



Coveo Enterprise Search for Email

Installation Guide

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What Coveo Enterprise Search for Email?

Coveo Enterprise Search for Email is an information access solution for email designed to improve the productivity and effectiveness of business users. It can also be used for legal E-Discovery and compliance. Furthermore, *Coveo Enterprise Search for Email* uses the power of the *Coveo Enterprise Search (CES)* platform to deliver unified search and navigation across both live and archived emails from any connected device. This business solution includes:

- *Coveo Enterprise Search 6.0* licensed specifically for the Coveo email connectors:
 - ▶ *Microsoft Exchange* connector
 - ▶ *Symantec Enterprise Vault* connector
- *Coveo Mobile Search (New!)*:
 - ▶ Browser-based with no training or downloads required
 - ▶ Powerful *Coveo* navigation with facets, quick views and easy to use filters
 - ▶ Customizable mobile device interface
 - ▶ Secure access with SSL support (HTTPS) and Active Directory authentication
- *Coveo Enterprise Search Outlook Integration* (optional)
 - ▶ Full *Coveo* Search interface accessible within *Microsoft Outlook*

Installing Coveo Enterprise Search for Email

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

What Are the Coveo Enterprise Search Platform Requirements?

CES 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:

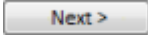
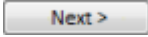
- ▶ CPU: dual 2.0 Ghz or better processors
- ▶ RAM: 4 GB or more
- ▶ 150 MB disk space for *Coveo*
Disk space for the search index varies based on the size of the original documents. Rule-of-thumb: allow for 50% of the size of the original email (e.g., 1 million documents can take ~40GB disk)
- ▶ *Microsoft Windows Server 2003* or *2008*
- ▶ *.NET Framework 3.5* or later
- ▶ *Microsoft Internet Explorer 6.0* or higher, *Mozilla Firefox 2* or higher
- ▶ *Symantec Enterprise Vault 6.0 SP2* or higher (only required if you intend to search email archives)
- ▶ *Mobile Search*: *Windows Mobile 5* or higher with IE mobile, *Blackberry OS 4* or higher with the browser (optional)

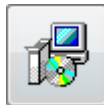
Important: When the installation kit is launched, CES 6.0 automatically installs Internet Information Services (IIS) and *.NET Framework* with all the appropriate options on all supported versions of *Windows* (if they are not already installed). This facilitates the deployment of CES on *Windows Server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

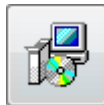
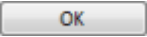
How to Run the Installation Kit

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.

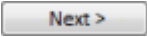



3. Click . The **License Agreement** page is displayed.
4. Read the license agreement and select **I accept the terms in the license agreement** if you agree with the terms.
5. Click . The **Choose Setup Type** page is displayed.



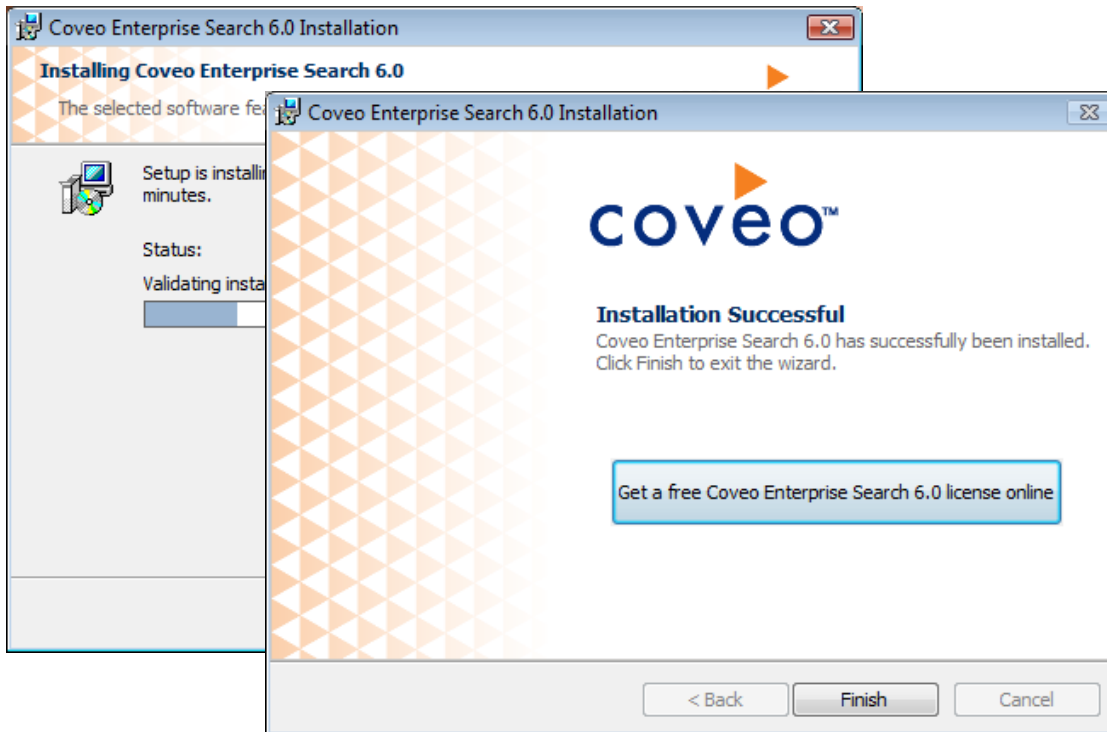
6. Select the **Typical** setup by clicking .
7. In the **Configuration** page, click the **Configure** button corresponding to the **Account** used to access the files to index section.
8. Select **Use this account** to index local and network files and enter the username, password as well as domain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

Note: This account is used to index file servers.

9. In the **Configuration** page, click .
10. To begin the installation, click .

Note: To modify the installation settings, click .

Once the installation is completed, the following screen is displayed:



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 of Coveo Enterprise Search

How to Create an Index

Once CES 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.

Once CES is installed, the Administration Tool is automatically launched. If CES 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*.

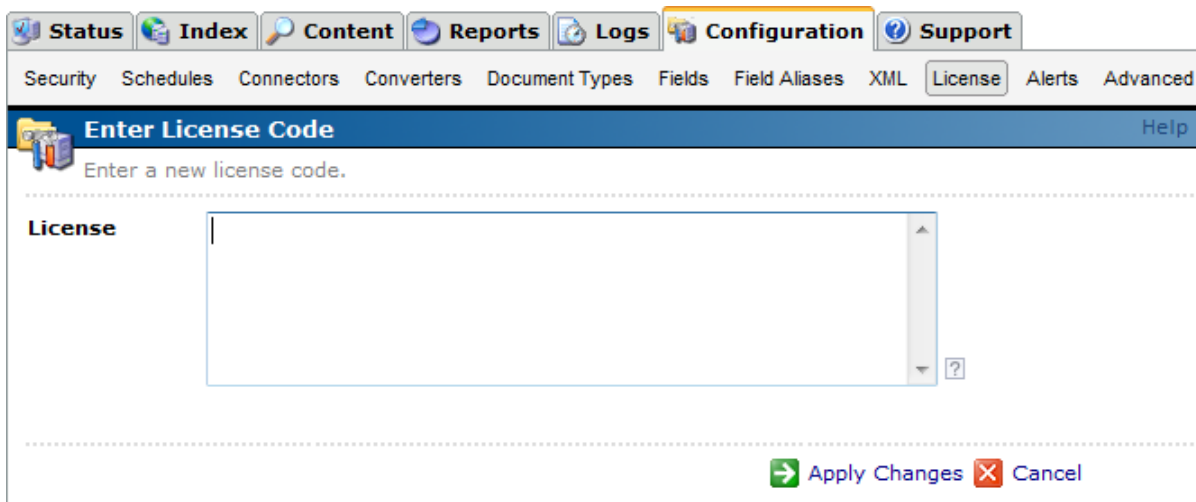
6. Click  **Apply Changes**.
7. Click  **Apply Changes and Create Index**. The **License** page of the Administration Tool is displayed (to execute the validation instructions, refer to **How to Validate the License**).

How to Validate the License


Licensing for *Coveo Enterprise Search for Email* determines the access to the connectors. For example, a *Coveo Enterprise Search for Email* license limits the access to the email and email archive connectors—*Microsoft Exchange V3* and *Symantec Enterprise Vault V3*; while a CES licence gives access to all the available connectors.

Note: If *Coveo Enterprise Search for Email* is purchased and access to the other connectors is desired, it is possible to upgrade the license. The 30-day trial version of CES is also available for anyone wishing to try the full complement of enterprise connectors available.

Once the index is created, the **Enter License Code** page is automatically displayed.



