



# QUICK START GUIDE

Instantly search  
your computer.



copernic  
**Desktop Search**

## Personalized search experience

Enjoy rich, out-of-the-box extensions with seamless integrations to become a power-user. Choose this selection of extensions:

- Microsoft Office (Word, Excel, PowerPoint, One Note)
- Microsoft Outlook and PST files
- Adobe PDF files
- WordPerfect
- IBM Notes
- Cloud (Google Drive, Microsoft OneDrive, Dropbox)
- Thunderbird & Eudora
- e-Book (.epub)
- Microsoft 365 Outlook
- Image Text Recognition (OCR)
- Microsoft Visio
- Adobe Photoshop Files
- Autodesk AutoCAD



### First time indexing

It requires an initial scan of all your documents

## First time indexing

Copernic Desktop Search will examine all your documents, files and emails located on the PC and create an easy and quick searchable map. CDS will always keep an up-to-date index for you to maximize your search experience.

## Initial scan in progress

At the bottom of the main screen, you can see the progress of the initial scan in the Status Bar. As soon as it is completed, the icon will disappear. It can take time, depending on the type of your documents and how much documents you have. Indexing the content of the files takes more time than indexing only the properties.

Unfortunately, we can not predict the total time of the indexation process. We suggest you to let it run overnight until the process is completely done.

## Five key points to keep in mind!

Indexing one unique large email or file such as .pdf file may sometimes take a long time so please be patient and make sure it is completed.

Select using the appropriate Category tab (*e.g.: files, emails, etc.*) to narrow your search. Extensions may be required.

Use the Operators and search as you type in order to find the files you are searching for (*page 5*).

Supports prefix searches and exact searches in the Search box (*page 4*).

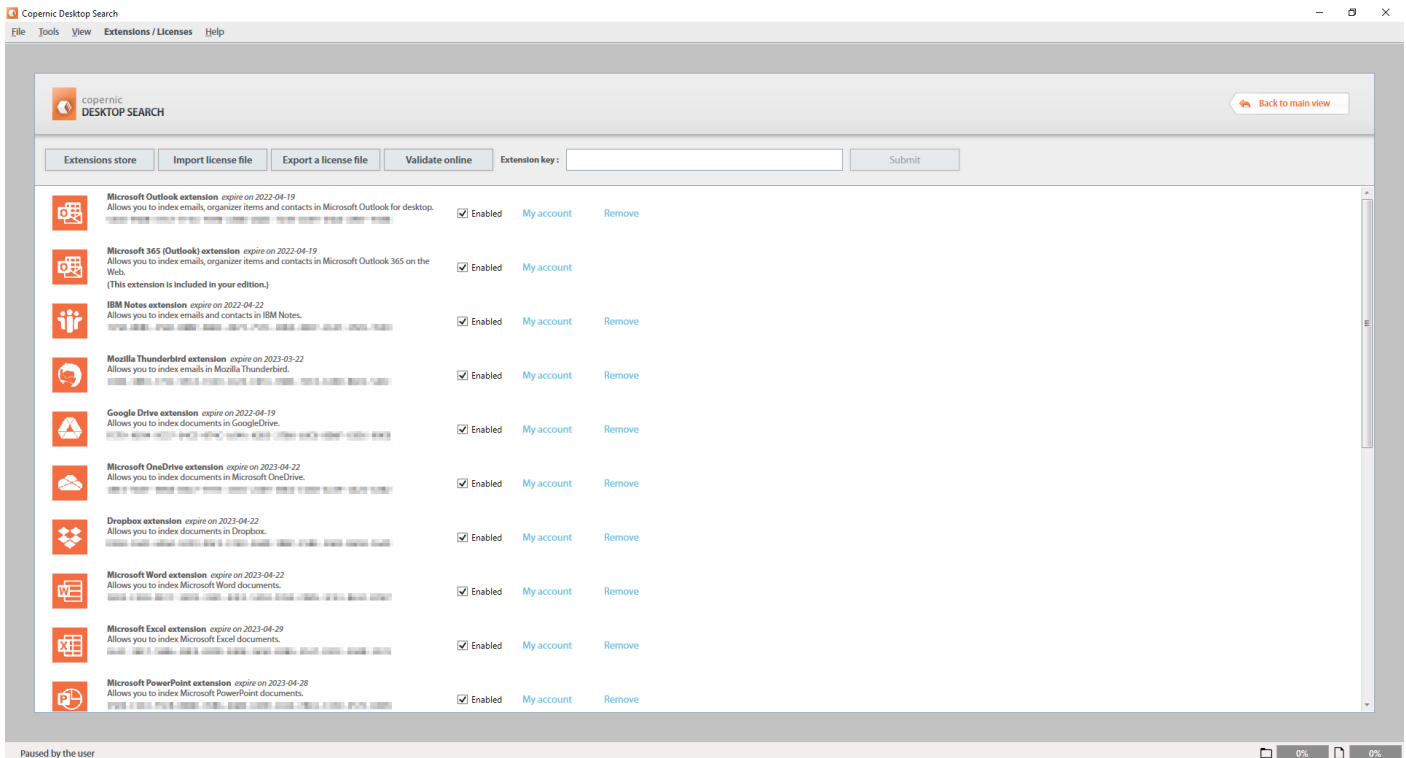
Unable to find what you are looking for?

