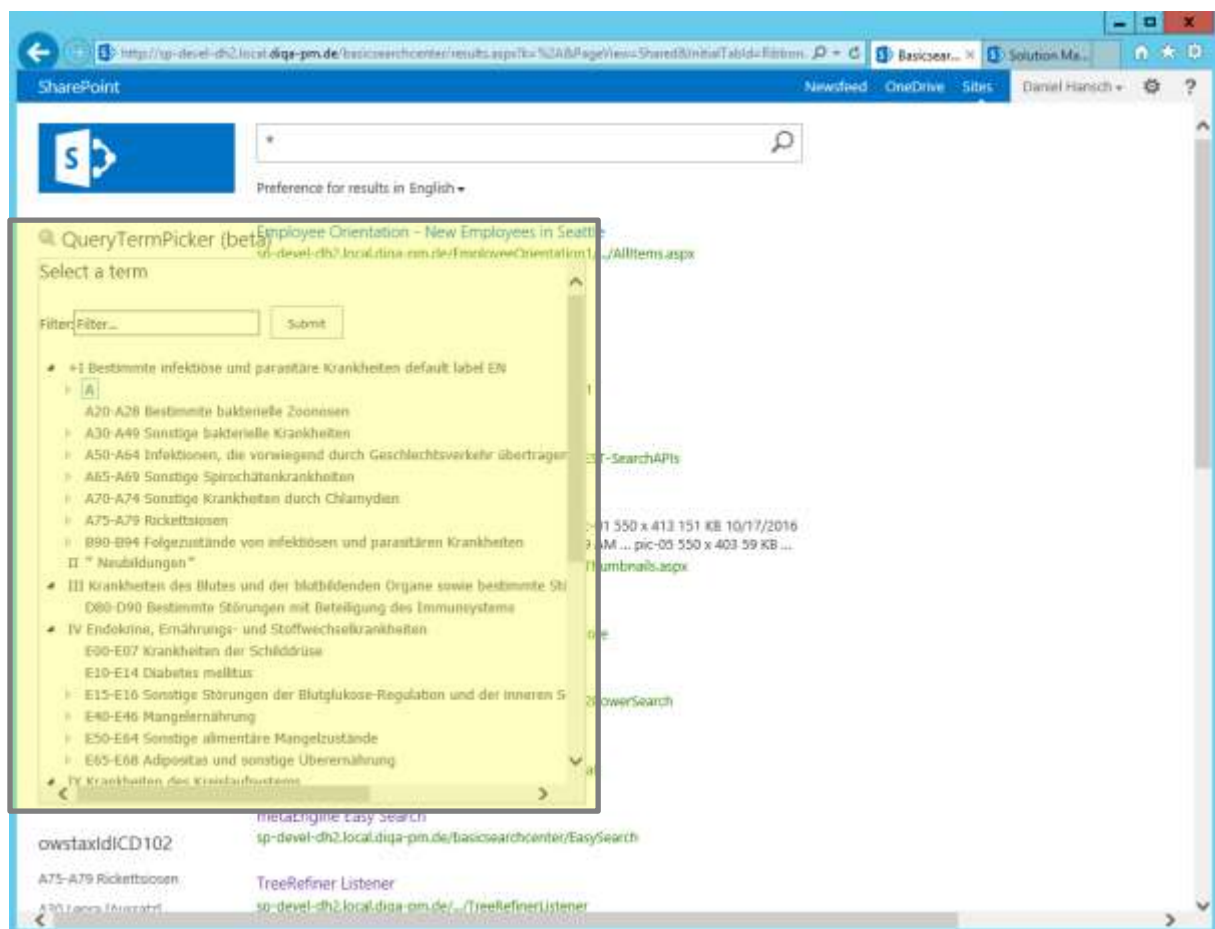
<http://bugs.diqa-pm.com>

1.1 Product Overview

The Semantic Search Webparts comprise the **TreeRefiner Webpart** and the **QueryFacets Webpart** for SharePoint 2016 and 2013 (in yellow boxes, ref. screenshot):



Additionally the Semantic Search Webparts contain the **QueryTermPicker Webpart**:



1.2 What's New?

1.2.1 Version 2.1

New Features in v2.1:

- The query text supports the new query variable: {Term}
- New configuration option: multiple selections of terms can be combined with "and" or "or".
- New configuration option "hide apply button": when activated then user selection apply immediately.

1.2.2 Version 2.0

New Features in v2.0:

- First release of 2.0

Bugfixes in Semantic Search Webparts build 6:

- n/a

2 Administration Guide

2.1 Software prerequisites

 Semantic Search Webparts requires **SharePoint Server 2013** or **SharePoint Server 2016**.

Client PC Requirements:

1. Windows 8 or later
2. Microsoft Internet Explorer 11 or later

2.2 Installation

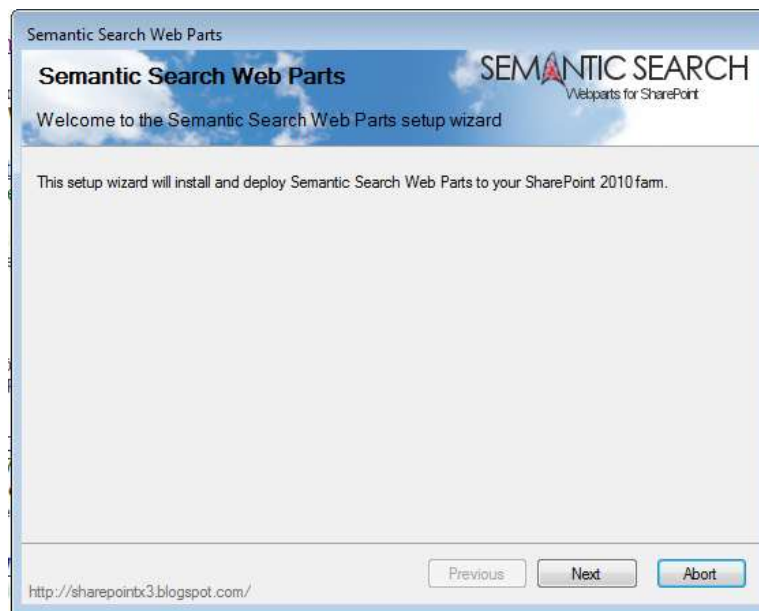
In order to provide your SharePoint users with the features of Semantic Search Webparts execute the following steps:

1. Ensure that you have an account with administration privileges on your SharePoint server.
2. Open the following URL in your browser and request your copy: http://diqa-pm.com/en/Semantic_Search_Webparts.
3. You will receive an email that contains a link to the download area. Open the download area and select either the 2016 or 2013 folder, since both versions are kept separate.
4. Download the latest version of the installation file (*.exe) and store the *.exe file as a local file on your SharePoint server.

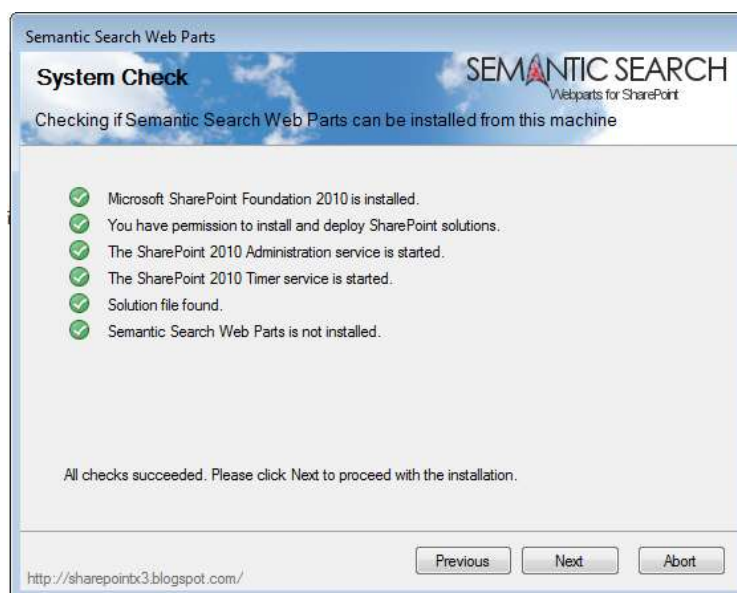
Note:

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

5. 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:



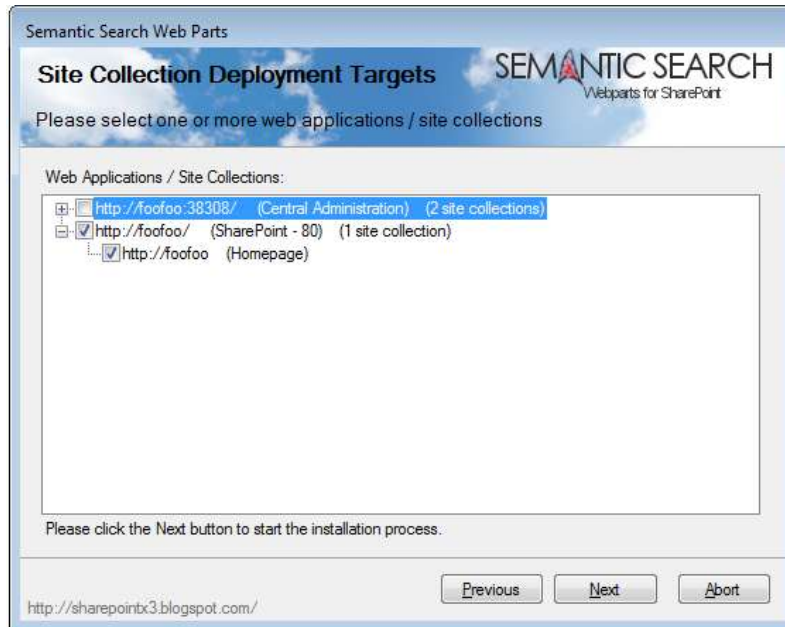
6. Click on next to perform the system check that should indicate that the Semantic Search Webparts can be installed:



7. 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.

