



Configure Managed Navigation in SharePoint 2013

Agnes Molnar, Search Explained (2013)

Configure Managed Navigation in SharePoint

© 2016 All rights reserved.

Published by Search Explained

P.O. Box 22, Diosd, 2049 HUNGARY

<http://SearchExplained.com>

E-book edition created 2016.

Originally published as a blog post (2013):

<http://www.searchexplained.com/configure-managed-n...>

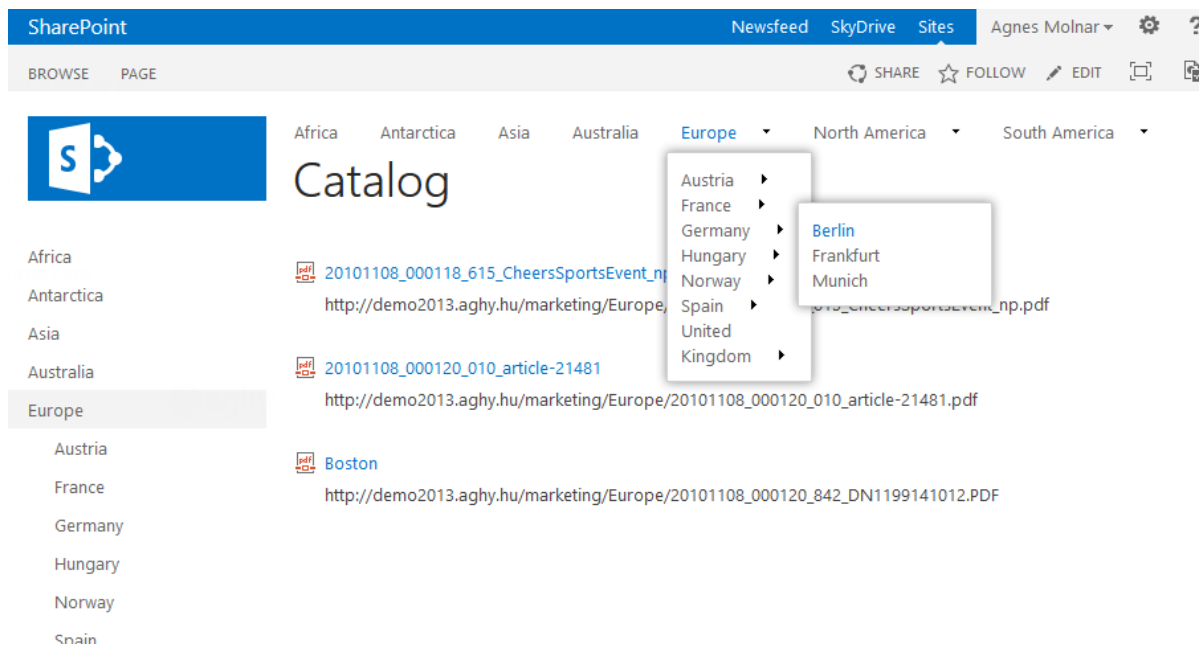
All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means – for example, electronic, photocopy, recording – without the prior written permission of the publisher. The only exception is brief quotations in reviews, with a link to the book and/or <http://SearchExplained.com>.

All trademarks, service marks, trade names, product names and logos appearing in this book are the property of their respective owners.

This mini guide is an independent publication and is not affiliated with, nor has it been authorized or sponsored, by Microsoft Corporation.

The Goal

In SharePoint 2013, one can create dynamic metadata navigation, using the benefits of both Managed Metadata and Search. The result is a dynamic navigation, build in by taxonomy, showing the current search results filtered by the current node (with or without children, based on the current configuration).



Expected behavior:

- Navigation has to be dynamic. When one adds a new term to the term store, it has to get displayed on the navigation (and has to work) immediately.
- On the target page, search results have to be displayed, filtered by the selected navigation item.
- A configuration parameter is expected to define if the exact matches should be displayed only, OR the matches for the children of the selected navigation item too. (For example, when one selects "Germany" above, the values for "Berlin", "Frankfurt" and "Munich" should be displayed or not.)

(Note: as the results/items are provided by search, they're refreshed by the Crawling Process.)

Steps to achieve this behavior in SharePoint 2013:

- Preparation (create a site and a target page)
- Managed Metadata configuration (Term Set)
- Search configuration
- Site navigation settings
- Insert and customize a Content Search Web Part

Implementation

Preparation: You have to create a page that will be the target page later, to be able to reference it in the next steps.

