dtSearch®

Quick Start Guide

Orders and
Technical Support

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dtSearch Quick Start

dtSearch can search megabytes of text in a second. It does this by building an index that stores the location of words in your files. An index does not store the text of documents, so to view retrieved documents you will still need to keep the documents accessible.

Indexing Documents

1. Choose **Create Index (Basic)** from the Index menu.

2. Enter a name for the index and click OK.

3. dtSearch will ask if you want to add documents to the index. Click **Yes** and the Update Index dialog box will appear.

4. In the Update Index dialog box, click **Select** to select the directories you want to index. When you finish selecting directories, click OK.

5. Click OK to begin adding documents to your index.

Note 1: **Disk Space**. To build the index, dtSearch needs free space on the drive containing the index at least equal to the size of the documents to be indexed. (This is because dtSearch creates temporary files during indexing.) Once complete, an index is usually about a fourth the size of the original documents, though this can vary depending on the number and type of documents. In general, the more documents in an index, the smaller the index will be as a percentage of the documents.

Note 2: **File Formats.** dtSearch automatically recognizes major word processor files, DBF files, ANSI files, and ZIP files. For a complete list of the file formats that dtSearch supports, see "Supported File Types" in the manual or on-line help.

Note 3: **EXE and other Program Files.** By default, dtSearch will index and search everything in a selected directory. To avoid indexing files that are not documents, use filename filters in the Update Index dialog box.

Searching using an Index

1. Click **Search** on the button bar (or choose **Index Search** from the Search menu). The Index Search dialog box will appear. At the top of the dialog box is a box that can display any of the following search tools:

   Word List   A scrolling list of the words in the index you have selected. Next to each word is a number, which is the number of times the word occurs in the index. As you type in a search request, the list will scroll to the word you are typing.

   If you have selected more than one index to be searched, the highlighted index will be the

one listed. To change the index displayed in the Word List, click on the index you want to see in the Indexes to Search box.

Hints   The basics of creating search requests.

History   A list of your most recent search requests. Next to each request is a pair of numbers, like "35/283," which tells you the number of files and hits that the request found.

Macros   A list of the macros you have created.

To select one of the tools, use the buttons at the top of the search dialog box. To insert a word, previous search request or macro into a search request, click on the item to highlight it and click the **Insert** button.

2. Click the **Select** button to select indexes to search.

3. Enter a search request in the space provided. There are two basic types of search requests:

A <u>natural language</u> search request consists of an unstructured natural language or "plain English" query. In a natural language search request, words such as AND and OR are disregarded. A natural language search can rank retrieved files from most to least relevant according to the density and rarity of matching words in your documents.

A <u>structured</u> search request consists of a group of words, phrases or macros linked by search connectors such as AND and OR to precisely indicate the relationship between them.

To enter a <u>natural language</u> search request, click **Natural language** under **Search features** and type in a plain English search request: *Get me Sam's memo on the 1994 takeover of CorpX.*

To enter a <u>structured</u> search request, enter words or phrases linked by connectors.

AND	both words must be present
OR	at least one of the words must be present
NOT	the next word must not be present
W/5	the words must occur not more than 5 words apart
	(you can also use W/10, W/20, etc.)
*	matches any number of letters
?	matches any single letter

Examples:
```
apple and pear
*apple w/6 pear
apple sauce w/27 grape ju?ce
apple and (pear w/5 bana*a)
apple and not pear
```

not pear

To have dtSearch enter the connectors for you, click the **Compose Request** button to access the Compose Search Request dialog box. In the Compose Search Request dialog box, you can enter the words or phrases you want to search for and click on connector buttons to describe how the words are related.

4. Select **Search Features** to use in the search.

    Stemming searches other grammatical forms of the words in your search request. For example, with stemming enabled a search for *apply* would also find *applies*.

    Phonic searching finds words that sound similar to words in your request, like *Smith* and *Smythe*.

    Fuzzy searching sifts through scanning and typographical errors. Fuzziness adjusts from 1 to 10 depending on the degree of misspellings. (Try starting with 3.)

    To see how stemming, phonic searching, fuzzy searching or wildcards will affect your search, click the **Lookup** button.

5. Click OK to start the search.

Viewing Search Results

1. After a search is complete, a dialog box will appear listing options for sorting search results (file name, file date, or number of hits). Pick one of the options, click OK and a Search Results window will appear.

2. To select a document to view from the Search Results window, double-click on it or move the cursor to it and press ENTER. The document will appear in a new window overlaying Search Results.

3. To jump to the next hit in a document window, click **Next Hit** on the button bar or press SPACEBAR.

4. To search for text in a retrieved document, click the **Find Text** button in the button bar, enter the text you want to find, and click OK.

5. To switch between a document window and search results, press TAB. To close a document window, press ESCAPE.

6. For a menu of all options you can use in a document window or Search Results, click the right mouse button anywhere in the window.

7. To open a document in the application that created it, see "Launching Applications" in the manual or on-line help.

8. To view an image associated with a document file, see "Imaging and Scanning" in the manual or on-line help.

Copying Retrieved Text

To copy a block of text from a document to the Windows clipboard or to a file, mark the text (click and drag with the mouse) and click the **Copy** button in the button bar.

To copy an entire file, choose **Copy File** in the Edit menu while you are viewing the file. If a file is stored in a ZIP archive, Copy File will extract it from the archive.

To copy multiple files from Search Results, press SPACEBAR to mark the documents you want to copy (a "*" will appear next to each selected document) and then choose **Copy File**. You can also use SPACEBAR to mark multiple files to print, delete, or include in a Search Report (see below).