8. 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:



9. 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.

10. Click on next to get the list of all SharePoint sites in which the webparts have been deployed.
11. Click on the "close"-button to close the Installation Wizard.

12. 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 a feature that is activated by default:
- "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
	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 "SemanticSearch 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” comprises these webparts:

- “Semantic Search Webparts”-feature
 - TreeRefiner Webpart
 - QueryFacets-Webpart

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 TreeRefiner Webpart

The TreeRefiner 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 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.
2. You have a **managed property** in place (e.g. named “owstaxidsitecolumn” in the context of this guideline) that is refineable.
3. The managed property represents a **site column** (e.g. named “SiteColumn” in the context of this guideline) of type “Managed Metadata” that uses a particular **term set**.
4. You have documents that contain values (“**tags**”) for the site column.

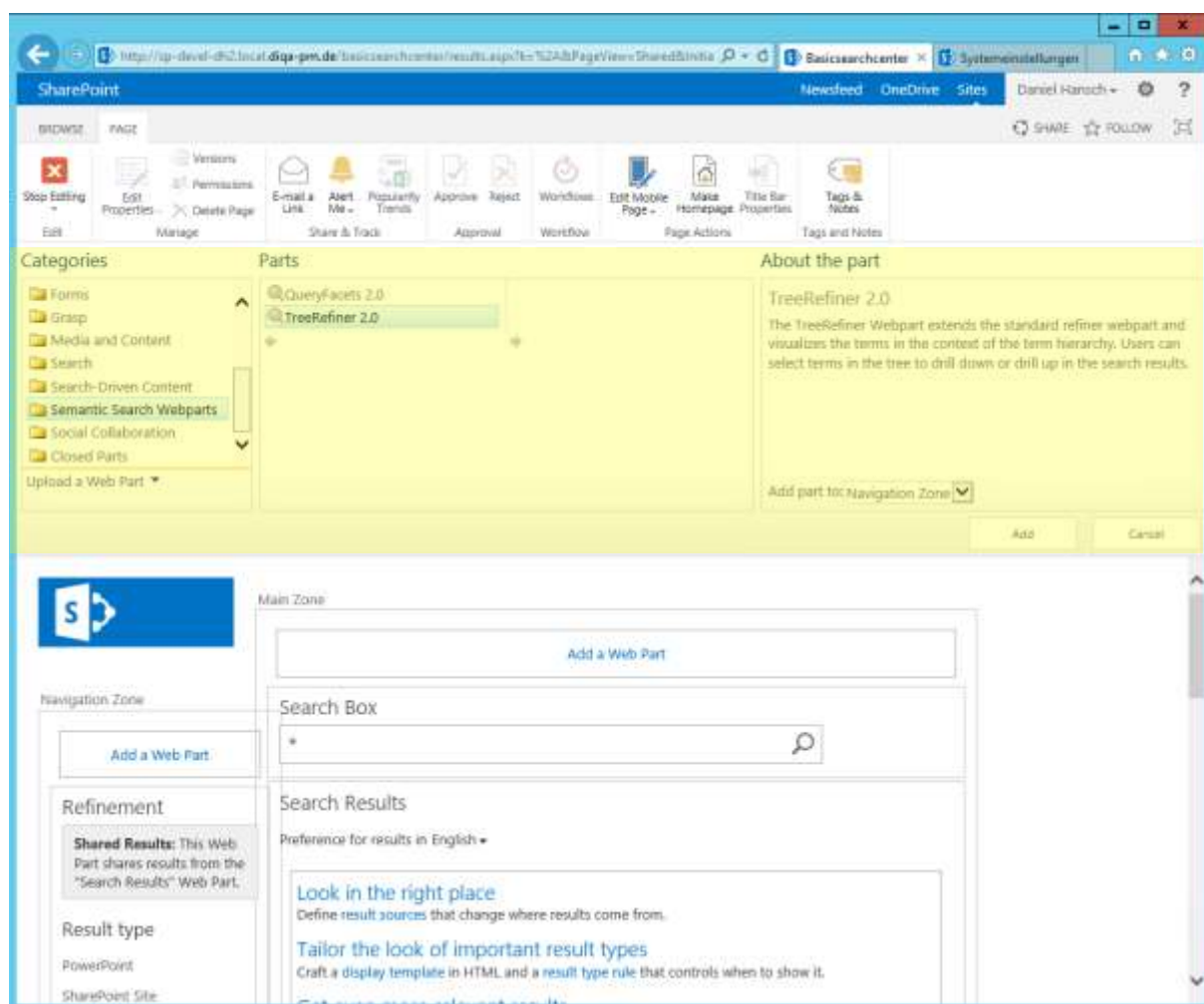
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

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):

- TreeRefiner Webpart

Step 3: Add the TreeRefiner to the search results page

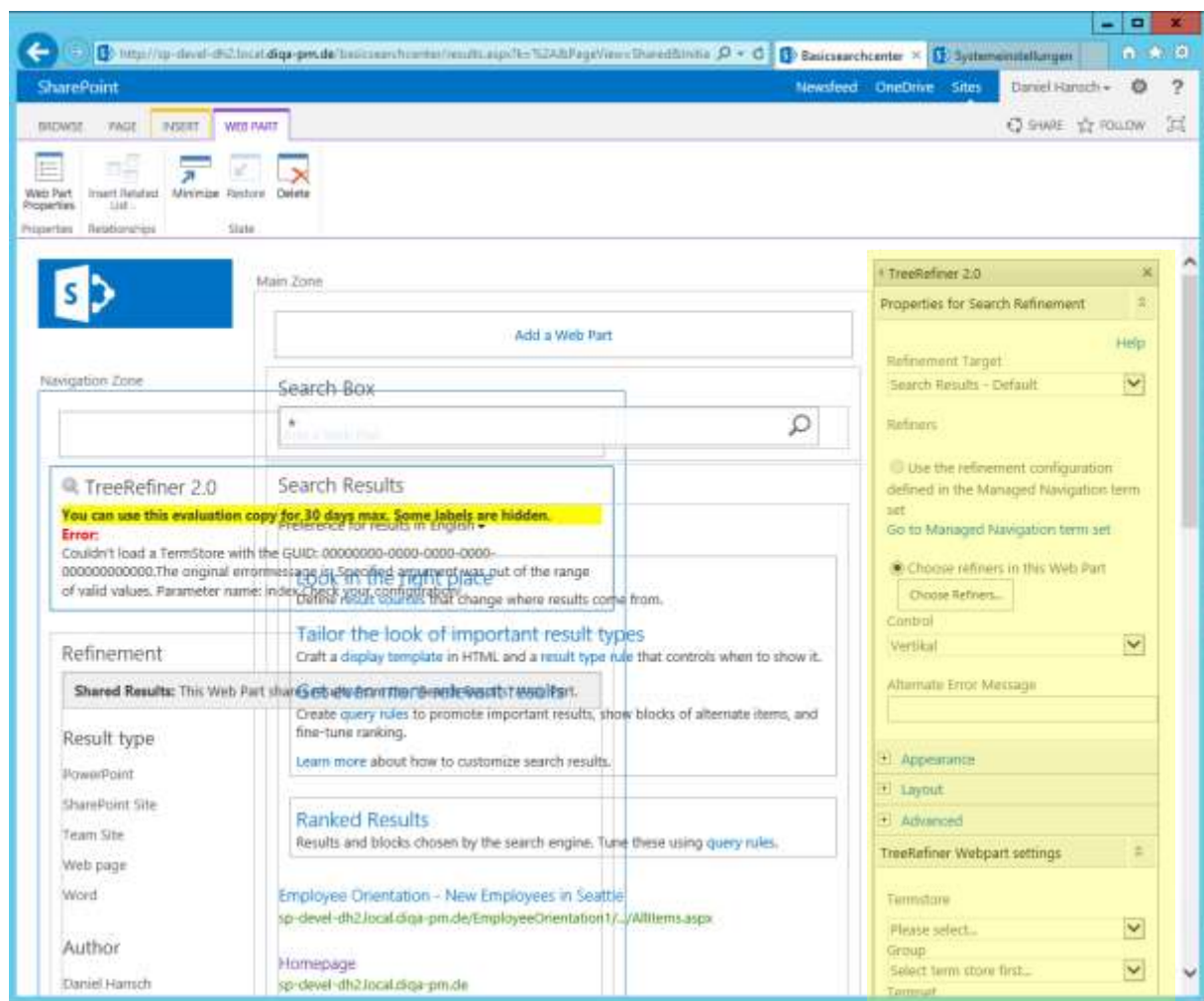
We recommend to add the TreeRefiner on top of the original “Refiner” web part.



