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Set Up a Federated Result Source for SharePoint 2013

By Jacqueline Mulcahy

Relevant to SharePoint 2013 (including Office 365)
Standard and Enterprise Editions

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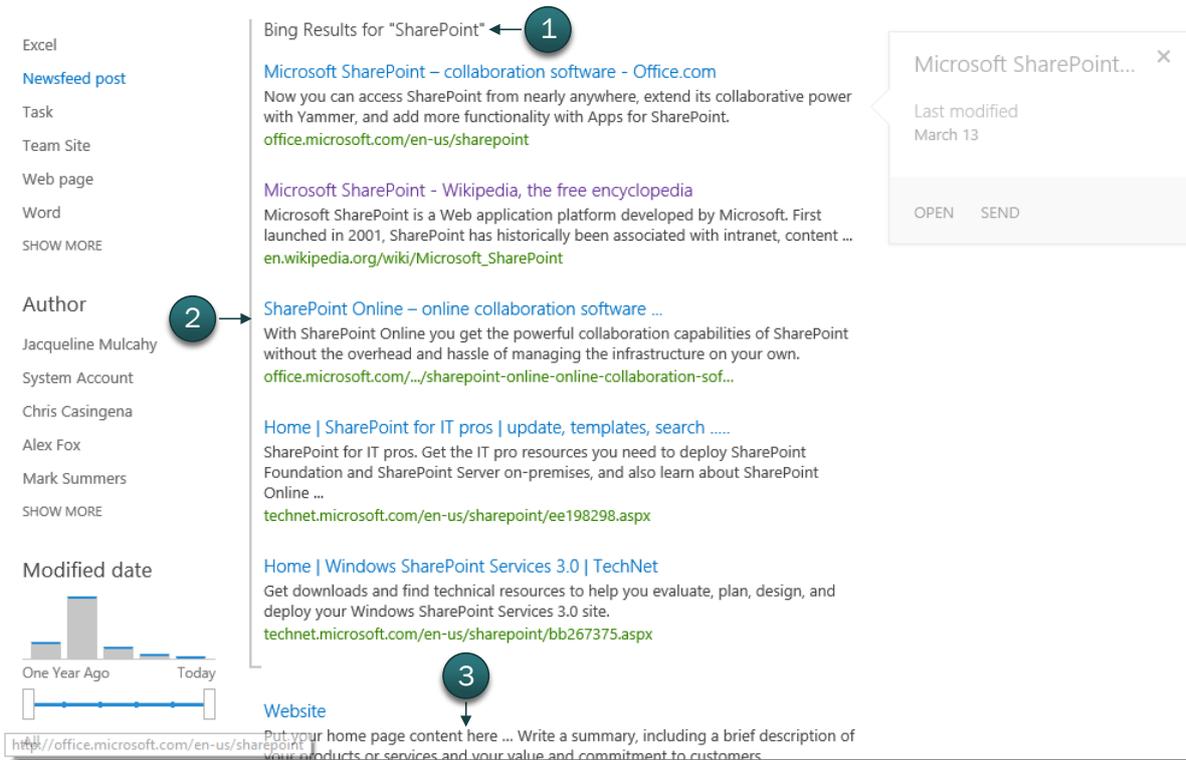
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What is a Federated Search?

Federated search allows you to use search indexes which are created by other search engines outside of SharePoint. The results are then formatted and displayed on the same search results page as the SharePoint search results or in a separate web part. This feature was available in SharePoint 2010 but is now much simpler to configure through the use of Result Sources, the Query Builder and Search Query Rules.

1. Returned search results from Bing.
2. This indicates a Result Block.
3. SharePoint's search results.

Result Sources

Result sources tell SharePoint where to look for results and the results can also be filtered using specific criteria. They were formerly known as Search Scopes. An example of a search scope is Documents, Conversations or People. You can change the source at the farm, site collection or site level and you can also define your own result sources.

Query Rules

Query Rules allow a site collection or site owner to add conditions so the results are dynamically reformulated to more closely match the intent of the search user. Search query rules can be aligned to one or more result sources to define the outcome of a search query. Each query rule has one or more conditions that must be met, actions that result when conditions are met, and publishing

options for when the query rule is active or inactive. One example for using a query rule would be when a user searches for 'sales figures,' a query rule could then alter the results so that the company's financial statements are displayed at the top of the results.

