

# Coveo Enterprise Search 6.0

## Desktop Connector – Administrator Guide

Coveo's Desktop connector allows users to index any file located on desktops and laptops from the list of document types supported by Coveo Enterprise Search (CES). It also provides the ability to index mail archive files (PST & OST) stored on local computers.

Coveo's Search Bar is the client-side application that lets users quickly and easily search the content of the index from their desktop without having to open their browser. It also provides the ability to configure what the desktop connector will index from their desktop.


### Features

The following details the features available in the Desktop connector:

- **Security:** : In order to ensure local files can only be searched by the desktop's user, the connector will apply permissions exclusively to thatp user, ignoring the permissions the user has set to share the files and folders.
- **Live indexing:** The connector uses file monitoring to look for modifications made to the files on the desktops. Modifications are processed as soon as they are detected, thus keeping the index synchronized with the content of the desktop, without requiring the source to be refreshed.
- **Mail archives:** *Microsoft Exchange Personal Folders (.pst)* and *Microsoft Exchange Offline Folders (.ost)* files are from now on referred to as "mail archives" and can optionally be opened by the connector; therefore, their content can be indexed and integrated to Coveo's powerful Email Search functionalities.

### How to Index a Desktop Source

To create a new *Desktop* source, perform the following procedure:


























1. In the Administration Tool, access the **Sources and Collections** page (Index > Sources and Collections).
2. In the **Sources** section, click  **Add** . The **Add Source** page is displayed.
3. Enter the appropriate values:

Field	Description	Example
Name	Any descriptive name.	Desktops
Source Type	The connector used.	Desktop Connector
Addresses	To allow all users: * To specify users: domain\username	*
Port	Port used by the Search Bar to connect to the Desktop connector.	1980
Maximum active clients	Maximum number of simultaneous clients connecting to the connector.	20

Authentication User identity

Leave empty

4. Click  Save .

<b>Name</b>	<input type="text" value="MyPC"/> 
<b>Source Type</b>	 Additional Connector - Desktop Connector
<b>Addresses</b>	<div style="border: 1px solid #ccc; padding: 5px; min-height: 80px;">*</div>  <p>Depends on the additional connector used. One entry per line.</p>
<b>Rating</b>	<input type="text" value="Normal"/> 
<b>Port</b>	<input type="text" value="1980"/> 
<b>Maximum active clients</b>	<input type="text" value="20"/> 
<b>Parameters</b>	 Add Parameter 
<b>Option</b>	<input checked="" type="checkbox"/> Recursive  <input type="checkbox"/> Index the document's metadata  <input type="checkbox"/> Document's addresses are case-sensitive  <input checked="" type="checkbox"/> Generate a cached HTML version of indexed documents  <input type="checkbox"/> Open results with cached version  <input type="checkbox"/> Disable document summarization 
<b>Title Selection Sequence</b>	Use the title extracted by the converter   Automatically detect the title of documents   Use the filename  
<b>Title Metadata Name</b>	<input type="text" value="Title"/> 
<b>Authentication</b>	<input type="text" value="(none)"/>   Add  Edit  Manage user identities

### How to Deploy the Search Bar

The Search Bar can either be deployed manually, or by group-policy.

#### ▶ Manual Deployment

To install the Search Bar manually, you can either send a link to the users or provide them the installation file. Once they install the Search Bar, they can configure the different options, and start using it right away.

Note that it is not possible to restrict the access to certain configuration options of the Search Bar when deploying manually. To disable certain options, please use the Group-Policy deployment method.

### ▶ Group-Policy Deployment

Group-Policy deployment allows to control the installation of the Search Bar on each desktop, and also to control the different options enabled.

