



PlanetPress Search User Guide

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Overview

This PDF documentation covers **version 7.3**. To view the documentation of previous versions please refer to the PDF files available in the *Downloads* section of our website:

<http://www.objectiflune.com/OL/Download/DownloadCenter>.

Icons used in this guide

Some icons are used throughout this guide in order to catch your attention to certain particular information.



Notes: This icon shows you something that complements the information around it. Understanding notes is not critical but may be helpful when using PlanetPress Search.



Warnings: This icon shows information that may be critical when using PlanetPress Search. It is important to pay attention to these warnings.



Technical: This icon shows technical information that may require some technical knowledge to understand.

Other Documentation

For other related documentation , please see the drop-down menu at the top-right corner of this page.

Understanding PlanetPress Search

This chapter explains how PlanetPress Search works and how to configure it to search one or more PlanetPress Image PDF archives.

There are three key points to understand with respect to how PlanetPress Search works:

1. Every search you perform is done on a **search database** that PlanetPress Search builds from the information in the PDI files generated by PlanetPress Image.
Although the PDI file contains all the information PlanetPress Search needs to perform a search, PlanetPress Search uses databases to eliminate the need to open and search individual PDI files, making searches faster and more efficient. See ["Search Database" \(page 10\)](#) for help understanding databases.
2. You define the contents of a search database.
You specify the PlanetPress Image PDF folders you want to include in the search database.
3. You can have as many search databases as you need.
For each search database you want to build, you first create a **search profile** and then build the database. A search profile can reference exactly one search database, so each search database you want to build requires a separate search profile. See ["Search Profile" \(page 9\)](#) for a complete description of search profiles.

Note that since PlanetPress Search searches the database and not the PDF and PDI files themselves, if the PDF files indexed in the search database change, you must update the database to ensure searches yield accurate results. For example, if you have a document that executes in PlanetPress Image on a weekly basis, you would also update the search databases that contain the index information for that document on a weekly basis. See ["Search Database" \(page 10\)](#) and in particular ["Updating a Search Database: Refresh vs. Rebuild" \(page 25\)](#).

Also note that you can configure PlanetPress Image to automatically add information to an existing search database when it executes a document. If a record for the document already exists in the database, PlanetPress Image adds the index information to the database. If the document does not yet exist in the database, PlanetPress Image adds a new record for the document along with the index information for the document, to the database. This is useful when you want to eliminate the need to refresh or rebuild the database from within PlanetPress Search. Consult the **PlanetPress Workflow Tools User Guide** for more information on this feature.

In a network installation of PlanetPress Search, it is common to want to restrict access to search databases in order to ensure the integrity of search results. See ["Database Integrity in a Network Installation" \(page 42\)](#).

Search Profile

A search profile is a file that contains information about a search database. PlanetPress Search uses the search profile to determine what database to search, and how to connect to that database. It also consults the search profile for information related to updating and searching the database.

A search profile is a distinct file from the search database, and can exist in any folder. Search profiles use the **.prf** file name extension. The **ppsearch.prf** file in the PlanetPress Search program folder is the default search profile.

There are several important points to understand with respect to search profiles:

- A search profile references exactly one search database. You can create many search profiles that reference the same database but a single search profile cannot reference more than one database.
- You can create as many search profiles as you require.
- Create a Database During the Load of a Search Profile

Search Database

A search database, sometimes referred to simply as a database, is what PlanetPress Search searches when you perform a search. The database contains the index information for the documents in one or more PlanetPress Image archive folders. You create, update, and search a database through a search profile.

PDI File

You create the index terms for a document in PlanetPress using data selection objects. Each data selection object contains at most one index term, and the name of the index term is the name you define for it in the data selection object. A document can contain any number of index terms.

When PlanetPress Image executes a document, it gathers all the index terms you defined in the document and saves them in a PDI file. It creates one PDI file for each PDF file it generates. The PDI file bears the same name as the PDF file. For example if the PDF file is **invoice.pdf**, the corresponding PDI file is **invoice.pdi**. The PDI file is an ASCII file. Note that you can use the Digital action in a PlanetPress Suite Workflow Tool to produce a PDI file in XML format (rather than the native format PlanetPress Image generates). However PlanetPress Search reads only the native format produced by PlanetPress Image.

PlanetPress Search uses the information in the PDI files to build its search databases.

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Start PlanetPress Search

Since version 7.3, PlanetPress Search is a standalone software that can be installed individually or as part of the PlanetPress Suite along with other software in the suite. This procedure describes how to start PlanetPress Suite in version 7.3 and higher:

1. Log on to the computer where you want to use PlanetPress Search.
2. In the Start menu, click on (All) Programs, PlanetPress Suite 7 and click  PlanetPress Search.
(Alternatively, you can double-click on the  PlanetPress Search icon on your desktop.)

The main PlanetPress Search window will then open.

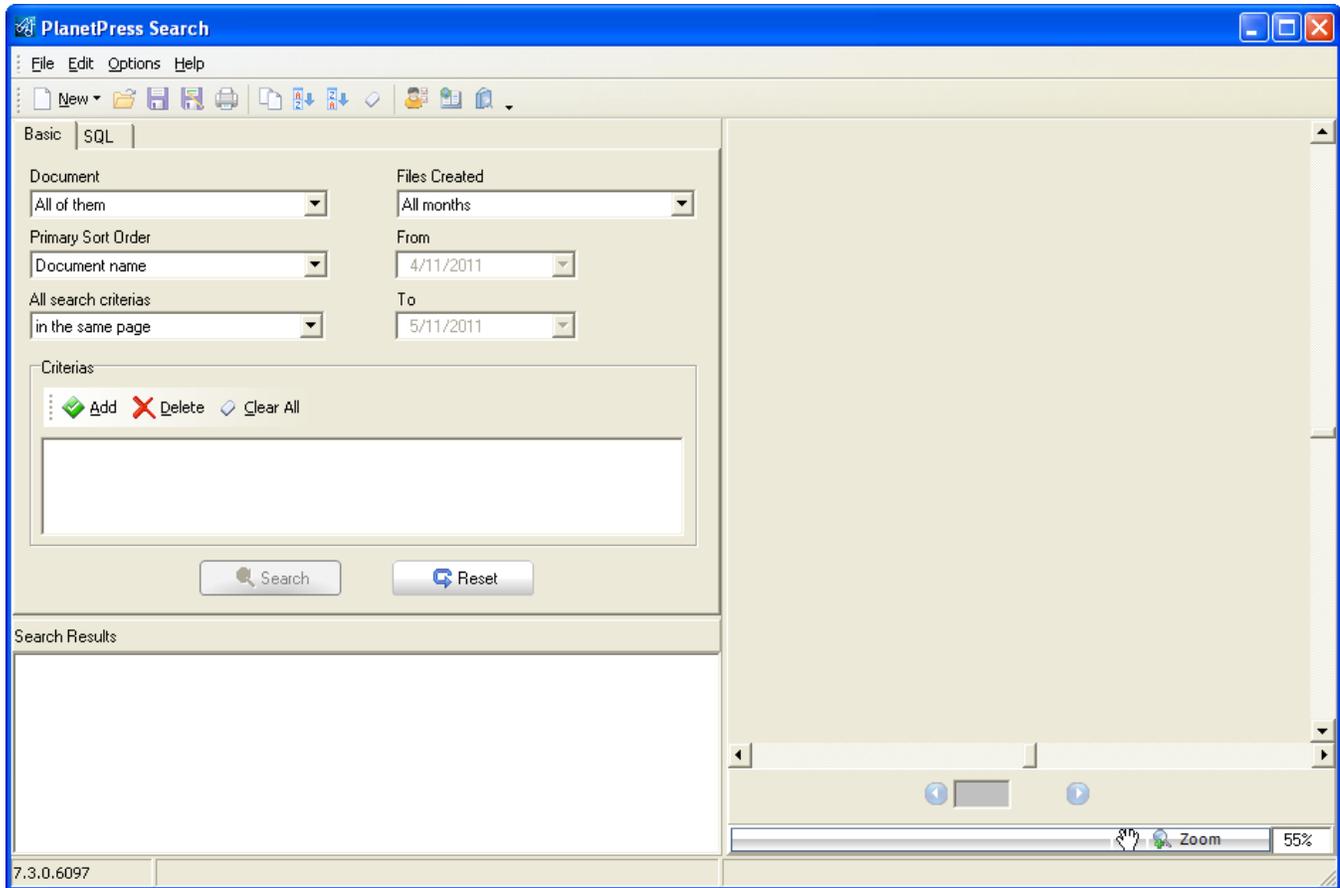
To start PlanetPress Search in earlier versions of PlanetPress Suite

1. Log on to the computer where you want to use PlanetPress Search.
2. In the Start menu, click on (All) Programs, then locate your installation of Adobe Reader. This can be either Adobe Acrobat Standard, Adobe Acrobat Reader, etc.
3. In the Adobe product you launched, click on the  icon in the toolbar.

The PlanetPress Search Program Window

The PlanetPress Search program window is divided into 4 distinct sections:

- The Program Toolbars
- The Search Panel
- The Results Panel
- The PDF Viewer



You use the Search Configuration area to configure and launch a search. The currently loaded search profile determines what search database is available in the Search Configuration area. See ["Determine the Currently Loaded Search Profile" \(page 27\)](#) for help determining which search profile is currently loaded. The Document box near the top of the Search Configuration area contains a list of all documents in that database.

The contents of the Search Configuration area depend on the type of search selected in the Search type box (Basic or SQL). The Search type box at the top of the Search Configuration area determines how you define the search criteria for a search. If you select SQL, the Search Configuration area changes to accept an SQL statement.

See "Perform a Search Using a Basic Query" (page n) and "Perform a Search Using an SQL Query" (page n) for help defining searches using Basic and SQL search types, respectively.

The Results area displays the results of the last search you performed. You use it to examine and select search results. You can hide the Search Configuration area to increase the size of the Results area. See ["Change the View on Search Results" \(page 31\)](#).

The Search Toolbar

The PlanetPress Search toolbar offers a few shortcuts that simplifies the use of the most common features of PlanetPress Search.

From left to right, the default icons visible in the toolbar are:

- **New:** Click to display a submenu where you can create a new search profile.
- **Open:** Click to open an existing Search Profile.
- **Save:** Click to save the current Search Profile.
- **Save As:** Click to save the current Search Profile as a new file.
- **Print:** Click to print the search results (only active when search results are available).
- **Copy Selected Nodes:** Click to copy the selected search results to the Windows Clipboard.
- **Sort Ascending:** Sort the Search results in Ascending order (by the Primary Sort Order).
- **Sort Descending:** Sort the Search Results Pane in descending order (by the Primary Sort Order).
- **Clear Results:** Clear the Search Results pane.
- **Preferences:** Open the User Options dialog.
- **Language:** Opens the Language Change dialog.
- **Help:** Opens the PlanetPress Search User Guide (this site).

The Search Panel

The Search Panel provides two different methods for searching through your Search Database.



If the Search Database is empty, you will not be able to click the Search button, and the SQL tab will remain empty.