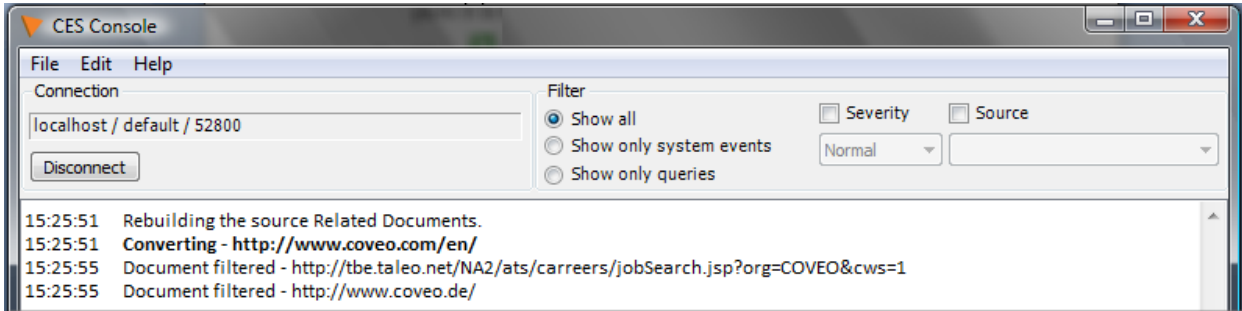
Note: Coveo sends the license to the primary email account provided to Coveo at initial registration or purchase. Contact *Coveo Support* if you have not received the license (typically delivered as an attachment entitled *Coveo Enterprise Search License Code.txt*).

1. Open the *Coveo Enterprise Search License Code.txt* file in Notepad.
2. Select the license and make sure to include the {BEGIN LICENSE} and {END LICENSE} tags, then copy and paste it in the **License** field.
3. Click  **Apply Changes**.

How to Start the Coveo Enterprise Search Console

The CES Console displays the activities of the CES service in a separate window as well as useful real-time information such as connection, crawling and indexing operations.

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



Note: By default, the CES 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 **Connect**.

Note: No activity is displayed in the window until settings are modified in CES, or indexing and querying activities are activated.

Configuring the Microsoft Exchange Connector

The *Microsoft Exchange* connector allows users to index *Microsoft Exchange* content. To index all users' emails including public folders, create a *Coveo* user identity using a *Microsoft Exchange* administrative account.

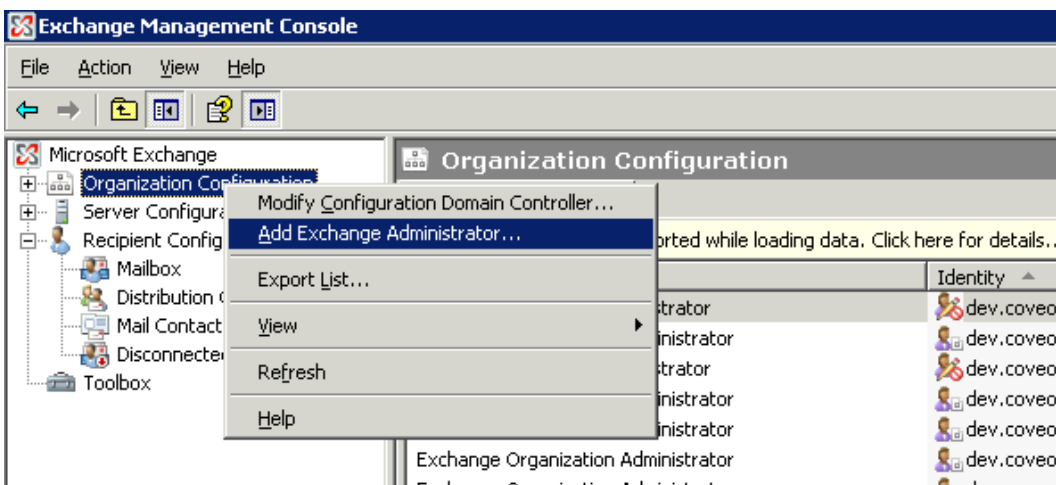
How to Setup an Administrative Account

In order to crawl multiple mailboxes using a single source, it is important to setup a special account in the *Microsoft Exchange Server*. This account must be given read access on all the mailboxes to index, as well as the public folders if necessary.

For more information on how to setup such an account, click the following link for the *Microsoft Exchange Server 2003* setup <http://support.microsoft.com/default.aspx?scid=kb;EN-US;821897>.

As for the *Microsoft Exchange Server 2007* setup, the following procedure gives sufficient rights to a user to crawl using WebDav or WebServices.

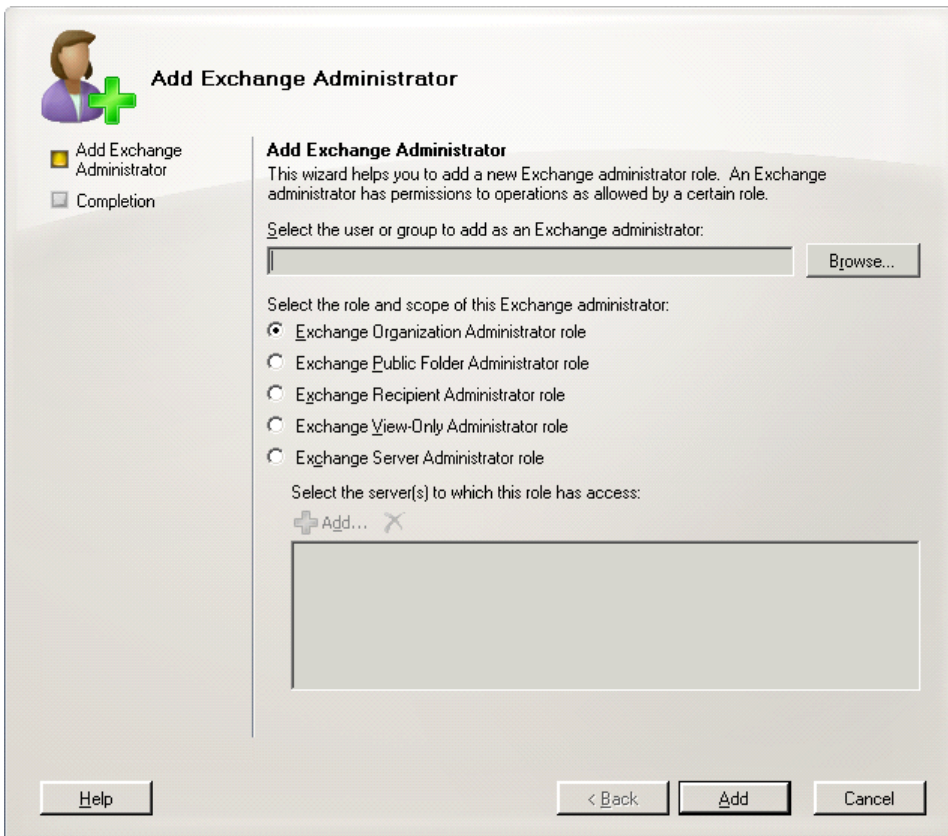
To setup the user correctly, open the *Exchange Management Console*, right-click on **Organization Configuration** and click **Add Exchange Administrator...**



In the **Add Exchange Administrator** wizard, specify the user that will crawl and make him an *Exchange View-only Administrator*. It is important to note that the user promoted to *View-Only Administrator* must not be part of the *Domain Administrators*, *Enterprise Administrators* or *Organization*

Administrators. This is because these groups automatically receive explicit denied permissions on the *Read/Write* and *Read-Only* permissions for each mailbox.



Important: This is the only procedure allowing the user to crawl using both WebDav and WebServices.



The *Microsoft Exchange* connector supports the common implementations of front-end and back-end server suggested by *Microsoft*. For more information, refer to [http://technet.microsoft.com/en-us/library/aa997482\(EXCHG.65\).aspx](http://technet.microsoft.com/en-us/library/aa997482(EXCHG.65).aspx) and [http://technet.microsoft.com/en-us/library/bb124804\(EXCHG.65\).aspx](http://technet.microsoft.com/en-us/library/bb124804(EXCHG.65).aspx).

How to Configure a User Identity based on an Administrative Account

Once the connector's administrative account has been setup, it is necessary to configure a CES user identity:

1. In the Administration Tool, access the **Administrators** page (Configuration > Security).
2. In the left navigation pane, click **User Identities**. The **User Identities** page is displayed.
3. Click . The **Modify User Identity** page is displayed.
4. In the **Name**, **User** and **Password** fields, enter the credentials of the administrative account.
5. Click .

← Security - User...

Name	<input type="text" value="companyname\jsmith"/>
User	<input type="text" value="companyname\jsmith"/>
Password	<input type="password" value="•••••"/>
Option	<input type="checkbox"/> Support basic authentication
Client certificate	<input type="checkbox"/> Use client certificate
Store	<input type="text" value="Personal"/>
Certificate	<input type="text"/>

Used By

Configuring the Symantec Enterprise Vault Connector

The *Symantec Enterprise Vault* connector is optional and allows crawling and indexing of *Windows* files and *Microsoft Exchange* items stored in the archives. The *Symantec Enterprise Vault Administration Console* component must be installed on the *Coveo* server in order for the *Symantec Enterprise Vault* connector to work adequately.

What Are the Platform Requirements?