This white paper demonstrates the steps to take to set up a federated result source for a Bing search.
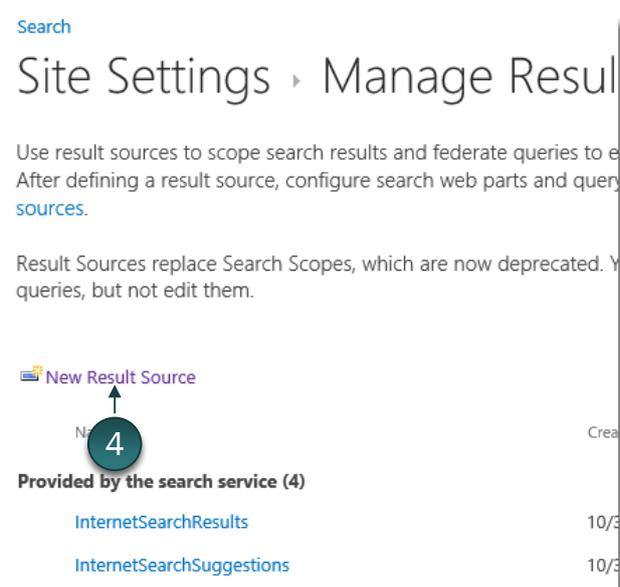
Create the Result Source

This must be done from the Search page of your site so you must first navigate there before completing the steps below, the URL may look something like this:

https://CompanyName.sharepoint.com/search

1. Click ⚙ to access the **Settings** menu.
2. Select **Site Settings**.
3. Under **Search** click on **Result Sources**.

Search
Result Sources ← ③
Result Types
Query Rules
Schema
Search Settings
Searchable columns
Search and offline availability
Configuration Import
Configuration Export

4. At the top of the sources page click **New Result** Source.

Search

Site Settings · Manage Resul

Use result sources to scope search results and federate queries to e
After defining a result source, configure search web parts and quer
sources.

Result Sources replace Search Scopes, which are now deprecated. Y
queries, but not edit them.

📑 New Result Source
                                                    ④

N   Crea

Provided by the search service (4)

    InternetSearchResults   10/3

    InternetSearchSuggestions   10/3

5. Under **General Information** add a **Name** and **Description**.
6. Under **Protocol** select **Open Search 1.0/1.1**.

General Information

Names must be unique at each administrative level. For example, two result sources in a site cannot share a name, but one in a site and one provided by the site collection can.

Descriptions are shown as tooltips when selecting result sources in other configuration pages.

Name

Bing Federated Results

Description

Result source for a Bing search

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Protocol

Select Local SharePoint for results from the index of this Search Service.

Select OpenSearch 1.0/1.1 for results from a search engine that uses that protocol.

○ Local SharePoint
○ Remote SharePoint
⦿ OpenSearch 1.0/1.1
○ Exchange

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7. Leave the **Query Transform** field as is.
8. In the **Source URL** field enter the following Bing URL:
   http://www.bing.com/search?q={?searchterms}&format=rss&Market= en-Us Credentials.
9. Leave the **Credentials Information** set to **Anonymous**.

Query Transform

Change incoming queries to use this new query text instead. Include the incoming query in the new text by using the query variable "{searchTerms}".

Use this to scope results. For example, to only return OneNote items, set the new text to "{searchTerms} fileextension=one". Then, an incoming query "sharepoint" becomes "sharepoint fileextension=one". Launch the Query Builder for additional options.

{searchTerms}   Launch Query Builder

Learn more about query transforms.

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Source Url

Enter the URL of the OpenSearch source. Include the query in the URL by using the query variable "{searchTerms}", which will be automatically replaced with the query.

terms}&format=rss&Market=en-Us Credentials

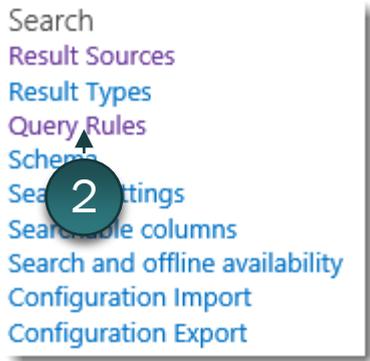**8**

Credentials Information

Select Default Authentication if users will connect to this source using the default SharePoint authentication.