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 TreeRefiner 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 "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.

The screenshot shows the configuration interface for the TermTreeRefiner web part. The title bar reads "TermTreeRefiner". Below it is a tab labeled "Properties for Search Refinement". A "Help" link is visible in the top right. The "Refinement Target" is set to "Search Results - Default" via a dropdown menu. Under the "Refiners" section, the radio button "Choose refiners in this Web Part" is selected, with a "Choose Refiners..." button below it. The "Control" is set to "Vertical" via a dropdown menu. There is an empty text box for the "Alternate Error Message". At the bottom, there are expandable sections for "Appearance", "Layout", and "Advanced", each with a plus icon.

Note:

You can place multiple search results webparts into your searchpage; the TreeRefiner will reflect the search hits from the selected search results webpart, only.

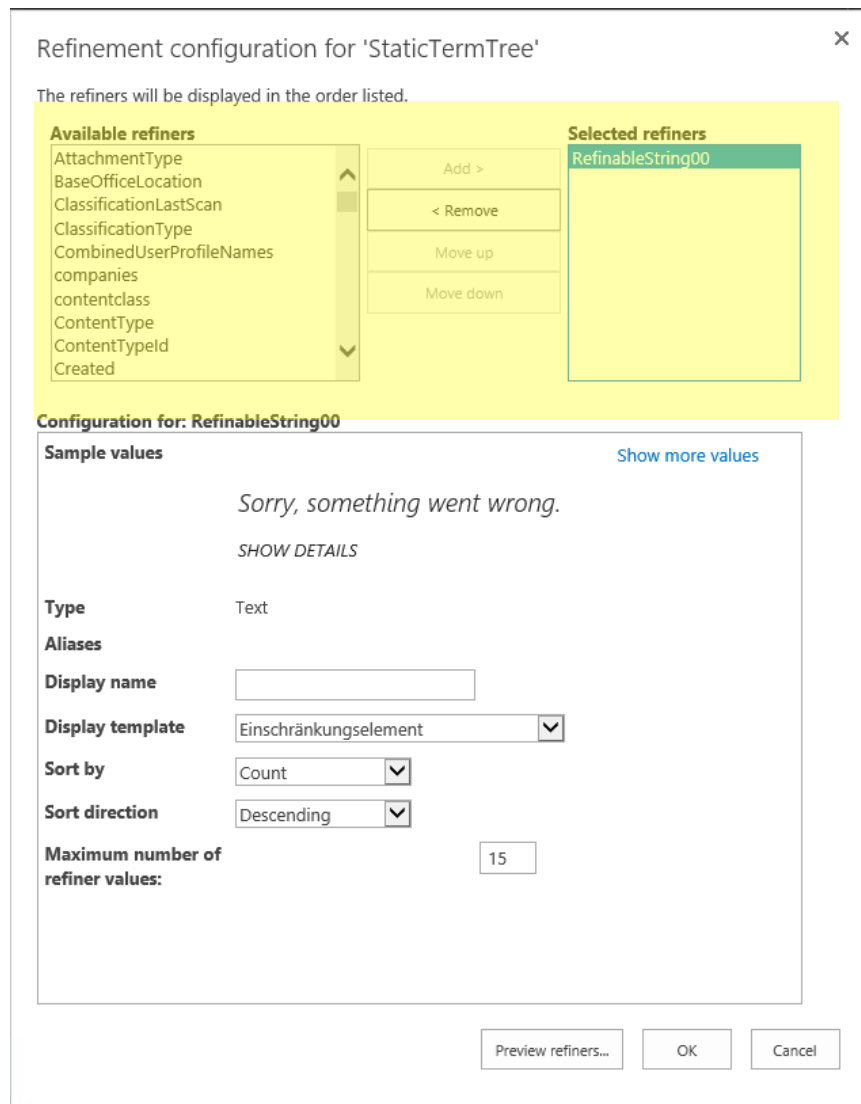
Step 6: Select the refiner

Refiners are the facets that are displayed in the TreeRefiner. 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") from a particular term set.

Click on “Choose refiners” to open a popup.

Remove **all** managed properties from “selected refiners”.

Select a SINGLE refinable managed metadata property, whose property name either starts with “owstaxId...” or “RefinableString...”!



The dialog box is titled "Refinement configuration for 'StaticTermTree'". It contains a section "The refiners will be displayed in the order listed." with two panes: "Available refiners" and "Selected refiners". The "Available refiners" pane lists properties: AttachmentType, BaseOfficeLocation, ClassificationLastScan, ClassificationType, CombinedUserProfileNames, companies, contentclass, ContentType, ContentTypeId, and Created. The "Selected refiners" pane shows "RefinableString00". Between the panes are buttons: "Add >", "< Remove", "Move up", and "Move down". Below the panes is a section "Configuration for: RefinableString00" with a "Sample values" area showing an error message "Sorry, something went wrong." and a "SHOW DETAILS" link. The configuration section includes fields for "Type" (Text), "Aliases", "Display name", "Display template" (Einschränkungselement), "Sort by" (Count), "Sort direction" (Descending), and "Maximum number of refiner values" (15). At the bottom are buttons for "Preview refiners...", "OK", and "Cancel".

We recommend that you select a predefined refinable managed metadata property, like “RefinableString00” and create a schema mapping from your crawled property onto it.

Troubleshooting Note:

The list of refiners comprises managed properties that are managed metadata properties and other managed properties.

Please make sure that you only pick those properties that comply to these criteria:

1. The property must be a refinable managed metadata property!
2. The property name must be either start with "owstaxId..." or "RefinableString..."!
3. The selected properties must point to the SAME term set!

If your selection does not comply to these criteria, then the TreeRefiner will remain empty!

Note:

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

Step 7: Configure the refiner

Provide the refiner with a **display name** (or just enter a blank to avoid printing out a display name).

Specify the appropriate **display template**:

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

Select an option for "**Sort by**":

- Count: sorts all refiner values according to the number of search hits
- Name: sorts all refiner values alphabetically
- Number: ignored.

Enter a value for the "**Maximum number of refiner values**":

- This number determines, how many refiner values are printed on each tree level before a "More"-tree node is printed.

Close the Refinement Configuration by clicking on OK.

Step 8: Open the “Appearance” section of the webpart configuration

Open the “Appearance” section to adjust the tree appearance.

Provide the **title** of the TreeRefiner webpart (or just enter a blank to avoid printing out a display name).

Specify if the webpart should have a **fixed height**.

Specify if the webpart should have a **fixed width**.

Chrome State and Chrome Type are ignored.

Step 8: Open the “TreeRefiner Webpart settings” section of the webpart configuration

Open the “TreeRefiner Webpart settings” to adjust the rest of the TreeRefiner configuration.

TreeRefiner Webpart settings

Termstore

Please select...

Group

Select term store first...

Termset

Select term group first...

Result Source

Please select...

Query text

{searchboxquery}

Enable query rules

Trim duplicates

Static tree

Expand this tree level

2

Template for titles

{label} ({directhits}+{subhits}={totalhits})

Prefix of the tree

treerefiner-id-

Mouse over expands the WebPart

Maximum width

500

Maximum height

500

Show tree filter

6.1 Select a termset

Select 1) the **termstore**, 2) the **termgroup** and 3) the **termset** that is used by your refinable metadata managed property.

Troubleshooting Note:

Please make sure that you only pick the term set that is used by the refinable managed metadata property that you have selected as a refiner!

If you select a different term set, then the TreeRefiner will remain empty!

6.2 Select the result source.

Which Result Source to choose?

You should select the Result Source that you have picked in the Search Results Webpart on your search page.

A typical result source is "Local SharePoint Results".

If you select a different result source from your selection in the Search Results Webpart, then the TreeRefiner will remain empty or show unexpected results!

Troubleshooting Note:

The result source "local people search" does not return results for the tree refiner.

You cannot use this result source.

6.3 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 TreeRefiner setting. The string must be identical in both webparts in order to avoid that the number of search hits differ in the TreeRefiner and the search results webpart.

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

Troubleshooting note:

The “Query Text”/ “Abfragetext” supports SOME Query Variables! If your search result webpart uses query variables then replace them with concrete values. Otherwise the search results will differ amongst both webparts.

These expressions are supported in the querytext:

1. Property expressions { | managedproperty:variableexpression}

Example: { | property1:{User.Name}} is translated into property1:“Daniel Hansch”

Note:

1. Property expressions that contain Invalid variable expressions are deleted from the query text.
2. If a variable expression returns no value then the property expression is deleted from the query text.
3. If a variable expression returns more than 1 value then only the first value is used, and the rest is ignored.
2. Variable expressions {class.attribute} and “{\class.attribute}

Example 1: {User.PreferredName} is translated into “Daniel Hansch”

Example 1: {\User.PreferredName} is translated into Daniel Hansch (quotes are suppressed)

Supported classes and attributes:

- {Site.URL}
- {Site.ID}
- {Site.LCID}
- {Site.locale}
- {Site.customattribute} with “customattribute” being a custom attribute of the current site.
- {SiteCollection.URL}
- {SiteCollection.ID}
- {SiteCollection.LCID}||o
- {SiteCollection.locale}
- {Term.ID}
- {Term.IDNoChildren}
- {Term.IDWithChildren}
- {Term.Name}
- {TermSet.ID}

Other classes or attributes are NOT supported and removed from the querytext.