The *Symantec Enterprise Vault* connector requires the following in order to work adequately:

- ▶ *Symantec Enterprise Vault 6.0 SP2* (and over);
- ▶ *Coveo Enterprise Search 5*;
- ▶ *Symantec Enterprise Vault's Administration Console* component installed on *Coveo's* server.

Important: When the installation kit is launched, CES 6.0 automatically installs Internet Information Services (IIS) and *.NET Framework* with the 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 Configure a User Identity using Symantec Enterprise Vault's Service Account

To index email archives, it is important to configure a CES user identity based on the credentials of the Service Account created during the installation of *Symantec Enterprise Vault*.

1. In the Administration Tool, access the **Administrators** page (Configuration > Security).
2. In the left navigation pane, click **User Identities**. The **User Identities** page is displayed.
3. Click . The **Modify User Identity** page is displayed.
4. In the **Name**, **User** and **Password** fields, enter the credentials of the administrative account.
5. Click .

How to Impersonate a User

Impersonation is performed when a user connects to *Symantec Enterprise Vault* using a different identity than the one used to run CES. To connect to *Symantec Enterprise Vault* using impersonation, execute the following procedure:

1. Promote the user being impersonated to Administrator on the server running CES.
2. In the firewall settings (including *Windows Firewall* if it is used), enable the *Coveo.CNL.HostProcess.exe* process (this executable is found in the *bin* directory of the CES Installation).

Indexing Email and Email Archive 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. *Support Emails* and *R&D Emails* collections), whereas sources are groups of documents from a single repository (e.g. all emails from a specific mailbox). 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 **Security Administrators** page (Configuration > Security).
2. In the **Collections** section, click . 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.

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.

5. Click .

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

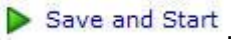
How to Index a Microsoft Exchange Source

To use a single source to index all *Microsoft Exchange* mailboxes, enter a single URL in the **Addresses** box that stops at the mailboxes root (i.e. <https://owa.acme.com/exchange>). To index all public folders, enter a URL that stops at public folders root (i.e. <https://owa.acme.com/public>).

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 of the selected *Microsoft Exchange* server :

Field	Description	Example
Name	Any descriptive name.	All Microsoft Exchange mailboxes
Source Type	The connector used by this source.	Exchange
Addresses	List of starting points for the connector, one address per line.	Addresses are in the form of: https://servername/exchange https://servername/exchange/mailboxname https://servername/public The connector supports both http and https. Ex.: https://owa.acme.com/exchange/johnsmith
Max Number of Retries	Number of retries performed when a request fails due to a <i>Microsoft Exchange Server</i> downtime or temporary unavailability.	The default value is 3.
Retry Delay	Delay between each retry attempt.	The default value is 30 seconds.
Exchange Folder	Name of the folder hosting all the mailboxes.	The default value is <i>exchange</i> . It corresponds to the segment of the URI that is after the server name and points to the mailboxes: https://servername/exchange/ .
Use Form Authentication	Whether to use form based authentication or not.	The default value is <i>False</i> . Necessary when Form Based Authentication is enabled on the <i>Microsoft Exchange</i> server. Two form authentications are supported: Standard <i>Microsoft Exchange</i> form authentication. ISA server form authentication: When an ISA filter is put in front of the <i>Microsoft Exchange</i> OWA server.

Index Exchange Security	Whether to index the securities specified in <i>Microsoft Outlook</i> or not.	The default value is <i>True</i> . Useful to prevent Coveo from indexing user defined securities. Only Active Directory Securities are used.
Index Active Directory Contacts	Whether to index contacts from Active Directory or not.	The default value is <i>False</i> . Useful to let everyone see the contact information available in Active Directory.
Public Folders	Name of the public folder	The default value is <i>Public</i> . It corresponds to the segment of the URI following the server name and pointing to public folders: <code>https://servername/public/</code> .
Index Junk E-mails	Whether to index junk emails or not.	Junk emails are indexed if the checkbox is selected.
Skip Archived Items	Whether to skip items archived by <i>Symantec Enterprise Vault</i> or not.	The default value is <i>True</i> . Useful to make the <i>Microsoft Exchange</i> connector ignore email stubs left behind by <i>Symantec Enterprise Vault</i> .

4. Click  .

Important: It is recommended to minimize the number of sources on a single *Microsoft Exchange* server (for instance, do not create a single source for each mailbox).

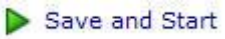
For more information concerning the *Microsoft Exchange* connector, refer to the [Microsoft Exchange Connector](#) documentation.

How to Index a Symantec Enterprise Vault Source

1. From the Administration Tool, access the **Sources and Collections** page (Index > Sources and Collections).
2. Create a new source, either in an existing or new collection.
3. Enter the following information in the appropriate fields:

Field	Description	Example
Name	Any descriptive name.	Vault - Server name of the <i>Symantec Enterprise Vault</i> installation to connect to.
Source Type	The connector used by this source.	Symantec Enterprise Vault
Addresses	List of starting points for the connector, one address per line. Addresses are in the form of: Server>site>store>archive	Minimal form (index whole store): > is the path separator serverName>storeName Extended (index entire site or only archive): serverName>siteName>storeName serverName>siteName>storeName >archiveName

Database Server	SQL Server host name.	Name of the machine hosting the SQL server and database, containing the security information for the <i>Symantec Enterprise Vault</i> on which the user is connected.
Database Name	<i>Symantec Enterprise Vault</i> Administration Database name.	The default value is EnterpriseVaultDirectory
DBConnectionString	Connection for <i>System.Data.SqlClient: db name</i> , db server connection security parameters, etc.	For more information, refer to Appendix 1 of the Symantec Enterprise Vault Connector documentation .
Use AD Securities Only For Mailbox Archives	For archives of mailbox type, securities are taken from Active Directory only, instead of the <i>Symantec Enterprise Vault</i> database combined with Active Directory.	<i>Microsoft Exchange</i> and <i>Symantec Enterprise Vault</i> sources are provided with the same securities on their respective items for the same mailbox. The default value is <i>false</i> .


4. Click  **Save and Start**.

Important: It is recommended to minimize the number of sources on a single *Symantec Enterprise Vault* server (for instance, do not create a single source for each mailbox).

For more information concerning the *Symantec Enterprise Vault* connector, refer to the [Symantec Enterprise Vault Connector](#) documentation.

How Sources Are Indexed

Before performing a query in any of the Coveo search interfaces, the index must be populated; therefore, the sources configured must be crawled. By default, live indexing—which scans the repositories and re-indexes modified document at short intervals—is enabled to crawl any new or modified email every 10 minutes. If live indexing is not enabled, perform the following procedure:

1. Access the **Sources and Collections** page (Index > Sources and Collections).
2. In the **Sources** section, click the appropriate source. The **Status** page is displayed.
3. Click  **Enable Live Indexing**.

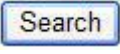
Important: Live indexing can be trusted, to refresh modified documents; therefore, it is recommended not to use the refresh schedules in order to avoid taxing the servers needlessly.

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**.

Performing Search Queries

How to Perform a Search in the Search Interface

The Search Interface is a single entry point providing access to all the indexed content. It allows users to perform queries as well as display, sort and save results. *Coveo Enterprise Search for Email's* search interface is Web-based, meaning it can be integrated to any *.aspx* page and accessed through *Internet Explorer*, *Firefox*, or other browsers. Moreover, the indentation of the search result includes replies, attachments, calendar items, etc. meaning it is possible to find specific information in email or email archives. Users who have access to the CES 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 (afterward, the **Search** page is used).

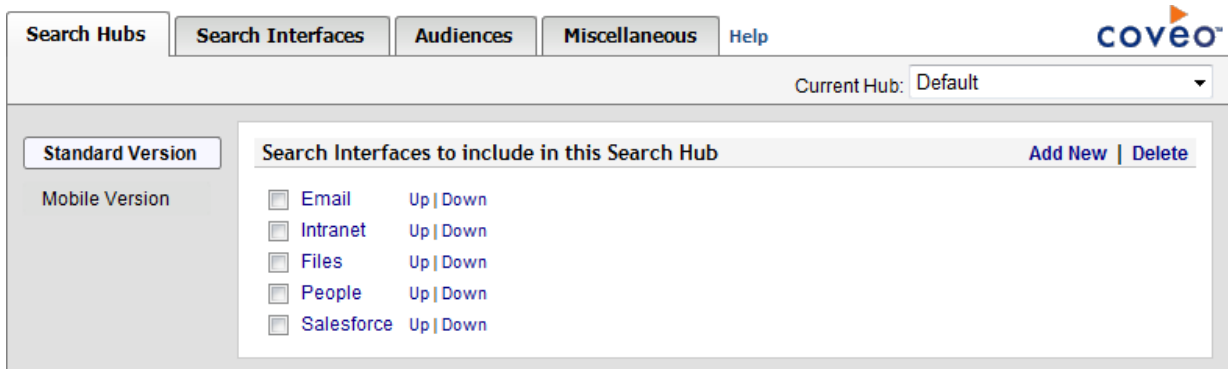
How to Configure the Interface Editor

The Interface Editor is a tool which allows users 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. RSS feed and Search as you type) and formatting.

