Database Indexer 1.4

User Guide

Contents

Installation 3

Accessibility 4

Translation 5

Getting Started 6

Add a New Database 7

MS SQL SSL Options 8

MySQL SSL Options 9

Add a data source 10

Field Display Names Option 11

Set Indexing Options 12

Custom Indexing Options 13

Default Indexing Options 14

Run Indexer 15

Schedule the Index updates 16

Remove an index 17

Rename an Index 17

Automatically Recognize Indexes 18

- Index Manager 18

Incremental Index Updates 19

Custom Queries 20

Document Extraction 21

Enumerable Fields 22

List Index Contents in dtSearch Desktop 23

Index Groups 24

Connecting to Azure SQL Database 26

- Set up Firewall 26

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Option 1. Creating an IP Firewall Rule 26
Connecting to Amazon Aurora and RDS 27
Before you start 27
Create a read-only database user 27
Option 1. Connect directly (Standard TCP/IP) 27
SSL for Aurora and RDS 28
Option 2. Private database through an SSH server 28
Aurora Serverless databases that pause 28
Amazon RDS for SQL Server 29
If the connection fails 29
Troubleshooting 29
Get Help 31
Settings 31
Feedback 31
Appendix 32
Changes since 22 April 2022 32

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Installation

Database Indexer is an add-on product for use with dtSearch Desktop or dtSearch Network 2021.02 or later.

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

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

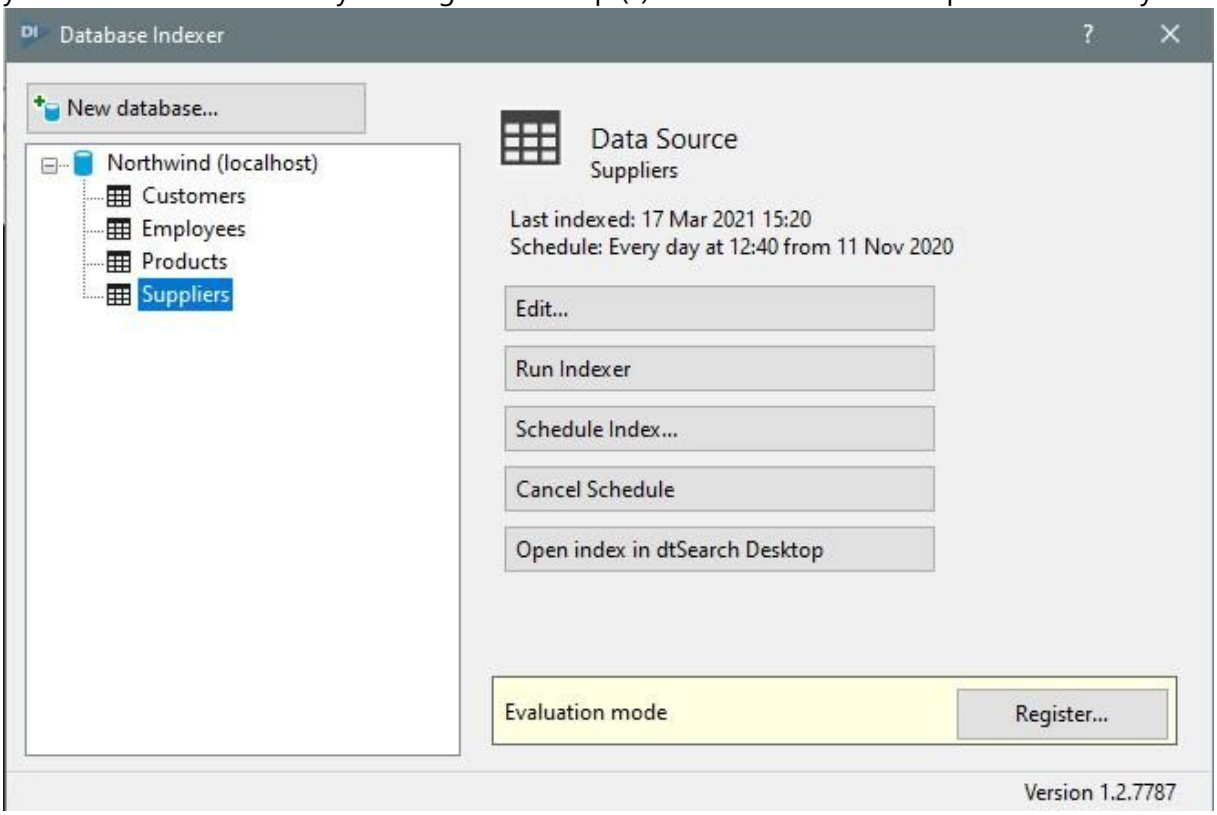
IMPORTANT: Before installing any **beta** build, from Windows Control Panel, uninstall previous versions from the machine. Ensure that the install folder is completely empty before installing the beta version.

Evaluation mode

Evaluation mode is limited to 10,000 rows per index and scheduled indexing is not functional.

We have some small demonstration online databases available that can be used in evaluation mode, details are in the Appendix.

To remove the Evaluation mode 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 or press the F1 key.



Accessibility

Keyboard only operation:

Hold the **Alt** key or **F10** down to show available keyboard shortcuts.

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.

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

ALT + F4 to close the application

Esc closes a dialog.

TreeView:

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

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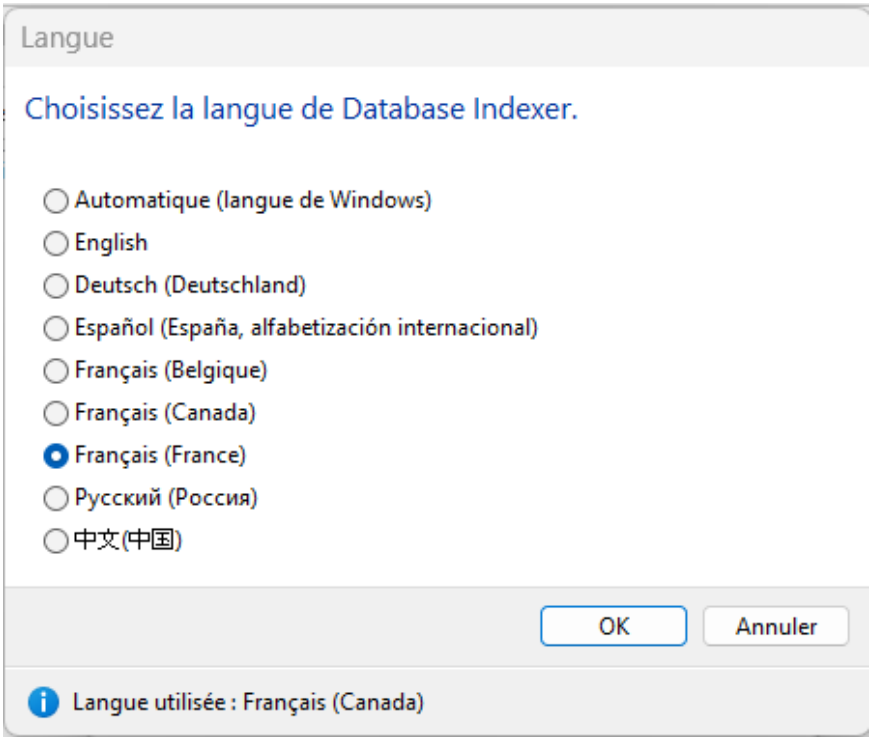
Translation

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 it is not available it will revert to English.



You can also select from any of the installed .lang files.

To add other languages to the user interface, make a copy of the **`qps-ploc_database_indexer.lang`** file which is in the **`\I18N`** subfolder.

Place the untranslated copy of that file in the same folder as the **`Database Indexer.exe`** file and run Database Indexer, you will see all the English text is replaced by pseudo-language with a width 30% wider than English to account for 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 Database Indexer.exe or in the i18n folder and the Ui and the UI will be translated the next time you restart Database Indexer.

To assist translators, Database 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

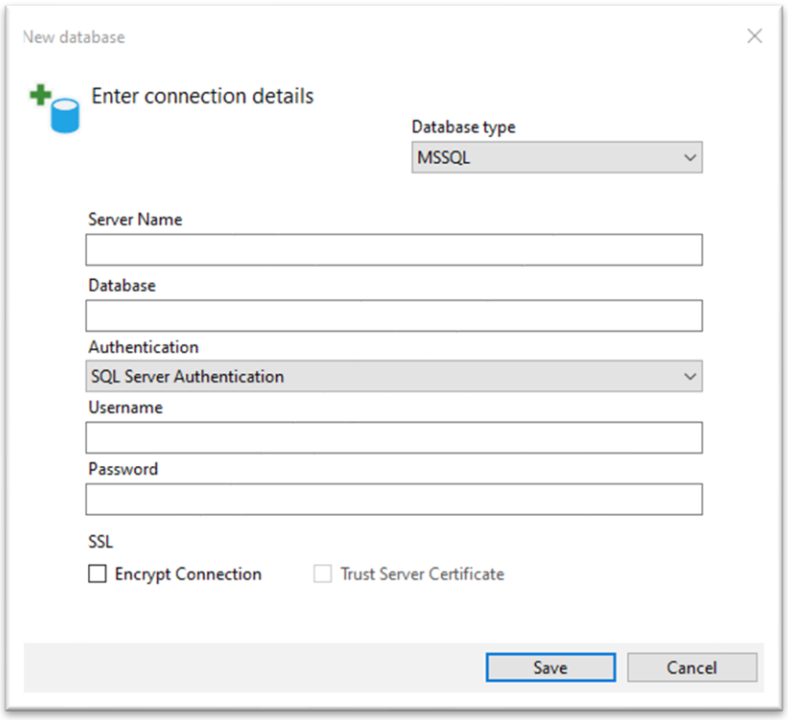
- Add a New Database
- Add a Data Source
- Set the index options
- Set a schedule for the index updating if needed.

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

Add a New Database

Select the **database type** from the drop-down list, enter the requested parameters of your database then **Save** your settings.

