d.velop enterprise search for Elasticsearch: Administrator

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1. d.velop enterprise search for Elasticsearch

1.1. Basic information about the application

This section contains general product information.

1.1.1. About d.velop enterprise search for Elasticsearch

An ECM system enables structured data storage. As a rule, information objects are not only present in structured in your ECM system, but are also created in other systems and platforms. For example, the correspondence in your Exchange server also contains a lot of information in e-mails that could be relevant for a business transaction. With enterprise search, you can overcome data silos and find information not just in your ECM system, but in your heterogeneous business landscape using providers.

The d.velop enterprise search for Elasticsearch search provider enables you to search in searchable file directories using Elasticsearch.

1.1.2. What components does the app contain?

d.velop enterprise search for elastic search contains the following components:

- **d.velop enterprise search for Elasticsearch**This component is started in d.3 process manager. The component is responsible for displaying and storing the configuration. In addition, the component handles the communication with the ElasticSearch database.
- **ElasticSearch database**This component is registered as a Windows service with the name *elasticsearch-service-x64*. The component provides the search database and functionalities.
- **d.velop enterprise search file crawler**This component is started in d.3 process manager and represents the connection between the file directory and the component *d.velop enterprise search for elasticsearch*. As the only component, d.velop enterprise search file crawler accesses the configured file directory.

1.2. Installing and Uninstalling

This chapter provides information on the installation of d.velop enterprise search for Elasticsearch.

1.2.1. System requirements

Pay attention to the general system requirements for d.velop products.

1.2.2. Installing d.velop enterprise search for Elasticsearch

You install the software exclusively using d.velop software manager. If an application is required for different products, the corresponding software packages are also installed automatically.

For further information on installing the software, see the d.velop software manager manual.

After the installation, call the **Search provider** dialog in the configuration to refresh the list of available search providers. Call this dialog box again every time the configuration is changed in the search provider to update the configuration.

1.2.3. Uninstalling d.velop enterprise search for Elasticsearch

The software you installed using d.velop software manager can only be uninstalled with d.velop software manager. If the software to be uninstalled has dependencies with other software packages, you must resolve these conflicts accordingly.

For further information on uninstallation, see the d.velop software manager manual.

1.2.4. Installing updates for d.velop enterprise search for Elasticsearch

You can only update the software using d.velop software manager.

For further information on updates, see the d.velop software manager manual.

1.3. Configuring d.velop enterprise search for Elasticsearch

In this chapter, you'll find more information about the settings and configuration options.

1.3.1. Adding a Searchable File Directory

This section describes how to create a searchable file directory.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Click the plus character to add a file directory.
5. Choose **File directories**.
6. Enter a descriptive name in the **Title** box.
7. Specify the URL for an icon with which this connection should appear. Use the file extension **.png** or **.jpg. You can also retain the default URL.**
8. Enter the desired file directory in the format **C:\<path>** for a local directory or in the format **\\<UNC path>** for a network directory.
9. If the directory is protected, enter the user name and password of a user with access to the directory, including the domain.
10. If you want the search to take into account user permissions for each end user, enable **Consider user authorization**.
11. Click **Test connection** and check that all the details are accepted. If a check mark appears, you have access to the directory.

You have now successfully created a searchable file directory. Enable the search provider in search provider management so your users can use the search provider.

Then configure the crawler for the file directory so that the data it contains is also included in the index.

This section describes how to configure exclusions for the crawl to ignore folders, files or web pages.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Click the pen icon for an existing configuration or create a new configuration by clicking the plus sign.
5. Go to **Exclusion list**.
6. Click **Add**.
7. Enter an exclusion in the form of a wildcard notation.
8. Choose whether you want the results in question to be ignored or just want the properties to be indexed.
9. Confirm the modification with **Save**.

> **Note**
>
> By default, an exclusion is added that ignores Office files that are currently open and/or being edited.

1.3.2. Adding a searchable website

This section describes how to create a searchable file directory.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connection data**.
4. Click the plus sign to add a website.
5. Click **Websites**.
6. Enter a descriptive name in the **Title** box.
7. Specify the URL for an icon with which this connection should appear. Use the file extension **.png** or **.jpg. You can also retain the default URL.**
8. Enter the website, in the format **https://mywebsite.com**
9. If the specified website cannot be embedded in an iFrame, activate **Open search results in a new window**.
10. Define the subpage up to which you want to search the website.
11. Enter the delay time between the website calls.
12. If the website is protected with authentication, enter a name and password with access. This user information is used to perform basic authentication.
13. Click **Test connection** and check that all the details are accepted. If a check mark appears, you have access to the website.

You have now successfully created a searchable website. Enable the search provider in search provider management so your users can use the search provider.

Then configure the crawler for the website to ensure that the contained data is also included in the index.

