



Microsoft®

SharePoint® 2013

~~SPHOL210:~~ People Search in SharePoint 2013

Hands-On Lab

Lab Manual

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People Search in SharePoint 2013

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

Lab Objectives

If you completed the “Introduction to Search” lab of this series, you already know that Search is ubiquitous in SharePoint 2013. This hands-on lab highlights enhancements made to People Search in SharePoint 2013.

The new People Search features capitalize on the rich information contained in people’s contributions: documents, activities, posts, blogs, mentions, and other items they create on a daily basis. SharePoint 2013 Search extracts information from this dynamic content and helps you find people with specific attributes, for example skills, knowledge, and abilities. This “social search” capability enables you to discover rich, business-relevant information about people in your organization in just a few clicks.

After completing this lab, you will know how to:

- Use the new People Search features to find the right people, expertise, and results faster
- Modify the People Search results page by adding or reconfiguring web parts
- Explore the social content and deep links in the People Search hover panel
- Quickly access your colleagues’ personal profiles from search results

Technologies

- SharePoint 2013 Search

Audience

- SharePoint Site Administrators and SharePoint IT Professionals

Scenario

This lab will show how to explore, modify, and enhance the People Search experience with specific emphasis on Social Search features.

Getting Started

Connect to the Lab Environment

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

Open the Lab Environment

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

- b. In the upper navigation, click the down-arrow next to **Resources** and then click **Document Center**.
- c. Click on a PowerPoint presentation and see it open in a Web App.
- d. Click the **back-arrow** to return to the Document Center.
- e. Repeat steps c and d for Word and Excel documents.
Note: if you do not see a specific document type in the top view, in the left navigation click **Documents** and select from that list.
- f. In the upper navigation, click **Home** to return to the demo home page.

Exercise 1 – Enhanced People Search Experience

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

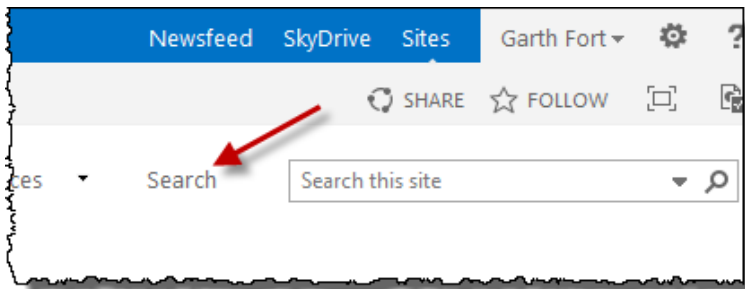
Scenario

People Search in SharePoint 2013 has many improved ways to search for people, including by their social content, location, phone number, native language, and others. In this exercise, you will learn new ways to conduct people searches, and to quickly access a person's profile information and contributed content directly from the results page.

Task 1 – Explore Ways to Find People

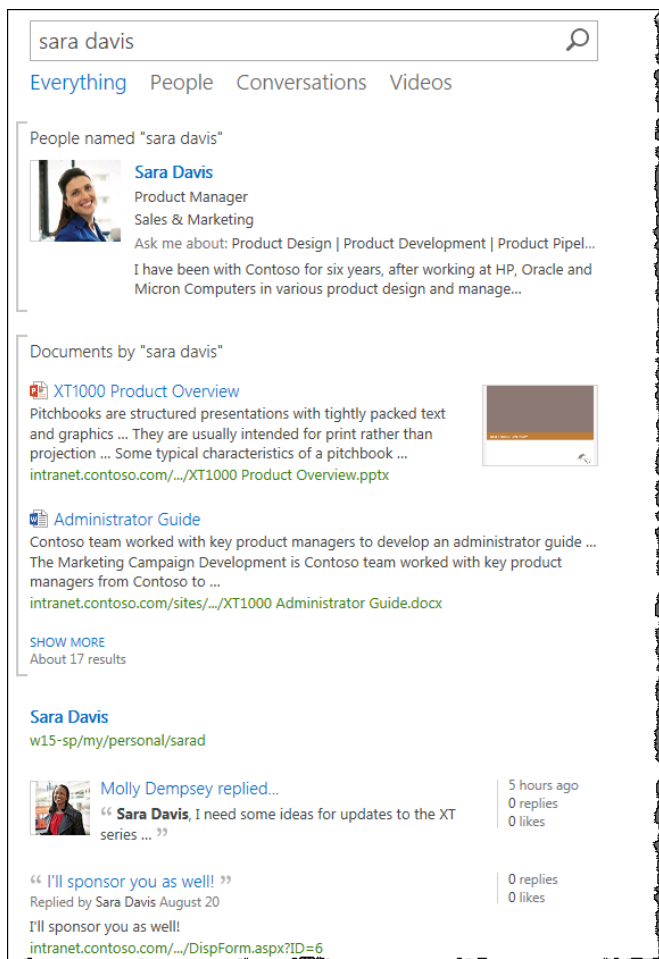
In this task, you will learn how to find a person using different search terms and refiners.

3. In Internet Explorer, in the demo home page, in the top navigation, click **Search**.



4. In the query box, type **Sara Davis** and then click the **search icon**.

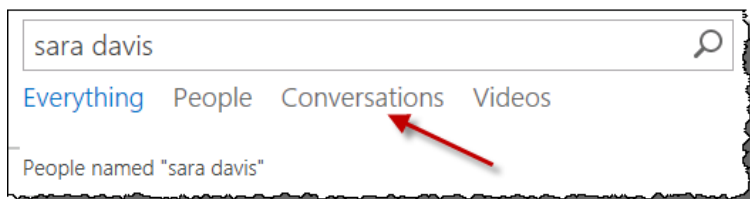
5. Note the result blocks **People named “Sara Davis”** and **Documents by “Sara Davis”**.



The two result blocks display because behind the scenes, two query rules were triggered by your search. Task 3 of this lab provides a more detailed discussion of query rules, so we will not expand on that further right now. However, note that a simple name query returns content authored **by** the person as well as information **about** the person.

