365 Indexer Enterprise 3.4

User Guide

For use with dtSearch Desktop or dtSearch Network 2024.01 or later

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Introduction

365 Indexer is an add-on product for use with dtSearch Desktop or dtSearch Network 2024.01 or later.

Who is 365 Indexer Enterprise 3.4 designed for?

365 Indexer Enterprise is designed for organizations that require restricted access, for example, limiting the app to specific SharePoint sites only, supporting deployment across many users without requiring administrator rights for each one, or meeting stricter enterprise or government security requirements.

If your organization normally allows or can grant Microsoft 365 administrator rights to the person setting up indexes, **365 Indexer 2.4** may be simpler to set up and may be suitable. See the 365 Indexer 2.4 User Guide for details:

www.dtsearch.co.uk or email support@dtsearch.co.uk.

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Installation

IMPORTANT

Before installing 365 Indexer Enterprise, confirm with your IT Administrator that:

- The app has been registered in your organisation's Azure portal
- Your SharePoint sites have been approved for indexing
- Your Azure AD group has been added to the Config Site list

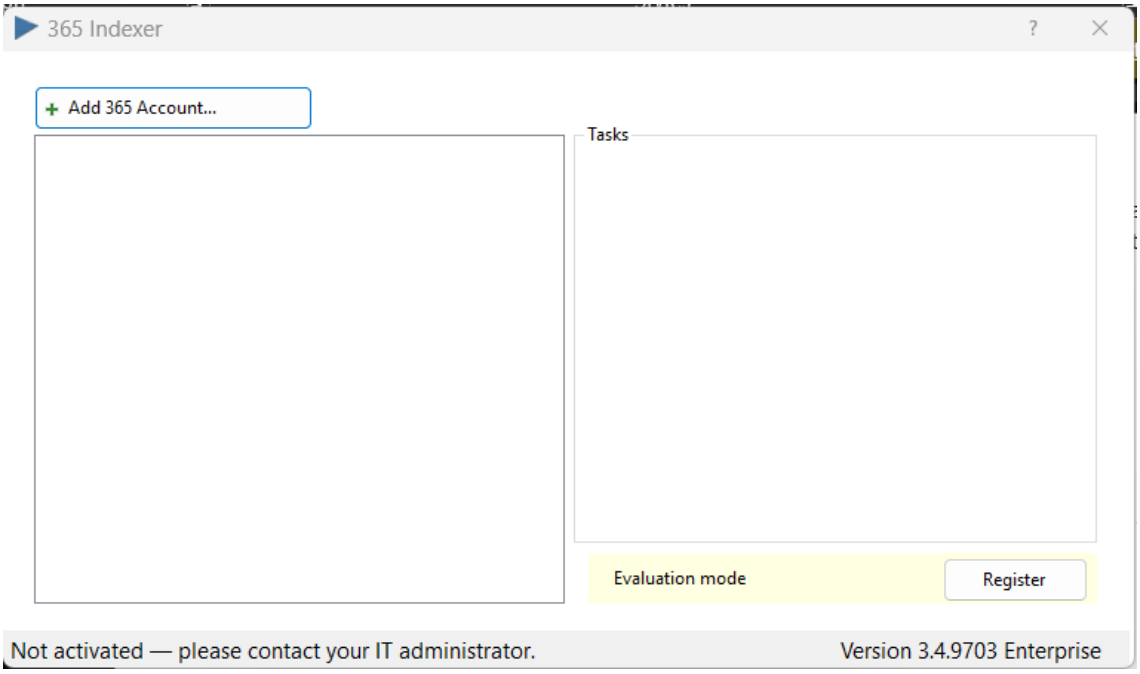
Before installing 365 Indexer you must install a copy of dtSearch Desktop or dtSearch Network on the machine where you will create and maintain the indexes.

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**

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.



After installing:

- Add your account and send the generated certificate file to your IT Administrator
- Wait for confirmation that the certificate has been registered before running the indexer

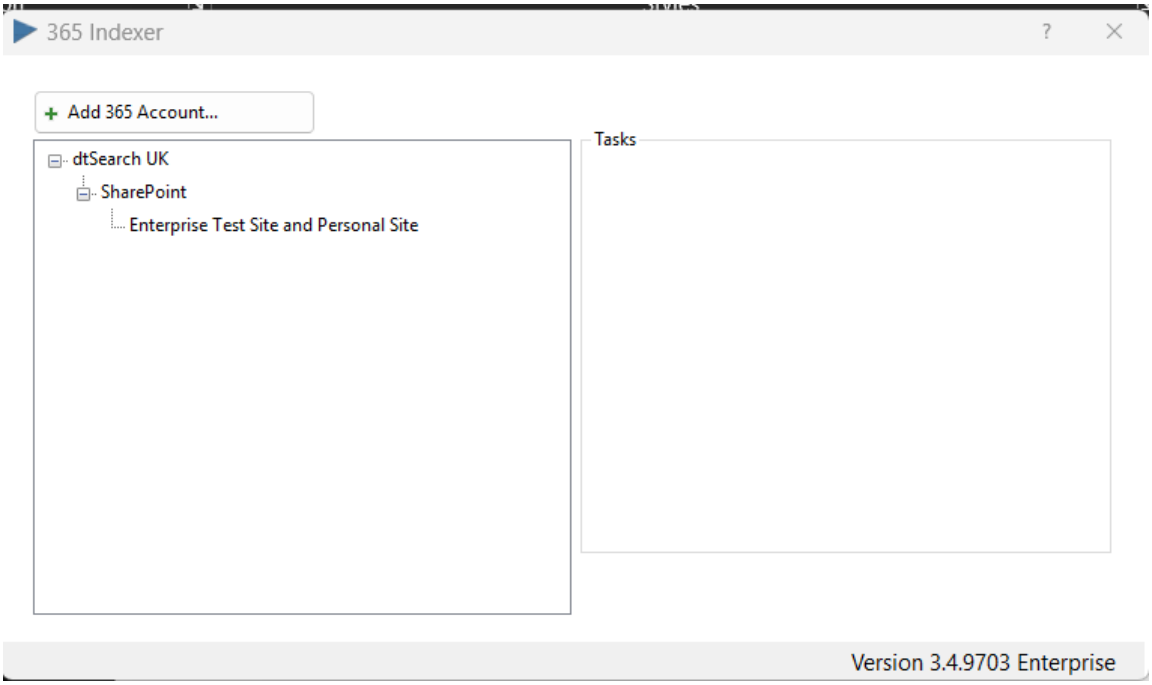
Evaluation mode limits:

- 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.

You can use your own serial number while evaluating or beta testing.

Your IT Administrator may also set up a site license serial number later; it will override your serial and display the date when it was issued in the About box.



What's New

Version 3.4 is the initial beta release, all feedback is welcome, contact:
support@dtsearch.co.uk

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.

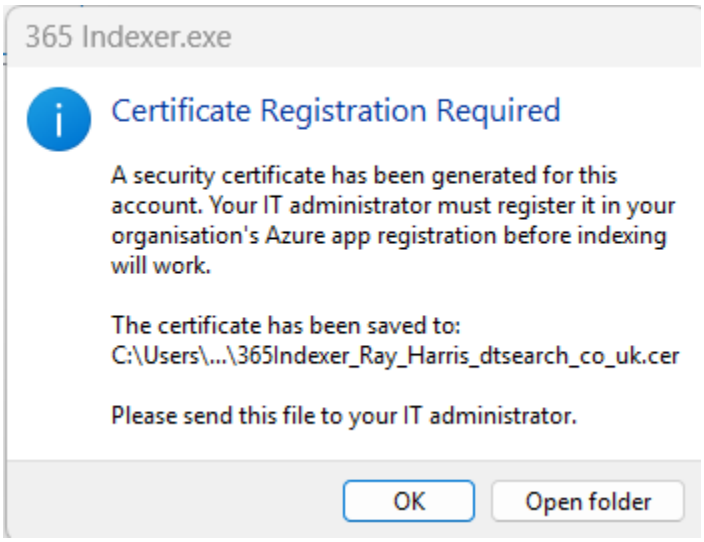
Add a Microsoft 365 account

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

Follow the prompts to log in with your normal corporate credentials - a Microsoft administrator account is not required to sign in (but see the note below about a one-time approval window).

The app will generate a unique certificate file for your installation.

A dialog will appear sharing the path to a .cer file, with an Open Folder button. The file is saved in your Windows temporary folder (%TEMP%) and is named after your sign-in, for example 365Indexer_jane_smith_example_org.cer.



Email* the .cer file to your IT Administrator. They will grant you access to appropriate SharePoint and OneNote sites and supply you with a serial number.

***Outlook will not send .cer files, they must be sent zipped**

Note – "Need admin approval" window: in the current release, after you sign in, 365 Indexer opens a window titled "Consent Required". If your account is not a Microsoft 365 administrator, this window shows "Need admin approval". Ask your IT Administrator to click **Have an admin account? Sign in with that account** in that same window and approve it; account setup then continues under your own account and the certificate dialog appears. This is needed each time a user adds an account, and will be removed in a future update. See "Need admin approval" when adding an account in the Troubleshooting section.

The account will immediately appear in the treeview.

You can proceed to **Create Index** to configure what you want to index, you can choose sites, but expanding a site to choose individual lists needs your certificate to be registered.