The images below show the options for the MS SQL and MySQL database types.

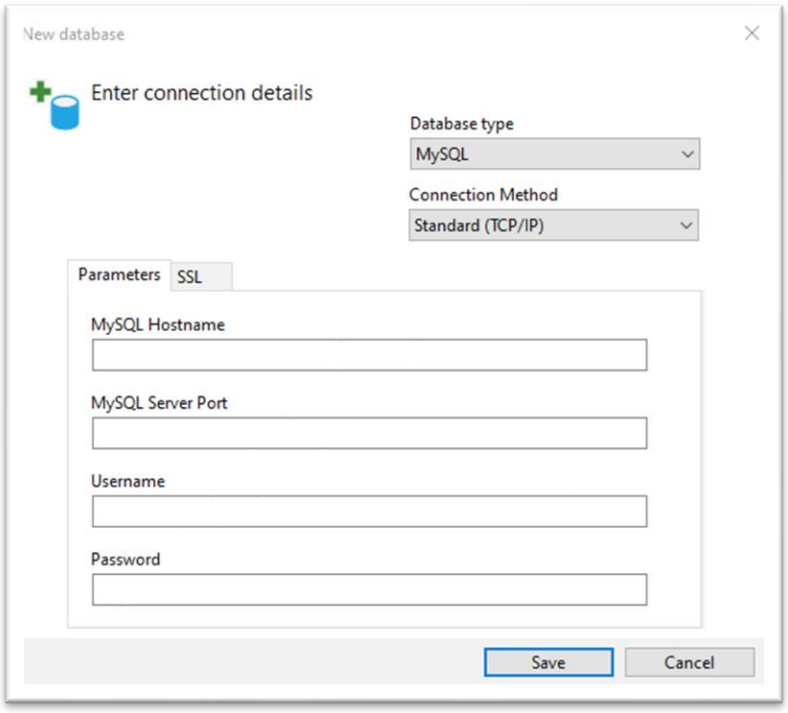


MS SQL database type

Select **Authentication** from **SQL Server Authentication** or **Windows Authentication**

Optionally for SSL select **Encrypt Connection** see

MS SQL SSL Options



MySQL database type

Select **Connection Method** from **Standard (TCP/IP)** or **Local Socket/Pipe** or **Standard TCP/IP Over SSH**

SSL/TLS is used with Connection Method Standard (TCP/IP).

By default, new MySQL databases support SSL and generate their own self signed certificates.

Select the **SSL** tab to set the MySQL SSL options

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MS SQL SSL Options

Choose **Encrypt Connection** and optionally **Trust Server Certificate**.

Encrypt Connection	**Trust Server Certificate**	Behaviour
OFF	IGNORED	**(Default)** Database Indexer will not use SSL to encrypt the connection with the database, nor check the authenticity of the server. The connection will fail if the installed SQL Server has been configured with the 'Force Encryption' flag (not enabled in a default SQL Server installation)
ON	OFF	The connection will be encrypted, and Database Indexer will check the validity of the Server Certificate to ensure the authenticity of the Server. The server must have a Valid Certificate for its Server Name from a Certificate Authority the computer trusts such as a paid certificate provider or a self-signed certificate that the computer has been configured to trust. The SSL Certificate must also have the **Server Authentication** purpose to be considered valid.
ON	ON	Database Indexer will use SSL to encrypt the connection but will not check the authenticity of the server.

The most secure SSL option is to select **Encrypt Connection** but not **Trust Server Certificate.**

By default, new SQL Server installations generate and use a self-signed SSL certificate that is not trusted by Database Indexer because the certificate does not come from a trusted Certificate Authority (**CA**); in this case check **Trust Server Certificate** to bypass checking the authenticity of the certificate, because that is the only way to connect; often this is good enough for a server installed on the local machine or on the local network.

To connect with **Trust Server Certificate** turned off, SQL Server must be configured with a certificate from a trusted CA. The process for getting a trusted certificate and installing it on SQL Server requires a network administrator to create a Certificate Signing Request (CSR) and a private key, then purchase a certificate from a trusted CA such as Comodo, GeoTrust, etc. and configure SQL Server with the certificate. Details are here:

https://www.ssltrust.co.uk/help/setup-guides/securing-microsoft-sql-server-with-ssl

SSL under MSSQL does not require any files to be configured. When not trusting the Certificate, it uses the Windows Certificate Store to check that the SSL Certificate comes from a trusted CA.

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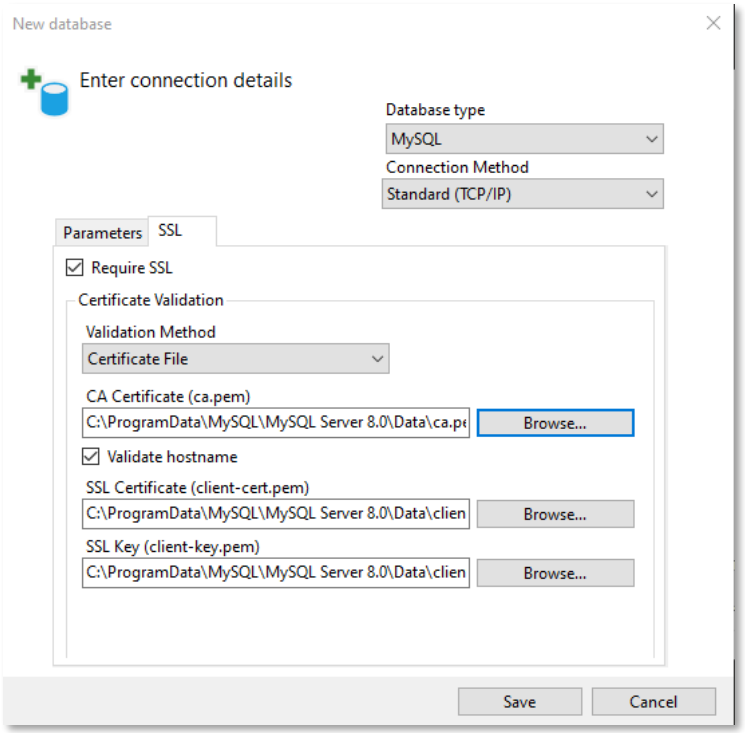
MySQL SSL Options

Unlike MSSQL, when validating the certificate MySQL does not use the Windows Certificate Store to check the Certificate Authority (CA), instead it requires that the trusted certificate is on the local machine in **.pem** format. PEM is a container format for certificates and keys.



Check **Require SSL**

From **Validation Method** select

No Validation or

Certificate File and Browse…

to the CA certificate .pem file.

Optionally check **Validate hostname** and Browse… to select the SSL Certificate client-cert file, then Browse… to select the client-key file

By default, on new MySQL Server installs a self-signed certificate is created; the server acts as its own Certificate Authority when creating the SSL Certificate, the CA file is generated and can be found by default on the server path:

- **Windows** `C:\ProgramData\MySQL\MySQL <VERSION>\Data\ca.pem`
- **Linux** under `/var/lib/MySQL`

Copy this file to the computer where Database Indexer is installed, Choose **Certificate File** as the **Validation Method** and Browse… to that file.

Optionally the MySQL driver supports validating the host name of the certificate. All SSL Certificates have hostnames they are valid for; the self-signed certificate generated by MySQL is only valid for the computer's name. It will only validate if Database Indexer is installed on the same server as the MySQL Database and the computer name is passed as the hostname on the Parameters tab. The files client-cert.pem and client-key.pem by default can be found in the same location as ca.pem above.

Validate hostname if you are connecting to MySQL Server over the internet and want to avoid the possibility of impersonation; the system administrator would configure an SSL Certificate from a trusted authority similar to the steps mentioned in the MSSQL section, which is valid for the hostname that the server is on, e.g. if the server is at `db.example.com` the SSL Certificate needs to be for that hostname.

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Add a data source

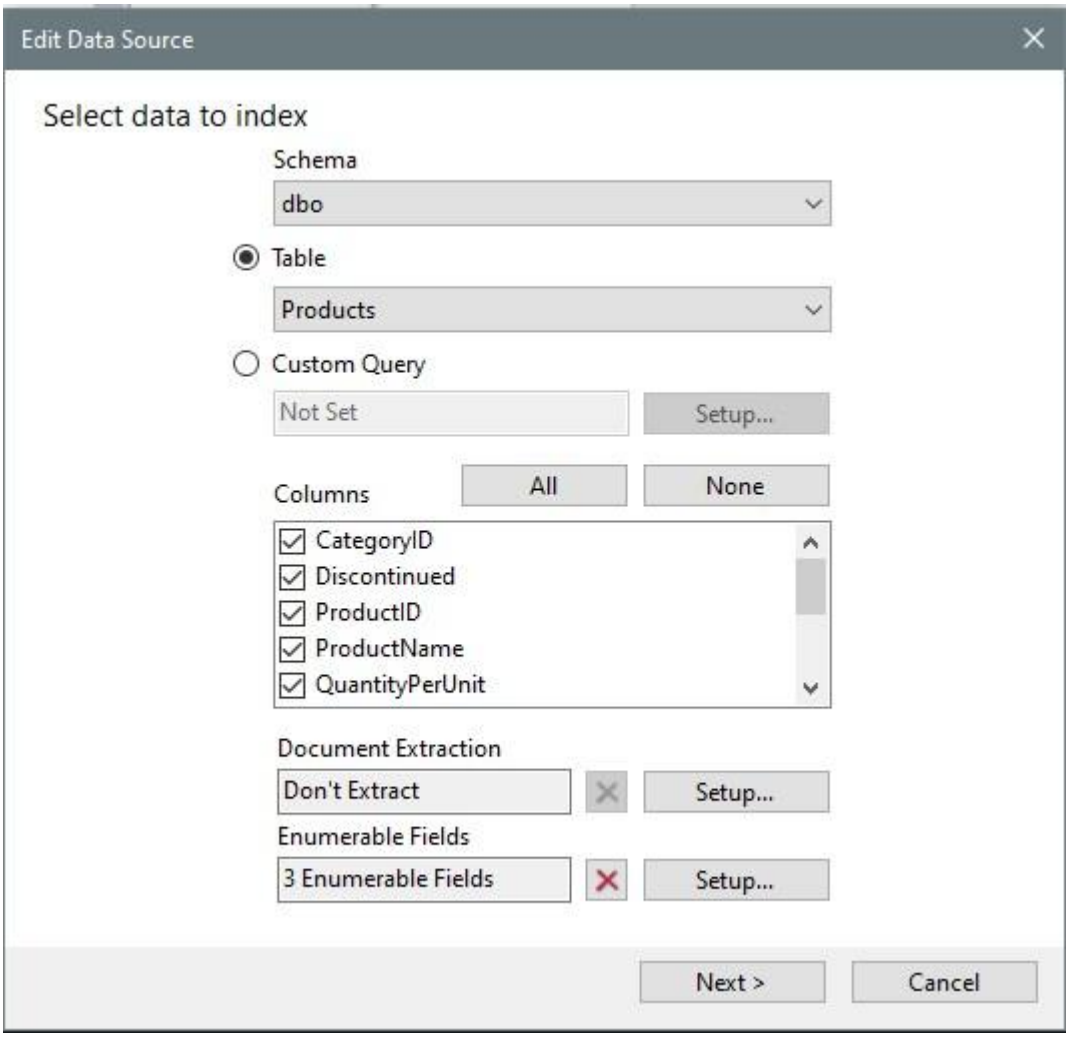
After you have added a new database, select it from the list and press the **New Data Source** button.

