



Smart Search

Administrator Guide

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Company information:

Email: info@vitextra.com

Website: vitextra.com

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1. Glossary

Product/Solution

Employee Smart Search Web Part for SharePoint Online.

Classic SharePoint UI

User interface (UI) that is available in SharePoint 2013/2016/2019/Online. Classic UI based on server-side rendering.

Managed Property

A Managed property in the SharePoint search schema defines what data from crawled properties are included in the search index. Managed properties have a large number of settings to determine how the contents are shown in search results. Managed Properties may be referred to in search queries to specify which information you need to return.

Modern SharePoint UI

Modern SharePoint UI is available in SharePoint 2019 and SharePoint Online. Modern SharePoint UI is not compatible with Classic SharePoint UI. Server-side web parts and other UI extensions such as Ribbon Elements, User Controls not supported by Modern UI.

Search Schema

SharePoint Search Schema controls which data is available for search, how search results are presented on SharePoint Site. Search Schema contains Crawled and Managed Properties, Search Scopes, Content Sources, and other data to manage the search experience in your farm or tenant.

SharePoint App Catalog

A special SharePoint site collection to store SharePoint and Office applications to make them available within the web application where the App Catalog is configured.

Web Part

A Web Part is a functionality that can be added one or more times to a page. Web parts built on SharePoint Framework can also be extended as tabs in Microsoft Teams.

2. Introduction

The Smart Search web part makes it possible to set up a custom configurable search page within SharePoint Online and build other search-driven solutions.

The web part is based on the Microsoft SharePoint Framework (SPFx) and designed for use in SharePoint modern UI. Classic SharePoint UI, as well as the on-premise installation, is not supported.

Important

Smart Search web part does not support SharePoint on-premise environment.

3. Document Information

3.1 Objectives

The document's primary purpose is to describe the product and provide necessary information to install, set up, and activate the solution within SharePoint Online environment. The paper describes the product's core features and services used by the product.

This document does not cover full features overview of the Smart Search web part.

3.2 Audience

This document is intended for SharePoint Online administrators and does not contain information about the use of the product by end-users.

3.3 Document Overview

The document is divided into subsections:

- **Product description** provides information about the product and its core features;
- **Installation** describes the installation and activation process of the product;
- **Uninstalling** describes the process of removing the solution from a tenant;
- **Questions & Answers** contains answers to the most frequently asked questions.

4. Product Description

Vitextra Smart Search allows users to quickly find relative documents, list items, videos, photos, and other content within the corporate portal, including shared files located in personal OneDrive folders.

4.1 Localization

Smart Search supports UI languages listed below.

English Name	Native Name	Code
English (United States)	English (United States)	en-us
Latvian (Latvia)	latviešu (Latvija)	lv-lv
Russian (Russia)	русский (Россия)	ru-ru
Spanish (Spain, International Sort)	español (España, alfabetización internacional)	es-es

4.2 Single or multiple source mode

The web part supports two modes of operation:

- **Single Source.** Users can search within the single selected scope.
- **Multiple Sources (Tab).** Users can switch between available scopes.

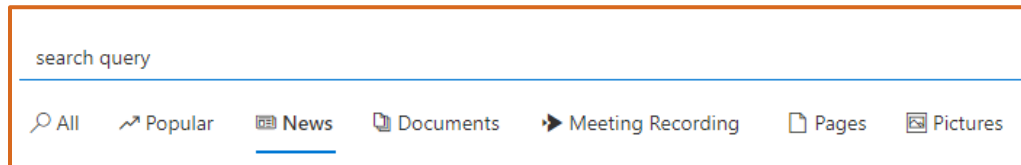


Figure 1. Multiple sources mode operation of the web part

4.3 Result Sources

The Smart Search provides ten predefined search sources (scopes):

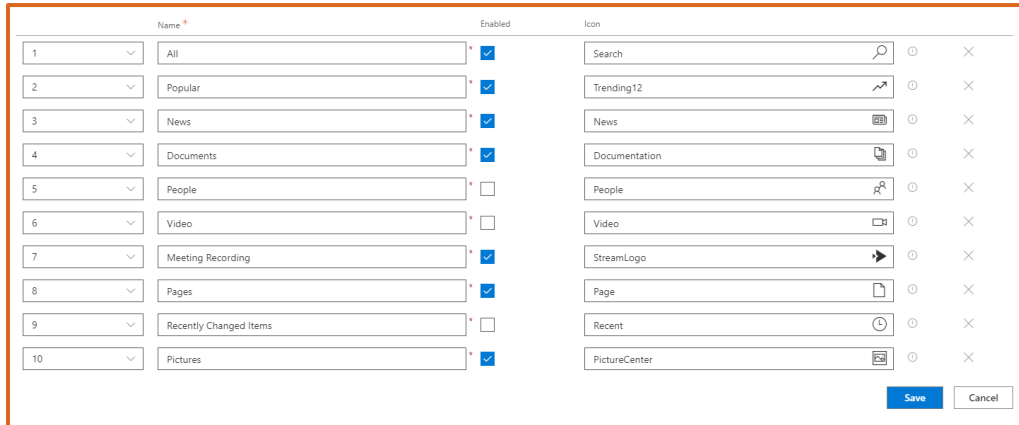
- **All.** Search all items with no filtering;
- **Popular.** Most popular items across SharePoint sites and personal OneDrive;
- **News.** Modern news pages;¹
- **Documents.** Search within files located in document libraries and OneDrive;
- **People.** Search within SharePoint user profiles;
- **Video.** Search video files (.avi, .mp4, .wmv and others);
- **Meeting Recording.** Search Microsoft Teams meeting recording;
- **Pages.** Search modern and classic SharePoint pages;
- **Recently Created Items.** Search items recently created by users;
- **Pictures.** Search images and other graphical content.