Let's do some simple filtering of the search results for Sara Davis. In the following example, we will use the scope refiner below the search box to filter results. Specifically, let's show only conversations to which Sara contributed.

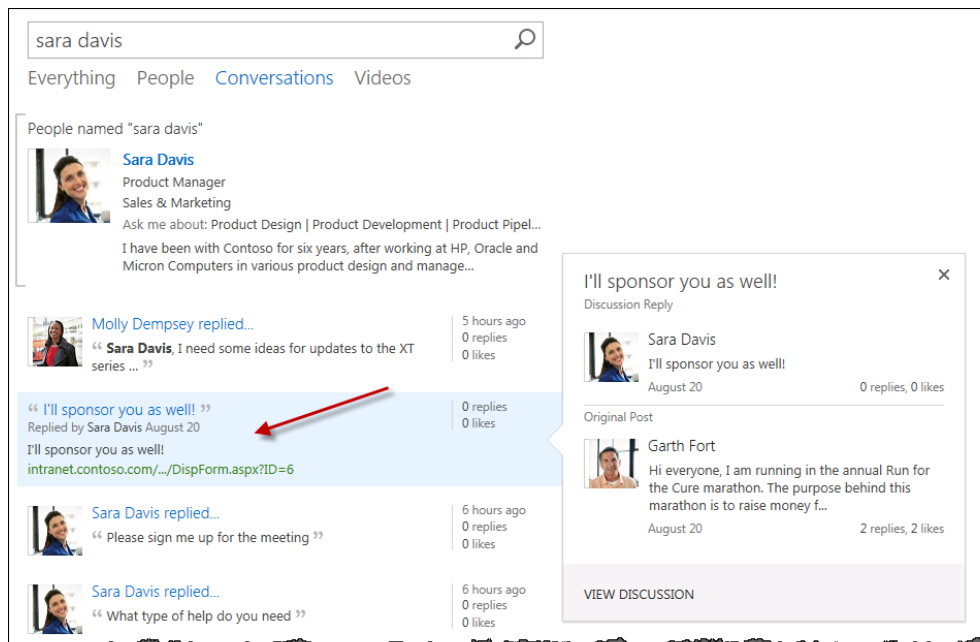
6. In the results page, below the search box, click the **Conversations** scope refiner.



- a. Note the different conversations between Sara and team members.

Note: if you do not see the conversation the first time, click the **People** scope refiner, confirm that there is a result for Sara Davis, and then click the **Conversations** scope refiner again.

- b. Pause on one of the conversations and view details in the hover panel. In the screen shot, we show a conversation called “I’ll sponsor you as well”.



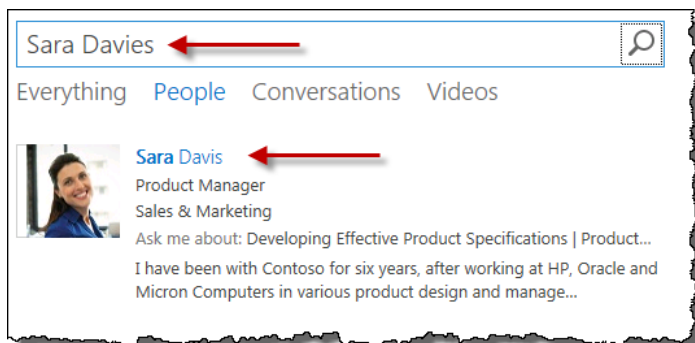
This is an example of how SharePoint 2013 Search goes beyond a limited view in the results list by providing rich detail in a preview mode. Now, let’s explore a few more ways to search for people.

7. In the scope refiner below the search query box, click **People** to change the search scope back to people search. Note that only one result was returned, because we are in the People scope and there is only one person in the organization with that name.
8. Clear the search box and type **Sara Davies** (note the misspelling). Note the “Are you looking for” search suggestion. You may have to wait a few seconds for the suggestion to appear.



9. **Do not** click the suggestion at this time; instead, click the **search icon** to complete the search for **Sara Davies**.

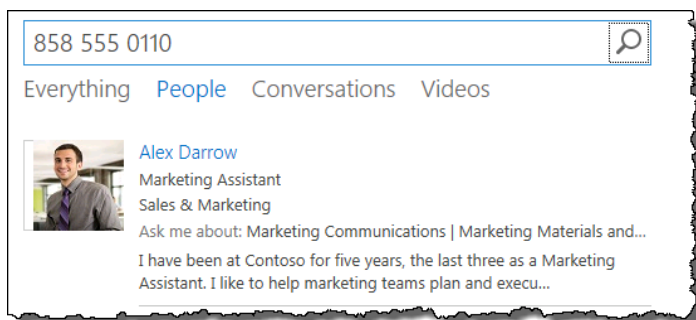
10. Note that People Search returned the closest match, **Sara Davis**.



This is an example of “Fuzzy Matching”. If your name query is not exactly correct (but close), you are still likely to find the right person by either clicking the suggestion, or completing the search with the misspelled name; in the latter case, Search finds the closest match.

Search can also find a person by his or her phone number.

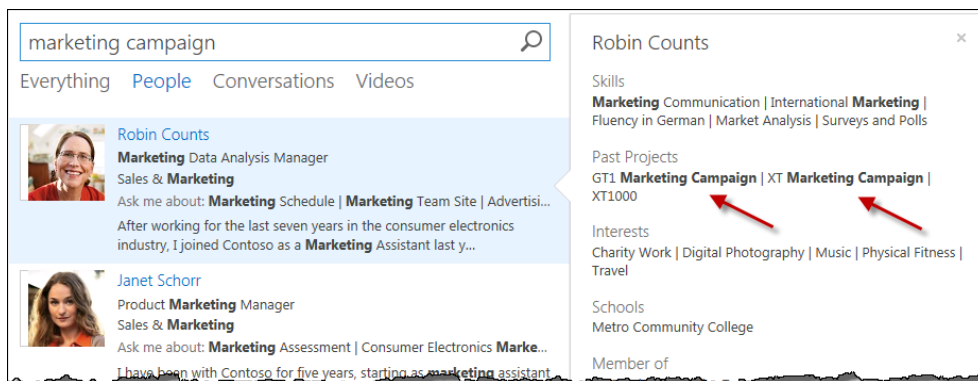
11. While still in People Search, type **858 555 0110** into the query box and click the **search icon**.



