



365 Indexer 1.0

User Guide

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Installation

365 Indexer is an add-on product for use with dtSearch Desktop or dtSearch Network or later.

Before installing 365 Indexer you must install a copy of dtSearch Desktop or dtSearch Network* on the machine where you will create and maintain the indexes.

dtSearch Network licenses include use of an extra copy on a single additional machine for indexing and/or for shared network index access.

Install 365 Indexer on the same machine where your copy of dtSearch Network is installed, it will automatically detect where dtSearch Network is installed and will warn if a copy cannot be found.

The default install folder is ...**Program Files (x86)\DTSUK\365 Indexer**

IMPORTANT: Before installing any **beta** build, from Windows Control Panel, uninstall previous versions from the machine. Ensure that the install folder is completely empty before installing the beta version.

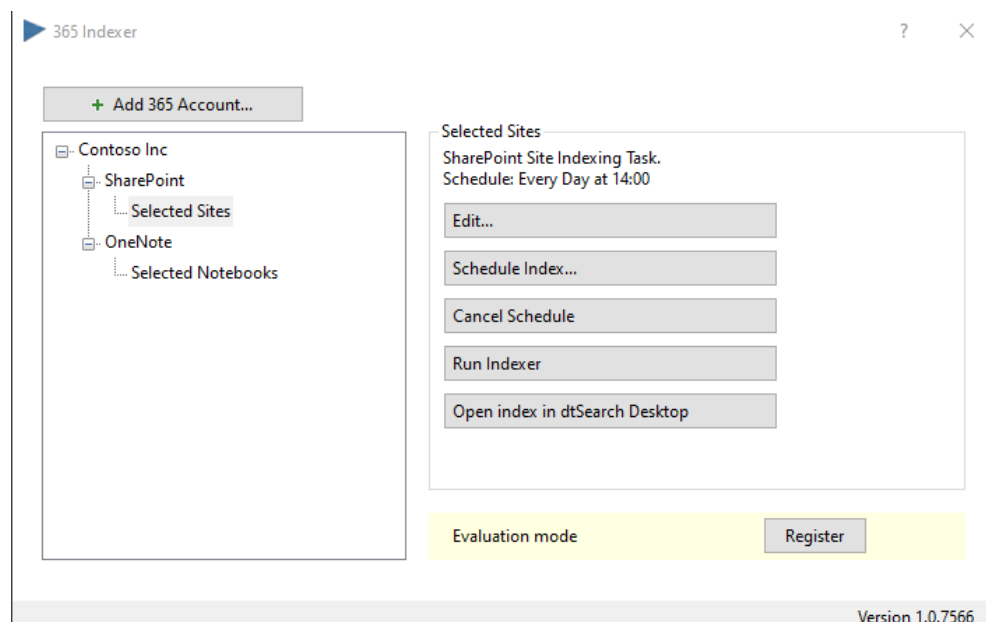
*Needs dtSearch version 7.96 or later

Evaluation mode

Limits:

- Scheduled indexing is not functional.
- SharePoint only 6 items per list are indexed
- OneNote a maximum of 3 pages per notebook section are indexed

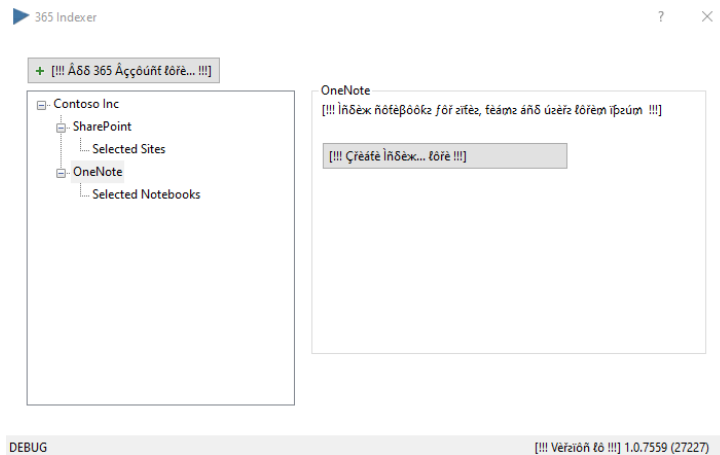
To remove the limits, click **Register** and enter your serial number; you can find your serial number later by clicking on the help (?) icon in the title bar.



Translation

The default language of the user interface is English. To translate the user interface, make a copy of the **365 Indexer - template.lang** file which is in the `\I18N` subfolder.