Create a Quick Summary of Your Search Results

An easy way to see all hits in all retrieved documents is to build a Search Report. A Search Report shows all hits along with the amount of context that you request. It also contains hypertext links to the hits in your files.

1. Choose **Search Report** from the Search menu. The Generate Search Report dialog box will appear.

2. Enter the number of words of context that you want dtSearch to include in your Search Report and click OK to generate the report.

3. In the Search Report, double-click on the highlighted hypertext links to jump to the location of hits in your documents. Search Reports contain two types of hypertext links: highlighted page and paragraph numbers like `[Page 4 Paragraph 22]` which take you right to the location of a hit, and highlighted document names, which take you to the top of the document.

Scanning

If you have TextBridge® OCR by Xerox,® you can scan documents from within dtSearch.

1. Install TextBridge if it is not already installed and test it by scanning a document using TextBridge directly. Once you have TextBridge set up correctly, dtSearch will automatically recognize your settings when you scan from within dtSearch.

2. In dtSearch, choose **Scan** from the File menu to access the Scan dialog box.

3. Under **Document to create**, enter the name of the file you want to create and select the file type of the document you want to create.

4. Check **Save image of document** if you want to be able to view the document as an image.

5. Click the **Scan** button to start scanning the document.

6. After you have scanned a document, it will appear in the **Scanned Documents** list in the dialog box. To index the documents listed, click the **Index** button.

7. If you checked **Save image of document** when you scanned a document, you can click the **Image** button in the button bar when you are viewing the document to see the scanned image of the document.

Using dtSearch on a Network

Installing dtSearch in a Shared Directory

1. Install dtSearch in a directory that each user will have read-only access to.

2. Make each of the dtSearch program files read-only. (This step prevents sharing violations on some networks.)

3. Set up private directories. Each user will need a private, writeable directory that dtSearch can use for temporary files and to store the user's setup files. This directory cannot be shared.

   The easiest way to set this up is for each user to use a directory on the user's own local hard disk (such as C:\DTSEARCH) as a private dtSearch directory. Have each user run dtSearch using the /DIR command-line switch to designate a private directory, like this:

   ```
   DTSWIN /DIR C:\DTSEARCH
   ```

   Alternatively, if you want private directories to reside on the network rather than on each user's local hard drive, and if your network creates an environment variable containing each user's name (%USER% or %USERNAME%), you can use that environment variable with /DIR. For example, to give each user a private directory on the shared H: drive:

   ```
   DTSWIN /DIR H:\%USER%\DTSEARCH
   ```

   An alternative to the /DIR command-line switch is to designate a private dtSearch directory by setting the %DTSDIR% environment variable in each user's AUTOEXEC.BAT file, like this:

   ```
   SET DTSDIR=C:\DTSEARCH
   ```

Shared Setup Files

dtSearch looks for setup files in each user's private directory first and, if it does not find setup files there, checks the shared dtSearch directory. When dtSearch saves a setup file, it writes the file to the user's private directory. This makes it easy to set up all users with a common initial configuration that they can then customize to suit individual preferences. To set up the initial configuration, do the following:

1. Run dtSearch directly from the shared network directory without the /DIR option, so all setup files will be stored in that directory.

2. Set up the configuration you want.

3. Exit dtSearch.

4. Make the new setup files read-only.

Shared Indexes and Concurrent Indexing and Searching

dtSearch supports multiuser access to indexes stored on networks.

Drive Mapping. To avoid possible drive mapping problems, build an index on the same drive as the documents it indexes. This prevents drive mapping problems since dtSearch, by default, uses relative rather than absolute paths in indexes. (See "Relative Paths" in the manual or on-line help.)

Index Libraries.   A user's index library is a file that lists the indexes a user can search or update. On a network, index libraries can be either shared or private. If all users share a common library, then each user will automatically be able to search indexes that are added to the library. If a user has a private index library, the user can use **Recognize Index** to add shared network indexes to the user's index library.

If a user is using a shared index library that the user has read-only access to and the user creates an index, dtSearch will be unable to add the index to the shared library and will create a private index library for the user.

Read/Write Privileges. Write and read access to shared indexes is controlled completely by the network's access permission settings. If an index is stored on a network drive, any user who has write access to the directory containing the index will be able to update the index in dtSearch. Any user who has read access to the index will be able to search the index or perform other functions (such as Verify Index and Copy Index) that do not require write access.

Concurrent Access. When a user is updating an index, other users will be able to search but not update the index. When a user is compressing an index, other users will be unable to search or update the index.

User Names (Optional)

If a network supports use of an environment variable such as %USER% or %USERNAME% to identify users, then users can enter that environment variable in **User Name** in **Preferences** in the Options menu.

Network Troubleshooting

After a search, dtSearch displays search results correctly but users cannot view retrieved documents.

1. Most commonly, this is caused by drive mapping problems. For example, for the user who indexed the documents, the documents were in C:\DOCS, but for the user doing a search, the documents were in K:\DOCS. These problems are especially common on peer-to-peer networks, because each user sees each drive differently. To avoid drive mapping problems, build indexes on the same drive as the indexed documents.
2. Make sure all users have read access to the directory containing the documents.

An index is built in a shared directory but it does not appear in a user's list of indexes.

Have the user use **Recognize Index** in the Index menu to add the index to the user's index library.

When one user is running dtSearch from a shared directory and another user tries to run dtSearch, the second user gets a "sharing violation" message.

1. Make sure every user is using a separate private directory.
2. On some networks, a file cannot be shared unless it is read-only. Use Explorer (in Windows 95) or Windows' File Manager (in Windows 3.x and Windows NT) to make every file in the shared dtSearch directory read-only.