

## ***EZ Notes Search Installation Guide***

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## ***EZ Notes Search Installation Guide***

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### **Overview**

- Designed for use with Microsoft® Windows® 7 or Windows XP (with Windows Desktop Search Search 4.0).
- Allows users to search their Lotus Notes mail, archives, and attachments using Windows® Search on Windows® 7 or XP with Windows® Search 4.0.
- Search your mail, archives and attachments within Lotus Notes® plus the content on your computer at the same time.
- You can also search your IBM Lotus Notes applications (such as discussion and team room databases) using the Mail, Archives and Applications edition of the product.
- Allows the user to open attachments without opening the Note first.
- Previews Lotus Notes content using the Microsoft® Search preview pane.
- Keeps your index up-to-date without interrupting your normal activities by indexing when CPU resources are free.

The EZ Notes Search connector for Windows® Search works in conjunction with the Windows® Search facility (included with Windows® 7 and added to Windows XP with the installation of Windows Search 4.0) to index your IBM Lotus Notes content, so it can be searched at the same time as all the other content on your computer's hard drive. Messages and their attachments are indexed separately and returned as separate search results.

The connector will automatically index any local mail files or mail archives found in your Lotus Notes data directory or any subdirectory.

With version 2.0, the product includes a new facility for selecting databases to search. These databases can be anywhere on your hard drive. For the Mail and Archives edition, the selected database must be a mail database. For the Mail, Archives and Applications database, the selected database can be any type of database that a user can

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normally open.

Another new feature of V2.0 is that the Notes password prompt is now a Windows graphical user interface. In addition, the user now has the option to store the password encrypted so they are not reprompted.

## **Prerequisites**

This software is supported on Windows® XP with Windows® Search 4.0 and any version of Microsoft Windows® 7, 32 or 64 bit. The user installing the software must be an administrator on the machine. Any version of Lotus Notes 6.x to 8.5.2 will work with this software. In order to search and preview Microsoft Office attachments, you must have Microsoft office installed or the Microsoft Office iFilters. See the Microsoft web site and look for the topic: "2007 Office System Converter: Microsoft Filter Pack".

## **Uninstalling EZ Notes Windows® Search Connector**

In order to uninstall the connector:

1. Exit Lotus Notes
2. Stop the Windows Search Service (see Restarting or Stopping the Windows Search service below). Note: This may automatically restart and you may need to stop it again during the uninstall (3.)
3. If you are uninstalling a V1.X version of the product use the Task Manager to end the EZNMON.exe process if it is running. EZNMON.exe will request a login but just leave the prompt open until you have started to uninstall the program (2.), then click the ESC button.
4. If you are uninstalling a V1.5 Beta or V2.0 version of the product select the "Show Hidden Icons" button in the lower right hand corner. Select the EZNConnector.exe. You must then select File and then Exit menu item. If you use the Close X icon, the application will be hidden again.
5. Use the Control Panel Add/Remove programs to remove the EZ Notes Windows Search Connector

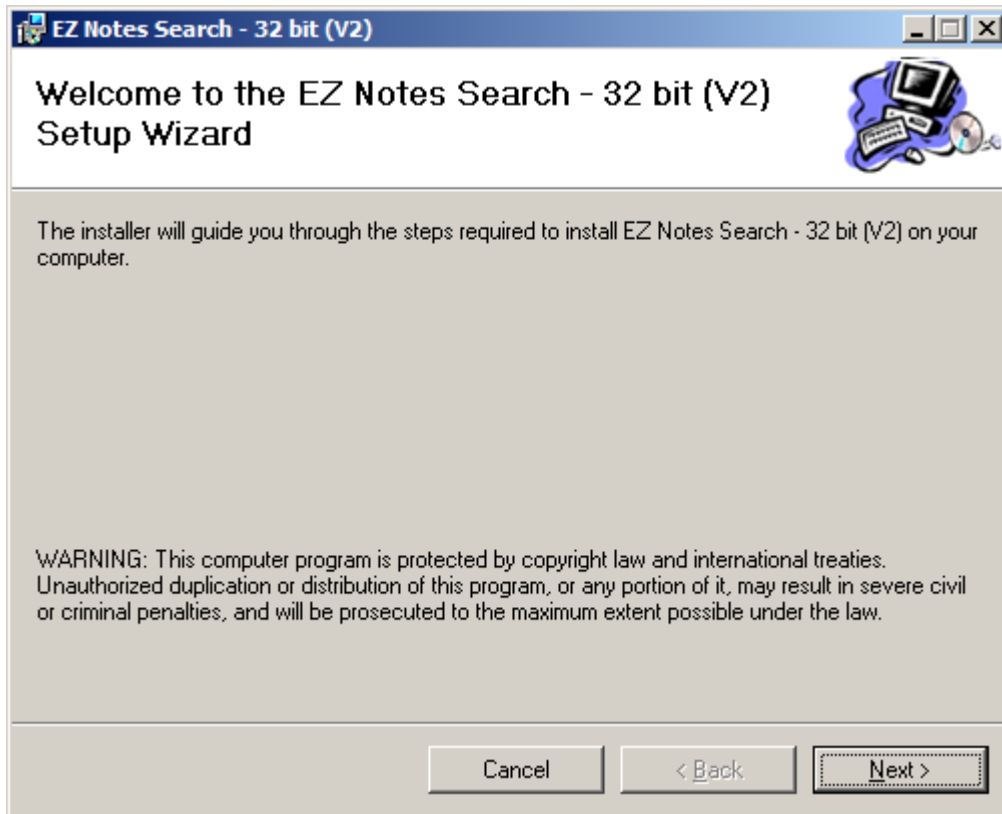
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6. Restart the computer