Basic Search

The Basic Search panel is used to provide an easy to use search functionality while remaining flexible in its use. This procedure describes how to perform a search using a Basic query to define the search criteria. Basic query is useful for users that are unfamiliar with Structured Query Language (SQL) or find it more convenient to define the query without using SQL. PlanetPress Search constructs the SQL query from the set of search criteria defined using the drop-down lists and the Criteria Dialog.

To perform a basic search:

1. Make sure a search profile has been loaded. For details, see [Load a Search Profile](#).
2. Select the Basic tab from the Search Panel.
3. Select the appropriate options from the drop-down menus:
 - **Document:** Select from a list of available document titles located in the Search Database to filter the results for a specific document title, or select *All of them* to ignore the document title. The Document title refers to the PlanetPress Talk ID in the document's properties in PlanetPress Design (see [Set up a document](#))

- **Primary Sort Order:** Determines how the search results will be sorted (results are always ascending). The 3 available options are:
 - **Document name:** Sorts by the name of the document (the same as the ones seen in the Document drop-down above). Note that selecting this option when filtering by document results in no sorting at all.
 - **Date:** Sorts by document creation date.
 - **PDF Name:** Sorts by the PDF file name.
 - **All search criteria:** Determines whether the search criteria should be true only within a single Page of the PDF file, or anywhere in the pages.
 - **Files Created:** Filters the results by date. Use the drop-down to select a pre-determined setting (such as "Today" or "Last six months" for example) or select **Custom** to enable the **From** and **To** options to manually set the date filter. When selecting a pre-determined setting, the **From** and **To** box below will display the actual dates that the period corresponds to.
 - **From/To:** Use these boxes to specify the start and end dates, respectively, when you select **Custom** in the **Files created** box. You can enter dates in these boxes in two ways. You can click in the box and modify the date, or you can click the arrow on the right of the edit box to display a calendar that reflects the date that currently appears in the edit box. Use the arrows at the top of the calendar to navigate through the months, and click on a date to select it. When you select a date, the calendar disappears and the edit box displays the selected date.
4. Add search criteria to your search (see below).
 5. Click **Search** to initiate the search or **Reset** to reset all the options to their defaults.



The Search button is only enabled if there is at least one PDF in the Search Database that is currently used.

Adding a Search Criterion

While some filtering and sorting is made through the Document and Files Created options, searches are mainly defined through a set of criteria which are defined in the Criteria box.

1. Click the Add button. A new criterion line appears.
2. Enter or select the information in the 3 options of the criterion line:
 - **Search Field (Left):** Select which field to search from. Each field present in the PDF document will be listed here, along with the PDF Name entry (which is automatically present).
 - **Search Operator (Center):** Select from a list of possible operators such as Start With, End With, Equal To, Contains, Greater Than, etc.

SQL Search



Once search parameters are selected in the Basic tab, clicking on the "SQL" view displays the SQL equivalent of the Basic search options and criteria.

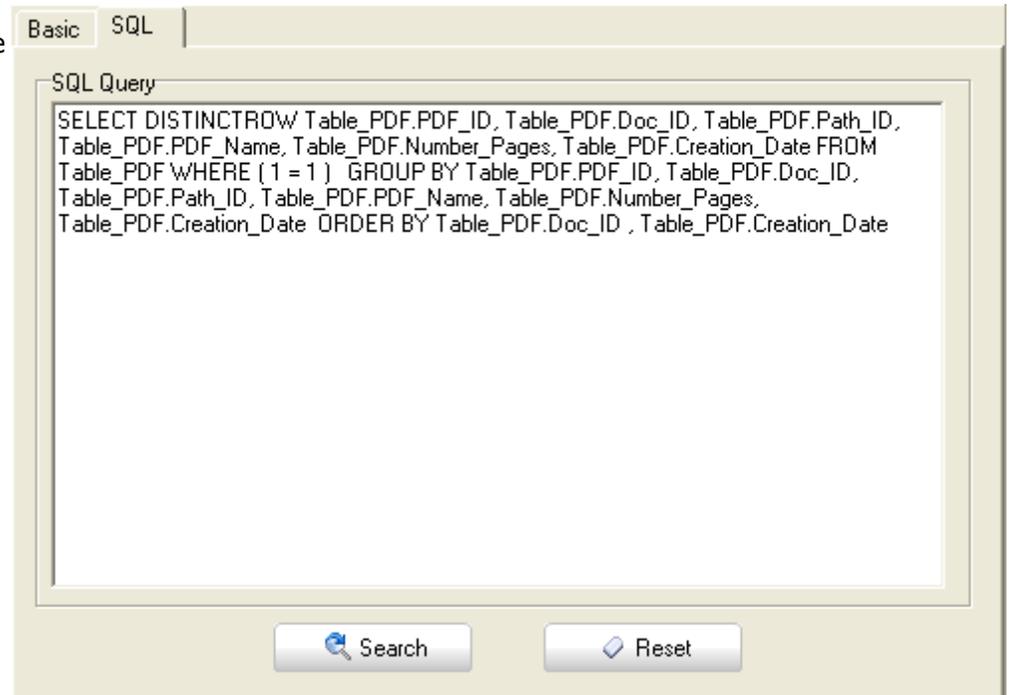
The SQL Search Panel is used to give much more control and power while creating a search query. It is assumed that some knowledge of SQL Queries is available to the user before he attempts to use this tab.

To search using the SQL tab:

1. Enter your SQL query in the SQL Query box
2. Click Search to execute the query.

The default search query for an Access Search Database (which returns all PDFs in the database) is this:

```
SELECT DISTINCTROW Table_PDF.PDF_ID, Table_PDF.Doc_ID, Table_PDF.Path_ID, Table_PDF.PDF_Name, Table_PDF.Number_Pages, Table_PDF.Creation_Date FROM Table_PDF WHERE ( 1 = 1 ) GROUP BY Table_PDF.PDF_ID, Table_PDF.Doc_ID, Table_PDF.Path_ID, Table_PDF.PDF_Name, Table_PDF.Number_Pages, Table_PDF.Creation_Date ORDER BY Table_PDF.Doc_ID , Table_PDF.Creation_Date
```



The Search Results Panel

The Search Results Panel displays the results for any search that is made from [The Search Panel](#).

Set User Options

You can set a number of user options in PlanetPress Search. With the exception of two user options, **Use default profile** (in Program startup options) and **Database access for new profiles** (in Search options), all user options apply to the currently loaded search profile and are saved with it. Each time you load a search profile, the user options settings adjust to reflect those of the newly loaded profile.

Note that if the file containing the search profile is read-only, you cannot save any of the modifications you make to the user options settings. In this case, any changes you make to the user options settings are available only until you load a different profile or exit PlanetPress Search. It is common to make search profiles read-only in a network installation. See ["Database Considerations in a Network Installation" \(page 42\)](#).

Here are the user options available in this dialog:

Program startup options tab

- **Select document:** Select the document that appears in the Select document box in the Search Configuration area of the PlanetPress Search Program window by default when PlanetPress Search loads this search profile. Select **None** if you do not want PlanetPress Search to display any document when it loads this search profile. This option applies only

to the currently loaded search profile.

- **Filter date:** Select the date filter that appears by default when PlanetPress Search loads this search profile. The date filter appears in the Date boxes in the Search Configuration area of the PlanetPress Search Program window, and constrains the search to PDFs created during the specified time period. Select None to include all PDFs.
- **Use default profile:** Select to specify a search profile to load on startup. Use either the edit box or Browse button that appear to specify the search profile. Clear to load the last used search profile on startup. If you have never created a search profile (for example, if this is the first time you are starting PlanetPress Search), PlanetPress Search loads the default search profile, **PSearch4.prf**, located in the PlanetPress Search program folder.

Printing options tab

- **Printer to use:** Select the printer to use when you print from PlanetPress Search, with this search profile loaded.

Search options tab

- **Multi-page mode:** Select to set the total number of pages when generating a PDF with the search result when you view, print, or save that result. Use the spin box to set the number of pages. For example, consider that you have Multi-page mode selected and set to 2, and you print a search result that appears on page 15 of the PDF. The printed result consists of two pages: page 15 and 16 of the PDF. This setting applies to the currently loaded search profile.
- **Open PDF after creation:** Select to have PlanetPress Search automatically open a PDF that it creates from search results. This setting applies to the currently loaded search profile.
- **Database access for new profiles**
- **Use Windows NT integrated security:** Select to use the same user name and password on the SQL database as you use to log on to the computer on which you are running PlanetPress Search. You use this option when you create a new search profile for an SQL Server database. PlanetPress Search requires this information to construct the connection string for the database. It saves the connection string in the DatabaseDirectory of the search profile.
- **Logon with User ID/Password:** Select to specify the user name and password to use with the database, in the User ID and Password boxes. You use this option when you create a new search profile for an SQL Server database. PlanetPress Search requires this information to construct the connection string for the database. It saves the connection string in the DatabaseDirectory of the search profile, encrypting the password before saving it. The value that appears by default in the edit box for this option is the last one saved to a profile.

Database options tab

This tab sets the options for creating, rebuilding, and refreshing the database associated with this search profile. Note that if the search profile has its ReadOnly entry set to 1 (as for example in a network installation), these options are not available in the User Options dialog box.

- **Connection timeout:** Adjust to set the number of seconds PlanetPress Search waits for a response from the database before reporting a connection failure.
- **Refresh databases:** Select the frequency of automatic database refreshes for the database associated with this search profile. Each time PlanetPress Search loads a search profile, it can automatically refresh the database associated with that search profile. Select Never to prevent a database refresh when PlanetPress Search loads this search profile. Select Every time to refresh the database every time you load this search profile. Select Once a day to limit the database refresh to once every 24 hours (for example, if you load this search profile 6 times in a 24 hour period, PlanetPress Search only refreshes the database associated with it once during that period). Select **Every time** to refresh the database every time you load this search profile.
- **Enforce global table creation:** Select this option if you are using an SQL database.
- **Escape strings:** Select this option if you are using a MySQL database.

To restore default user options settings:

From the User Options dialog, click on Reset All. This will reset the user options for the currently loaded search profile.

Change Language

This procedure describes how to change PlanetPress Search's display language .

To change the PlanetPress Search display language:

1. Choose **Options | Select Language**.
2. Select the new language.
3. You can also enable Use System Default Locale to mirror your language settings, as defined in the Regional and Language Options of the Windows Control Panel.

Exit PlanetPress Search

This procedure describes how to exit PlanetPress Search.

To exit PlanetPress Search:

- Choose **File | Exit**.
PlanetPress Search updates the currently loaded search profile and exits.

Search Profiles And Databases

In order to give the ability to search your document archives, PlanetPress Search must use a database in the background, with which it connects using a Profile. While you may have multiple profiles on one or more computers connecting to a single database, a search profile can only connect to a single database.

This chapter explains how to set up and manage profiles and databases.

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Creating a Search Database

When you create a search database, you first define the set of PlanetPress Image folders you want to include in the database, and whether you want to include their subfolders. PlanetPress Search then examines the **FormName** entry in all the PDI files in those folders, and creates a record in the database for each distinct document referenced by the **FormName** entry. The value of the **FormName** entry, minus the file name extension, also becomes the name of the record for that document in the database. For example, if the **FormName** entry is **survey.ps4**, the corresponding database record bears the name **survey**. See ["PDI File Structure" \(page 43\)](#) for a description of the **FormName** entry.