Select the **schema** from the drop-down list.

Choose to select a **Table** or create a **Custom Query**.

If any of the columns contain a document or file path to a document, you might want to set up **Document Extraction** so that it is displayed faster from search results.

If the data source contains columns that can be enumerated, you might want to set up **Enumerable Fields** to provide faceted search navigation.

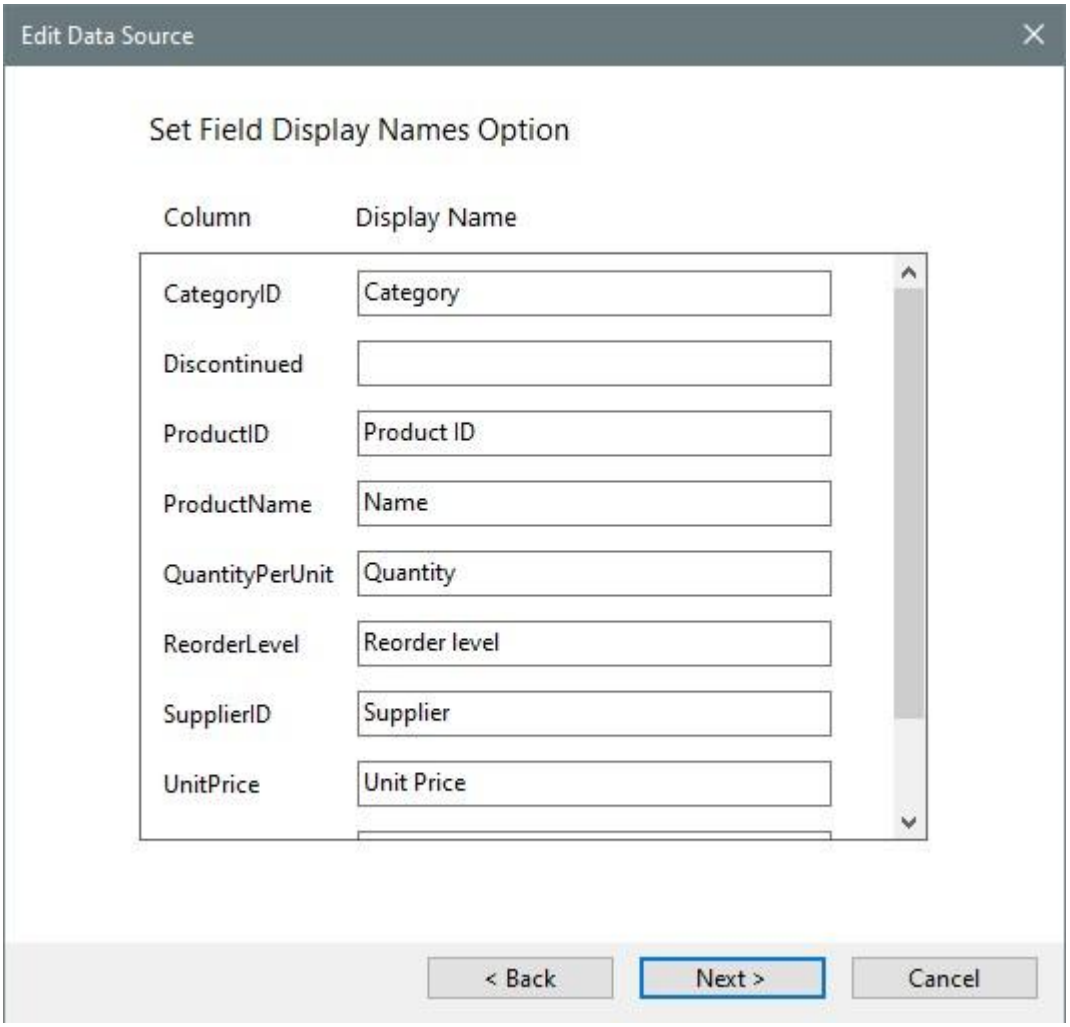


When finished click the **Next >** button to optionally set up user friendly Field Display Names and setup the index options.

Field Display Names Option

You can optionally enter user friendly “display names” for each field as shown in the example below.

Click **Next >** when finished.



These user-friendly Display Names will appear in dtSearch Desktop Search Dialog in the **fields**… drop-down list and in the Fields… list in the Universal Search Client.

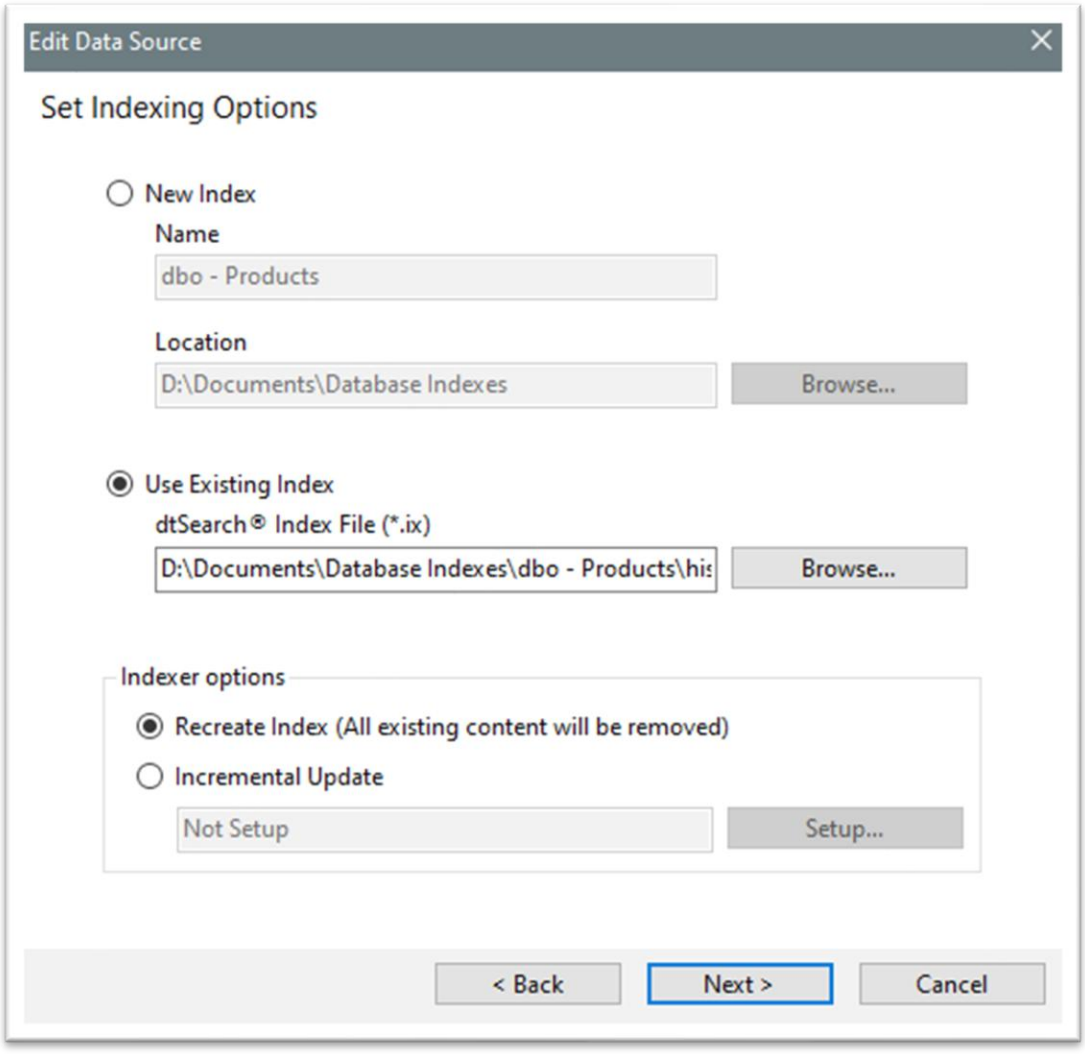
Set Indexing Options

You can create a **New Index** or **Use an Existing dtSearch index**. The index name can consist of several words and can contain spaces.

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

CAUTION: If you choose **Use Existing Index** and select **Recreate Index** any data not previously indexed by the Database Indexer will be lost. (The software will also warn you if you select this option)

Incremental Update requires a column in the table that has a Last Modified Date. Database Indexer needs read-only permission to the database. Incremental updates are recommended where possible to reduce database activity.