## **Installation Steps**

### ***Step 1***

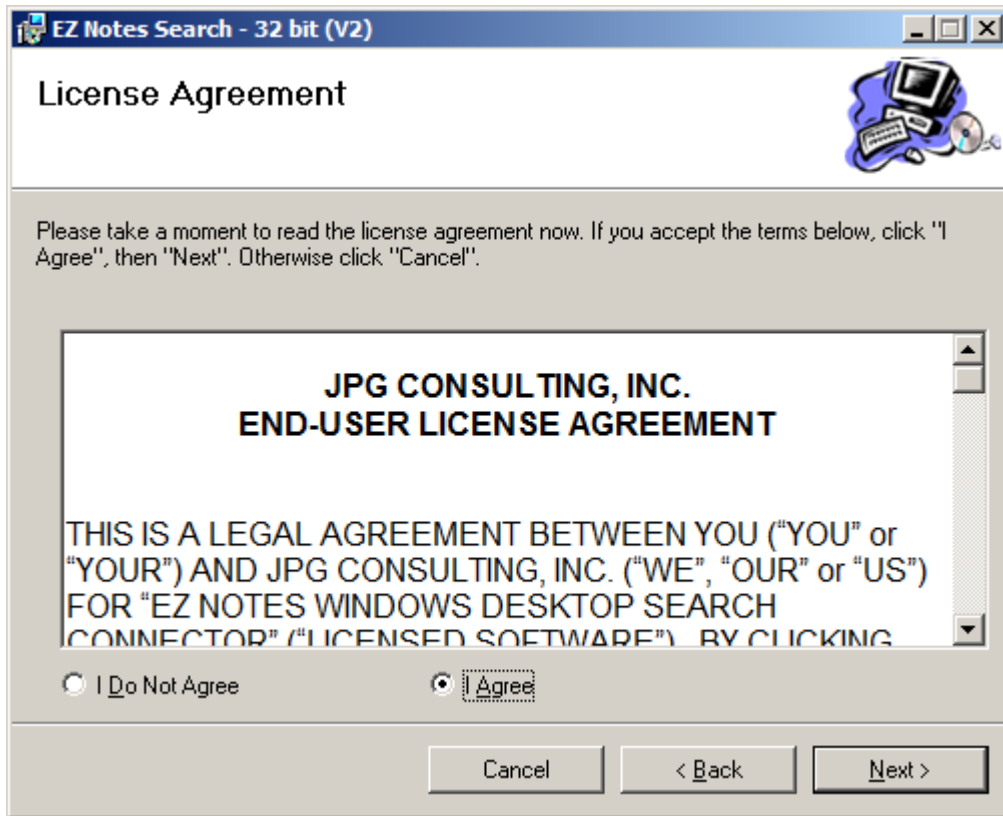
If Lotus Notes is running, exit Lotus Notes. The Zip file you have downloaded contains the Setup.exe, instructions, and the EZ Notes Windows Search Installer Package. Unzip the contents of the file to your hard-drive and double-click on the setup.exe file. You will see this following screen.



Select Next.

### ***Step 2***

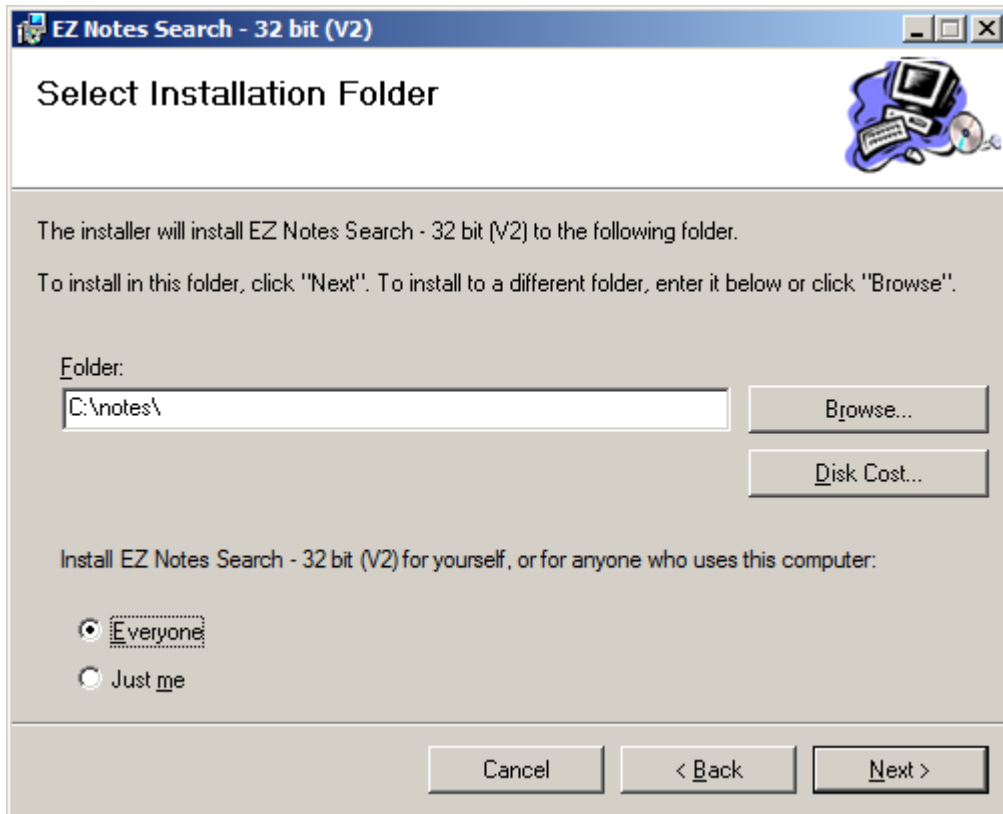
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If you agree to the terms and conditions, select I Agree and then select Next.

