## Weill Cornell Medicine

# Improving Drupal search experience with Apache Solr and Elasticsearch



#### **About Us**

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#### What is search engine and why we use it?

Search engine in Drupal

What are the differences from Drupal Search API?

Why we use it?



#### What is Solr?

Solr is a super fast, open source, standalone search server built on Apache Lucene.

#### Some of the features are:

- Advanced Full-Text Search
- Designed for High Volume traffic
- Faceted Search and Filtering
- Scalable, flexible, extensible
- Rich Document Parsing built-in ability to index PDF's, Word documents and more
- Multiple search indexes
- Query Suggestions, Spelling and More advanced capability for auto-complete, spell checking, highlighting and more

### **Apache Solr Configuration**

- Install module
- Create an index on Solr engine
- Create a view
- Attach facet filters



#### Install the Drupal modules

In Drupal 8, Composer is used to manage PHP libraries. The Search API module doesn't include Solarium, so dependencies need to be set via Composer with the following commands:

\$ composer config repositories.drupal composer https://packages.drupal.org/8

Download the module Search API Solr Search.

\$ composer require drupal/search\_api\_solr

#### Install the following modules:

| Facets   | ► Faceted search interfaces that can be used on Search API sea |
|--|--|
| Search API                                     | ▶ Provides a generic framework for modules offering search c   |
| Solr search                                    | ► Offers an implementation of the Search API that uses an Apa  |
| <ul><li>Solr Search</li><li>Defaults</li></ul> | ► Enable this module for a best-practice default setup of Sear |

Optional: install Solr Search Defaults module

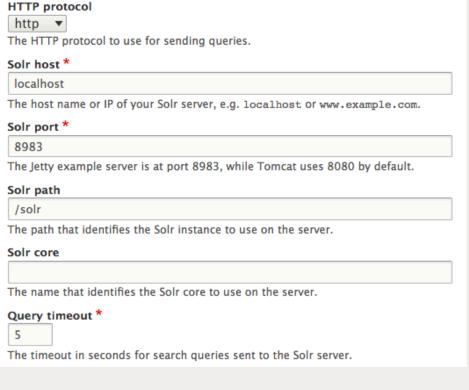
#### Add Solr server

Go to Configuration -> Search and metadata -> Search API.

Click "Add Server" and configure the Server.

Server name example: Local Solr Server





#### MULTI-SITE COMPATIBILITY

Retrieve results for this site only

Automatically filter all searches to only retrieve results from this [

By default a single Solr backend based Search API server is able to in results for this site only' below you have to ensure that you enable 'R

#### Confirm Solr server is connected

At this stage, the server's status page should show message:

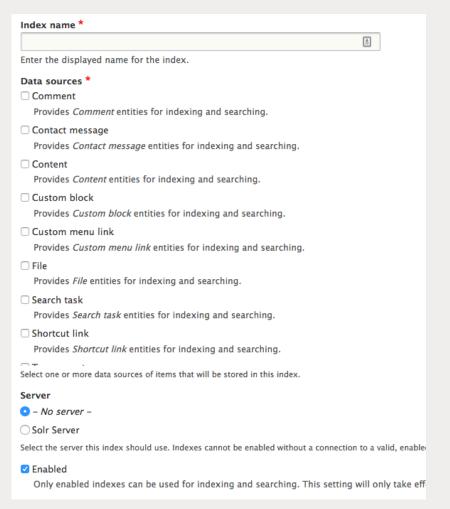
"The Solr server could be reached" and "The Solr core could be accessed"

| Solr server URI   | http://local.d8-solr.com:8983/solr/                          |
|-------------------|--|
| Solr core URI     | http://local.d8-solr.com:8983/solr/#/drupal                  |
| Server Connection | The Solr server could be reached.                            |
| Core Connection   | The Solr core could be accessed (latency: 2.45909555054 ms). |
|                   |  |

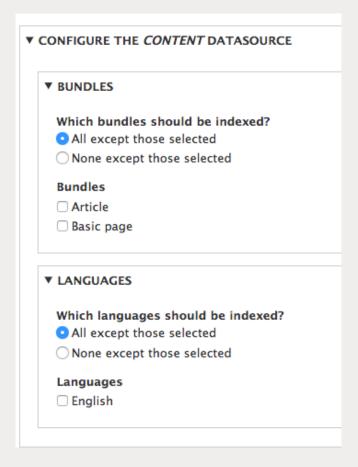
If Solr Search Defaults module was installed, it can be uninstalled as it's no longer required.