Task 2 – Find People Through Contributed Content

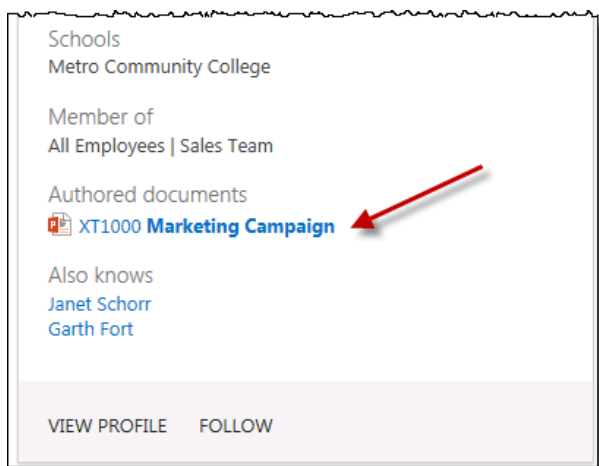
In the previous task, we learned to find people using search terms that relate to their profile (for example, name or phone number) and saw that search content returns content authored by the person. In fact, discovering a person's contributed content this is one of the best ways to find individuals who may have the skills, knowledge, and experience you are looking for. In this task, we'll see some examples of how this works when the search scope is “People”.

1. While still in People Search, clear the query box and conduct a search for **marketing campaign**.

2. Pause on the result for **Robin Counts**.

Note where “marketing campaign” is highlighted in “Past Projects”. People Search discovered two very relevant projects in Robin’s profile. So we can safely assume that Robin knows quite a bit about marketing campaigns...a great lead.

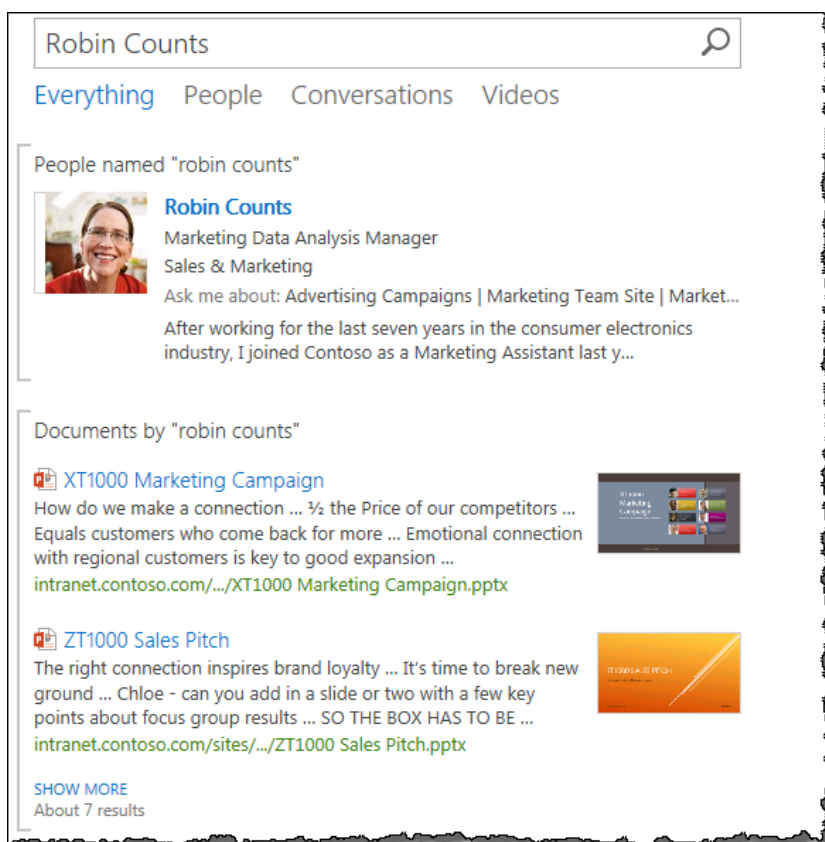
3. Lower in the hover panel, note that People search has discovered content about marketing campaigns that Robin authored.



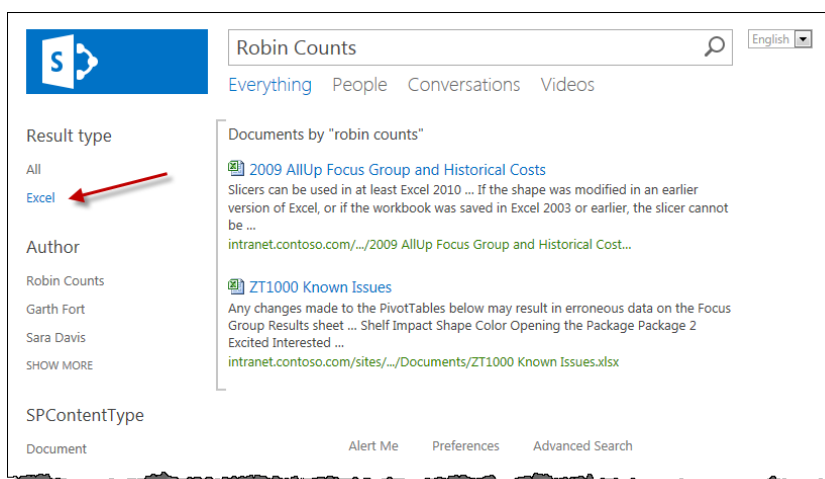
We can also find content-related results in the “Everything” scope, and additional refiners are available there. We covered that earlier, but let’s explore it a bit further now.

4. In the search query box, type **Robin Counts** and click the **search icon**.
5. In the scope refiner below the query box, click **Everything**.