Note

Custom search sources as well as changing the behavior of the predefined search sources not supported.

¹ Modern SharePoint-based news feed that content managers can spread across various channels such as SharePoint Home page, Team sites, Microsoft Teams, SharePoint Mobile App, and others.

You can choose sources available for end-users to use and switch between.



	Name *	Enabled	Icon
1	All	<input checked="" type="checkbox"/>	Search
2	Popular	<input checked="" type="checkbox"/>	Trending12
3	News	<input checked="" type="checkbox"/>	News
4	Documents	<input checked="" type="checkbox"/>	Documentation
5	People	<input type="checkbox"/>	People
6	Video	<input type="checkbox"/>	Video
7	Meeting Recording	<input checked="" type="checkbox"/>	StreamLogo
8	Pages	<input checked="" type="checkbox"/>	Page
9	Recently Changed Items	<input type="checkbox"/>	Recent
10	Pictures	<input checked="" type="checkbox"/>	PictureCenter

Figure 2. Configuration of result sources

For each result source, you can set the following settings:

- Order of the source
- Name of the search source
- The icon displayed to the left of the source name

4.4 Appearance

The web part supports listed in the table below options to change its appearance:

Option	Type	Description
Display Search Box	Boolean	Display or hide search box
Default Search Query	String	Predefined search query ²
Enable Paging	Boolean	Show/hide pagination at the bottom of search results.
Page Size	Number From 5 to 20	Number of records displayed per page

² If the search box is hidden the predefined search query is used to retrieve data from search index.

Show Total Count	Boolean	Show/hide total number of search results ³
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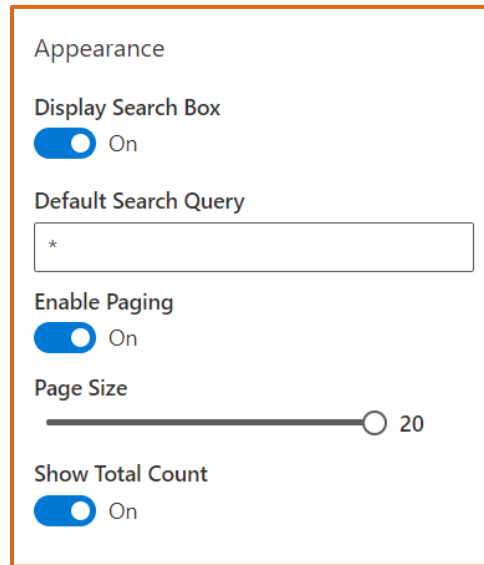


Figure 3. Appearance settings of the Smart Search

4.5 Filtering

The filtering section allows you to enable the refinement panel and choose refiners displayed under the search box.

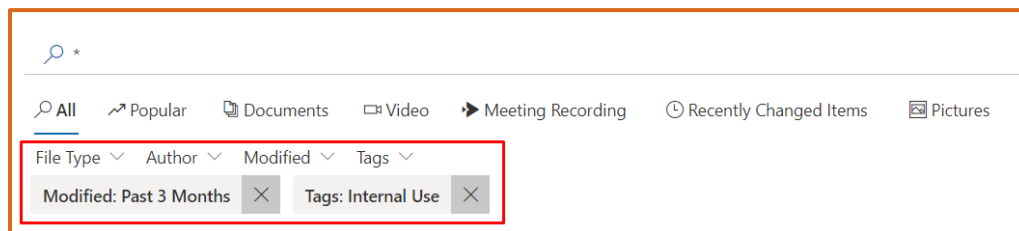


Figure 4. Filtering panel

Smart Search provides listed in the table below options to set up filtering:

³ Count returned by SharePoint search service may be inaccurate.

Option	Type	Description
Show Filters	Boolean	Show/hide refinement panel under the search box
Refiners	Collection of refiners	Refiners available to refine search results by the end-users

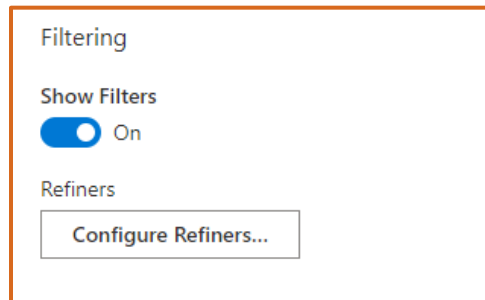


Figure 5. Filtering settings of the web part

You can choose properties which available to refine the search results, as well as the format of their display:

- Display name of the property
- Show/Hide total count
- Sort by name/count
- Direction of sorting

Refiner	Display Name *	Enabled	Show Count	Sort By *	Sort Direction *
1	BaseOfficeLocation Office Location *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
2	Department Department *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
3	SPContentType Content Type *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
4	FileType File Type *	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
5	DisplayAuthor Author *	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
6	Created Created *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
7	Write Modified *	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
8	ItemCategory ItemCategory *	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending
9	Tags Tags *	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Ascending

Figure 6. List of refiners

Note

Custom refiners not supported by the web part

4.6 Sorting

Smart Search supports the following properties to sort the search results by:

- Relevance Rank
- Last Modified
- File Size

If Sorting is disabled, the web part sorts results by rank in descending order.

