



Coveo Enterprise Search for Intranet

Installation Guide

Contents

What Is Coveo Enterprise Search for Intranet?	3
Installing Coveo Enterprise Search for Intranet	3
What Are the Platform Requirements?.....	3
How to Run the Installation Kit	4
Performing the Initial Configuration	5
How to Create an Index.....	5
How to Validate the License.....	6
How to Configure Alerts.....	6
How to Start the Console.....	8
Indexing the Content	8
How to Add a Collection	8
How to Add a Source.....	9
How to Manually Index Sources.....	11
How to Define the Permissions of a Collection	11
Performing Search Queries	12
How to Perform a Search	12
How to Configure the Interface Editor	12
Troubleshooting	13
How to Start the Service.....	13
How to Contact Us.....	14

What Is Coveo Enterprise Search for Intranet?

Coveo Enterprise Search for Intranet is an information access solution for intranets designed to provide an effective solution to managing disorganized and hard to access *information silos* - giving users a simple yet powerful single point of access to all information systems in the organization. CES supports intranets such as *Microsoft SharePoint*, *Documentum* and even wikis from *Confluence*. With CES, boundaries on information access are broken, empowering user to find existing knowledge around the organization. The result is increased productivity, employee satisfaction and better return on the investments in your intranet. The following presents the key benefits of this business solution:

- Instant access to the right information independently on where it is stored;
- Easily share information across teams and projects;
- Total cost of ownership significantly lower than competitors with better functionalities;
- Easy deployment and maintenance;
- Secure search that supports the existing access rights and security policies, no need to duplicate security information;
- Aggregate information dispersed over the network, allowing reuse of work and increased productivity.

Installing Coveo Enterprise Search for Intranet

The core technology platform for this application is *Coveo Enterprise Search* (CES). This foundation provides unified, secure search across enterprise emails and email archives.

What Are the Platform Requirements?

Coveo Enterprise Search for Intranet performs adequately with the minimum hardware requirements if it is the only application running on the server. However, if other processes are running in parallel or the query activity is high and mission-critical, a server with the minimum required capacity may not be sufficient. In these cases, *Coveo* recommends the following to achieve the desired performance. The *Coveo* Technical Support team can help determine the appropriate server configurations for the intended application and desired performance levels. Additionally, refer to the [How to Speed up CES](#) help entry of the Administration Tool for a complete list of actions to help keep CES running at maximum speed.

Recommended hardware and software:

- ▶ CPU: dual 2.0 Ghz or better processors
- ▶ RAM: 4 GB or more
- ▶ 150 MB disk space for *Coveo*
Disk space for the search index varies based on the size of the original documents. Rule-of-thumb: allow for 50% of the size of the original documents (e.g., 1 million documents can take ~40GB disk).
- ▶ *Microsoft Windows Server 2003* or *2008*
- ▶ *.NET Framework 3.5*
- ▶ *Microsoft Internet Explorer 6.0* or higher, *Mozilla Firefox 2* or higher
- ▶ Mobile Search: *Windows Mobile 5* or higher with IE mobile, *BlackBerry OS 4* or higher with the browser (optional).

Important: When the installation kit is launched, CES 6.0 automatically installs Internet Information Services (IIS) and *.NET Framework* with all the appropriate options on all supported versions of *Windows* (if they are not already installed). This facilitates the deployment of CES on *Windows Server 2008* as well as on other *Windows* versions.

How to Run the Installation Kit

1. Contact *Coveo Sales* by phone at 1-800-635-5476 (US & Canada) or +1-418-266-1583 (Intl.) to order *Coveo Enterprise Search*. You will be sent a download link and a trial license.
2. Double-click the download link to run the installation kit. The **Welcome** page is displayed.



3. Click . The **License Agreement** page is displayed.
4. Read the license agreement and select **I accept the terms in the license agreement** if you agree with the terms.
5. Click . The **Choose Setup Type** page is displayed.