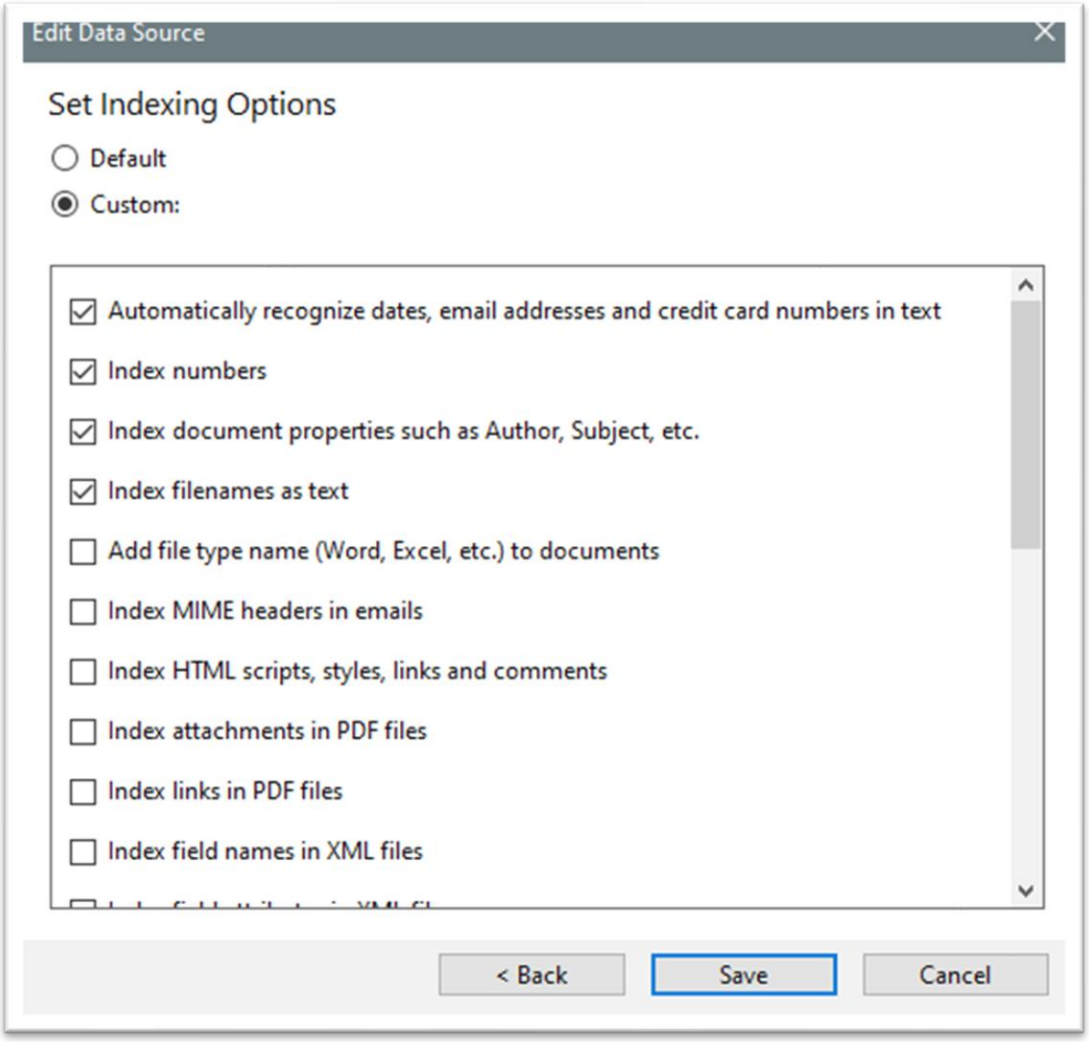


Finally press the **Next >** button and choose Default or Custom indexing options

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

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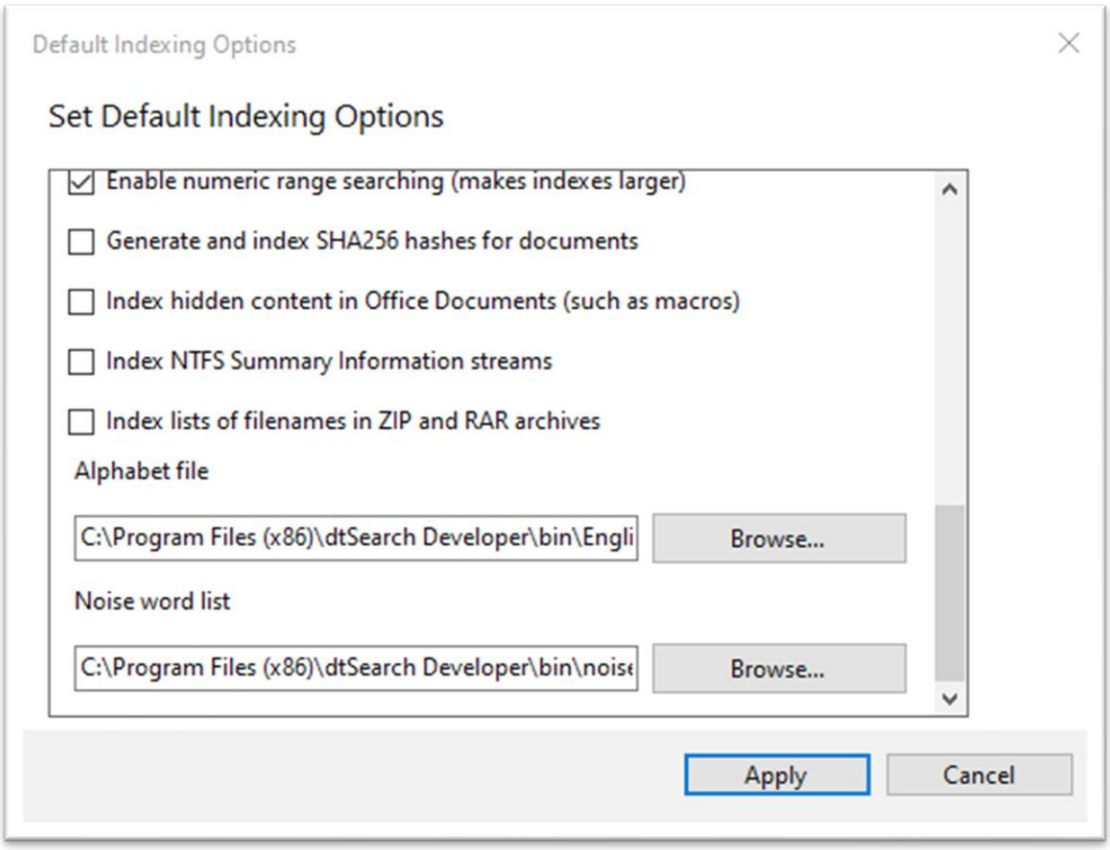
Default Indexing Options

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.



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.

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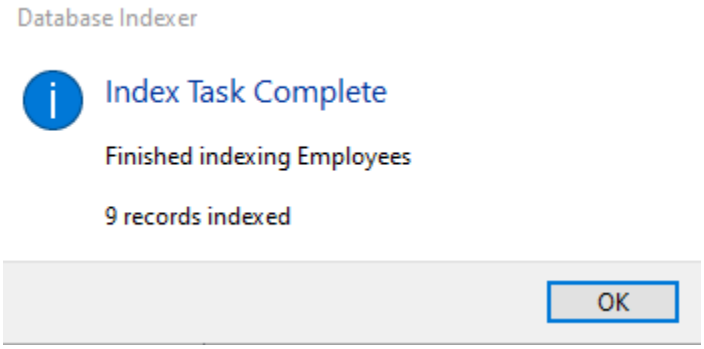
Run Indexer

After you create an index, we recommend you manually run the indexer before setting up a schedule.

This is particularly important with very large databases, 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, when complete it will show a message box.



Note:

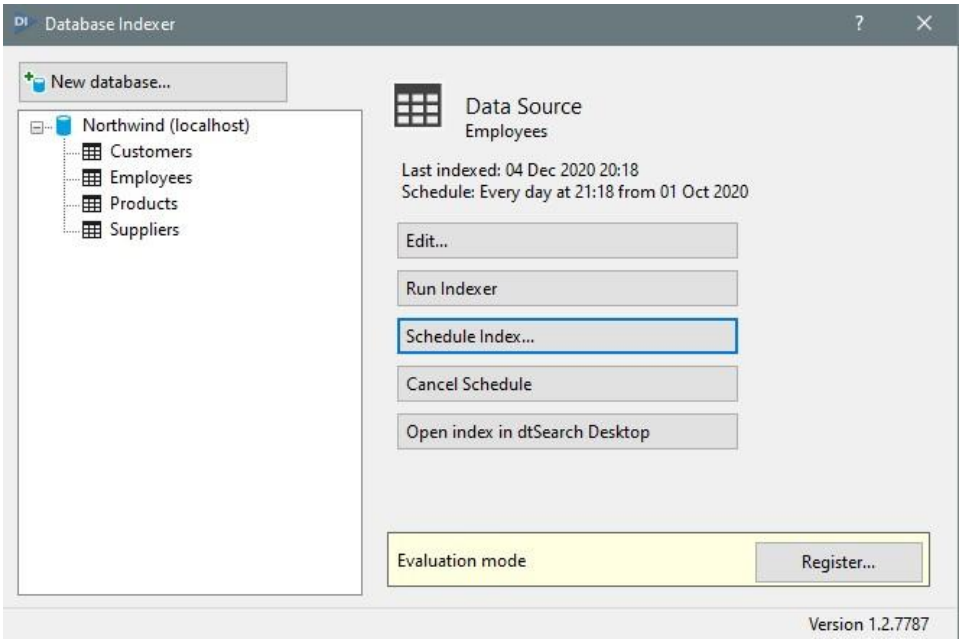
In scheduled mode it will not display message boxes. All events and errors are logged in the Windows Event Viewer.

If index options are set to **Incremental Update** the number of records indexed will be those that have changed since the last index update, this may be 0.