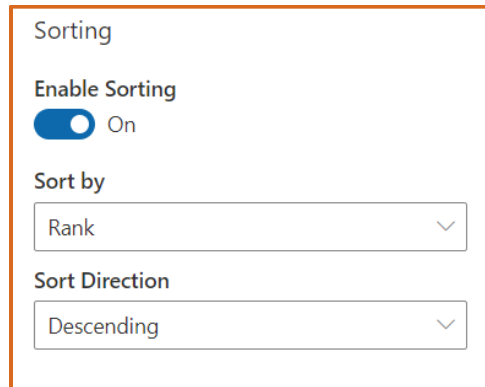


Figure 7. Sorting settings of the web part

4.7 Items Layout

Smart Search uses up to twelve layout elements to display information about the search result.

- **Icon.** Displays the icon according to the search result type;
- **Title.** Displays item title or file name. It's a hyperlink to the document;
- **Path.** Breadcrumbs are leading to the document location. Contains links to the site and the folder or document library (list) where the document is located;
- **File Size.** Displays file size in human-readable format (KB, MB, ...);
- **Links Count.** Displays number of incoming links to the document;
- **Thumbnail.** Preview of the document (if applicable);
- **Tags.** Displays all taxonomy tags assigned to the document. Users can select tag to quickly filtering search results;
- **Last Modified.** Displays person who last modified the document and date time in relative format;
- **Views.** Number lifetime views of the document;
- **Summary.** Displays summary. You can change the length of the summary in the web part settings.

 **Tip**

Smart Search uses a summary to parse attendees of recorded meetings. Increase the length of the summary to display all people who attended the meeting.

- **Analytics.** Sparkline is showing up a count of views and unique viewers for the last seven days.
- **Action Buttons**⁴. Quick actions available depending on the document type:
 - Download
 - Preview
 - Play

You can show or hide each of these elements except the title. The title element always shows up.

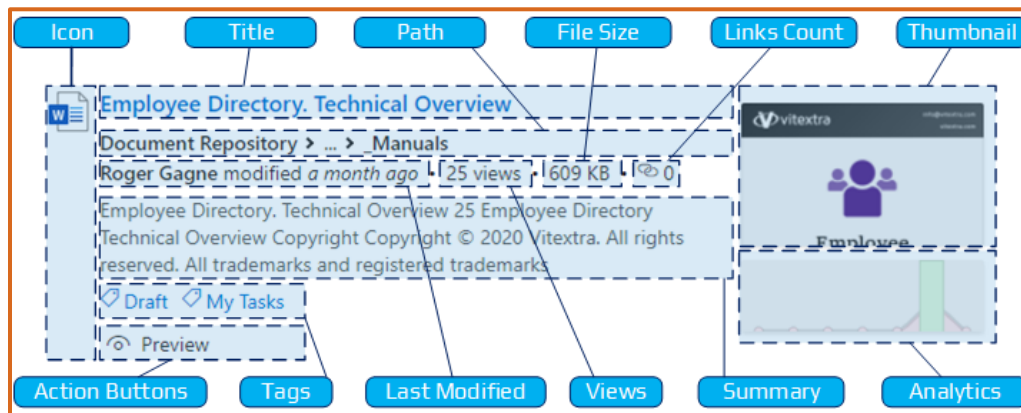


Figure 8. Search result elements layout

4.8 Item Actions

Smart Search supports three types of quick actions, which are available for end-users and make it possible to interact with search results keeping the context and prevent switching to other windows or tabs:

⁴ See Item Actions for more details.

Download

Allows users to download the document instead of open it in a new window. Available for document content types.

Preview

Allows users to preview Microsoft Office documents in the dialog window.

Play

Allows users to open a video player in the dialog window. Available only for video content type.

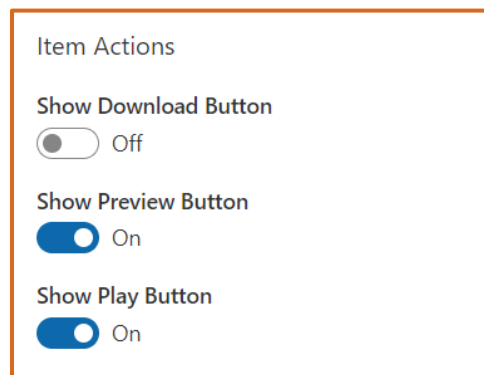


Figure 9. Item Actions settings of the web part

4.9 Behavior

The additional configuration section is designed to manage the behavior of search query processing and contains the following options:

Trim Duplicates

If selected, duplicate items will be removed from the search results.

Enable Stemming

The stemming feature makes it possible to perform a search for words that share the same stem.

If this option is enabled, a search term like “Record” matches against “Recording”, “Recorded”, and other words with the same stem.

Enable Nick Names

Specifies whether nicknames are used to find matches with a search term.

Enable Phonetic

If enabled, the search service uses phonetic forms of the search terms to find matches.

For example, if a user performs a search by query “Tompson”, phonetic forms like “Thompson” are used to find matches.