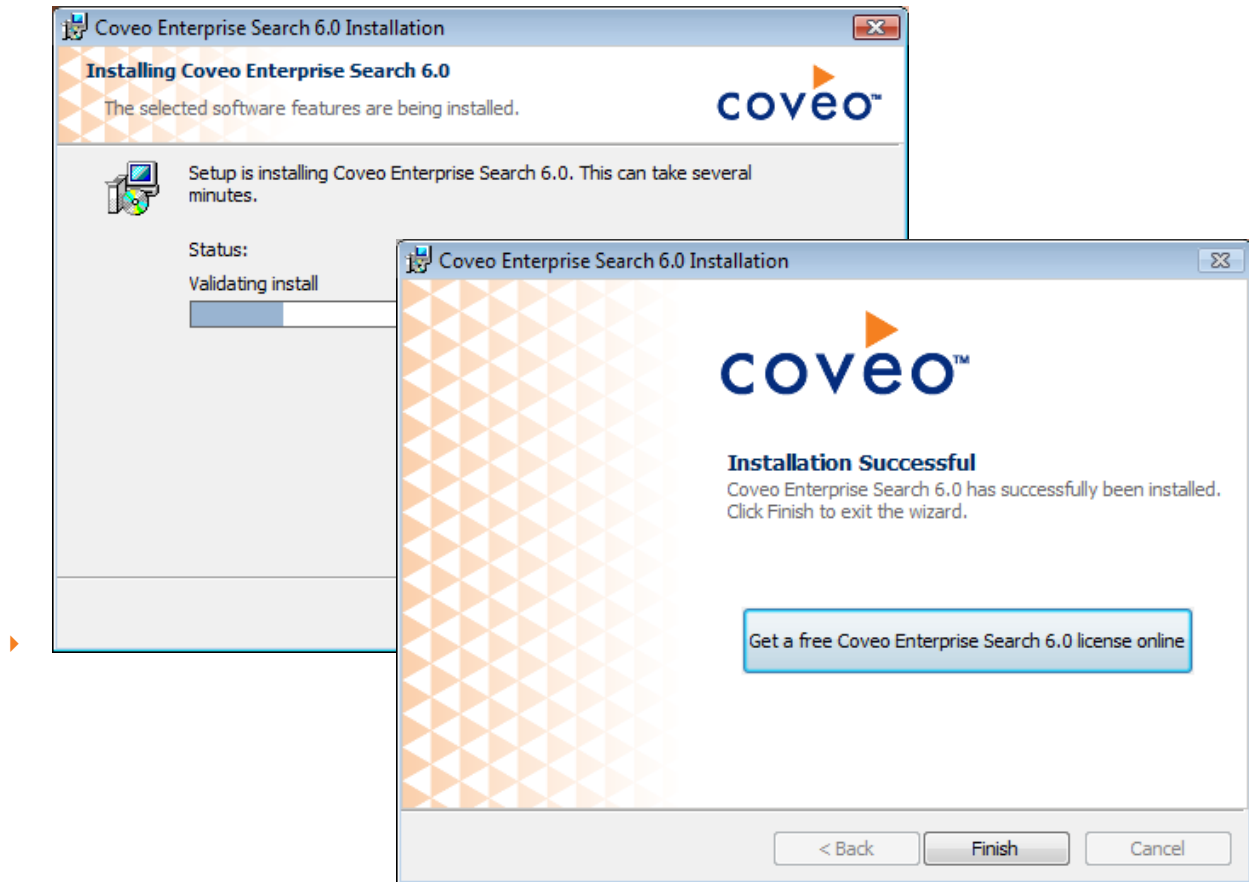


6. Select the **Typical** setup by clicking .
7. In the **Configuration** page, click the **Configure** button corresponding to **Account used to access the files to index**.
8. Select **Use this account** to index local and network files and enter the username, password as well as domain of the appropriate account, then click .

Note: This account is used to index file servers.

