



---

## Desktop Searchbar

User Documentation

**Notice**

The content in this document represents the current view of Coveo as of the date of publication. Because Coveo continually improves documentation, information in this document is subject to change without notice. For the latest documentation, visit our Web site at [www.coveo.com](http://www.coveo.com).

**Copyright © 2010, Coveo Solutions Inc.**

**All rights reserved.**

Coveo is a trademark of Coveo Solutions Inc. This document is protected by copyright and other intellectual property law and are subject to the confidentiality and other restrictions specified in Coveo's License Agreement.

# Contents

Introduction.....	5
Searching Using the Desktop Searchbar .....	6
Searching Information Using Simple Criteria .....	6
Understanding the Most Common Search Operators .....	11
Sorting the Results .....	12
Searching Within Results .....	13
Searching Within a Specific Series (Thread) of E-mail Messages.....	15
Using Predefined Filters .....	18
Building a Filter with Multiple Criteria .....	19
Performing Searches in Separate Windows.....	23
Rating Documents and Items .....	24
Understanding the Quick Views and Cached Documents .....	26
Viewing all Documents Related to a Specific Message .....	30
Viewing the Summary of a Message or Document .....	33
Viewing the Properties of a Message or Document .....	34
Exporting Search Results to Microsoft Excel .....	35
Modifying the Keyboard Shortcut to Open the Desktop Searchbar .....	37
Displaying or Hiding the Desktop Searchbar.....	39
Setting Up the Indexing Parameters .....	40
Modifying the Way Local Files are Indexed.....	40
Indexing Local (Offline) E-mail Messages.....	43
Indexing Archived E-mail Messages .....	45
Selecting a MAPI Profile.....	46

---

Maintenance Tasks .....	47
Pausing and Resuming the Indexing Process.....	47
Rebuilding the Index.....	47
Troubleshooting .....	48
Common Problems.....	48
Viewing the Index History .....	51

## Introduction

Both Coveo Expresso and Coveo Enterprise Search (CES) products come with the Desktop Integration Package. The Desktop Integration Package is a special collection of tools to help you with your search operations. It gives you access to many interfaces to search through e-mail messages, contact information, files (local or on a network), SharePoint, etc.

In addition to the Web user interface with which you can perform searches from any Web browser, the Desktop Integration Package offers the two following tools:

- the Outlook Sidebar;
- the Desktop Searchbar.

The present document will guide you, step by step, through the various tasks that you can perform with the Desktop Searchbar. For more information on how to display the Searchbar, see *Displaying or Hiding the Desktop Searchbar* on page 39.

You may also be interested in the Desktop Searchbar Quick Reference Guide, which is also available on our Web site at [www.coveo.com/go?dest=quickrefsearchbar](http://www.coveo.com/go?dest=quickrefsearchbar).

If you need more information about the Outlook Sidebar, please refer to the user manual of the Outlook Sidebar available on our Web site at [www.coveo.com/go?dest=outlooksidebarintro](http://www.coveo.com/go?dest=outlooksidebarintro).

## Searching Using the Desktop Searchbar

Once the *Desktop Integration Package* is installed on your computer, you can display the Desktop Searchbar from anywhere to start searching information.

### Searching Information Using Simple Criteria






You can search through sources (interfaces) such as e-mail messages, contact information, files (local or on a network), intranet, etc.

**IMPORTANT** The availability of the sources depends on the configuration of the system that the administrator will have defined. The items must have already been indexed by the system before they can appear on the results list.

- You can perform simple searches using a word or a phrase or refine your searches with operators such as AND, OR, and NOT in your queries. For more information on the most frequently used operators, see *Understanding the Most Common Search Operators* on page 11.
- The Desktop Searchbar is not case-sensitive, which means that you can enter your keywords and operators either in upper- or lower-case letters.

***Note: The current section presents the interfaces that are typically offered with the Desktop Searchbar. However, the availability of the interfaces on your system and their order of appearance depend on the configuration that the administrator will have defined.***

The table below shows the typical interfaces that come with the Desktop Searchbar:

Search Interface	Description
 My Emails	<p>To search through messages located in your Inbox, in any subfolder or even in an archive (.pst file).</p> <p>You can view messages that correspond to your search criteria.</p> <p>Also, since e-mail messages can often be associated with contacts, the results may also include pertaining contact information retrieved from several lists (Outlook contacts, SharePoint, Salesforce – a CRM application, or Active Directory).</p> <p><b>Note: Espresso does not support Salesforce.</b></p>
 My Files	<p>To search through documents located in the My Documents folder and on Windows Desktop by default and in any other folders that you have added via the file indexing option (see <i>Modifying the Way Local Files are Indexed</i> on page 40).</p>
 People	<p>To search through contact information retrieved from several lists (Outlook contacts, SharePoint, Salesforce, or Active Directory).</p> <p><b>Note: Espresso does not support Salesforce.</b></p>
 Intranet	<p>To search through documents, contacts, and items retrieved from the intranet (SharePoint, Jive, Sitecore, etc.).</p> <p><b>Note: Espresso supports SharePoint intranets only.</b></p> <p>You can view files and other items such as posted news or personal sites that correspond to your search criteria.</p>
 All Content	<p>To retrieve information from all the available sources.</p>

- Regardless of the search interface that you select, the principle remains the same. Once you have entered one or more keywords, the Desktop Searchbar displays all the pertaining results that were found. When there is a great number of results, you can view them, page by page, by using the page links at the bottom of the results area.
- The My Emails interface contains a link enabling you to view more contacts entries. The other interfaces may not have this option, depending on your product (Espresso or CES) and on the configuration defined by your system administrator (CES only).
- You can apply filters to refine (narrow down) your searches. You can exclude some of the elements from your search or restrain your search to a specific category.

You can define one or several search criteria at a time. If you want to define filters with several criteria, see *Building a Filter with Multiple Criteria* on page 19.

- The Intranet and All Content interfaces contain a *Search Within Results* link. For more information on this feature, see *Searching Within Results* on page 13.
- You can clear filters at any time.

**To search using simple criteria:**

1. Use your keyboard shortcut (Windows logo key+C by default) to open the Desktop Searchbar.

OR

With your mouse, point to the orange line located at the top of your screen. For more information on how to display the Searchbar, see *Displaying or Hiding the Desktop Searchbar* on page 39.

2. From the list of interfaces, select the interface on which you want to base your search.



3. Enter the desired expression in the search entry box. For more information on the supported operators that you can use, see *Understanding the Most Common Search Operators* on page 11.



4. Click the magnifying glass at the right of the search entry box to launch the search.

**Note:** You can also press **ENTER** from your keyboard.

The results corresponding to the search criteria are displayed.

Available search interfaces.

Interfaces will vary depending on your product (Espresso or CES) and on configuration defined by your system administrator (CES only).

To display the entire thread (series) of messages as a list.

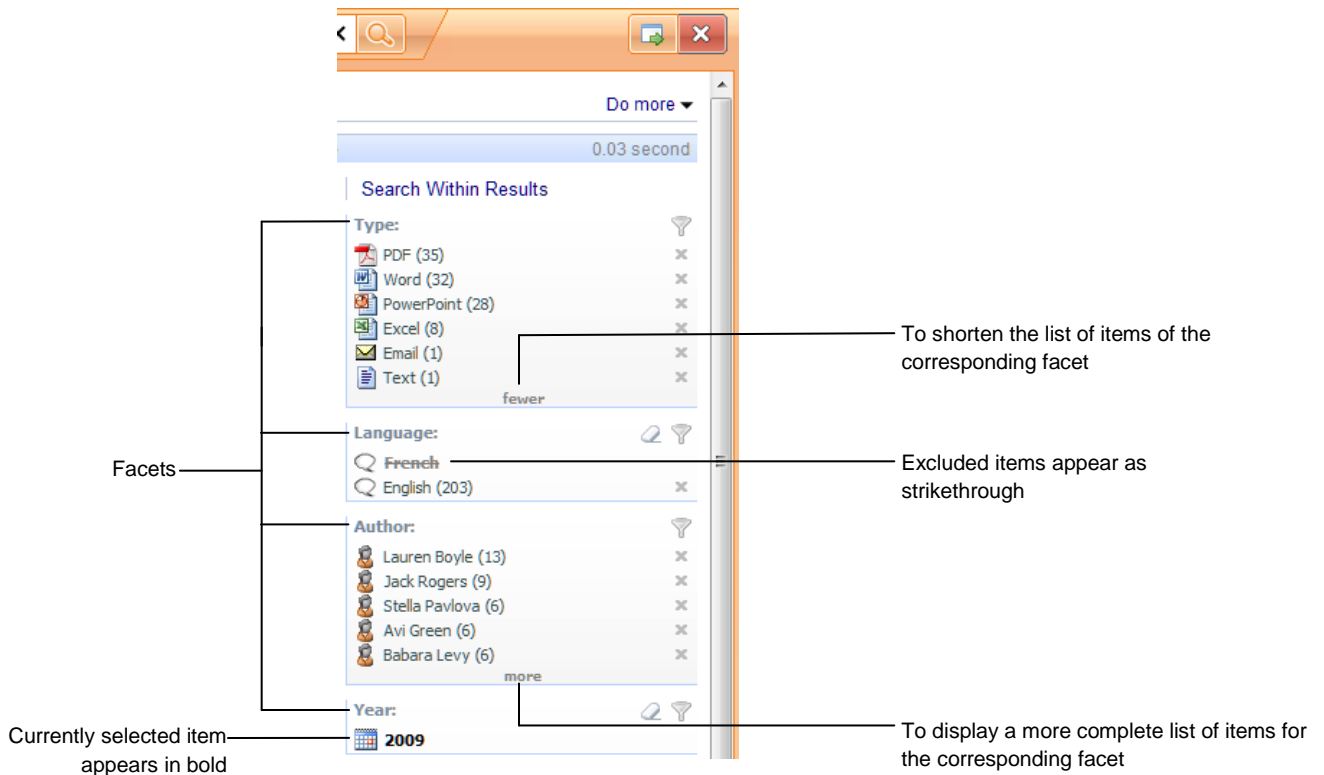
My Emails interface only.