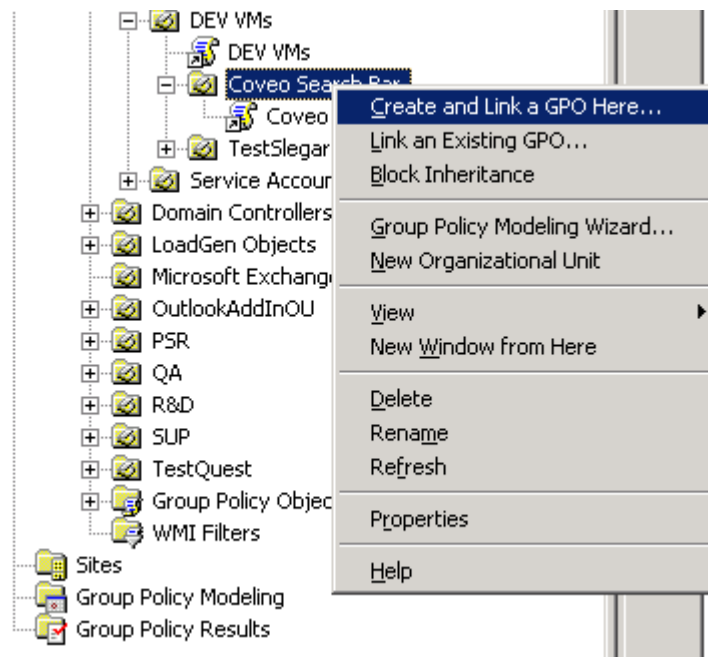
**Important:** When the add-in is configured using GPO, end users cannot modify the configuration.

Before deploying the *Outlook Add-In* using GPO, it is important to have the following:

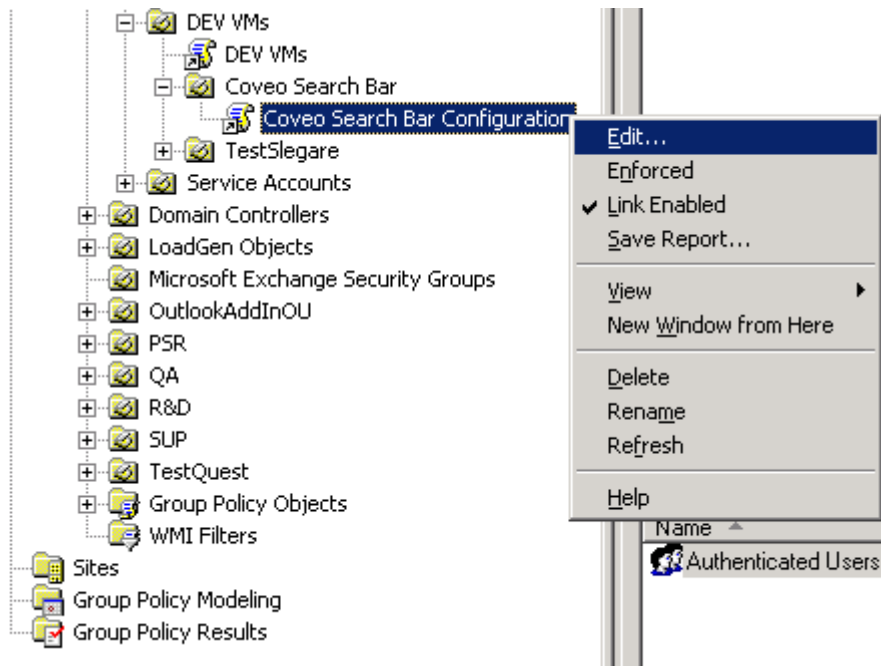
- Appropriate rights to create and edit group policies in the Active Directory (administrator must at least be member of Group Policy Creator Owners)
- Group Policy Management MMC
- Administrative template (*ADM* file)

### How to Create a GPO

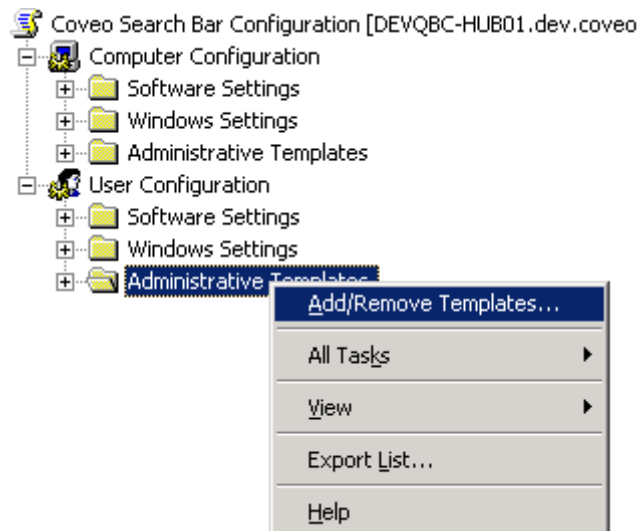
1. To deploy the Coveo Search Bar by group policy, go to **Start Menu -> Administrative Tools -> Group Policy Management**.
2. Next, select the **Organizational Unit** for which to add the group policy.
3. Right click on the existing Group Policy Object (GPO) to which you want to add the administrative template (.adm file) or create a new one by right-clicking on the organizational unit and selecting **Create and Link a GPO Here**.