9. Click the **Configure** button corresponding to **Web site hosting the interfaces**. **Create a new Web site** is selected by default.
10. Click .
11. Enter the Web site name and port and click .
12. In the **Configuration** page, click .
13. To begin the installation, click .

Note: To modify the installation settings, click .



Note: If this is a new installation (not an upgrade), the Administration Tool is launched in order for the Search Interface and index to be configured.

Performing the Initial Configuration

How to Create an Index

Once *Coveo Enterprise Search for Intranet* is installed, the user must create an index by adding collections and sources. Collections are groups of sources built around a theme (e.g. *Support Emails* and *R&D Emails* collections); whereas, sources are groups of documents from a single repository. The following procedure explains how to create an index with a new installation.

The Administration Tool is automatically launched. If *Coveo Enterprise Search for Intranet* is not running, access the *Windows Start* menu, select **All Programs > Coveo Enterprise Search 6 > Administration Tool**. The **Create index** page is displayed.


By default, the **Create a new index** option is selected in the **Index Creation** section.

1. In the **Index Files Location** section, the index is created by default in the *C:\CES6* folder. To select a new folder, click [\[Modify\]](#).



Index Files Location [\[Modify\]](#)

Index are created at *C:\CES6*.

2. Enter the new index folder and click [→ Apply Changes](#).

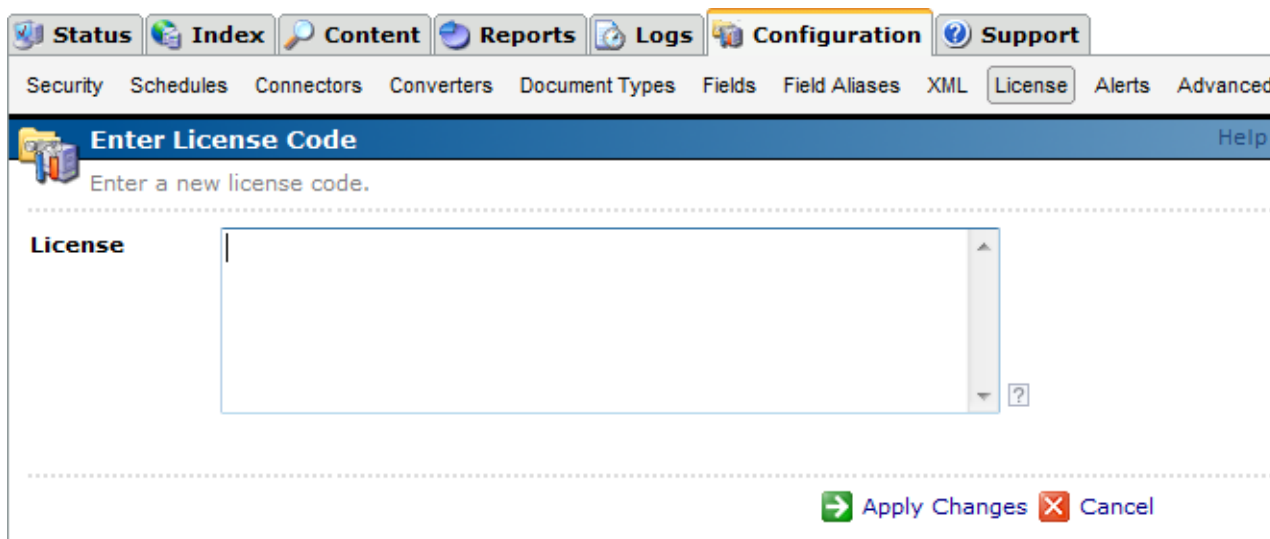
3. In the **Index Content** section, the content indexing is optimized for English-speaking users by default. To add or modify these options, click [\[Modify\]](#).
4. Select the appropriate options and click  [Apply Changes](#).
5. In the **Queries Options** section, click [\[Modify\]](#) in order to modify the options displayed.

Note: Wildcard queries allow the use of wildcard characters. For example, *Search** returns *Searching* and *Searched*.