To navigate through pages of results (when applicable)

The screenshot shows a web browser window with the Coveo search interface. The top navigation bar includes 'My Emails', 'My Files', 'Intranet', 'Files', 'People', 'Salesforce', 'Pipeline Q2', and 'All Content'. The search results are sorted by 'Relevance | Date' and show 1-10 of 29,021 results. The first result is an email thread from Liz Smith to Arthur Song and Bob Dobs, dated February 23. The second result is an email from Liz Smith to Josh Davis and Martin Maples, dated January 22. The third result is an email from Liz Smith to Edna Frank and Guy Norling, dated January 22. The fourth result is an email from Liz Smith to Avi Green and Viola Salyers, dated 12/24/2009. The interface includes a 'Search Within Results' sidebar on the right with filters for Mailbox, From, To, Collection, Type, Exchange Type, and Exchange Folder. At the bottom, there is a pagination control showing 'Result Page: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 [Next]' and a 'powered by coveo' logo.

**To refine your search:**

1. Define a filter as wanted.




- If you want to display only the results associated with a particular item from one of the facets, click the item (not the **x**).

**Note: If you click an item that was selected, the selection is automatically removed.**

- If you want to exclude an item from the search results, click the corresponding **x**.

**Note: If you click an item that was excluded from the search (strikethrough), this item becomes available again.**

- If you want to clear the selection or exclusions that have been made to a specific facet, click the  icon.

**Note: Clearing selections or exclusions will not delete any document or item. It only enables you to modify the filter that is applied on search results.**

As you define a filter, the application adjusts the new set of results to reflect the changes.

2. Repeat step 1 with all the criteria that you want to add to your filter.

## Understanding the Most Common Search Operators

You can perform simple searches using a word or a phrase or refine your searches with operators such as AND, OR, and NOT in your queries. The table below shows the operators that are the most commonly used.

Operator	Examples	Remarks
AND	<ul style="list-style-type: none"> <li>coveo AND espresso</li> <li>coveo espresso</li> </ul>	<ul style="list-style-type: none"> <li>Only the items containing both <i>coveo</i> and <i>espresso</i> keywords will be returned.</li> <li>Order of appearance of the keywords is not important.</li> <li>This operator is optional. By default, searches are performed using the AND operator between the keywords if no operator is specified.</li> </ul>
OR	coveo OR espresso	All the items containing either <i>coveo</i> or <i>espresso</i> will be returned.
<ul style="list-style-type: none"> <li>NOT</li> <li>- (dash)</li> </ul>	<ul style="list-style-type: none"> <li>coveo NOT espresso</li> <li>coveo -espresso</li> </ul>	<ul style="list-style-type: none"> <li>Only the items containing <i>coveo</i>, without containing <i>espresso</i> will be returned.</li> <li>If you use the dash, leave a blank space between the first keyword and the dash. Otherwise, the returned items will correspond to the exact expression (<i>coveo espresso</i> in this case) as if you would have used quotation marks.</li> </ul>
" " (quotation marks)	"coveo espresso"	Only the items containing <i>coveo</i> immediately followed by <i>espresso</i> will be returned.
from	<ul style="list-style-type: none"> <li>from:Liz</li> <li>from:"Liz Smith"</li> </ul>	<ul style="list-style-type: none"> <li>You can only use this operator to search through e-mail messages (My Emails interface). In any other interface, no results will be returned.</li> <li>The messages sent by anyone whose name or address contains <i>Liz</i> will be returned.</li> <li>The messages sent by <i>Liz Smith</i> will be returned.</li> </ul>
to	<ul style="list-style-type: none"> <li>to:Liz</li> <li>to:"Liz Smith"</li> </ul>	<ul style="list-style-type: none"> <li>You can only use this operator to search through e-mail messages (My Emails interface). In any other interface, no results will be returned.</li> <li>The messages sent to anyone whose name or address contains <i>Liz</i> will be returned.</li> <li>The messages sent to <i>Liz Smith</i> will be returned.</li> </ul>

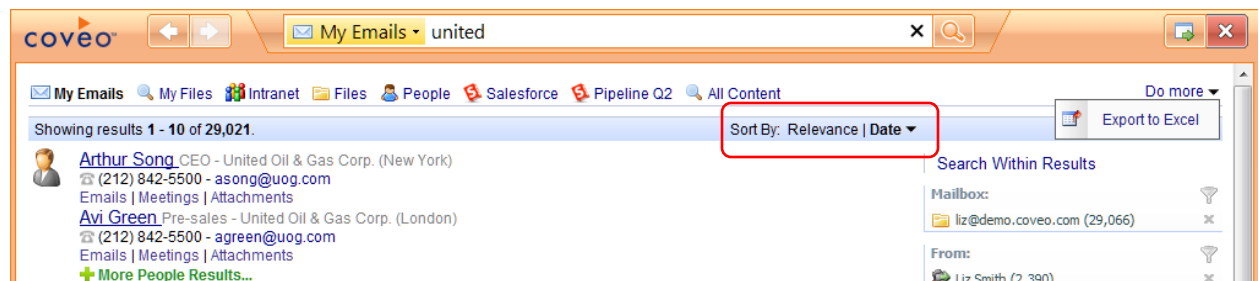
## Sorting the Results

You can sort results according to a specific aspect. By default, you can sort documents and items according to their relevancy score or their modification date. When you sort results by date, the direction of the arrow indicates how the items are sorted (▼ from the most recent to the less recent; ▲ from the less recent to the most recent).

**Note: Other sorting options can be available, depending on your product (Expresso or CES) and on configuration defined by your system administrator (CES only).**

### To sort the results:

1. From the main window, click **Relevance** or **Date**, depending on how you want to sort the results.



2. If you selected **Date** as the sorting option and the order of appearance of the items does not suit your needs, simply click **Date** again to change this order.

## Searching Within Results

The *Search Within Results* feature is available from several search interfaces such as Intranet and All Content. With this feature, you can perform a more “in-depth” search on the *current set of results*.

**Note: If the Search Within Results link is never displayed, it probably depends on the configuration defined by your system administrator (CES only).**

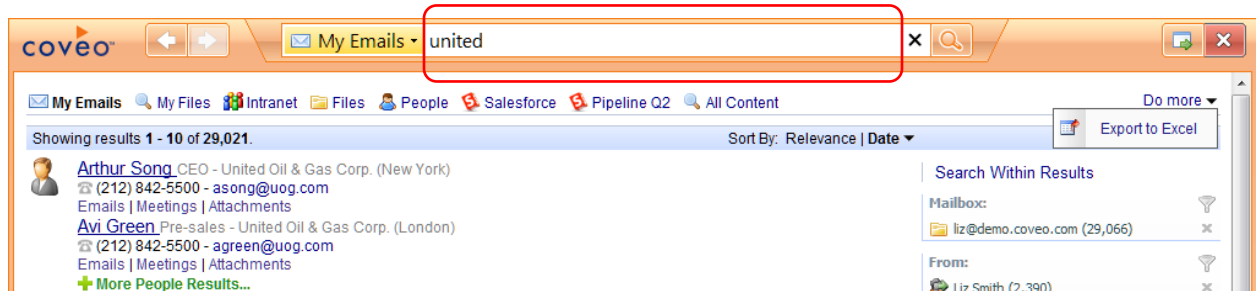
You can still use refinement filters (selections, exclusions, filters with multiple criteria) even if you work with the *Search Within Results* feature.

The *Search Within Results* “filter” will be applied to all searches that you perform until you remove it.

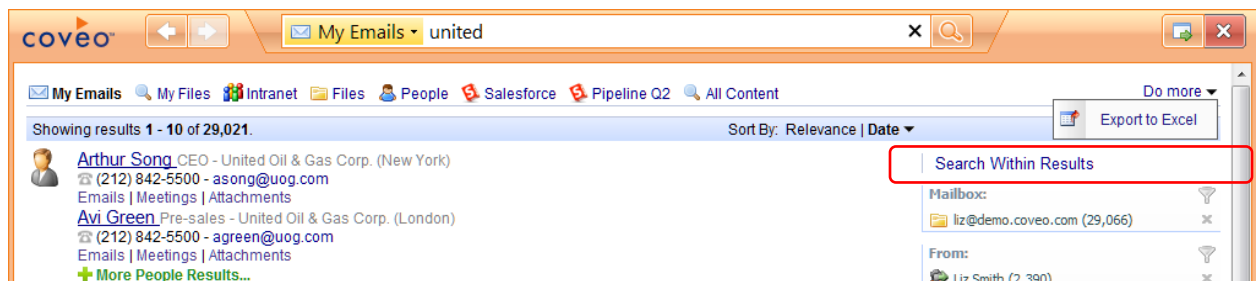
For more information on how to search within a series of messages, see *Searching Within a Specific Series (Thread) of E-mail Messages* on page 15.

### To search within results:

1. If desired, refine the results (see *Searching Information Using Simple Criteria* on page 6 and *Building a Filter with Multiple Criteria* on page 19).
2. In the search box, enter the desired expression.



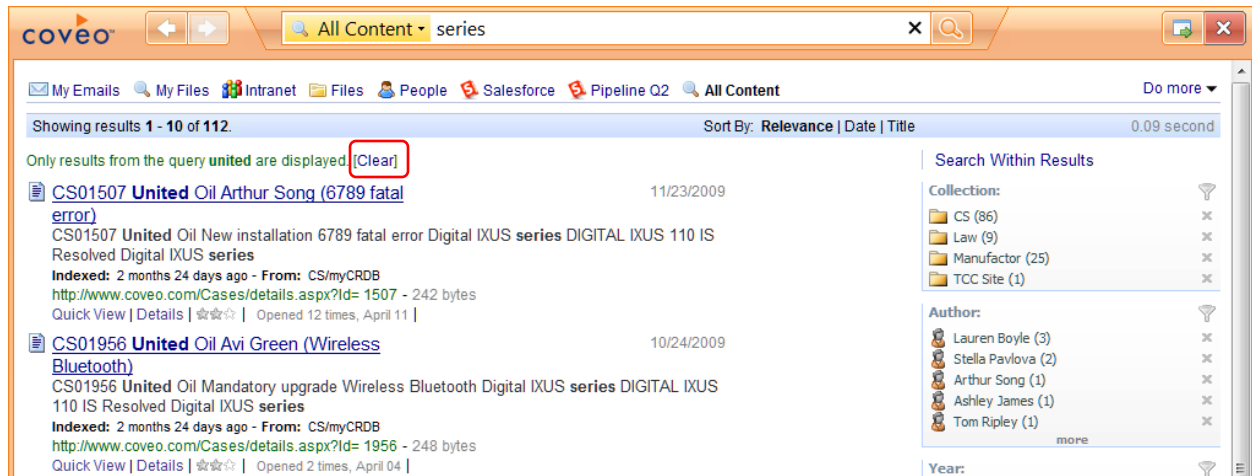
3. Click **Search Within Results**.