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Once you receive confirmation from your IT administrator, click **Run Indexer** to build your index. You do not need to sign in again or restart the application.

If you are upgrading from an earlier 3.4 beta, you will be asked to sign in once more the first time you use 365 Indexer.

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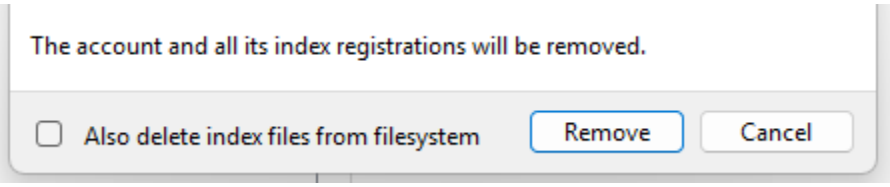
Remove an account

To remove an account, right-click the account name in the tree view and select Delete or click on the Remove account button.

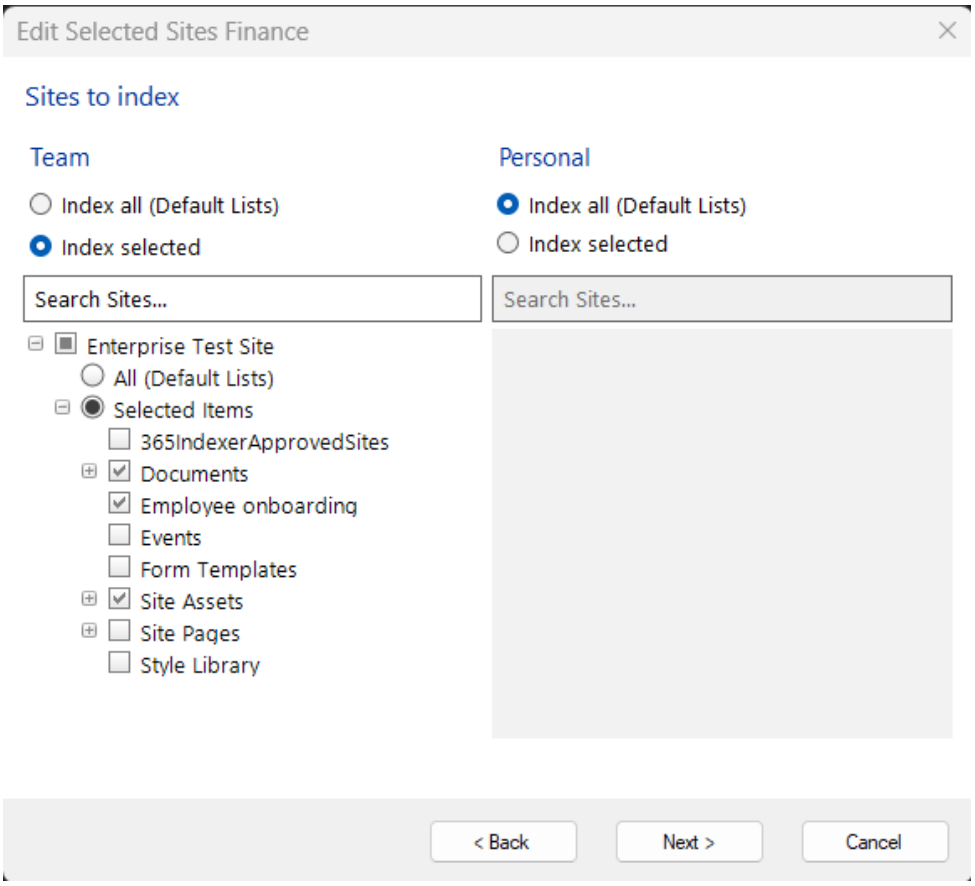


Before removing an account, note down the names and locations of any indexes associated with it, in case you need to recreate them. See How to reconnect an Index in the Troubleshooting section.

Create a SharePoint index

After adding your account and your IT Administrator has registered your certificate, select your account from the list and press the **Create Index** button, then select the **Create a new index** option.

365 Indexer will read in the list of sites that your IT Administrator has approved for you. This may take a minute or so for large sites.



Choose **Index all** or **Index selected** 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).

If you choose **Index All**, every site your IT administrator has approved for you is indexed, including sites they approve later. Only lists in the Default Lists are indexed. Press the **Next** button and choose the **Default Lists** and **Data to Include.**

Index all needs your Microsoft sign-in to be current. If a scheduled run reports it could not read the approved sites list, run the index once manually

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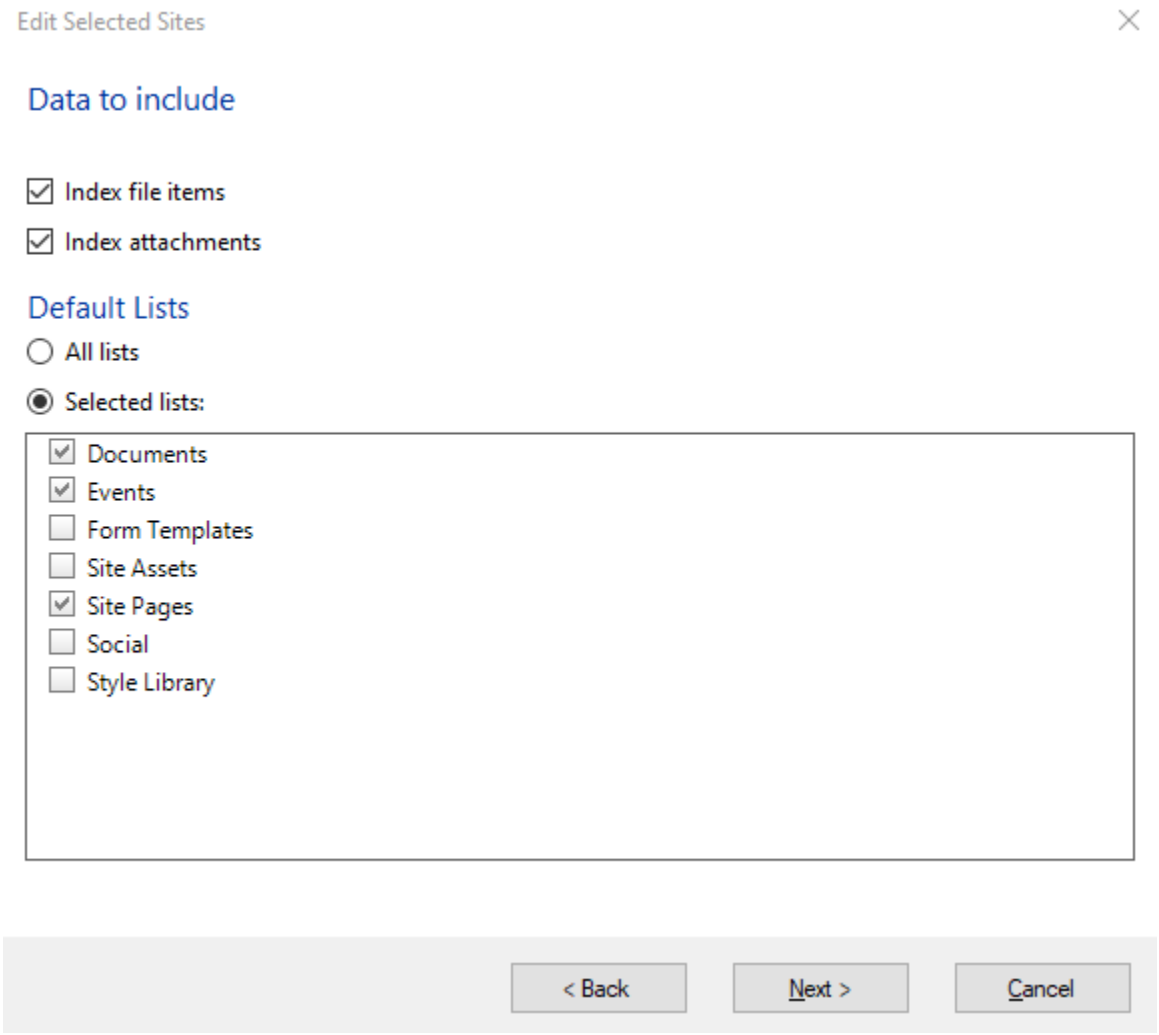
Set Data to Include & Default Lists



Data to Include

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.