#### Add search index

Go to Configuration -> Search and metadata -> Search API. Click "Add Index"

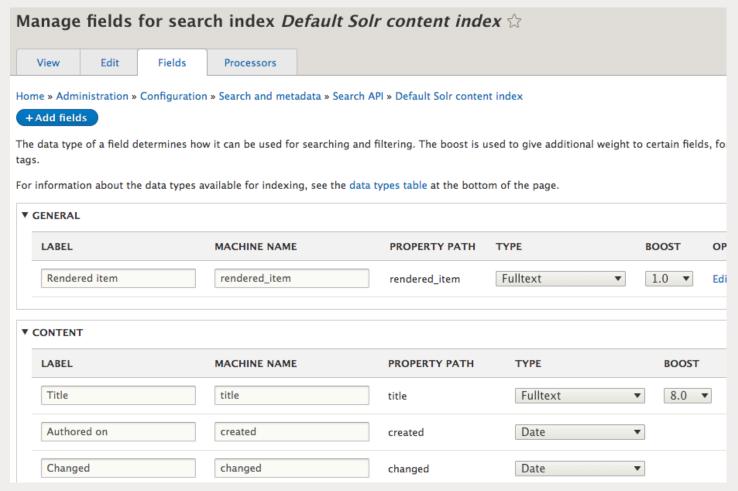


Selecting the "Content" data source, options are presented to select which bundles are to be indexed



#### Add fields to index

Before search can be performed, select all the fields that should be available to search. That is configured in the "Fields" tab.



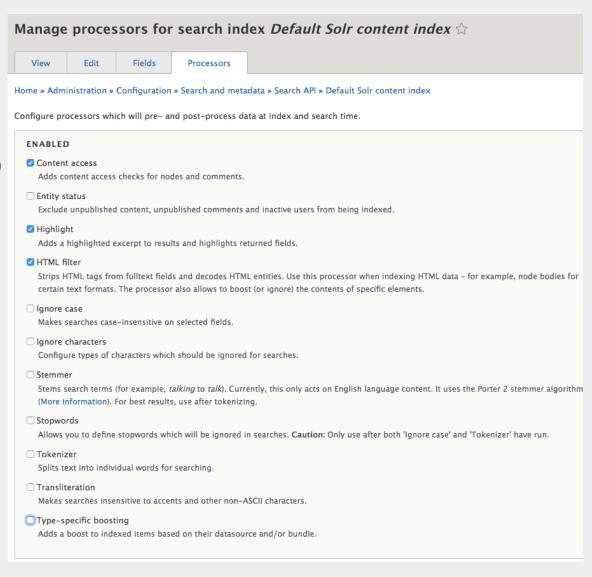
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#### Add processors to the index

Last step is to add additional 'processors'.

#### This includes items such as:

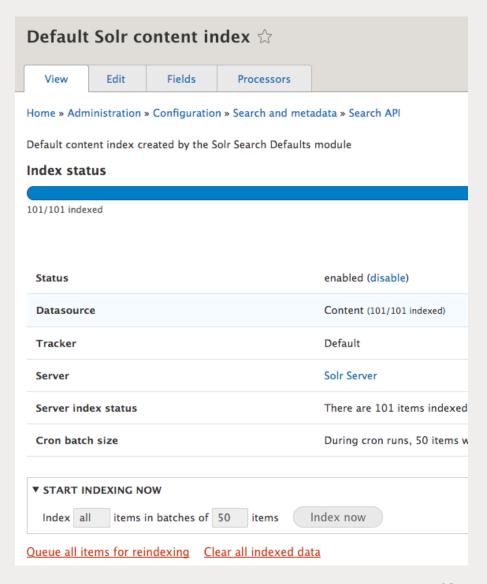
- Content access
- Ignore case (case-insensitive search)
- Tokenizer (split into individual words)



## Verify search index is working

Once fields and processors are setup, going back to the "View" tab, will show the status of the index, and at this point, the content is ready to be indexed if not already set to index immediately when the index is created.