After PlanetPress Search creates a record for each distinct document it found in the folders, you populate each record with the index information found in the PDI files for that document. See [Build the Contents of a Database for the First Time](#).

Create a New Search Profile that Uses an SQL Server Database

This procedure describes how to create a search profile that uses an SQL Server database.

Pre-Requisites for SQL Server database connectivity:

- An SQL Server driver must be installed on the system (this is available by default in any supported version of Windows)
- The currently logged on user must have access to the SQL Server instance through the network.
- A database must be created on the SQL Server. It is suggested to call the database `Search`.
- A username and password must be defined in the user options and this username must have access to the SQL Server and its Search database (see [Set User Options](#)).

To create a new search profile that references an SQL Server database:

1. In PlanetPress Search, choose **File | New | SQL Server Profile**.
2. In the Server name dialog, type in the server name or IP Address of your SQL Server, then click OK. If the SQL Server has an instance name, it should also be entered after a backslash (for example: `localhost\SQLEXPRESS`)
3. In the Database name dialog, type in the name of the database to be used, then click OK.
PlanetPress Search will now attempt to logon to the server and database specified.
4. If the connection is successful, a Save As dialog appears. Use this dialog to save the Search Profile file to a specific location on the hard drive. While a network path or mapped drive can be typed in manually in this dialog, it is strongly recommended to use a search profile on a local drive, for performance reasons.



PlanetPress Search, when opened, will automatically load the default search profile (`ppsearch.prf`) located in `C:\Documents and Settings\(current login username)\Application Data\Objectif Lune\PlanetPress Suite X\PlanetPress Search\`. If the search profile is located somewhere else, it will need to be opened manually each time PlanetPress Search is opened.

Once your profile is created, additional actions may be done on the profile:

- To share a profile on the network between multiple users, see [Sharing A Profile On The Network](#).
- To edit the profile manually to change additional options, see [Search Profile Contents Line by Line](#).

Create a New Search Profile that Uses an Access Database

The procedures here describe how to create a new search profile that uses an Access Database.

If you are creating a new search profile in a network installation, make sure you log on with the appropriate privileges to be able to save and edit the search profile. In network installations, restrictions on who can create and/or edit search profiles may be imposed to ensure the integrity of PlanetPress Search databases. See ["Database Considerations in a Network Installation" \(page 42\)](#).



Though an Access Database can be located on a network drive, it should never be shared between multiple search profiles or multiple users. Doing so will most likely corrupt the Access database or simply not work as Access databases are meant for nonconcurring use.

To create a new search profile that references a Microsoft Access database:

1. In PlanetPress Search, choose **File | New | Access Profile**.
The New Profile dialog box appears.
2. In the **New Profile** dialog box, navigate to the folder in which you want to save the new search profile, enter the name under which you want to save the new search profile and click **Save**.
PlanetPress Search prompts you to specify a folder in which to create the database.
3. Click **OK** and use the Select Directory dialog box that PlanetPress Search displays to select the folder in which to create the database. You can enter the path in the Selected folder box, or use the Current drive and Folders list to navigate to the folder.
In a standalone installation, the folder must be one for which the user has both read and write access. For optimum performance in this case, a folder on the local drive is recommended.

In a network installation, the folder must be one to which all users have read access. It is not necessary for the folder to be mapped on individual user computers but they must be able to access it through its Universal Naming Convention (UNC) file name (**\\servername\sharename\path\filename**).

The default folder for the database is the PlanetPress Search program folder.

4. In the **Select Directory** dialog box, click **OK**.

If the folder you selected already contains a database, PlanetPress Search prompts for confirmation to delete it (PlanetPress Search reserves the name **archives.mdb** for all the Microsoft Access databases it creates; thus it cannot create a new database in a folder that already contains an **archives.mdb** file). Click **Yes** to delete the existing database and create the new one, or click **No** to cancel the operation and return to the Select Directory dialog box to select a different folder.

If the folder you specified does not exist, PlanetPress Search prompts for confirmation to create it. Click **OK** to have PlanetPress Search create the new folder and create the new database in that folder, or **Cancel** to return to the Select Directory dialog box and select another folder.

Once PlanetPress Search creates the empty Microsoft Access database, **archives.mdb**, in the database folder, it updates the search profile to point to that database, and returns control to the PlanetPress Search Program window.

5. If necessary, adjust the options for this search profile. See ["Set User Options" \(page 15\)](#).
6. Build the database for the new search profile. See ["Build the Contents of a Database for the First Time" \(page 22\)](#).
7. Choose **File | Save** to save the search profile.

Create a New Search Profile that Uses an Oracle Database

The procedures here describe how to create a new search profile that uses an Oracle Database.



Because of how Oracle works, the computer where the Search profile is located must be on the same local network as the Oracle server.

Pre-Requisites for Oracle database connectivity:

- An Oracle driver must be installed on the system.
- The currently logged on user must have access to the Oracle database through the network.
- A database must be created on the Oracle server. It is suggested to call the database *Search*.
- A username and password must be defined in the user options and this username must have access to the Oracle server and its Search database (see [Set User Options](#)).

To create a search profile connected to an Oracle database

1. Open PlanetPress Search.
2. Go to **File, New, Oracle Profile...**
3. Enter the name of the Oracle database, provided by the database administrator then click **OK**.
4. Browse to the location you want to save the search profile (prf file).
5. Enter a name for the profile then click **Save**.

Once your profile is created, additional actions may be done on the profile:

- To share a profile on the network between multiple users, see [Sharing A Profile On The Network](#).
- To edit the profile manually to change additional options, see [Search Profile Contents Line by Line](#).

Create a New Search Profile that Uses a MySQL Database

This procedure describes how to create a search profile that uses an MySQL database.

Pre-Requisites for MySQL database connectivity:

- A MySQL driver must be installed on the system (available on MySQL.com)
- The currently logged on user must have access to the MySQL server through the network.
- A database must be created on the MySQL server. It is suggested to call the database `Search`.
- A username and password must be defined in the user options and this username must have access to the MySQL server and full privileges on the `Search` database (see [Set User Options](#)).

To create a new search profile that references a MySQL server database:

1. In PlanetPress Search, choose **File | New | MySQL Profile**.
2. In the Server name dialog, type in the server name or IP Address of your MySQL server, then click OK.
3. In the Database name dialog, type in the name of the database to be used, then click OK.
PlanetPress Search will now attempt to logon to the server and database specified.
4. If the connection is successful, a Save As dialog appears. Use this dialog to save the Search Profile file to a specific location on the hard drive. While a network path or mapped drive can be typed in manually in this dialog, it is strongly recommended to use a search profile on a local drive, for performance reasons.



PlanetPress Search, when opened, will automatically load the default search profile (ppsearch.prf) located in `C:\Documents and Settings\(current login username)\Application Data\Objectif Lune\PlanetPress Suite X\PlanetPress Search\`. If the search profile is located somewhere else, it will need to be opened manually each time PlanetPress Search is opened.

Once your profile is created, additional actions may be done on the profile:

- To share a profile on the network between multiple users, see [Sharing A Profile On The Network](#).
- To edit the profile manually to change additional options, see [Search Profile Contents Line by Line](#).

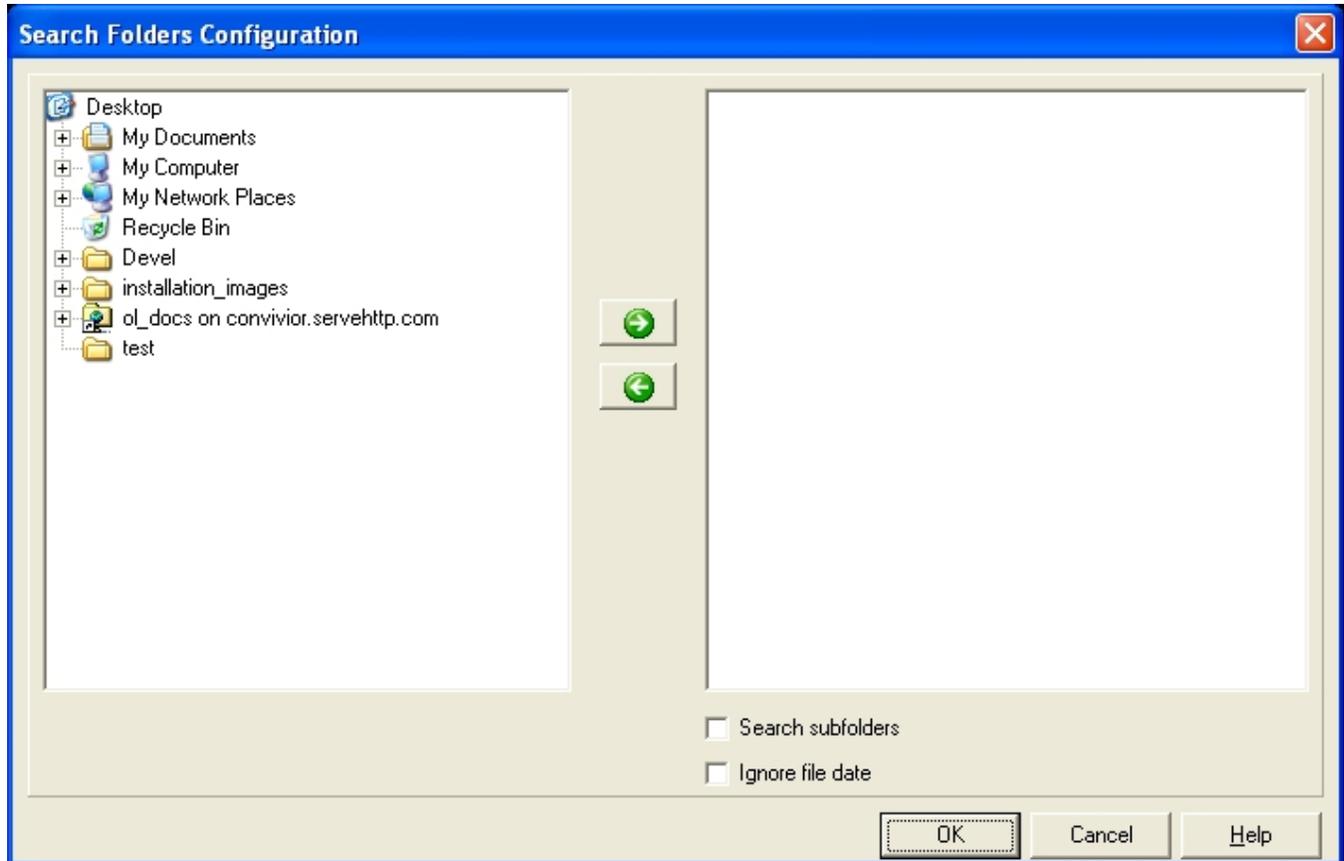
Build the Contents of a Database for the First Time

The procedure here describes how to build the contents of a database for the first time. You also use this procedure if you want to modify the list of archive folders an existing database includes.