Default Lists

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

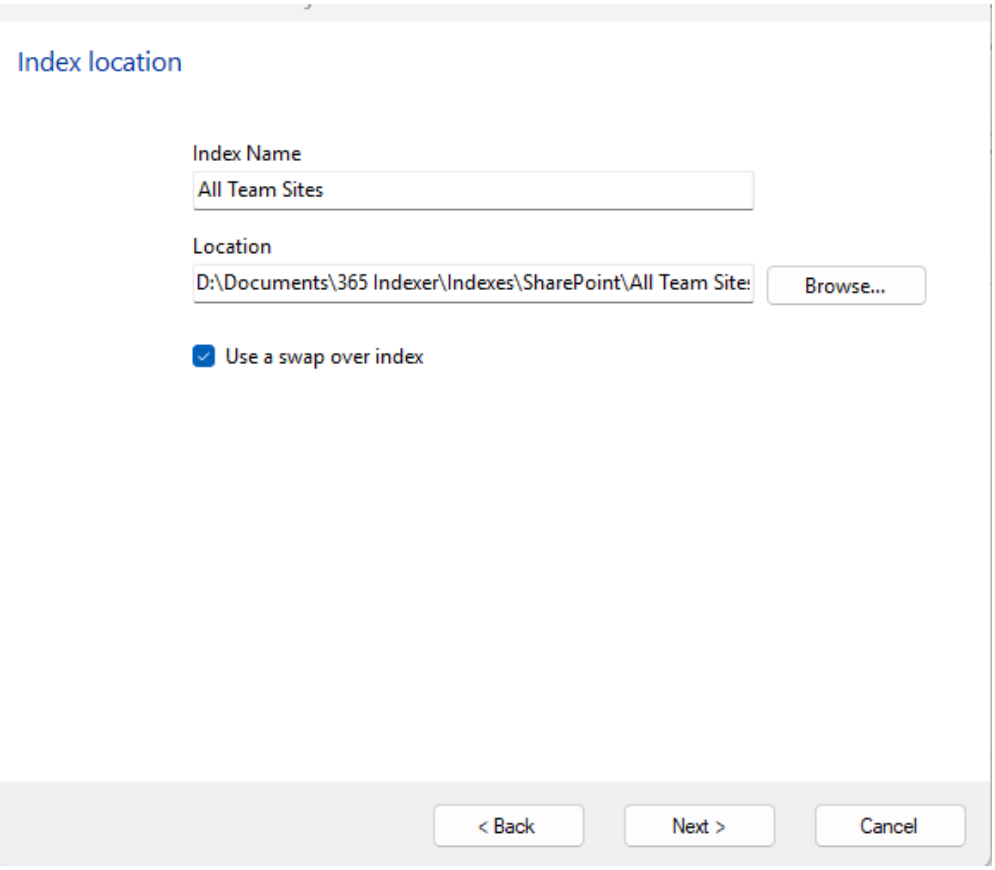
Click the **Next >** button.

Set Index Name & Location

The default index location is the users Documents\365 Indexer\Indexes folder; you can move that folder if necessary. Choose an index location on the same machine, on a drive where you have read/write permissions, Browse to the new location.

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

Unselect **Use a swap over index** if not required.



Finally press the **Next >** button and choose Default or Custom indexing options.

365Indexer automatically stores all the index locations in an Index Library file (at My Documents/365 Indexer) and dtSearch Desktop automatically lists the library file in its Index Manager.

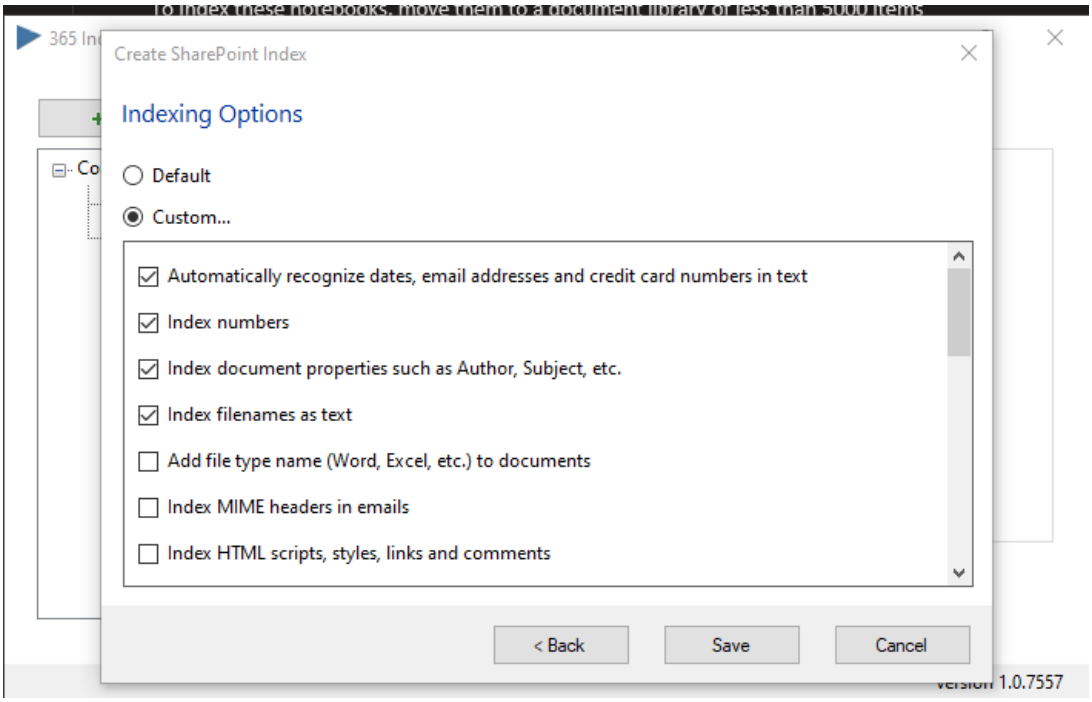
Change Index Name

Renaming the index is quickest by using the right-click context menu in the tree view, see Rename an index.

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.

Index numbers
If the documents being indexed contain many numbers, and if these numbers do not have to be searchable, unchecking 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

Index filenames as text
Index document properties such as Author, Subject, etc.
See: How to prevent filenames and document properties from appearing in documents
https://support.dtsearch.com/faq/dts0173.htm

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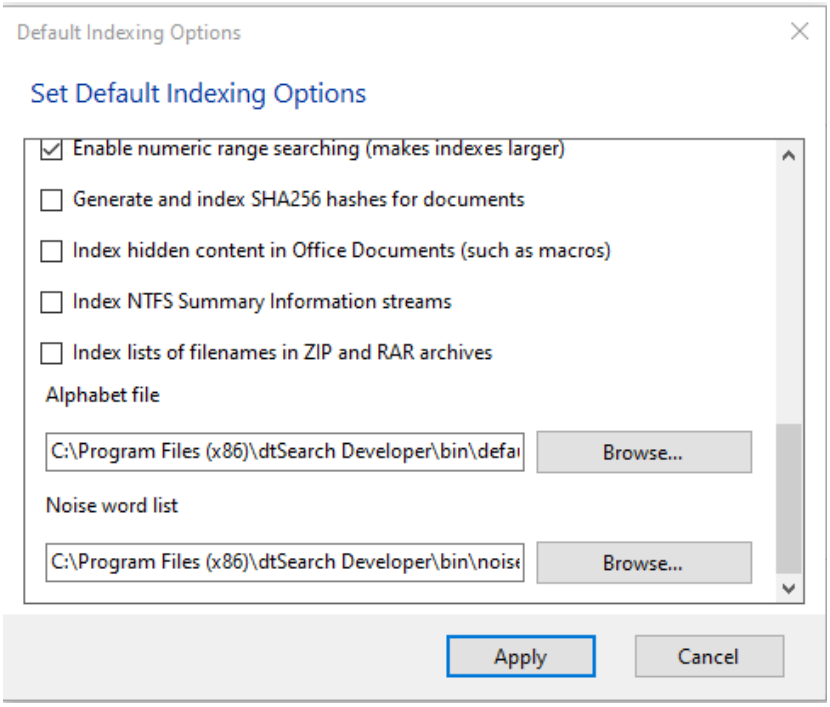
Default Indexing Options

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 for 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.

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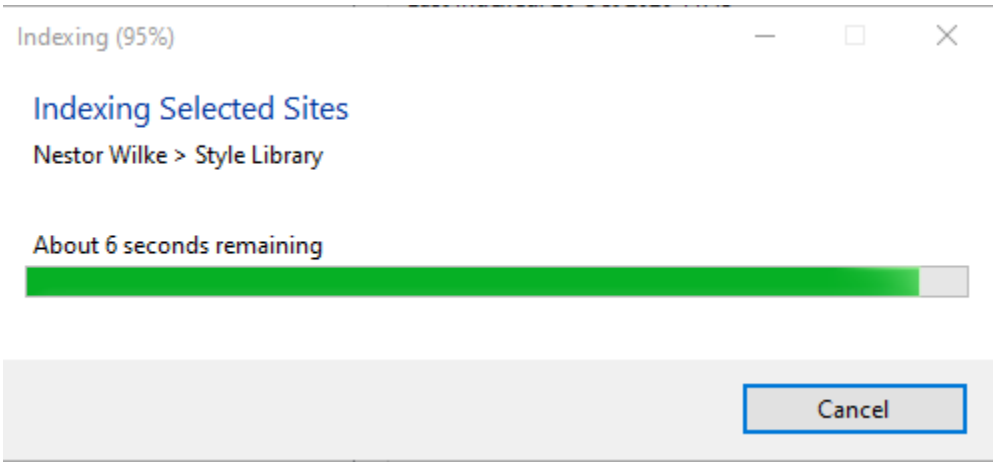
Run Indexer

After you create an index, we recommend you manually run the indexer before setting up a schedule for indexing to be carried out unattended. 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.
CAUTION: Run Indexer rebuilds the index. (See page Swap over index)

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**.

To export and send the logs for support purposes:
1. Open Event Viewer by pressing the Windows key + r. Enter **`eventvwr.msc`** in the dialog that appears and press OK.