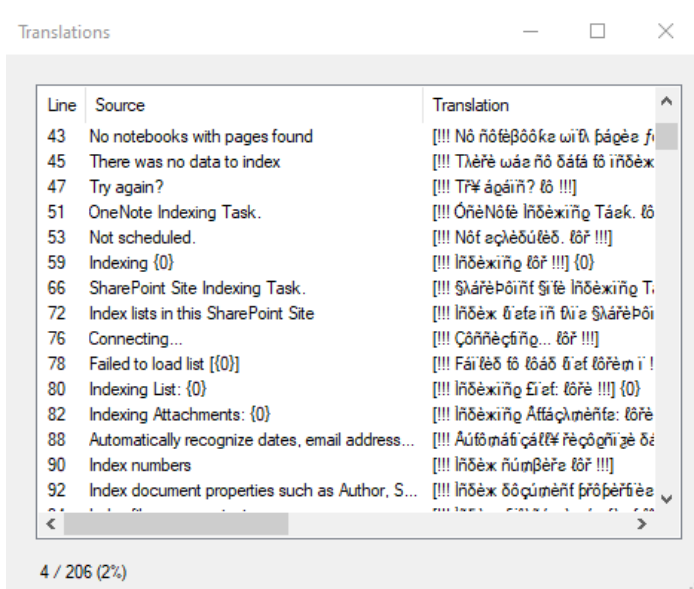
Place the untranslated copy of the template file in the same folder as the **365 Indexer.exe** file and run 365 Indexer, you will see all the English text is replaced by pseudo-language with a width 30% wider than English to take into account the typical expansion that occurs in translating from English to many other languages. Text Labels in Database Indexer will automatically expand to accommodate the length of the text.



Translate the appropriate text using a text editor (e.g. Notepad), save it in utf-8 format (we suggest you rename it using IETF language tags (e.g. **fr-CA.lang** for Canadian French) and place the file in the same folder as 365 Indexer.exe.

If a file with filename extension **.lang** is found when 365 Indexer is run, it will read the file to translate the user interface.

To assist translators, 365 Indexer can be run with a command line **-t**. This will display the list of phrases to translate, as each line is translated and the surrounding `[[]]` are removed, it will indicate what number and percentage of lines are translated.



If you experience any issues translating the user interface please contact support@dtsearch.co.uk for assistance.

Getting Started

The steps to create an index are

- [Add a New Account](#)
- [Create a SharePoint Index](#) or [Create a OneNote Index](#)
- [Run indexer](#)
- [Set a schedule](#) for index updating if needed.

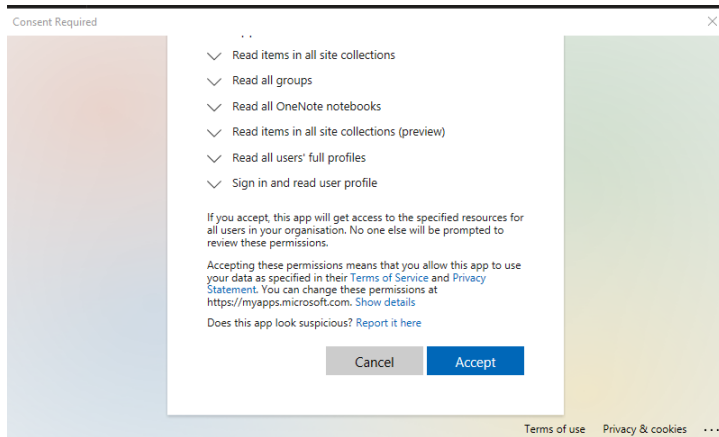
Click the **Edit...** button to change any of the settings later.

Add a 365 account

Open 365 Indexer and click the **Add 365 Account** button

Follow the prompts to log in with your Microsoft account. You may be prompted more than once to choose the desired Microsoft account.

When prompted for consent, click **Accept** to grant permission to 365 Indexer to read the necessary data. 365 Indexer requires read-only access to your Office 365 account.

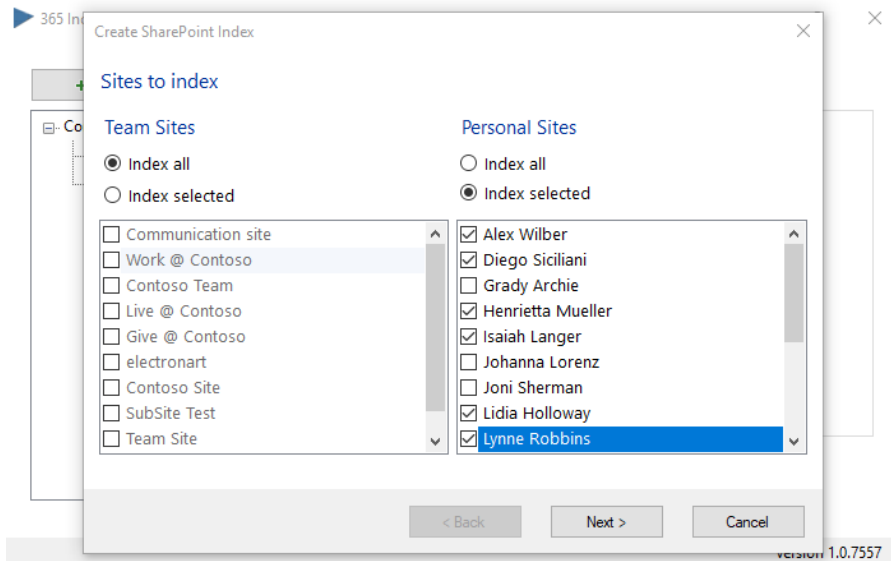


Although 365 Indexer requires permission to read all the items listed, it provides granular control over what SharePoint or OneNote files to index.