The procedure assumes the search profile that references the database you want to build is loaded in PlanetPress Search and permits rebuilds of its database. In a network installation, it is common for the administrator to control database updates. See ["Database Considerations in a Network Installation" \(page 42\)](#).

To build the contents of a database for the first time:

1. If necessary, choose **Options | User Options**, click **Databaseoptions**, and adjust the settings for the database. In particular, you may want to adjust the Unattended database creation/update option. See ["Set User Options" \(page 15\)](#).
2. Choose **Options | Set Search Folders** and use the Search Folders Configuration dialog box that appears to select the PlanetPress Image archive folders to include in the database.
Note that in a network installation, you should verify that each folder you include is accessible to all users of this search profile. If a folder is not accessible, users cannot view any search result that references a PDF in that folder.



A. Navigator pane B. Archive folders list C. Add arrow D. Remove arrow

Navigate TO A FOLDER

Navigator pane: Use to navigate to each folder you want to include in the database.

add OR REMOVE archive folders.

Add arrow: Use to add a folder to the Archive folders list. Click the folder you want to add then click the Add arrow.

You can also add a folder by clicking a folder in the Navigator pane and dragging it to the Archive folders list.

Remove arrow: Use to remove a folder from the Archive folders list. Click the folder you want to remove then click the Remove arrow. You can also remove a folder by double-clicking it in the Archive folders list.

SPECIFY HOW TO HANDLE SUBFOLDERS

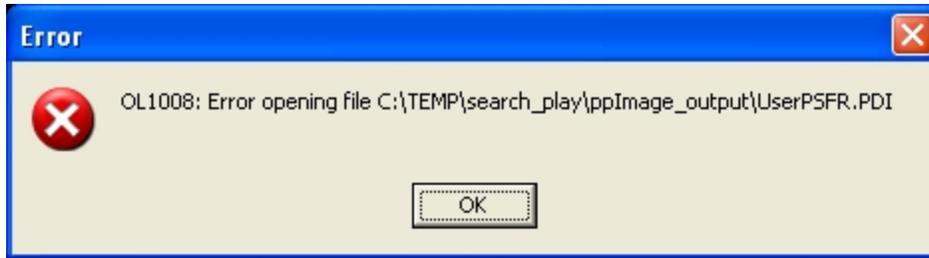
Search subfolders: Select to recursively include all subfolders PlanetPress Search finds in the folder, in the database.

Clear to have PlanetPress Search exclude any subfolders it finds in the folder, from the database.

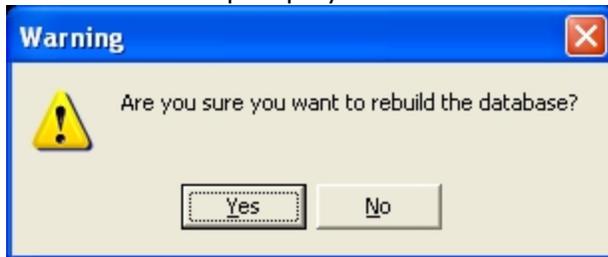
Ignore file date: Select to have PlanetPress Search read the contents of all PDI files in the folder, regardless of their creation date, when it refreshes the database. Clear to have PlanetPress read only those PDI files whose creation date is more recent than the date of the last refresh of this database. You use this option to reduce the time required to refresh the database, particularly when only a few PDI files have changed since the last refresh.

- Once you have selected all the folders to include in the database, in the **Search Folders Configuration** dialog box, click **OK**.

PlanetPress Search examines the archive folders you specified and for each document it finds, creates a record in the database. If you cleared the Unattended database creation/update option in the Database options of User Options, PlanetPress Search displays a message if it encounters an error. Click **OK** to continue.



- In PlanetPress Search, choose **Options | RebuildDatabase**. PlanetPress Search prompts you to confirm the build.



- Click **Yes** to confirm. PlanetPress Search populates each record in the database with the information from all of the PDI files associated with the document referenced by that record. When it completes this operation, the newly built database is available for searching. If you cleared the Unattended database creation/update option in the Database options of User Options, PlanetPress Search prompts you for confirmation to continue if it encounters an error.

Updating a Search Database from PlanetPress Workflow

You can configure PlanetPress Image to automatically update an existing search database when it executes a document. If a record for the document already exists in the database, PlanetPress Image adds the index information to the database. If the document does not yet exist in the database, PlanetPress Image adds a new record for the document along with the index information for the document, to the database. This is useful when you want to eliminate the need to refresh or rebuild the database from within PlanetPress Search. Consult the **PlanetPress Workflow Tools User Guide** for more information on this feature.

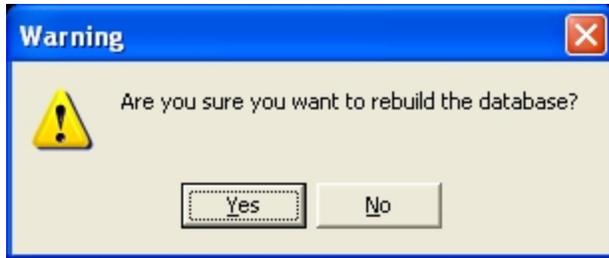
Rebuild the Contents of a Database

This procedure describes how to rebuild the contents of an existing database. You rebuild a database to ensure it accurately reflects the current state of the archive folders it references. You refresh a database if the only change in any of the archive folders is that more files have been added since the previous rebuild or refresh. See ["Refresh the Contents of a Database" \(page 25\)](#).

If you want to modify the set of archive folders the database uses, see [Build the Contents of a Database for the First Time](#).

To rebuild the contents of a database:

- Load one of the search profiles that reference the database you want to rebuild. See ["Load a Search Profile" \(page 26\)](#). The search profile you load must permit rebuilds of its database. In a network installation, it is common for the administrator to control database updates. See ["Database Considerations in a Network Installation" \(page 42\)](#).
- If necessary, choose **Options | User Options**, click **Databaseoptions**, and adjust the settings for the database. See ["Set User Options" \(page 15\)](#).
- In PlanetPress Search, choose **Options | RebuildDatabase**. PlanetPress Search prompts you to confirm the rebuild.



4. Click **Yes** to confirm.

PlanetPress Search populates each record in the database with the information from all of the PDI files associated with the document referenced by that record. When it completes this operation, the newly rebuilt database is available for searching.

Refresh the Contents of a Database

The procedure here describes how to refresh a database from PlanetPress Search.

A refresh of a database can only add information on new files added to archive folders since the last refresh or rebuild of the database. It cannot remove information from the database and thus cannot reflect deletions of, or modifications made to, PDFs already included in the database. For example, if you delete a PDF file from the archive folder and then refresh the database, the entries for that PDF remain in the database, and can appear in search results, even though their associated PDF file is no longer available for viewing or printing.

If you want to be certain that the database reflects the current state of the archive folders it references, you should rebuild the database. See ["Rebuild the Contents of a Database" \(page 24\)](#).

You can clear the **Only search files created since the last refresh** option in the Search Folders dialog box to have PlanetPress read only those PDI files whose creation date is more recent than the date of the last refresh of this database. This reduces the time required to refresh the database, particularly when only a few PDI files have changed since the last refresh.

You can automatically refresh a database when you load it in PlanetPress Search. See ["Set User Options" \(page 15\)](#), and in particular, the Refresh databases option in the Database options. The LastUpdate entry in the search profile records the date of the last refresh or rebuild of the database.

To refresh a database from PlanetPress Search:

1. If necessary, load one of the search profiles that reference the database you want to refresh. The search profile you load must permit database refreshes and rebuilds. In a network installation, it is common to restrict permission to update databases to the database administrator. See ["Database Considerations in a Network Installation" \(page 42\)](#).
2. In PlanetPress Search, choose **Options | RefreshDatabase**.
PlanetPress Search refreshes the database.

Updating a Search Database: Refresh vs. Rebuild

If the contents of an archive folder change, you must either refresh or rebuild the search databases that reference those archive folders to make the changes available in PlanetPress Search.

A refresh of a database can only add information on new files added to archive folders since the last refresh. It cannot remove any information from the database. This means that files deleted from an archive folder continue to appear as entries in the search database, even though the associated PDF source files are no longer available for viewing or printing. In this case you must rebuild the database to have it reflect the current state of the archive folders.

A rebuild of a search database rebuilds it from scratch. Thus when you rebuild a database, you can change the archive folders you want to include in the database.

See ["Refresh the Contents of a Database" \(page 25\)](#) and ["Rebuild the Contents of a Database" \(page 24\)](#) for help refreshing and rebuilding a database.

Save a Search Profile

You can save the currently loaded search profile at any point. It is important to understand that PlanetPress Search also automatically saves the currently loaded search profile both when you switch to a different profile and when you exit PlanetPress Search. Thus for example, if you save a search profile and subsequently modify the user options for that search profile, PlanetPress Search automatically saves those subsequent modifications when you load a different profile or exit PlanetPress Search.

To save the currently loaded search profile:

- Choose **File | Save** to update the contents of the search profile.
Note that you can also choose **File | SaveAs** to save the contents of the search profile to a different file. In this case, PlanetPress Search saves the contents of the currently loaded profile and then immediately loads the contents of the newly saved file. This is one way to create a new profile.

Load a Search Profile

This procedure describes how to switch to another search profile during a PlanetPress Search session. Recall that you can have a single search profile loaded at any one time in PlanetPress Search. When you switch search profiles, PlanetPress Search replaces the currently loaded search profile with the one you select.

To switch search profiles during a PlanetPress Search session:

- Do one of the following:
 - If the search profile to which you want to switch is among the last five loaded, choose **File** and choose that profile in the list of recently used search profiles that appears below the **Save As** menu item.
 - Choose **File | Open**, and in the **Open Profile/Database** dialog box that appears, navigate to the search profile you want to load and click **Open**.
PlanetPress Search replaces the currently loaded search profile with the search profile you selected. The name of newly loaded search profile now appears as the topmost item in the list of recently used search profiles in the PlanetPress Search **File** menu.
Note that if PlanetPress Search cannot establish the connection to the database specified in the profile, it displays an error message. Click **OK** to return to the PlanetPress Search Program window.

Edit a Search Profile

Recall that with the exception of the **ReadOnly** and **ShrinkToFit** entries, all entries in a search profile are either set through the PlanetPress Search user interface or maintained automatically by PlanetPress Search. Unless you need to edit one of these two entries, or for some reason cannot set an entry to the value you want through the user interface (for example, if you need to customize the connection string set in the DatabaseDirectory entry), it is recommended that you make modifications through the PlanetPress Search user interface.

To edit a search profile:

1. Verify that the search profile you want to edit is not currently loaded in PlanetPress Search. PlanetPress Search only reads the contents of a search profile when it loads it, and only updates the contents of the currently loaded search profile when it either switches to a new profile during a session or exits completely. Thus, if you open the currently loaded

search profile in a text editor and edit it, PlanetPress Search overwrites those edits when you switch to a new profile or exit PlanetPress Search.

2. Open the search profile in a text editor, make the necessary modifications, save the file and exit the text editor. Note that whether you can save the modified profile depends on the permissions set on the folder and file containing the search profile.

Copy or Rename a Search Profile

The procedures here describe how to copy and rename a search profile.