2. In the left-hand panel select **Windows Logs > Application**
3. In the right-hand panel select **Filter Current Log**.
4. In Event Sources select **365 Indexer**, press OK.
5. In the right-hand panel select **Save All Events As...** and **Save as type:** CSV**,** click **Save.**

Small CSV or .evtx Event Log files can be emailed as attachments to support@dtsearch.co.uk

Note: When selecting **All Notebooks** or when your document library contains thousands of items you may get an error message showing that some Notebooks were skipped.
See Microsoft Graph API 5000 limit

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Swap Over Index

The **Use Swap Over Index** option is on the **Index Location** dialog. From the main window, with a site selected, press **Edit** then press **Next...** twice to navigate to the **Index Location** dialog.

Normally indexes are rebuilt outside working hours using the scheduler; searching of **all** data is only available once the initial index is built or until it is completely rebuilt on schedule. (Indexes are built in stages, **some** data will be searchable before indexing is complete).

For example, if an organization requires the index to be searchable during working hours of 9am to 5pm, the index could be rebuilt starting at say 5.30pm and must be completed by 9am the next day – a total of 15.5 hours.

If your indexing takes longer, try creating several smaller indexes that could be indexed simultaneously. Ensure you are only reindexing data that has likely been edited or added to; keep archived material, such as completed projects, closed cases or reference libraries in separate indexes.

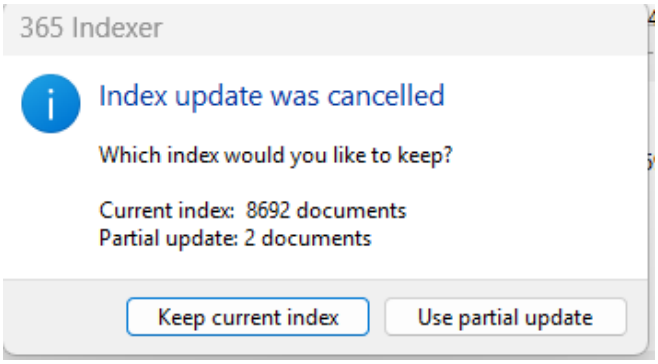
For organizations that require an index to be available for searching 24 hours, the **Use Swap Over Index** option should be used. During the initial index creation, it works the same as a standard index, however when it comes to update the index, instead of rebuilding the index, it creates a temporary 'swap' index in the same parent folder as the existing index; when the 'swap' index has completed indexing, it replaces the existing index; the 'swap' index is then deleted.

Use Swap Over Index is the default and recommended option setting. Advantages are that if an index update is cancelled there is an option to revert to the stored 'swap' index if one exists, as well as the index remaining available for searching while building a new index.

The disadvantage of using a swap over index is the disk usage of the 'swap' index.

Cancelling an Index Update Task

You can click on Cancel at any time during an index task, it will display **Please wait** for 1 – 2 minutes during that process. It will also display a warning that it will result in a partial update.



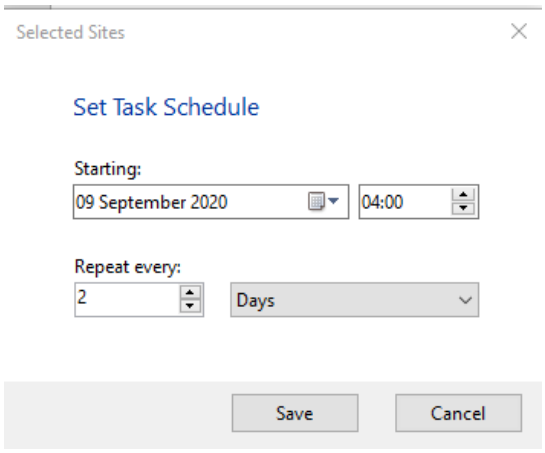
For large index tasks you will also have the option of keeping the current index or using the partial update.

Schedule the Index updates

Before setting a schedule, we recommend that you check that indexing runs without errors and within your intended schedule by manually building an index. CAUTION: Pressing Run Indexer will rebuild the index (See Swap over index).

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.

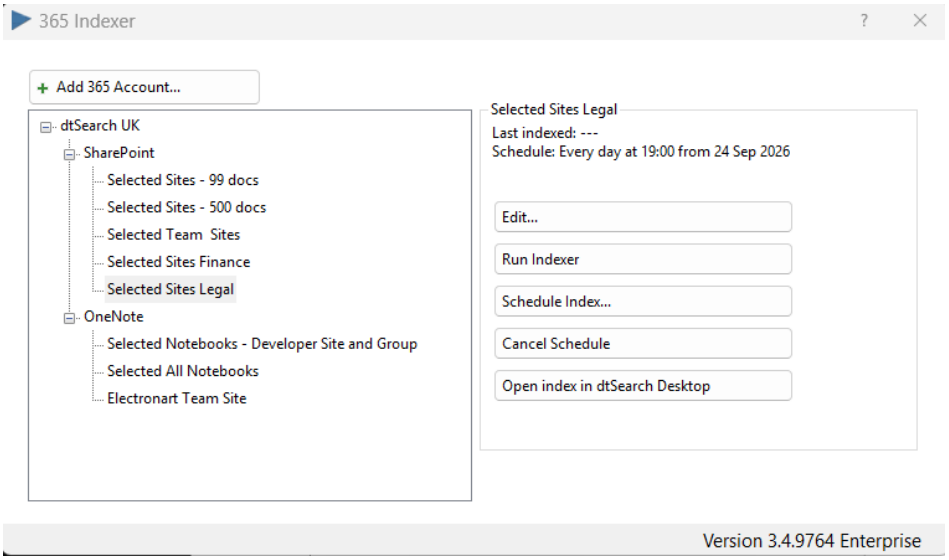
Select the index to schedule in the left-hand pane, then click the **Schedule Index…** button



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.

The schedule will appear in Windows **Task Scheduler**, from where you can **Run** the task at any time.

To rebuild the index daily, ensure that it can be rebuilt outside working hours; for very large sites this might not be possible, in which case you will need to create smaller indexes and schedule them separately. There is also a Monthly option for sites that don't need to be updated frequently. From version 2.3 there is also a **Swap Over Index** option, this ensures the index remains available for searching while building a new index.

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.

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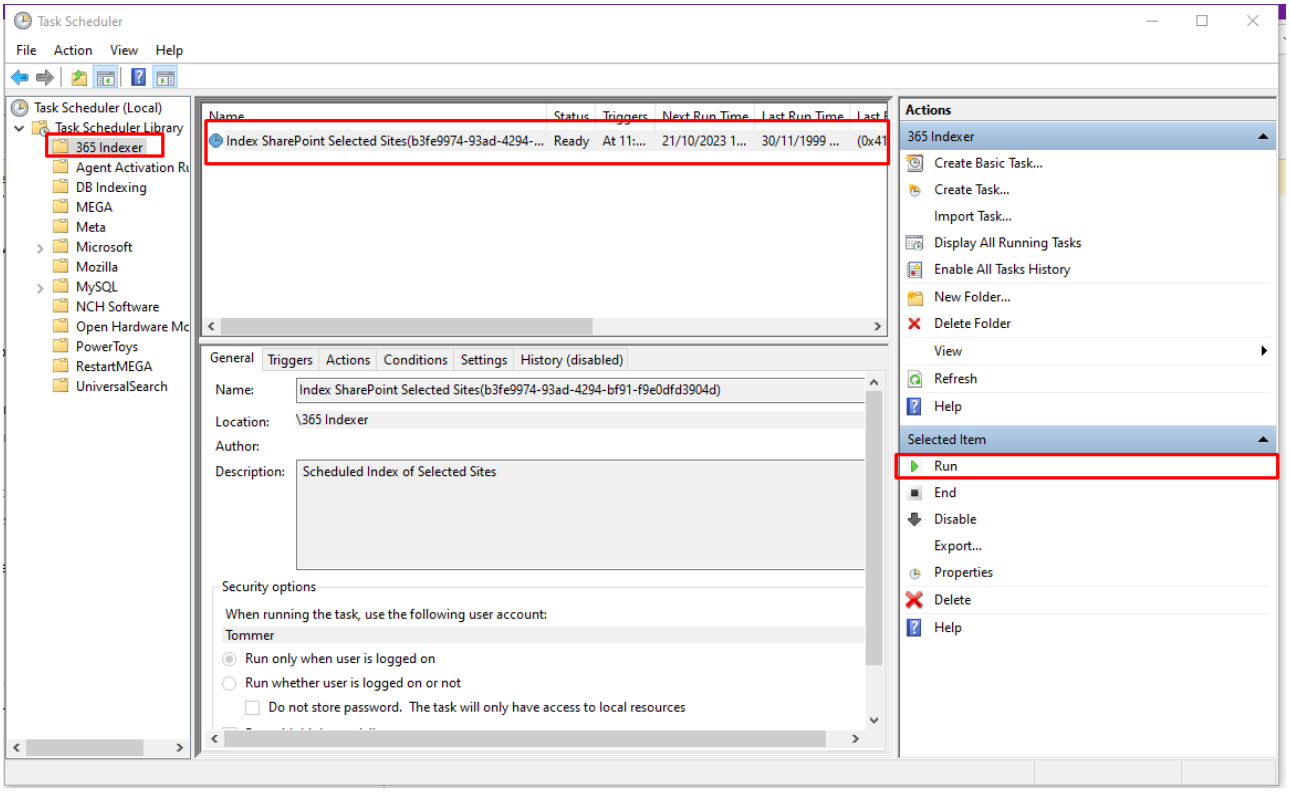
The schedule you set in 365 Indexer will appear in Windows **Task Scheduler**, from where you can **Run** the task at any time.