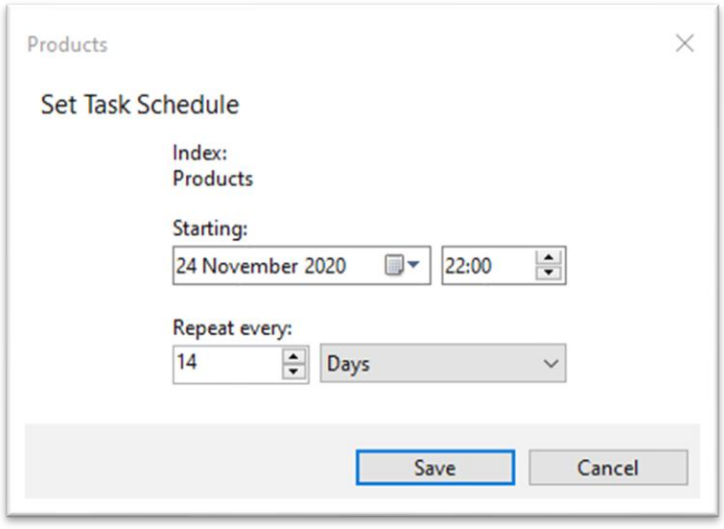
Schedule the Index updates

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 on **Schedule index...**



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

To rebuild or update the index daily, you need to ensure that it can be rebuilt or updated within 24 hours; for large databases rebuilding might not be possible within 24 hours, it is recommended to use incremental updates on a scheduled basis.

Note: This feature is not available in evaluation mode

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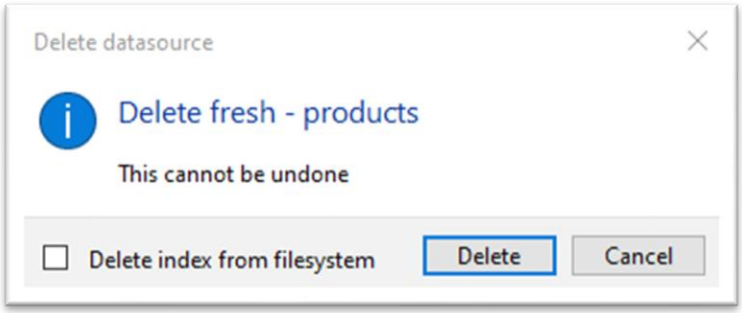
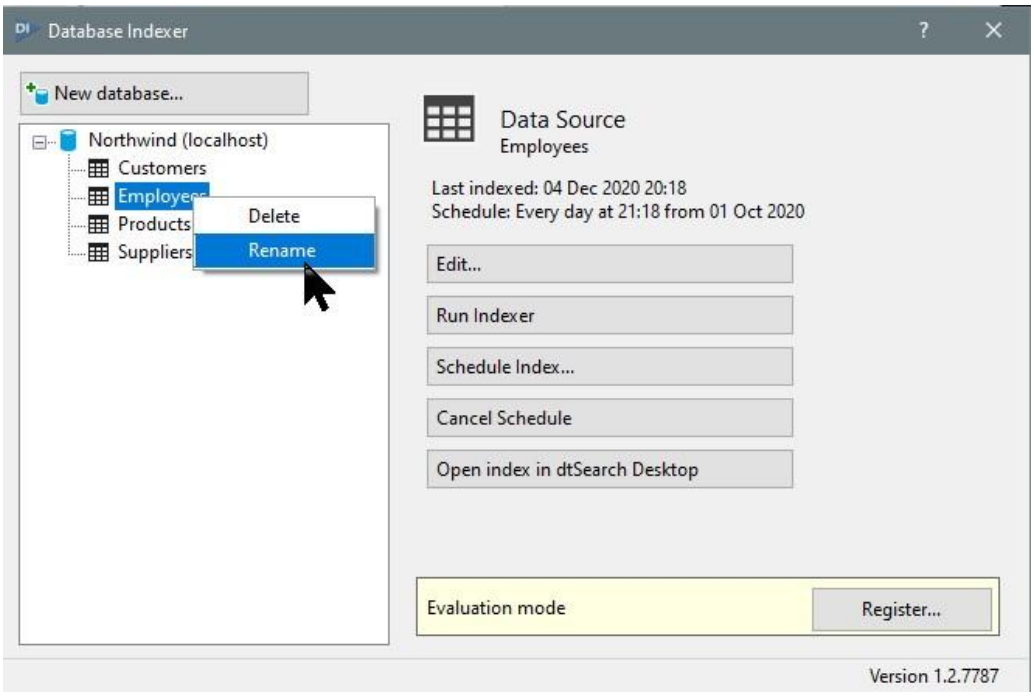
Remove an index

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.

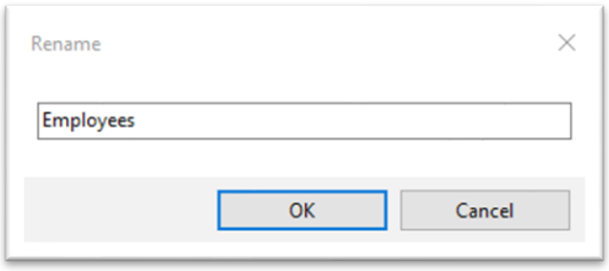


Rename an Index

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



(New in 1.2)



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Automatically Recognize Indexes

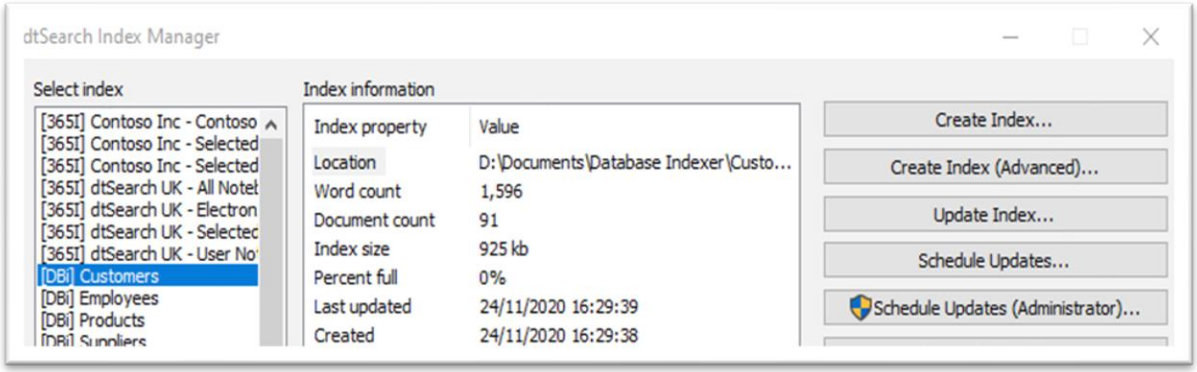
When the **Open index in dtSearch Desktop** button is pressed the search dialog of dtSearch Desktop is automatically opened at the index currently selected in Database Indexer, ready for you to enter a search.

Database 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.

Index Manager

Index Manager in dtSearch Desktop automatically lists all indexes created by Database Indexer, so that you can examine the index size, document count, etc.

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



- **Created** date / time is when the initial manual Run Index was started; if you have chosen to use incremental updates this will not change. If you have chosen Recreate Index, this will represent the start time of the last update

- **Last Updated** time is when indexing finished

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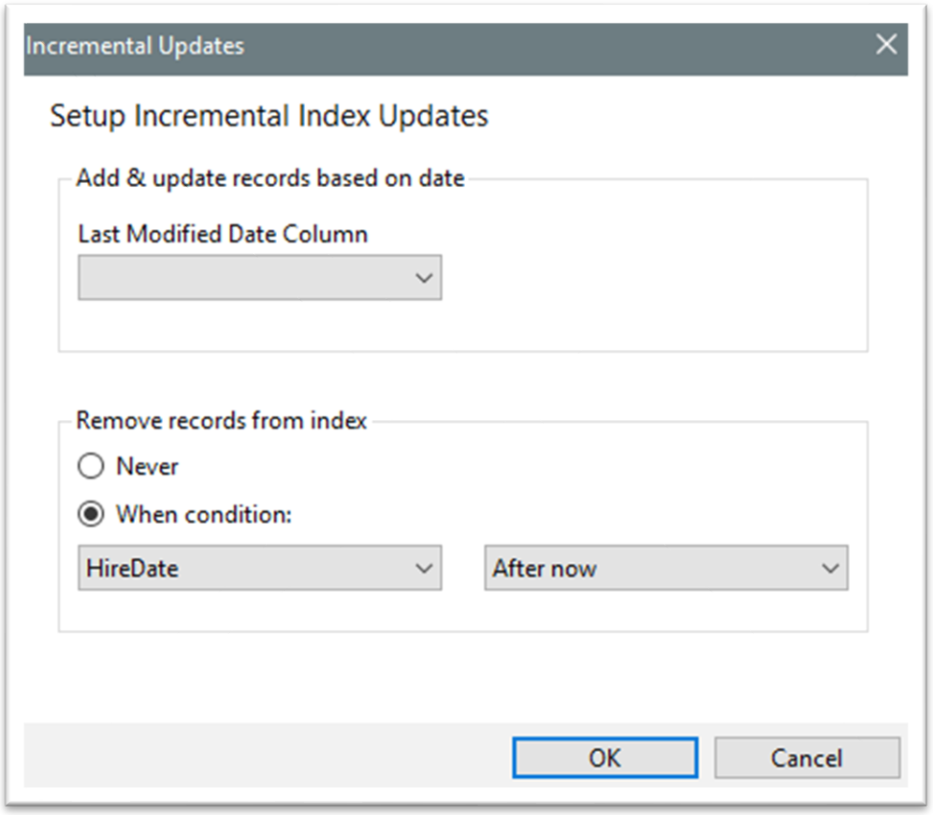
Incremental Index Updates

To set incremental index updates, select the index, then click on **Edit... Next > Next >** then select the **Incremental Update** radio button and click **Setup...**

Incremental index updates require a column in the table that has a Last Modified Date; only rows in the table that have a date change will be re-indexed. **Note:** Every record MUST have the 'modified' column set to the last modified (or created) date. Records that are set to NULL will not be indexed by database indexer.