Create a SharePoint index

After you add a new Microsoft 365 account, select it from the list and press the **Create Index** button.

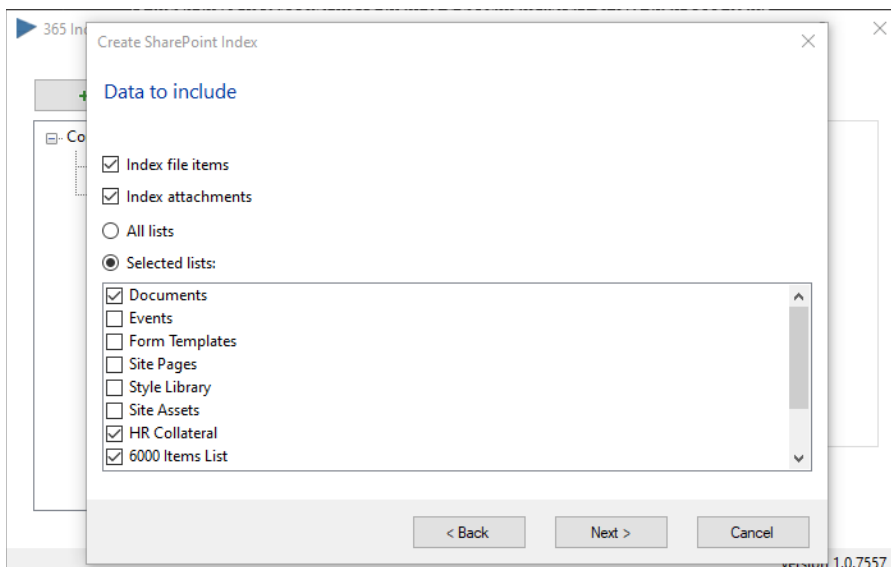
365 Indexer will read in the lists of sites from the account and display the Team and Personal Sites it found on the account. This may take a minute or so for large sites.



Choose **Index all** or **Index selected** team and personal sites as needed.

If you choose **Index Selected** sites, check each site needed (or none if you do not want to index personal sites for example).

Press the **Next >** button.



Select **Index File Items** to index files in lists of files in the SharePoint Site.

Select **Index Attachments** to index files that are attached to list items.

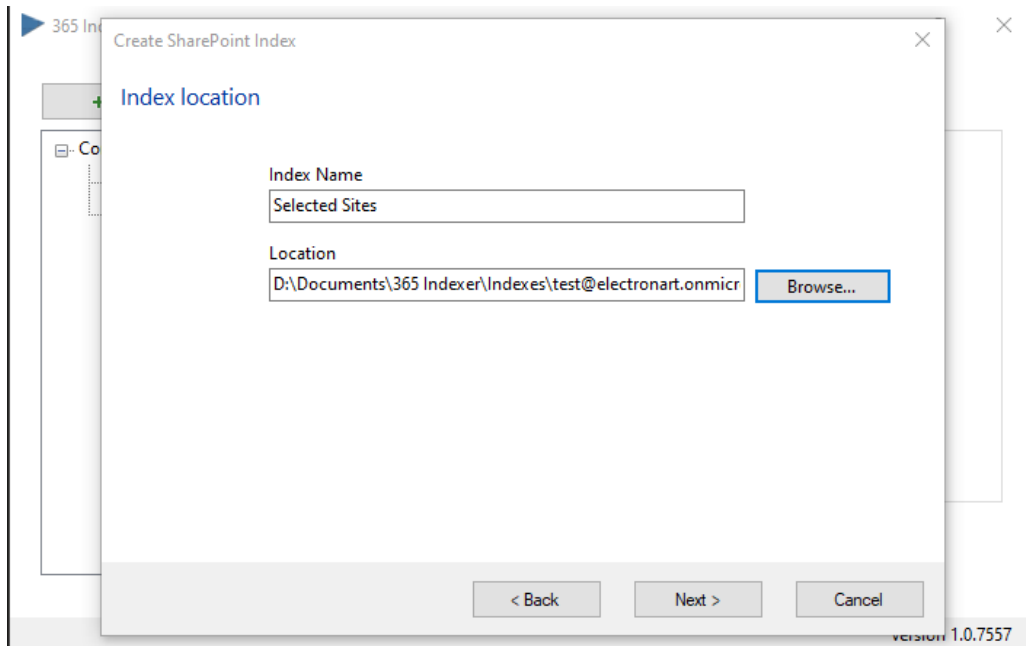
Choose **All Lists** or **Selected lists** and check the lists as needed.

