

365 Indexer

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Installation

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

365 Indexer is an add-on product for use with dtSearch Desktop/Network. Before installing 365 Indexer you must install a copy of dtSearch Desktop/Network on the machine where you will create and maintain the indexes. dtSearch Network [licenses](#) include use on a single additional machine for indexing and/or for shared network index access.

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

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

Translation

The default language of the user interface is English. If you want to translate the user interface make a copy of the `365 Indexer - template.lang` file which is in the `\\I18N` subfolder, translate it using Notepad, save it in utf-8 format and place it in the same folder as `365Indexer.exe`. If a template file is found when 365 Indexer is run, it will read the file to translate the user interface.

Introduction

365 Indexer can be used to index SharePoint Sites and OneNote Notebooks belonging to an organizations Microsoft Office 365 account. Multiple accounts can be added to the indexer.

To index any data using 365 Indexer:

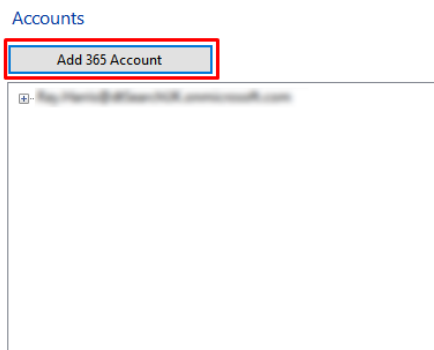
1. Add a 365 Account
2. Setup an Indexing Task
3. Run or schedule the task.

Indexes created by 365 Indexer are not automatically versioned and are not incrementally updated. Every time the Index Task is run the index will be rebuilt.

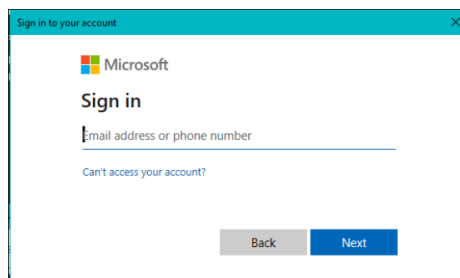
Add an account to 365 Indexer

To read SharePoint Sites and OneNote Notebooks in an Office365 account, add an Office 365 account to 365 Indexer.

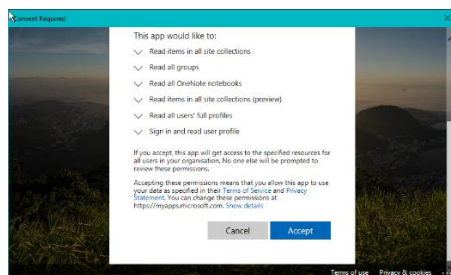
1. Open 365 Indexer and click *Add 365 Account*



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



3. 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.



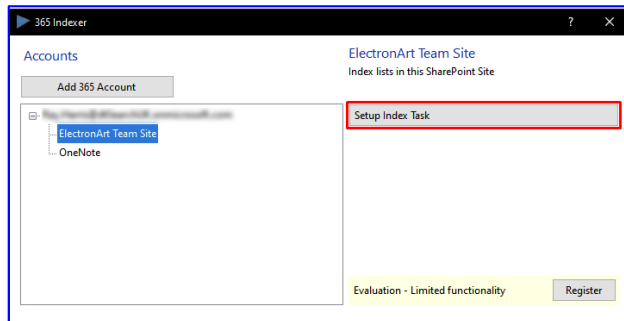
Although 365 Indexer requires permission to read all the items listed, it provides granular control over what SharePoint or OneNote files to index.

Security note: Indexes are created using the cache documents in the index option. Please see [FAQ DTS0226](#).

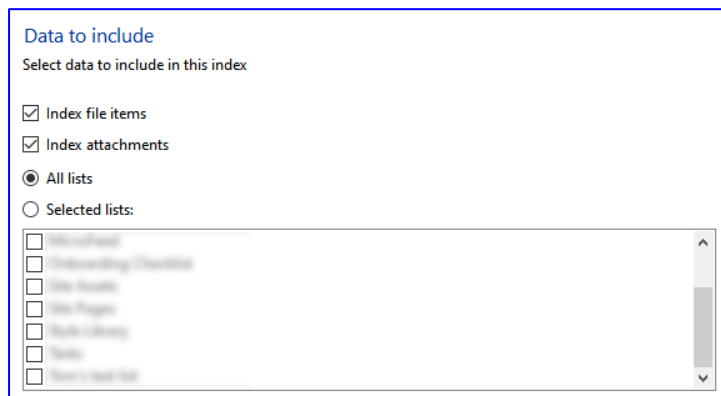
Setup SharePoint Site Indexing Task

1. Select the Site from the account.

2. Select *Setup Index Task*



3. Choose lists and data to Index.



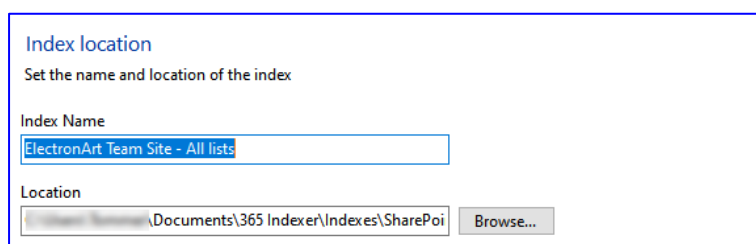
A. Choose *Index File Items* to index files in lists of files in the SharePoint Site.