6. Note the result block **Documents by “robin counts”**.



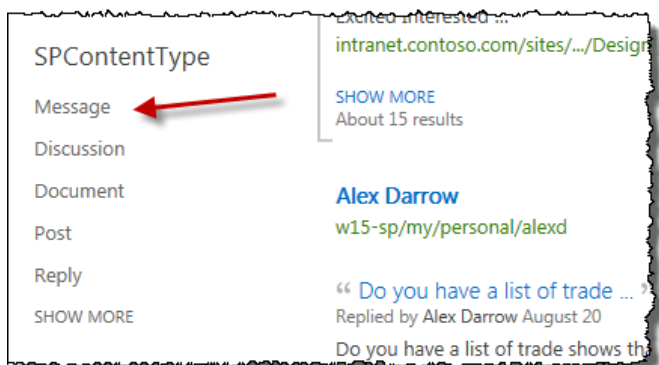
7. In the **Result type** refiner at the left side of the page, click **Excel**.
8. Note the Documents by “robin counts” result block now contains only Excel results.



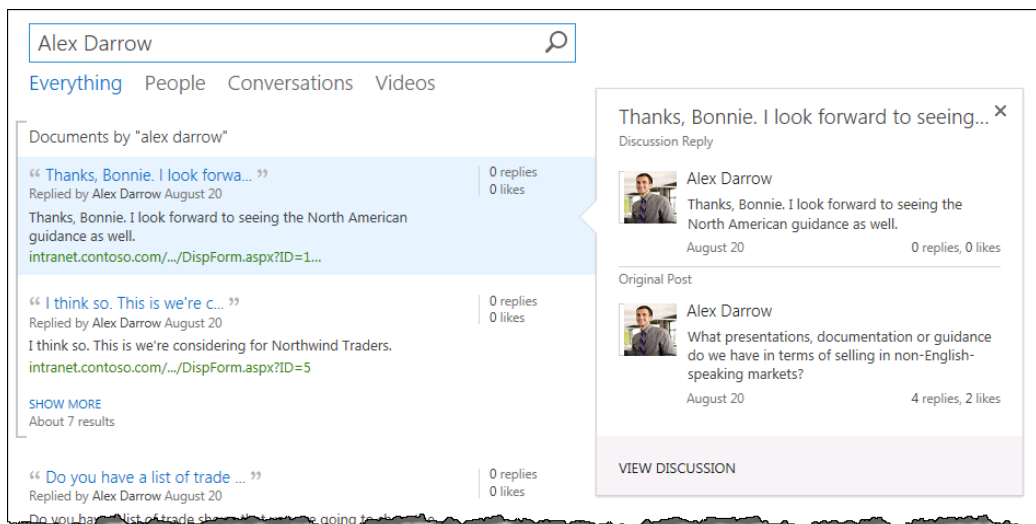
Task 3 – People Search Refiners

In this task, we'll see that social content contributed by an individual can also be discovered in the “Everything” scope. Search refiners will help us find these results.

1. Clear the query box, type **Alex Darrow**, and click the **search icon**. Note the variety of results, including “People named”, documents authored by Alex, a link to his personal site, and discussions.
2. At the bottom of the left navigation, under the **SPContentType** refiner, click **Message**.



3. Pause on a message to see the discussion.



4. In the **SPContentType** refiner, click **All**.
5. Click one or more of the following social content categories and explore the results. Between each refining step, click **All** to return to the complete list of content types.
 - a. **Post**
 - b. **Reply**

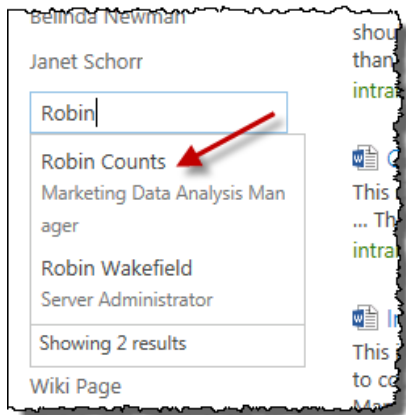
Note: If you do not see **Reply**, click **Show More** to display the remaining categories.

6. In the refiner below the search query box, click **Everything**.

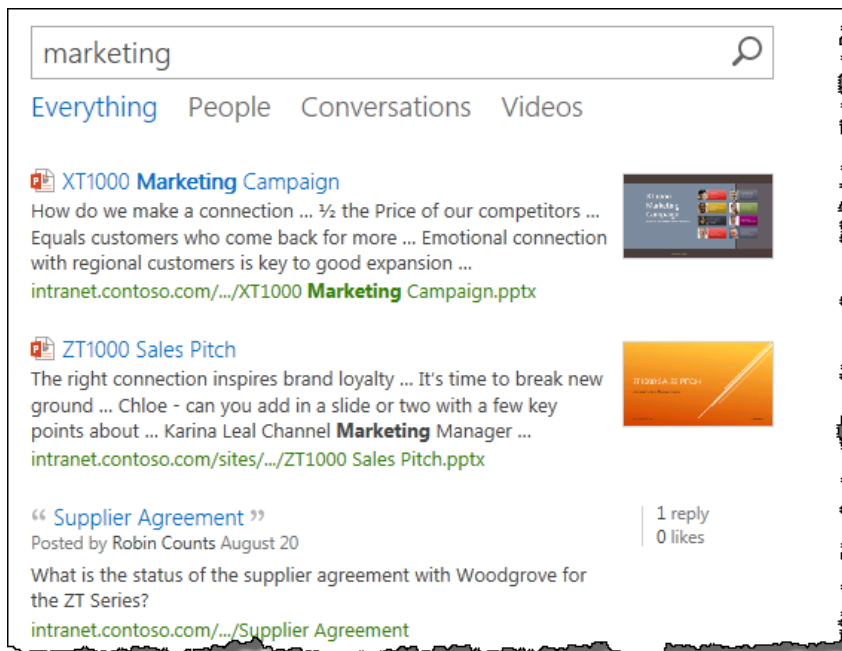
New in SharePoint 2013 Search is an extension to the **Author** refiner which lets us input any name on which to refine the search results.