To launch Task Scheduler in Windows 10 or 11, press the Windows button or click inside the search box on the task bar, type in `Task Scheduler` in the search box and press enter.



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Create a OneNote Index

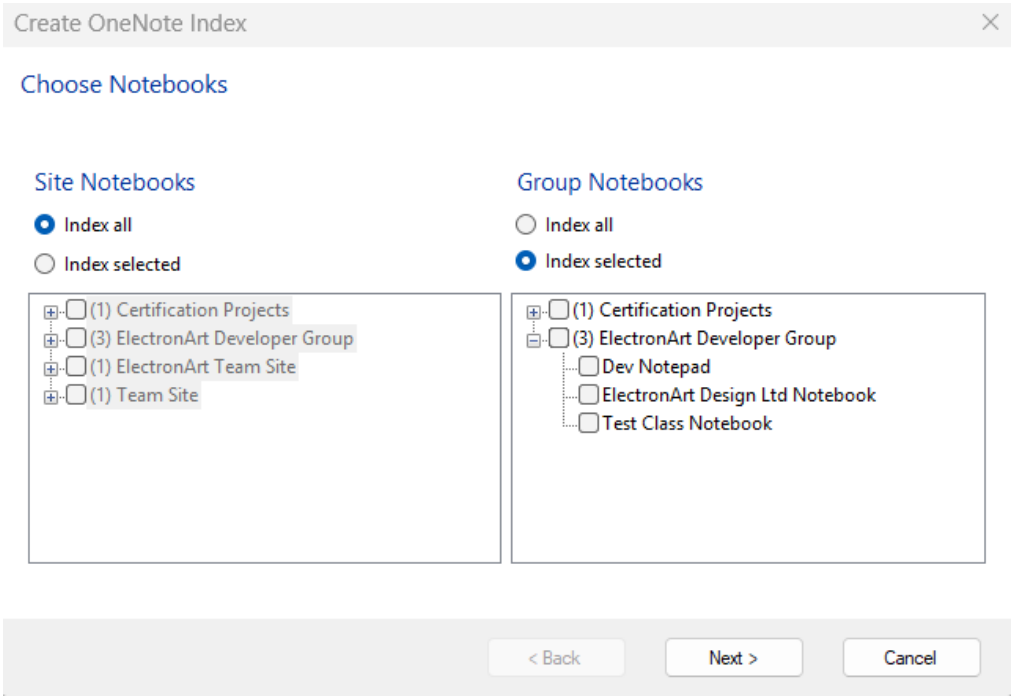
NOTE: This feature may not be enabled in your organization.

Select a OneNote node from the left hand panel.

Click the **Create Index** button, then select the **Create a new index** option.

The first time you try to Create a OneNote index a Microsoft account login dialog will appear (also if not used within 90 days).

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



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

If you choose **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 do not select any, if you do not want to index any User Notebooks for example.

Ensure the Site or Group root node is unchecked to prevent new notebooks being discovered and indexed, or check it to index all notebooks belonging to the Site or Group, 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.**

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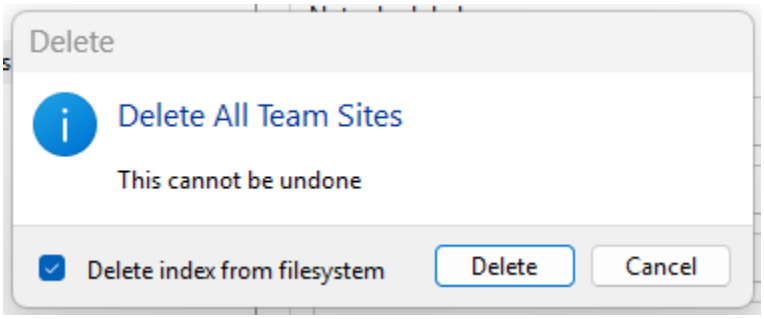
Remove an index

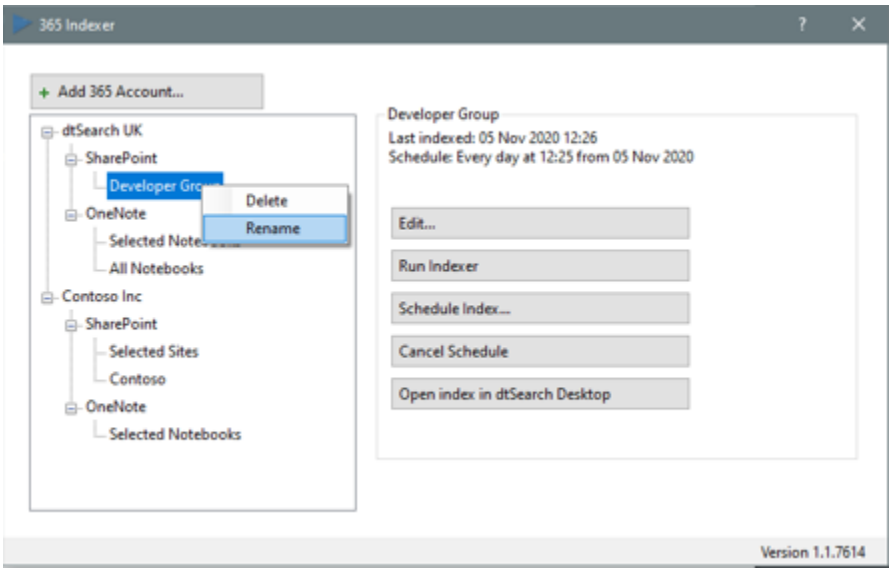
To remove an index, right-click on an item in the list and choose **Delete**.

Select the **Delete index from filesystem** checkbox and press the **Delete** button.



Rename an Index

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



In the dialog that appears edit the name and press **OK**.

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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, or by clicking the **Schedule Index…** button to rebuild the index in future.

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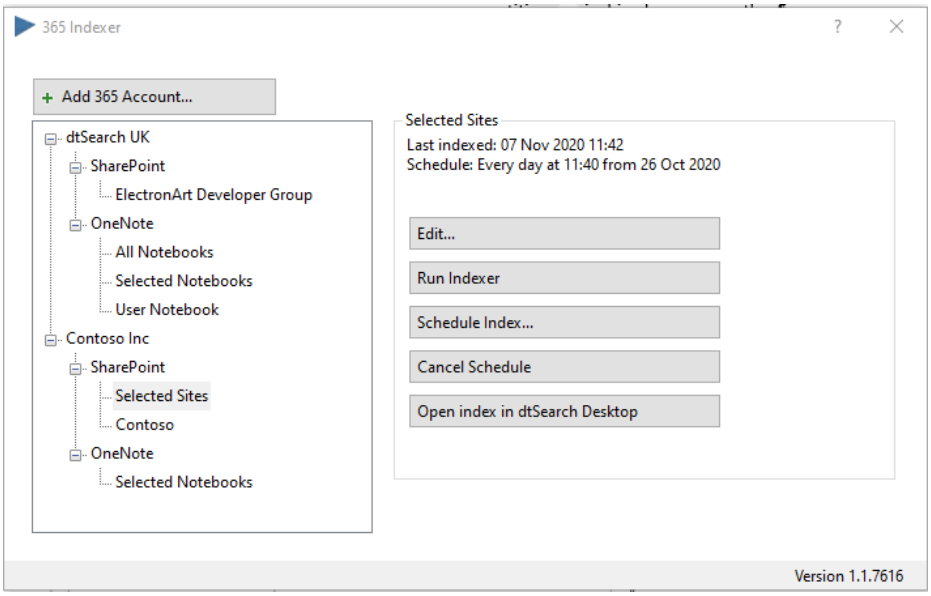
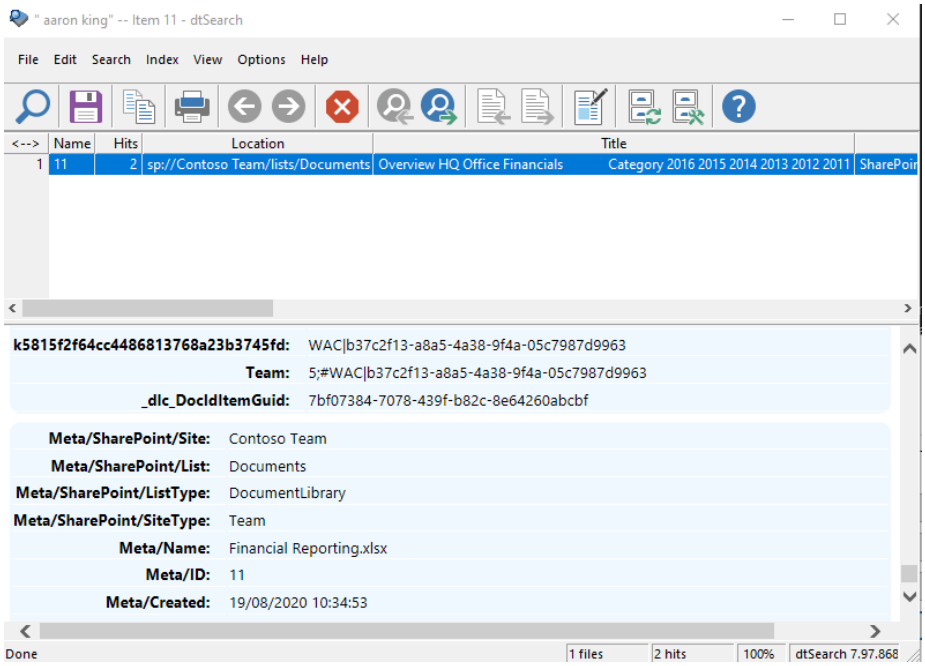
Open Index in dtSearch Desktop

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



The search dialog will open with the correct index already selected.