- Make sure you search in the tab: All
- Type this keyword: @all
- Index status (View > Indexing Status).
- Folders which are indexed.
- File format.
- Folder/file properties to check whether it is hidden.

## Add/Configure your search extensions

To add an extension, you can visit <https://copernic.com/en/desktop/pricing/> to purchase your search extension. We do offer multiple extensions as well as bundles.

You can also go inside Copernic Desktop Search, under Extensions / Licenses menu. In this menu, you will be able to register your extensions as well as manage them.



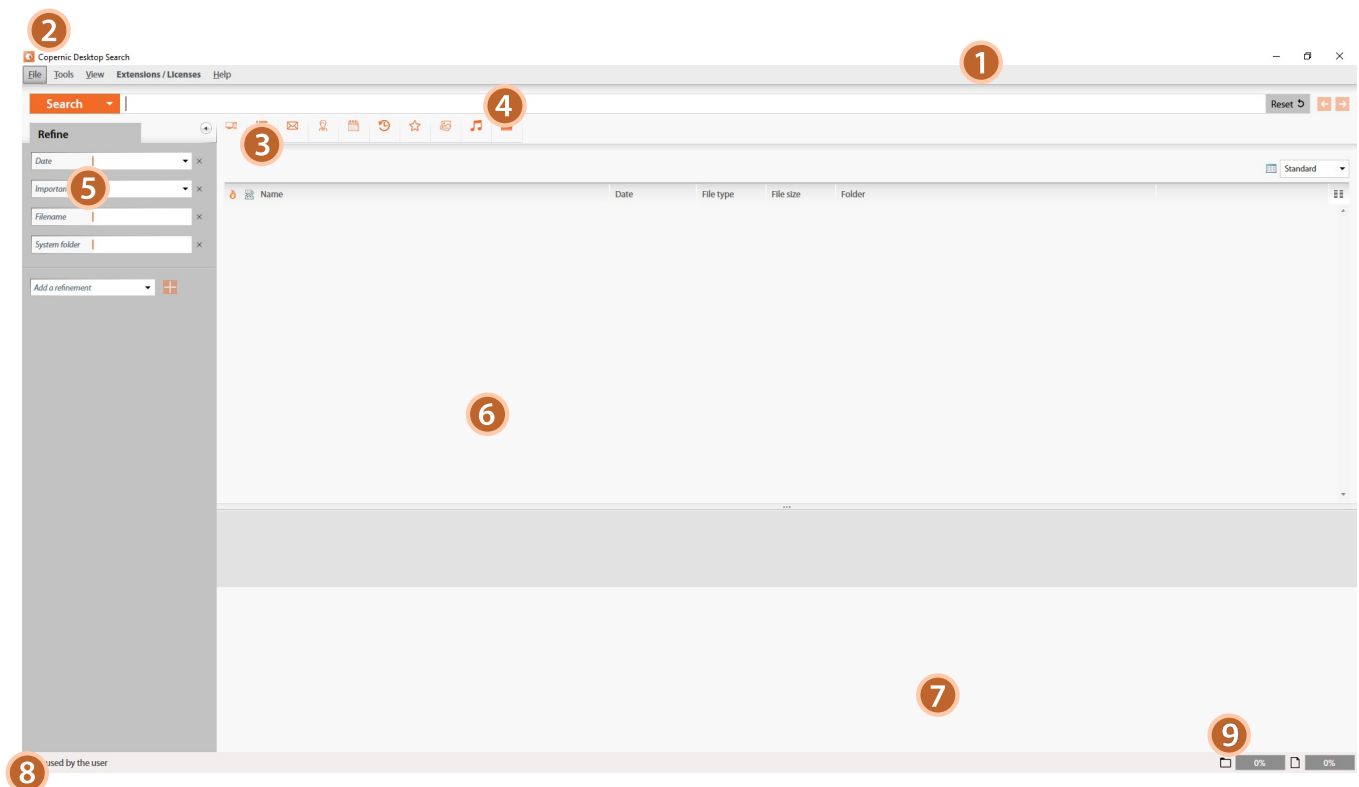
If you buy multiple extensions, you will get a serial number per purchased extension in one license file.