Click the **Next >** button.

Set Index Name & Location

Choose an index **Location** on the same machine where you have read/write permissions.

Edit the **Index Name** as needed (the default name is Selected Sites or All Sites)

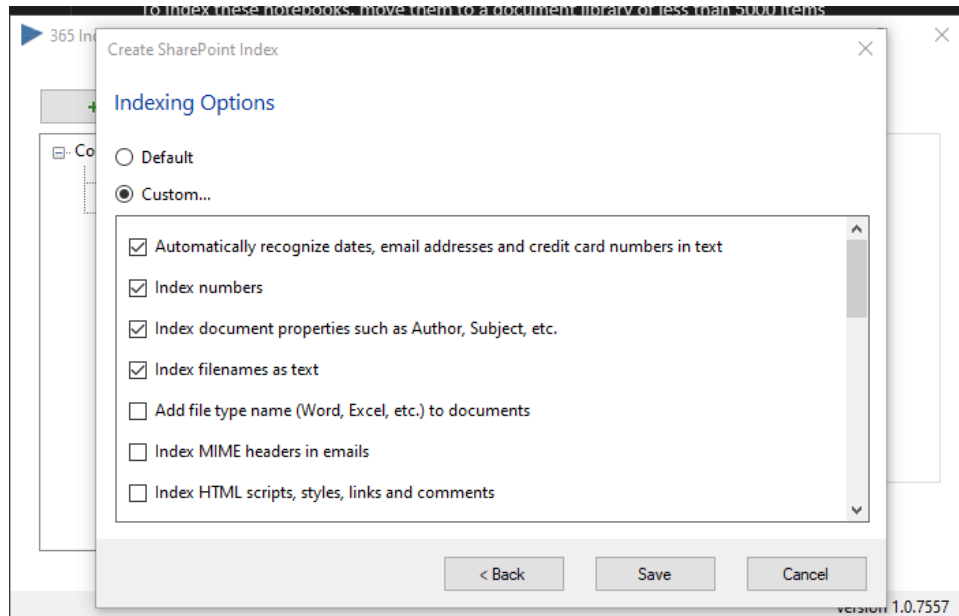


Finally press the **Next >** button and choose [Default](#) or [Custom](#) indexing options

Custom Indexing Options

Select Default or Custom indexing options.

If you want most of your indexes to have the same settings, select **Default** and edit the [Default Indexing Options](#) from the Help (?) dialog later, otherwise select **Custom** then check the options you need and **Save** your settings.



Generally the more indexing options that are selected the larger the index size will be.

If the documents being indexed contain many numbers, and if these numbers do not have to be searchable, this setting can reduce index size considerably. Note: 'numbers' are defined as a word starting with a digit, a word such as PO325379 is NOT considered a number.

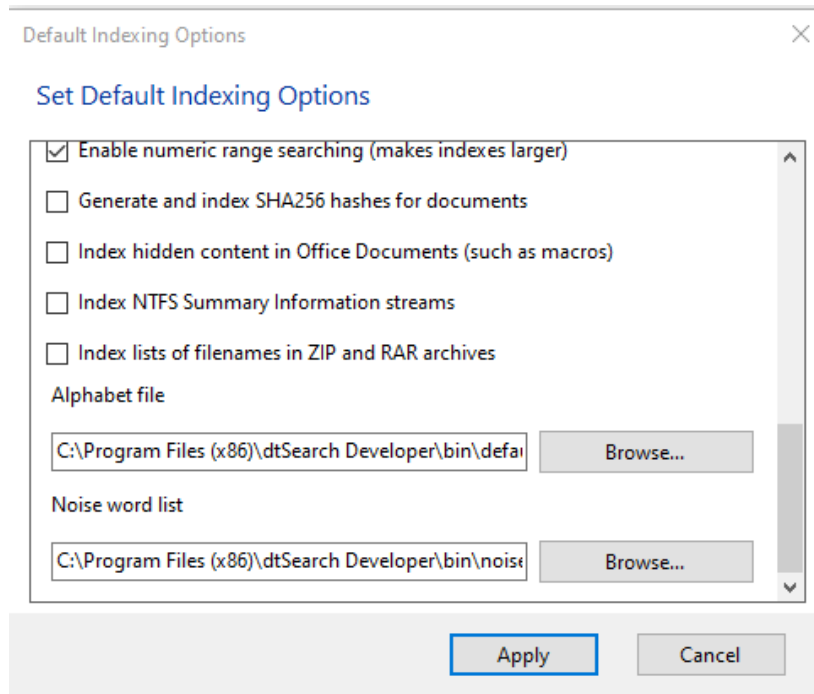
See Index Size & performance: <https://support.dtsearch.com/dts0142.htm>

Default Indexing Options

To change the default indexing options, click on the help (?) icon in the title bar and click on the **Default Indexing Options...** button.