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



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

Quickly move between documents using Ctrl+Space or Ctrl+Backspace

See Enumerable Fields for more information.

Automatically Recognize Indexes

When the **Open index in dtSearch Desktop** button is pressed the search dialog of dtSearch Desktop is automatically opened at the index currently selected in 365 Indexer, ready for you to enter a search.

365 Indexer automatically creates and modifies Index Library (*.ilb) files whenever an index is created or modified, it also ensures that the main index library is registered with dtSearch Desktop.

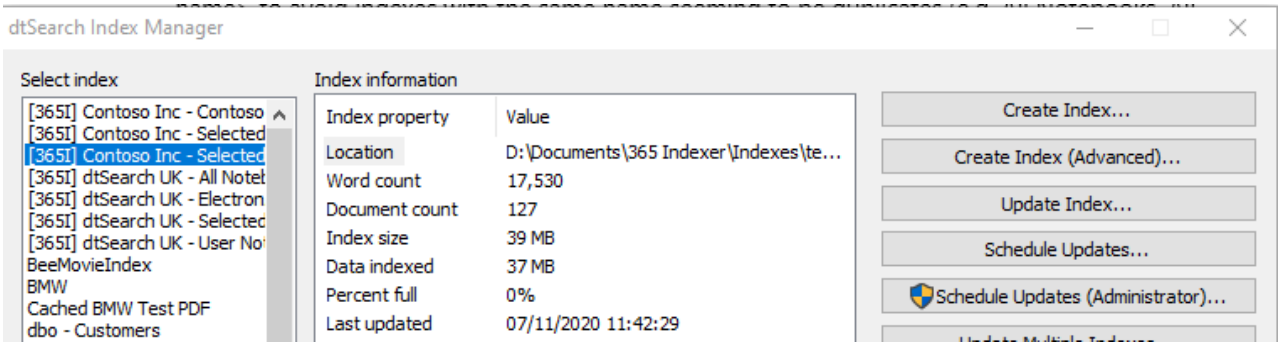
Several index libraries are created but not all apply to dtSearch Desktop:

- Documents\365 Indexer\365 Indexer.ilb is for dtSearch Desktop and contains every index created by 365 Indexer. Index names appear in dtSearch Desktop as <office name> - <index name> to avoid indexes with the same name seeming to be duplicates (e.g. All Notebooks, All Notebooks in different office accounts).

- Documents\365 Indexer\Indexes\<office account>\<office account>.ilb is for Universal REST Search so that REST Server can have greater control over what is searchable to who.

Index Manager

Index Manager in dtSearch Desktop automatically lists all indexes created by 365 Indexer, so that you can examine the index size, document count, etc. In Options > Preferences > Accessibility, check the box to "Use compact resizable dialog boxes = Always", and expand the width so that you can see indexes with long names. (dtSearch 2024.01 or later)



CAUTION: All indexes created by 365 Indexer can be identified by their **[365I]** prefix. You should NOT attempt to update, schedule, or rename these indexes from dtSearch Desktop.

SECURITY: When an administrator logs onto a shared computer where 365 Indexer is installed, and dtSearch Desktop is installed for **all users**, if indexes are automatically added to dtSearch for **all users**, some users who may not have permission to view documents in the 365 account would be able to view the documents, because they are cached in the Index. 365 Indexer ensures that the dtSearch Index Libraries are only automatically added to dtSearch Desktop for the logged-in user.

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Stored Fields

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

In 365 Indexer 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 the data in all the fields is searchable. The limits described above apply only to fields that are copied into the index and returned in search results.

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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**

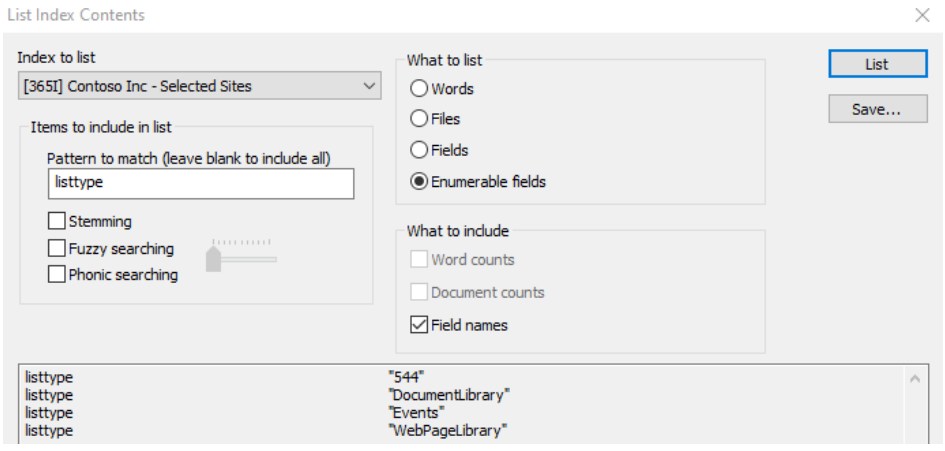
SharePoint

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.

List Index Contents in dtSearch Desktop

In dtSearch Desktop you can see a list of the Enumerable fields and other index data by choosing **List Index Contents** from the **Index** main menu. To list enumerable fields:



From **Index to list**, select the index.

From **What to list** select **Enumerable fields**

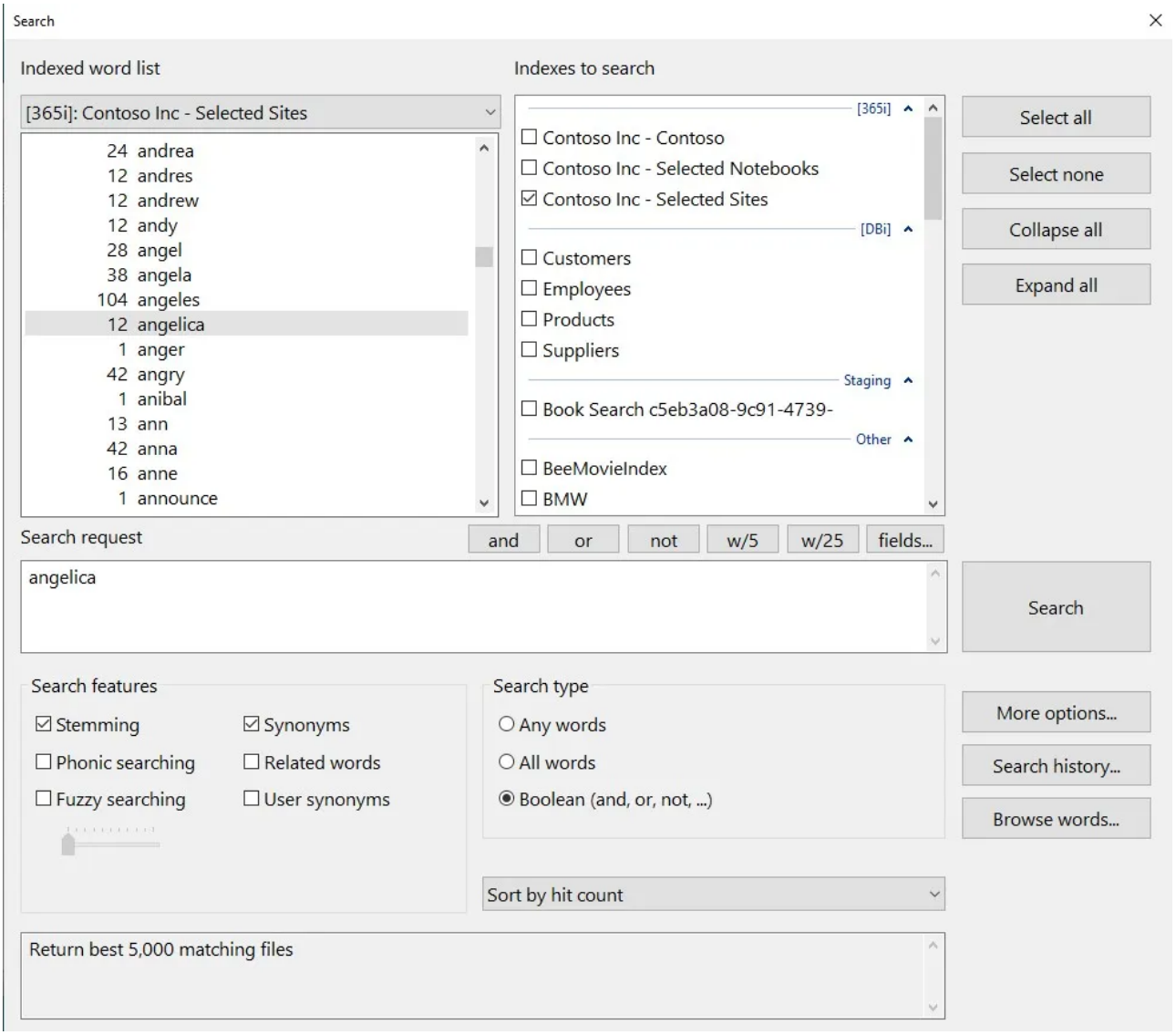
In **Pattern to match** optionally narrow down your search as shown

Press **List**

Index Groups

dtSearch Desktop 2021.02 and later has an index Group feature. To enable this option, click **`Options > Preferences > Search Options`**, and check the box to "Show indexes by group".