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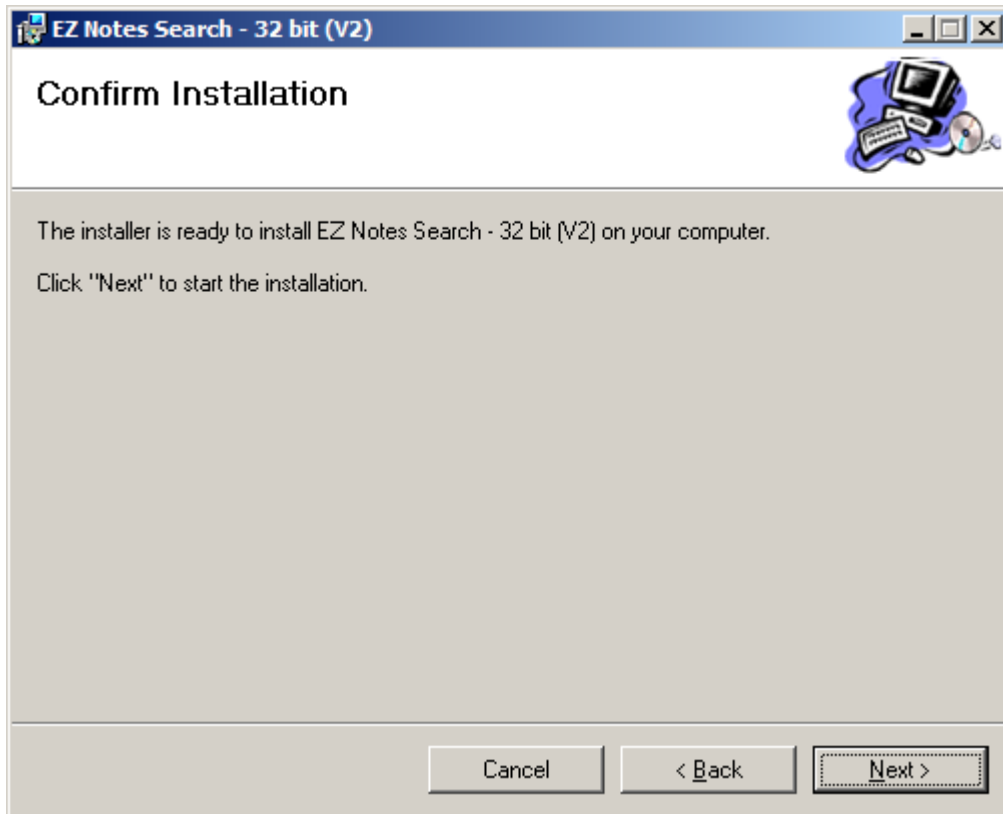
### **Step 3**



The software must be installed into the Lotus Notes directory. That directory should be preselected. It is the same directory that you will find the nnotes.dll. Select Next.

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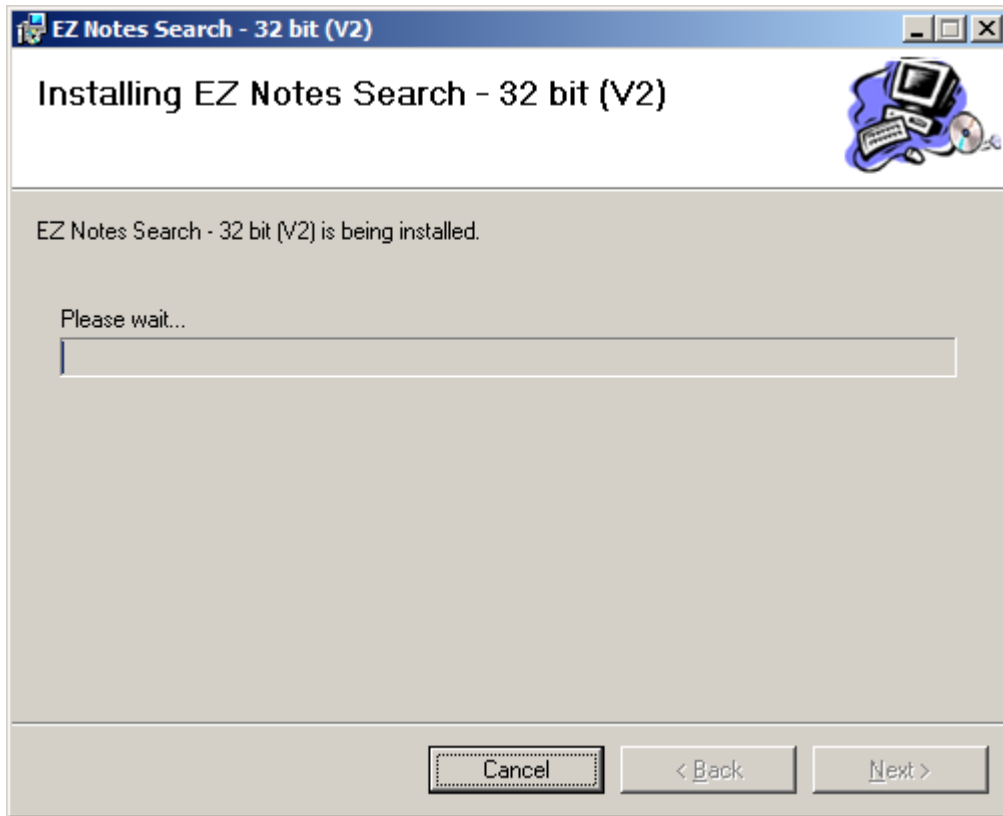
### **Step 4**



Select Next.



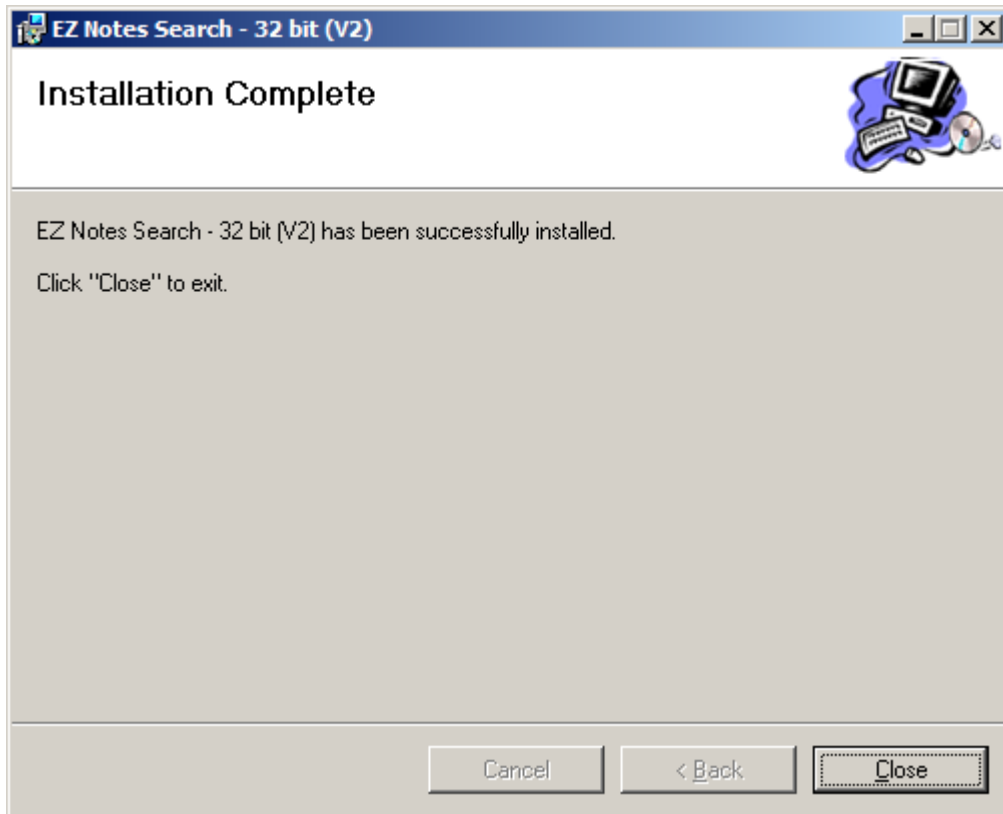
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You may be prompted to allow the setup to use elevated rights. Select Yes to allow the setup to continue.