Indexing of content is done via cron and any new content will get indexed then.



#### Create a Faceted Solr Search page

Final step is to create a search page. This is done by creating a View and create a Page.

General settings to configure:

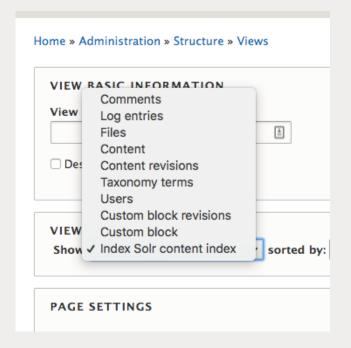
View Settings: Show > Index (created earlier)

Page Settings:

- Page Title
- Path: /search/content
- Display Format > Unformatted list of "Rendered Entity"

The click "Save and edit" to configure the view.

- 1. Under Format > Show, click "Settings" for Rendered Entity and change "view mode" to Teaser
- Under Filter Criteria, add "Fulltext search" field and expose the field for filtering



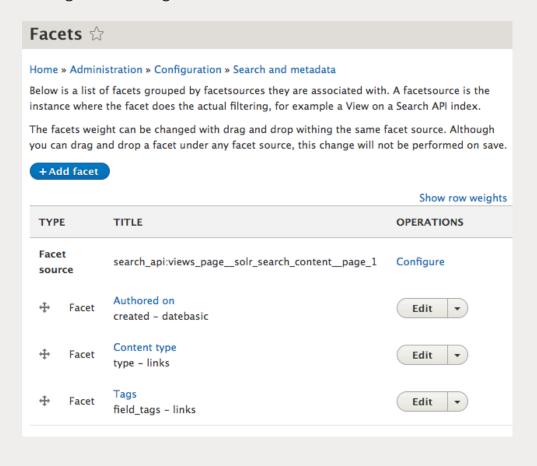
Further solr configuration can be done in the Solr schema, such as:

- Searching parts of works, using Solr's EdgeNGramFilterFactory, for example, "info" will match "information"
- Lower Case Tokenizer remove whitespace and non-letters and convert all letters to lowercase



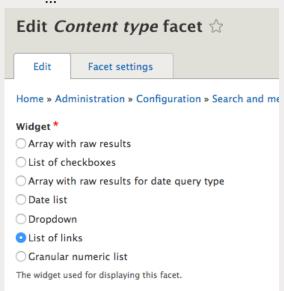
#### Add search facets

With the search page setup now, we want to add facets to let users filter down content. Navigate to Configuration > Search and metadata > Facets then click "Add facet"



Facets have a number of settings to configure:

- Widget
- Show the amount of results
- Sorting (by count, display value...)
- Operator (OR and AND AND filters are exclusive and narrow the result set. OR filters are inclusive and widen the result set.)



#### Add search facets

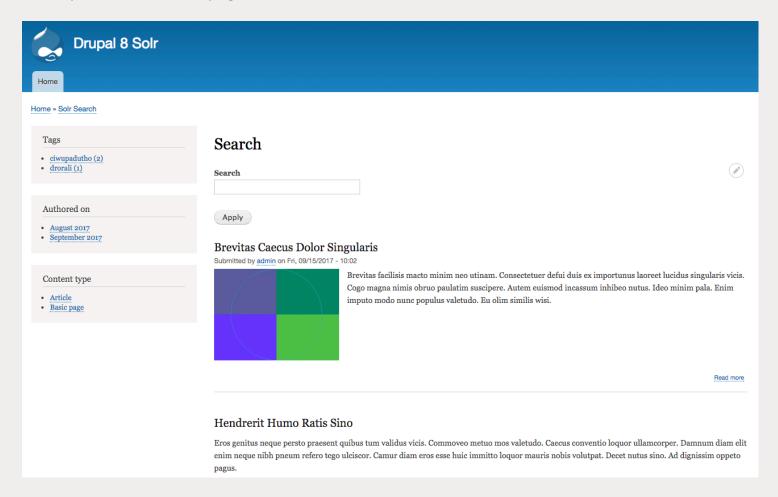
Last step, add the newly created Facet blocks on the Block Layout page



Note: Facet blocks don't need to have the page visibility set, it will automatically detect if the page a search page, otherwise, they will not be displayed