4. Enter the name for the GPO, for example, "Coveo Search Bar Configuration".
5. Right-click on the newly created GPO (or the existing one) and select **Edit**.



- Under the User Configuration section, right-click on the **Administrative Templates** folder. Select **Add/Remove Templates** and then **Add**.

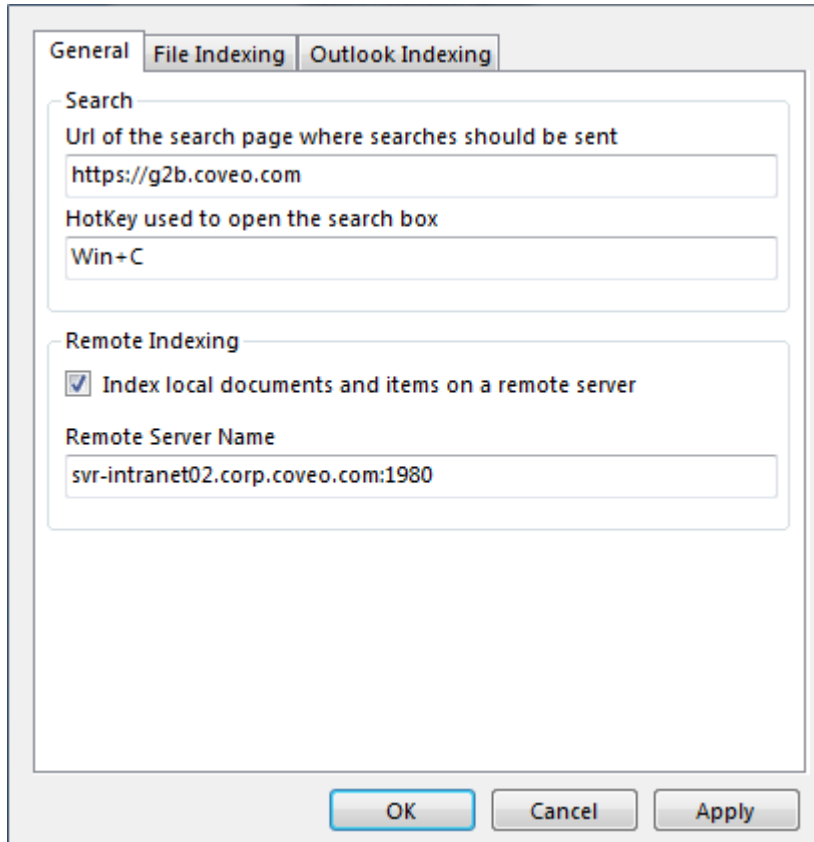


- Next, browse to the location where the file "Coveo SearchBar configuration.adm" is located and select it.
- The GPO template is now created and ready to be configured.

## How to Configure the GPO

There are three (3) categories of settings that can be configured via the GPO: General, File Indexing and Outlook Indexing. Also note that a policy that is “Not configured” or “Disabled” will not be taken into account. Also, setting policies using the GPO will lock the enabled settings on the user’s computer.

The General category corresponds to the General tab options for the Coveo Search Bar.