To copy a search profile:

- Do one of the following:
 - Create a New Search Profile from an Existing One
 - In Windows, navigate to the search profile, copy it, and then paste it into the new location.

To rename a search profile:

- In Windows, navigate to the search profile and rename it.

Delete a Search Profile

This procedure describes how to delete a search profile from Windows; you cannot delete a search profile from PlanetPress Search. Note that deleting a search profile does not delete the database associated with that search profile. See "[Delete a Database](#)" (page 27).

To delete a search profile:

1. Verify that the search profile is not currently loaded in PlanetPress Search. If the search profile you delete is loaded in PlanetPress Search at the time you delete it, it will reappear when you load a different profile in PlanetPress Search, or exit PlanetPress Search altogether. PlanetPress Search always writes out the currently loaded search profile when it loads a new profile, or when it exits.
2. In Windows, navigate to the folder containing the search profile and delete the search profile. Recall that a search profile bears the file name extension **.prf**.
Note that whether you can delete the search profile depends on the permissions set on the folder containing it.

Determine the Currently Loaded Search Profile

This procedure describes how to determine which search profile is currently loaded.

To determine the currently loaded search profile:

- Choose **File** and locate the list of recently used search profiles, below the **Save As** menu item. The topmost search profile is the one that is currently loaded.

Delete a Database

You cannot delete a PlanetPress Search database from PlanetPress Search. This procedure describes the general steps required to delete a PlanetPress Search database from outside PlanetPress Search.

You can delete the **contents** of a database by removing all archive folders from its list of archive folders and then rebuilding it.

To delete a PlanetPress Search database:

1. Verify that no search profile references the database you want to delete.
2. Do one of the following:
 - If the database is a Microsoft Access database, in Windows, navigate to the folder containing the database and delete the database file **archives.mdb**. Whether or not Windows can delete the database depends on the permissions set on the database file and the folder that contains it.
 - If the database is an SQL Server database, see the database administrator.

Searching in PlanetPress Search

This chapter explains how to define and launch a search. It also explains what a search result is in PlanetPress Search and the operations you can perform on search results.

Once you have a search profile that references a search database, you are ready to perform a search in PlanetPress Search.

In this section, you learn to:

- "Perform a Search Using a Basic Query" (page n)
- "Perform a Search Using an SQL Query" (page n)
- Change the View on Search Results
- ["Select Search Results" \(page 33\)](#)
- ["View the PDF Associated with a Search Result" \(page 34\)](#)
- ["Create a PDF of Search Result Pages" \(page 34\)](#)
- ["Print PDF Pages Referenced by Search Results" \(page 34\)](#)
- ["Print a Summary of the Search Results List" \(page 35\)](#)
- ["Copy Information from the Results List" \(page 35\)](#)

In addition, you will be able to answer the following questions:

- ["Search" \(page 29\)](#)
- ["What is a search result in PlanetPress Search?"](#)

Search

A search in PlanetPress Search is performed on a search database. See ["Understanding PlanetPress Search" \(page n\)](#).

You can search the index information of a single document (a single record in the search database) or of all documents (all records in the search database). If you search the index information of all documents, you can search only identically named index terms common to all the documents.

PlanetPress Search provides two ways to define the search query it uses to perform a search: Basic and SQL.

Use a Basic query if you are unfamiliar with Structured Query Language (SQL) or find it more convenient to define the query without using SQL. In this case, PlanetPress Search uses the set of search criteria you define to construct the SQL query. See "Perform a Search Using a Basic Query" (page n)

Use an SQL query if you are familiar with SQL. See Perform a Search Using an SQL Query.

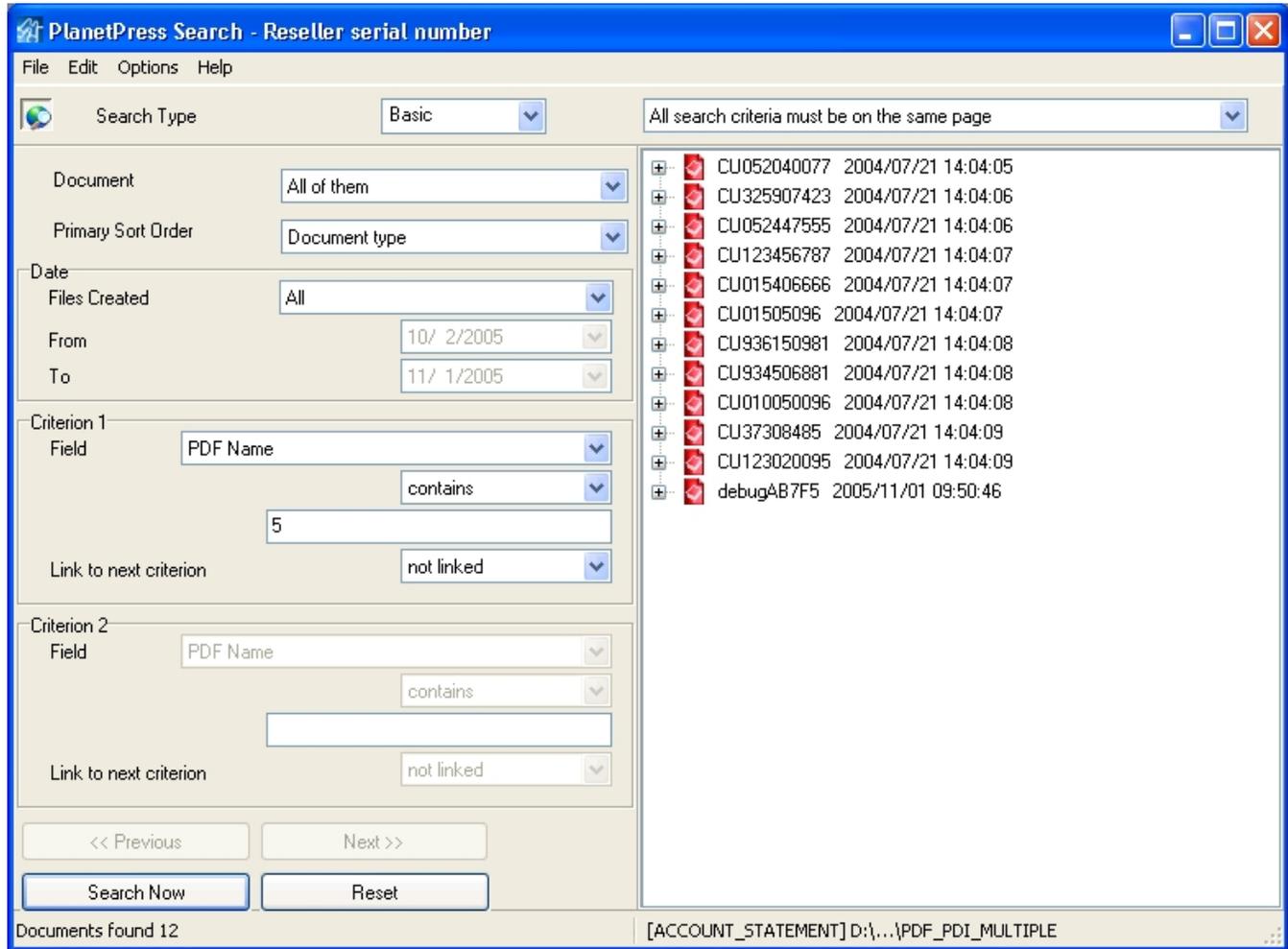
Search Result

What is a search result in PlanetPress Search?

A search result in PlanetPress Search is a pointer to the page of the PDF file that satisfies the search criteria defined for the search. Each search result contains:

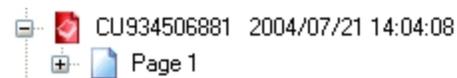
- The name and creation date of the PDF file that contains the search result, as well as the page number on which the search result appears.
- In a Basic search, for each of the index terms in the document, the value of that index term on that page of the PDF. If you search **all** documents in the database, the search result includes only identically named index terms that are common to all the documents. In an SQL search, for each of the index terms referenced by the SQL query, the value of that index term on that page of the PDF. If you search **all** documents in the database, the search result includes only identically named index terms common to all the documents.

PlanetPress Search presents the set of search results as a Results list. The first level of the list represents individual documents in the search results.



A. Results list B. Single search result

If you search on all documents in a database, expand a document in the Results list to display the results for that particular document.



You use the Results area to view, print, or save the PDF pages associated with one or more search results. See ["View the PDF Associated with a Search Result"](#) (page 34), ["Create a PDF of Search Result Pages"](#) (page 34), and ["Print PDF Pages Referenced by Search Results"](#) (page 34).

You can also print a summary of the Results list, or copy information for one or more results from the Results list and paste it into an external application. See ["Print a Summary of the Search Results List"](#) (page 35), and ["Copy Information from the Results List"](#) (page 35).

You can increase the size of the Results area within the PlanetPress Search Program window. See ["Change the View on Search Results"](#) (page 31).

Detailed Directions

The section includes the following procedures:

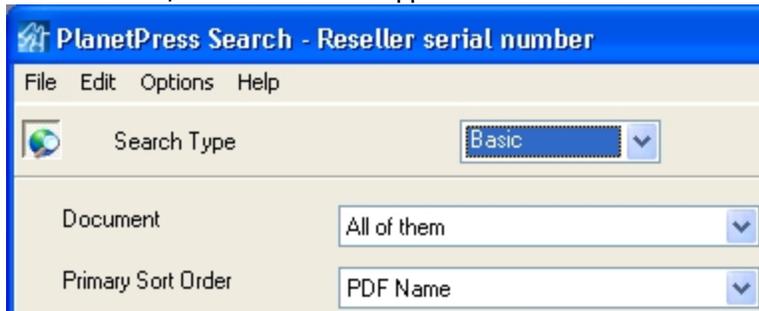
- "Perform a Search Using a Basic Query" (page n)
- "Perform a Search Using an SQL Query" (page n)
- Change the View on Search Results
- ["Select Search Results" \(page 33\)](#)
- ["View the PDF Associated with a Search Result" \(page 34\)](#)
- ["Create a PDF of Search Result Pages" \(page 34\)](#)
- ["Print PDF Pages Referenced by Search Results" \(page 34\)](#)
- ["Print a Summary of the Search Results List" \(page 35\)](#)
- ["Copy Information from the Results List" \(page 35\)](#)

Change the View on Search Results

This procedure describes how to hide the Search Configuration area of the PlanetPress Search Program window (and thereby increase the size of the Results area).