The application displays the filtered results.

**To remove all filters (including *Search Within Results*):**

At the top of the results list, click **Clear**.



The application refreshes the results list according to the keyword appearing in the search box (all filters are removed at the same time).

## Searching Within a Specific Series (Thread) of E-mail Messages

The *Search In Conversation* feature enables you to perform a more “in-depth” search on a specific series (thread) of messages. The *Search in Conversation* “filter” will be applied to all searches that you perform until you remove it. You can view the previous set of results or remove the *Search In Conversation* filter at any time.

You can still use refinement filters (selections, exclusions, filters with multiple criteria) even if you work with the *Search In Conversation* feature.

The *Search In Conversation* feature is available in the My Emails interface only.

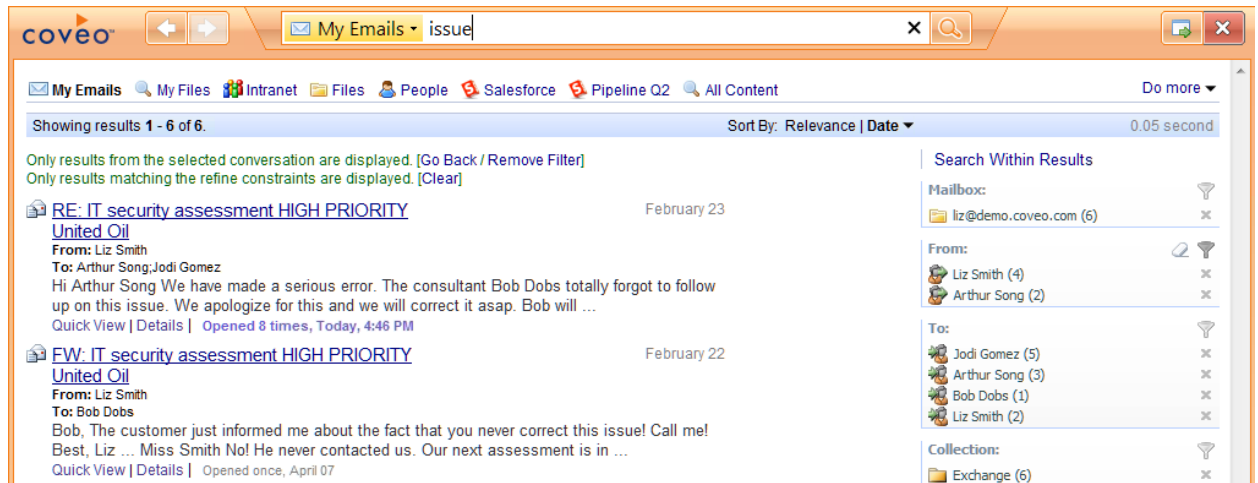
For more information on how to search within results in general, see *Searching Within Results* on page 13.

### To search within a specific series of e-mail messages:

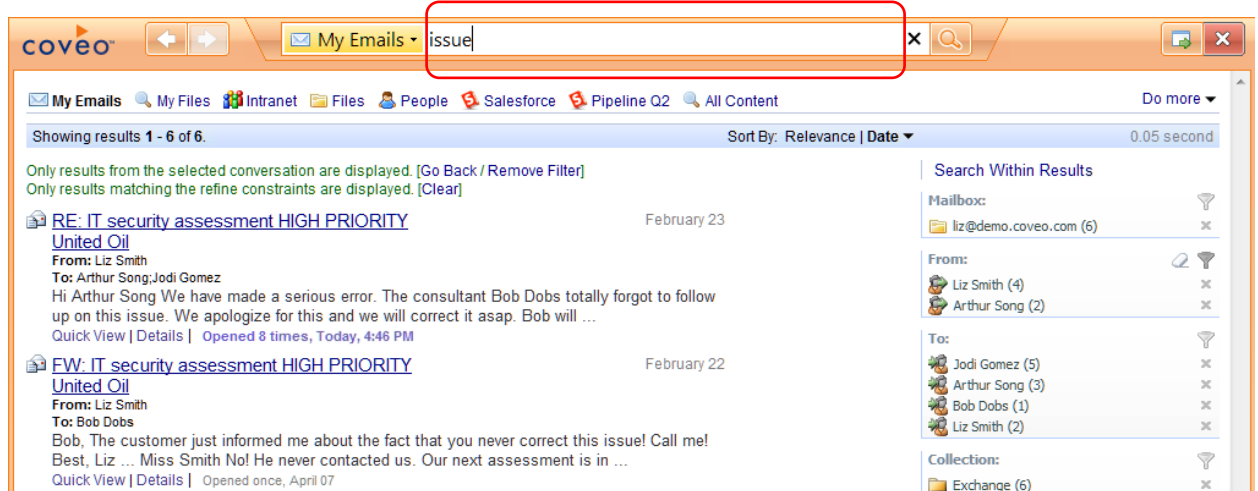
1. Under the series of messages for which you want to see all the related entries, click **Search in Conversation**.

The screenshot shows the Coveo My Emails interface. The main content area displays search results for 'United Oil & Gas Corp. [United Oil SLA] Opportunity'. The email body text includes: 'Hi Arthur Song We have made a serious error. The consultant Bob Dobs totally forgot to follow up on this issue. We apologize for this and we will correct it asap. Bob will ...'. A red box highlights the text 'Search In Conversation' in the email body. The right sidebar shows the 'Search Within Results' panel with filters for Mailbox, From, To, and Collection. The 'From' filter is expanded, showing results for Liz Smith (2,390), Bob Dobs (23), Arthur Song (2,136), Liz D Cruz (2,100), and Stella Pavlova (2,111). The 'To' filter is also expanded, showing results for Liz Smith (22,304), Arthur Song (239), Liz D Cruz (234), Bob Dobs (34), and Jane Lewis (5). The 'Collection' filter shows Exchange (23,281) and Enterprise Vault (602).

The application displays the filtered results.



2. If desired, refine the results (see *Searching Information Using Simple Criteria* on page 6 and *Building a Filter with Multiple Criteria* on page 19).
3. In the search box, enter the desired expression.



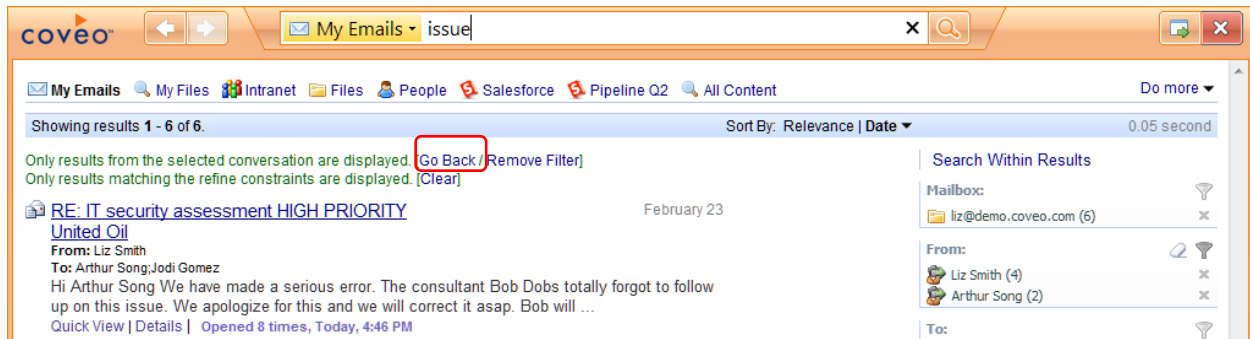
4. Click the magnifying glass at the right of the search entry box to launch the search.

**Note: You can also press ENTER from your keyboard.**

The application refreshes the results list automatically.

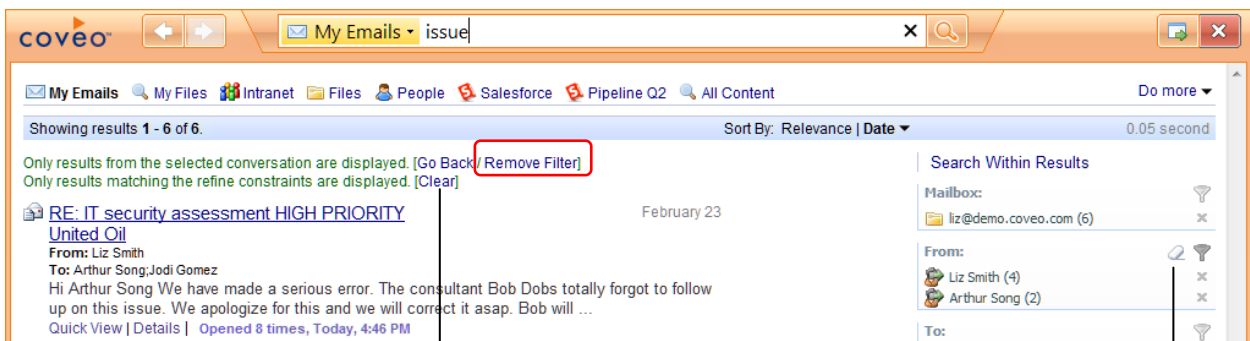
**To view the previous set of results:**

At the top of the results list, click **Go Back**.




**To remove the Search in Conversation filter:**

At the top of the results list, click **Remove Filter**.



To clear all selections and exclusions made to all facets

To clear all selections and exclusions made to the corresponding facet

**Note:** Removing the Search in Conversation filter will not clear any selections or exclusions that you may have made to facets. To clear the selections or exclusions made to a specific facet, click the  icon. To clear all selections and exclusions made to all facets, click Clear.

