TARILIO PRO 2.0

SharePoint Online Plugin

User & IT Admin Guide

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About the plugin

The SharePoint Online plugin lets TARILIO index and search documents in your organisation's SharePoint Online sites. You sign in with your own Microsoft 365 work account, choose the sites, and TARILIO indexes their document libraries like any other folder.

- **Read-only.** The plugin can read documents but never changes, moves or deletes anything in SharePoint.
- **Your access only.** It sees only the sites and documents you can already open in SharePoint.
- **What is indexed:** files in the document libraries of the sites you choose, in every file type TARILIO can index. Lists, site pages and OneNote notebooks are not indexed.
- **Requirements:** TARILIO 2.0 or later, Windows 10 or 11, and a Microsoft 365 work or school account with access to SharePoint Online. Personal Microsoft accounts and on-premises SharePoint Server are not supported.

The plugin is sold separately from TARILIO.

Installation

1. Download the plugin zip from the link in your download letter and extract it with 7-Zip (version 26.03 or later) or WinZip, using the password in the letter. Windows' built-in Extract All cannot open it.
2. Close TARILIO, then double-click **TARILIO-SharePoint-Online-<version>.msi** and follow the steps. It places the plugin file in TARILIO's Plugins folder (C:\Program Files\ElectronArt Design Ltd\TARILIO\Plugins).
3. Open TARILIO, click the **Plugins** menu, press **Add…**, select **TARILIO SharePoint Online.esplugin** and click **Open**. SharePoint Online appears in the Plugins list.

To upgrade, run the latest MSI installer to replace the existing version. To uninstall the plugin, go to Windows Settings > Apps and remove "TARILIO SharePoint Online".

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Creating a SharePoint index

1. In TARILIO, choose **Index > New…** and enter a name for the index, e.g. *SharePoint – Legal*.
2. Click the **SharePoint Online** button. The SharePoint Online window opens.
3. Click **Sign in to Microsoft 365…**. Your web browser opens at the Microsoft sign-in page. Sign in with your work account, then return to TARILIO. The window shows *Signed in as* your account and lists the sites you can access.
    - If you have signed in before on this computer, TARILIO uses that sign-in and lists your sites straight away.
    - If you see **Need admin approval**, your organisation requires an administrator to approve TARILIO first. Send your IT department the section *For IT administrators*
4. Select the sites to index. Type in **Filter sites** to narrow a long list; your selection is kept while you filter. Click a selected site again to deselect it.
5. Click **OK**. The source appears in the Create Index window as *SharePoint Online: … (your account)*. You can add folders, files or other SharePoint sources to the same index.
6. Check **Settings…** (file types and maximum file size apply to SharePoint files too), then click **OK** to build the index.

The first build downloads each file once, so it takes longer than indexing local files. As a guide, a site with about 7,000 files takes around 20 minutes; SharePoint may slow down a very fast crawl, and TARILIO paces itself to suit. Downloads are temporary: each file is deleted once it is indexed.

To change the sites later, open **Index > Manage Indexes…**, edit the index and open its SharePoint Online source.

Updating and scheduling

An update downloads only files that have changed since the last update. TARILIO compares each file's SharePoint modified time, keeps unchanged files, adds new and changed ones, and removes files that have been deleted from SharePoint. On our 7,000-file test site, an update with nothing changed takes about 11 seconds.

- **By hand:** Index > Manage Indexes… > select the index > **Update**.
- **On a schedule:** Index > Manage Indexes… > select the index > **Schedule Index…**, as for any other index (see the TARILIO User Guide).

Scheduled updates never open a browser. They use the sign-in saved on this computer, so they run even when TARILIO is closed. If that sign-in has expired or been revoked, the update stops and the index log says so: sign in again as described under *Your sign-in*.

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Searching and viewing

Search a SharePoint index exactly as any other index. Each result shows the document's SharePoint address, e.g. https://contoso.sharepoint.com/sites/Legal/Shared Documents/Contracts/Lease.pdf.

- **Viewer:** TARILIO keeps a copy of each document in the index, so it can show the document with hits highlighted without downloading it again (see *Data held on this computer* below).
- **View in folder (F7):** opens the document's folder in SharePoint in your web browser.
- **Extra fields:** each document also records **Site**, **Library**, **Folder**, **CreatedBy** and **ModifiedBy**. Add them as columns in Results Settings, sort by them, or search them like any other field, e.g. `ModifiedBy:smith`.

Your sign-in

Your sign-in is saved on this computer, encrypted for your Windows account, so you stay signed in between sessions. TARILIO never sees or stores your password; sign-in always happens on Microsoft's own page in your browser.

- **Use a different account:** edit the index, open its SharePoint Online source and click **Use another account…**.
- **Sign in again** (after a password change, or when the log says the sign-in has expired or was revoked): edit the index, open its SharePoint Online source and click **Sign in to Microsoft 365…**.
- **Remove the saved sign-in:** close TARILIO and delete the file **msal_token_cache.bin** in %APPDATA%\TARILIO\PluginData\SharePoint. Leave **sources.json** in the same folder: it records which sites belong to which index.

The saved sign-in belongs to your Windows account. Another Windows user on the same computer must sign in for themselves.

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Troubleshooting

Most problems are shown in the SharePoint Online window or in the index log (Manage Indexes > **View log**).