## Connect your cloud services

If you purchased the cloud bundle, you need to authorize Copernic to access your accounts. Inside the Options, go to the Cloud Connections Management tab and connect your account with Copernic under desired cloud (Google Drive, Microsoft 365 (Outlook / OneDrive) and Dropbox) . \*Requires the cloud extension bundle.

## Interface

- 1 The **title bar** displays the name of the software. Use the X icon to minimize CDS to the system tray.
- 2 The **menu** offer useful options and commands to configure and customize CDS as well as help contents.
- 3 The **desktop search category tabs** provides the buttons to switch desktop search categories. The number of matching results in other desktop search categories is displayed by these buttons.
- 4 The **search box** is where you type your keywords.
- 5 The **refine section** is the field for you to type keywords to refine your search.
- 6 The **search results list** is the section of the main window that displays the search results.
- 7 The **preview pane** displays a software-based preview of the selected result.
- 8 **Status bar** indicates the current status of the application.
- 9 The **indexing status** displays the current remaining items to process.



## Search Functionalities

With Copernic Desktop Search, you can search files, emails, email attachments, appointments, tasks, notes, calendar, contacts stored on your PC's hard drive or network drives.

### Files

Click on the Files tab and enter your search string. CDS will find your files by content, name, date or size. Once the requested file is found, a simple click will allow you to preview the file without opening it. By double-clicking on it in the results pane, it will open the file using its original program. CDS gives you the possibility to open the file from the preview pane but also to open the folder where the file is located. For example, a .xls will open the file in Microsoft Excel.

### Email

Click on the Email tab and as soon as you start typing, results will start to appear in the results pane. Type in any word from any email and CDS will find it.

- ✓ **Supported Email Programs\***  
Microsoft Outlook®, Microsoft 365 Outlook® account (cloud base), Mozilla Thunderbird™, IBM Notes®, Eudora®
- ✓ **E-mail Archives**  
Messages contained in .PST files are indexed when the file is opened in Microsoft Outlook® or opening the file in CDS options. After you loaded a .PST file in Outlook®, it is not indexed by default. You need to enable the indexation in CDS (*Tools > Options... > Emails & Organizer*).  
To open a PST file directly in CDS, uses the « Add PST file » button under (*Tools > Options... > Emails & Organizer*).  
**YOU CANNOT HAVE A PST FILE OPENED AT THE SAME TIME IN OUTLOOK AND CDS**
- ✓ **Email Attachments\***  
Use the preview pane along with the refine criteria to find the attachment. Attachments can be found from the files or the emails tab which allows to open the email and email attachment from the preview pane.

\*May require an extension

## Search Commands

### ➤ Keyword searches

Type any word and CDS will start showing documents, files, emails containing that specific word.

### ➤ Prefix searches

Find words beginning with a given prefix.

- Keyword: auto
- Results found: automobile, automatic, etc.

### ➤ Suffix searches Not available

### ➤ Boolean searches

Build searches using **And**, **Or** and **Not**. Use the **AND** operator to search for documents in which all the terms joined with the **AND** operator are present. Use the **OR** operator to search for documents in which at least one of the search terms joined with the OR operator is present. Use the **NOT** operator to ignore documents that contain the specified words. The **NOT** operator helps you narrow your search.

### ➤ Exact match searches

Find documents that contain the whole word or the exact phrase.

- Keyword: "auto"
- Results found: auto, Auto or its plural autos

Operator	Usage	Exemple	Result
AND (default)	Finds documents that contain all the specified words.	business <b>AND</b> meeting	Find documents that contain both "business" and "meeting".
OR	Finds documents that contain at least one of the specified words.	meeting <b>OR</b> appointment	Find documents that include either one of the two terms or both.
NOT	Excludes the documents that contain the specified word.	meeting <b>NOT</b> appointment	Find the documents that contain the word "meeting" if they do not contain the word "appointment".