Remove Records from Index

You can choose to remove records from the index when a certain condition is met. The options available are if the selected column contains a row with a true value: **`is null, is not null, After now, Before now, = 0, or =1.`**

Database Indexer never alters or deletes any data in the database itself and only requires read permission.

If you delete a row from the database, it will not remove the data from the index. To clear data from the index if records have been deleted requires the index to be rebuilt, see Indexing Options.

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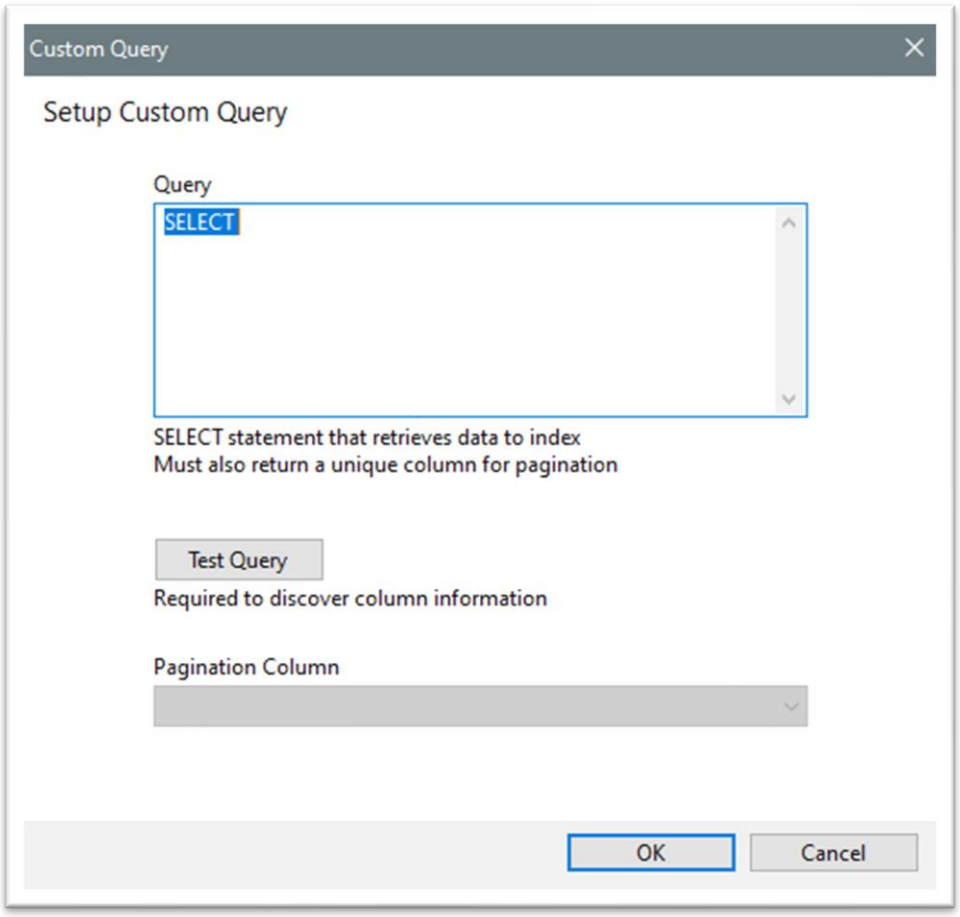
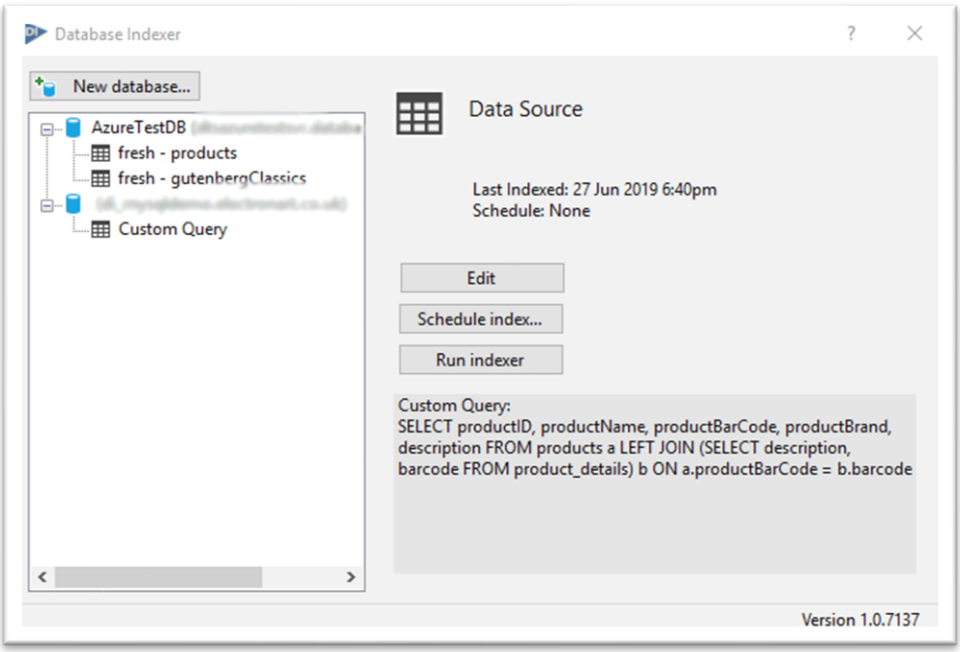
Custom Queries

Use the Custom Query option when data to be indexed spans multiple tables and/or to control what data is indexed when the table contains data that should be excluded from the index.





Example of setting up a Custom Query

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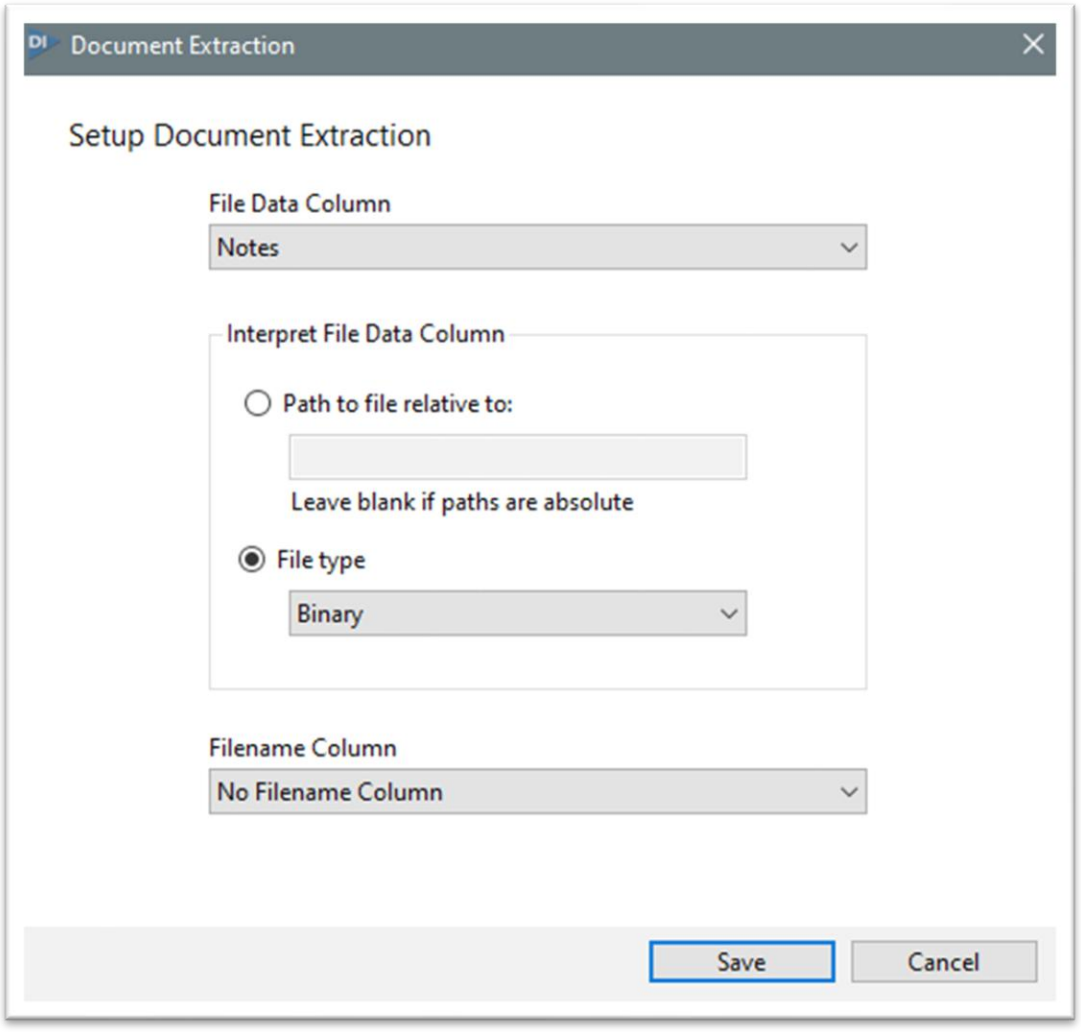
Document Extraction

Database Indexer treats all database records as field data by default. Extracted documents are treated as additional file data.

When Document Extraction is selected, both types of data are cached in the index as files, not text. For example, if a PDF file is stored in the database as binary data, the PDF file is cached in the index and can be viewed as a PDF file.



If your database contains embedded files or a column that contains a link to a file, you can choose to extract the file and store it in the index. This option will make files open faster after a search.