6. Click  [Apply Changes](#).
7. Click  [Apply Changes and Create Index](#). The **License Page** of the Administration Tool is displayed (to execute the validation instructions, refer to [How to Validate the License](#)).


How to Validate the License

Whether a new index or a conversion of an existing one has been installed, the **Enter License Code** page is displayed.



The screenshot shows the 'Enter License Code' page within the Coveo Administration Tool. The navigation bar at the top includes 'Status', 'Index', 'Content', 'Reports', 'Logs', 'Configuration', and 'Support'. Under 'Configuration', there are sub-tabs for 'Security', 'Schedules', 'Connectors', 'Converters', 'Document Types', 'Fields', 'Field Aliases', 'XML', 'License', 'Alerts', and 'Advanced'. The 'License' tab is active. The main content area has a title bar 'Enter License Code' with a 'Help' link. Below the title bar, there is a text input field labeled 'License' with a placeholder 'Enter a new license code.' and a question mark icon. At the bottom right of the form, there are two buttons: 'Apply Changes' (with a green arrow icon) and 'Cancel' (with a red X icon).

Note: Coveo sends an email entitled **Coveo Enterprise Search License Information** with its attachment—*Coveo Enterprise Search License Code.txt*—to the email address entered in the registration form.

1. Open the *Coveo Enterprise Search License Code.txt* file in *Notepad*.
2. Select ALL the text, copy and paste it in the **License** field.
3. Click  [Apply Changes](#).

How to Configure Alerts

Alerts sent by email allow the administrators of *Coveo Enterprise Search for Intranet* to be notified immediately when a system error occurs. Therefore, they can react quickly and keep written track of errors without having to constantly refer to the console or logs. When alerts are properly configured, an email is sent each time an error or fatal error occurs (depending on the sensitivity level selected in the **Alert when** drop-down list).

1. In the Administration Tool, access the **Alerts** page (Configuration > Alerts).

Alerts

Modifies email alert options.

Alert Setting

Alert when ?

Email Settings

Document limit Alert when the number of documents has reached % of the document limit.

SMTP Server

Sender address ?

Email Settings

Recipient addresses ?
Use semicolons to separate email addresses.

SMTP Server

Subject ?

SMTP Server

Server Address ? Port ?

SMTP Server

Username ?

SMTP Server

Password ?

[Send Test Email](#)

2. Enter the appropriate parameters. For more information, refer to the following table:

Section	Field	Description
Alert Settings	Alert when	Indicates when an alert is sent. Three options exist: <ul style="list-style-type: none"> Never: Disables alerts. An Error Occurs: Indicates that an alert is sent each time an error occurs. A Fatal Error Occurs: Indicates that an alert is sent each time a fatal error occurs. <p>Note: An Error Occurs is a very sensitive setting which sends alerts for non-threatening errors such as invalid configurations (e.g. when an invalid path is entered as source address).</p>
	Sender address	Indicates the address used by <i>Coveo Enterprise Search for Intranet</i> to send the alerts.
	Recipient addresses	Indicates the addresses of all administrators who receive the alerts.
Email Settings	Subject	Indicates the subject of the alerts.
	SMTP Server	Indicates the address of the mail server used to send the alerts (e.g. mail.coveo.com).
	Username	Indicates the username used to access the mail server.
	Password	Indicates the password used to access the mail server.