This section describes how to configure exclusions for the crawl to ignore folders, files or web pages.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Click the pen icon for an existing configuration or create a new configuration by clicking the plus sign.
5. Go to **Exclusion list**.
6. Click **Add**.
7. Enter an exclusion in the form of a wildcard notation.
8. Choose whether you want the results in question to be ignored or just want the properties to be indexed.
9. Confirm the modification with **Save**.

1.3.3. Searching a File Directory (Crawling)

This section describes how to configure a searchable file directory so that the directory is included in the index (crawling).

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Select a file directory and click the play icon to start the crawl. If you want to run a one-time crawl, you should select the **Full** option the first time you activate the crawl.
5. Start the crawling of the file directory with **Start**.

You will now receive a list of the files found in the directory. You can open and view the list at any time by clicking the line for the file directory.

You have successfully performed an initial crawl on the file directory. A check mark or the status **Done** appears if the crawl has been completed successfully.

If you have already run a full crawl, you can also start an incremental crawl when you run a one-time crawl. In an incremental crawl, all files that have been adapted or changed since the last start time are loaded into the search index again.

If you set up regular crawls, these are always run as incremental crawls. You have three options for such crawls:

Type	Explanation
Time based	Executes the crawler every twelve hours for an incremental crawl.
Event based	Indexes all new and changed documents based on events.
Time and event based	Executes the crawler every twelve hours for an incremental crawl and indexes all documents based on events.

1.3.4. Searching a website (crawling)

This section describes how to configure a searchable file directory so that the directory is included in the index (crawling).

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Select a file directory and click the play icon to start the crawl. If you want to run a one-time crawl, you should select the **Full** option the first time you activate the crawl.
5. Choose **Start** to start the website crawl.

You are now shown an overview of the started crawl. You can open and view the overview at any time by clicking the line for the website.

You have now successfully performed an initial crawl on the website. A check mark or the status **Done** appears if the crawl has been completed successfully.

If you set up regular crawls, the process is always run in full because a change date cannot be determined for websites.

1.3.5. Modifying a Searchable File Directory

This section describes how to modify a searchable file directory.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Select a file directory and click the pen icon.
5. Modify the configuration.
6. Confirm the modification with **Save**.

You have now modified the searchable file directory.

This section describes how to configure exclusions for the crawl to ignore folders, files or web pages.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Click the pen icon for an existing configuration or create a new configuration by clicking the plus sign.
5. Go to **Exclusion list**.
6. Click **Add**.
7. Enter an exclusion in the form of a wildcard notation.
8. Choose whether you want the results in question to be ignored or just want the properties to be indexed.
9. Confirm the modification with **Save**.

1.3.6. Modifying a searchable website

This section describes how to modify a searchable website.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Select the website and click the pen icon.
5. Modify the configuration.
6. Confirm the modification with **Save**.

You have now successfully modified a searchable website.

This section describes how to configure exclusions for the crawl to ignore folders, files or web pages.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Click the pen icon for an existing configuration or create a new configuration by clicking the plus sign.
5. Go to **Exclusion list**.
6. Click **Add**.
7. Enter an exclusion in the form of a wildcard notation.

8. Choose whether you want the results in question to be ignored or just want the properties to be indexed.
9. Confirm the modification with **Save**.

1.3.7. Deleting a Searchable File Directory

This section describes how to delete/remove a searchable file directory from the search.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connection data**.
4. Select a searchable file directory and click the trash can icon**.**
5. Confirm the deletion prompt.

You have now deleted the searchable file directory.

1.3.8. Deleting a searchable website

This section describes how to delete and remove a searchable website from the search.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connection data**.
4. Select a searchable website and click the trash can icon.
5. Confirm the deletion prompt.

You have now successfully deleted a searchable website.

1.4. Tips and Tricks

This topic informs you about additional options that the application offers to help you reach your goal faster.

1.4.1. Viewing the Current Crawl Status

You can view the current crawl status when setting up a searchable file directory.

This is how it works

1. Click **Configuration** on the start page.
2. Under **Enterprise search**, choose the entry **Search provider**.
3. Click the cog icon in the group **File directories, shares and websites (ElasticSearch)** and select the entry **Connections**.
4. Select a file directory using the down arrow icon. A detailled view opens.

You can now view the status of an active crawl.

You will see the following information.

General information

Connection data	Configured connection data
Total number of indexed files	The number of files that have been indexed

Crawl process information

Amount of processed files	The number of files that have been processed so far
Current processing rate	The number of files processed per minute
Current path	Path to the document currently being analyzed

During crawling, OCR and ACL recognition is performed on the documents found.

1.5. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at https://dvelopacademy.keelearning.de/.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: https://kb.d-velop.de/

Find the central imprint at https://www.d-velop.com/imprint.