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### **Step 5**



### **Step 6**

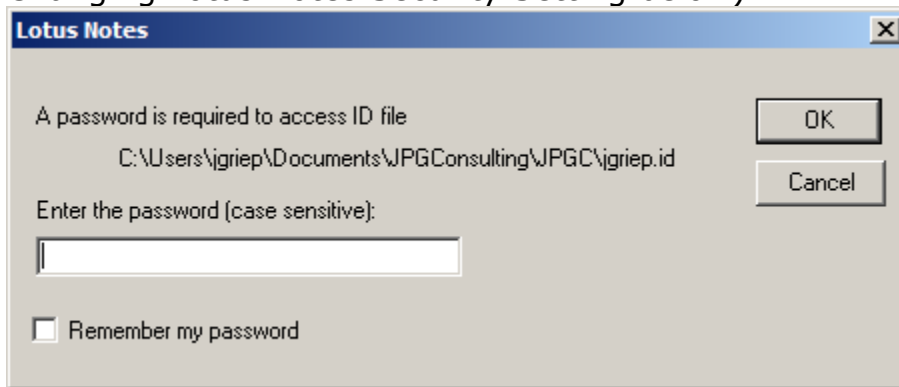
Once you hit the Close button, the EZNConnector.exe is launched (except on XP where you can now restart the computer or Windows Search service and then manually start EZNConnector.exe for the first time).

This background task services the requests by the indexing process and requests for previewing content. When EZNConnector.exe is not already running, EZNConnector.exe will pop-up when it needs to either index your mail or the user initiates a search with mail results and tries to preview those results. Once the EZNConnector.exe process is running, it will run until you manually end the process (e.g. via File/Exit or Task Manager) or shut-down the computer.

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Enter your Notes password and click OK.

**Note:** You can minimize the necessity of logging into Notes and EZNConnector.exe by either selecting the "Remember my password" checkbox or by changing a security setting in Lotus Notes (see Changing Lotus Notes Security Setting below).



If you fail to enter the correct password, EZNConnector.exe will prompt you to enter the correct password.

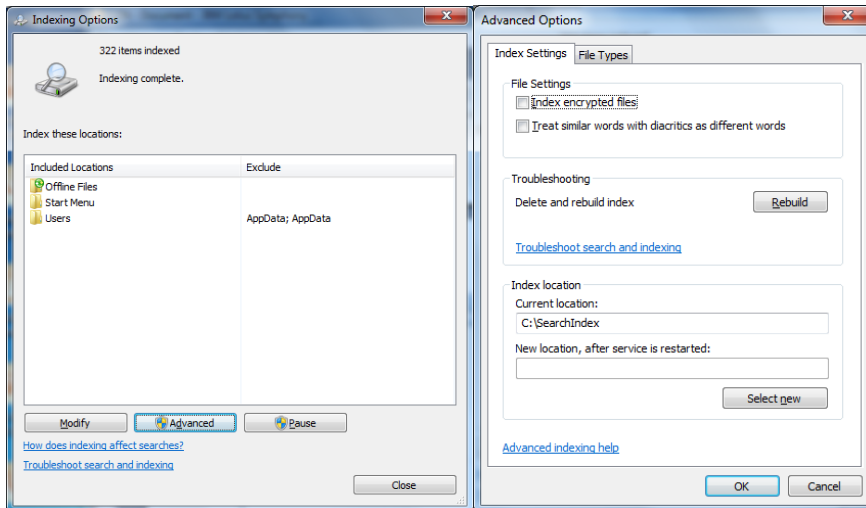
### ***Step 6***

Once the installation is complete and EZNConnector.exe is running, then Restart your Computer **or** Restart the Windows Search service.

#### ***Step 6a***

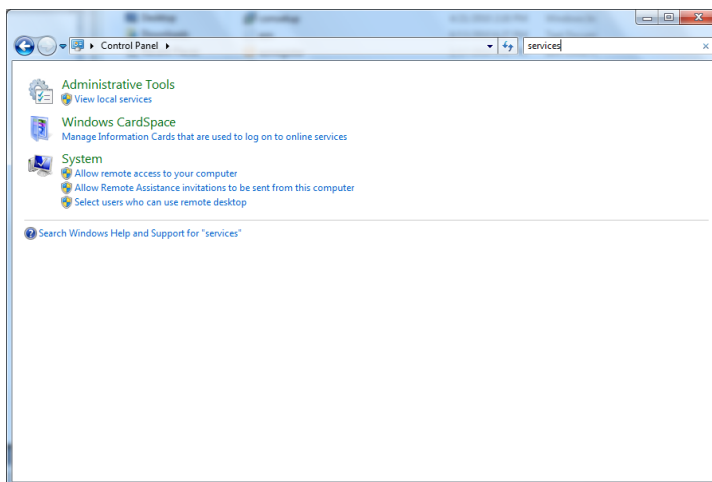
If you have had any previous Evaluation versions installed, you will need to rebuild your index. Once the computer has restarted and EZNConnector.exe is running, go to indexing options and select the Advanced button, and click Rebuild.