What you see	What to do
Need admin approval at sign-in	Your organisation must approve TARILIO once. Ask IT to follow *Approving TARILIO for your organisation* below.
Sign-in blocked, or asks for a compliant device	Your organisation's sign-in rules (Conditional Access) apply to TARILIO as to any app. Ask IT.
Please sign in again.	The saved sign-in has expired. Click **Sign in to Microsoft 365…**.
Log: *the Microsoft 365 sign-in … has expired or was revoked*	Edit the index, open its SharePoint Online source and sign in again, then update the index.
A site is missing from the list	New sites can take a while to appear in SharePoint's search. Open the site in SharePoint and click **Follow**: followed sites are always listed. Check that you have access to it.
A file in SharePoint is not in the index	Check the index's Settings: file type filter and maximum file size apply. OneNote notebooks, lists and pages are not indexed.
Log: *could not list the library …* or *could not download …*	That library or file was skipped; the rest of the index is built. Check you can open it in SharePoint, then update the index.
Log: *needs a newer version of TARILIO*	Install TARILIO 2.0 or later.
The first build is slow	Normal for large sites: every file is downloaded once. The log's summary line shows how often SharePoint asked TARILIO to slow down. Later updates are much faster.

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For IT administrators

The plugin signs each user in with their own account (delegated access), reads SharePoint through Microsoft Graph only, and is read-only. Nothing needs registering in your tenant: it uses ElectronArt Design Ltd's multi-tenant TARILIO app, which your organisation approves once.

How it connects

Item	Value
App name in Entra ID	TARILIO (publisher ElectronArt Design Ltd)
Application (client) ID	3ffec639-e3e2-41d6-b20f-5f0f4745f771
App type	Multi-tenant public client: no client secret or certificate
Redirect URI	http://localhost (sign-in in the user's default browser)
Access	Delegated, read-only, Microsoft Graph only
Network endpoints	login.microsoftonline.com, graph.microsoft.com, your *tenant*.sharepoint.com (file downloads)

Permissions requested

All are delegated Microsoft Graph permissions. A delegated permission never gives more than the signed-in user already has: users see only sites and files they can open in SharePoint.

Permission	Why it is needed
User.Read	Shows who is signed in
Sites.Read.All	Lists the sites the user can access and reads their document libraries
Files.Read.All	Downloads files for indexing
openid, profile	Standard sign-in
offline_access	Keeps the user signed in, so scheduled updates run without a browser

Approving TARILIO for your organisation

If your tenant lets users approve apps themselves, each user approves TARILIO at their first sign-in and nothing more is needed. If it does not, users see **Need admin approval** until an administrator approves it once, in either of these ways:

1. Open this link signed in as a Global Administrator, Cloud Application Administrator or Application Administrator, and click **Accept** (replace *your-tenant* with your tenant ID or primary domain, e.g. contoso.onmicrosoft.com): `https://login.microsoftonline.com/your-tenant/adminconsent?client_id=3ffec639-e3e2-41d6-b20f-5f0f4745f771`
2. Or sign in to TARILIO's SharePoint Online window as one of those administrators and tick **Consent on behalf of your organization** before accepting.

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TARILIO then appears in Entra ID under **Enterprise applications**. There you can set **Assignment required** to Yes and assign the users or groups allowed to use it, and see its sign-ins. Your Conditional Access policies apply to TARILIO sign-ins as to any other app.

Data held on the user's computer

- **Sign-in tokens:** in %APPDATA%\TARILIO\PluginData\SharePoint\msal_token_cache.bin, encrypted with Windows DPAPI for that Windows user. No passwords are stored.
- **Source settings:** sources.json in the same folder: account name, tenant ID and the chosen sites. No secrets.
- **The index and document copies:** the index holds the documents' text. By default TARILIO also keeps a copy of each SharePoint document in the index for the viewer, as its original is not on this computer. Users can turn copies off, or encrypt them for their Windows account, in Index Settings; you can enforce either by policy.
- **Temporary downloads:** each file is deleted as soon as it is indexed; leftovers from an interrupted run are removed after a day.

Indexes and permissions

An index contains everything its creator could read when it was built, and TARILIO does not re-check SharePoint permissions at search time. Each user's indexes are private to their Windows account. If you publish an index to others with the **ManagedIndexes** policy, everyone who can search it sees every result in it, so build it with an account whose access matches its audience.

Policies

TARILIO's administrator policies (templates in the TARILIO download's Policy Templates folder) apply to the plugin:

Policy	Effect on the SharePoint plugin
AllowPlugins / AllowedPlugins	Allow or block plugins, or allow only listed ones
AllowDocumentCopies	0 = never keep copies of SharePoint documents in indexes
EncryptDocumentCopies	1 = always encrypt copies for the Windows user
AllowScheduledIndexing	0 = no scheduled updates
MaxFileSizeMB	Largest file indexed
AllowExport	0 = no copying or exporting of results and documents

Removing access

- **One user:** remove them from the TARILIO enterprise app's assigned users (if Assignment required is on) or revoke their sessions. Their next update stops and the log asks them to sign in again.

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- **Everyone:** in Enterprise applications > TARILIO > Properties, set **Enabled for users to sign-in** to No, or delete the app.

Support

Email support@electronart.co.uk with:

- the plugin version (Plugins window) and TARILIO version (Help > About);
- what you did and what you saw, with screenshots if possible;
- the index log, redacted if necessary.

Support articles : https://searchcloudone.com/tarilio-support-articles/

Beta Software Notice

This software is a pre-release version provided for evaluation and testing. It may contain errors, defects, security vulnerabilities, or incomplete features, and its functionality, performance, and reliability are not guaranteed. Please use the software at your own risk. Do not use it with critical, confidential, or irreplaceable data without suitable backups, and do not rely on it for essential business operations. Report any problems or feedback to support@electronart.co.uk
The software may be changed, suspended, or withdrawn at any time

Appendix

This is a draft document issued prior to release of SharePoint Online Plugin 0.3.0 (currently in beta testing). If you notice any errors or omissions, please contact support @ electronart.co.uk please cite the page number and date of the document.

This guide covers SharePoint Online plugin version 0.3.0 with TARILIO 2.0.

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