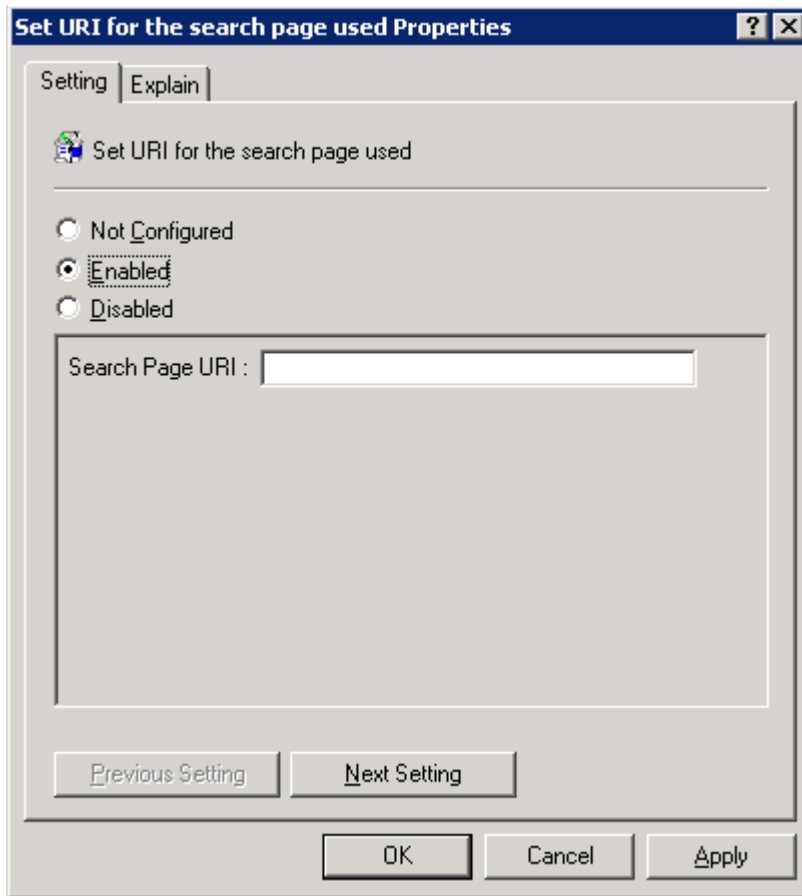
The screenshot shows a configuration dialog box with three tabs: "General", "File Indexing", and "Outlook Indexing". The "General" tab is selected. It contains the following settings:

- Search**
  - Url of the search page where searches should be sent:
  - HotKey used to open the search box:
- Remote Indexing**
  - Index local documents and items on a remote server
  - Remote Server Name:

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

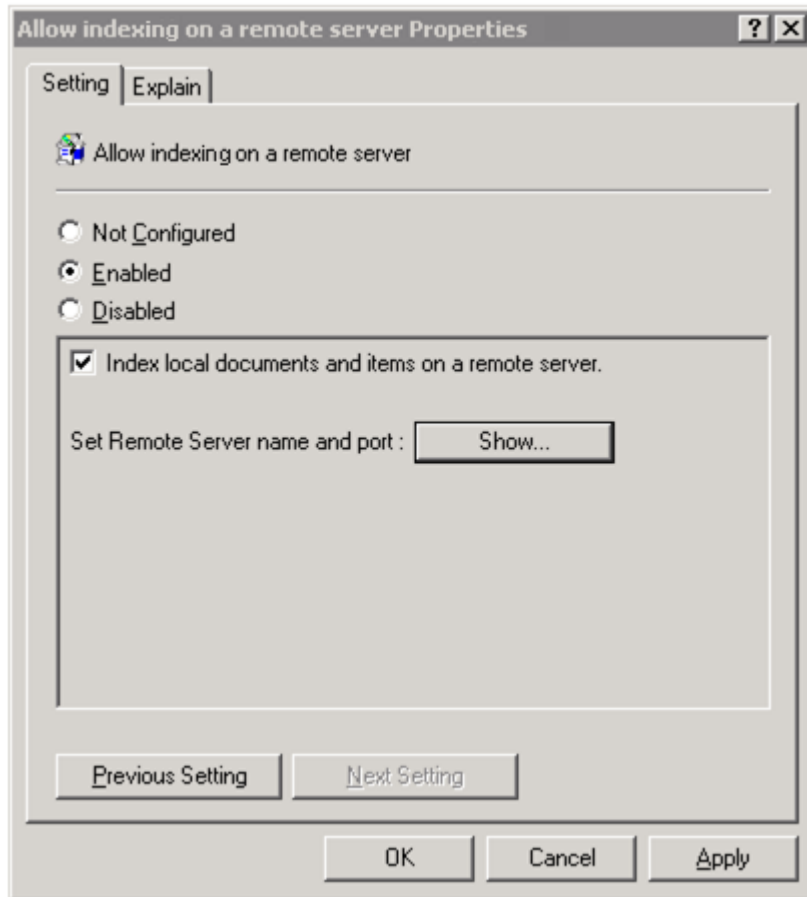
**Set URI for the Search Page Used**

Enter the URL where the Web search UI is deployed, where the queries will be sent. The URI format is not verified by the GPO.