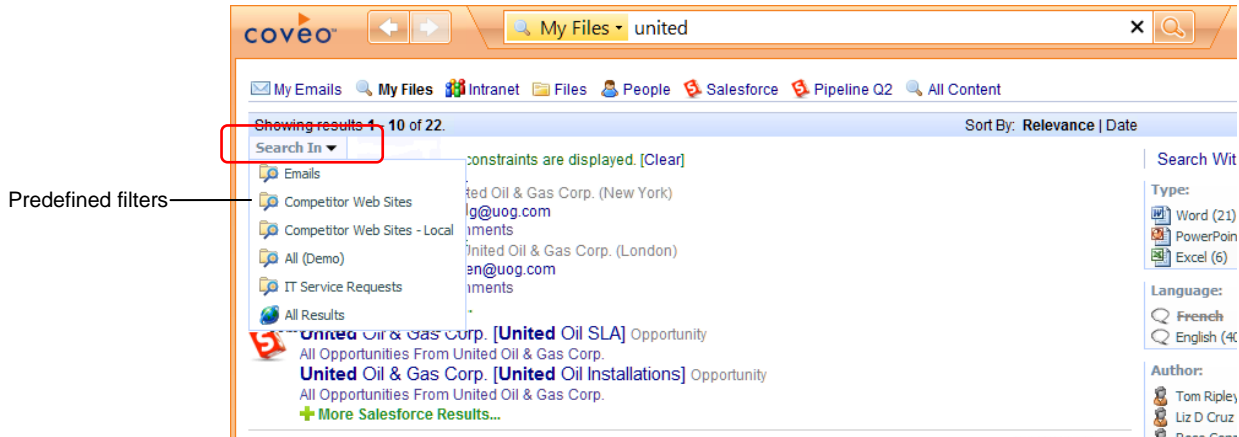
The application refreshes the results list according to the keyword appearing in the search box.

## Using Predefined Filters

Your system administrator might have defined filters to help you retrieve results quickly (for example, e-mail messages from a given group). When those filters are available, the **Search In** list will be displayed on your screen, just under the number of results.

### To use predefined filters:

1. From the main window, click **Search In**.



2. From the list of predefined filters, click the desired filter.


The application refreshes the results list according to the selected filter.

## Building a Filter with Multiple Criteria

One of the main features of the Desktop Searchbar is the possibility to quickly build filters including several criteria. This could be particularly useful, for example, if you want to view only the documents written by specific people. You could then select only the desired names from the list, and the application would automatically adjust the results list according to your filter.

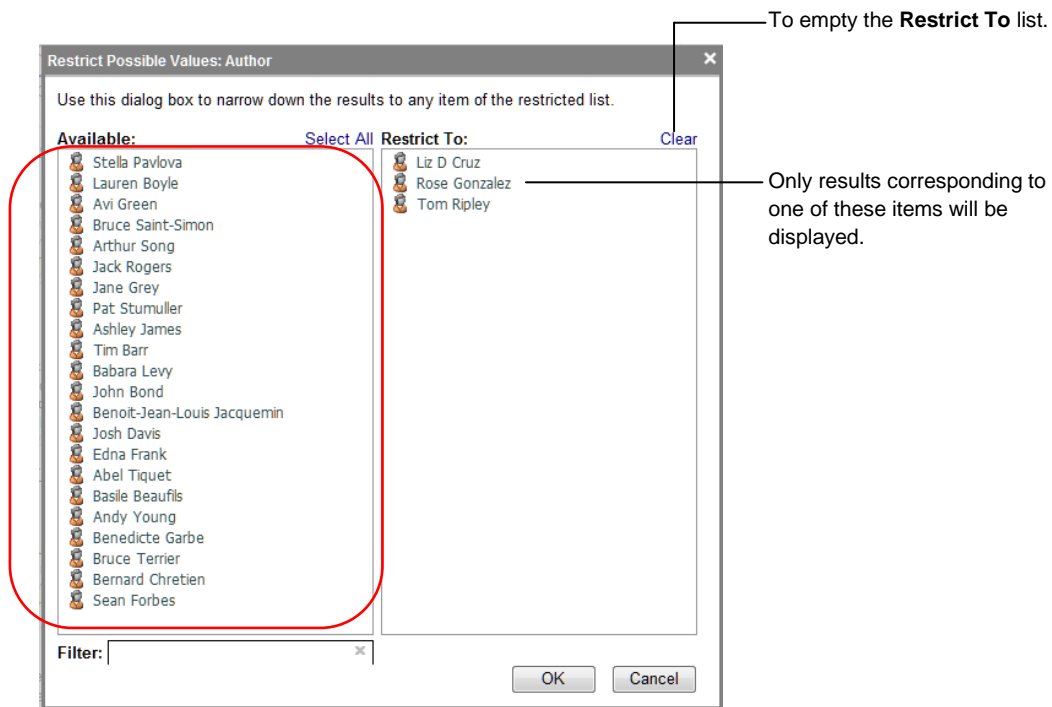
You can build as many filters with multiple criteria as there are available facets. You can modify existing filters or remove them as needed.

### To build or modify a filter with multiple criteria:

1. If you want to modify an existing filter, go directly to step 2; otherwise, launch a search (see *Searching Information Using Simple Criteria* on page 6).
2. Click the  icon next to the facet containing the criteria that you want to use to restrict your search.

The screenshot shows the Coveo Desktop Searchbar interface. The search bar at the top contains the text "My Files" and "United". Below the search bar, there are navigation tabs for "My Emails", "My Files", "Intranet", "Files", "People", "Salesforce", "Pipeline Q2", and "All Content". The search results are displayed in a list view, showing "Showing results 1 - 10 of 558." and "Sort By: Relevance | Date". The results include entries for "Arthur Song", "Avi Green", and "United Oil & Gas Corp. [United Oil SLA] Opportunity". On the right side, there is a "Search Within Results" panel with facets for "Type", "Language", and "Author". The "Author" facet is highlighted with a red box, and the funnel icon next to it is also highlighted with a red box.

- From the **Available** list, click each criterion (item) that you want to include in your filter.



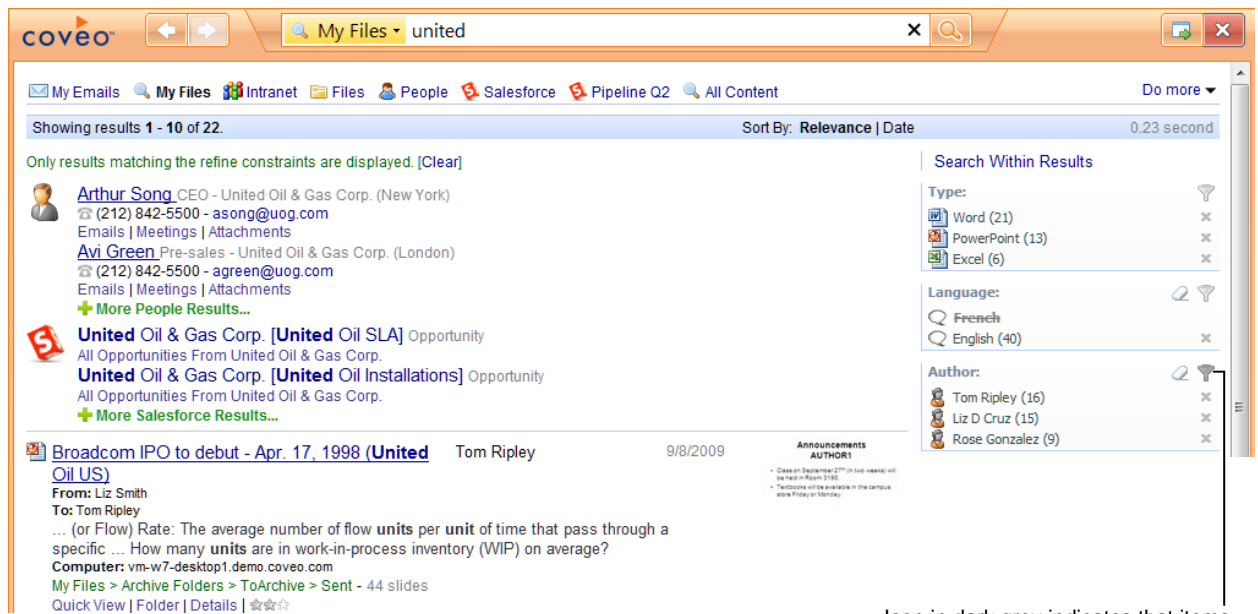
The selected items are transferred to the **Restrict To** list on which the filter will be based.

**Note:** You can use the Filter box to help you find a specific item more quickly. The application automatically adjusts the list as you type. Once you have found the desired item, simply click it to include it in your filter.

**Note :** If you want to remove criteria, from the Restrict To list, click each item that you no longer want in your filter.

- When your criteria are all selected, click **OK**.

The results list is refreshed according to your new filter.

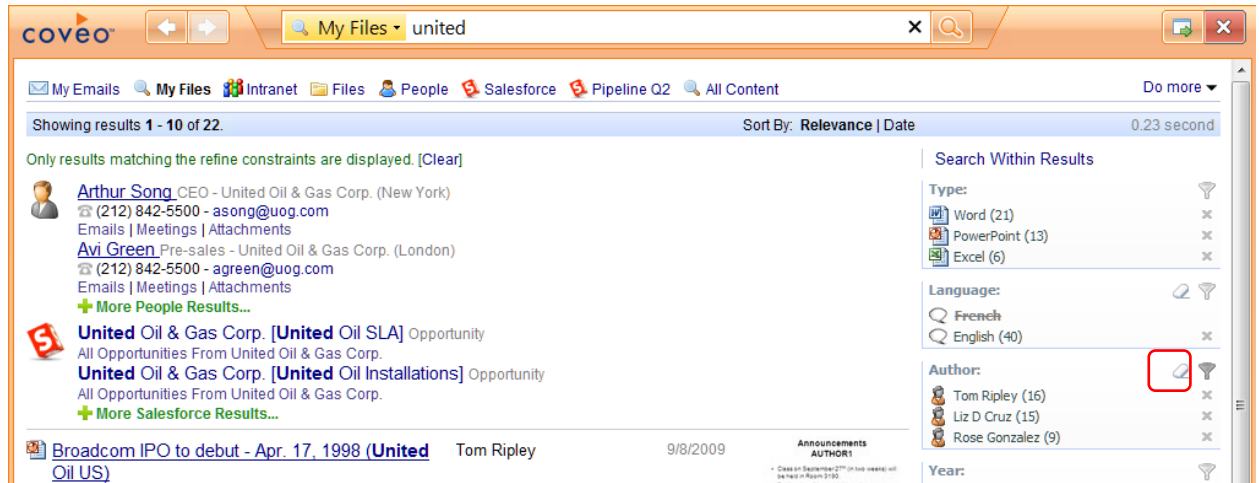


Icon in dark grey indicates that items of the facet have been filtered

- Repeat the steps above for all the filters that you want to build.

**To remove a filter with multiple criteria:**

Click the  icon next to the facet corresponding to the filter that you want to remove.



The filter is automatically removed and the results list is refreshed accordingly.

## Performing Searches in Separate Windows

Sometimes, you may want to perform different searches and view the results in their own windows. You can isolate as many search windows as you want from the Desktop Searchbar.