B. Choose *Attachments* to index files that are attached to List Items.

C. Choose 'All Lists' to Index all detected lists in the Site, or 'Selected lists' to Index only checked lists.

Press **Next** to proceed.

4. Confirm or change the Index Location and name.



By default, indexes are stored in `Documents\365 Indexer\Indexes\SharePoint`

Press **Next** to proceed.

5. Confirm the use of **Default Indexing Options** or set **Custom Indexing Options**.

Indexing Options
Set indexing options or use defaults

Default indexing options
 Custom indexing options...

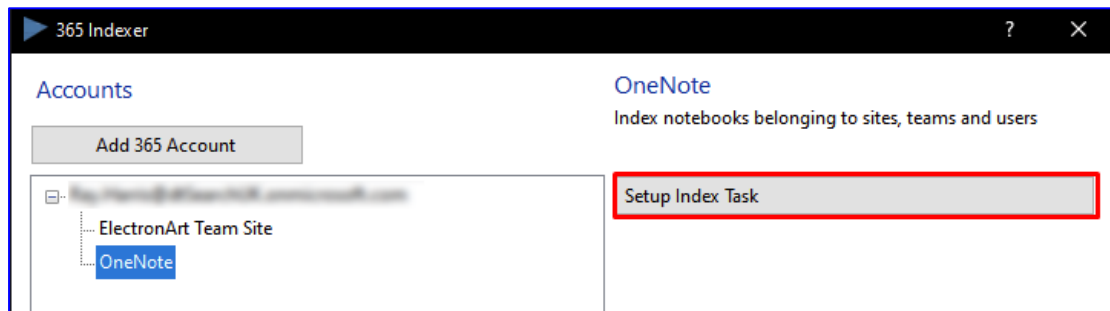
Automatically recognize dates, email addresses	True
Index numbers	True
Index document properties such as Author, Subject	True
Index filenames as text	True

Click **Finish**.

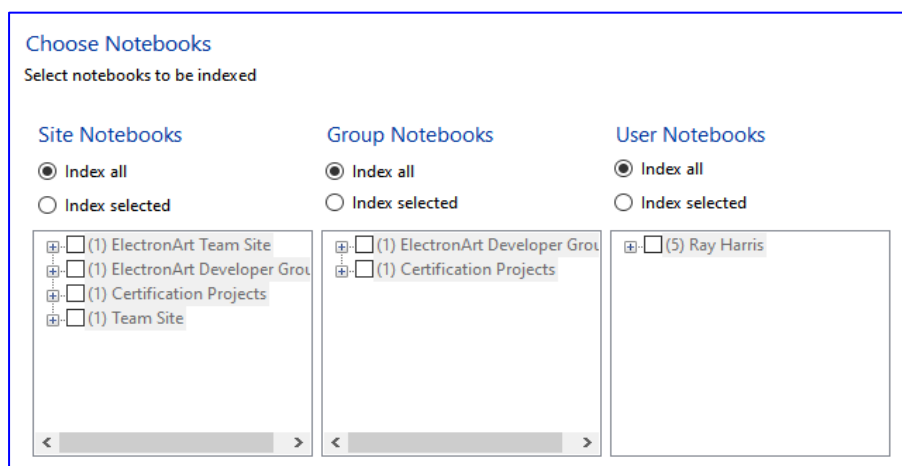
Setup OneNote Indexing Task

1. Select OneNote from the account.

2. Click *Setup Index Task*



3. Choose notebooks to be indexed.



For Site Notebooks, Group Notebooks and User Notebooks:

- A. Check 'Index All' to index all Existing and New Notebooks when the task is run.
- B. Check 'Index Selected' to Index Only Selected Notebooks.
- C. When using 'Index Selected':
 - i. Check the *Site/Group/User Node* to index all notebooks belonging to the Site/Group/User. New notebooks will be automatically discovered and indexed when the task is run.
 - ii. Expand the root node and select individual notebooks to index only specific notebooks. Ensure the root node is *unchecked* to prevent new notebooks being discovered and indexed.

Click **Next** to Proceed.

3. Confirm or edit the index name and location.

Choose Index Location

Set the path where the created index will be stored.