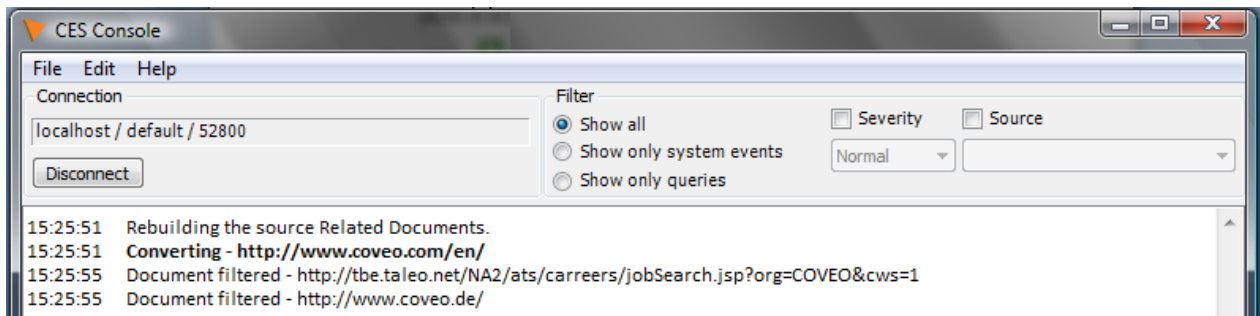
3. To validate the configuration, click [Send Test Email](#) . If the test email is not sent to all recipients within a few minutes, modify the configuration.


4. When the test email is sent to all recipients, click [Apply Changes](#) .

How to Start the Console

The CES Console displays the activities of the *Coveo Enterprise Search for Intranet* service in a separate window as well as useful real-time information such as connection, crawling and indexing operations. Moreover, the Console is a helpful tool used when debugging.

1. Open the *Windows Start* menu.
2. Select **All Programs**.
3. Access the **CES Console** (Coveo Enterprise Search 6 > CES Console).



Note: By default, the Console is automatically connected to the server and instance; however, if it is not connected, select the appropriate parameters from the **Server** and **Instance** drop-down lists, and then click .

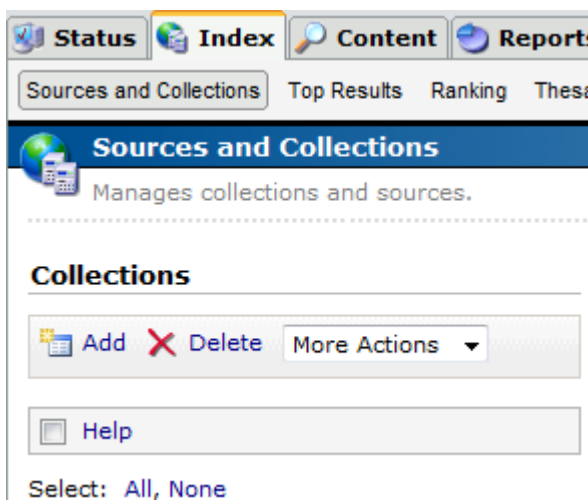
Note: No activity is displayed in the window until settings are modified in *Coveo Enterprise Search for Intranet*, or indexing and querying activities are activated.



Indexing the Content

How to Add a Collection

Collections and sources are subdivisions of the index; collections are groups of sources built around a theme (e.g. *Human Resources* and *R&D* collections), whereas sources are groups of documents from a single repository (e.g. all documents from the *Coveo Web* site). Each collection has its own security permissions which override those of sources, meaning that users can never query the content of a source without having access to its parent collection.

1. In the Administration Tool, access the **Sources and Collections** page (Index > Sources and Collections).




2. In the **Collections** section, click  **Add** . The **Add Collection** section is displayed.
3. In the **Name** field, enter a name to identify the collection.
4. In the **Allowed Users** section, select the security permissions of the collection. For more information about permissions, refer to the following table.
5. Click  **Save** .

Permissions	Description
Everyone	Grants access to all users.
The collection creator	Grants access only to the administrator who has created the collection (this setting is used to test configurations before deploying them).
The following users or groups	Grants access to the users or groups whose accounts are entered in the text box.

Note: To display the sources contained in a collection, click the collection's name.