**Note: A search box will remain available in each window to enable you to launch new searches.**

### To perform searches in separate windows:

1. Open the Desktop Searchbar. For more information, see *Displaying or Hiding the Desktop Searchbar* on page 39.
2. Enter the desired expression in the search entry box. For more information on the supported operators that you can use, see *Understanding the Most Common Search Operators* on page 11.



3. Click the magnifying glass at the right of the search entry box to launch the search.

**Note: You can also press ENTER from your keyboard.**

4. Click the window separation button.



OR

Click anywhere on the title bar (outside the Desktop Searchbar area) and drag the window at the location of your choice on your screen. As soon as you release the mouse button, the window becomes independent from the Desktop Searchbar.

5. Repeat the steps above with all the independent search windows that you want to create.

## Rating Documents and Items

In interfaces such as My Files, People and Intranet, it is possible to rate documents and items to reflect their relevancy. There are two types of rating: collaborative and personal.

- Collaborative rating: Represented by grey stars (☆☆☆ - 1 to 3 stars). Corresponds to an *average of the appreciations* given to each document by the other users in your organization. The application uses this average to fine-tune ranking. Since the collaborative rating is an average, you cannot modify this value directly.

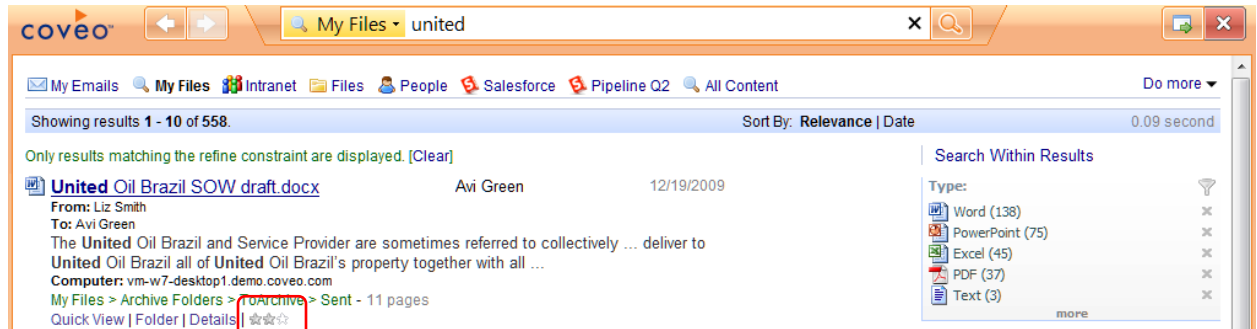
Because this process is performed independently for each user group, it tailors ranking to different types of users (for example, the collaborative rating used to rank documents for a Human Resource consultant is different from the one used for a software developer).

- Personal rating: Represented by yellow stars (☆☆☆ - 1 to 3 stars). Corresponds to the appreciation that you assign to a document to reflect its relevancy. This appreciation is used to calculate collaborative rating and personalize the ranking of results. The personal rating prevails on collaborative rating, which means that, once you have rated a document, its collaborative rating score will no longer be taken into account during the ranking process.

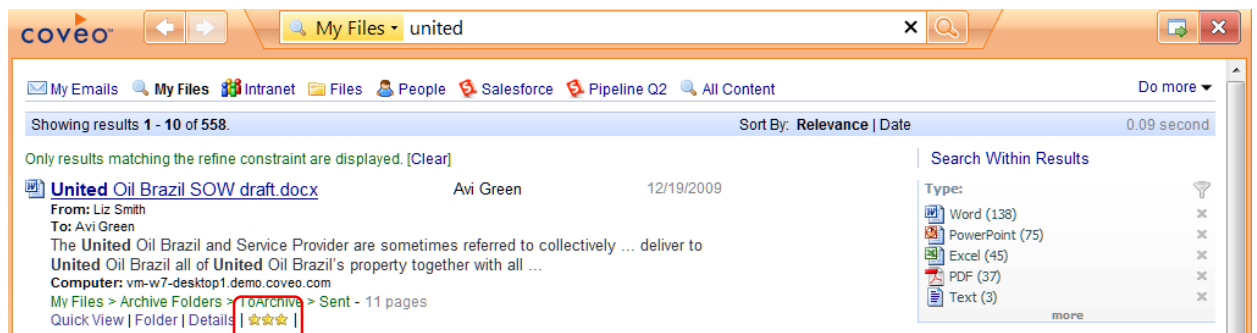
You can remove the personal rating on documents and items, but not the collaborative rating. To be able to modify the personal rating of an already-rated document, you must remove its rating first.

### To rate documents and items:

Under the document or item that you want to rate, click the desired number of stars.



The new personal rating is shown immediately.



### To remove personal rating from documents or items:

Right-click the yellow stars under the document or item for which you want to remove the rating.

The application displays the collaborative rating for this document or item automatically.

## Understanding the Quick Views and Cached Documents

A Quick View is an HTML copy of a document or message that the application keeps in memory, which allows to speed up document access and reading. Quick Views take less time to open than actual documents (because they are already in memory). A cached document is similar to a Quick View with the difference that Quick Views are created by *converting documents to HTML format*, whereas, cached documents are *native HTML* documents.

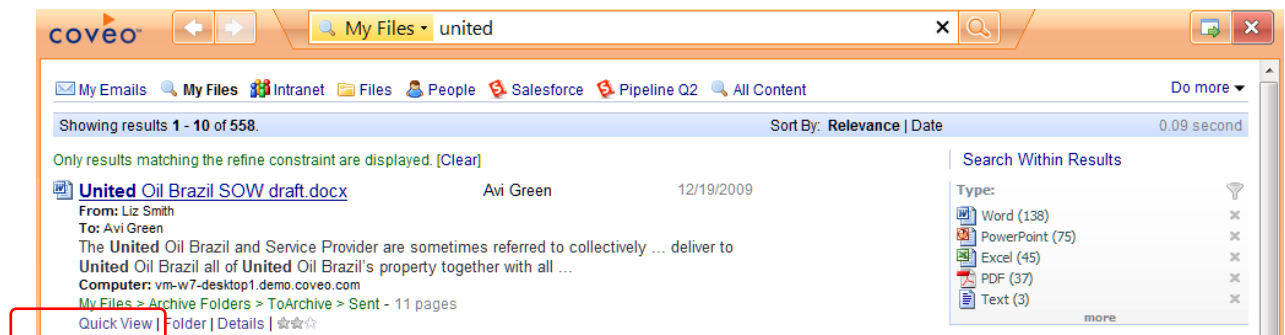
In the Quick Views and cached documents, the search keywords are highlighted and you can easily navigate through the occurrences of these keywords in the document or message.

From the Quick View or Cached window, you can also:

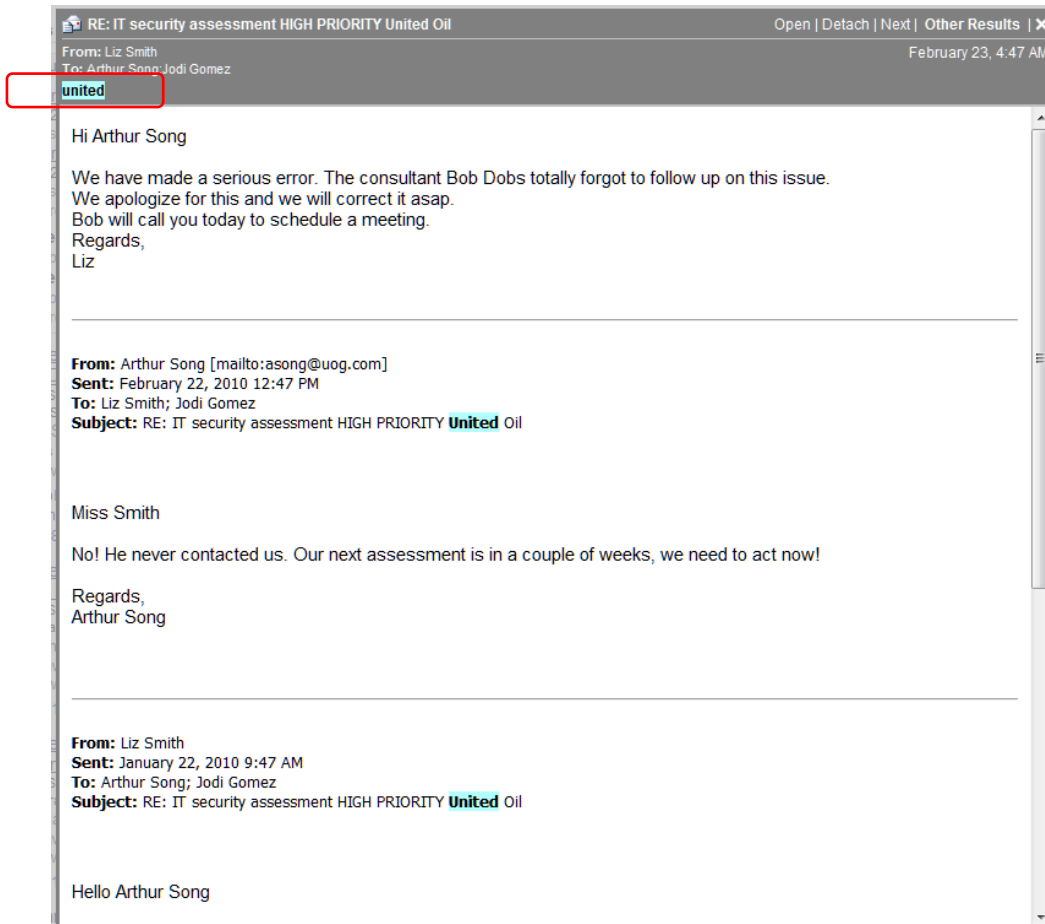
- Open the original document or message (if you have the appropriate user rights).
- Open (detach) a copy of the document or message in a Web browser to access features such as printing.
- Navigate through the results (go to previous or next result displayed in HTML).
- Display the complete list of results and open a specific item (in HTML format).

### To navigate through occurrences of keywords in a Quick View or a cached document:

1. Under the document or item for which you want to display the Quick View or cached version, click **Quick View** (or **Cached**).



2. Click the highlighted keywords located at the top of the window to go to the first occurrence of this expression in the document or message.