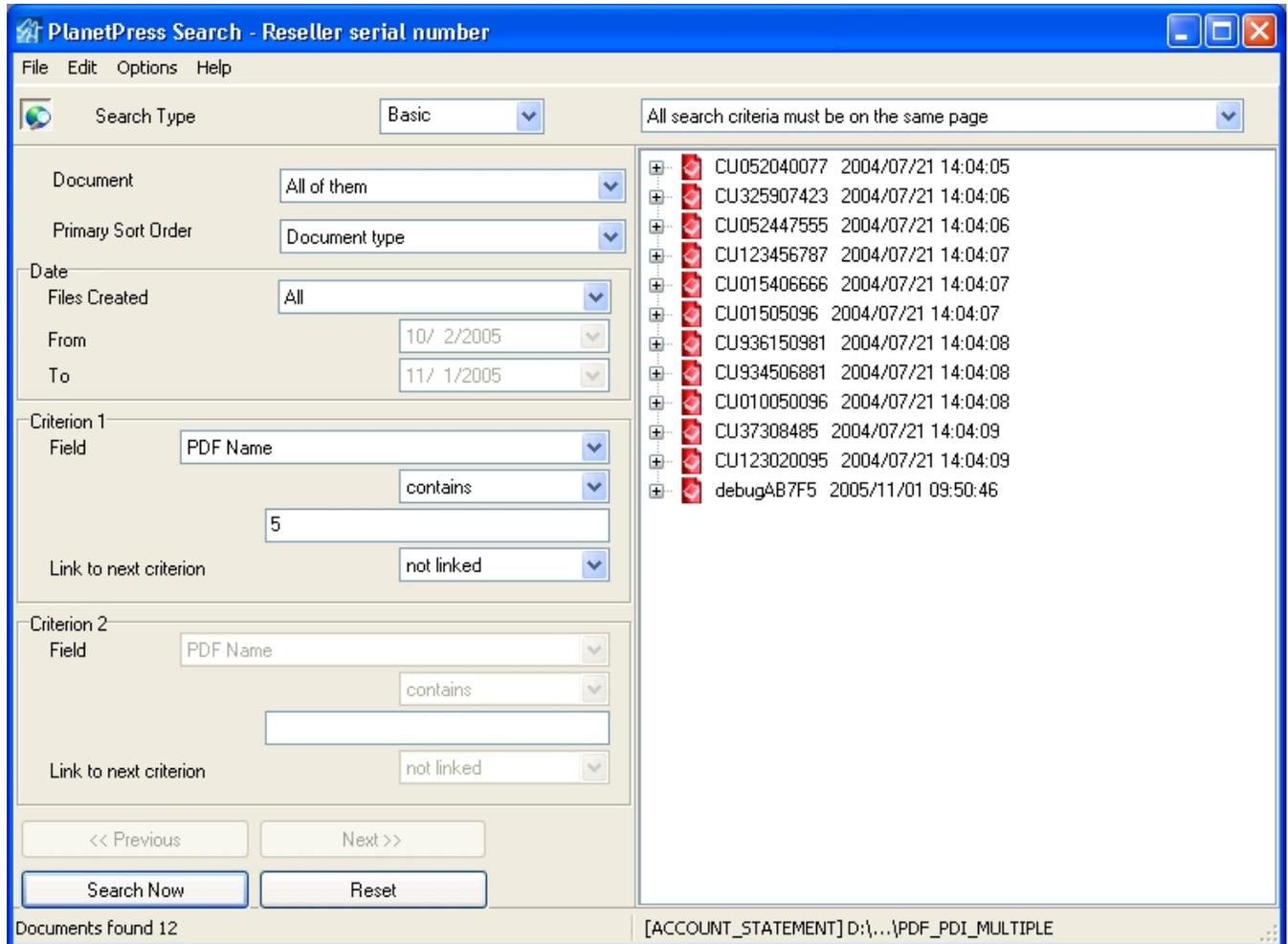
To show or hide the Search Configuration area:

- Click the Show/Hide button in the upper left of the PlanetPress Search Program window.

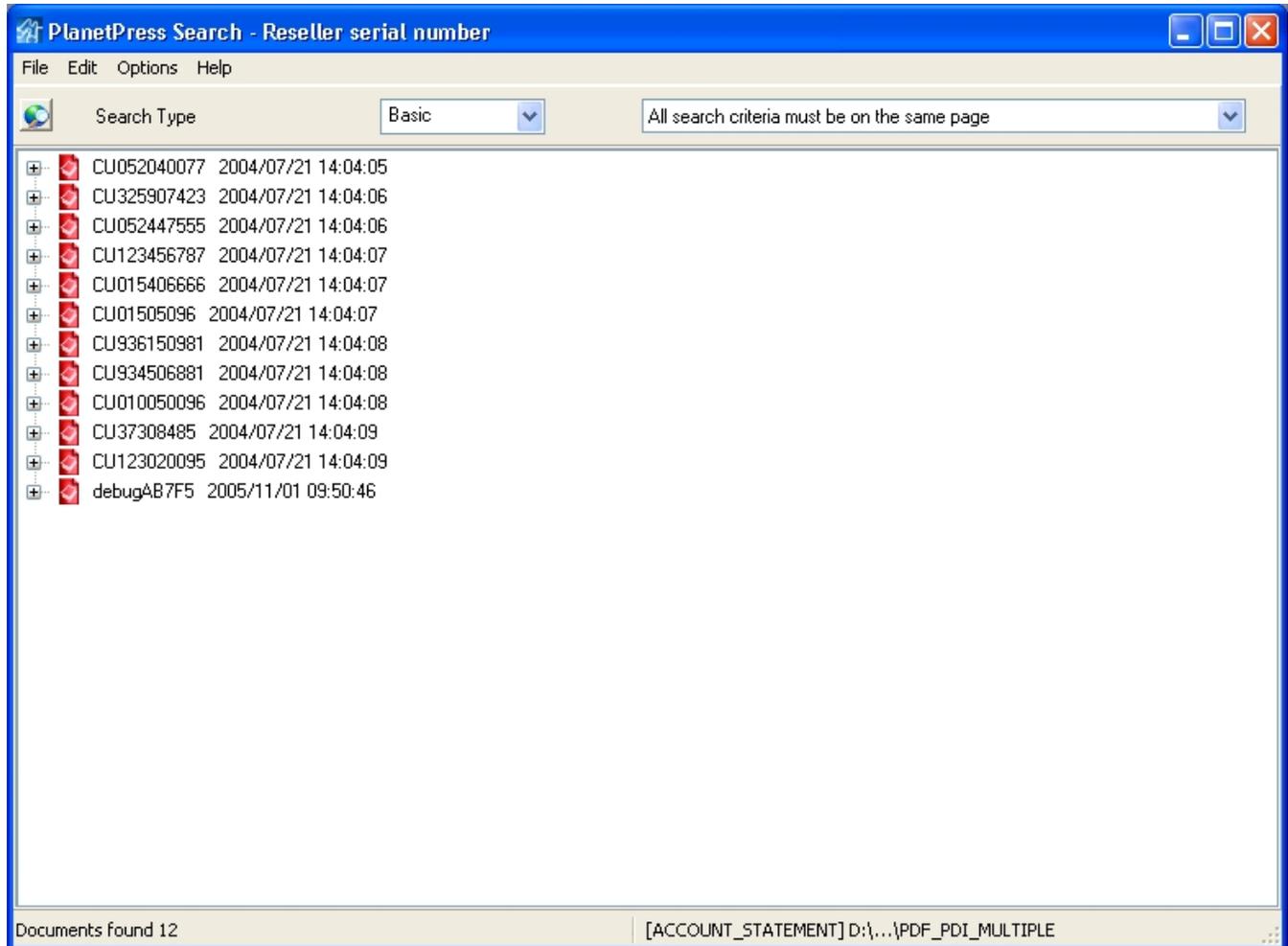


A. Show/Hide button

PlanetPress Search toggles the view to hide or reveal the Search Configuration area.



Search Configuration area revealed



Search Configuration area hidden

Select Search Results

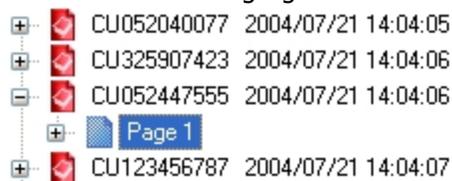
This procedure describes how to select one or more search results in the Results area.

To select one or more search results:

1. If you performed a search on all documents in the database, expand the document in the Results area that you want to select search results from.

PlanetPress Search displays the results below the document in the Results list.

2. In the Results list, click a search result.
PlanetPress Search highlights that search result.



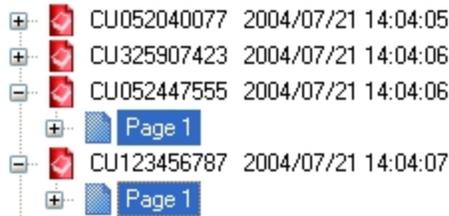
You can add search results to the selection by doing either of the following:

- **CTRL**+click a search result to add it to the selection. **CTRL**+click the same search result a second time to remove it from the selection.
- **SHIFT**+click a search result to add it and all the search results that appear between it and the previously

selected search result.

PlanetPress Search highlights each search result you add.

For example:



View the PDF Associated with a Search Result

This procedure describes how to display the PDF page associated with a search result.

To view the PDF associated with a search result:

- Do one of the following:
 - Double-click the search result.
 - Click the search result and choose **File | Open PDF**.
 - Click the search result and, in the Results list, right-click and choose **OpenPDF**.
PlanetPress Search opens the PDF associated with the search result (if it is not already open), and displays the page referenced by the last search result selected in the Results list.

Create a PDF of Search Result Pages

This procedure describes how to create a PDF of all pages referenced by the Results area. For example, if a search yields 10 results, the PDF you create contains 10 pages.

To create a PDF of search results:

1. Verify the **Multi-page** option in the Search options of the User Options dialog box is set as you require. Recall that the **Multi-page** option determines whether PlanetPress Search includes additional pages with each of the pages referenced in the Results list. See ["Set User Options" \(page 15\)](#).
2. If you performed a search on all documents in the database, expand the document in the Results area that you want to select search results from.
3. Select one of the search results you want to include in the PDF. See ["Select Search Results" \(page 33\)](#).
4. Choose **File | Create PDF** or, in the Results list, right-click and choose **CreatePDF**.
PlanetPress Search displays the **Save New PDF File** dialog box.
5. In the **Save New PDF File** dialog box, specify the path for the PDF file you want to create and click **Save**.
PlanetPress Search creates the new PDF file. If you have the Open PDF after creation option selected (see the Search options described in ["Set User Options" \(page 15\)](#)), Adobe Acrobat Reader displays the newly created PDF.

Things to Remember

- ["Set User Options" \(page 15\)](#)

Print PDF Pages Referenced by Search Results

You can print the PDF page associated with a single search result, the PDF pages associated with selected search results, or the PDF pages associated with all search results.

To print PDF pages referenced by search results:

1. Verify that the **Printer to use** option (in the User Options dialog box, Printing options) is set to the printer you want to use, and that the **Multi-page** option (in the User Options dialog box, Search options) is set as you require. Recall that the **Multi-page** option determines whether PlanetPress Search includes additional pages with each of the pages referenced by the Results list, and, if so, how many. See ["Set User Options" \(page 15\)](#) if necessary.
2. If you performed a search on all documents in the database, expand the document in the Results area that you want to select search results from.
3. Do either of the following:
 - To print all PDF pages referenced by search results in the Results list, first click in the Results list, then choose **File | Print All Pages**, or right-click in the Results list and choose **PrintAllPages**.
 - ["Select Search Results" \(page 33\)](#)
PlanetPress Search opens the PDF associated with each search result, retrieves the page (or pages if the Multi-page option is set) associated with each search result, and sends all the pages it retrieves to the printer selected in the User Options dialog box.