9
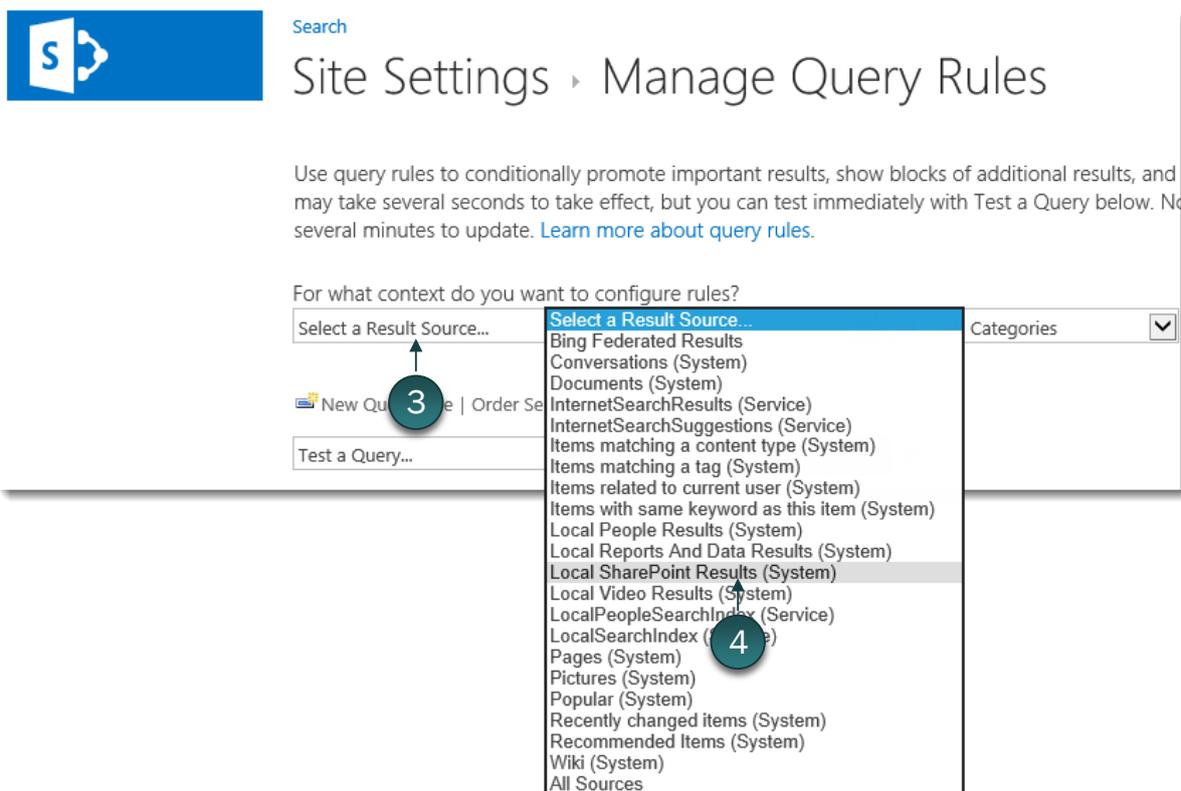
⦿ Anonymous: This source does not require authentication

Common:

10. Scroll to the bottom of the page and click **Save**.

Save

10

Create the Query Rule

1. If necessary navigate to the search page of your site and click ⚙ to select **Site Settings** from the **Settings** menu.
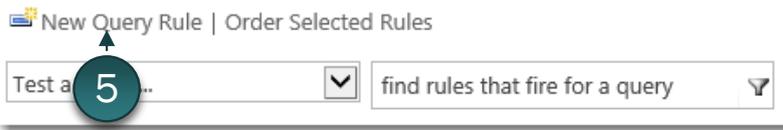2. Under **Search** click **Query Rules**.

Search
Result Sources
Result Types
Query Rules
Sche...
Sea... ...ttings
Sear... ...le columns
Search and offline availability
Configuration Import
Configuration Export

3. Click the drop down arrow next to **Select a Result Source**.
4. Select **Local SharePoint Results** from the menu.

Search

Site Settings › Manage Query Rules

Use query rules to conditionally promote important results, show blocks of additional results, and
may take several seconds to take effect, but you can test immediately with Test a Query below. N
several minutes to update. Learn more about query rules.

For what context do you want to configure rules?

Select a Result Source...   Categories

Select a Result Source...
Bing Federated Results
Conversations (System)
Documents (System)
New Qu... ...e | Order Se... InternetSearchResults (Service)
InternetSearchSuggestions (Service)
Test a Query... Items matching a content type (System)
Items matching a tag (System)
Items related to current user (System)
Items with same keyword as this item (System)
Local People Results (System)
Local Reports And Data Results (System)
Local SharePoint Results (System)
Local Video Results (System)
LocalPeopleSearchIndex (Service)
LocalSearchIndex (...e)
Pages (System)
Pictures (System)
Popular (System)
Recently changed items (System)
Recommended Items (System)
Wiki (System)
All Sources

This allows the query to return results from SharePoint as well.