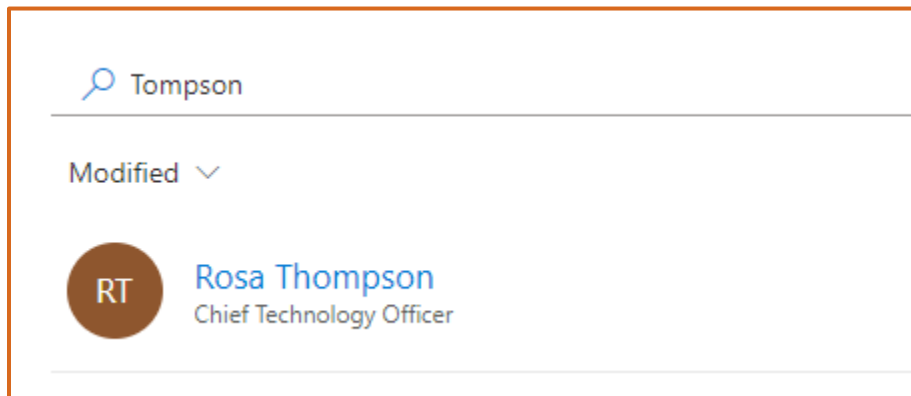


Figure 10. Searching with enabled phonetic

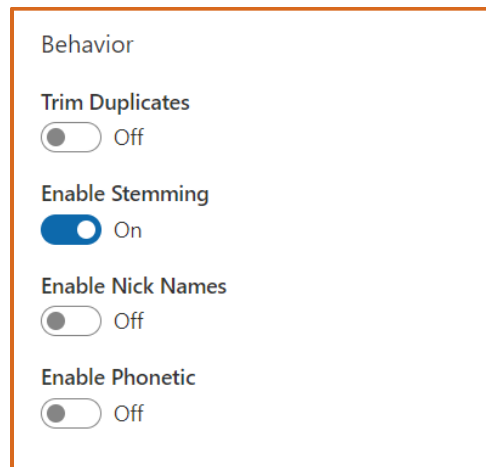


Figure 11. Behavior settings of the web part

5. Installation

5.1 Required Permissions

To install the Smart Search web part, you must have the Tenant Admin role assigned to you.

5.2 Software Requirements

Smart Search is designed to deploy on Microsoft 365 environment. There is no special software or system requirements.

For end-users, the following browsers are supported: Microsoft Edge, Safari, Chrome, or Firefox.

5.3 API Permissions

Smart Search does not require API permissions. The product uses a native SharePoint search service to retrieve and display data.

5.4 Product Package

The installation package of the Smart Search that is available on the download center (<https://vitextra.com/en/downloads>) contains a single package:

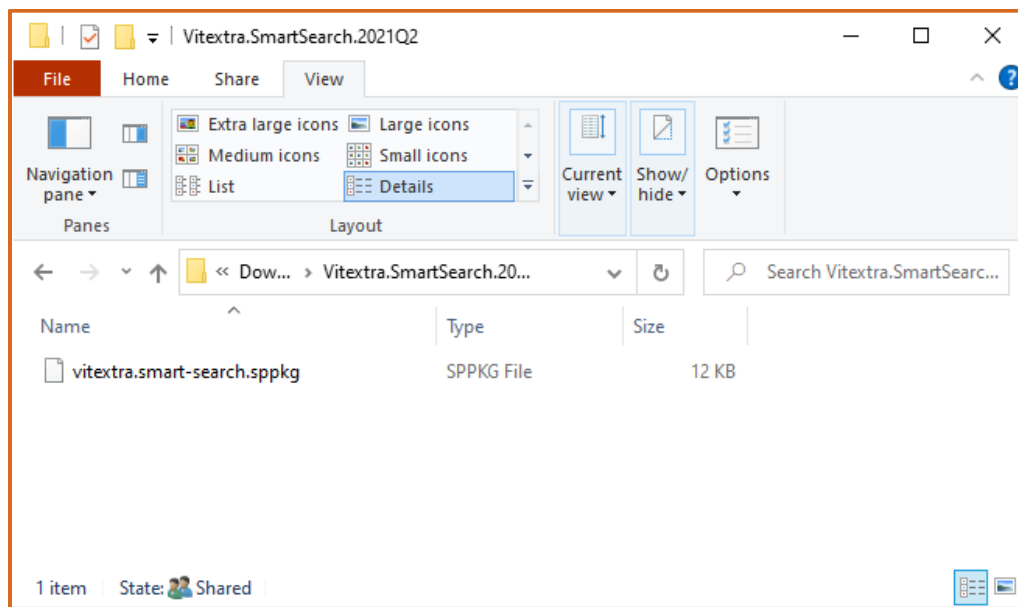


Figure 12. Installation package

5.5 Deploy Smart Search solution

1. Extract downloaded installation package.
2. From Microsoft 365 admin center, go to SharePoint Admin Center. Select More Features and click the Open button under the Apps heading:

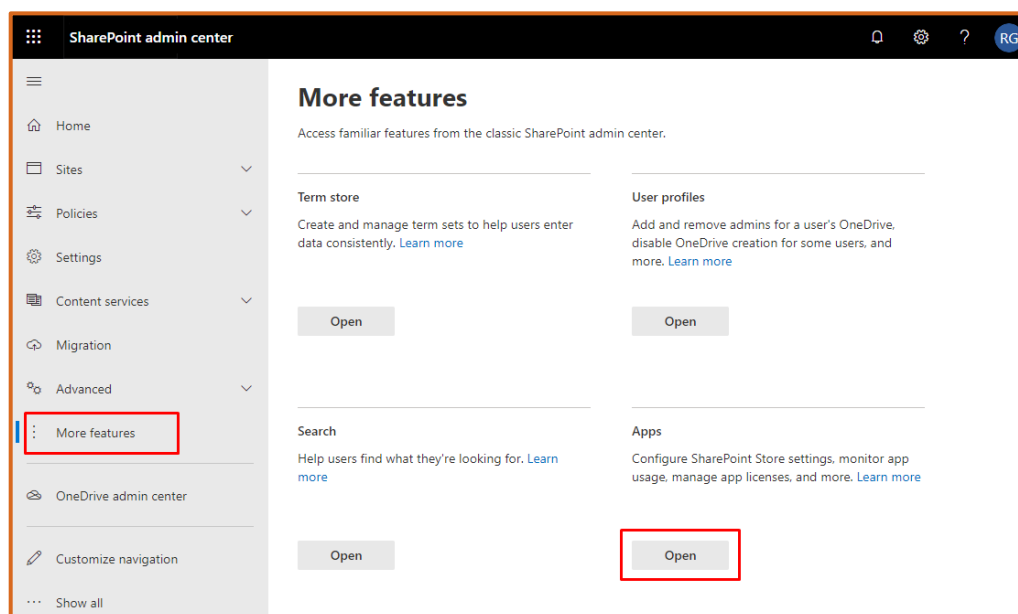


Figure 13. SharePoint Admin Center

3. Select App Catalog

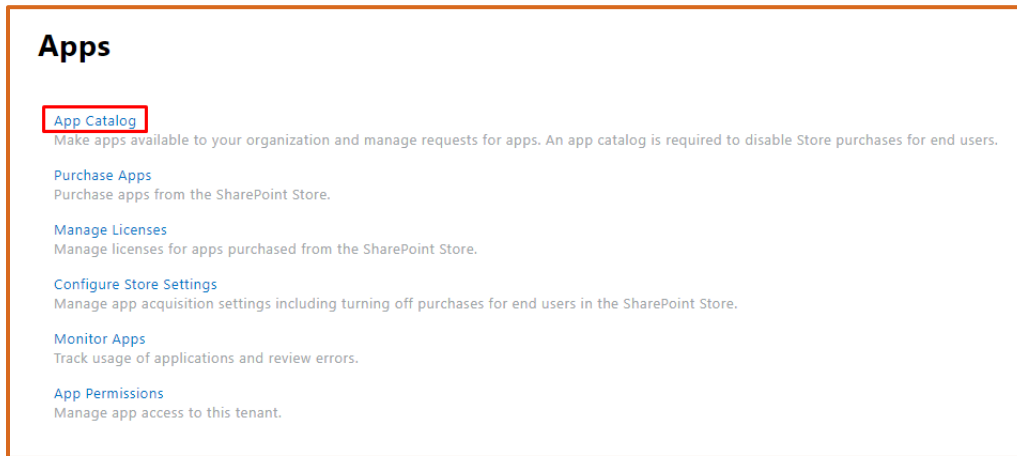


Figure 14. SharePoint Apps Settings

4. Select Apps for SharePoint:

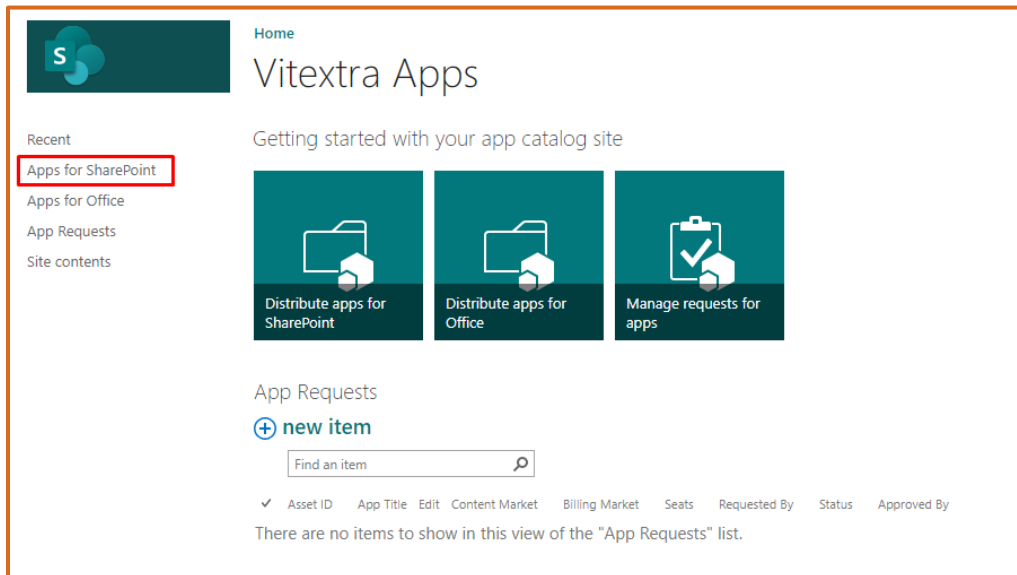


Figure 15. SharePoint App Catalog

5. Upload extracted package to the Apps library:

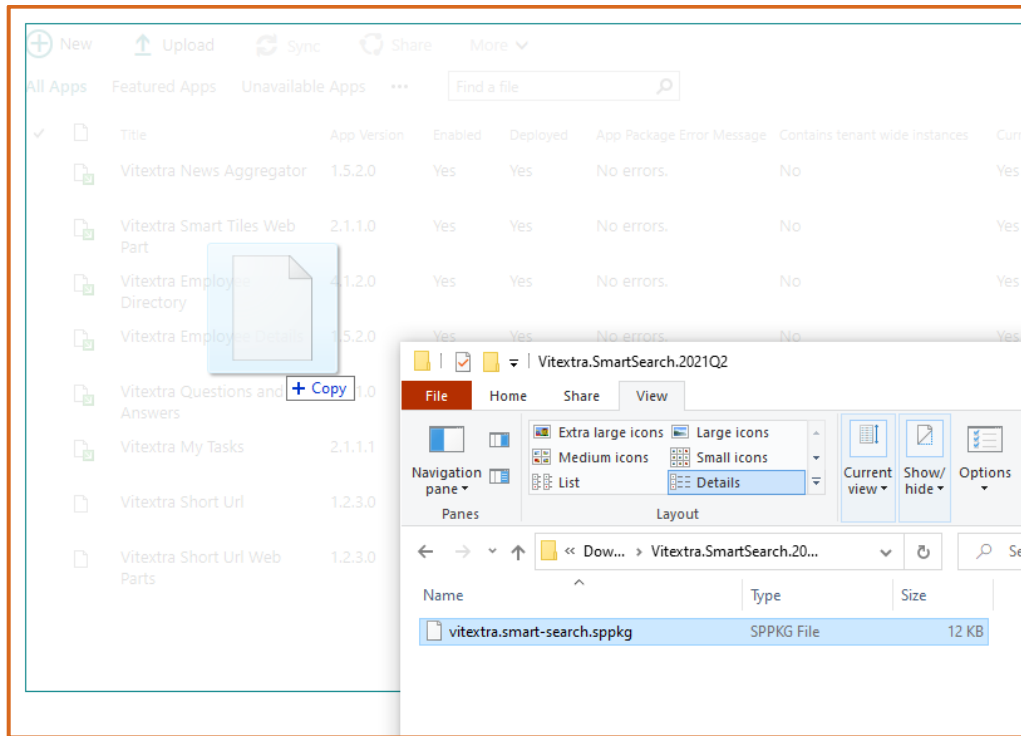


Figure 16. Uploading package to the App Catalog

After uploading the package to the app catalog, select the Deploy button to confirm the operation.

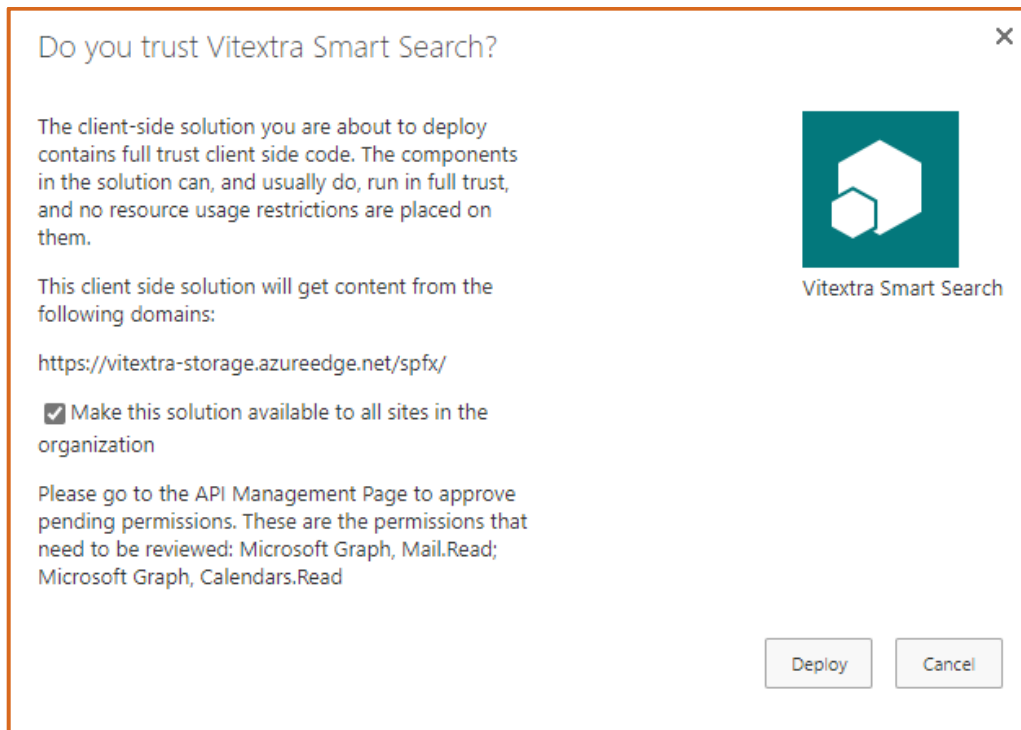


Figure 17. Package deploy confirmation

Once the package is deployed, the web part is available to use on a SharePoint site immediately.