Things to Remember

- ["Set User Options" \(page 15\)](#)

Print a Summary of the Search Results List

This procedure describes how to print a summary of the Results list. The summary contains the search criteria that produced these results, the paths of the archive folders referenced by the database associated with the search profile used to perform the search, and one line per search result. Each search result line contains the name and creation date of the PDF the search result references, and the page number of that PDF on which the search result occurs.

To print a summary of the list of search results:

1. Verify that the **Printer to use** option (in the User Options dialog box, Printing options) is set to the printer you want to use. See ["Set User Options" \(page 15\)](#).
2. If you performed a search on all documents in the database, expand the document in the Results area that you want to select search results from.
3. Click in the **Results** area.
4. Choose **File | PrintResults** or right-click in the Results list and choose **PrintResults**.
PlanetPress Search sends the summary of the Results list to the printer selected in the User Options dialog box.

Things to Remember

- ["Set User Options" \(page 15\)](#)

Copy Information from the Results List

You can copy the information that appears in the Results list to the Windows Clipboard, for subsequent pasting into an external application. For example, you might copy the information and paste it into an email message or Word® document.

You can copy the information for one, some, or all of the search results. When you copy information for a search result, PlanetPress Search copies all the information that appears in the Results list for that search result. You cannot restrict the copy to only part of the information for a search result.

To copy information from the Results list:

1. If you performed a search on all documents in the database, expand the document in the Results area that you want to select search results from.
2. Select one or more search results in the Results list. See ["Select Search Results" \(page 33\)](#) if necessary.
3. Choose **Edit | Copy Row Data** or right-click in the Results list and choose **Copy Row Data**.

PlanetPress Search copies the information for each of the selected results to the Windows Clipboard.

4. In an external application, use the **Paste** command to paste the contents of the Windows Clipboard into that application.



Advanced Concepts

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Search Profile Contents Overview

A search profile contains two categories of information: information about the search database itself and information about searches on that database.

1. Search database information
 - The path of the folder that contains the database (in the case of an Access database) or the connection string to use to connect to the database (in the case of an SQL Server database); the connection string includes the user name and password to use on the SQL database
 - The number of PlanetPress Image archive folders included in the database, the paths for each of these, and whether or not the database includes the contents of any subfolders it finds in those folders
 - The default field size the database uses for index terms
 - The date and time PlanetPress Search last refreshed or rebuilt the database
 - Whether the search profile permits rebuilds and refreshes of its database
 - When to perform an automatic database refresh (the search profile also includes the date PlanetPress Search last loaded the search profile, in order to determine whether a refresh is necessary at the time PlanetPress Search loads the search profile)
 - How to treat errors during database creation, rebuilding, and refreshing
 - Which document, of those in the search database, to display by default when PlanetPress Search loads the search profile
2. Search information
 - The time period to which to constrain the search
 - The case sensitivity of searches
 - Whether or not to automatically open any PDFs you create from search results
 - Whether to include any of the pages that follow the page of the PDF on which a search result occurs, in the search result when you view, print, or save it to a file
 - The printer to use when you print search results
 - The Adobe® Acrobat® Reader® setting that shrinks any oversized pages in the search results to fit the paper size defined in the printer properties, when you print search results

Search Profile Contents Line by Line

The following describes each of the entries in a search profile, line by line as they appear in the search profile, and explains where PlanetPress Search obtains the value associated with that entry. See "[Set User Options](#)" (page 15) for more complete descriptions of any of the options you set through the User Options dialog box.

Note that with the exception of the **ReadOnly** and **ShrinkToFit** entries, all entries are either set through the PlanetPress Search user interface, or maintained automatically by PlanetPress Search. Unless you need to edit one of these two entries (as is the case in a network installation where you edit the ReadOnly entry to prevent database refreshes and rebuilds), or for some reason need to edit the **DatabaseDirectory** entry (for example, to edit the parameters of a connection string), it is recommended that you make modifications through the PlanetPress Search user interface. For more information about network installations, see "[Database Considerations in a Network Installation](#)" (page 42).

Entry:	Description
[General]	Introduces the General section of the search profile.
ReadOnly	Indicates whether the search profile permits rebuilds and refreshes of its search database. A value of 0 indicates the search profile permits rebuilds and refreshes of the database; a value of 1 indicates it does not. When it is set to 1, the Set search folders, Refresh database, and Rebuild database menu items, as well as the User Options Database options are unavailable in the PlanetPress Search user interface. Set automatically by PlanetPress Search, or by a user editing the search profile directly to create a search profile that does not permit rebuilds or refreshes of its databases (for example, in a network installation).
AutoDateFilt	Defines the default date filter for this search profile. Set in User Options, Program startup options, Filter date.
AutoForm	Defines the default document to display when PlanetPress Search loads the search profile. Set in User Options, Program startup options, Select document.
AutoRefresh	Defines the database refresh option. Set in User Options, Database options, Refresh databases.
LastRun	Records the date PlanetPress Search last used this search profile. Automatically maintained by PlanetPress Search.
CaseSensitiveSearch	Defines the case sensitivity of the search. Set in User Options, Search options, Search is case sensitive.
MultiPage	Specifies the number of subsequent pages to include with a search result. Set in User Options, Search options, Multi-page mode.
AutoOpen	Specifies whether to automatically open PDFs you create in PlanetPress Search. Set in User Options, Search options, Open PDF after creation.
PrinterName	Specifies the printer to use with this search profile. Set in User Options, Printing options, Printer to use.
ShrinkToFit	Instructs Adobe Acrobat Reader to shrink any oversize pages that you print, to fit the paper size defined in the printer properties. Never adjusted.
LastUpdate	Records the date and time PlanetPress Search last refreshed or rebuilt the search database associated with this search profile. Automatically maintained by PlanetPress Search.
DefaultFieldSize	Specifies the default field size to use in the search database for each index term. Set in User Options, Database options, Default field size option.
Check Sub-directories	Determines whether PlanetPress Search includes any subfolders it finds in the archive folders, in the search database. Set when you define the archive folders.
DefaultOperator	Determines the operator that appears by default in each search criterion. (0=starts with, 1=ends with, 2=is, 3=is not, 4=contains, 5=does not contain, 6=is greater than, 7=is less than). Automatically set by PlanetPress Search to the last operator used in a query.
Ignore File Date=0	Determines whether PlanetPress Search considers the date of individual PDI files when it refreshes the search database. Set when you define the archive folders.
MDBIndexes=0	Applies only to Access databases, and indicates whether the database uses Access indexes. Set in User Options, Database options, Build field indexes.

Entry:	Description
DatabaseDirectory	<p>Specifies the path of the folder that contains the search database in the case of a Microsoft Access database, or the connection string for the database in the case of an SQL Server database. The connection string includes the user name and password to use when connecting to the database. The password is encrypted before being saved in the search profile.</p> <p>PlanetPress Search prompts you for path to an Access database when you create a new search profile, or attempt to load a search profile that does not yet have a database associated with it. In the case of SQL Server databases, it prompts you for the information from which to construct a connection string when you create a new search profile. In this case, the user name and password for the connection string are set in User Options, Search options, Database access for new profiles.</p>
PathListCount	<p>Records the number of archive folders included in the search database. Automatically set by PlanetPress Search when you create the search database associated with this search profile and define the list of archive folders you want the database to include.</p>
DatabaseTimeout	<p>Specifies the number of seconds PlanetPress Search waits for a response from the database before reporting a connection failure.</p> <p>Set in User Options, Database options, Connection timeout.</p>
[PathList]	<p>Introduces the list of paths for the archive folders included in this search database.</p>
Path1	<p>Specifies a path of one of the archive folders included in the search database. Automatically set by PlanetPress Search when you create the search database associated with this search profile and define the list of archive folders you want the database to include.</p>

Sample Search Profile

The following is a sample search profile for an Access database. The presence of the MDBIndexes entry and the fact that the DatabaseDirectory entry is a path and not a connection string indicate the search profile references an Access database.

[General]

ReadOnly=0

AutoDateFilt=6

AutoForm=

AutoRefresh=0

LastRun=2002/08/29

CaseSensitiveSearch=0

MultiPage=0

AutoOpen=0

PrinterName=Default Printer

ShrinkToFit=1

LastUpdate=2002/09/29 9:58:19 AM

DefaultFieldSize=20

Check Subdirectories=0

DefaultOperator=4

MDBIndexes=0

```
DatabaseDirectory=F:\sales
```

```
PathListCount=1
```

```
DatabaseTimeout=300
```

```
[PathList]
```

```
Path1=F:\sales\letters
```

Sample Connection Strings

The following are sample DatabaseDirectory entries that contain connection strings for an SQL Server database. The first in each pair presents the case where the user name and password on the database is the same user name and password the user uses to log on to their computer and run PlanetPress Search. The second in each pair presents the case where the user name and password on the database is different from the user name and password the user uses to log on to their computer and run PlanetPress Search.

```
DatabaseDirectory=Provider=SQLOLEDB.1;Integrated Security=SSPI;Persist Security Info=False;Data Source=SQLServ01
```

```
DatabaseDirectory=Provider=SQLOLEDB.1;Persist Security Info=False;User ID=bob;Password=qo5F8DgsYTk;Data Source=w2k-websvr
```

Sharing A Profile On The Network

If you are creating a search profile for a network installation, either exit PlanetPress Search or switch to a different search profile (see [Things to Remember](#) for an explanation of why this is necessary), then open the search profile you just created in a text editor such as TextPad and make the following modifications:

- Set the value of the ReadOnly entry to 1 (`ReadOnly=1`) to prevent refreshes and rebuilds of the database through this search profile.
- Adjust the DatabaseDirectory entry if necessary. It is recommended that you use the UNC name (**\\servername\sharename\path\filename**). This eliminates the problem of different users mapping the same drive to different drive letters. For example, use `DatabaseDirectory=\\MyServer\MyDbase` rather than `DatabaseDirectory=G:\MyDbase`. Note that if you do use drive letters, a plus sign (+) in place of the drive letter indicates the database is on the same drive as the search profile that references it. For example:

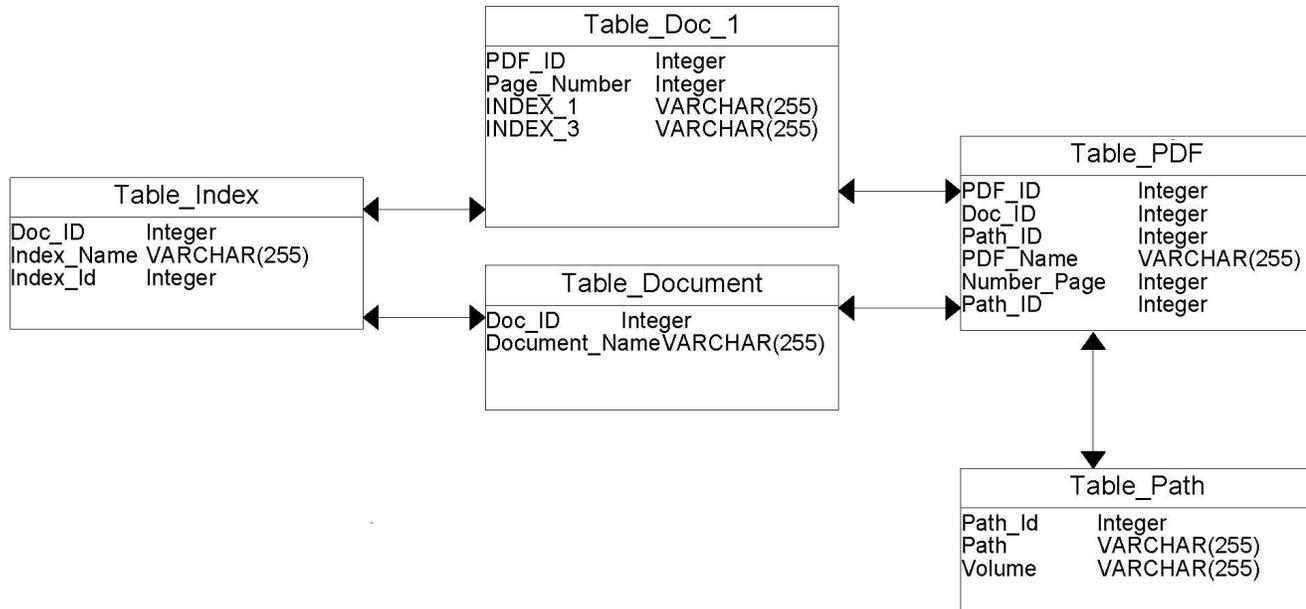
```
DatabaseDirectory=+:\MyDbase.
```

Once you complete the modifications, save the file and exit the text editor. You may also want to review ["Database Considerations in a Network Installation"](#) (page 42) and verify the appropriate permissions are set to ensure the integrity of both the search profile and the database it references.