Only 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 > Interface Editor). The **Search Hubs** page is displayed.



3. Select the **Email** interface.
4. Select **View Search Hub in Browser** from the **Current Hub** dropdown list. A browser is opened, displaying the search hub with the different search interfaces available:

How to Perform a Search in the Mobile Search Interface

Coveo Enterprise Search for Email includes a mobile search interface for unified search from Windows Mobile and BlackBerry devices. Once the interface is configured, authorized mobile users have anytime, anywhere rich search capabilities to quickly find valuable information in their email.


What Are the Platform Requirements?

Operating Environment	Operating Environment	Supported Mobile Browser	Minimum CES Requirement	Coveo downloads required
Windows Mobile	Windows Mobile 5.0 and later	Internet Explorer Mobile (WM5 and WM6)	CES 5.2	Today screen plug-in (optional)
Blackberry	Blackberry 4.2.1 and later	Blackberry browser	CES 5.2	Midlet (optional)


Important: As for Windows Mobile for Smartphone (devices without touch-screens), Coveo supports the browser, but not the plug-in.

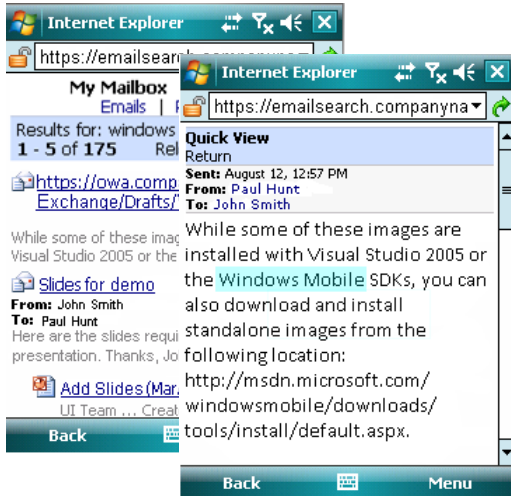
How to Search from a Windows Mobile Device

Note: Windows Mobile devices browse the Web directly using the devices' Internet browser; the Coveo email search page is available using their *Microsoft Exchange* OWA credentials. Coveo recommends enabling encryption for protection. It is important to properly configure your firewall in order for users to be able access their emails.

1. In the **Today** page of the Windows Mobile device, click  and select **Internet Explorer**.
2. In the Windows Mobile **Microsoft Internet Explorer Mobile** screen, enter the URI of your Coveo *Enterprise Search for Email* server, for example <https://emailsearch.companyname.com> in order to access the Coveo Mobile Search Interface. The Coveo **Email Search** screen is displayed:



3. Enter a query in the Windows Mobile textbox and click . A familiar Coveo result page is displayed:
4. Click the appropriate email to view the information searched for. Note that the query entered is highlighted:



How to Deploy the Coveo Enterprise Search Midlet to a BlackBerry Device (optional)

The optional midlet enables access to the *Coveo Enterprise Search for Email* search directly from the BlackBerry home page.

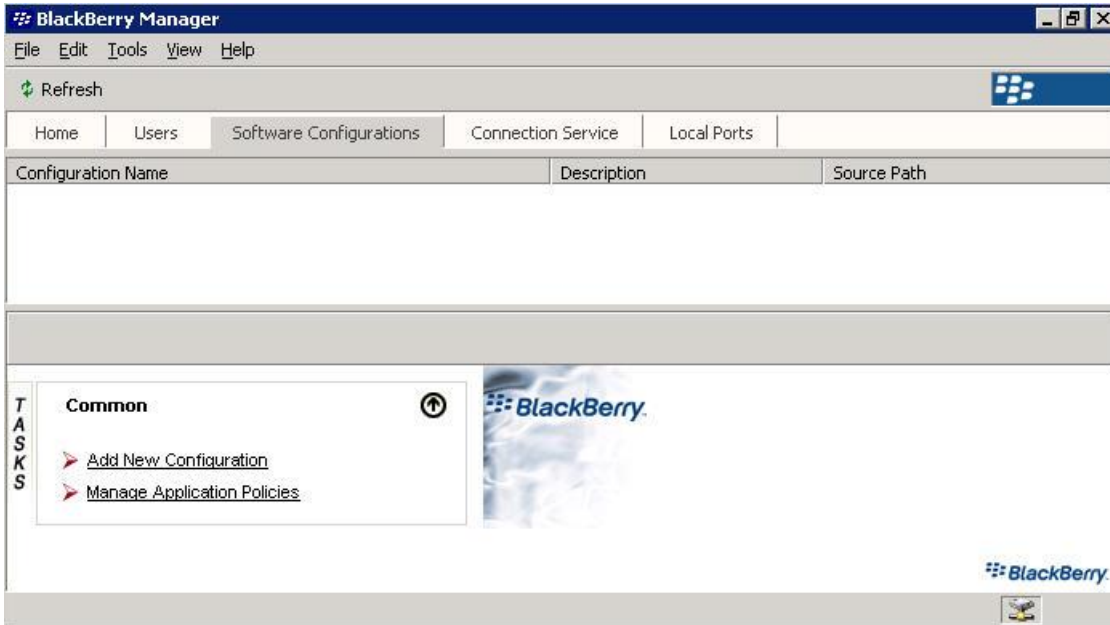
Note: The following procedure must be applied on the server where the BlackBerry Enterprise Server (BES) software is installed.

1. In Windows Explorer, share the *C:\Program Files\Common Files\Research In Motion* folder in **read-only** and create the following subdirectory named *Shared/Applications/Coveo Enterprise Search for Email*.
2. In the *Coveo Enterprise Search for Email* folder, copy the following files: *CoveoSearch.alx*, *CoveoSearchApp.cod* and *CoveoSearchPlugin.cod*.
3. Open a command prompt, change the current directory to *C:\Program Files\Common Files\Research In Motion\AppLoader* and run the following command:

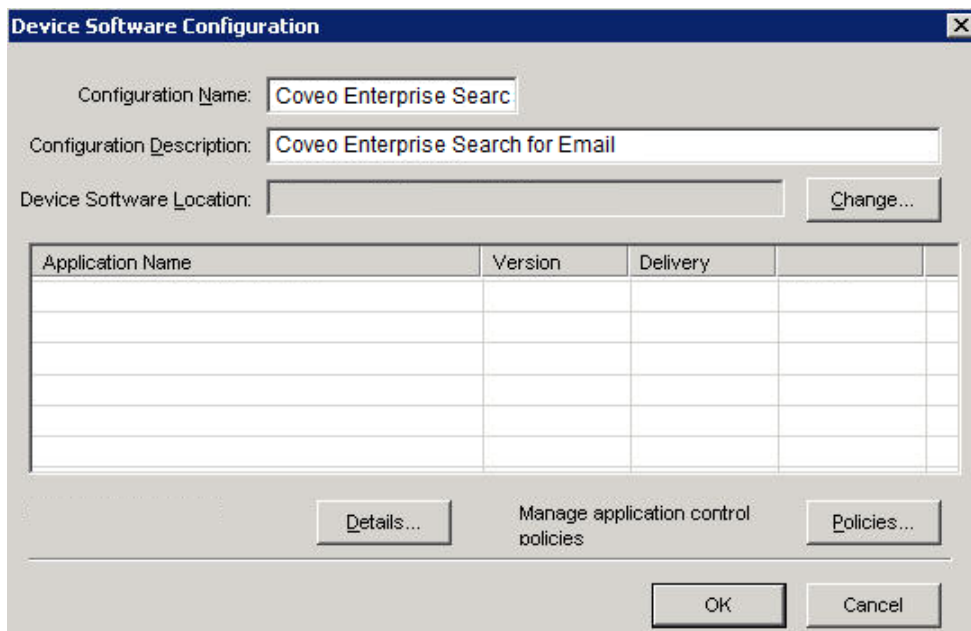
```
Load.exe /index
```


If the command is successful, XML and PKG files are created in the *Coveo Enterprise Search for Email* subdirectory and the command prompt can be closed.

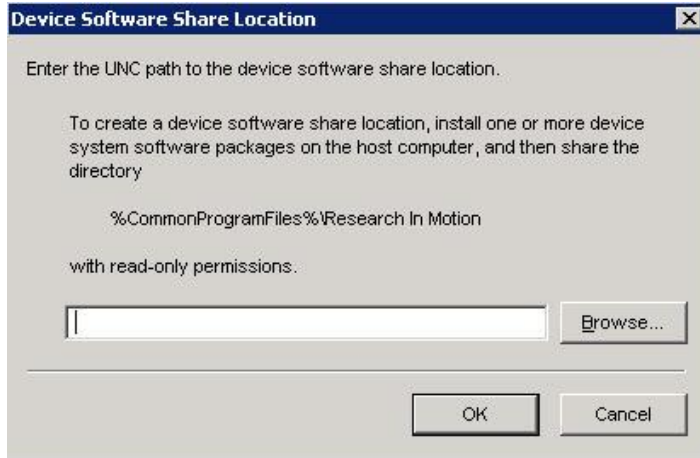
4. Start the **BlackBerry Manager** application. The **BlackBerry Manager** window is displayed.