The settings you choose will be applied to all index tasks that are set to use the default options.

From here you can also choose your Alphabet file and Noise word list from your installed copy of dtSearch Desktop\Network.



When finished click on **Apply** button

Note:

Noise word list. When you create an index, the index will store its own copy of the noise word list. Changes you make to the noise word list will be reflected in future indexes you create but will not affect existing indexes. If you make changes to the noise word file and want them applied to an existing index, you should rebuild the index.

The noise.dat file supplied with dtSearch contains English words. If you are searching non-English text, either edit the file to remove all the words and save it as none.dat or enter words appropriate to the language of the text you will be searching and save it with an appropriate name.

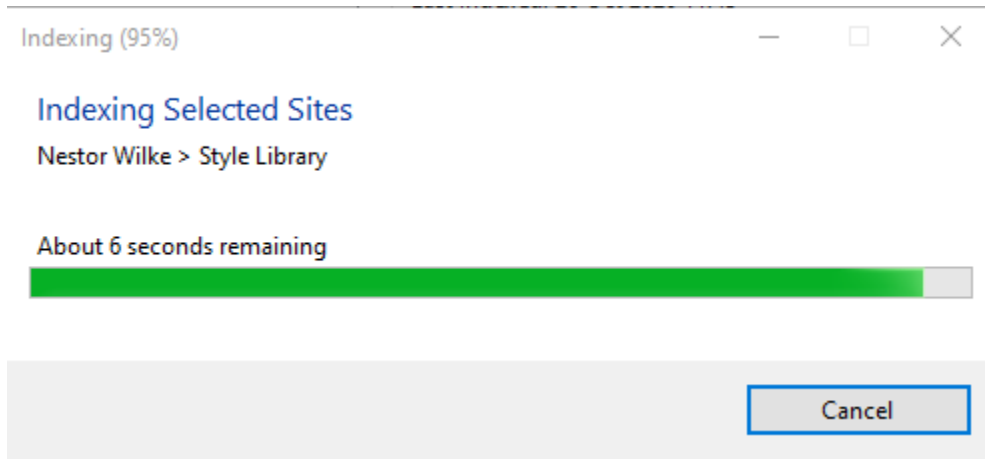
Alphabet file. The alphabet file determines how dtSearch interprets certain characters in your documents. If you modify the default.abc file, for example to make a character such as + searchable, we recommend using **Save as...** to save with a different filename. You will need to rebuild your index if you edit the alphabet file.

Run Indexer

After you create an index, we recommend you manually run the indexer before setting up a schedule. This is particularly important with very large document collections, to check that the indexing task can be completed within your intended schedule.

Select the index to run in the left-hand pane, then click the **Run indexer...** button.

It will display a progress dialog.



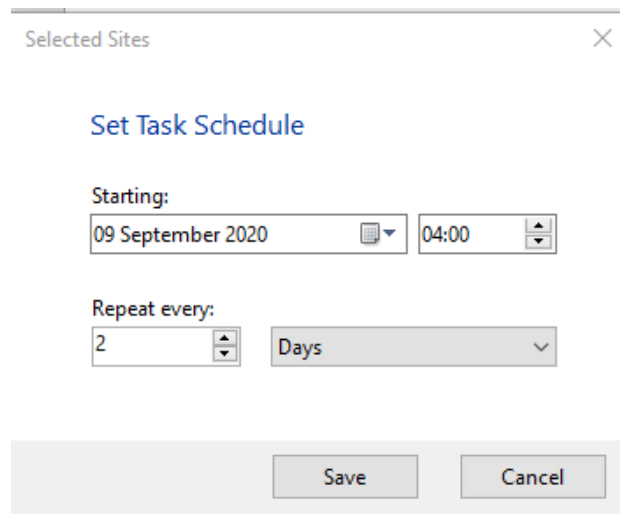
Note: In scheduled mode it will not display a progress dialog or error message boxes. All events and errors are logged in the Windows Event Viewer.

Schedule the Index updates

Before setting a schedule, we recommend that you use [Run Indexer](#) to check that indexing runs without errors and within your intended schedule.

Although the index can be updated manually by clicking the **Run Indexer** button, generally it is more convenient to run the indexer automatically on a regular schedule.