6.4 Select or de-select “Enable query rules”

The selection must correspond with the setting in the search results webpart.

6.5 Select or de-select “Trim duplicates”

The selection must correspond with the setting in the search results webpart.

6.4 Select or de-select “Static tree”

This selection determines the contents and behavior of the tree:

1. Static tree is OFF:
 - a. Tree contents: the tree displays only terms that are present in current search results, other terms of the term set are NOT displayed.
 - b. Tree behavior: the tree is reset if the user submits a new search.
2. Static tree is ON:
 - a. Tree contents: the tree displays ALL terms of the term set.
 - b. Tree behavior: the selected refiner values if kept unchanged if the user submits a new search.

6.5 Expand this tree level

Select a number to specify how many levels of the tree are initially displayed after the tree has been loaded.

6.6 Template for titles

Enter the template for node labels in the field “Template for titles”. The template accepts strings that can be combined with these magic words:

{label}	Label of the term
{directhits}	The number of search hits that contain this term.
{subhits}	The number of search hits that contain sub-terms of this term.
{totalhits}	The number of search hits that contain this term and sub-terms of this term.

6.7 Prefix of the tree

This string is pre-pended to all html elements in the tree; you can use this in order identify the tree in your css-rules.

6.8 Mouse over expands the webpart

If you select this option then the webpart expands if the user enters it with his mouse pointer. This is helpful for bigger trees.

6.9 Maximum width/maximum height

Enter here a value that specifies the maximal size of the expanded webpart (in pixels). Don't enter a "px" or "pixel" etc!

6.10 Show tree filter

Select this option to provide your users with a text entry box to filter the tree.

6.11 Hide the "Apply"-button

If the tree allows for multiple selections then the user's selections are applied by default as soon as he clicks on the "Apply" link.

By activating this option, the apply link is hidden and user selections apply immediately.

6.12 Logical operator for multiple term selections

If the tree allows for multiple selections then the selected terms can be logically connected either with the "or"- or the "and"-operator.

Or:

If you select "or" then documents must **contain any of** the selected terms (or subterms).

And:

If you select "and" then documents must **contain all of** the selected terms (or subterms).

6.13 License key

Enter here the license key that you have obtained from DIQA.

If you don't enter a license key then you can evaluate the webpart for 30 days.

Step 7: Save the configuration settings and save the search-page.

Save the page.

Step 8: OPTIONAL: Create a schema mapping to your refinable managed property RefinableString00

If you use a built-in refinable managed property `RefinableString00` (or `01` etc) then you have to create a mapping from your crawled property onto it.

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 (e.g. “`RefinableString00`”) into the filter and apply the filter to retrieve it in the list of refinable managed properties for strings.

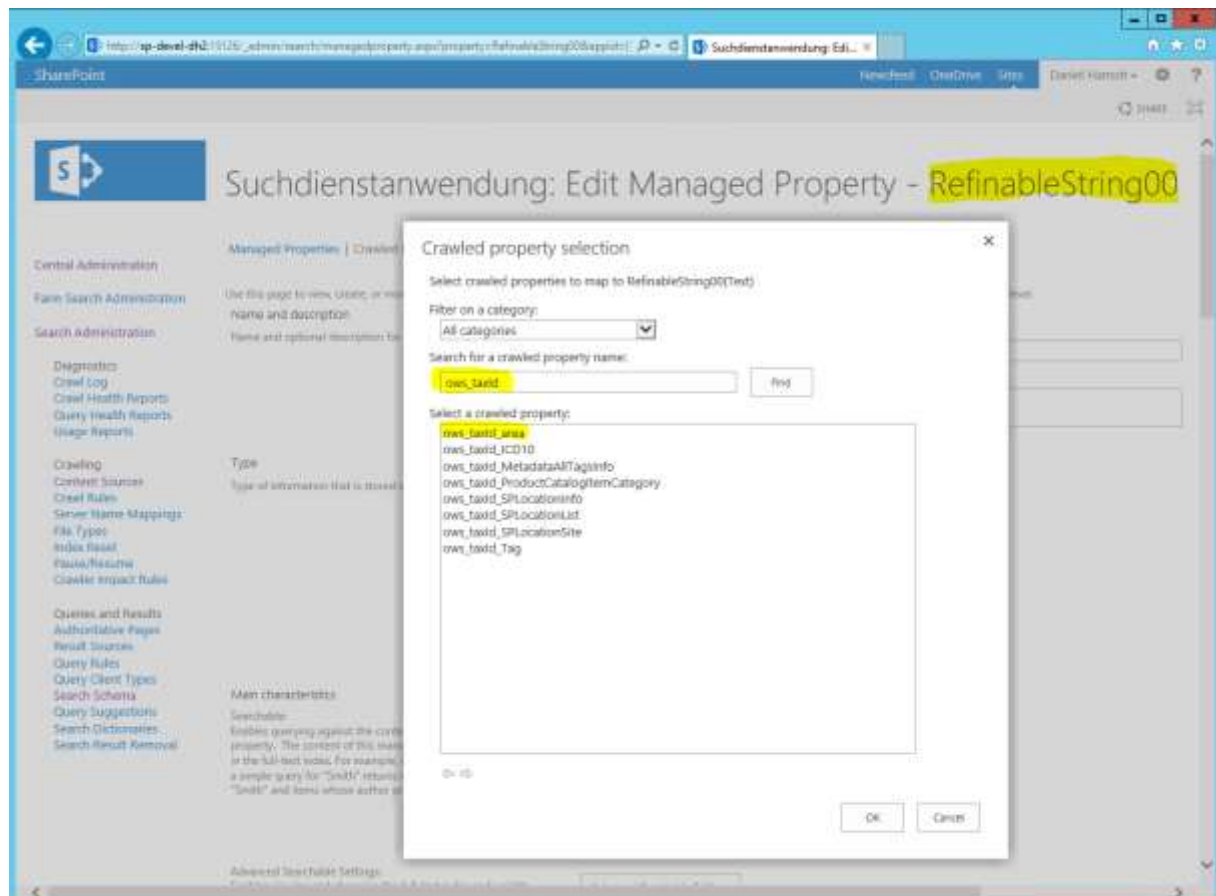
The screenshot shows the SharePoint 'Suchdiensteanwendung: Managed Properties' page. The left navigation pane includes 'Central Administration', 'Farm Search Administration', and 'Search Administration'. Under 'Search Administration', 'Search Schema' is highlighted with a red bracket. The main content area shows 'Managed Properties' with a filter input field containing 'RefinableString' and a green arrow button. Below the filter, a table lists managed properties. The table has columns: Property Name, Type, Multi, Query, Search, Retrieve, Refine, Sort, Safe, and Mapped Crawled Properties. The table lists properties from RefinableString00 to RefinableString11, all of which are Text, Multi, and have a Query type.

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 9: Verify the TreeRefiner

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

If the tree remains empty, then no managed metadata terms are present in the current search results.

Step 10 optional: Create links to results.aspx

If you create links for users to open results.aspx page directly, then you must include the k-parameter with an asterix, like:

```
results.aspx?k=%2A
```

Otherwise the tree will show no results (or result counts if you use the static tree option).

3.1.2 Usage

The TreeRefiner 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 term set, in which these terms occur and also indicates how often they occur in the current result set.

3.1.2.1 Entering search terms

If you enter a new search term into the search box on your search page and submit the search, then a) the search hits are updated and b) the TreeRefiner is updated, too.

Additionally, current selections of refiner values are reset automatically.

Note:

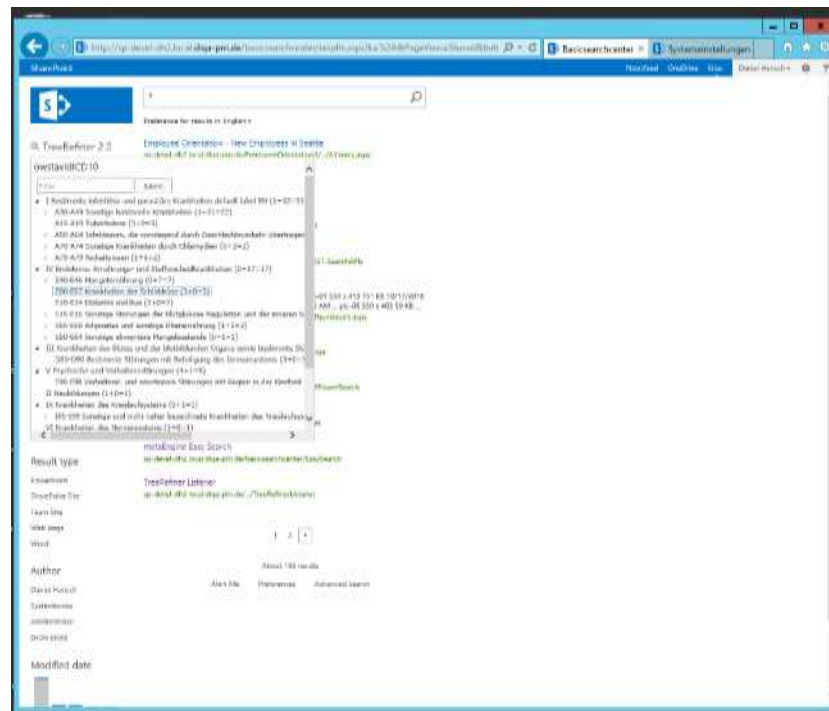
If the configuration option “static tree” has been selected, then the refiner value selections remain unchanged.