7. Clear the search query box and conduct a new search for **marketing**.
8. In the **Author** refiner, click **SHOW MORE**.

9. In the **Enter a name...** box, start typing **Robin** and accept the suggestion “Robin Counts”.



10. Note that Search returns content relating to “marketing” authored by Robin.



In this exercise, you learned how to discover rich information from colleague profiles and contributed content. You also used People Search refiners to find specif types of social content and refined search results by author.

Exercise 2 – Active Preview in People Search

Estimated time to complete this exercise: **10 minutes**

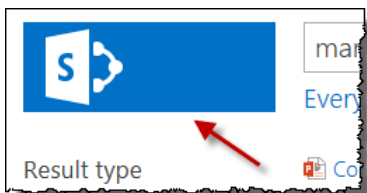
Scenario

Active Preview (also known as the hover panel) is a new feature in SharePoint 2013 Search. This feature saves time by presenting key information, metadata, actions, and links in a pop-up panel when a user pauses on a search result. We introduced hover panels in Exercise 1. In this exercise, you will more fully explore the links, options, and actions available in the People Search hover panel.

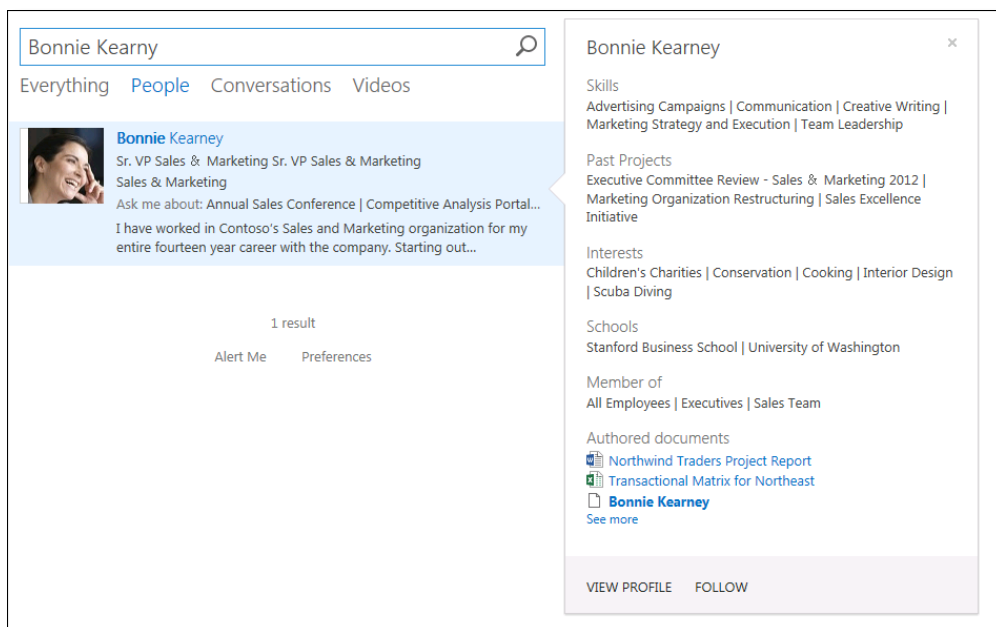
Task 1 – Explore the People Search Hover Panel

In this task, you will explore the People Search hover panel, starting with the standard items.

1. At the upper left of the page, click the **SharePoint icon** to open a fresh search page.



2. Conduct a search for **Bonnie Kearny**.
3. Below the query box, in the scope refiners, click **People**.
4. Pause on the result for **Bonnie**.



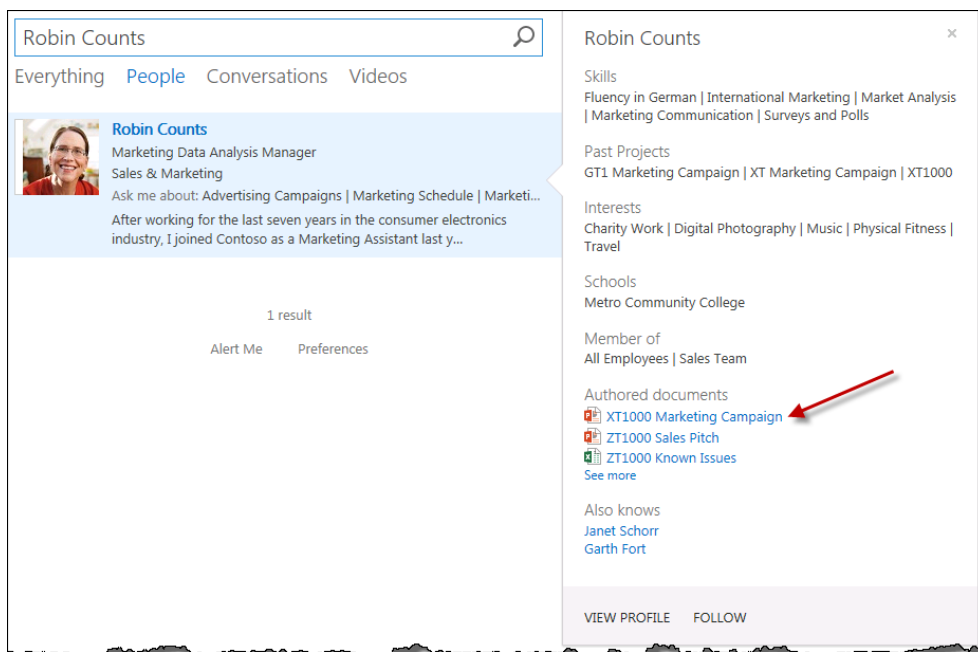
5. Explore the areas in the hover panel. They display a great deal information from the person's profile, documents they have authored, and social content.
 - a. **Profile information**

- i. Skills
- ii. Past Projects
- iii. Interests, Schools, Memberships
- b. **Authored documents**: list of documents contributed by the person, and a “See more” link.
- c. **VIEW PROFILE** link: to access the person’s SharePoint profile.
- d. **FOLLOW** or **STOP FOLLOWING** link: to follow or stop following the person’s activities.