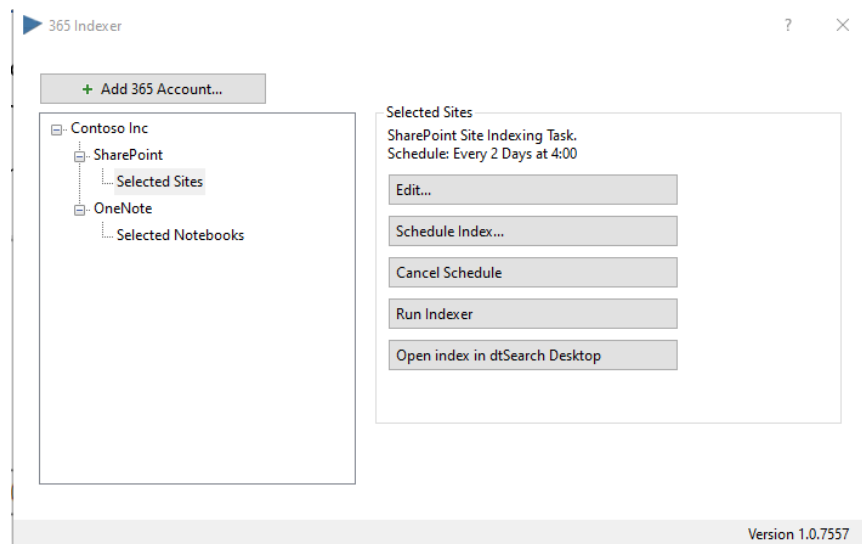
Select the index to schedule in the left-hand pane, then click the **Schedule index...** button



Set the **Starting** date and time, then set the repetition period in days or months.

It is usually preferable to set the schedule so that indexing is completed outside working hours.

Press **Save**.



The schedule details will appear on the main window along with a **Cancel Schedule** button.

To rebuild the index daily, ensure that it can be rebuilt within 24 hours; for very large sites rebuilding might not be possible, in which case you will need to create smaller indexes and schedule them separately.

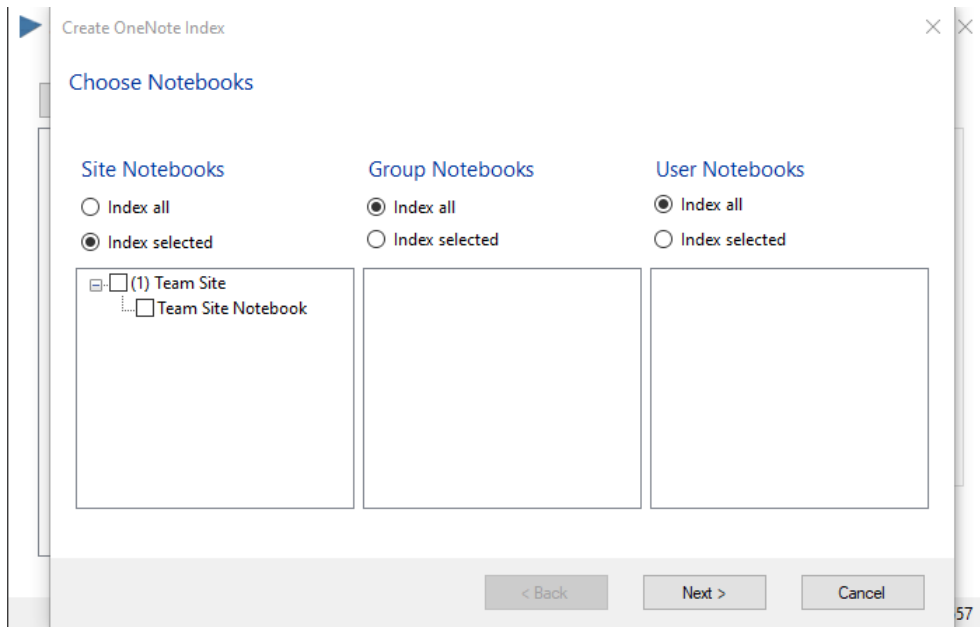
A useful technique is to try to keep documents which are updated frequently in separate indexes to documents that are seldom edited (e.g. Communication sites in SharePoint) so that appropriate schedules are set for each index.

Create a OneNote Index

Select a OneNote node from the left hand panel.

Click the **Create Index** button

365 Indexer will read in the lists of Notebooks from the account and then display the Site, Group and User Notebooks it found under the account. This may take a minute or so for large sites.



Choose **Index all** or **Index selected** Site, Group or User Notebooks as needed.

If you chose **Index All** it will index all existing Notebooks and automatically discover and index new Notebooks each time it is run.

If you choose **Index Selected**, expand the root node and select individual Notebooks (or none, if you do not want to index User Notebooks for example) to index only specific notebooks.