## Search Page

Finally, view the search page created



#### What is Elasticsearch?

- Also capable of providing advanced full-text search
- Easier to install
- REST based APIs, a simple HTTP interface, and uses schema-free JSON
- Distributed Document Store easy to use JSON document-oriented storage platform
- Logging data and analysis
- Visualization and real-time data monitoring when couple of Kibana

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#### Elasticsearch Configuration

- Install module
- Create an index on Elasticsearch engine
- Create a view
- Attach facet filters

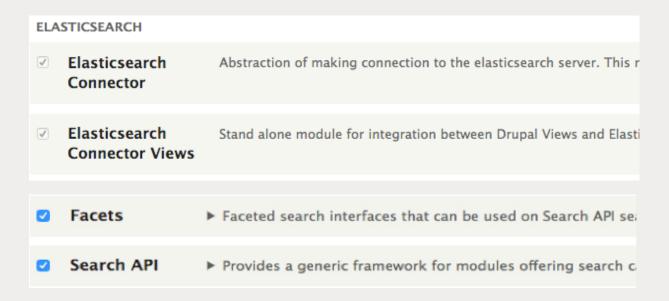


#### Install the Drupal modules

The Search API module needs Elasticsearch PHP library which provides the abstract layer of Elasticsearch Connector module in Drupal. This can be installed through composer.

\$ composer require nodespark/des-connector:5.x-dev

\$ composer update

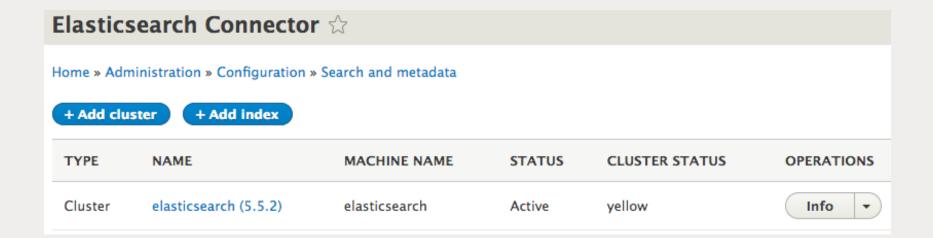


NOTE: Elasticsearch doesn't have Solr Search Defaults-like module. Setting up and creating a view page has to be done manually.

#### Add Elasticsearch

Go to Configuration > Search and metadata > **Elasticsearch Connector**.

Click "Add Cluster" and configure the Server.

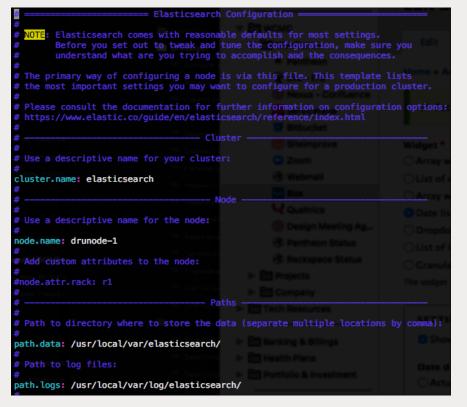


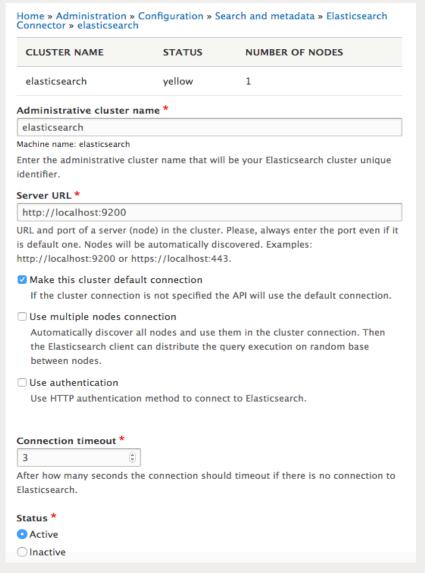
20

## Add Elasticsearch (continue)

Go to Configuration > Search and metadata > **Elasticsearch Connector**. Click "Add Cluster" and configure the server.