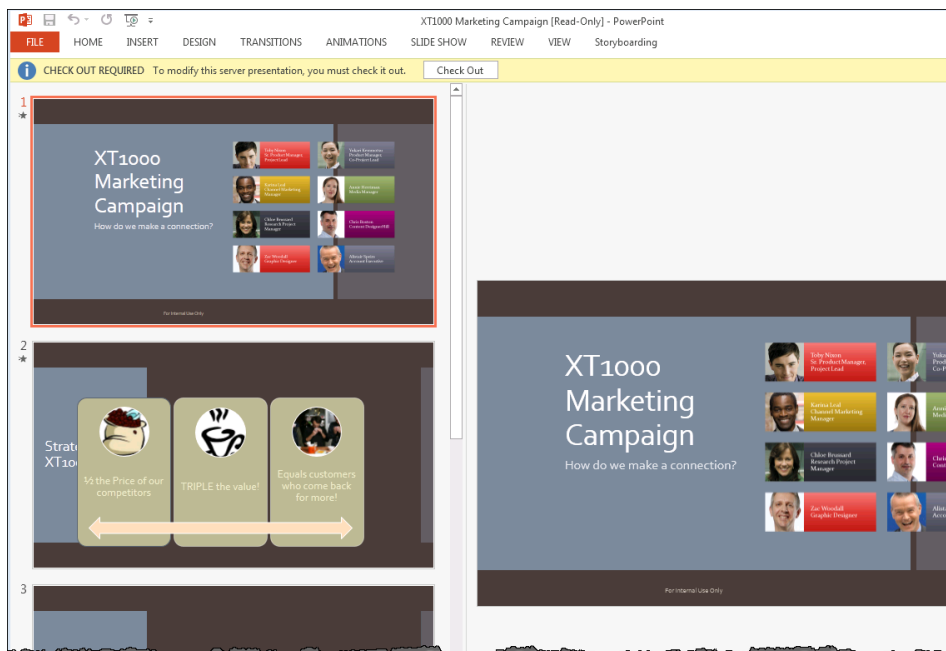
Task 2 – Access Content from the Hover Panel

The People Search hover panel provides quick access to content authored or edited by a person, without having to scroll through a long list of search results. For example, suppose I am not only interested in marketing campaigns in general, but specially want to find Robing Counts’ work in this area. The hover panel provides a “deep link” directly to authored documents without having to do another search query.

1. Clear the search query box and conduct a new search for **Robin Counts**.
2. Below the query box, make sure the **People** scope refiner is still selected (it will be highlighted in blue)
3. In the **Authored documents** list, click **XT1000 Marketing Campaign**.



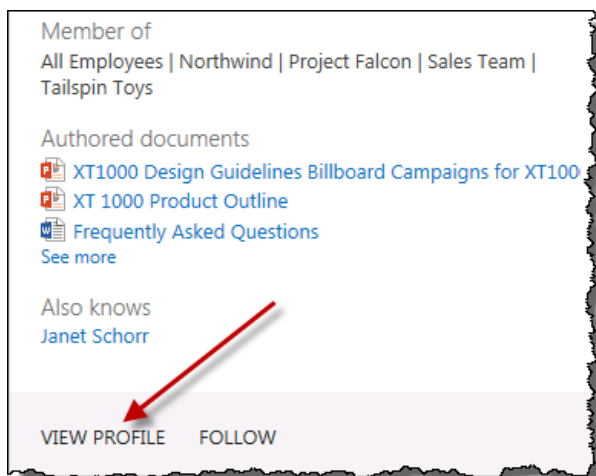
4. In the dialog box, click **Open**. Wait for the presentation to open in PowerPoint client.

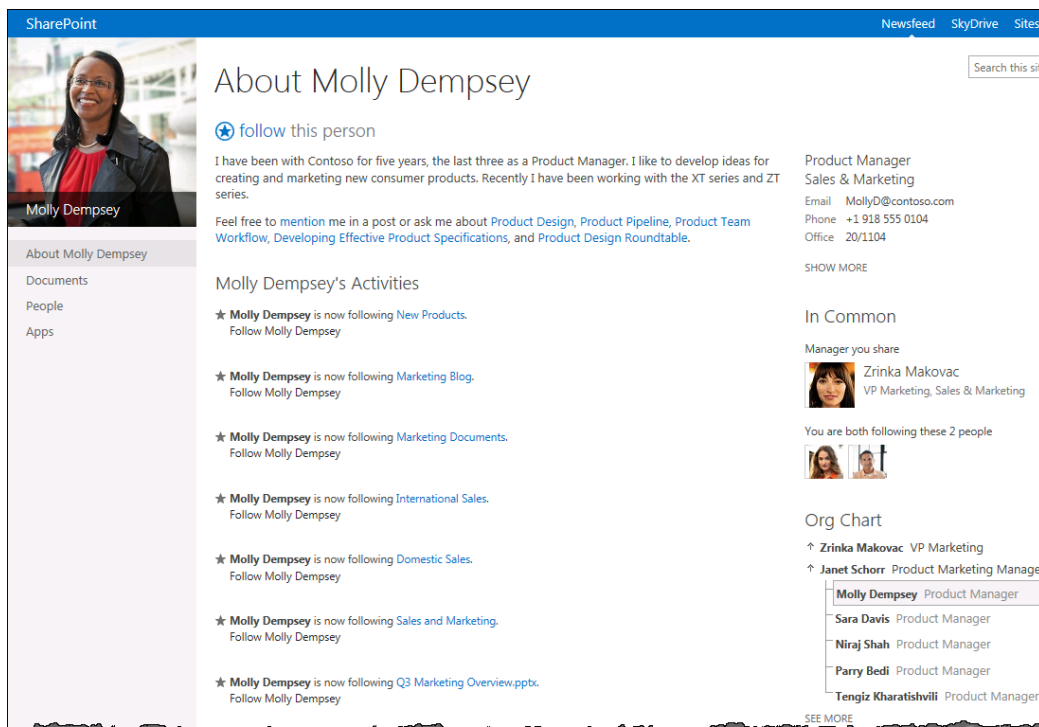


5. Close PowerPoint client.

In addition to content, the hover panel provides instant access to a person's profile without having to do another search.