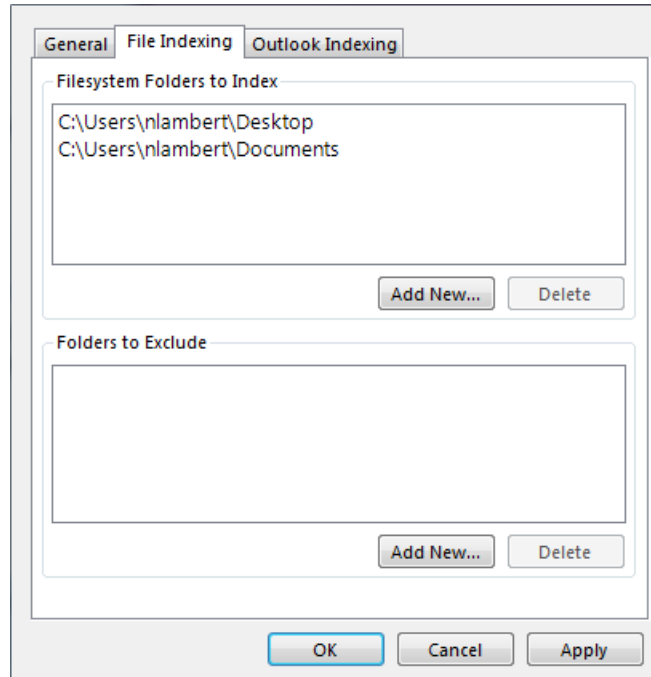
**Allow Indexation on a Remote Desktops**

This policy controls the “Remote Indexing” section in the option panel. When checking the box enabling the indexing on a remote server (remote server being the remote desktops or laptops), at least one server must be specified by clicking on **Show**. The entered server must follow the rule “hostname:port”. If no port is specified, the default 1980 will be used but it is strongly recommended to specify a port.



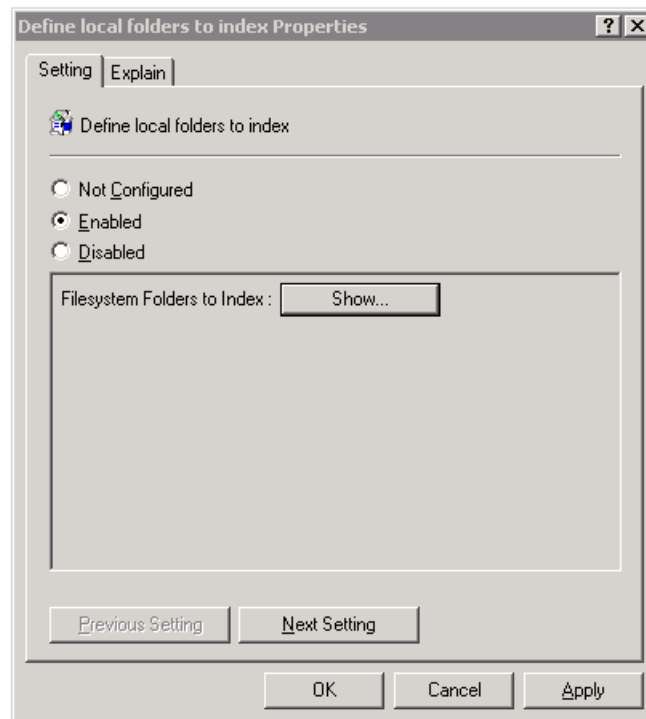
## How to Configure the File Indexing

The file indexing category corresponds to the file indexing tab options for the Coveo Search Bar.