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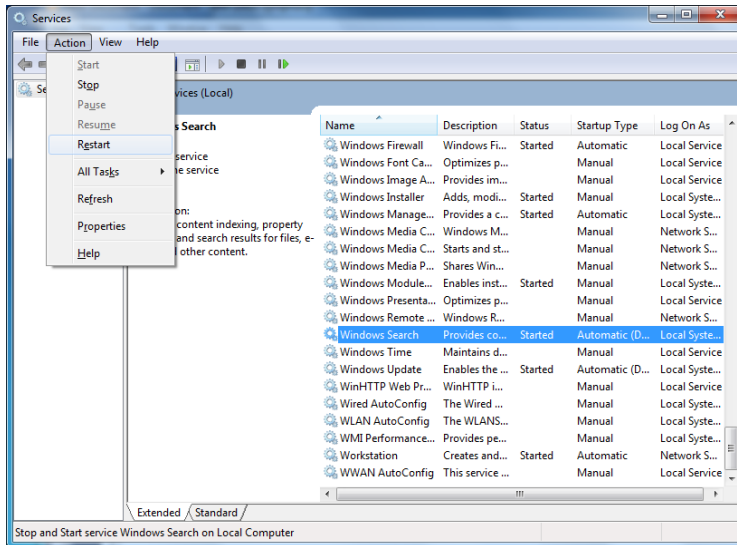
## **Restarting or Stopping the Windows Search service**

First, open the Control Panel and type "Services" in the upper right hand corner. Then select the "View local services" link.



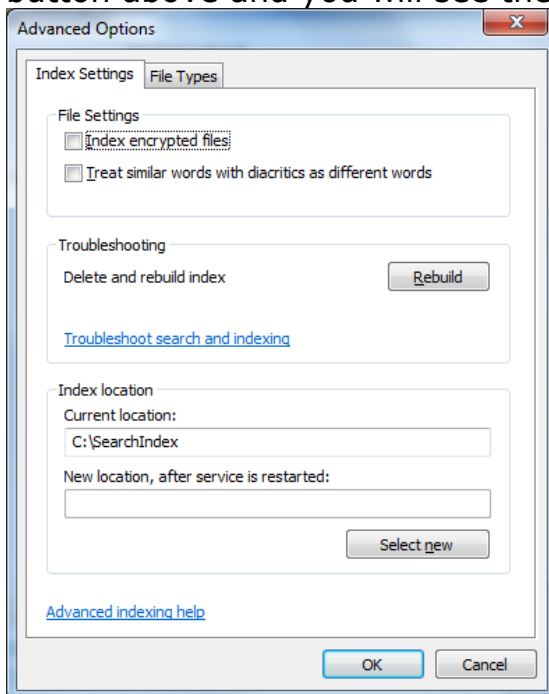
Once the services window is opened, select the Windows® Search service and select Action/Restart:

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## **Rebuilding the Index**

If you need to rebuild the index for some reason, select the Advanced button above and you will see the following dialog:



Select Rebuild to recreate the index.

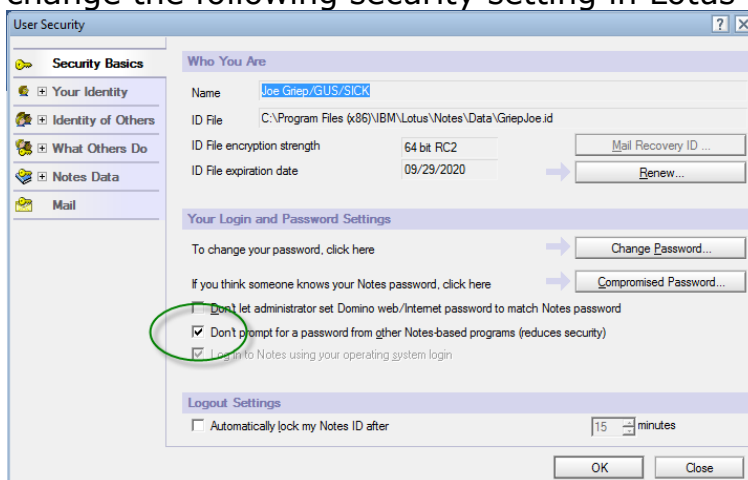
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### Changing Lotus Notes Security Setting

EZNConnector.exe is a background task that services requests by the indexing process and for previewing content. It will prompt you for your Notes password in order to perform its task it needs your Notes password.

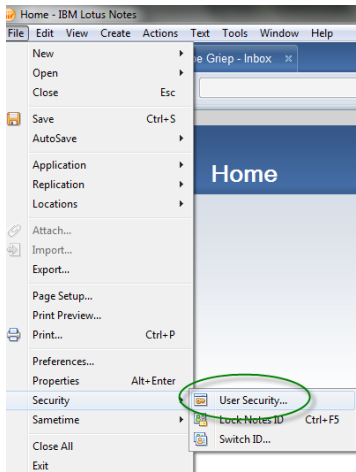
When EZNConnector.exe is not already running, EZNConnector.exe will pop-up when it needs to either index your mail or the user initiates a search with mail results and tries to preview those results. Once the EZNConnector.exe process is running, it will run until you manually end the process (e.g. File/Exit or Task Manager) or shut-down the computer.