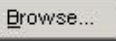


5. In the **Software Configuration** tab, perform one of the following steps:
 - ▶ To add *Coveo Enterprise Search for Email* to an existing software configuration, select it and click **Edit Configuration**.
 - ▶ To create a new software configuration, click **Add New Configuration** and click **OK** to close the first information dialog. The **Device Software Configuration** dialog is displayed.



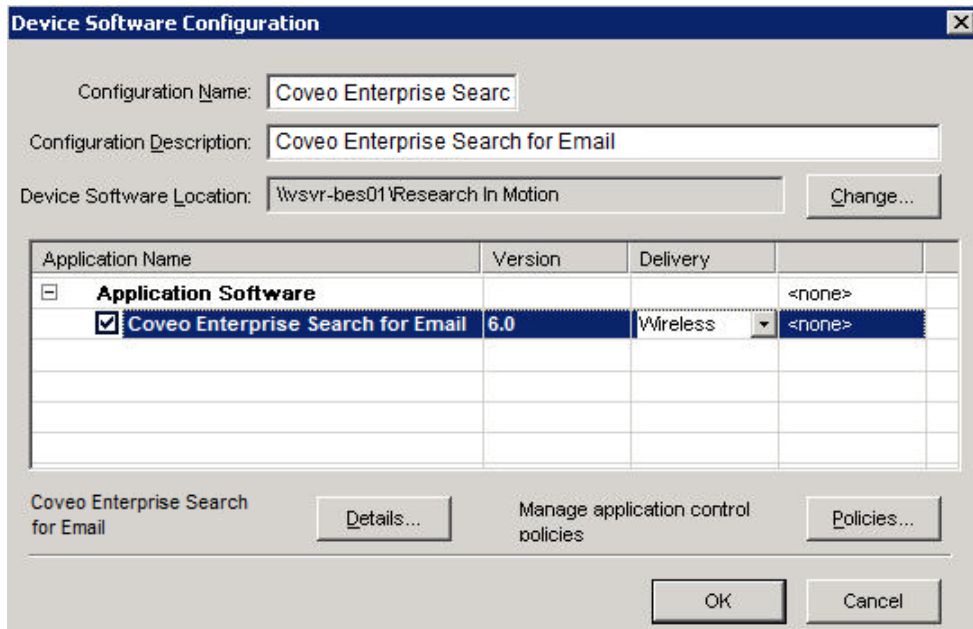
- a. In the **Configuration Name** and **Configuration Description** fields, enter **Coveo Enterprise Search for Email**.
- b. Click .





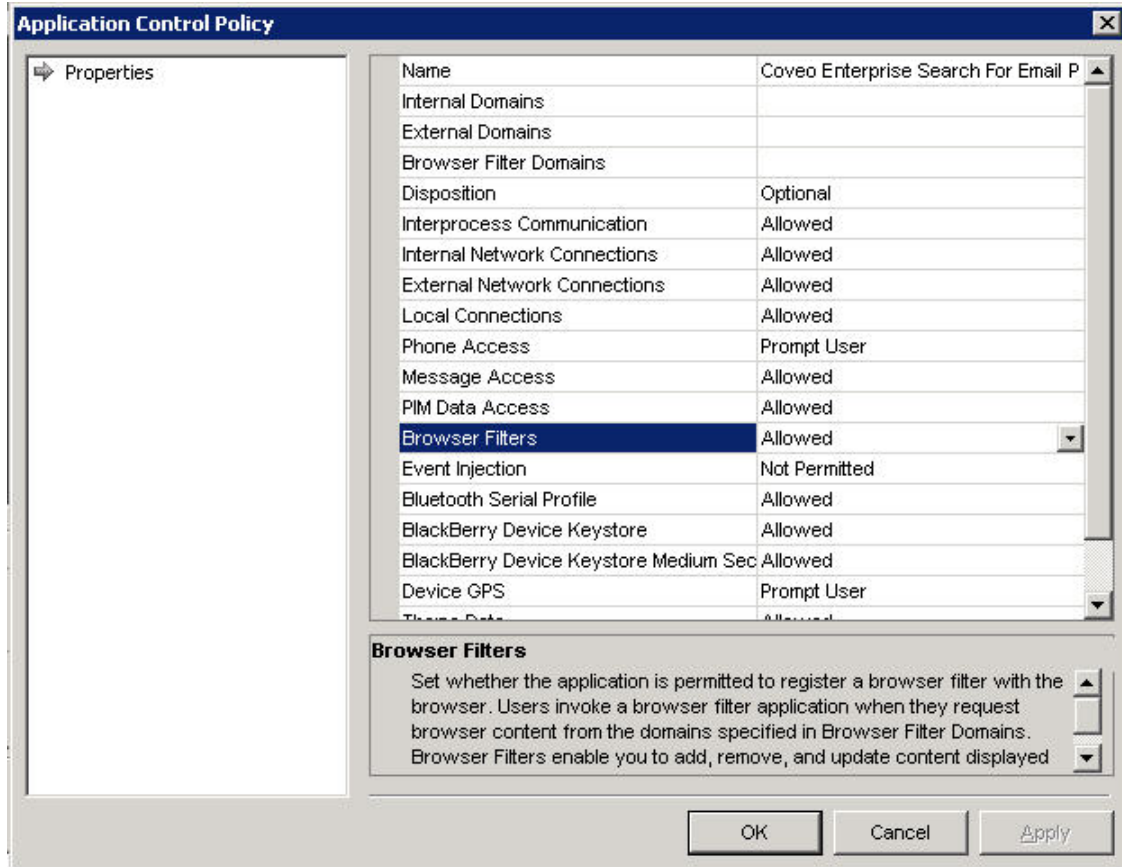
- c. Click  or directly enter the UNC path [\\...LocalMachineName...\Research In Motion](#) (path to the newly created share).

Note: Replace *...LocalMachineName...* by the machine's real name (do not use *localhost* as the name).

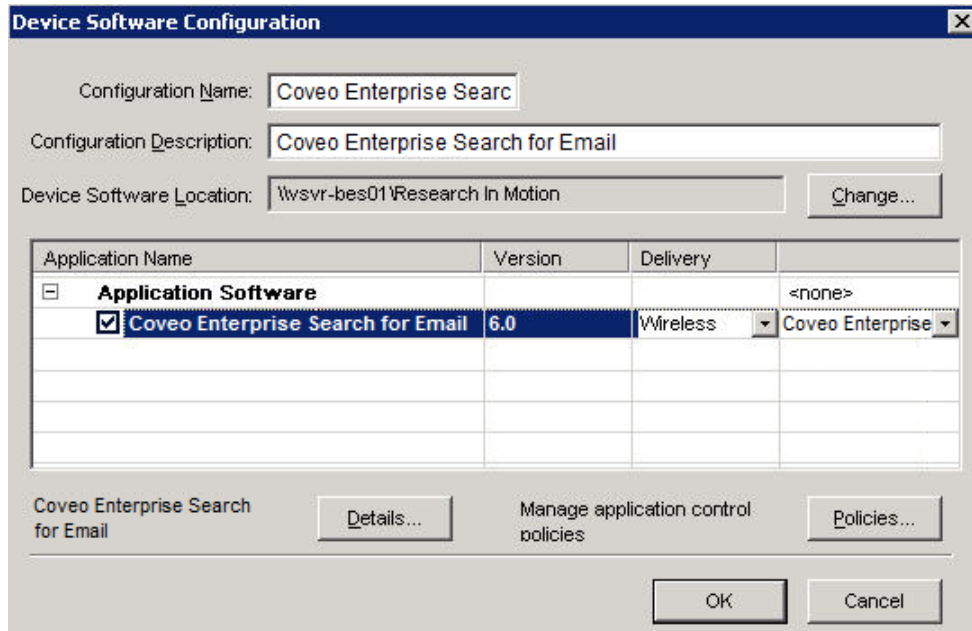
- d. Click **OK**. The **Device Software Configuration** dialog is displayed.
- e. Expand **Application Software** and select **Coveo Enterprise Search for Email**.




- f. In the **Delivery** column, select **Wireless** from the drop-down list. It is mandatory in order to push the midlet to the BlackBerry.
- g. Click . The **Application Control Policies** dialog is displayed.
- h. Click  to create a new policy.
- i. In the **Name** field, enter **Coveo Enterprise Search For Email Policy**.



- j. Set the **Browser Filters**, **Interprocess Communication**, **Message Access**, **Internal Network Connections** and **External Network Connections** to **Allowed**.
- k. Click twice. The **Device Software Configuration** dialog is displayed.
- l. In the last column, beside **Delivery**, select **Coveo Enterprise Search for Email Policy** from the drop-down list.