Database Structure

To produce valid SQL statements you will need to understand the contents of the database tables and their relationships to one another.

For more information submitting an SQL Search Type, see "Perform a Search Using an SQL Query" (page n).



PlanetPress Search database structure.

Tables	Values and Relationships
Table_Doc_#	PlanetPress Search index values (<i>INDEX_#</i>) are associated with the page number (<i>Page_Number</i>) in the PDF (<i>PDF_ID</i>) they appear in. Each of the PlanetPress documents that generate a PDF which PlanetPress Search can query has a unique <i>Table_Doc_#</i> table.
Table_Document	PlanetPress documents are associated to a unique <i>Doc_ID</i> integer. The integer is then included in the <i>Table_Doc_#</i> Document table naming convention generated for the document.
Table_Index	<i>Index_Id</i> integers are associated to their labels (<i>Index_Name</i>) as defined in the PlanetPress documents. The integer is then included in the <i>INDEX_#</i> field naming convention generated for the <i>Table_Doc_#</i> table.
Table_PDF	<i>PDF_ID</i> integers are associated to a <i>Doc_ID</i> integer provided by the <i>Table_Document</i> table, and a <i>Path_ID</i> integer in the <i>Table_Path</i> table.
Table_Path	<i>Path_ID</i> integers are associated to the <i>Path</i> of each of the PDFs that are included in the database.

Command Line Rebuild and Refresh

In PlanetPress Search version 7.3 and higher, it is possible to use the PlanetPress Search executable to refresh and rebuild your database directly from the command line.

The Command

```
ppsearch.exe (-rebuild|-refresh) ["c:\path\to\profile.prf"]
```

Parameters

- ppsearch.exe : Full path to the ppsearch executable, which is normally "C:\Program Files\PlanetPress Suite 7\PlanetPress Search\PPSearch.exe". On 64-bit systems, "Program Files" becomes "Program Files (x86)".

- (-rebuild|-refresh): Mandatory. Use -rebuild to empty the database and rescan all PDFs in the search folders, or -refresh to scan for any new PDFs in the search folders and add them to the database.
- ["c:\path\to\profile.prf"]: Optional. Specifies the search profile to be used. If no profile is specified, the default profile for the currently logged on user (C:\Documents and Settings\lachance\Application Data\Objectif Lune\PlanetPress Suite 7\PlanetPress Search\ppsearch.prf) will be used.

Example Usage

```
ppsearch.exe -rebuild "c:\planetpress\searchprofiles\userinvoices.prf"
```

Notes

- If your database requires a username and password, the credentials set in the PlanetPress Search User Options for the currently logged on user will be used.
- In order to call ppsearch.exe directly without using the full path, you can add this path in your system. [This page](#) describes how to add to your path variable (it is the same in all versions of Windows).

Database Considerations in a Network Installation

In a standalone installation, PlanetPress Search exists on the local machine and the individual user creates the search profiles they require. A standalone configuration is common when a single user performs searches. In most circumstances a standalone configuration offers better performance than a network installation. For optimal performance in a standalone configuration, Access databases are recommended.

In a network installation, PlanetPress Search exists on a network and is accessible to the users on that network. A network installation is common when many users perform searches. SQL Server databases offer the best performance in network installations.

Database Integrity in a Network Installation

In a network installation, it is common to want to restrict permission to refresh and rebuild a search database to the database administrator. For example, if any user can refresh or rebuild a database, and one user launches a search just after another user initiates a rebuild of the database, the first user may unwittingly obtain inaccurate search results.

There are three things an administrator must control to restrict access to the databases PlanetPress Search creates.

1. Search profile permissions on the search database
The ReadOnly entry in a search profile controls whether that profile permits updates on its database. You set this entry to 1 to disable all the rebuild and refresh features available through the PlanetPress Search user interface when that search profile is loaded. You must open the profile in Windows to edit the ReadOnly entry; you cannot modify it through the PlanetPress Search user interface.
2. Windows permissions on search profiles
If users have write permission on the file containing the search profile in Windows, they can edit that profile either through the PlanetPress Search user interface or by opening the file directly.
A user could thus open the file in Windows and edit the ReadOnly entry to permit database updates from that search profile. They could also modify the file from PlanetPress Search, for example, changing the printer PlanetPress Search uses when it prints search results from searches accomplished with that profile. Even in an environment where users are trusted not to edit the ReadOnly entry, it may be preferable to ensure the contents of the search profile do not change unpredictably.
3. Windows permissions on the search database
Even if the ReadOnly entry is set to prevent database updates and the file containing the search profile is read-only, a user could create a new search profile that accesses the database, by creating the profile from scratch, or by loading a

search profile that prevents database updates, saving it out under a different name or in a different folder, and editing the ReadOnly entry to permit database updates. The only way to prevent this is to ensure users cannot write to the database from outside PlanetPress Search.

Restricting Database Access in a Network Installation

The following illustrates how an administrator might implement the control of search database access, and thereby ensure the integrity of the searches performed on that database.

1. The administrator takes responsibility for creating all the search profiles available to users, and for placing those profiles in a folder accessible to all users.
2. The administrator sets the ReadOnly entry of every search profile they create to 1 to prevent updates of the databases those profiles reference.
3. The administrator, in the case of search profiles that reference SQL Server databases, ensures the user name and password set in the connection string permit all users of the search profile to access the database. See ["Set User Options" \(page 15\)](#), and in particular, the Database access for new profiles option in Search options.
4. The administrator sets the necessary database and/or folder permissions to prevent users from writing to the database, and from editing the search profiles that access those databases.
5. The administrator takes responsibility for performing the necessary refreshes and rebuilds of each database. They could create a separate profile that permits database updates and that they use when they need to refresh or rebuild a database, and set up and publish a regular maintenance schedule for the databases so that users know when databases may be undergoing updates.

PDI File Structure

Note that you never edit a PDI file. Examining its contents, however, can be useful in a debugging situation where you want to verify the values it contains are the ones you expect.

The PDI format described here is in the native format PlanetPress Image generates and PlanetPress Search reads. If you are examining a PDI file in XML format, you should not have difficulty locating the information described here, in the XML file.

Each entry in the PDI file has the syntax:

~<name>=<value>

For example, the entry:

~FormName=conference.ps4

has the name **FormName** and the value **conference.ps4**. A PDI file uses the following entries:

Name:	Value:
~SearchDBName	The name you defined in PlanetPress for the database record for the document. This is the name of the record PlanetPress Search creates for this document in any search database it builds that contains the document. If you did not define a name for the database record, PlanetPress Image sets this entry to the value of the ~FormName entry. This is the name you see in the Document box when you set up a search.
~FormName	The name of the converted document (in your PlanetPress Suite Workflow Tool <i>Documents</i> folder) that PlanetPress Image executed to generate this PDI and its associated PDF. PlanetPress Search uses the value of this entry to determine which of the PDF files in a PlanetPress Image archive folder were generated from the same document. If you did not define a name for the database record for this document (see the ~SearchDBName description), it also uses this value as the name of the record it creates for this document in any search database it builds that contains the document. For example, consider two PDI files, report1.pdi and report2.pdi . Neither of these documents had a name defined for their database record during document design in PlanetPress. Both of their FormName entries have the value report.ps4 . In this case, PlanetPress Search would create a database record called report and include the

Name:	Value:
	information from both PDI files in that record.
~ArchiveFile	The name, minus the file name extension, of this PDI file (and its corresponding PDF file). You set this name in your PlanetPress Suite Workflow Tool when you configure the PlanetPress Image output task.
~ArchiveMethod	The type of file (PDF, TIFF, or JPEG) generated by PlanetPress Image. Note that although PlanetPress Image can generate image files of type TIFF and JPEG, you cannot use PlanetPress Search to search an archive of these image files. Consult the <i>PlanetPress Workflow Tool User Guide</i> for further help understanding this feature of PlanetPress Image.
~Time	The time that PlanetPress Image created this PDI file, expressed as hours:minutes:seconds .
~Date	The day that PlanetPress Image created this PDI file, expressed as year/month/day .
~IndexName:<field length>	The name of an index term used in the PDF file. You specify this name when you create the index term in PlanetPress. PlanetPress Image makes a list of the names of all index terms used in the PDF, and places them in the first part of the PDI file. The field length is either the length of the data selection you created in PlanetPress, or the default field size you set in PlanetPress Search, whichever is greater.
~FieldName <values>	The name of an index term, followed by a list of the values this term takes on, on a given page of the PDF file.
~Page	The page number of the PDF file that contains all the FieldName entries above it and below the preceding page number.

Sample PDI File

The following is a sample PDI file, in native format, created when PlanetPress Image executed the document **hr_worksheet.ps4** on October 30, 2003, at 1:58 PM. The name of the PDI file is **hr_worksheet.pdi** and the PDF file it indexes is **hr_worksheet.pdf**. The document defined three index terms: name, department, and years. The PDF file contains three pages.

```

~SearchDBName=hr_worksheet.ps4
~FormName=hr_worksheet.ps4
~ArchiveFile=hr_worksheet
~Time=13:58:02
~Date=2003/10/30
~IndexName:20=name
~IndexName:20=department
~IndexName:20=years
~FieldName=name
Gimbo Downing
~FieldName=department
Accounting
~FieldName=years
1980
1995
2002
~Page=0
~FieldName=name
Debra Bo
~FieldName=department
Accounting
~FieldName=years
1992
1997
2000
~Page=1
~FieldName=name

```

Chu Chin
~FieldName=department
Marketing
~FieldName=years
1993
1998
2001
~Page=2