How to Add a Source



By default, sources can be accessed by all users who have access to the parent collection; however, it is possible to specify additional permissions for all sources. The following details how to add a source:

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. In the **Name** field, enter a name to identify the source.
4. In the **Source Type** drop-down list, select the type of repository to crawl. For more information about source types, refer to the following table:

Type	Description
Local/Network Files	Regroups documents from <i>Windows</i> or <i>Novell</i> file servers. Security permissions are indexed with these sources.
Web Pages	Regroups documents from Web servers (e.g. documents from http://www.coveo.com). Security permissions are not indexed with these sources. However, if Web files are stored locally (i.e. on the same network as CES), it is possible to associate file server permissions with them. Moreover, the properties of the Web connector can be modified.
SharePoint	Regroups documents from <i>SharePoint</i> portals and sites. Security permissions are indexed with these sources. Moreover, the properties of the <i>SharePoint</i> connector can be modified.
Exchange (WebDav)	Regroups documents from <i>Microsoft Exchange</i> servers. Security permissions are indexed with these sources and live indexing is supported. The connector can be customized to only enforce securities found in Active Directory. The WebDav connector can crawl <i>Exchange Server 2003</i> or <i>2007</i> . The connector also supports form authentication. For more information, refer to the Microsoft Exchange Connector documentation.

Exchange (WebServices)	Regroups documents from <i>Microsoft Exchange</i> servers. Security permissions are indexed with these sources and live indexing is supported. The connector can be customized to only enforce securities found in Active Directory. The WebServices connector is only supported by <i>Exchange Server 2007 SP1</i> and up. It is recommended to select this connector to crawl <i>Exchange 2007</i> servers. For more information, refer to the Microsoft Exchange Connector documentation.
Lotus Notes	Regroups documents from <i>Domino</i> servers. Security permissions are indexed with these sources. However, because indexing is conducted through a <i>Lotus Notes</i> client, the client information must be provided. For more information, refer to the Lotus Notes Connector documentation.
Database	Regroups documents from databases. Live indexing and security can be supported depending on the content indexed.
Documentum	Regroups documents from <i>EMC Documentum</i> content servers. Security permissions are indexed with these sources and live indexing is supported. EMC Document content servers version 5.3 and up are supported. For more information, refer to the Documentum Connector documentation.
Opentext Livelink	Regroups content from <i>Open Text Livelink</i> repositories. The connector supports all <i>Open Text Livelink</i> domains and securities, as well as Active Directory users using the <i>directory services</i> add-in provided by <i>Open Text Livelink</i> . To index securities in <i>Open Text Livelink</i> , the <i>Open Text Livelink</i> security provider must be added. The connector can detect security modifications during Live Indexing. For more information, refer to the Open Text Livelink Connector documentation.
Quest Archive Manager	Regroups documents from <i>Quest Archive Manager</i> Security permissions are indexed with these sources and the connector can be customized to only enforce securities found in Active Directory for the mailboxes. Moreover, live indexing is supported. <i>Quest Archive Manager</i> version 4 is supported. For more information, refer to the Quest Archive Manager Connector documentation.
Salesforce	Regroups content from <i>Salesforce</i> repositories. The mapping file specifies which of these types and fields to index, the security permissions for each type, etc. The live indexing feature refreshes the content of the index based on the modification date of the objects on the <i>Salesforce</i> server. If an item is modified, the live indexing feature refreshes the item automatically. For more information, refer to the Salesforce Connector documentation.
Sitecore	Regroups content from <i>Sitecore's</i> Web site. The connector can index security from the <i>Sitecore's</i> permission model and live indexing allows it to periodically query <i>Sitecore</i> for the latest edits. For more information, refer to the Sitecore Connector documentation.
Symantec Enterprise Vault	Regroups documents from <i>Enterprise Vault</i> archives. Security permissions are indexed with these sources and live indexing is supported. <i>Symantec Enterprise Vault</i> version 6, 7, 2007 are currently supported. For more information, refer to the Symantec Enterprise Vault Connector documentation.

- | | |
|---------------|---|
| Manual | Regroups documents which are pushed programmatically using API calls (i.e. documents indexed manually without a crawling application). Security can be indexed with these sources. |
| Exchange MAPI | Regroups documents from <i>Exchange</i> servers. Security permissions are indexed with these sources. For more information, refer to the Microsoft Exchange Connector documentation.