## Search Terms

Search term	Example	Description
NEAR	Copernic NEAR Desktop	Copernic Desktop Search will find the documents that contain the words "Copernic" and "Desktop" provided they are at most 10 words apart.
"..."	"challenge"	Copernic Desktop Search will find documents that contain the exact word "challenge".
(...)	(America OR Europe) AND Maps	Copernic Desktop Search will first process the "America or Europe" sub-query to find all documents that include either one of the two terms or both.
(...)	(America OR Europe) AND Maps	Copernic Desktop Search will first process the "America or Europe" sub-query to find all documents that include either one of the two terms or both.
Wildcard characters	*.txt	Copernic Desktop Search will find all files that contain ".txt" in their file name, such as: "index.txt" or " copernic.txt.xls"
@all	@all	Copernic Desktop Search will find all indexed documents

## Options

*Copernic Desktop Search offers a wide variety of configurable options which can be accessed from the menu bar :*

### Interface

#### ➤ Show or hide the **Preview pane**

CDS offers a convenient Preview pane to analyze a result's relevancy or cut and paste a selection.

#### ➤ To show the **Preview pane**

In the View menu, point to Preview pane, and then click Right or Bottom.

#### ➤ To hide the **Preview pane**

In the View menu, point to Preview pane, and then uncheck Show results in preview pane.

#### ➤ Highlight search results

Copernic Desktop Search can highlight your keywords in the search results list and the Preview pane.

In the View menu, select Highlight Keywords.

### Emails & Organizer\*

You can search the contents of your emails and their attachments. In the Options window, the **Emails tab** displays the email folders that can be indexed. You can index the entire mailbox, or only part of it.

#### ➤ To Index the Entire Mailbox

1. *In the Tools menu, click Options.*
2. *Select the Emails & Organizer tab.*
3. *Click the first level of the tree structure (subfolders will be indexed automatically).*
4. *Click OK.*

#### ➤ To Index Part of the Mailbox or a Specific Email Folder

1. *In the Tools menu, click Options.*
2. *Select the Emails & Organizer tab.*
3. *Select the checkbox of each folder individually. Remember that subfolders will be indexed automatically.*
4. *Click OK.*

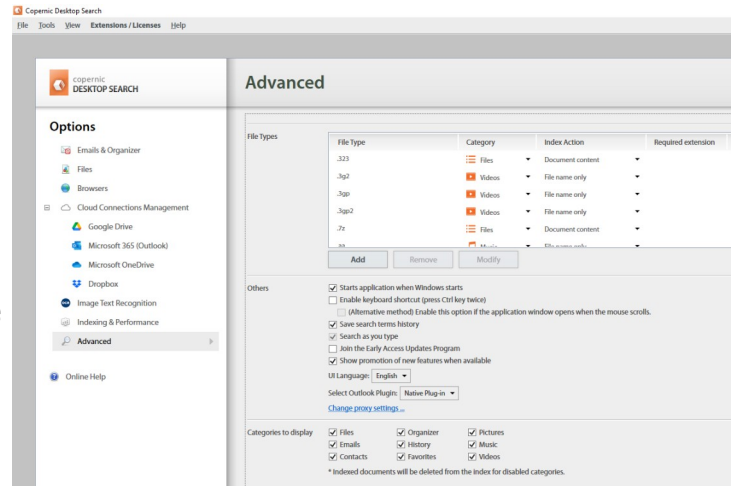
Go to Tools > *Update Index - Emails* to force the immediate index update of targeted folders in the Emails tab category.



### Files \*

CDS indexes files (documents, pictures, music and video) that are stored on your computer, and on network drives or specific folders. Folders can be added, excluded or removed, and targeted file types can be easily modified.

In the Options window, the Files tab displays the list of folders to index (colored icons), and those to exclude (uncolored icons). The first part of the list indicates the name or complete path to each folder to index and the types of files to index (documents, music, pictures and/or videos), under the File Types to Index column. The lower part of the list displays folders to exclude. As excluded folders are never indexed, the File types column displays None for each specified folder.



#### ➤ To add a drive or folder

1. In the Tools menu, click **Options**.
2. Select the **Files** tab.
3. Click **Add**. A new line will appear at the bottom of the folders list.
4. Click in the text box and type the drive path, if needed, browse to the folder you want to add by clicking on the « ... » button.
5. Click on another folder in the list to save the added folder.
5. Select the type of files to index: Documents, Music, Pictures and/or Videos by clicking on the Category option.
6. Select the scope (Folders and subfolders, Skip Subfolders, Skip all) by clicking on the Index Action option.

Click on the *Back to main* view button to save changes and trigger an index update on added folders.