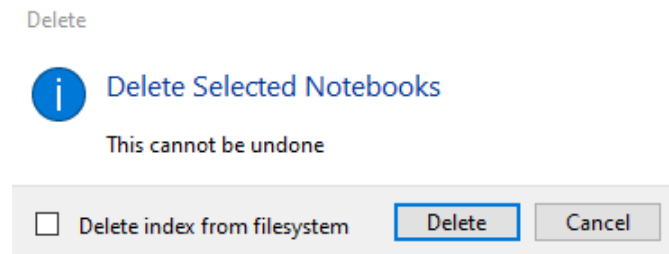
Ensure the Site/Group/User root node is unchecked to prevent new notebooks being discovered and indexed, or check it to index all notebooks belonging to the Site/Group/User, new notebooks will be automatically discovered and indexed when the task is run.

- Press the **Next >** button.
- Enter an Index Name and Location
- Press the **Next >** button.
- Choose Default or Custom indexing options as needed
- Press **Save**.

Remove an index

To remove an index, right-click on an item in the list and choose **Delete**.

From the dialog that appears, select the **Delete index from filesystem** checkbox and press the **Delete** button.



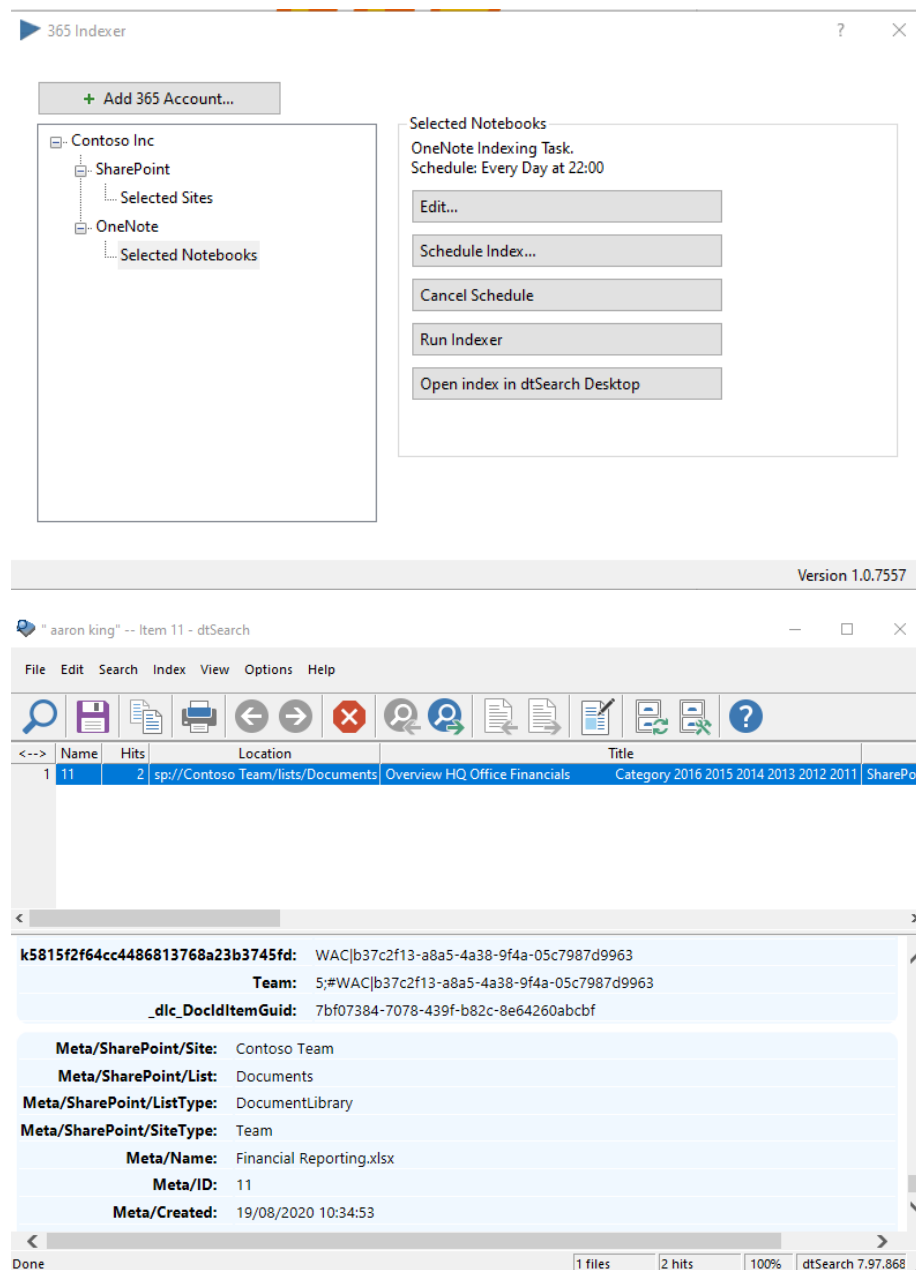
Remove data from Index

365 Indexer never alters or deletes any data in Microsoft 365 itself and only requires read permission.

If you delete a Notebook or document from Microsoft 365 it will not remove the data from the index. To clear data from the index if anything has been deleted requires the index to be rebuilt, either by clicking the **Run Indexer** button to do it immediately, or by clicking the **Schedule index...** button to rebuild the index later.