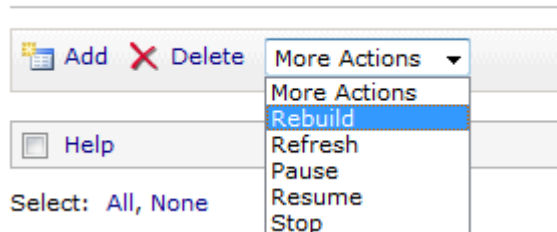
Important: Before adding a source with the <i>MAPI</i> connector, read the following article and make sure the profile is properly configured
http://www.coveo.com/en/Support/articles/How%20To%20-%20CES4-060401-1%20-%20Indexing%20an%20Exchange%20Server%20Source.htm . |
5. Select the source's parameters. For more information concerning source parameters, refer to the appropriate help entry in the [Administration Tool](#) help.
 6. Click  **Save** to create the source without starting the indexing process (this function allows to modify the source's properties prior to indexing) or  **Save and Start** to create the source and start the indexing process with the default properties. The **Status** page is displayed.

How to Manually Index Sources

Before performing a query in the Search Interface, the index must be populated; therefore, the sources configured must be crawled. Because this process requires considerable CPU resources, this operation is automatically scheduled to be executed at 12 A.M; however, it is possible to modify the scheduled time in order to crawl whenever necessary.

1. Access the **Sources and Collections** page (Index > Sources and Collections).
2. Select the checkboxes corresponding to the appropriate collections to index.
3. In the **More Actions** drop-down list of the **Collections** section, select **Rebuild**. The sources of the selected collections are indexed.

Collections



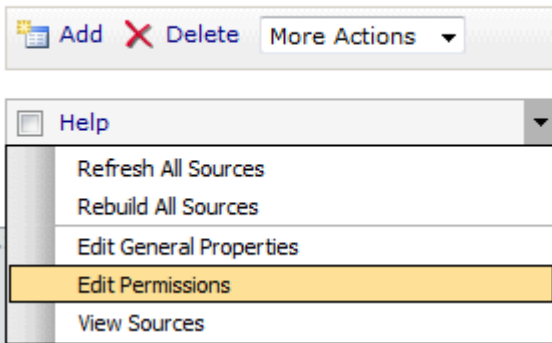
Note: To index a specific source, select the appropriate collection and source checkboxes and in the **More Actions** drop-down list of the **Sources** section, select **Rebuild**.




How to Define the Permissions of a Collection

Collections are groups of sources built around a theme (e.g. *Human Resources* and *R&D* collections). Each one has its own security permissions which override those of sources, meaning that users can never query the content of a source without having access to its parent collection; however, it is possible to modify the collection's permissions at any time.

1. Access the **Sources and Collections** page (Index > Sources and Collections).
2. In the **Collections** section, expand the appropriate collection's drop-down list.

Collections

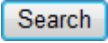


3. Select **Edit Permissions**. The **Permissions** section is displayed.
4. To grant access to the collection, enter the account name of the user or group (it must be an NT/AD account in the form domain\user) in the **Allowed Users** field and click  **Add**.
5. To revoke access to the collection—if the account is listed in the **Allowed Users** section—select the account and click  **Delete**.
6. To revoke access to the collection—if the account is not listed in the **Allowed Users** section (because it is part of a listed group)—enter the account name (it must be an NT/AD account in the form domain\user) in the **Denied Users** section and click  **Add**.

Performing Search Queries

How to Perform a Search

The Search Interface is a single entry point providing access to the index content. It allows users to perform queries as well as display, sort and save results. Note that *Coveo Enterprise Search for Intranet* Search Interface is Web-based, meaning that it can be integrated to any *.aspx* page and accessed through *Internet Explorer* or *Firefox* browser. Moreover, other search components, such as external search modules, can be integrated to it in order to query third party repositories. Users who have access to the *Coveo Enterprise Search for Intranet* server and virtual directory can query the index through the Search Interface. However, access to the index content is restricted by collection, source and file permissions.