To avoid having to log into EZNConnector.exe you can either select the "Remember my password" check box on the password prompt or change the following security setting in Lotus Notes:



To get there go to file/security/user security:

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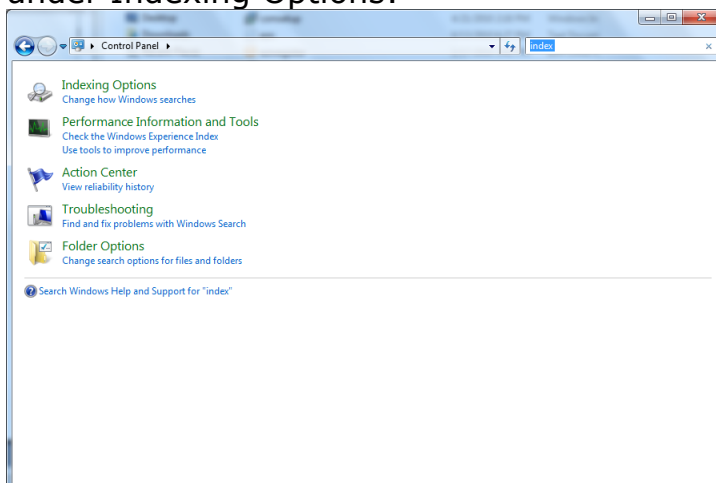


By changing the above security setting, EZNConnector.exe will be automatically get logged in, when Lotus Notes is open. Therefore, if the user has Lotus Notes open and EZNConnector.exe needs to be running and is not, EZNConnector.exe will open and close in an instant and will continue running until you manually end the process (i.e. Task Manager) or shut-down the computer.

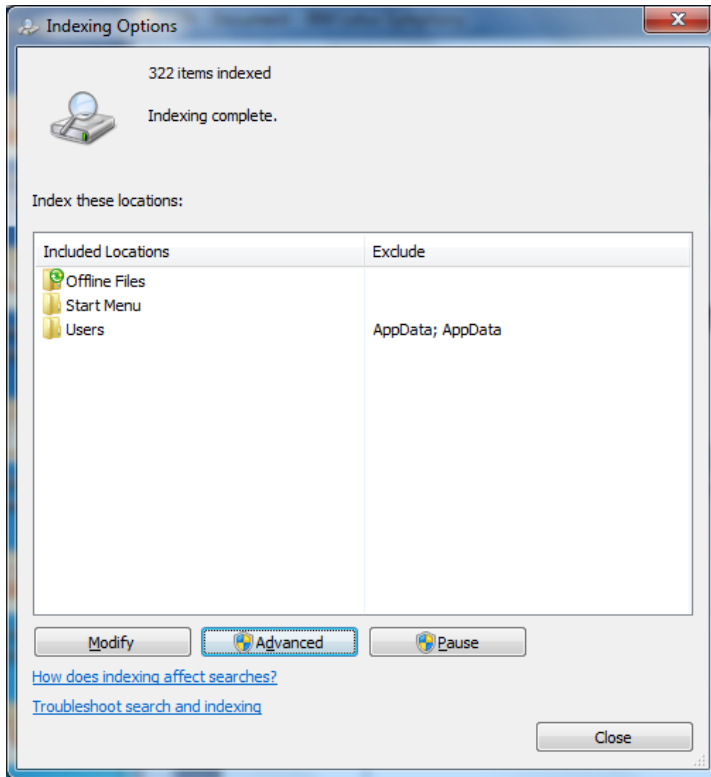
Changing these security settings is optional and not required for the product to operate.

## **Verifying Installation**

Go to the control panel again, and search for Index. Select the link under Indexing Options:



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After installation, you should see the number of indexed items changing.

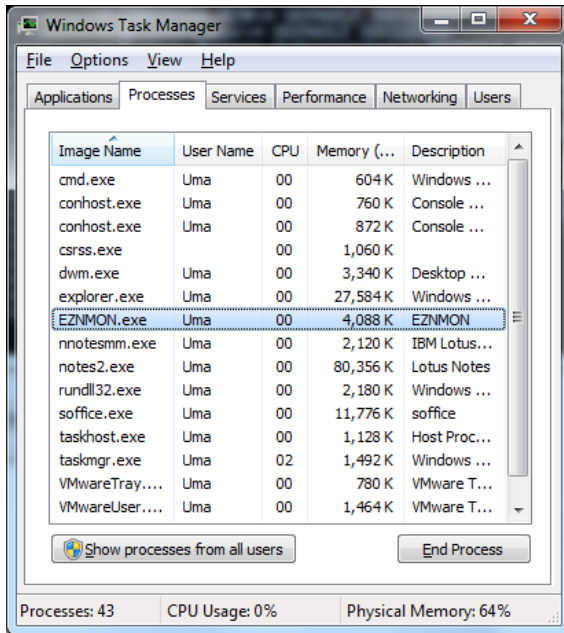
If the index items are not increasing, verify that the EZNConnector task is running.

Open Task Manager and within the tab processes verify that EZConnector.exe is running.

The screenshot below shows the task manager with the EZNConnector.exe task highlighted. There should only be one instance running.



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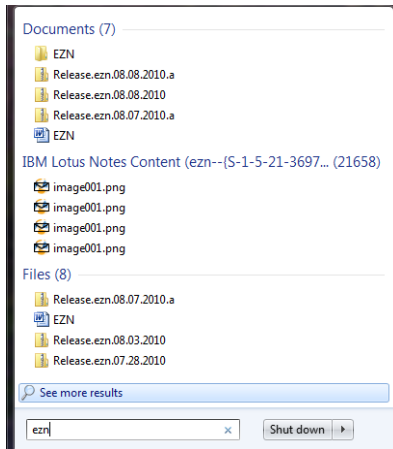