3.1.2.2 Displaying the term tree

In the given screenshot we see a managed metadata property “owxtaxIdICD10”. The ICD10 terms are organized hierarchically and thus a tree of terms is displayed. Only these terms are displayed that occur in the search hits of the search results.

Note:

If the configuration option “static tree” has been selected, then the tree displays ALL terms of a term set, i.e. including terms that don't correspond to search hits.



The numbers in each tree node title indicated the number of search hits of this term and it's subterms (depending on the configuration).

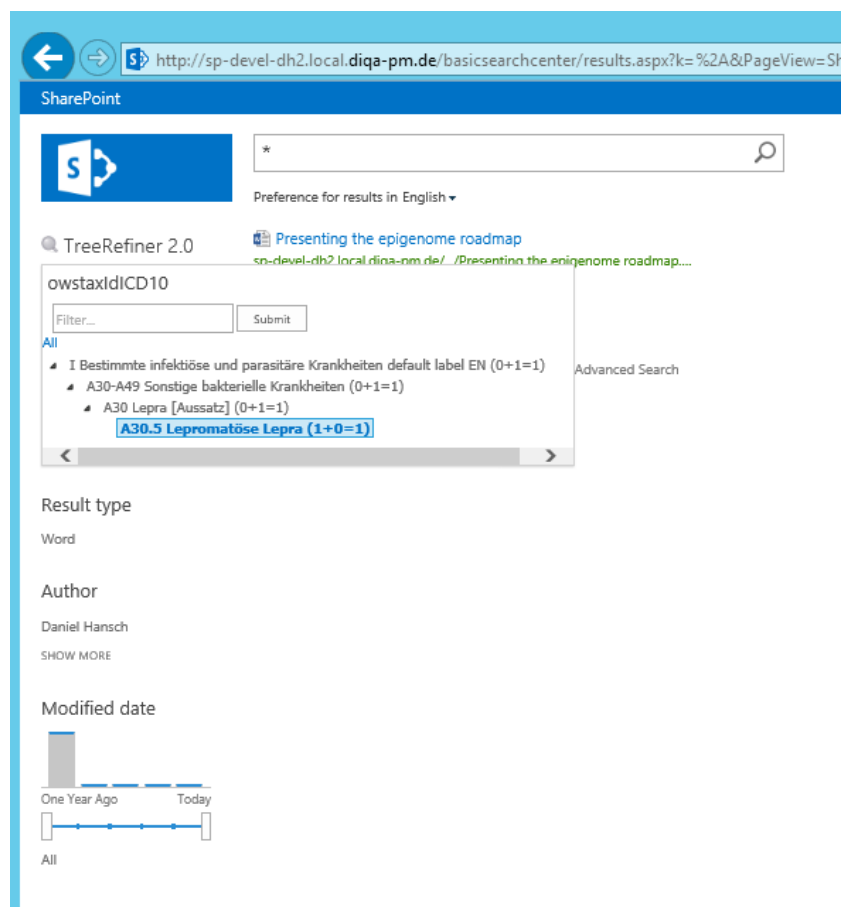
3.1.2.3 Selecting terms (option “multiselect” is OFF)

After clicking on one of the terms (in this case “Lepra”) the search is repeated with an additional restriction, i.e. drill down. All restrictions are highlighted in blue.

Note:

If the configuration option “multiselect” has been selected for the refiner, then you can select multiple nodes.

The updated search results contain only such search hits, that contain the selected term OR sub-terms hereof.



Click on the “All” hyperlink to de-select a refiner. The search results will be refreshed immediately. The “All” hyperlink is only visible if a refiner has been selected.

3.1.2.4 Selecting terms (option “multiselect” is ON)

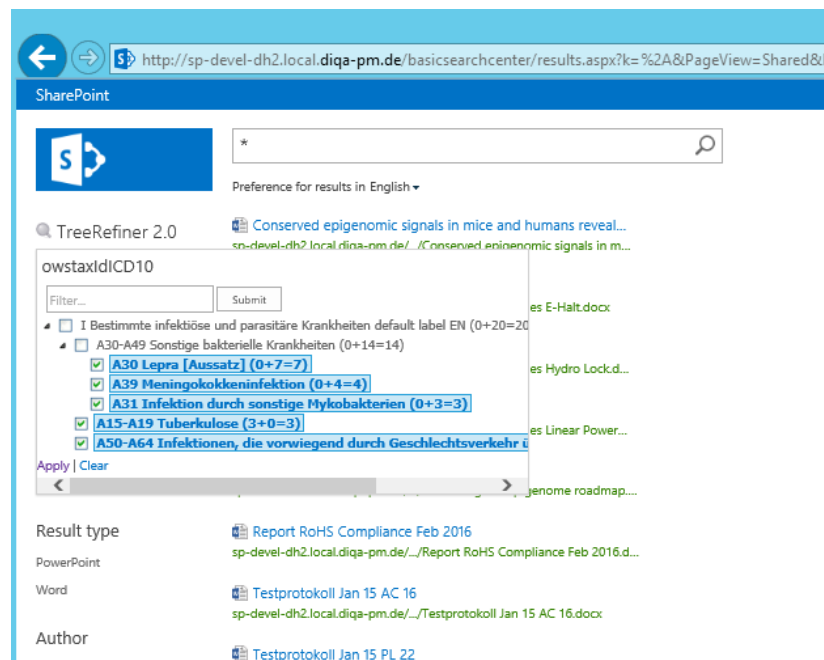
If the refiner has been configured to allow for multiple selections then each tree node comes with a selection box. You can select multiple nodes by selecting the corresponding selection boxes.

Your selection will come into effect if you click on the “Apply” hyperlink at the bottom of the tree.

Note:

If the configuration option “multiselect” has NOT been selected for the refiner, then you can select single nodes only.

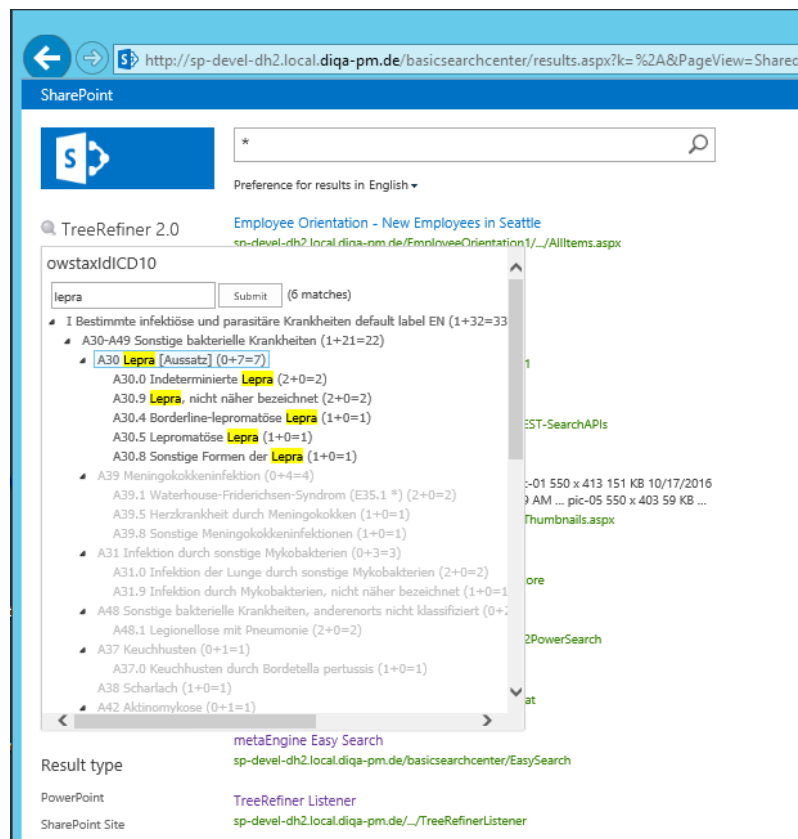
The updated search results contain only such search hits, that contain the selected terms OR sub-terms hereof.



Click on the “Clear” hyperlink to de-select all refiner values. The search results will be refreshed immediately.