When groups are enabled, if an index name contains a colon, then the part before the colon is the group. The indexes created by 365 Indexer 1.2 and later are prefixed [365i]: (Earlier versions were pre-fixed [365i] without the colon, old indexes with this format will be automatically renamed.)



Microsoft Graph API 5000 limit

365 Indexer uses the Microsoft Graph API to access the OneNote Document Library; currently due to a limitation of the Graph API, Notebooks that are stored inside document libraries containing more than 5,000 items (e.g., a user's OneDrive) cannot be indexed by 365 Indexer.

365 Indexer will warn you if one or more Notebooks cannot be indexed due to this issue.

To index the Notebooks, move them to a document library containing less than 5000 items. This might mean moving the file to another user's OneDrive or moving the file into a SharePoint Documents Library containing less than 5000 items.

Depending on which version of OneNote is used to create the Notebook, the Notebook format and save location changes.

	OneNote for Windows 10	OneNote 2016 and prior versions of OneNote
Installed with	Windows 10	Microsoft Office 2016
How Notebooks are stored and accessed	Not accessible as files on the computer. Stored and accessed using Cloud APIs	Stored as `.one` files on the computer, by default found in C:\Users\<Username>\Documents\OneNote Notebooks (Default Location can be changed in application settings) Accessed by Microsoft Graph API through OneDrive Document Library

The limitation will affect indexing of Notebooks created by the older OneNote 2016 saved into OneDrive with more than 5000 files and folders, and Notebooks created in SharePoint sites with large document libraries exceeding 5000 items.

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Get Help

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

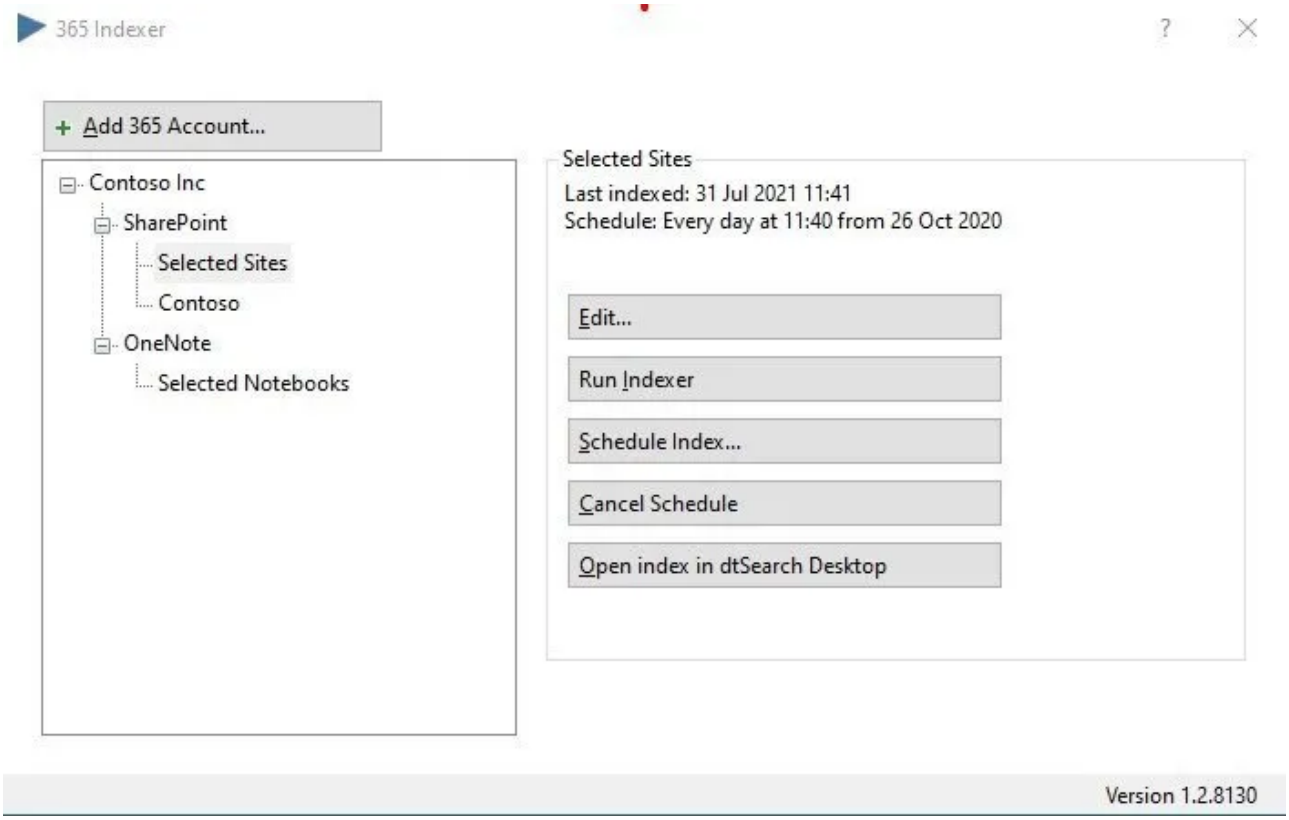
Settings

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

Accessibility

365 Indexer supports keyboard only operation:

Hold the **Alt** key or **F10** down to display keyboard shortcuts, e.g., in the image below **Alt+E** will open the Edit dialog, **Alt+I** will run the indexer.



TreeView:
Press **Tab** or **Shift+Tab** to navigate in or out of the TreeView. Navigate the tree nodes by using the directional arrow keys. Press the **Menu** key, use arrow keys to select **Rename** or **Delete**. Press **Enter** to select

F1 - shows About dialog - contains your Serial Number for support and a link to online help.

Tab to navigate to any link or button and **Enter** to select any item in a dialog.

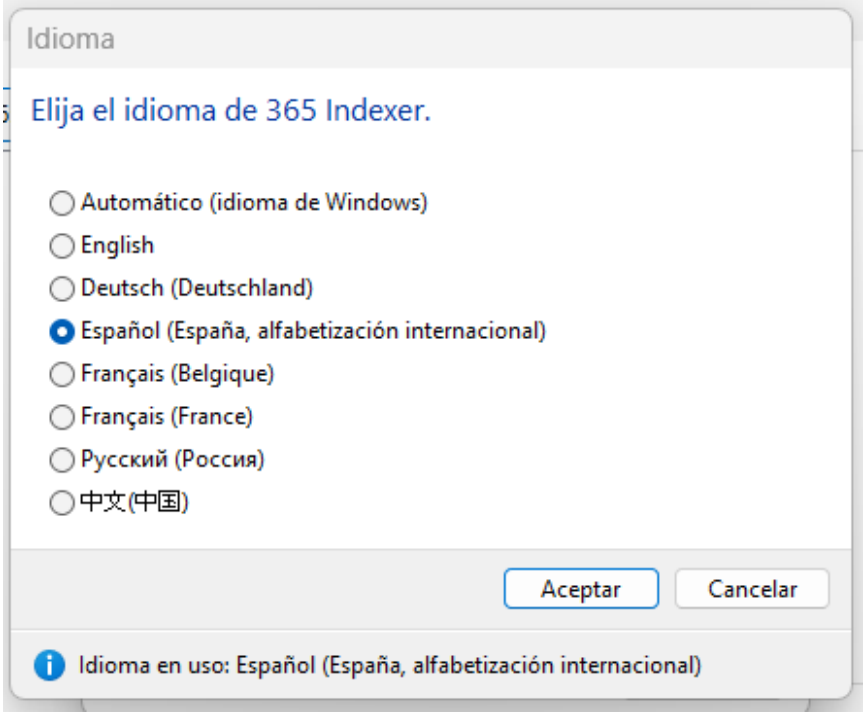
Esc closes a dialog.

ALT + Spacebar + M to move the application window using the arrow keys.

ALT + F4 to close the application

Translation

The default language of the user interface is English. If IT Admin have not set the language centrally, from the About dialog you can choose Automatic to match the Windows language; If the language is not available it will revert to English.



You can also choose from any of the installed .lang file.

To add other languages, make a copy of the **qps-ploc_365_Indexer.lang** file in the **\I18N** subfolder.
Place the untranslated copy of that 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 365 Indexer will automatically expand to accommodate the length of the text.

Translate the appropriate text using a text editor*, save it in utf-8 format (we recommend 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 or in the i18n folder and the UI will be translated the next time you restart 365 Indexer.

*Our free **Language File Editor** Is suitable.