6. Clear the search query box, type **Molly Dempsey** and then click the **search icon**. Make sure you are still in the **People** scope.
7. Pause on the **Molly Dempsey** result, and in the hover panel, right-click **VIEW PROFILE** and select **Open in New Tab**.



8. Navigate to the tab for **Molly Dempsey**.

9. Note the rich information, the organization chart, and access to Molly's social content that was gained with just one click from People Search results.

10. Close Molly Dempsey's profile tab.

By completing this exercise, you learned how the People Search hover panel helps find information quickly. You explored how the panel is structured, and how easy it is to find authored content and a person's profile information in just a few clicks.

Exercise 3 – Query Rules in People Search

Estimated time to complete this exercise: **10 minutes**

Scenario

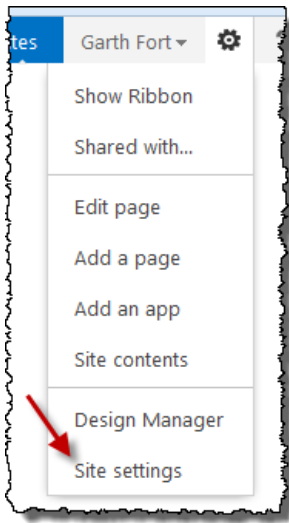
Query rules, new in SharePoint 2013 Search, are used to define the ranking or display of search results. For example, a query rule can promote specific results or result types that would not otherwise rank near the top in a list ranked only by relevance. In this exercise, we will explore a query rule that promotes people's names and authored documents.

Task 1 – Explore the Query Rule

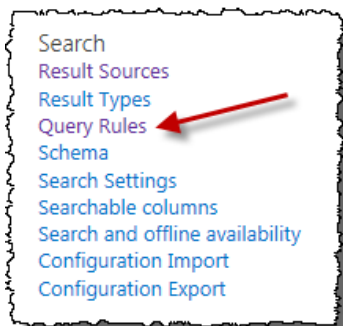
In this task, you will open a query rule and briefly explore its structure and settings.

1. In a new tab, open a fresh search page.

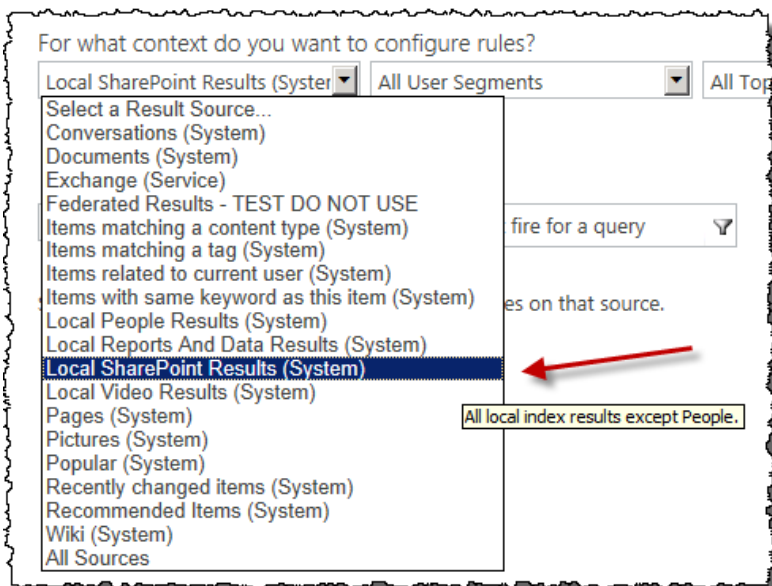
2. At the upper right, next to the user name, click **Settings** (the gear icon) and in the drop-down menu, click **Site Settings**.



3. Under **Search**, click **Query Rules**.

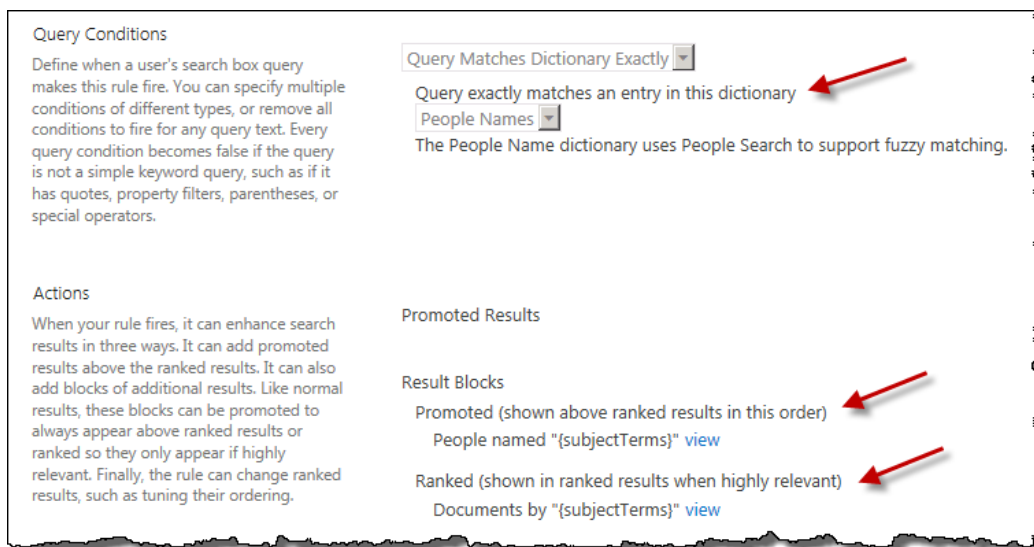


4. In the **Manage Query Rules** page, in the **Select a result source...** drop down menu, select **Local SharePoint Results (System)**.