3.1.2.5 Filtering the tree

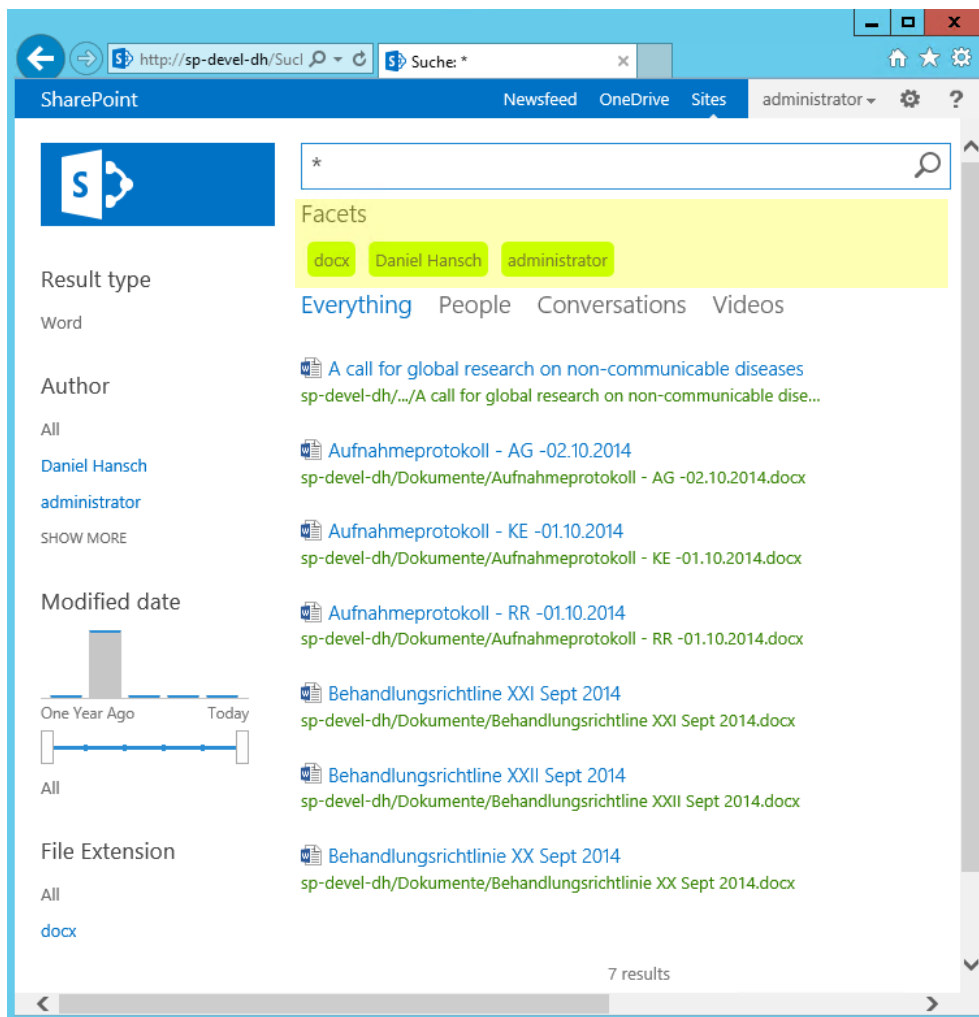
Enter a string into the filter box and click on “Submit” to filter the current tree. Tree nodes without hits are displayed in grey, other nodes will be displayed in black. The occurrences of hits are indicated in yellow. If a node's synonym contains the filter string then this is indicated by appending the word “Synonym” to the node title.



You can reset the filter by deleting the filter string from the filter box.

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.

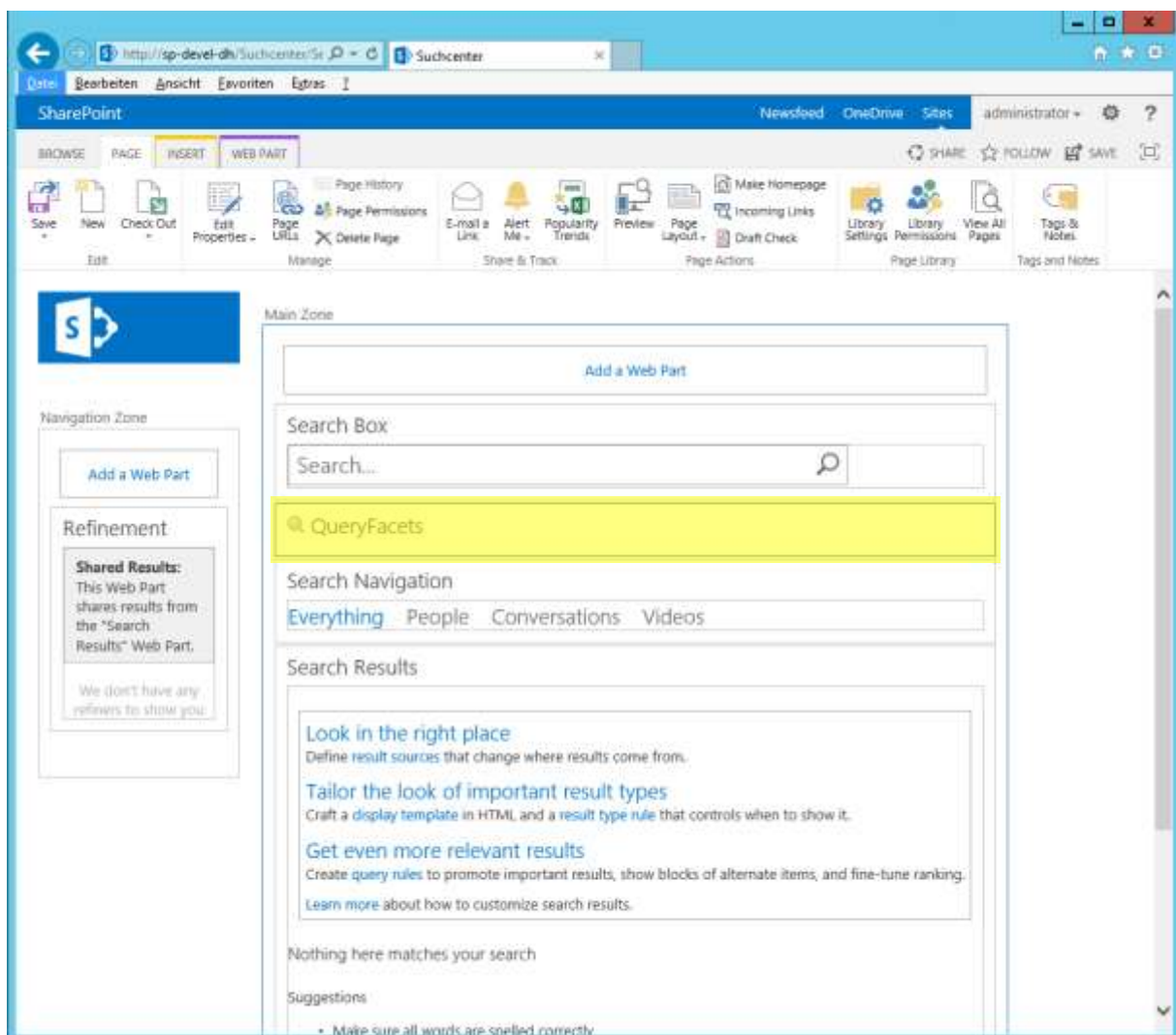
Step 2: Activate the feature “Semantic Search Web Parts” in your site collection.

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.

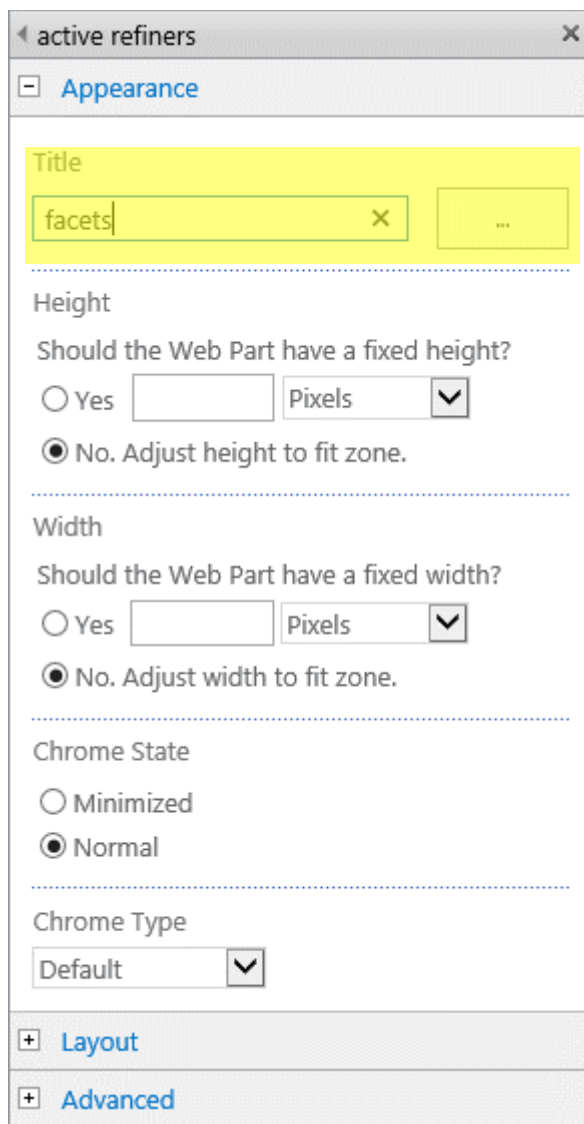


Step 4: Open the configuration settings of the QueryFacets web part

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.