Index Name

All Notebooks

Location

\\localhost\365 Indexer\Indexes\OneNote

Browse...

Click **Next** to Proceed.

Confirm the use of **Default Indexing Options** or set **Custom Indexing Options**.

Indexing Options

Set indexing options or use defaults

Default indexing options

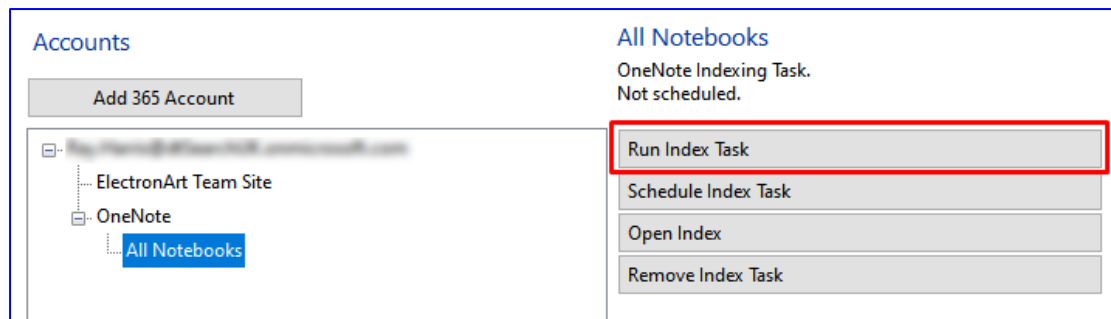
Custom indexing options...

Automatically recognize dates, email addresses	True
Index numbers	True
Index document properties such as Author, Subject	True
Index filenames as text	True

Click **Finish** to exit.

Run an Index Task

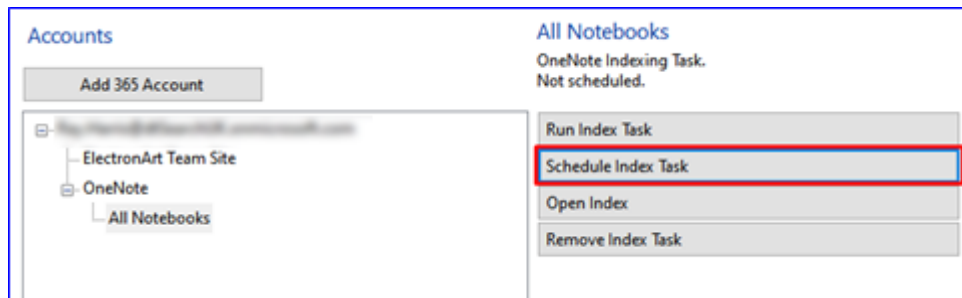
1. In 365 Indexer, expand the account and OneNote or Site Node containing the Index Task.
2. Click *Run Index Task*



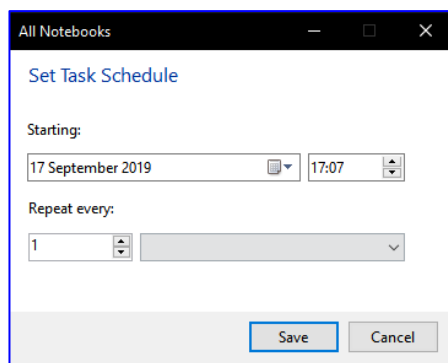
The indexer will now run.

Schedule an Index Task

1. In 365 Indexer, expand the account and OneNote or Site Node containing the Index Task.
2. Click *Schedule Index Task*



3. Set the Task Schedule and click *Save*



Open an Index

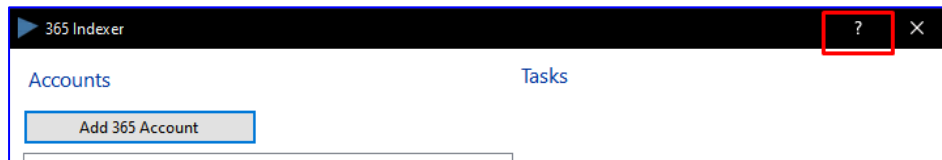
If an Index Task has already been run at least once, click *Open Index* to open the Index directly in dtSearch Desktop/Network.

Remove Index Task

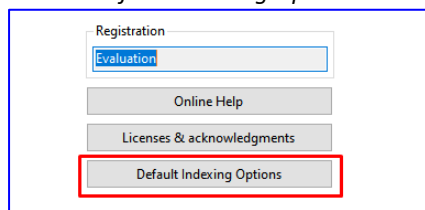
Click *Remove Index Task* to remove the selected task. Any existing indexed data will not be deleted.

Set Default Indexing Options

1. Click the '?' Icon to open the About Dialog



2. Click *Default Indexing Options*



3. Edit the options, then click *Apply*