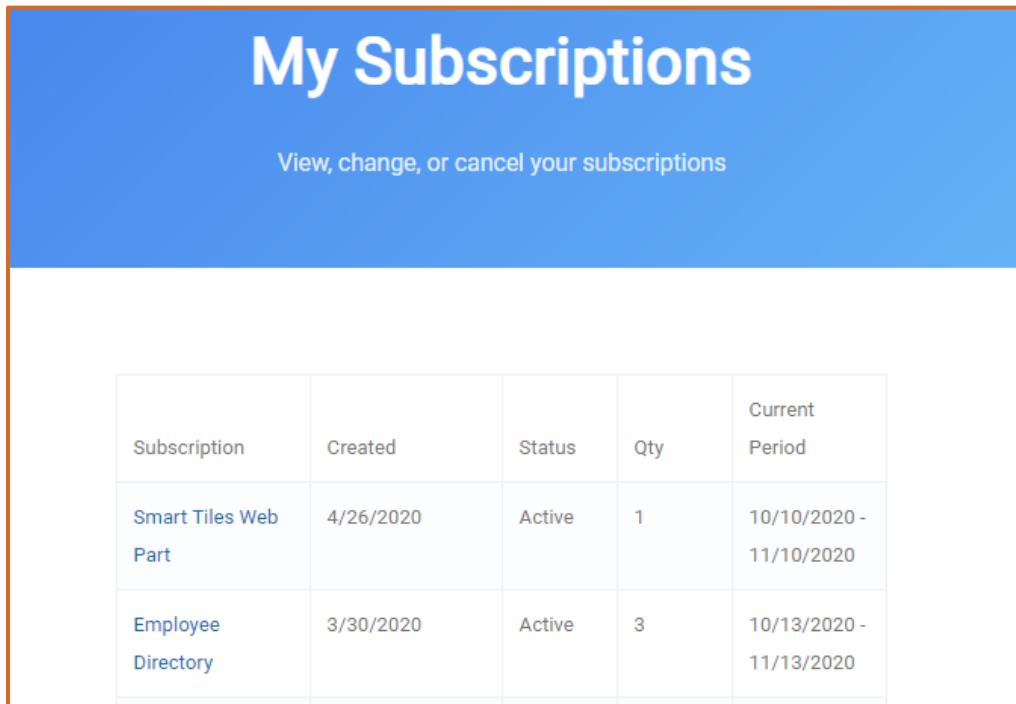
6. Product Activation

The free 14-day trial period starts automatically once the solution is deployed. Product activation is required to keep the product working after the trial period ends.

The activation process requires you have purchased the product and available license.

To activate the Smart Search:

1. Open the [My Subscriptions](#) page on the vitextra.com website and sign in with your account to view the list of your active subscriptions.



The screenshot shows the 'My Subscriptions' page with a blue header and a table of subscriptions. The table has five columns: Subscription, Created, Status, Qty, and Current Period. There are two rows of data.

Subscription	Created	Status	Qty	Current Period
Smart Tiles Web Part	4/26/2020	Active	1	10/10/2020 - 11/10/2020
Employee Directory	3/30/2020	Active	3	10/13/2020 - 11/13/2020

Figure 8. List of Subscriptions

2. Select **Smart Search** in the list to view detailed information about the subscription.
3. Select **Assign License** button:

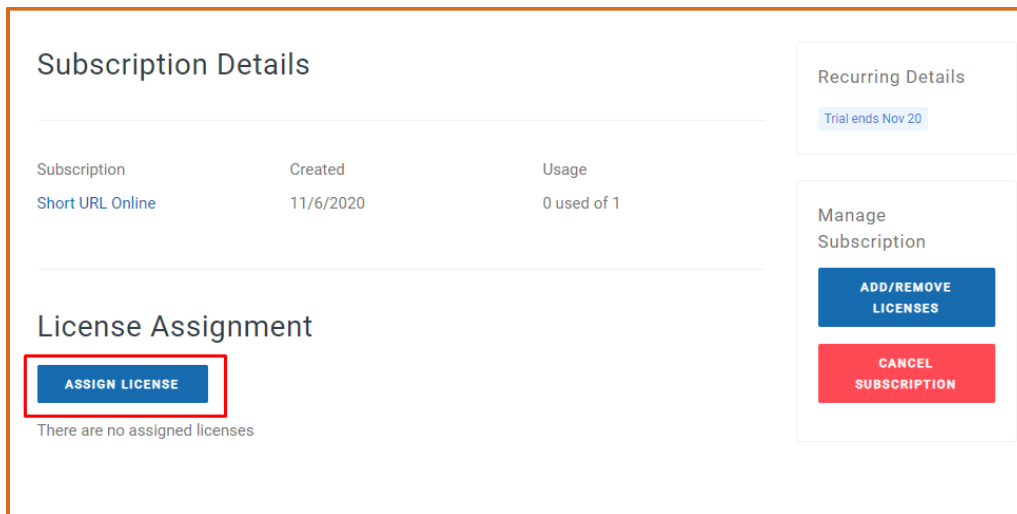


Figure 9. Subscription Details

4. In the dialog, type-in name of your environment and identifier of your tenant⁵ and select **Submit**.

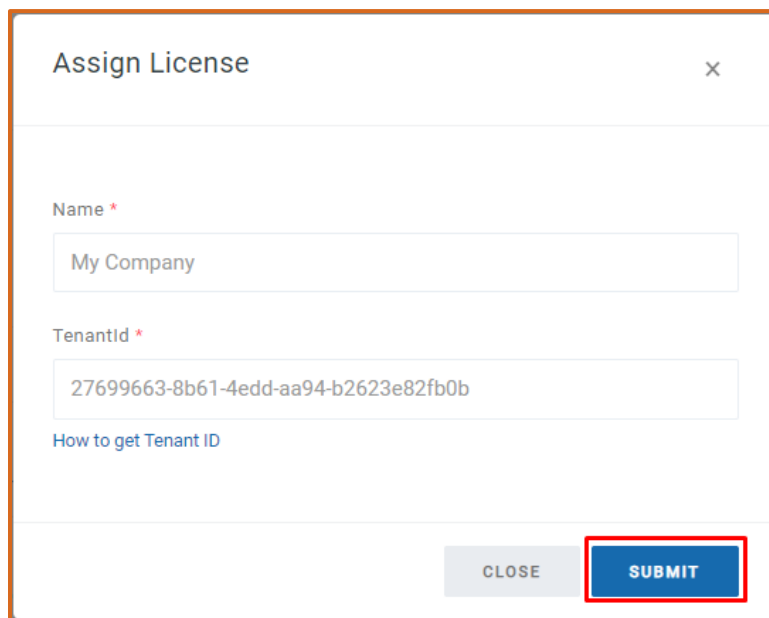


Figure 18. Assign License Dialog

⁵ See [How to find your Office 365 Tenant ID](#) article in Vitextra knowledgebase

If activation has been successful, the product automatically changes the status to **Activated**.