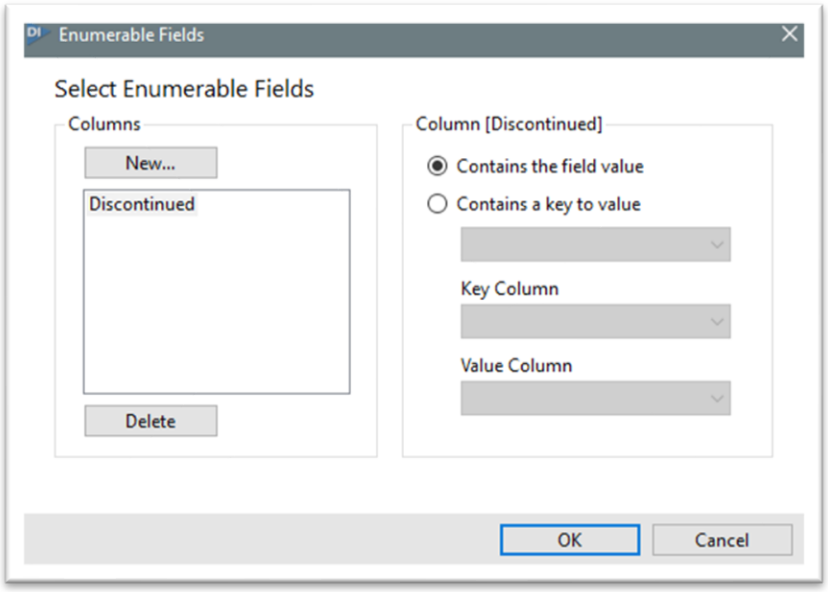
Enumerable Fields

Enumerable fields are used for categorizing search results into facets. Universal Search Clients can display faceted results or developers can use the Universal Search API to display faceted search results in their own application.

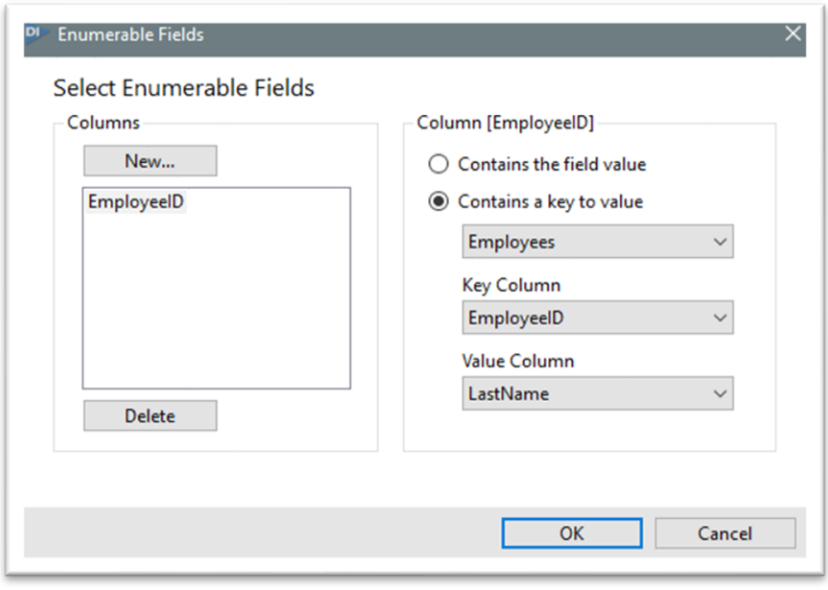
From the New Data source dialog click the **Setup...** button alongside the Enumerable fields option (or select an existing data source and click the **Edit...** button).

Click the **New...** button to add columns to the list to be used for faceted search navigation.

Select a column from the list and then select **Contains the field value** or **Contains a key to a Table** as appropriate.



Example 1:
"Discontinued" column contains a Boolean (true/false) value so **Contains the field value** is selected.



Example 2:
"Employees" table contains an EmployeeID column that is a Key to a LastName.

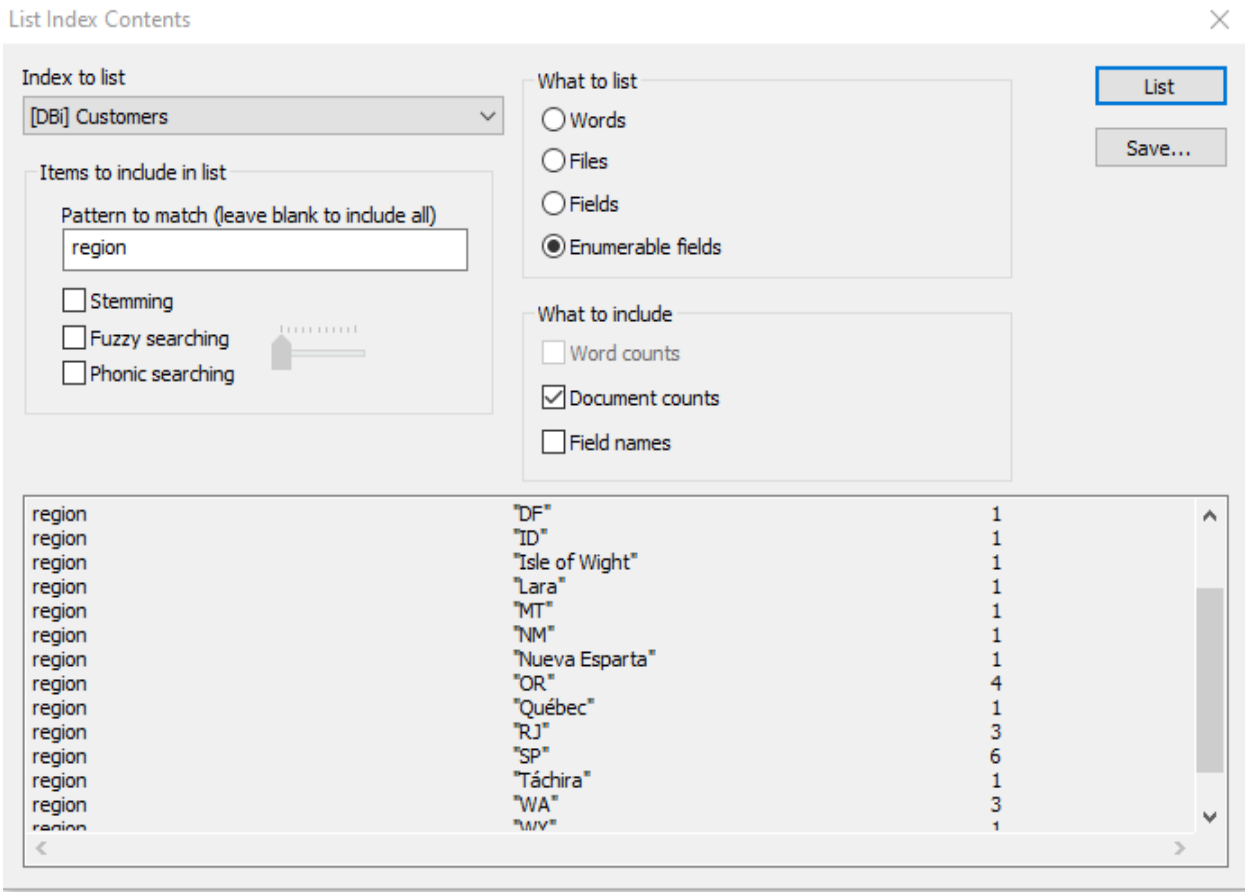
Finally to remove any unwanted items in the list select an item and click the Delete button.
See also: https://support.dtsearch.com/faq/dts0222.htm

List Index Contents in dtSearch Desktop

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

For example, 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**



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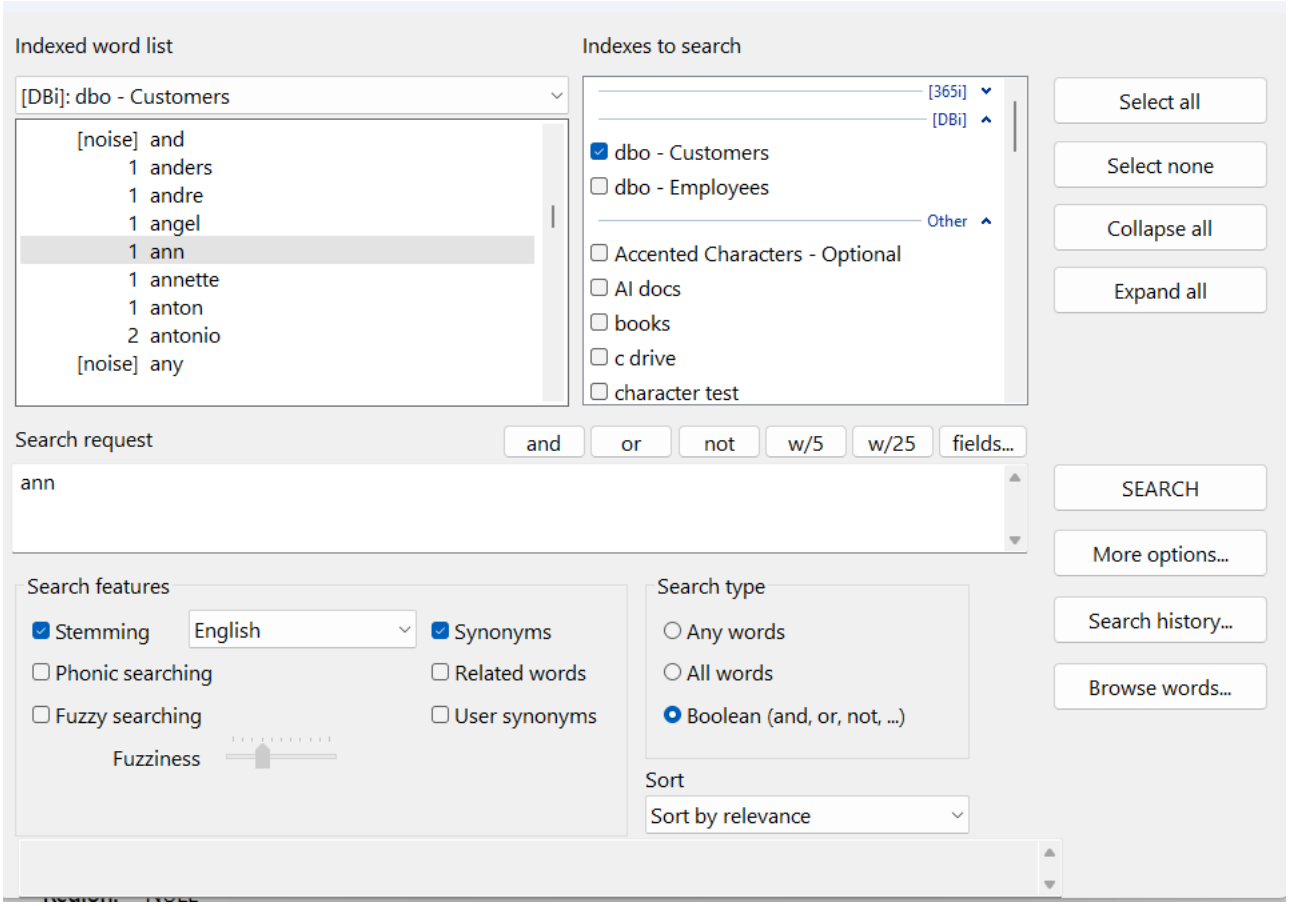
Index Groups

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 Database Indexer are prefixed [DBi]:



If the database index appears in the 'Other' group, see Troubleshooting page.