1. Open the *Windows Start* menu.
2. Access the Search Interface (All Programs > Coveo Enterprise Search 6 > Search Interface). The **Initial** page is displayed.
3. Enter the appropriate keywords for the search.
4. Click  or press **Enter**.

Note: The **Initial** page is displayed when the Search Interface is first accessed—before any query is performed (afterwards, the **Search** page is used).

How to Configure the Interface Editor

The Interface Editor is a powerful tool which allows the user to create and customize different versions of the Search Interface. For example, it is possible to create a Search Interface to integrate in a Web page and another to integrate in a *SharePoint* intranet. Moreover, each of these interfaces can have different options (e.g. *Search Within Results* and *Refine by Language*) and formatting.

Only *Coveo Enterprise Search for Intranet* administrators have access to the Interface Editor. Administrator privileges are granted in the Administrators page of the Administration Tool (Configuration > Security).

Note: By default, administrators of the server on which CES is installed are administrators of CES.

1. Access the *Windows* **Start** menu.
2. Access the Interface Editor (All Programs > Coveo Enterprise Search 6 > CES Interface Editor). The **Global Settings** page is displayed.

Global Settings		Close Defaults Help
Manage Interfaces Per Uri Settings Custom Formats		
Currently Defined Interfaces		Create New Delete
<input type="checkbox"/> Default		Open Search Interface
<input type="checkbox"/> Files		Open Search Interface
<input type="checkbox"/> Email		Open Search Interface
<input type="checkbox"/> Mobile Email		Open Search Interface
<input type="checkbox"/> People		Open Search Interface
<input type="checkbox"/> MobilePeople		Open Search Interface
<input type="checkbox"/> Salesforce		Open Search Interface
<input type="checkbox"/> SharePoint 2007		(cannot view if not within SharePoint)
<input type="checkbox"/> SharePoint Sites and Lists		(cannot view if not within SharePoint)

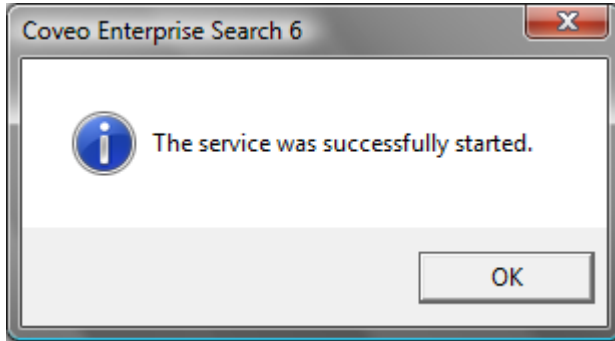
3. Click the currently defined interface to edit. The **Interface Editor** page is displayed.
4. If the **Features** tab is not selected, click [Features](#).
5. In the different pages available, enter the appropriate parameters. For more information, refer to the **How to Modify Features** help entry of the Interface Editor help.
6. Click [Apply](#).

Troubleshooting

How to Start the Service

CES runs as a software service on the destination computer. All software services require a login account. By default, the CES Service should be enabled when you are logged on. If for some reason the CES Service is not running, the Administration Tool and the Search Interface do not start.

1. Open the *Windows* **Start** menu.
2. Access **All Programs > Coveo Enterprise Search 6 > Service**.
3. Click **Start CES Service**. A message box indicates that the service has successfully been enabled.



How to Contact Us

The **Support** section of the Coveo Web site, <http://www.coveo.com/en/Support/default.aspx>, provides articles about installing, configuring and troubleshooting CES. However, for quick and personalized problem resolution, it is recommended to subscribe to the *Premium Support Plan* by contacting *Coveo Sales* by phone at 1-800-635-5476 (US/Canada toll free), 00-800-2673-7642 (international toll free) or email <http://www.coveo.com/go?dest=Contact>.