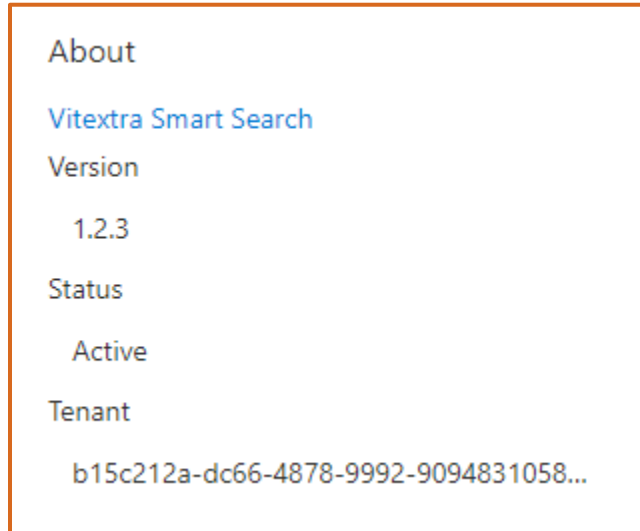


Figure 19. Status of Smart Search web part

7. Uninstalling

To uninstall Smart Search:

1. Open SharePoint App Catalog
2. Select Smart Search solution and click the **Delete Document** button on the ribbon:

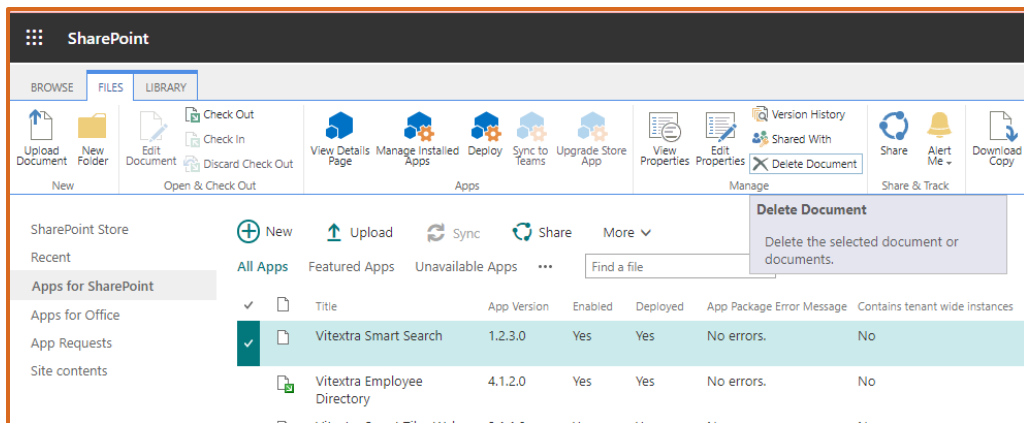


Figure 20. Removing Smart Search solution from App Catalog

3. Confirm operation

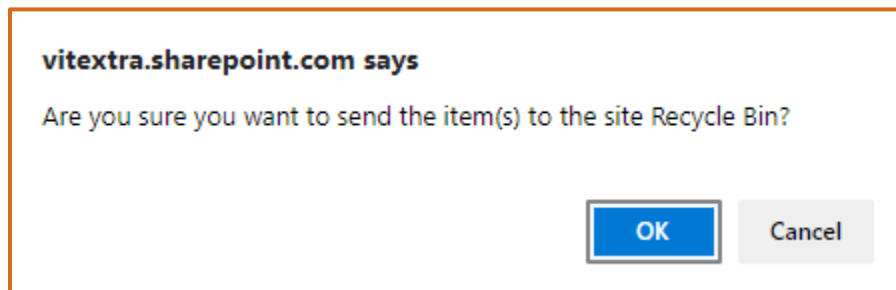


Figure 21. Confirmation of removing the solution

8. Frequently Asked Questions

Is it possible to replace the built-in SharePoint search with this solution?

Yes. You can set up a custom search page and use the Smart Search web part to display search results. See Custom Search Page for SharePoint Online article for more information.

May users who do not have permissions for particular documents see them in the search results?

No. The Smart Search uses a built-in SharePoint Search Service. The Search Service trims search results at query time based on current user permissions.

Is it possible to add a custom search source?

No. As for now, the Smart Search does not support custom search sources.

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External Links

Custom Search Page for SharePoint Online

<https://vitextra.com/en/support/kb/10058>

Search Recorded Teams Meetings stored in OneDrive

<https://vitextra.com/en/support/kb/10059>

Update Vitextra SharePoint Online Application

<https://vitextra.com/en/support/kb/10050>

Manage Subscription for Vitextra Online Products

<https://vitextra.com/en/support/kb/10037>

How to find your Office 365 Tenant ID

<https://vitextra.com/en/support/kb/10034>

Installing Cloud-based Product

<https://vitextra.com/en/support/kb/10035>

Create and share news on your SharePoint sites

<https://support.microsoft.com/en-us/office/create-and-share-news-on-your-sharepoint-sites-495f8f1a-3bef-4045-b33a-55e5abe7aed7>