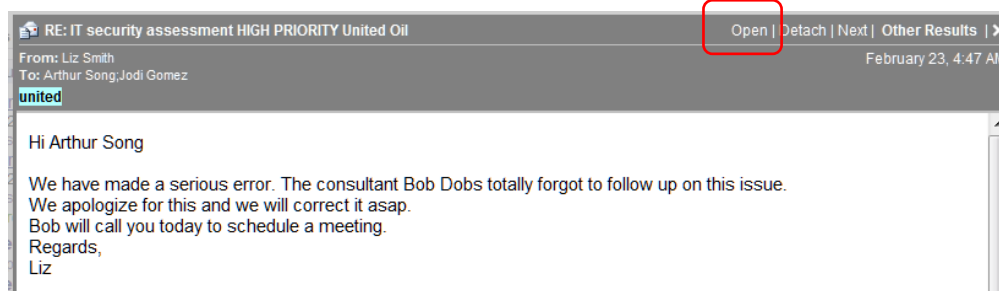
3. Click as many times as needed to navigate through the document or message.

OR

With your mouse, scroll up or down as needed to navigate through the document or message.

### To open the original document or message:

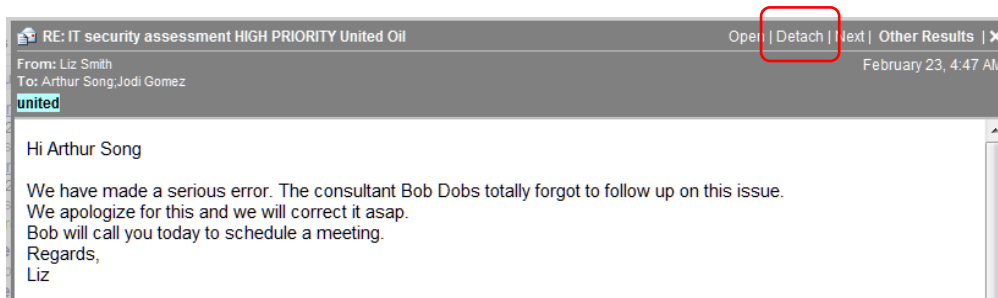
From the *Quick View* or *Cached* window, click **Open**.



The message or document opens if you have the appropriate user rights.

### To open (detach) a copy of the document or message in a Web browser:

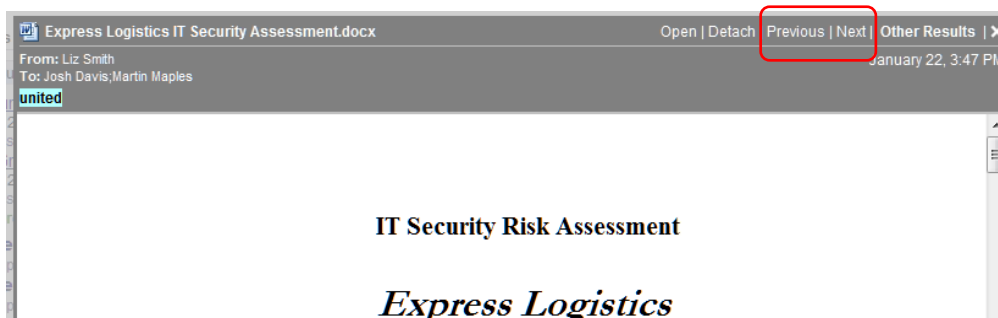
From the *Quick View* or *Cached* window, click **Detach**.



The application displays the HTML version of the document or message in your Web browser.

### To navigate through the results (in HTML format):

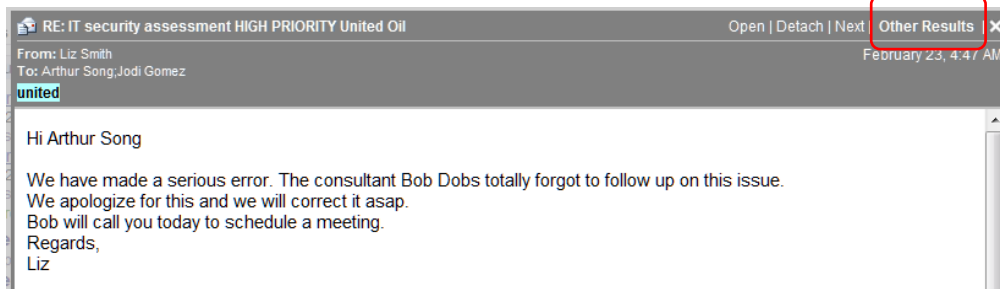
From the *Quick View* or *Cached* window, click **Previous** or **Next**.



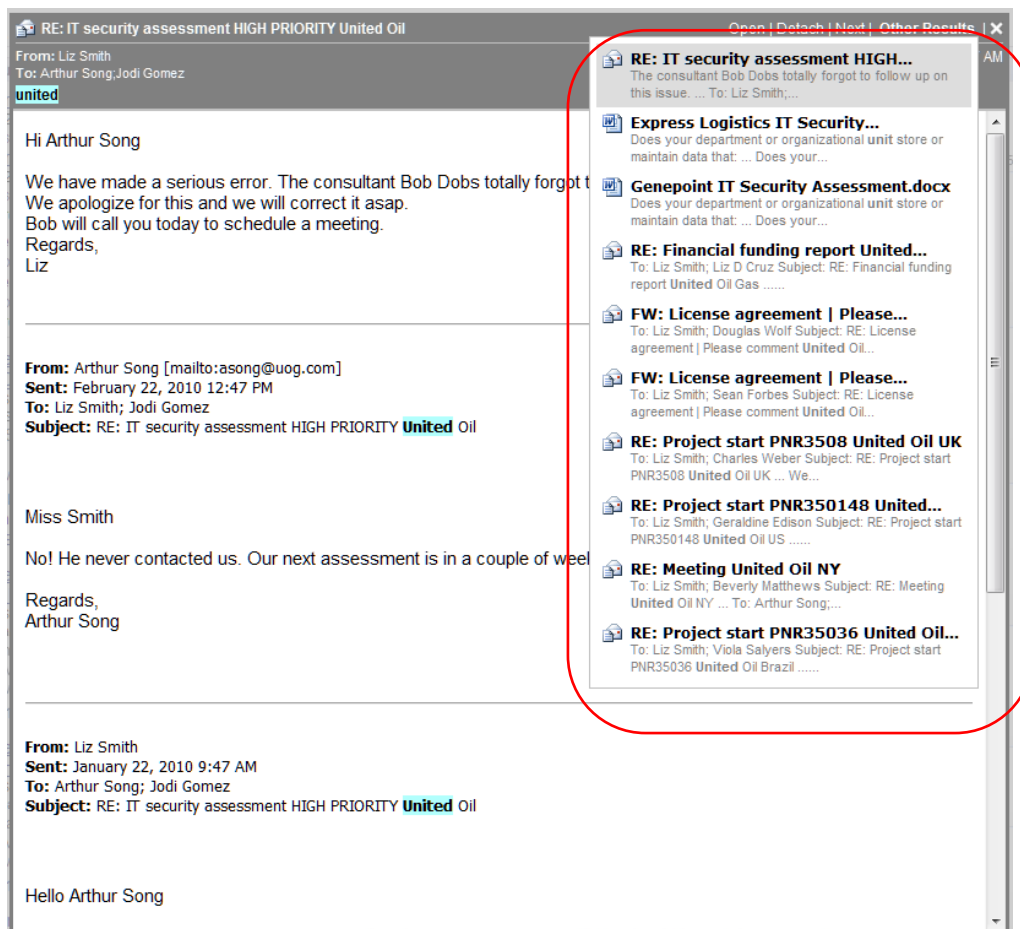
The application displays the HTML version of the corresponding document or message.

**To open a document or message from the list of results (in HTML format):**

1. From the *Quick View* or *Cached* window, click **Other Results**.



2. From the displayed list, select the document or message that you want to view.



The application displays the HTML version of the corresponding document or message.

## Viewing all Documents Related to a Specific Message

You can view all the documents associated with a specific message. These documents could have been either attached to the message or inserted in its body (in the case of images). When the selected message is part of a series of messages in which several documents have been exchanged, the application will list all the messages with their attachments.

You can rate the shared documents (see *Rating Documents and Items* on page 24).

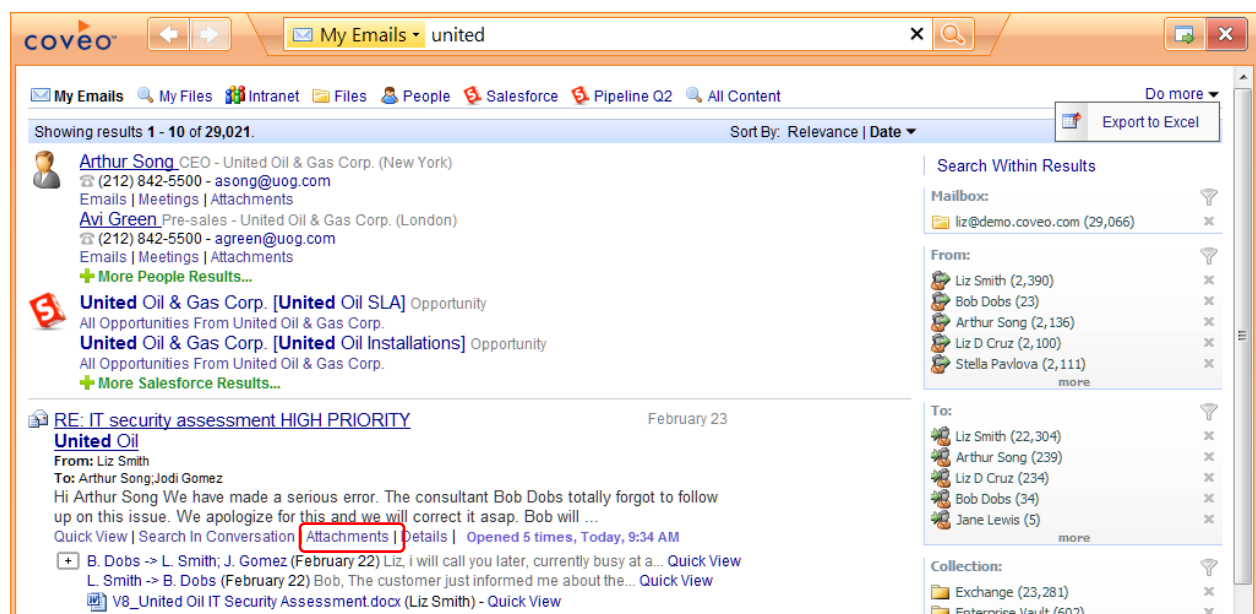
You can also perform a more “in-depth” search in the shared documents when applicable (the application cannot look for keywords in image files). The *search in attachments* “filter” will be applied to all searches that you perform until you remove it. You can view the previous set of results or remove the *search in attachments* filter at any time.