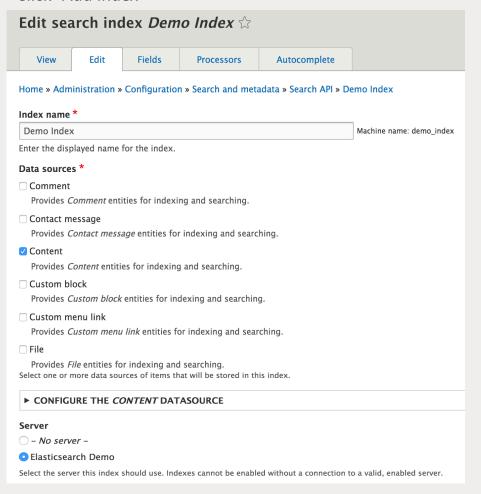
As default, it is "elasticsearch." If you want to edit the cluster/node information, edit elasticsearch.yml file.





## Add search index (same as Solr)

Go to Configuration > Search and metadata > Search API. Click "Add Index"

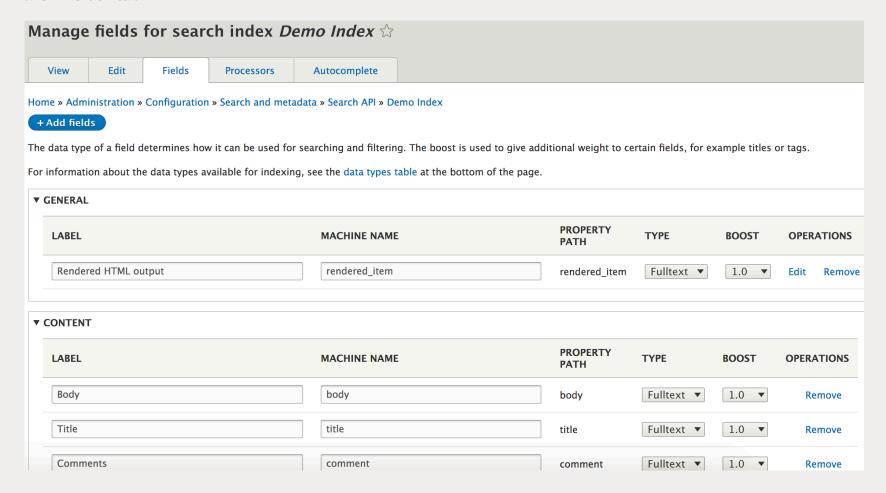


Selecting the "Content" data source, options are presented to select which bundles are to be indexed

| BUNDLES                                       |  |
|---|--|
| Which bu                                      | ndles should be indexed?                   |
| <ul> <li>All except those selected</li> </ul> |  |
| None e  | xcept those selected                       |
| Bundles                                       |  |
| Article                                       |  |
| Basic pa                                      | age  |
| LANGUAC                                       | GES  |
|   | guages should be indexed?                  |
| Which lan                                     |  |
|   | ept those selected                         |
| O All exce                                    | ept those selected<br>xcept those selected |
| All exce                                      | xcept those selected                       |

## Add fields to index (same as Solr)

Before search can be performed, select all the fields that should be available to search. That is configured in the "Fields" tab.

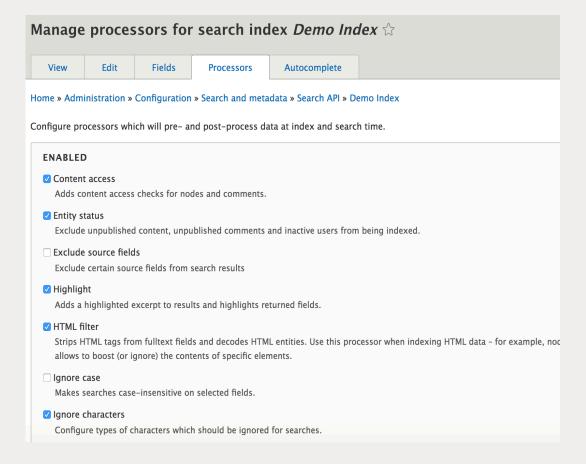


#### Add processors to the index (same as Solr)

Last step is to add additional 'processors'.