## **Manually start EZNConnector**

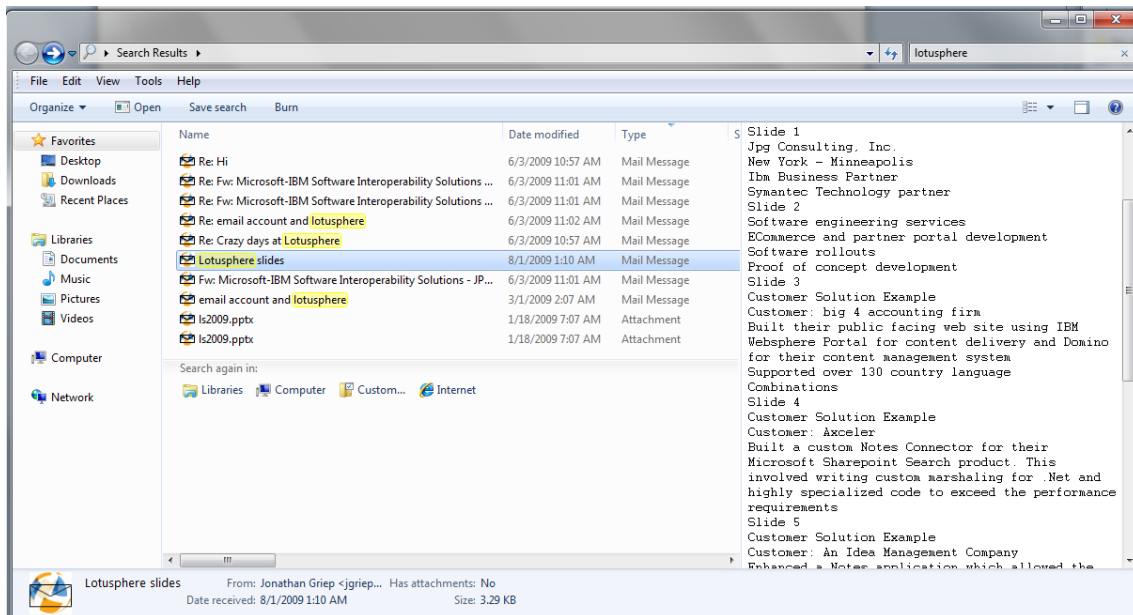
If the task is not running, you can restart it by navigating to the Lotus Notes directory and double clicking on it. You should be prompted again for your Lotus Notes password.

This process is used to tell the indexer what to index and retrieves the content for the indexer and the document preview facility. Once the initial index is built, it does incremental checks to see if there is additional content to index.

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The above picture shows a search initiated from the Start button. The URL prefix for a Lotus Notes search result is EZN. By searching for EZN, you can quickly see if there is indexed content. If you click "See more results", the following window is shown once a message is selected. It shows the preview of a message.



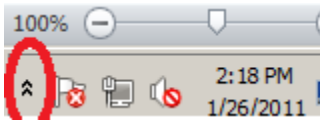
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### **Security**

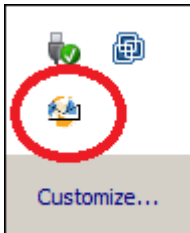
EZ Notes Search works by sending all the content from your mail, mail archives and any selected application databases to the Windows Search Indexing facility. The indexed content is tied to the current Windows user identity in the index. When a search is done, only the content indexed for the logged in user is searched and returned. If another user logs onto that computer they will not see search results from Lotus Notes content indexed for another user.

The user will need the IBM Lotus Notes password to preview their indexed content or to open IBM Lotus Notes to see the content or any attachments.

### **Displaying EZNConnector.exe**



Click the double up arrows and something like this should appear:



Double click on the indicated icon and EZNConnector should be restored. It may be restored in the minimized state.

### **Clear Cached Password**

If you selected the checkbox to remember your password and want to clear the cached password, select the File/Clear Password menu item in EZNConnector.exe.

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## **Index Databases not located in the Notes Data Directory Tree**

Suppose you have installed Lotus Notes in c:\notes and have put your Notes archive databases in another directory outside of the c:\notes\data directory tree: c:\users\JoeUser\documents\archives.

There is a new menu item on the EZNConnector under the Edit menu. Select Add Application... A file selection dialog box will appear. Navigate to the mail file or application and push ok. In order to select an application database, you must purchase the "Mail, Archives and Applications" edition of the product. See [www.notesconnectors.com](http://www.notesconnectors.com) if you wish to purchase this product.

## **Refreshing The Indexed Databases List**

EZNConnector.exe includes a menu item, Edit/Refresh, which allows you to refresh the database list.

## **Determining Your Product Version**

EZNConnector.exe includes a menu item, Help/About, which displays your product version. It could be one of the following:

- EZ Notes Search: Mail and Archives V2
- EZ Notes Search: Mail and Archives V2 Trial
- EZ Notes Search: Mail, Archives and Applications V2

The only trial version available is for the Mail and Archives edition.

## **Customization**

The software installs a database named eznregister.nsf. Currently this is only used for the Appointment, Message, Notice and Task form design elements found in it. These forms are used to render mail or application Notes Documents when they are previewed. You can modify these forms as you see fit to customize the preview of the content.

If you have non-standard forms in your mail database, use IBM Lotus Notes Designer to add an RTF rendering version of the form to

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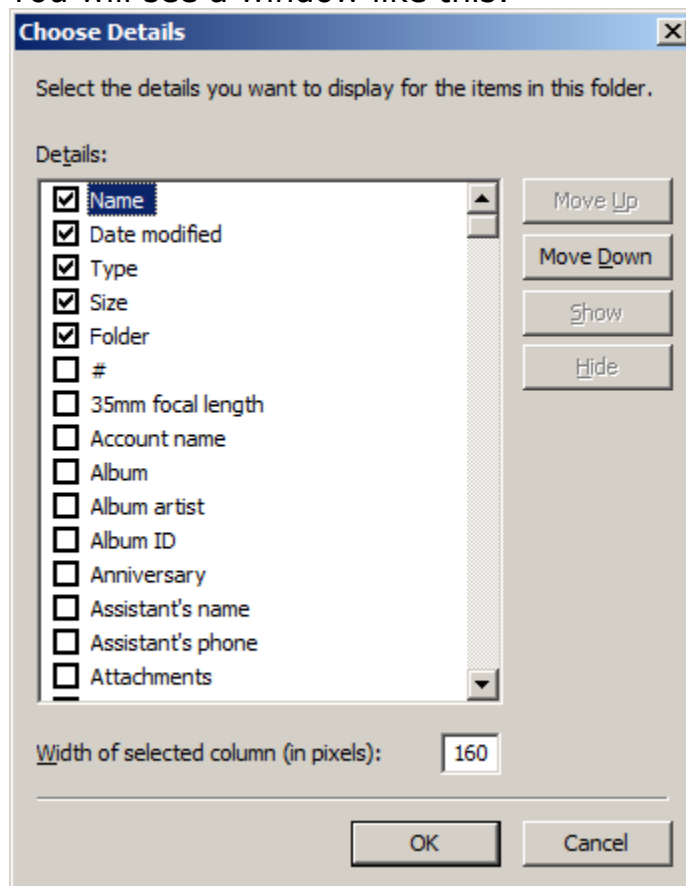
eznregister.nsf. Make sure it uses the same name as the Form field of those documents.