You can still use refinement filters (selections, exclusions, filters with multiple criteria filters).

By default, this feature is available in the My Emails and People interfaces.

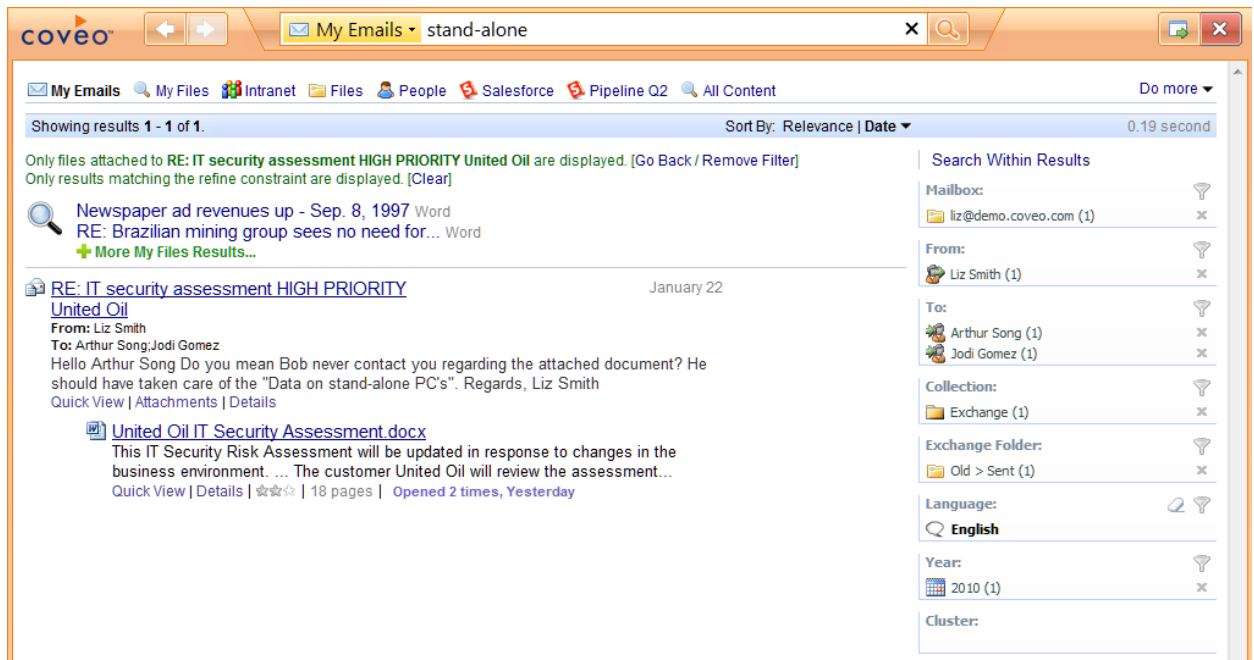
### To view all documents related to a specific message:

1. Under the document or item for which you want to see all the shared documents, click **Attachments**.



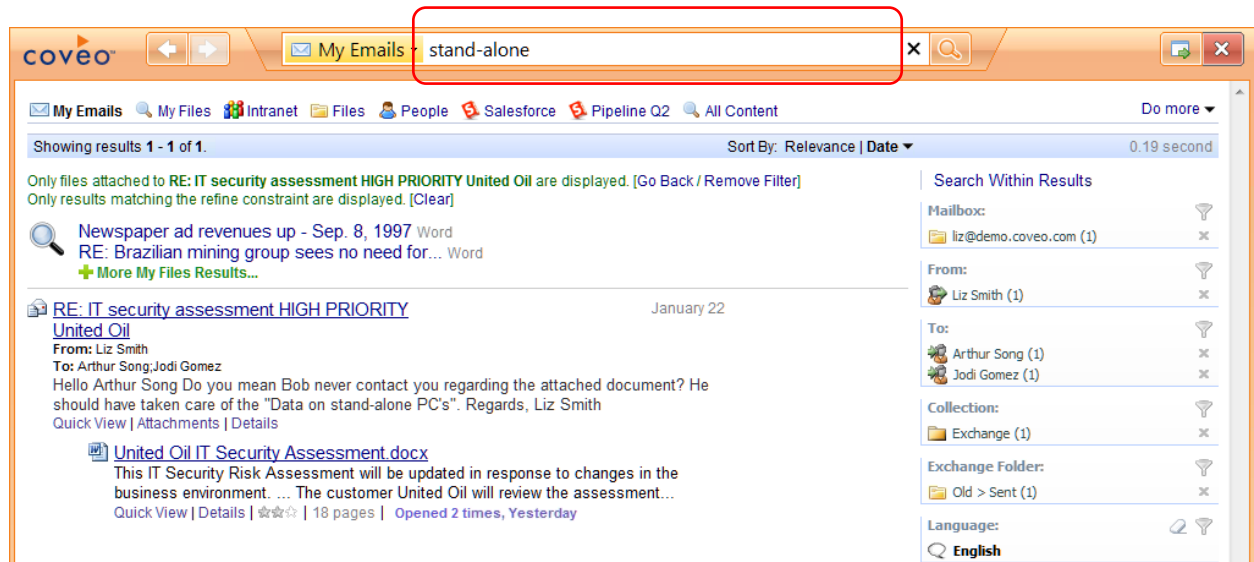
**Note:** If you do not wish to rate the shared documents, use refinement filters, or perform an advanced search on them, you do not have to open the Attachments window. In this case, you can simply click the desired document to open the original. You can also click Quick View to open the HTML version (see *Understanding the Quick Views and Cached Documents* on page 26).

The application displays the message or series (thread) of messages and the corresponding shared documents.



If desired, refine the results (see *Searching Information Using Simple Criteria* on page 6 and *Building a Filter with Multiple Criteria* on page 19).

2. If desired, in the search box, enter an expression to search within the attachments to help you retrieve specific documents.



3. Click the magnifying glass at the right of the search entry box to launch the search.

**Note:** You can also press **ENTER** from your keyboard.

The application refreshes the results list automatically.

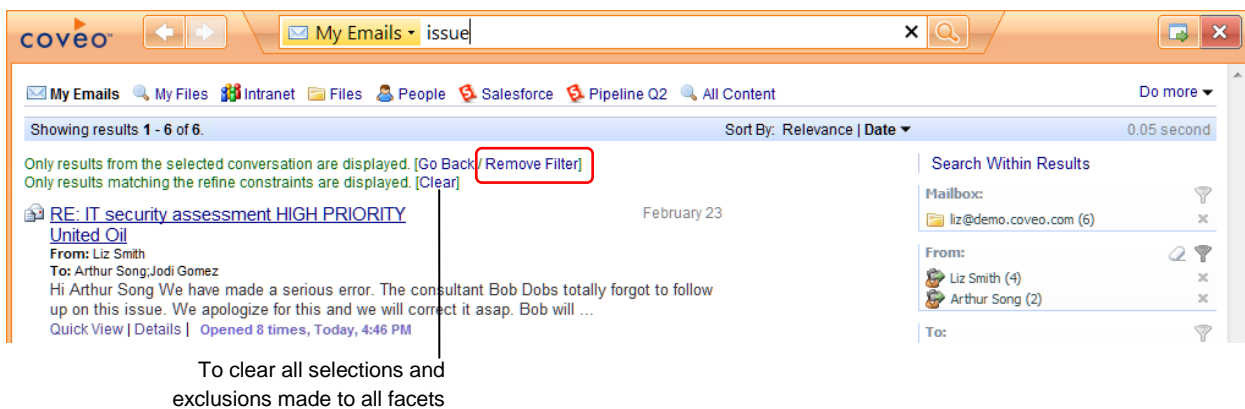
### To view the previous set of results:

At the top of the results list, click **Go Back**.



### To remove the *search in attachments* filter:

At the top of the results list, click **Remove Filter**.



**Note:** Removing the search in attachments filter will not clear any selection or exclusions that you may have made to facets. To clear the selection or exclusions made to a specific facet, click the icon. To clear all selections and exclusions made to all facets, click **Clear**.

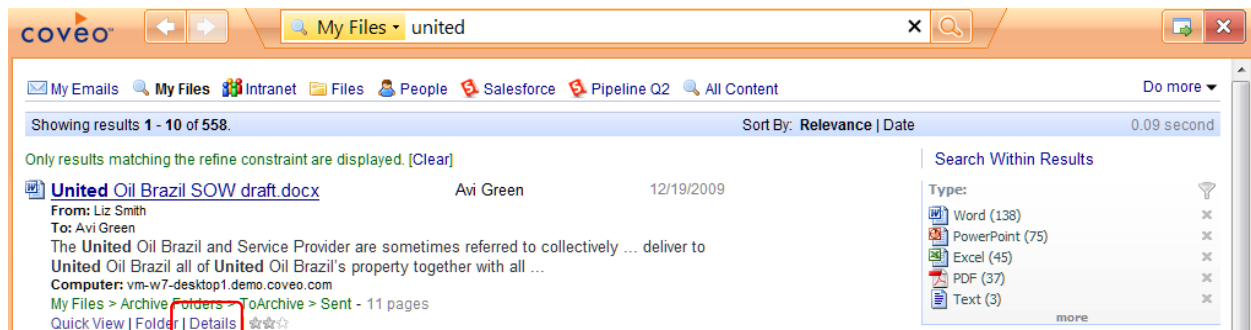
The application refreshes the results list according to the keyword appearing in the search box.