- m. Click .
- n. In the **BlackBerry Manager** window, click the **Users** tab.
- o. If a new software configuration was created, select the users (multiple selections) and click **Assign Software Configuration**.
- p. Select **Coveo Enterprise Search for Email** from the configuration list and click **OK**.

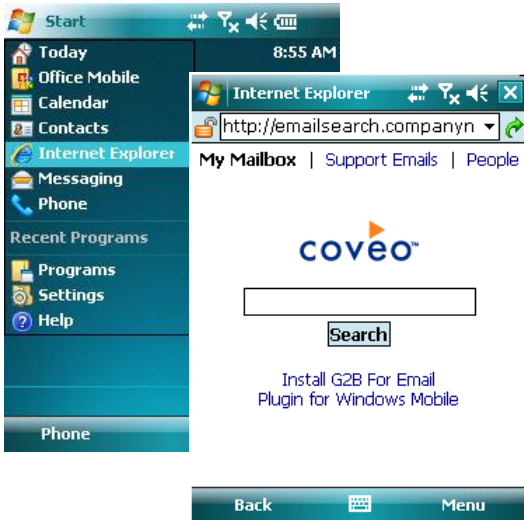
Note: If **Coveo Enterprise Search for Email** has been added to an existing software configuration that is already assigned to the users that have to receive **Coveo Enterprise Search for Email**, steps *h* through *k* can be skipped.


By default, BES runs a batch job every 4 hours that pushes the applications to the BlackBerry devices. The midlet can be pushed manually by right-clicking on the users (again, more than one can be selected at a time) and clicking **Deploy Applications**.

How to Install the Coveo Enterprise Search Today Plug-in for Windows Mobile (optional)


The optional **Today** plug-in enables access to the *Coveo Enterprise Search for Email* search directly from the Windows Mobile **Today** UI can be installed.

1. In the **Today** page of the Windows Mobile device, click  and select **Internet Explorer**.
2. In the Windows Mobile **Microsoft Internet Explorer Mobile** screen, enter the URI of your *Coveo Enterprise Search for Email* server, for example <https://emailsearch.companyname.com> in order to access the *Coveo Mobile Search* interface. The **Coveo Email Search** screen is displayed:



3. Click **Install Coveo Enterprise Search Plugin for Windows Mobile**, then select **Yes** when asked to download the plug-in. A screen specifying that the plug-in was successfully installed is displayed.
4. In the **Today** page of the Windows Mobile device, click  and select **Settings**. The **Settings** page is displayed.



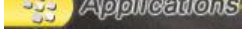

5. Click  **Today**.
6. Click the **Items** tab and select **Coveo Search**. By doing so, the CES search box is displayed in the **Today** screen.

This search box allows users to perform a query without having to enter the URI of the *Coveo Enterprise Search for Email* server in the **Microsoft Internet Explorer Mobile** screen.

How to Search from a BlackBerry Device

Before searching for emails from a BlackBerry device, the administrator must enable basic authentication on the IIS Web site where the Web UI site resides.

Note: BlackBerry devices access Web pages through the BlackBerry Enterprise Server (BES) that typically runs inside the corporate network. It is recommended to configure the BES in order for *Coveo Enterprise Search for Email* to work adequately.

1. On the BlackBerry **Home** page of the BlackBerry device, click  in order to display the different applications available:
2. In the BlackBerry **Application** screen, click the **BlackBerry Browser** icon :



3. The **Bookmarks** screen is displayed:



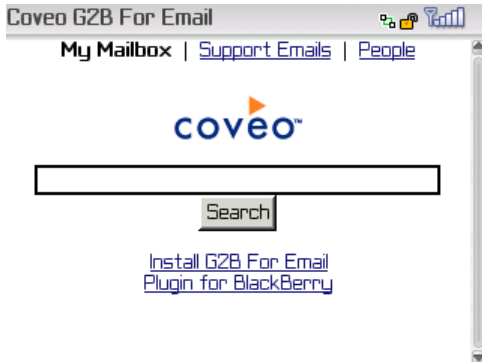
4. Click **Menu**, then select **Go To...**:



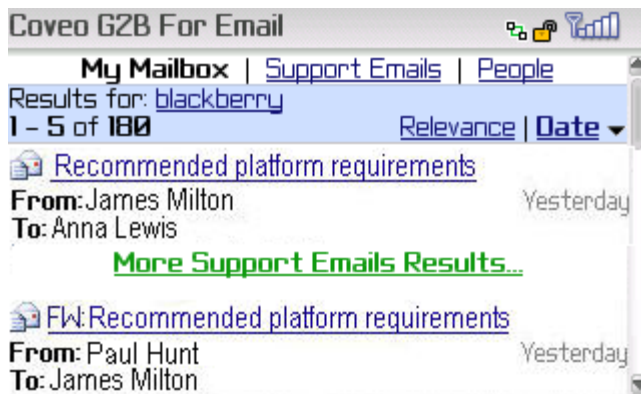
The **Go To** screen is displayed, enabling you to enter the appropriate URL:



- To access the Coveo Mobile Search Interface, enter the URI of your *Coveo Enterprise Search for Email* server, for example <https://emailsearch.companyname.com>.
- Enter the *Windows* domain username and password to display the Coveo **Email Search** screen:



- Perform a search on the BlackBerry by entering the appropriate keyword in the textbox and clicking . A familiar Coveo result page is displayed:



- Click on the appropriate email to view the information searched for. Note that the query entered is highlighted:



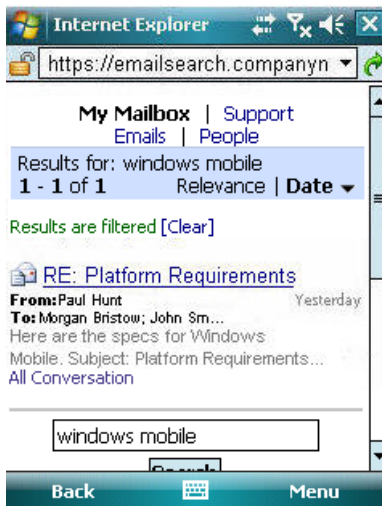
The Coveo Mobile Search Interface

Coveo Mobile Search is a browser-based interface based on CES's Search Interface but designed for mobile devices. When a query is entered, on either Windows Mobile or BlackBerry, the results are displayed in an interface similar to the search interface of CES and sorted by date.

Facets are available in order to further refine the search by scrolling at the bottom of the screen:



Click the appropriate facet to enable it and click again to disable it. In this example, three results are displayed for emails matching the query *Windows Mobile* and the facet *From: Paul Hunt*.



Installing and Configuring the Optional Coveo Enterprise Search Microsoft Outlook Add-In

The CES *Microsoft Outlook* Add-In allows unified search of emails and email archives via *Coveo Enterprise Search for Email* without leaving *Microsoft Outlook*. By doing so, they don't have to open an external Web browser. Furthermore, the CES *Microsoft Outlook* Add-In provides a full *Coveo* search interface in *Microsoft Outlook*.

Coveo has integrated its own search box in the *Microsoft Outlook* command bar. Hence, queries performed in that search box open the **Coveo Email Search** search interface in the *Microsoft Outlook* integrated Web browser.

The CES *Microsoft Outlook* Add-In is distributed as a *Microsoft Office* Add-In that targets *Microsoft Outlook*. The add-in can be deployed and configured locally on a user desktop using the **Setup.exe** (for more information, refer to **How to Download and Apply the CES Microsoft Outlook Add-In Package** in this guide) or widely through a company using Active Directory Group Policies (GPO) or other mass deployment mechanism (for more information, refer to the **How to Customize the CES Microsoft Outlook Add-In using GPO** section).

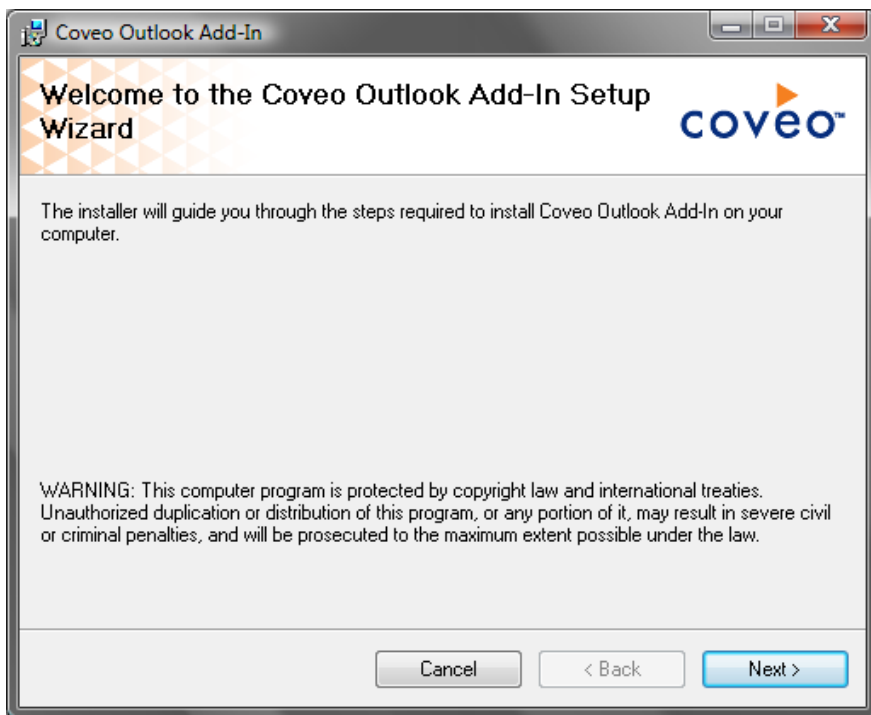
Requirement

- ▶ *Windows Installer 3.1*

How to Download and Apply the CES Microsoft Outlook Add-In Package

This procedure explains how to download and apply the CES *Microsoft Outlook* Add-In package locally on a user desktop.