#### This includes items such as:

- Content access
- Ignore case (case-insensitive search)
- Tokenizer (split into individual words)

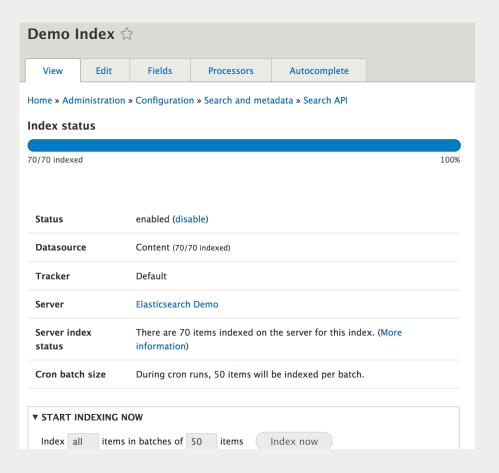


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#### Verify search index is working (same as Solr)

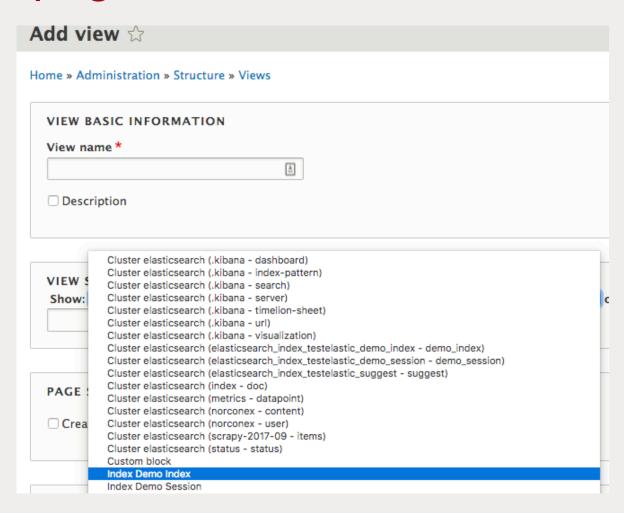
Once fields and processors are set up, go back to the "View" tab. It will show the status of the index, and at this point, the content is ready to be indexed if not already set to index immediately when the index is created.

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#### Create a view page

- 1. Go to Structure > Add view
- 2. Provide a view name and select your index name as the view source

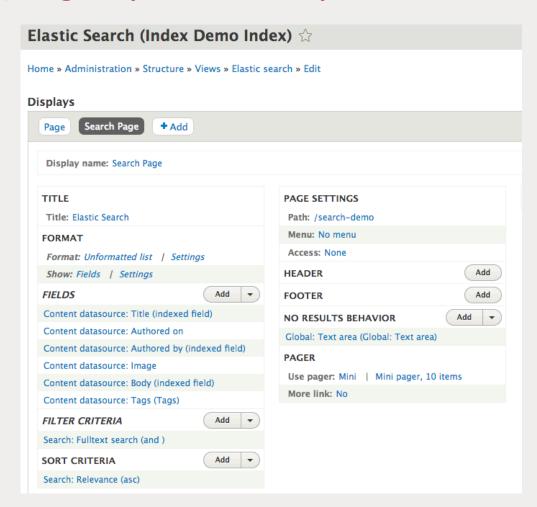


## Create a view page (continue)

3. Under Format > Show, select Rendered Entity

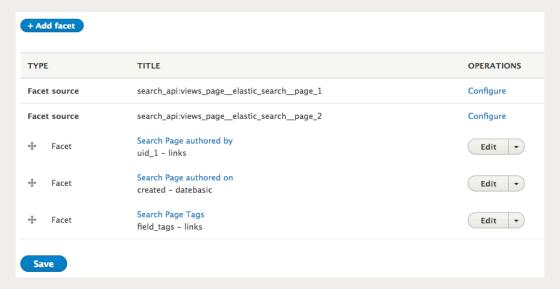
Or, you can select "Fields" and add each field you would like to display in the Fields section.