Index miscellaneous file types: CDS indexes plenty of files type. In the File types to index section, all of the file types that are indexed by CDS are listed by extension. You can add new file types by adding its extension, and specifying the indexing type to add a file extension.

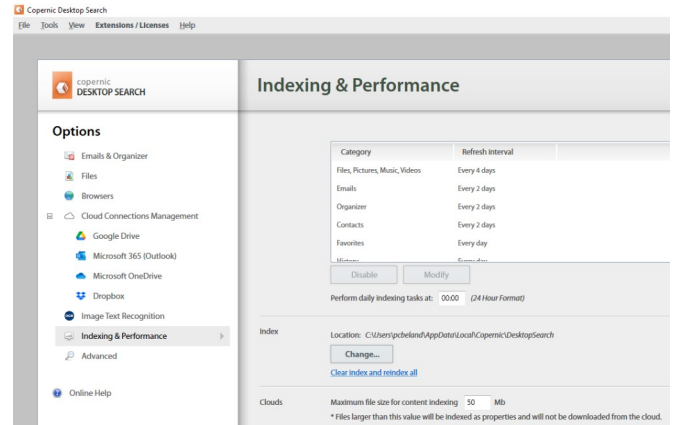
#### ➤ To add a file extension

1. In the Tools menu, click **Options**.
2. Select the **Advanced** tab.
3. Click **Add**. A new file will appear at the bottom of the extensions list.
4. Click in the text box and enter the extension of the new file type to be processed.
5. Click on another extension in the list to save the added folder.
6. Select a category to index: files, music file, picture file, video file. by clicking on the Category option.
7. Select the scope (Document content, File name only) by clicking on the Index Action option.

### Configuration\*

Clouds Maximum File Size for Content Indexing: By default, Copernic Desktop Search does not index the contents of documents on clouds larger than 50 MB. You can modify this limit at your convenience. This option only affect clouds sources (Google Drive, Microsoft OneDrive and Dropbox).

1. In the Tools menu, click Options.
2. Select the Indexing & Performance tab.
4. In the Clouds section under Maximum file size for content indexing text box, specify the maximum size allowed for content indexing.
5. Click OK.



#### ➤ Set automatic index updates

Copernic Desktop Search can perform regular index updates. This means that it will automatically scan your files and email folders to find new or modified items and index or reindex them when necessary. Items that have not changed will NOT be reindexed. Automatic index updates are carried out every day at midnight.

1. In the Tools menu, click Options.
2. Select the Indexing & Performance tab.
3. In the text box in the Schedule section, specify the time format to perform the indexing tasks.
4. Click OK.

#### ➤ Set Custom Schedules for Index Updates


1. In the Tools menu, click Options.
2. Select the Indexing & Performance tab.
3. In the Schedule section, select a Category.
4. Click Modify.
5. Choose the refresh interval.
6. Click OK.



**IMPORTANT:** CDS needs to run to carry out an index update, just minimize it to the system tray. If CDS or the computer is closed at the time of the update, the update will not occur. Upon restarting, CDS will verify whether it missed a scheduled update and if it did, it will carry out the update immediately.


## Optimize Indexing Performance

Copernic Desktop Search constantly monitors your computer's activity to slow down the indexing process when the computer resources are highly used by other programs (or processes). It can also pause the indexing process while you use other programs and restarts indexing after a certain period of inactivity. CDS is built to save your computer's resources.

 **NOTE:** Even though they can be modified, default settings for these three features should ensure optimal results regarding indexing speed without impairing your work and computer resources. Usually, the best time to index is when your computer is idle, that is when you are not using it (not typing nor moving the mouse).


### ➤ To Modify Settings for Indexing Performance to Unrestricted.

1. In the Tools menu, select Indexing Performance.
2. Select Unrestricted (use all computer resources).

 **NOTE:** This setting may slow down your computer during the process but the initial indexing will be performed faster.


### ➤ To Modify Settings for Indexing Performance to Restricted.

1. In the Tools menu, select Indexing Performance.
2. Select Restricted (optimized for low impact).

 **NOTE:** This setting is optimized for daily use of Copernic Desktop Search but with slow indexing performance.

### ➤ To Modify Settings for Indexing Performance to Smart.

1. In the Tools menu, select Indexing Performance.
2. Select Smart (optimized for indexing performance with low impact on system resources).

 **NOTE:** This setting is optimized for daily use of Copernic Desktop Search.

### Standard Support:

Get answers about the Copernic Desktop Search:  
<https://copernic.com/en/resources/>