1. Contact Coveo Sales for download instructions.
2. Once downloaded, install using the **Coveo Outlook Add-In** install kit.



3. When the add-in is installed, open *Microsoft Outlook*.

For information on how to perform a first time configuration, refer to the [How to Perform a Search in Microsoft Outlook](#) section.

How to Customize the CES Microsoft Outlook Add-In Using GPO


This procedure explains how to configure the CES *Microsoft Outlook* Add-In using GPO.

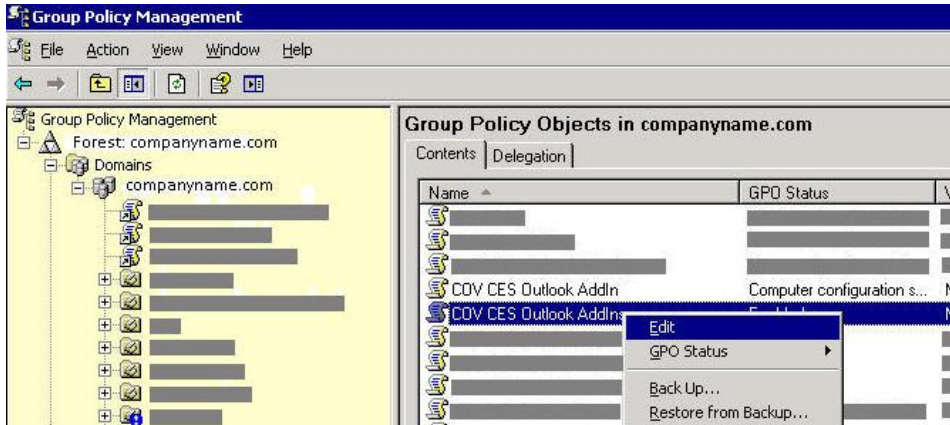
Important: When the add-in is configured using GPO, end users cannot modify the configuration.

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

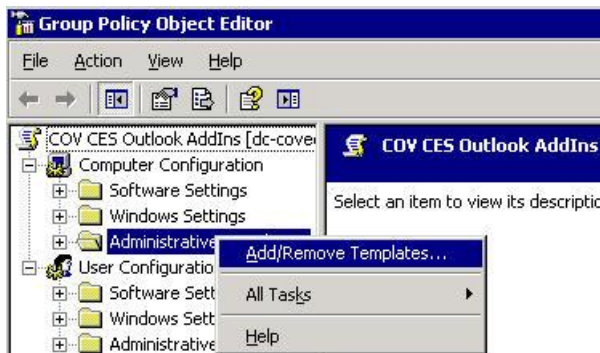
- ▶ Appropriate rights to create and edit group policies in the Active Directory (administrator must at least be member of Group Policy Creator Owners)
- ▶ Group Policy Management MMC
- ▶ Administrative template (*CESOutlookAddin.ADM*)

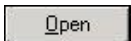


1. Open the **Group Policy Management** MMC.
2. From the navigation panel, expand **Forest: companyname.com > Domains > companyname.com**.
3. Right-click **Group Policy Object** and click **New....**

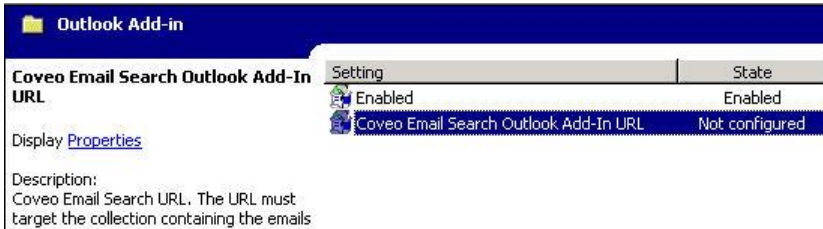
4. In the **New GPO** dialog box, enter a descriptive name, for example *COV CES Outlook ADDIn*, and click .
5. In the **Group Policy Objects in companyname.com** display section, right-click the GPO created and click **Edit**.



6. In the **Group Policy Object Editor** MMC, right-click **Administrative Templates** and click **Add/Remove Templates...**



7. In the **Add/Remove Templates** dialog box, click **Add...** to add the Administrative template.
8. Select the *CESOutlookAddin.ADM* file where it was previously saved and click .
9. In the **Add/Remove Templates** dialog box, click . The **Group Policy Object Editor** MMC is displayed.
10. From the navigation panel, expand **User Configuration > Administrative Templates > Coveo > Enterprise Search > Outlook Add-in**.
11. In the display panel, double-click the **Enabled** setting. The **Enabled Properties** dialog box is displayed.
Note: The **Enabled** setting defines whether the add-in is located at the Startup of *Microsoft Outlook* or not.
12. Select the **Enabled** option and click .
13. In the **Outlook Add-in** display panel, double-click **Coveo Email Search Outlook Add-In URL**.



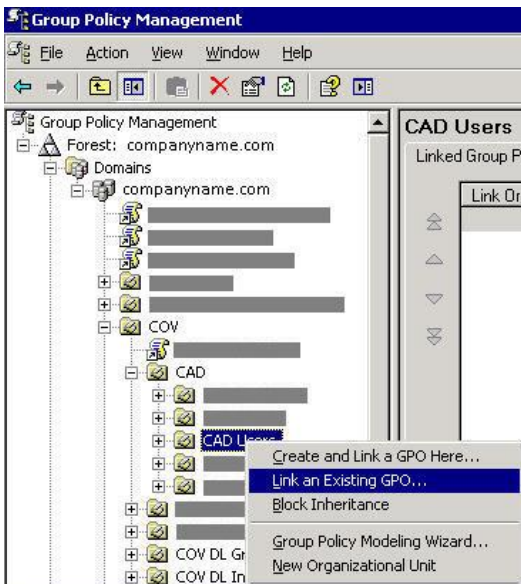
Note: The **Coveo Email Search Outlook Add-In URL** setting represents the URL of the email search interface on which queries are performed.

14. In the **Coveo Email Search Outlook Add-In URL Properties**, select the **Enabled** option and enter *https://emailsearch.companyname.com* in the **CoveoEmailSearchURL** field.

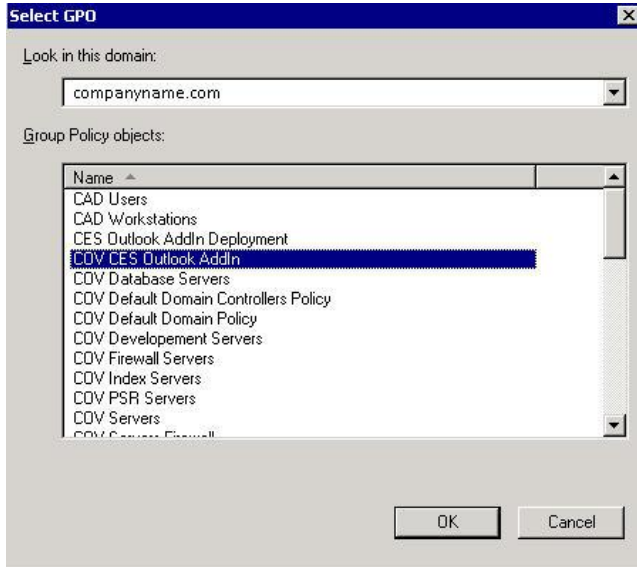
15. Click .

16. Close the **Group Policy Editor** MMC.

17. In the **Group Policy Management** MMC, link the GPO to the appropriate organizational unit (OU) by right-clicking the OU Outlook user where the user accounts reside and selecting **Link an Existing GPO....**



18. In the **Select GPO** dialog box, select the GPO created previously and click .



Important: It is strongly recommended to use a secure HTTPS URL.

For information on how to deploy the CES *Microsoft Outlook* Add-In using the Active Directory GPO, click [How to Deploy the CES Microsoft Outlook Add-In using a Microsoft Active Directory GPO](#).