The screenshot shows a configuration dialog box titled "active refiners" with a close button (X) in the top right corner. The dialog is divided into several sections, with the "Appearance" section currently selected and expanded. The "Title" field is highlighted in yellow and contains the text "facets". Below the "Title" field, there are sections for "Height", "Width", "Chrome State", and "Chrome Type". The "Height" section has a question "Should the Web Part have a fixed height?" with two radio button options: "Yes" (unselected) and "No. Adjust height to fit zone." (selected). The "Width" section has a similar question "Should the Web Part have a fixed width?" with "Yes" (unselected) and "No. Adjust width to fit zone." (selected). The "Chrome State" section has two radio button options: "Minimized" (unselected) and "Normal" (selected). The "Chrome Type" section has a dropdown menu with "Default" selected. At the bottom of the dialog, there are two more sections: "Layout" and "Advanced", both with plus signs indicating they are collapsed.

Step 6: 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.

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 QueryTermPicker Webpart

The QueryTermPicker webpart allows users to pick search terms from a tree. The tree is generated from a term set.

3.3.1 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.
2. You have a **term set** in place (e.g. named "search terms" in the context of this guideline) that contains a set of terms that represent frequent search terms.

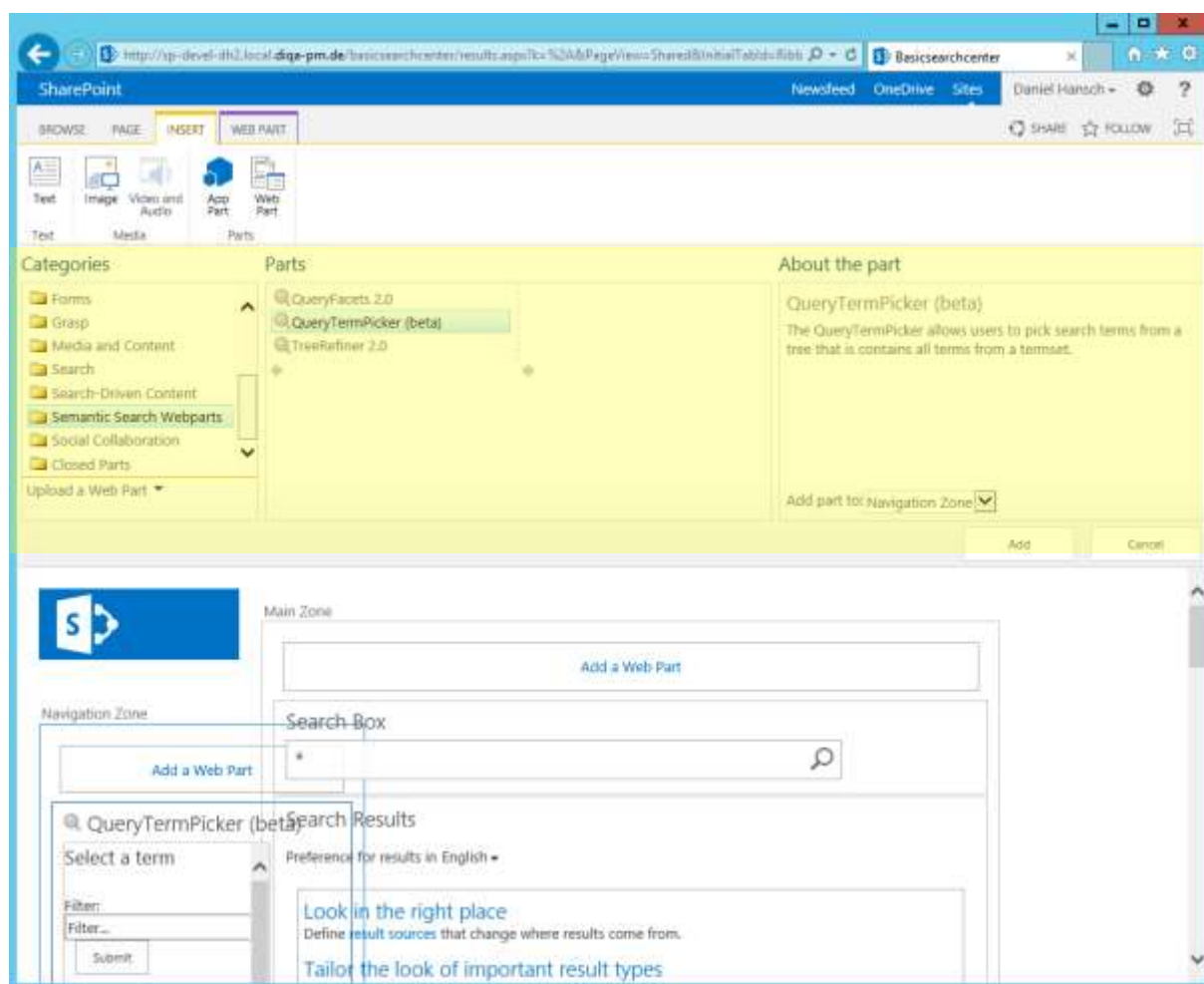
Step 2: Activate the feature "Semantic Search Web Parts" in your site collection.

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):

- QueryTermPicker Webpart

Step 3: Add the QueryTermPicker to the search results page

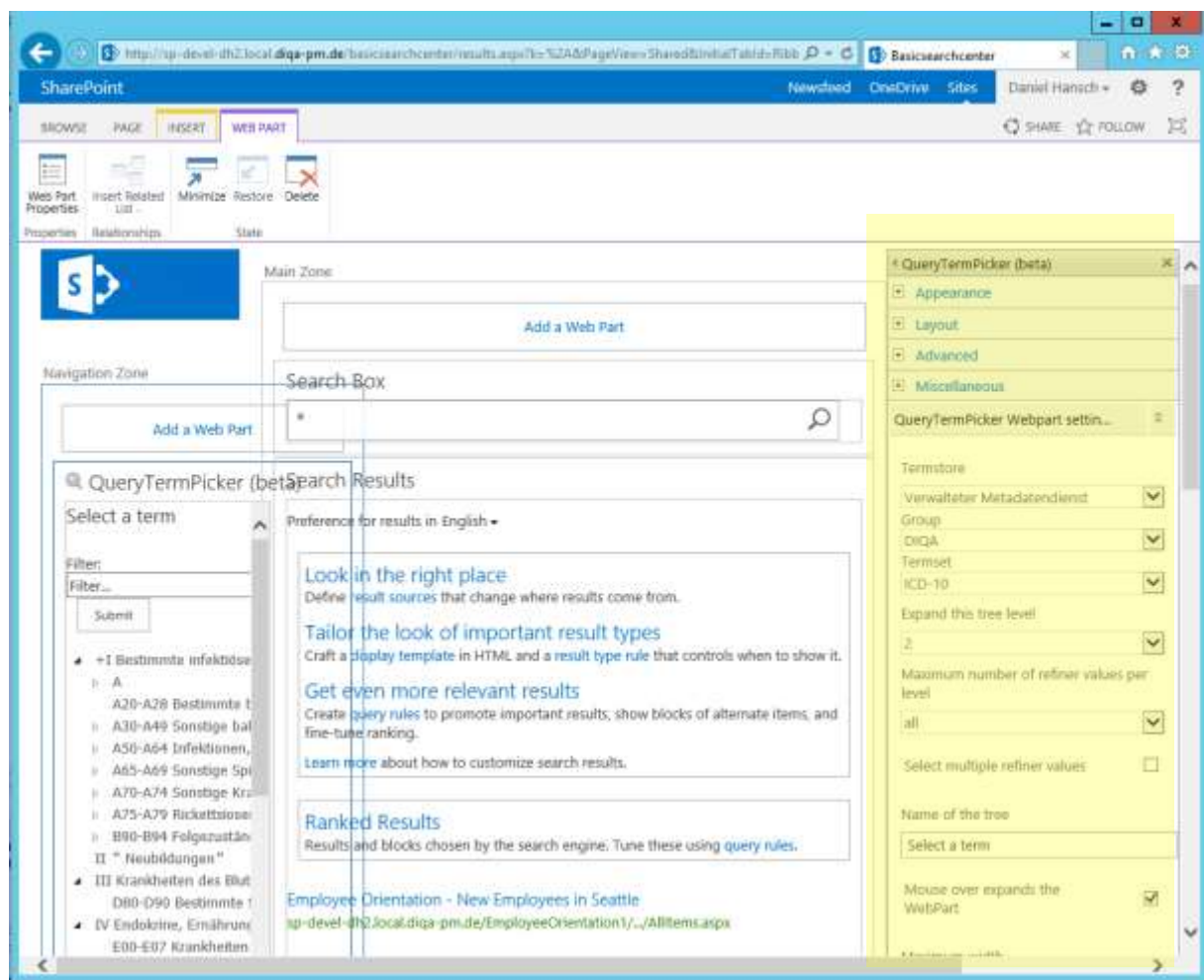
We recommend to add the QueryTermPicker on top of the original "Refiner" web part.



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 QueryTermPicker 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 "QueryTermPicker 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: Open the “Appearance” section of the webpart configuration

Open the “Appearance” section to adjust the tree appearance.

Provide the **title** of the webpart (or just enter a blank to avoid printing out a display name).

Specify if the webpart should have a **fixed height**.

Specify if the webpart should have a **fixed width**.

Chrome State and **Chrome Type** are ignored.

Step 8: Open the “QueryTermPicker Webpart settings” section of the webpart configuration

Open the “QueryTermPicker Webpart settings” to adjust the rest of the QueryTermPicker configuration.