Open Index in dtSearch Desktop

If an Index has already been run at least once manually or on schedule, select it in the left-hand panel, then click **Open index in dtSearch Desktop**



dtSearch Desktop displays document meta data at the end of each document.

Choose **Boolean search**, click on the **fields...** button to see all the fields that are available to narrow down your search. For example you can narrow a search to Team or Personal Sites by choosing SiteType from the list of fields, this will automatically enter a search request of **(sitetype contains ())**, simply enter 'team' or 'personal' as needed, then click the **and** button and enter your other search terms for example: (Sitetype contains (team)) and Patti Fernandez

See [Enumerable Fields](#) for more information.

Stored Fields

Stored fields are stored in the index and will appear in the results columns in dtSearch Desktop.

In 365 Indexer 1.0 all fields are treated as stored fields in both SharePoint indexes and OneNote indexes.

The maximum size of a stored field is 128 characters. The total size of all stored fields associated with a single document, including field names, is limited to 27k.

These limits do not affect field searching. All fields in a document are searchable, regardless of how long they are or how many fields are in the document. For example, in a document with 100 fields each 64k in length, all of the data in all of the fields is searchable. The limits described above apply only to fields that are copied into the index and returned in search results.

Enumerable Fields

Enumerable Fields are fields whose values will be stored in the index in a way that permits fast enumeration. All Enumerable Fields are also Stored Fields.

Enumerable fields can be used for facet searching (supported in the Universal Search API and Universal Search Clients).

Both SharePoint Indexes and OneNote have enumerable fields, detailed below:

OneNote

Notebook	Name of the Notebook the page or attachment is found inside
Tags	Tags found inside the page (if it is a Page and has any tags)
Type	Either Page or Attachment

SharePoint

Site	Name of the SharePoint Site
SiteType	Either Team or Personal
List	The name of the list inside the Site
ListType	Template Type of the List. Can be any of the values listed on This Page

In dtSearch Desktop when using Boolean search, click on the **fields...** button to see a list of all the available fields.

Get Help

If you need assistance with evaluating or setting up 365 Indexer, please contact support@dtsearch.co.uk. Always quote your product version and serial number when contacting support.

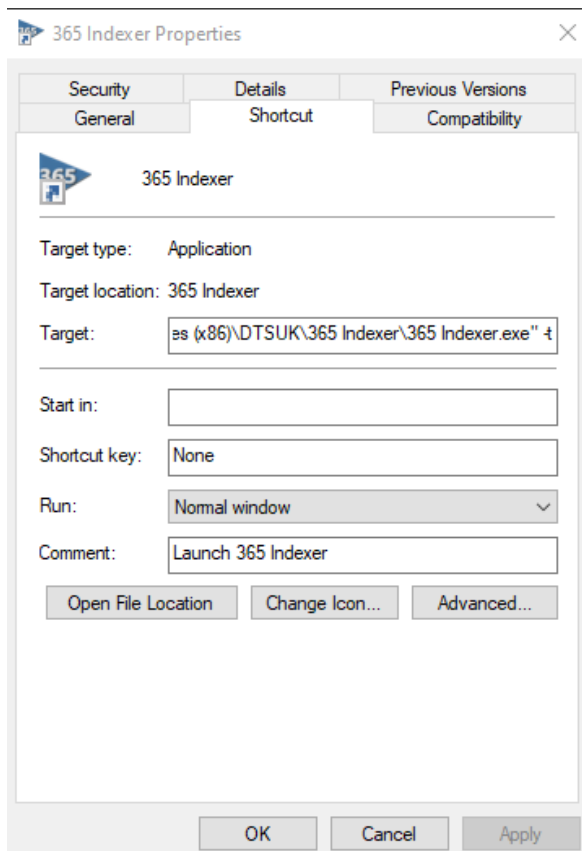
You will find free training articles on using dtSearch Desktop/Network and add-on products here: <https://www.dtsearch.co.uk/dtsupport/training.aspx>

Settings

The default indexing options can be changed by clicking the Help icon (?) in the title bar and clicking the **Default Indexing Options** button.

Command Line Options

To run 365Indexer.exe with command line options, create a short-cut on your desktop then right-click on it and choose **Properties**; enter the command line in the **Target** and click **Apply, OK**



Feedback

Please give us feedback on this user guide so that we can provide content that is useful and helpful. support@electronart.co.uk Thank you!

Appendix