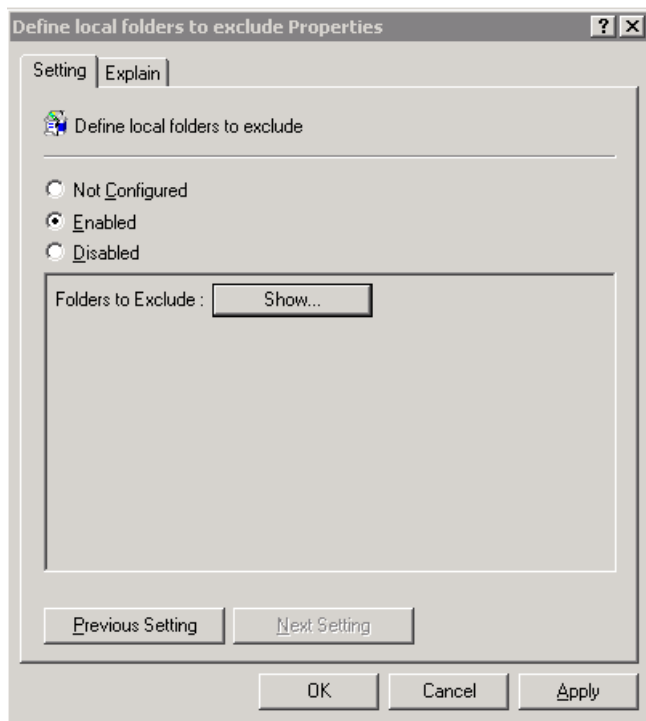
### Define Local Folders to Index

This policy contains a list of the local folders to index. The folder list is viewable and editable by clicking **Show**.



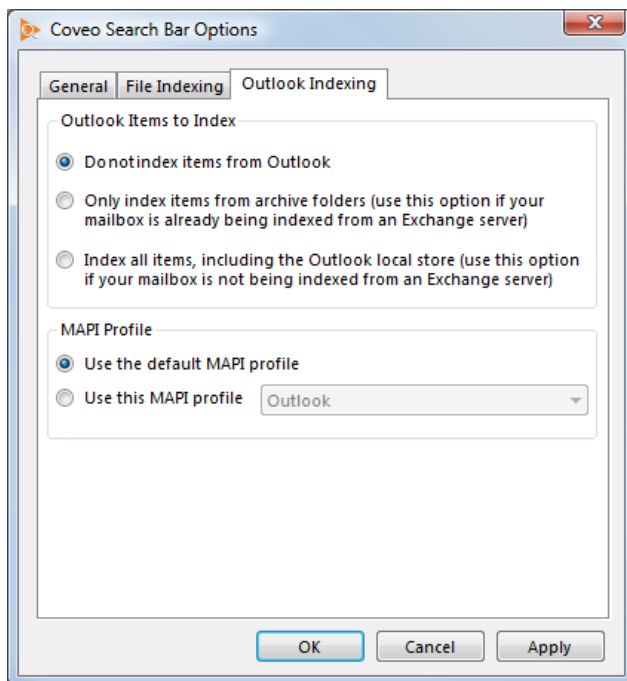
### Define Local Folders to Exclude

This policy contains a list of the local folders **NOT** to index. The folder list is viewable and editable by clicking **Show**.



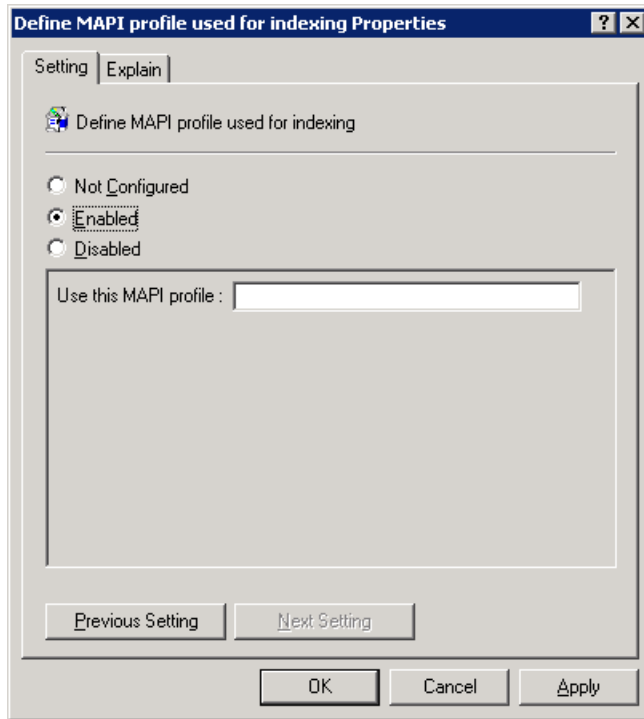
### How to Configure the Outlook Indexing