- 4. Under Filter Criteria, add "Fulltext search" field and expose the field for filtering
- 5. Add Sort Criteria: The best one to use is "Relevance (desc)"



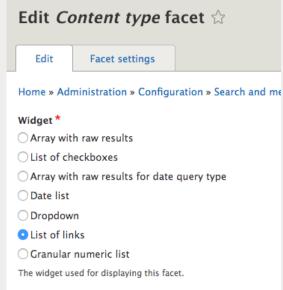
### Add search facets (same as Solr)

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Facets have a number of settings to configure:

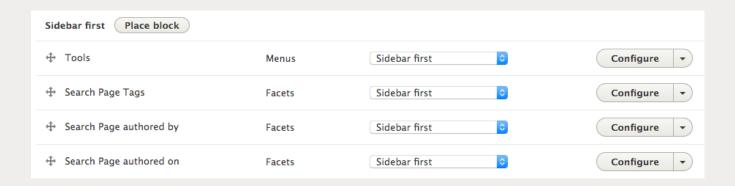
- Widget
- Show the amount of results
- Sorting (by count, display value...)
- Operator (OR and AND AND filters are exclusive and narrow the result set. OR filters are inclusive and widen the result set.)





## Place facet blocks (same as Solr)

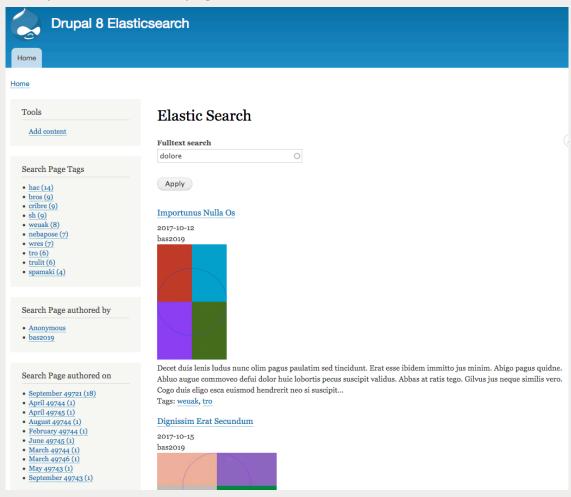
Last step, place the newly created Facet blocks on the Block Layout page



Note: Facet blocks don't need to have the page visibility set, it will automatically detect Each of the page a search page, otherwise, they will not be displayed.

### Search Page

Finally, view the search page created.



## Apache Solr or Elasticsearch?



Source: A scene from Annie Get Your Gun (1950)



#### When to use Apache Solr

- If there are few thousand nodes of content (or more, depending on server performance and whether hosted locally or externally)
- You do not want to put stress on the database
- If searching is a major feature of the site
- If you need to search multiple fields



#### When to use Elasticsearch

- The Elastic Stack (Elasticsearch, Logstash, and Kibana) can interactively search, discover, and analyze to gain insights that improve the analysis of time-series data.
- No need for upfront schema definition. Schema can be defined per type for customization of indexing process.
- Has an edge in the cloud environment this is depend upon SolrCloud advancement.
- Has advantages of search for enterprise or higher-ed level where analytics plays a bigger role.

#### Additional resources

#### Solr:

Configuring the Search API server (D8) https://www.drupal.org/node/2763137

Drupal 8 and Solr: Google-fast search on your own website | Why and how <a href="https://blog.openlucius.com/en/blog/drupal-8-and-solr-google-fast-search-your-own-website-why-and-how">https://blog.openlucius.com/en/blog/drupal-8-and-solr-google-fast-search-your-own-website-why-and-how</a>

Set up faceted Apache Solr search on Drupal 8 <a href="https://www.jeffgeerling.com/blog/2016/set-faceted-apache-solr-search-on-drupal-8-2016-deprecated-apache-search-on-drupal-8-2016-deprecated-apache-search-on-d

When to consider Apache Solr https://lastcallmedia.com/blog/when-consider-apache-solr

#### **Elasticsearch:**

Indexing content from Drupal 8 using Elasticsearch <a href="https://www.lullabot.com/articles/indexing-content-from-drupal-8-to-elasticsearch">https://www.lullabot.com/articles/indexing-content-from-drupal-8-to-elasticsearch</a>

How to index Attachments and Files to Elasticsearch <a href="https://qbox.io/blog/index-attachments-files-elasticsearch-mapper">https://qbox.io/blog/index-attachments-files-elasticsearch-mapper</a>

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Solr vs. Elasticsearch: 5 Factors to Consider https://www.cmswire.com/information-management/solr-vs-elasticsearch-5-factors-to-consider/

# Questions?