5. Click **New Query Rule.**

6. Enter a **Rule name**.
7. Under **Query Conditions** click **Remove Condition**.

This means the query rule will fire on all searches.

Create the Result Block

1. In the **Actions** area click on **Add a Result Block**.

2. In the **Block Title** area change the title to something meaningful like *Bing Results for "{subjectTerms}".*
3. Click the drop down menu under **Search this source** and select the result source you created earlier e.g.**Bing Federated Results**.
4. Change the **Items** drop down menu to the number of results you wish to display e.g. 5.**.**
5. Expand **Settings.**
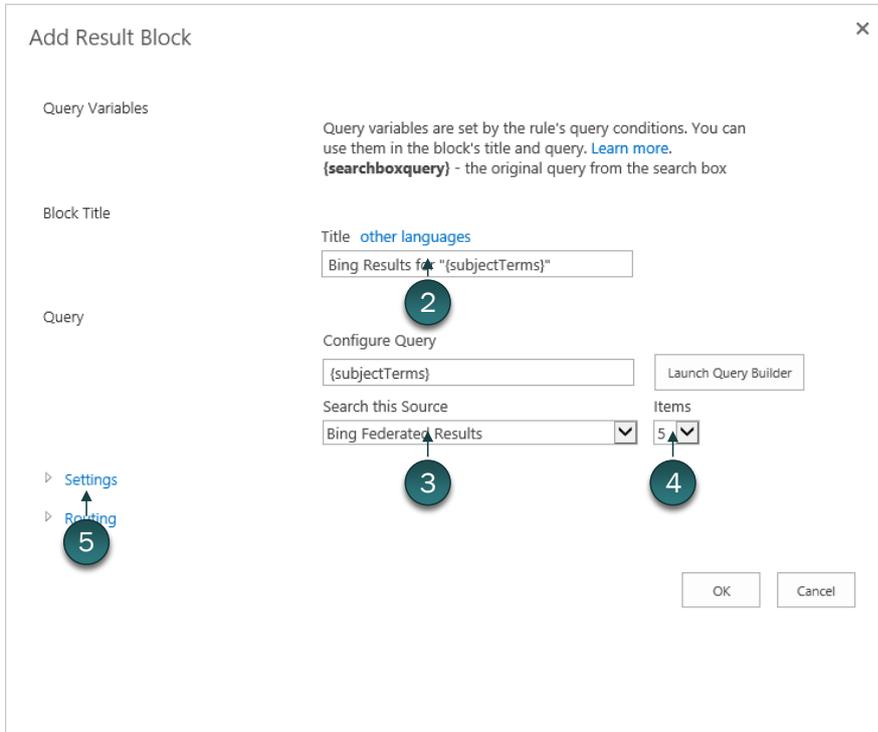
6. Select **This block is always shown above the core results**.
7. Click **OK** to complete.
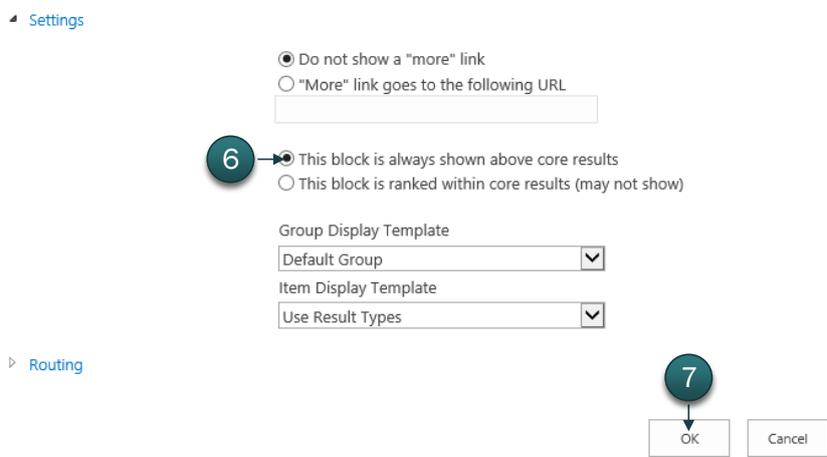
This will display our block of Bing results above the SharePoint results, like a promoted result.