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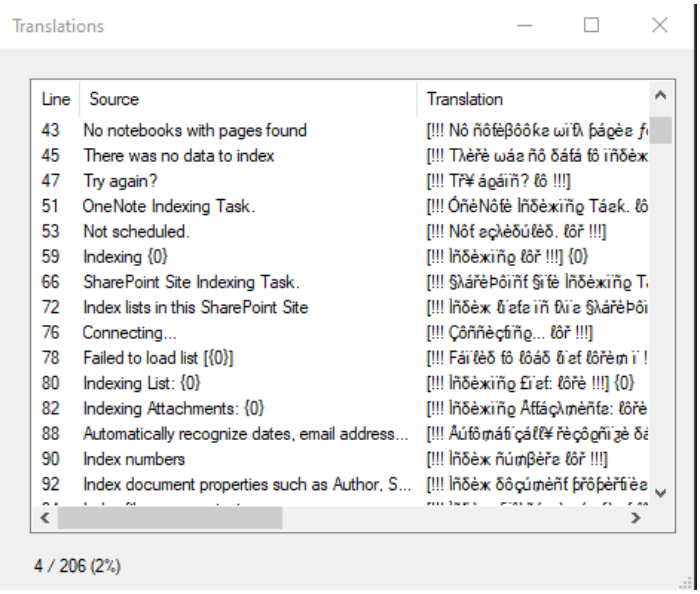
To assist translators, 365 Indexer can be run with a command line **-t.** This will display the list of phrases to translate, as each line is translated and the surrounding [[ ]] are removed, it will indicate what number and percentage of lines are translated.



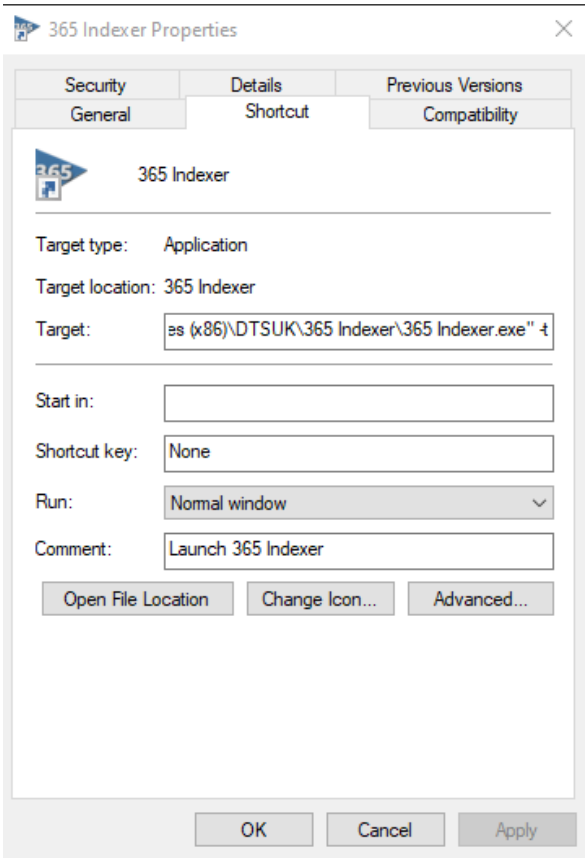
Note; Edit the RFC4646 line to ensure it uses the correct date format.

Note: The .lang files supplied have been automatically translated using Microsoft's standard terms, feedback is welcome from native speakers.

If you experience any issues translating the user interface or would like to provide feedback, please contact support@dtsearch.co.uk.

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**



This method can be problematic on Windows 11. If you cut and paste text, it may try to add extra quote marks.

We recommend you open a command window (Win + R, then type `cmd` and press Enter) then enter: **cd "C:\Program Files (x86)\DTSUK\365 Indexer\365 Indexer.exe" -t**

Troubleshooting

"Need admin approval" when adding an account

After you sign in with **Add 365 Account**, a window titled "Consent Required" shows "Need admin approval – 365 Indexer Enterprise needs permission to access resources in your organisation that only an admin can grant".

This happens even when your IT Administrator has already granted all the permissions in the Entra portal: 365 Indexer opens a Microsoft admin consent page as part of account setup, and only an administrator can complete that page. Your sign-in itself has succeeded (it shows as successful in your organisation's sign-in logs). This step will be removed in a future update. Until then:

1. If this is not your first attempt to add the account, first remove any certificate left over from the earlier attempt (see The certificate dialog did not appear below).
2. Click **Add 365 Account** and sign in with your own account as usual.
3. When "Need admin approval" appears, ask your IT Administrator to click **Have an admin account? Sign in with that account** in that same window, sign in with an account holding the Global Administrator, Cloud Application Administrator or Application Administrator role, and approve.
4. Account setup continues under your own account, and the certificate dialog appears. Send the .cer file to your IT Administrator as described in Add a Microsoft 365 account.

If you click **Return to the application without granting consent**, account setup stops and the account is not added. You can try again at any time.

If the window shows a different message, or the problem persists after an administrator has approved, ask your IT Administrator to check that all permissions in the IT Admin Guide have admin consent, and to send us the error code from your sign-in (shown under Troubleshooting details at the bottom of the window, or in Entra under Sign-in logs).

The certificate dialog did not appear / I can't find my .cer file

365 Indexer creates your installation's certificate during **Add 365 Account**, and shows the certificate dialog only when it creates a new certificate. If an earlier attempt to add the account did not finish (for example at the "Need admin approval" window), the certificate was created but the dialog never appeared, and the next attempt reuses that certificate without showing the dialog.

If your IT Administrator has **not** yet registered a certificate for you:

1. Close 365 Indexer.
2. Press Windows+R, type **certmgr.msc** and press Enter.
3. Open **Personal** → **Certificates** and delete any certificate whose name begins "365 Indexer - ".
4. Open 365 Indexer, remove the account if it appears in the tree view, and click **Add 365 Account** again. A new certificate is created and the dialog shows where the .cer file was saved (your %TEMP% folder).

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Do not delete the certificate if your IT Administrator has already registered it – indexing would stop working until they register a new one. A registered certificate does not need to be sent again, which is why the dialog does not appear when you remove and re-add an account.

"Index with that name already exists"

If you remove a Microsoft 365 account and then re-add it, you may see this message when trying to recreate an index with the same name as before. This happens because the previous index folder still exists on disk even though the account registration was removed.

To resolve it, either:

- Choose a different name for the new index, or
- Browse to the index folder location (shown in the index creation dialog) in Windows Explorer and delete the old folder manually before creating the new index

The "Remove Account" dialog includes an option to also delete index files from the filesystem at the time of removal, which prevents this situation from occurring.

"My indexes have disappeared from the tree-view"

If you removed an account and re-added it, the index registrations (the app's record of which indexes exist and their schedules) are not automatically restored. The actual index data on disk is still there; nothing has been deleted. You need to reconnect the index:

How to reconnect an existing index

1. Select the SharePoint or OneNote node in the tree-view and click **Create Index**.
2. Select the option to **reconnect an existing index**, click **Next.**
3. On the page that opens, **Browse…** to the index folders under the SharePoint or OneNote folder. Select the index folder itself – click **Select Folder**. The Name and location fields will update automatically.
4. Verify the Name and Location are as expected. Click **Next >** and **Save**. All your previous indexing options will be restored.

"My Indexes show my email address instead of my organization name in dtSearch Desktop"

See the Appendix – Beta versions – this should only affect a small number of beta testers.

Feedback

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

Appendix

This is a draft document issued prior to release of 365 Indexer Enterprise 3.4 (currently in beta testing). If you notice any errors or omissions, please contact support@dtsearch.co.uk please cite the page number and date of the document.

Previous beta version installs

If you are upgrading from 365 Indexer 2.3 or 2.4 (beta)

Certain beta builds of version 2.3/2.4 dated in June/July 2026 may give rise to "My Indexes show my email address instead of my organization name in dtSearch Desktop" It is corrected automatically when you upgrade to version 3.4 or later - on first launch after upgrading, 365 Indexer will detect the missing organisation name and migrate all index paths and display names automatically. No manual action is required.

If after upgrading the email address still appears, remove and re-add the account.
Before doing so, note down the names and locations of your existing indexes so you can reconnect them afterward – see How to reconnect an existing index in the Troubleshooting section.

Changes since 5 Aug 2026 Issue:

NOTE (References to certain builds do NOT mean they have been publicly released, they may be builds for internal or limited release. Ensure that any builds you obtain are from signed setup.exe or signed .msi files).

- Added new section Cancelling an Index Update (From build 3.4.9733)
- Corrections to first para in Set Index Name & Location
- Added note about Microsoft login dialog in Create a OneNote Index

Changes since 24 Aug 2026 Issue:

- Add a Microsoft 365 account: one extra sign-in after upgrading from an earlier beta, and a note about expanding sites before the certificate is registered. (From build 3.4.9763)
- Create a SharePoint index: new screenshot. 'Index all' means all sites approved for you, including sites approved later.

Changes since 25 Sep 2026 issue:

- Translation - user choice of language options.

Changes since 3 Oct 2026 issue:

- Add a Microsoft 365 account - note about the "Need admin approval" window, and where the .cer file is saved.
- Troubleshooting - new sections "Need admin approval" when adding an account and The certificate dialog did not appear.