The Outlook indexing category corresponds to the outlook indexing tab options for the Coveo Search Bar.



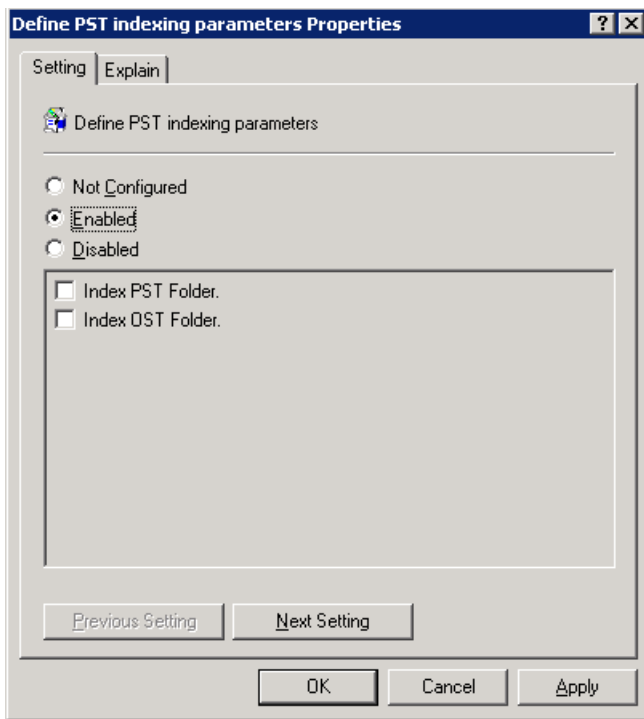
**Define PST Indexing Parameters**

This policy allows to specify if the PST and/or OST files are to be indexed.



**Define MAPI Profile Used for Indexing**

This policy sets the MAPI profile used to index.



## How to Manage the Remote Clients

The Remote Clients page in CES Administration Tool allows to manage the remote clients who use the Desktop connector through the Search Bar. It is possible, among other actions, to force a rebuild, or disable a specific user's desktop. The Remote Clients page is available in the source configuration pages.

Actions ▼
Filter:  ✕

Client	Number of Documents <span style="font-size: 0.8em;">?</span>	Last Connection	Status
<b>Martin Nark (mnark@company.com)</b>			
<input type="checkbox"/> mnark.corp.company.com	28,863	8/28/2009 3:42:08 PM	Refreshing (Idle)
<b>Martin Smith (msmith@company.com)</b>			
<input type="checkbox"/> msmith.corp.company.com	58	8/27/2009 9:32:55 AM	Refreshing (Idle)
<b>Martin J. Russell (mjrussell@company.com)</b>			
<input type="checkbox"/> mjrussell.corp.company.com	138	8/28/2009 3:39:54 PM	Refreshing (Idle)
<input type="checkbox"/> mjrussell-old.corp.company.com	31	8/12/2009 3:59:58 PM	Refreshing (Idle)
<input type="checkbox"/> vm-mjrussell.dev.company.com	181	8/3/2009 8:22:20 PM	Refreshing (Idle)

Select: [All](#), [None](#) Last Refresh: 8/28/2009 3:49:54 PM [\[Refresh\]](#)

Action	Description
Rebuild	Next time desktop connects, it will re-index everything, even if nothing has changed. In the meantime, the documents are still searchable.
Refresh	Only gets or indexes documents that have been modified, renamed or moved.
Delete Documents	Removes all the documents that were indexed from the selected desktop(s). Documents won't be searchable until they are re-indexed.
Delete	Deletes the desktop entry, document count statistics and all related documents.
Disable	Prohibits a desktop from indexing documents.