8. On the **Add Query Rule** page click **Save**.

Save ← 8

9. Check your Query Rule is displayed under **Defined for this site**.

Name	Modified	Conditions	Actions
Defined for this site (3)			
Bing Results Enterprise users only	3/20/2014	On Result Source Local SharePoint Results	Add Promoted Result Blocks Bing Results for "{subjectTerms}"
Reports and Data		...anced Query Text Match	Add Ranked Result Blocks

9

Test your new query and result source by carrying out a search the Bing Results are displayed above the SharePoint results and the Result Block is indicated with a square bracket to the left of the block.
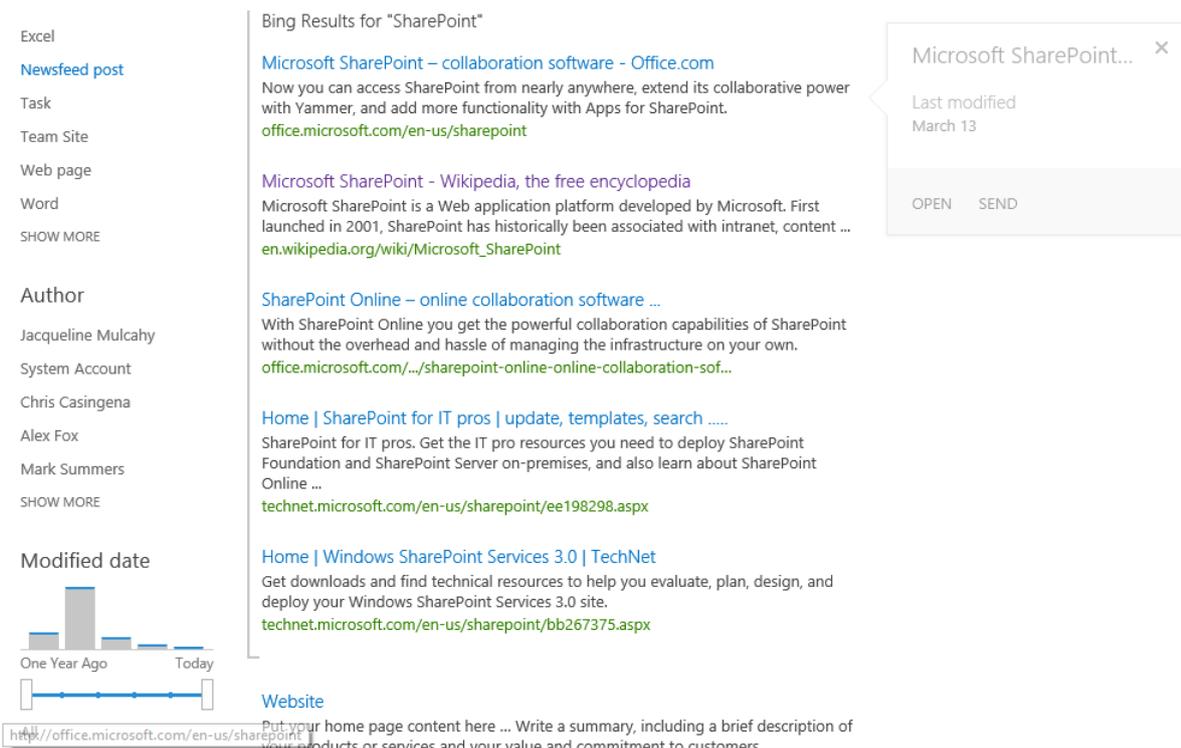
Excel

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Task

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Web page

Word

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System Account

Chris Casingena

Alex Fox

Mark Summers

SHOW MORE

Modified date

One Year Ago   Today

http://office.microsoft.com/en-us/sharepoint

Bing Results for "SharePoint"

Microsoft SharePoint – collaboration software - Office.com
Now you can access SharePoint from nearly anywhere, extend its collaborative power with Yammer, and add more functionality with Apps for SharePoint.
office.microsoft.com/en-us/sharepoint

Microsoft SharePoint - Wikipedia, the free encyclopedia
Microsoft SharePoint is a Web application platform developed by Microsoft. First launched in 2001, SharePoint has historically been associated with intranet, content ...
en.wikipedia.org/wiki/Microsoft_SharePoint

SharePoint Online – online collaboration software ...
With SharePoint Online you get the powerful collaboration capabilities of SharePoint without the overhead and hassle of managing the infrastructure on your own.
office.microsoft.com/.../sharepoint-online-online-collaboration-sof...

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Website
Put your home page content here ... Write a summary, including a brief description of your products or services and your value and commitment to customers.

Microsoft SharePoint...   ×

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