Set up Firewall

To connect Database Indexer to an Azure SQL Database, a firewall policy must be created to allow Database Indexer to connect to the database.

It is recommended to use a trusted server with a static IP address to index an Azure SQL Database for the purpose of security and ease of firewall management.

Another more advanced option is to use a Virtual Network Firewall rule

Option 1. Creating an IP Firewall Rule

1. Go to the Azure SQL Server Firewall Rules Page
    a. Log into the Microsoft Azure Portal from the server/computer running Database Indexer.
    b. From *All Resources* select your *SQL Server*
    c. Under *Security* select *Firewalls and virtual networks*

2. Creating a new Firewall Rule
    a. Copy the displayed Client IP Address of the computer.
    b. Paste it into the 'Start IP' and 'End IP'
    c. Add a name for the rule.

3. Click *Save* to save the Firewall Rule.

Refer to:

Create a virtual network using the Azure portal

Create a Site-to-Site connection in the Azure portal

Ensure your SQL Server has had the new Virtual Network added to its firewall rules.

Connect Database Indexer

1. Open Database Indexer and select *Add Database*.

2. Use the MSSQL Database type and fill in the fields using the SQL Database Information provided to you by Azure.

3. Click *Save*

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Connecting to Amazon Aurora and RDS

Database Indexer can index databases hosted on Amazon Web Services. Use the **MySQL** database type for Amazon Aurora (MySQL-compatible) and Amazon RDS for MySQL, and the **MS SQL** database type for Amazon RDS for SQL Server. Database Indexer only reads data, so give it a database user with read-only permission.

Before you start

- **Endpoint:** in the AWS Management Console open **RDS > Databases**, select your database or cluster and, on the **Connectivity & security** tab, copy the endpoint, for example `mycluster.cluster-abc123xyz.eu-west-2.rds.amazonaws.com`. For an Aurora cluster that has a reader instance, the reader endpoint (it contains `cluster-ro-`) keeps the indexing load off the instance your application uses.
- **Port:** 3306 for Aurora MySQL and RDS for MySQL; 1433 for RDS for SQL Server unless you chose a different port.
- **A read-only database user** (see below).
- **A way to reach the database.** Choose Option 1 if the database is publicly accessible, or Option 2 if it is private and only reachable from inside your AWS network.

Create a read-only database user

Connect to the database with your usual MySQL client as an administrator and create a user that can only read the database you want to index. Replace the user name, password and database name with your own:

```
CREATE USER 'dbindexer'@'%' IDENTIFIED BY 'choose-a-strong-password';
GRANT SELECT ON mydatabase.* TO 'dbindexer'@'%';
```

If Database Indexer always connects from the same address, use that IP address instead of `%` so that the user cannot be used from anywhere else. Do not use the master (administrator) user for indexing.

Option 1. Connect directly (Standard TCP/IP)

Use this option when the database is **Publicly accessible**. In the RDS console, on the **Connectivity & security** tab, check that Publicly accessible is **Yes**; if it is No, use Option 2.

1. **Allow the Database Indexer computer through the AWS security group.** On the **Connectivity & security** tab click the VPC security group, choose **Inbound rules > Edit inbound rules > Add rule**. Set Type to **MYSQL/Aurora** (port 3306) or **MSSQL** (port 1433) and Source to **My IP**, or to the static IP address of the computer running Database Indexer. Click **Save rules**. Do not use 0.0.0.0/0 (the whole internet).
2. Open Database Indexer and select **Add Database**.
3. Select the **MySQL** database type and set Connection Method to **Standard (TCP/IP)**.
4. Enter the endpoint as the **MySQL Hostname**, **3306** as the **MySQL Server Port**, and the read-only user name and password.
5. Select the **SSL** tab and set up the connection as described in SSL for Aurora and RDS below.

6. Click **Save**.

If your IP address changes (for example on a home or office broadband connection), the connection will start to time out; update the security group rule with the new address.

SSL for Aurora and RDS

Aurora and RDS present certificates issued by Amazon. As described in MySQL SSL Options, Database Indexer needs a copy of the certificate authority (CA) file in .pem format on the computer where it runs. Amazon does not use client certificates, so you only need the CA file.

1. Download the Amazon RDS certificate bundle: either the global bundle or the bundle for your AWS Region, for example eu-west-2. Other regions are listed in the Amazon RDS documentation. Save the file on the computer running Database Indexer.
2. On the SSL tab check **Require SSL**.
3. Set Validation Method to **Certificate File** and **Browse...** to the .pem file you downloaded.
4. Optionally check **Validate hostname**, which protects against impersonation. Leave the client-cert and client-key file boxes empty (from this version they are optional). Validate hostname only works when the MySQL Hostname is the endpoint name that AWS provides; it will fail if you connect through your own alias (CNAME) for the database.

Option 2. Private database through an SSH server

Use this option when the database is not publicly accessible. Database Indexer connects first to an EC2 instance in the same AWS network (sometimes called a bastion or jump host) using SSH, and the database connection is carried through that encrypted tunnel.

1. Check that the EC2 instance's security group allows SSH (port 22) from the Database Indexer computer, and that the database's security group allows port 3306 from the EC2 instance's security group.
2. In Database Indexer select **Add Database**, choose the **MySQL** database type and set Connection Method to **Standard TCP/IP Over SSH**.
3. Enter the **SSH Hostname** (the public DNS name or IP address of the EC2 instance) and the **SSH Username** (for example `ec2-user` on Amazon Linux or `ubuntu` on Ubuntu).
4. Click **Browse...** next to **SSH Key File** and select the private key file you downloaded when you created the EC2 key pair. If your SSH server uses a password instead, enter it in **SSH Password**.
5. Enter the database endpoint as the **MySQL Hostname**, exactly as it appears in the RDS console (do not use localhost: the name is looked up from the EC2 instance), **3306** as the **MySQL Server Port**, and the read-only user name and password.
6. Click **Save**.

The SSH connection encrypts the traffic, so the SSL tab is not used with this connection method.

Aurora Serverless databases that pause

An Aurora Serverless v2 cluster can be set to scale down to zero capacity when it is idle. The first connection after a pause can take 15 seconds or more while the database wakes up. Database Indexer waits up to 30 seconds for a connection; if the first attempt times out, run the index again after a minute. For scheduled indexing, choose a scheduled time when the first run can be repeated or check the Windows Event Viewer for connection errors.

Amazon RDS for SQL Server

Select the **MS SQL** database type and enter the RDS endpoint as the server name, for example `mydb.abc123xyz.eu-west-2.rds.amazonaws.com`. If your instance does not use port 1433, add the port after the name separated by a comma, for example `mydb.abc123xyz.eu-west-2.rds.amazonaws.com,1435`. Choose **SQL Server Authentication** and enter a read-only login (RDS only supports Windows Authentication when it has been joined to an AWS Directory Service domain). Allow the Database Indexer computer in the security group as in Option 1, using port 1433.

RDS for SQL Server supports encrypted connections. Check **Encrypt Connection**. The certificate is issued by Amazon, which Windows does not trust by default, so either check **Trust Server Certificate** (the connection is encrypted but the server is not verified), or import the Amazon RDS certificate bundle into the Windows Trusted Root Certification Authorities store and leave Trust Server Certificate unchecked. See MS SQL SSL Options.

If the connection fails

- **Timeout:** the security group does not allow the computer's current IP address, the database is not publicly accessible (use Option 2), or an Aurora Serverless database is waking up.
- **Access denied:** the database user does not exist for the address you are connecting from. A user created as `'dbindexer'@'10.0.0.5'` cannot connect from a different address.
- **SSL error:** the .pem file is missing or is not the Amazon bundle for the database, or Validate hostname is checked and the MySQL Hostname is not the AWS endpoint name.
- **SSH error:** check the user name for the type of EC2 instance, that the key file is the one created with that instance, and that port 22 is open to your IP address.

If you still cannot connect, contact support@dtsearch.co.uk.

Troubleshooting

Symptom:

[DBi] Index Group missing in dtSearch Desktop search window.

Cause:
The index is listed in both the database indexer library file and the default dtSearch index library file and dtSearch Desktop shows the default copy instead of the group.

Fix: In dtSearch Desktop click on **Index > Index Manage**r, click **Index Library Manager…** button, In the **Index Libraries** list select the …\dtsearch\ixlib.lib file. Select the missing index from the **Indexes in Library** list, click the **Remove** button (NOT Delete) to remove it from the list. Restart dtSearch Desktop. (May occur in versions before October 2026.)

Get Help

If you need assistance with evaluating or setting up your own databases, please contact support@dtsearch.co.uk.

Settings

If document extraction is configured, the document will be cached in the index.

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

Feedback

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

Appendix

Changes since 22 April 2022

- Translation – new user Language selection
- New Troubleshooting page
- New Index Groups page
- New Connecting to Azure SQL Database section
- New Connecting to Amazon Aurora and RDS section