QueryTermPicker Webpart settin...

Termstore
Verwalteter Metadatendienst

Group
DIQA

Termset
ICD-10

Expand this tree level
2

Maximum number of refiner values per level
all

Select multiple refiner values ☐

Name of the tree
Select a term

Mouse over expands the WebPart ☒

Maximum width
500

Maximum height
500

Show tree filter ☒

License key

```
<?xml version="1.0"?>
<License
xmlns:xsi="http://www.w3.org/2001/
XMLSchema-instance"
```

Information for your license request:

- your site GUID: 65df843a-6e02-49b5-a438-a5ca72320980
- your number of users: 12
- product name: Semantic Search Webparts
- product version: 2.0.5

Print trouble shooting information ☒

OK Cancel Apply

6.1 Select a termset

Select 1) the **termstore**, 2) the **termgroup** and 3) the **termset** that contains the manually curated list of search terms.

6.5 Expand this tree level

Select a number to specify how many levels of the tree are initially displayed after the tree has been loaded.

6.6 Maximum number of refiner values per level

Select a number to specify how terms are displayed on each tree level before a paging-node is displayed.

6.7 Select multiple refiner values

Tick this box to allow users to select multiple search terms.

6.8 Name of the tree

Enter the title of the tree.

6.9 Mouse over expands the webpart

If you select this option then the webpart expands if the user enters it with his mouse pointer. This is helpful for bigger trees.

6.10 Maximum width/maximum height

Enter here a value that specifies the maximal size of the expanded webpart (in pixels). Don't enter a "px" or "pixel" etc!

6.11 Show tree filter

Select this option to provide your users with a text entry box to filter the tree.

6.12 License key

Enter here the license key that you have obtained from DIQA.

If you don't enter a license key then you can evaluate the webpart for 30 days.

Step 7: Save the configuration settings and save the search-page.

Save the page.

Step 9: Verify the QueryTermPicker

Open again the search page and enter a search term, e.g. "*". Click on a term in the QueryTermPicker to pick a term. The term will be added automatically to your search query with a "+" as prefix and the search is submitted automatically.

If the tree remains empty, then no terms are present in your term set.

Step 10 optional: Create links to results.aspx

If you create links for users to open results.aspx page directly, then you must include the k-parameter with an asterix, like:

```
results.aspx?k=%2A
```

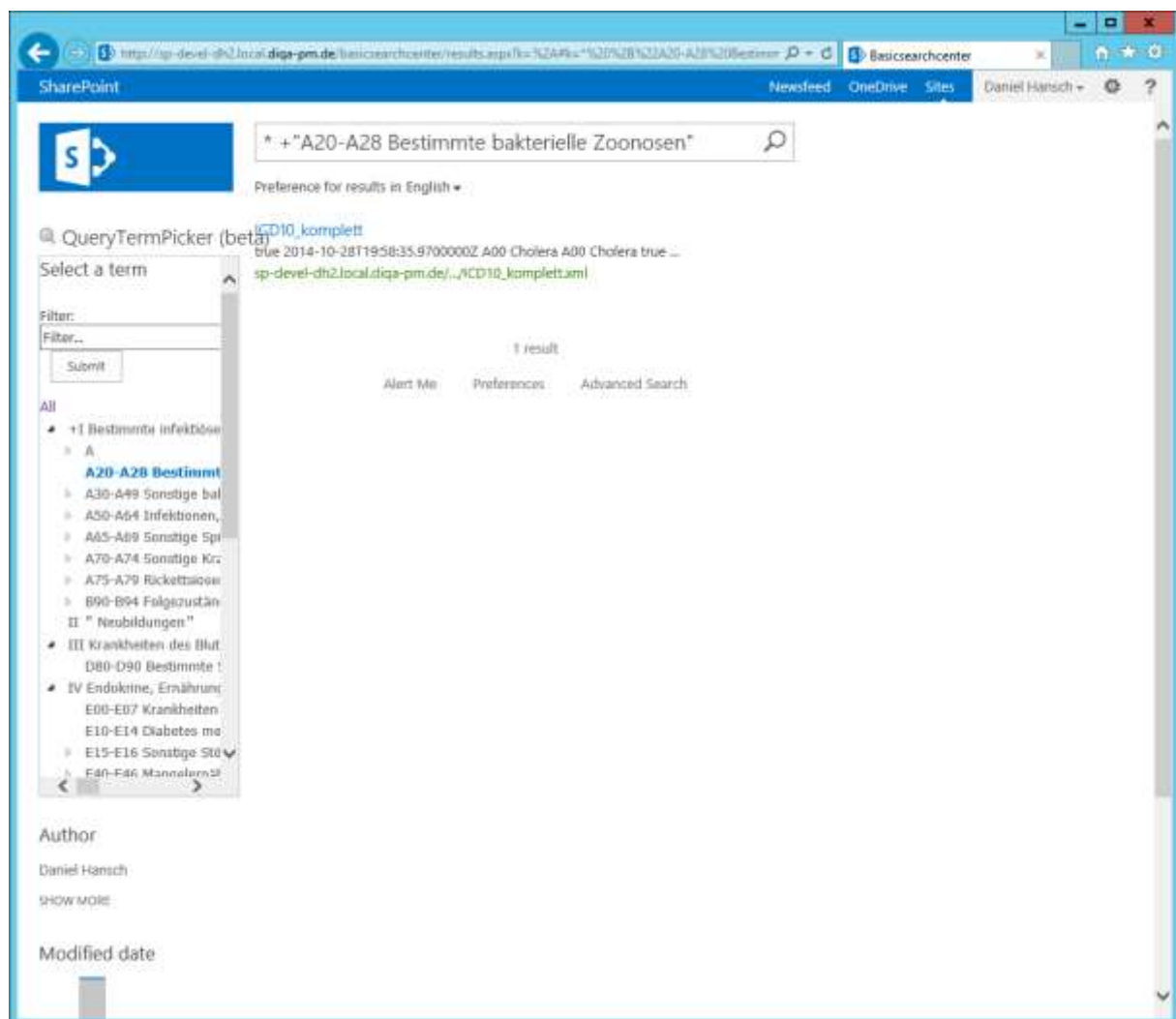
3.3.2 Usage

The QueryTermPicker is used to pick terms from a term set in order to use them in the search query.

3.3.2.1 Picking a search term

If you click on a term in the tree then this term is added to your search term and a search query is submitted. The result of the search are documents that contain your search term **and** the picked term in the fulltext.

Previously picked search terms are automatically replaced by the new search term.



Note:

If the configuration option "select multiple values" has been selected, then you can pick multiple search terms in the tree. Click "apply" to submit your selection.

3.3.2.2 Un-picking a search term

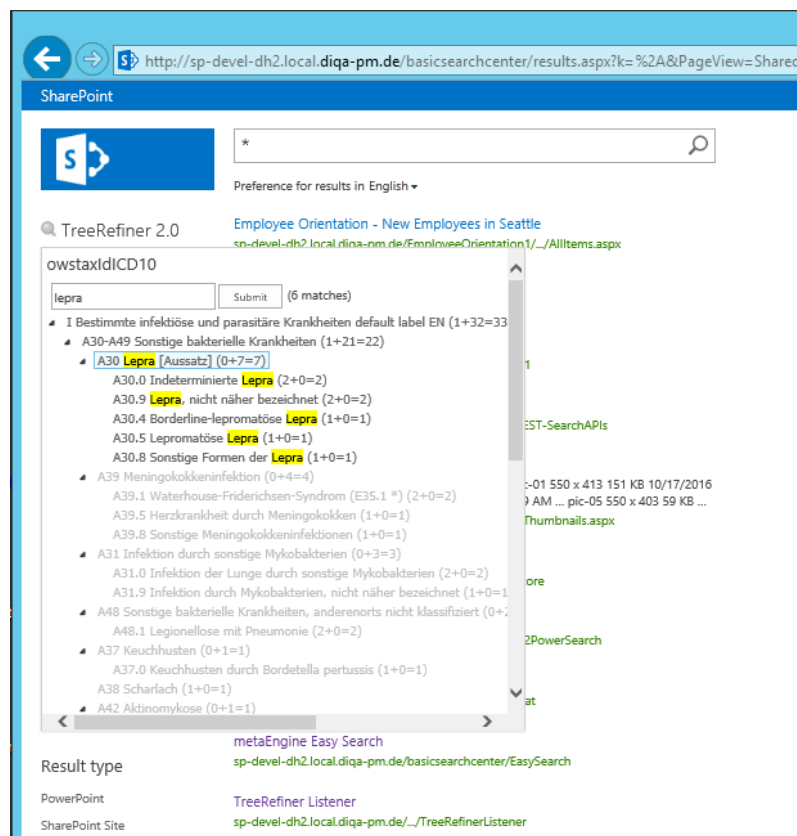
You can remove a picked term in two ways: a) by clicking the "All" link in the webpart or b) by removing the term from the search entry field. In the later case you have to submit the new query manually.

Note:

If the configuration option “select multiple values” has been selected, then you can un-pick all search terms by clicking on the “clear” link.

3.3.2.3 Filtering the tree

Enter a string into the filter box and click on “Submit” to filter the tree.



You can reset the filter by deleting the filter string from the filter box.

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 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