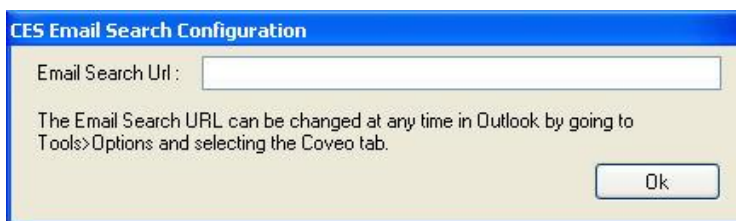
Coveo has enabled the following parameters in order to help users benefit from the *CES Microsoft Outlook* Add-In:

- ▶ **CoveoEmailSearchURL:** The URL of the EmailSearch page.
- ▶ **Enabled:** Whether to activate the add-in or not. This parameter keeps the add-in installed, but does not load it when *Microsoft Outlook* starts.
- ▶ **ShortcutKey:** The key used to redirect the user to the *Coveo* searchbox. This key must be used in combination with CTRL.

Note: The following *Microsoft .Net* requirement must be respected: *Microsoft Installer 3.1*.

How to Perform a Search in Microsoft Outlook

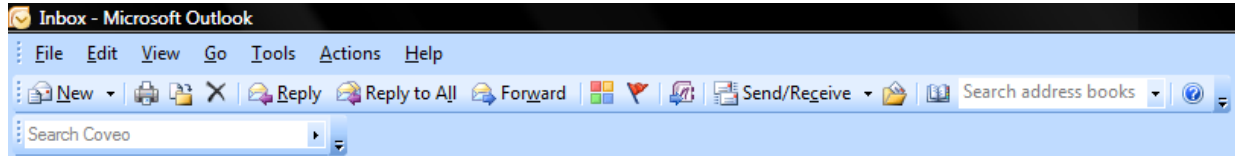
Note: If CES *Microsoft Outlook* Add-In has not been configured by an Administrator, *Microsoft Outlook* will ask you to copy the URL of the email search from the **CES Email Search Configuration** dialog box first:



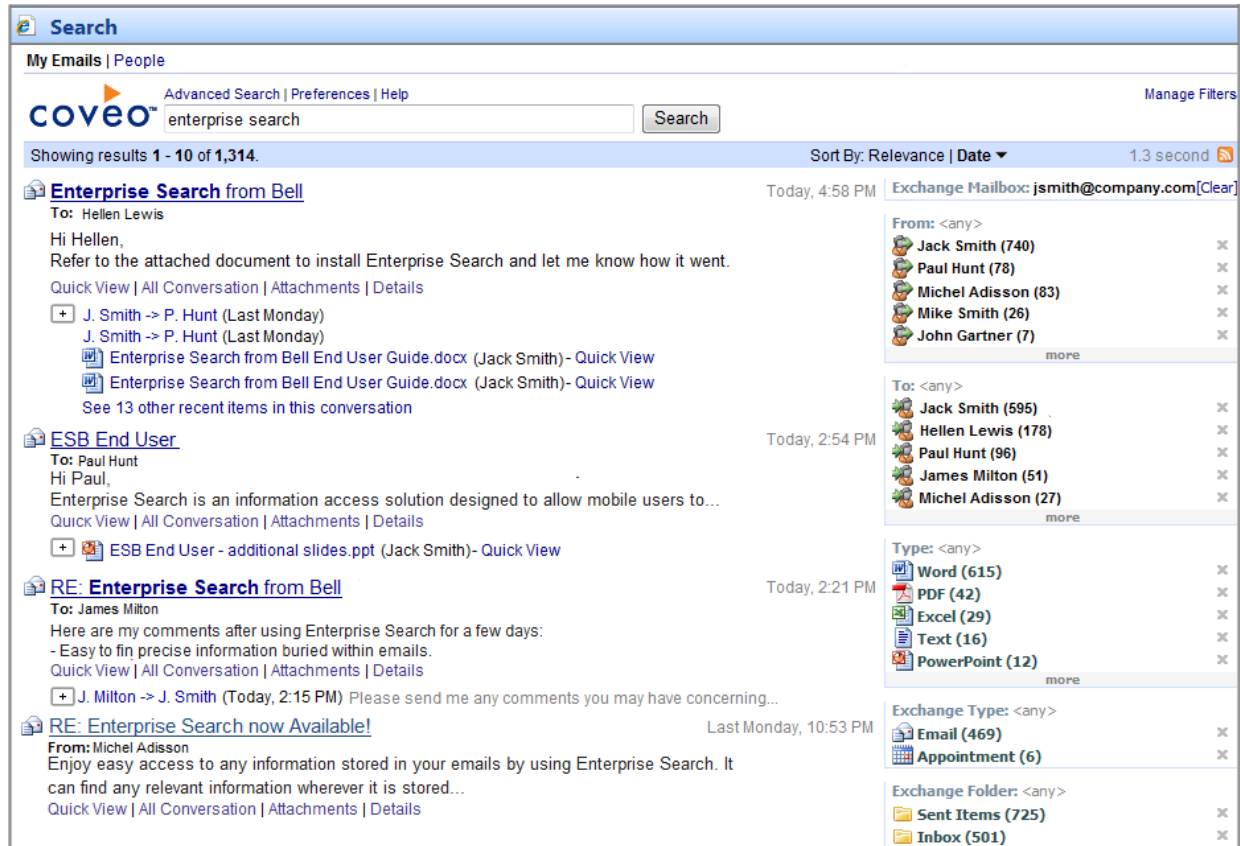
When the URL is copied, click .

Important: As specified in the **CES Email Search Configuration** dialog box, it is possible to go back and change the settings at any time.

1. Open *Microsoft Outlook* (Start > All Programs > Microsoft Office > Microsoft Office Outlook). A *Coveo* search box is displayed in the top left section of the window.



2. Perform a search by entering the desired keyword or phrase in the *Microsoft Outlook* search box and press the **Enter** key.

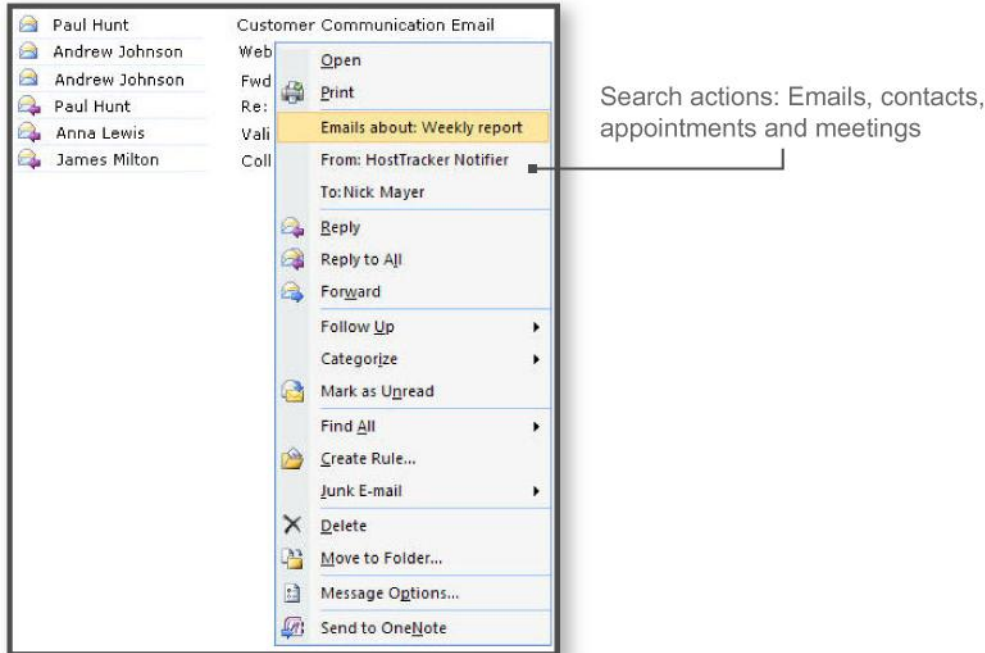


The information displayed and options available are the same as the ones in the *Coveo Enterprise Search* interface.

Another way to launch a query from *Microsoft Outlook* is to use new search actions in the context menu of some *Microsoft Outlook* items. The following lists the different search actions available for specific *Microsoft Outlook* items:

- ▶ **Email:** Related to, To and From
- ▶ **Contact:** From
- ▶ **Appointment/Meeting:** Related to

Note: The previous action list only applies to *Microsoft Outlook 2007*.

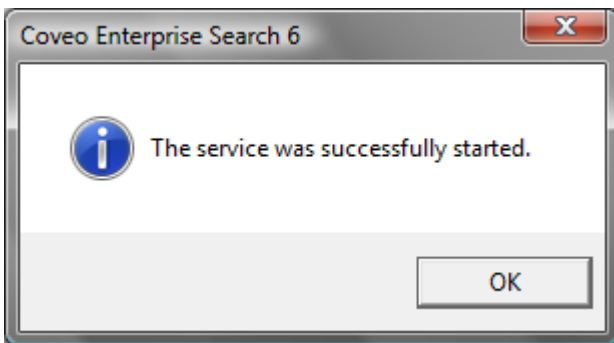


Troubleshooting

How to Start the Coveo Enterprise Search 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 the CES Console (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>.