This feature is very useful for applications. Not all features of the document will render in the RTF conversion process. If you add a Form to this database, it will get used instead to render the document.

## **Customizing Windows® 7 Search Results**

It is possible to show different columns on Windows® 7. To do this:

1. Make sure you select Organize->Layout->Menu Bar option to make sure the menus appear in the search results window:
2. Select View->Choose Details
3. You will see a window like this:



Scroll down until you find the From check box. Select it and you will find a new column is added to the end of the search results.



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The results will not appear until you rebuild the index.

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### **Troubleshooting**

#### ***Starting Indexing***

Sometimes there are problems getting the indexer to start indexing the content. In order to remedy this:

- Reboot your machine
- Rebuild the entire index

If during the rebuild, EZNConnector is launched automatically, then indexing will occur. The first time you index your content, it is best to let the indexer finish. After that incremental indexing will occur on new and modified content.

#### ***Launching Notes***

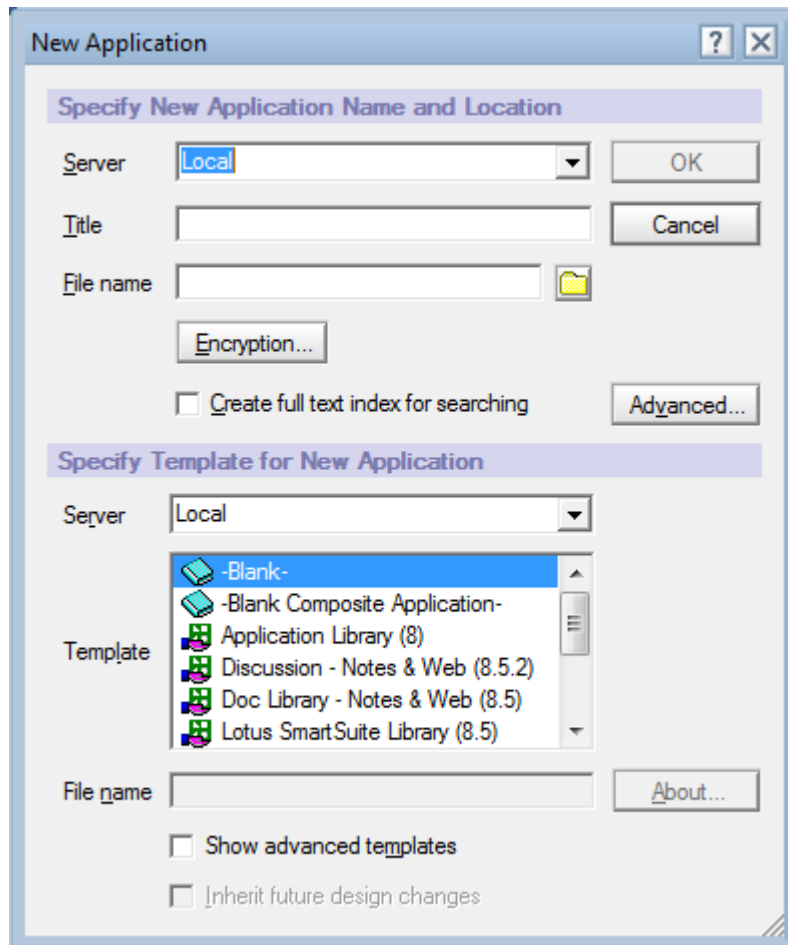
Some users have reported problems occur when attempting to open a search result in Lotus Notes. Upon investigation, it was found that they had previously installed Microsoft's Lotus Notes Protocol Handler Add-in for Windows Desktop Search. Users that have installed this old protocol handler should uninstall it when using EZ Notes Search.

#### ***Providing Notes for Data Analysis***

You may be asked by our support team to provide a copy of a mail message/note for analysis to resolve a defect. If this is the case, please follow the following procedure:

1. Open Lotus Notes and Select File->Application->New...
2. This dialog will appear:

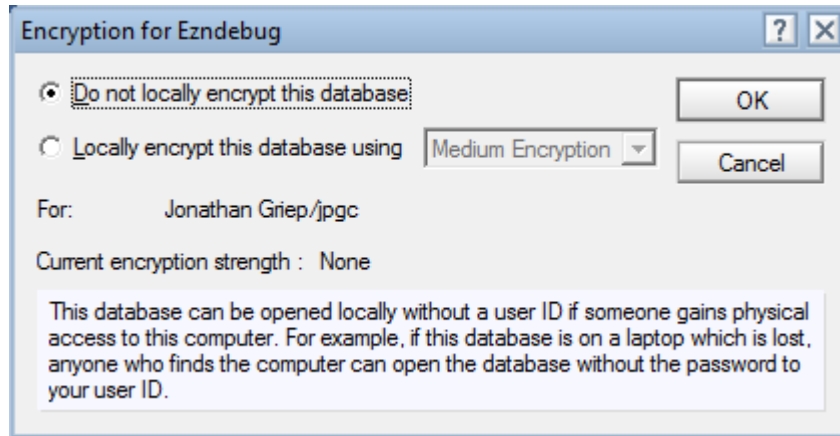
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3. Fill in the title with EZNDebug, the filename will automatically populate with EZNDebug.nsf.
4. Use the folder icon to select a location to store the database.
5. Click Encryption... and this dialog will appear:



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6. Make sure you select “Do not locally encrypt this database” and select OK
7. Select OK in the “New Application” dialog
8. The newly created database will open
9. Find the mail message/note you need to copy and use Edit->Copy
10. Navigate back to the new EZNDebug.nsf database and use Edit->Paste
11. Close the database
12. Close Lotus Notes
13. Send the EZNDebug.nsf database to [jgriep@jgriep.com](mailto:jgriep@jgriep.com) with a Note describing the problem.

### ***Latest Troubleshooting Information***

Visit our blog for the latest troubleshooting information:  
<http://notesconnectors.blogspot.com/> . There is also other information in the blog posts about using advanced filters to refine your search results.