1. Create a site where you want to use the metadata navigation. For example, */catalog*.
2. Create a target page, where you'll add the proper Content Search web part later (leave it **empty** for now).
3. Save the page, for example with the name */catalog/SitePages/Home.aspx*.

The **Term Set** has to get created as always, with some special settings

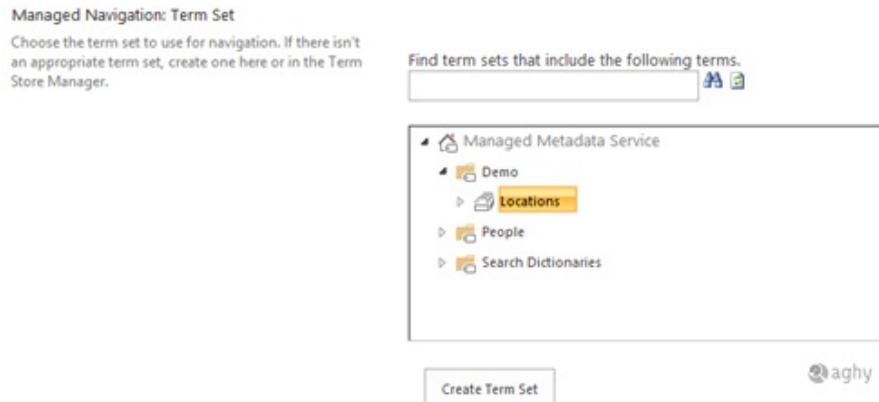
- On the tab "Intended Use", the following checkboxes have to get enabled:
 - "Available for Tagging"
 - "Use this Term Set for Site Navigation."
- Term-Driven Pages: Enter the path of your page create in the previous step (*/catalog/SitePages/Home.aspx*) or select with the *Browse* button.

Search configuration:

- Create the proper content source(s).
- Make sure you have created a Managed Property for your Managed Metadata, with the settings Queryable, Retrievable and Refinable enabled). Note its name (in my demo, it is DemoLocation).
- Run a Full Crawl.

Next, you have to edit the site's settings created in the first step (*/catalog*), to enable Metadata Navigation (in my example it is enabled for the Top Navigation, but it can be enabled for Quick Launch too).

1. Go to the Site Settings, open Navigation (in the group "Look and Feel").
2. For "Global Navigation", select "Managed Navigation".
3. Select the proper Term Set:



4. Select both checkboxes in "Managed Navigation: Default Page Settings": - "Add new pages to navigation automatically." - "Create friendly URLs for new pages automatically."
5. Save your settings.

As a result, you should see the Managed Navigation now, without showing any results, of course, but the URLs are expected to be as friendly as this:

<http://demo2013.aghy.hu/catalog/SitePages/Home.asp...>

The last step is to add the proper **Content Search Web Part** to your target page:

- Edit your page and click on "Add New Web Part".
- Select *Content Rollup / Content Search* Web Part and click on Add.
- Edit your Web Part settings:
 - Click on Change Query.
 - Click on "Switch to Advanced Mode" in the top-right corner.
 - In the "Select Query" dropdown, select the Result Source you want to use.
 - In the "Property Filter", select your Managed Property (created for your Term Set earlier). If you cannot see your Managed Property, click on "-- Show All Managed Properties--" first.
- Select "Contains" and "Site navigation terms of current page and subpages".

Build Your Query

BASICS REFINERS SORTING SETTINGS TEST

Switch to Quick Mode

Select a query
Choose what content you want to search by selecting a [result source](#).

All Results by Aghy (Service)

Keyword filter
Query from the search box

Add keyword filter

Property filter
DemoLocation

Contains

Site navigation terms of cu

Add prop aghy

Query text

- Click on "Add property filter".

Save your settings. Now, you should get the proper search results displayed.

Note: by default, the display of the results are gruesome here. Creating a better look and feel, you should play with the Display Templates. In my demo, I use the following additional settings of the Content Search Web Part:

- Properties / Display Templates / Item: *Two lines*
- Uncheck the "*Don't show anything when there are no results*" checkbox.
- Properties / Property Mappings / *Change the mapping of managed properties.*
 - Link URL: *Path*
 - Line 1: *Title*
 - Line 2: *Path*

Of course, you can achieve some advanced formatting with creating your custom Display Template for Item.



Thank you for reading this mini-guide!

Question? Feedback? Please don't hesitate to let me know.

E-mail: Agnes.Molnar@SearchExplained.com