5. Under **Provided by SharePoint**, click query rule **People Name in SharePoint Search**, and then click **View**. The Query Rule page will open.

We will now explore the query rule conditions. When conditions are satisfied as a result of a search query, the rule “fires” and actions are taken. In the following steps, refer to this screen shot:



6. Explore the rule **Conditions**:
 - a. **Query Matches Dictionary Exactly**: The rule fires when the query contains a term from a dictionary called “People Names” This is a dictionary of people in the organization.
7. Explore the rule **Actions**:

- a. Under **Actions**, note that there will be two result blocks displayed. We will explore one of these, the one that displays documents authored by person.
- b. Under **Result Blocks**, next to **Documents by "{subjectTerms}"**, click view (see the screen shot in step 5).
- c. In the **View Result Block** window, expand **Settings**.

View Result Block

Query Variables

Query variables are set by the rule's query conditions. You can use them in the block's title and query. [Learn more.](#)
{searchboxquery} - the original query from the search box
{subjectTerms} - the matched dictionary entry from People Names

Block Title

Title for this language: English (Default) ▼
 Documents by "{subjectTerms}"

Query

Configure Query

{subjectTerms} Author:"{subjectTerms}" XRA

Launch Query Builder

Search this Source

Local SharePoint Results (System) ▼

Items

2 ▼

Settings

☐ Do not show a "more" link

☒ "More" link goes to the following URL

{resultsurl}?k={subjectTerms} Author:"{subjectTerms}"

☐ This block is always shown above core results

☒ This block is ranked within core results (may not show)

Group Display Template

Default Group ▼

Item Display Template

Use Result Types ▼

- d. Click in the **Configure Query** box and while keeping the left mouse button down, scroll to the right so you can see the entire query.

Query

Configure Query

{subjectTerms} XRank(cb=5000.00) IsDocument=1

Launch Query Builder

Search this Source

Local SharePoint Results (System) ▼

Items

2 ▼

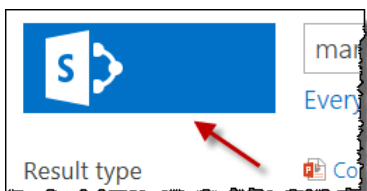
- e. Notice the query takes the subject terms (typed into the query box) and promotes Documents (that is the function of the **XRank** operator).
8. Click **OK** to close the **View Result Block** window.

- At the bottom of the **View Query Rule** page, click **OK**. You will return to the **Manage Query Rules** page.

Task 2 – The Query Rule in Action

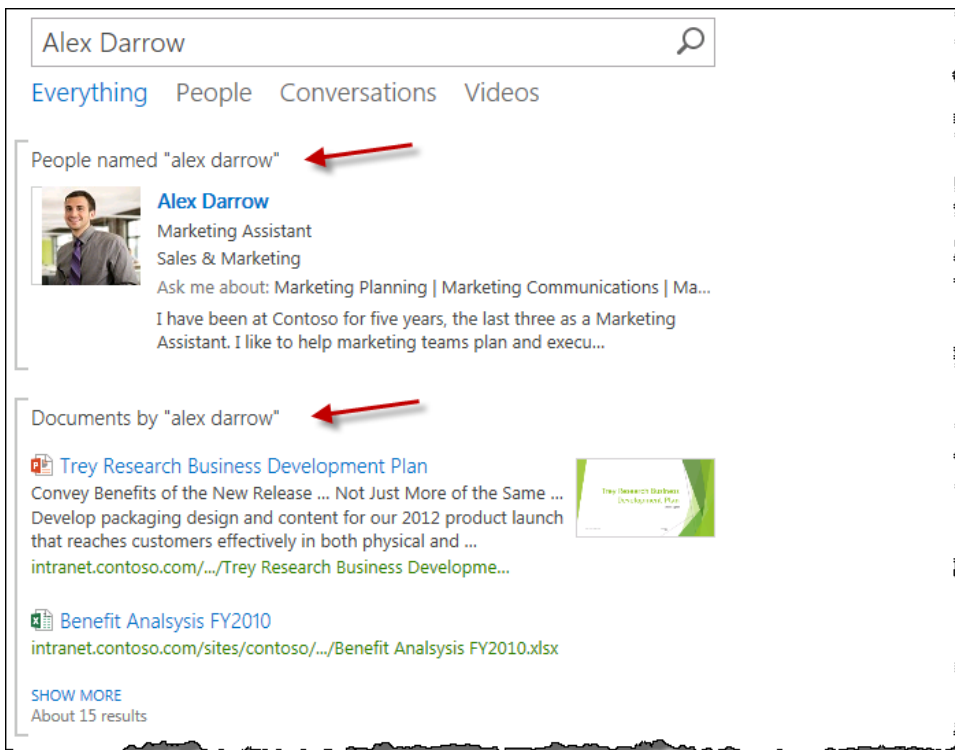
Having explored how the **People Name in SharePoint Search** rule works, we will now use it in a query.

- In the upper left, click the **SharePoint icon** to return to a fresh search page.



- Conduct a search on **Alex Darrow**.

Note: your results may not be exactly as shown in the screen shot.



Note the result blocks **People named “alex darrow”** and **Documents by “alex darrow”**. You now know how these blocks were generated. Because Alex Darrow matches an item in the People Names dictionary, the query rule fired. The query in the **Documents authored by** result block retrieved items of the “Document” type and placed the most relevant results in the block. Note the **SHOW MORE** link; clicking the link would take you to a complete list of content authored by Alex. If you have time, try it and see!

By completing this exercise, you learned how to open and explore a People Search query rule that promotes people's names and authored documents.

Summary

In this hands-on lab, you were introduced to some of the new and extended features of People Search in SharePoint 2013. You explored many ways that search results can be configured and displayed, and saw how social content and contributed documents have a central focus in People search. Specifically, you learned to:

- Explore a variety of People Search options to find individuals faster.
- Explore the social and contributed content and links in the People Search active preview (hover panel).
- Open and explore a Search query rule that fires on a people name search, and see it in action.