



Coveo Enterprise Search for Email

Quick Installation Guide

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, *Email Search* 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.



What You Need to Get Started

- ▶ Recommended Hardware and Software (see below)
- ▶ *Coveo Enterprise Search for Email* Software (see below)
- ▶ *Microsoft Exchange* administrative account username, password and domain

If you also have *Symantec Enterprise Vault* for email archiving:

- ▶ *Symantec Enterprise Vault* service account username, password and domain
- ▶ *Symantec Enterprise Vault's* Administration Console software installed on the *Coveo* server

1. 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 emails can take ~40GB disk).

- ▶ *Microsoft Windows Server 2003* or *2008*
- ▶ *Microsoft Exchange Server 2003* or *2007*
- ▶ *.NET Framework 3.5* or later
- ▶ *Microsoft Internet Explorer 6.0* or higher or *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)

2. Coveo Enterprise Search for Email Software

- ▶ *Coveo Enterprise Search 5* or later (downloadable from the *Coveo* Web site – www.coveo.com)
- ▶ *Coveo Microsoft Exchange* connector (included with *Coveo Enterprise Search*)
- ▶ *Coveo Symantec Enterprise Vault* connector (optional and included in *Coveo Enterprise Search*)
- ▶ New! *Coveo Mobile Search* (optional and included in *Coveo Enterprise Search*)
- ▶ New! *Coveo Enterprise Search Outlook Integration* (optional)

To download *Coveo Enterprise Search for Email*, follow the instructions on the download site or refer to the *Coveo Enterprise Search for Email Installation Guide*. The download should take less than 5 minutes over a high-speed connection.



Install and Configure Coveo Enterprise Search for Email

3. Run the Installation Wizard

Run the *Coveo* installation wizard (**Coveo Enterprise Search*.exe**), proceed with the installation, then create a new index (for more information, refer to the *Coveo Enterprise Search for Email Installation Guide*). This step should take less than 5 minutes to complete. For more information, contact *Coveo* Support.



Populate the Index

4. Crawl and Index Microsoft Exchange and Symantec Enterprise Vault Content

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.

Create a source referring to the *Microsoft Exchange* mailboxes. To index all mailboxes from a single source, enter a URL that stops at the mailbox and public folder root (e.g., <https://owa.companyname.com/exchange>).

The *Symantec Enterprise Vault* connector is optional and allows users to crawl and index *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.

To index *Symantec Enterprise Vault* email archives, configure a *Coveo* user identity based on the credentials of the Service Account created during the installation of *Symantec Enterprise Vault* and then create a source referring to the *Symantec Enterprise Vault* archives. To index the entire store from a single source, enter the following path: `servername>storename`.

To populate the index by crawling the sources previously configured, initiate a *Rebuild*. Note that the initial crawling of *Microsoft Exchange* mailboxes can have a performance impact on the *Microsoft Exchange* server; therefore, it is important to schedule it accordingly.

For more information, refer to the [Microsoft Exchange Connector](#) and [Symantec Enterprise Vault Connector](#) documentation or contact *Coveo Support* for best practices.



Experience Information Access at the Speed of Business

The *Coveo Search Interface* is a single entry point providing access to all your indexed content.

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. Administrators and developers can easily create and customize different versions of the Search Interface by using the *Coveo Interface Editor*. Furthermore, *Coveo* 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.

Information Access from a Windows Mobile Device

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 your employees to access their emails.

An optional **Today** plug-in enabling access to the *Coveo Enterprise Search for Email* search directly from the *Windows Mobile Today* UI can be installed. The download is available directly from the *Coveo Enterprise Search for Email* mobile interface.

Information Access 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.

BlackBerry devices access Web pages through the *BlackBerry Enterprise Server* (BES) that typically runs inside the corporate network. If your BES is already configured to allow *BlackBerry* access to emails, you are ready to go!

An optional midlet is also available to access *Coveo Enterprise Search for Email* search directly from the *BlackBerry's* home page. For more information, refer to the *Coveo Enterprise Search for Email Installation Guide*.

Information Access from within Microsoft Outlook

The *Coveo Microsoft Outlook Add-In* allows unified search of emails and email archives via *Coveo Enterprise Search for Email* without leaving *Microsoft Outlook*. For details on how to apply the add-in and customize it using GPO, refer to the *Coveo Enterprise Search for Email Installation Guide*.