## Viewing the Summary of a Message or Document

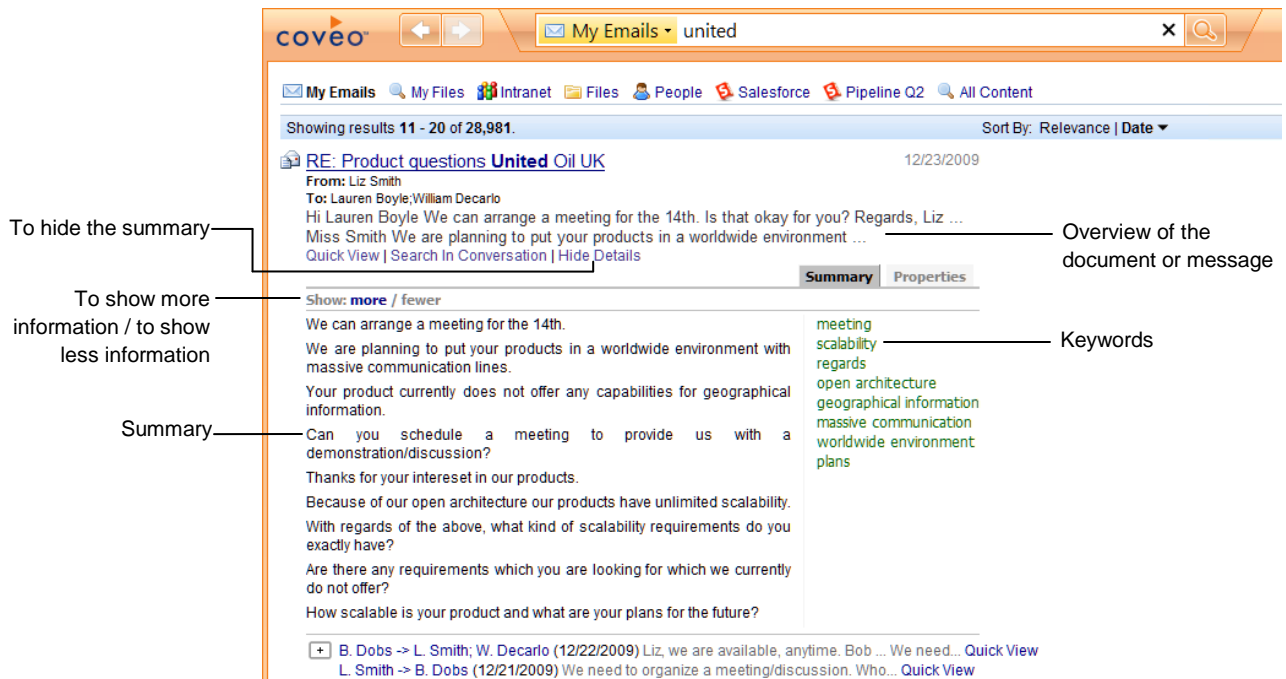
You can view, in plain text (without tables or images), key sentences and lists of concepts related to a message or document when available. Summaries are more precise than overviews and more concise than actual documents. They can give you a good idea of the content of a document. Since the application cannot look for keywords in image files, no summary will be available for such files.

### To view the summary of a message or a document:

Under the document or item for which you want to view the summary, click **Details**.



The application displays the summary.

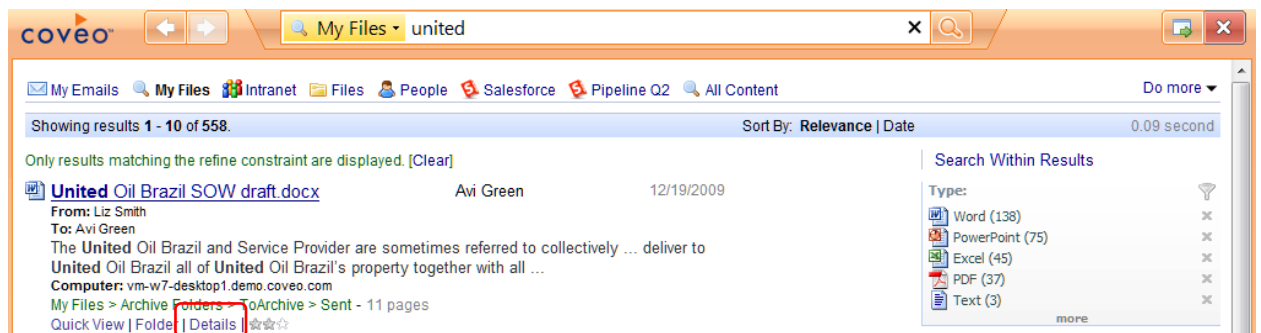


## Viewing the Properties of a Message or Document

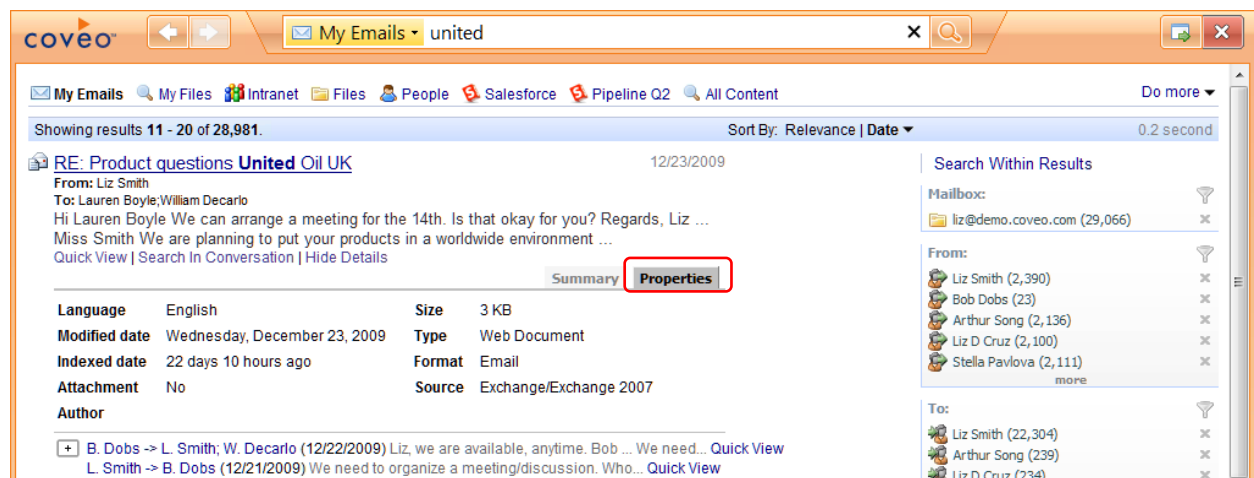
You can view the properties of a message or a document such as the language in which the message or document is written, the modification date, the size of the message or document, the author, etc. The availability of the information depends on the type of message or document that is selected.

### To view the properties of a message or a document:

1. Under the document or item for which you want to view the properties, click **Details**.



2. Select the **Properties** tab.



The application displays the properties.

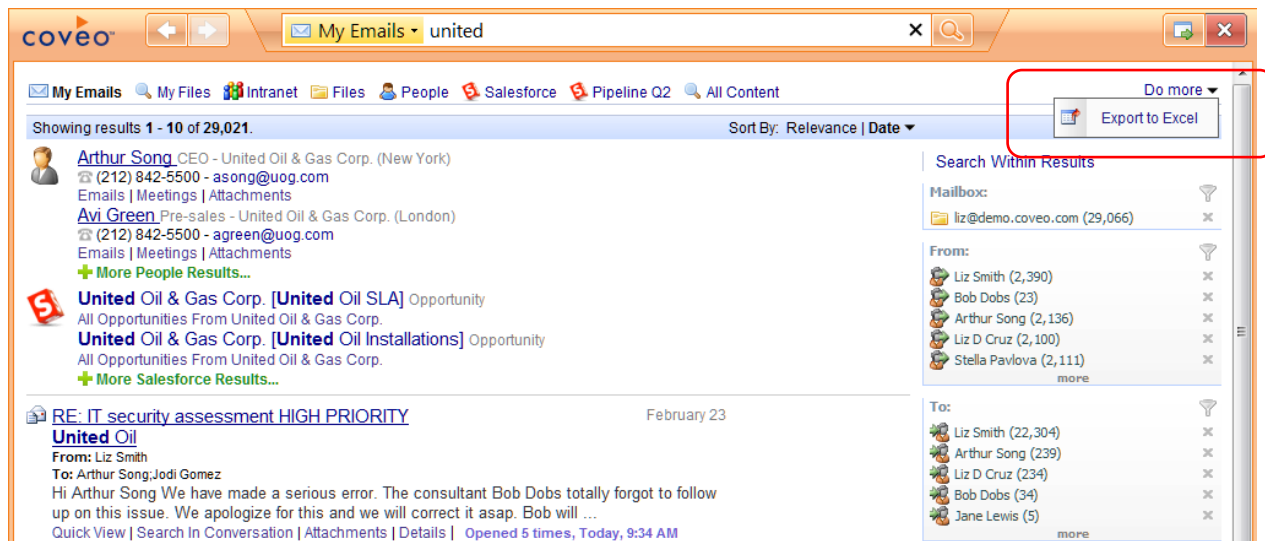
## Exporting Search Results to Microsoft Excel

You can export search results to an Excel spreadsheet. You can open the file with Microsoft Excel 97 or later (thanks to the Excel 97-2003 file format). When the export feature is available, it will appear under **Do More** on the main window.

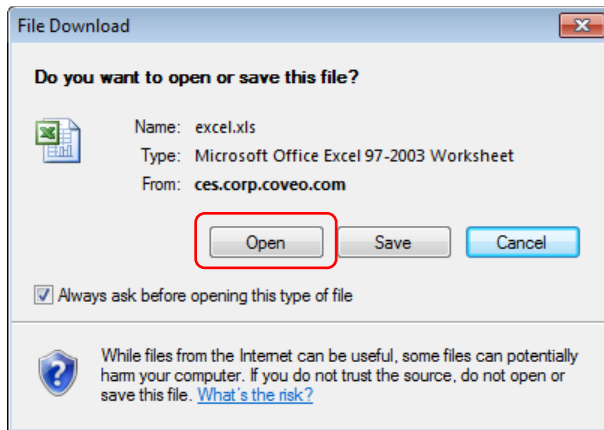
The content of the exported file will vary according to the configuration that your system administrator will have defined (CES only).

### To export search results to Microsoft Excel:

1. Perform your search and filter the results as you want.
2. Select **Do More > Export to Excel**.

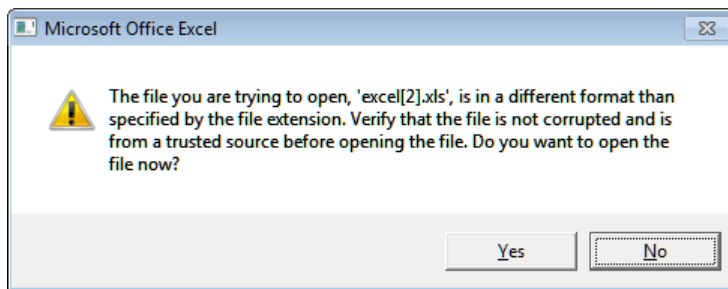


- When the application prompts you, click **Open**.

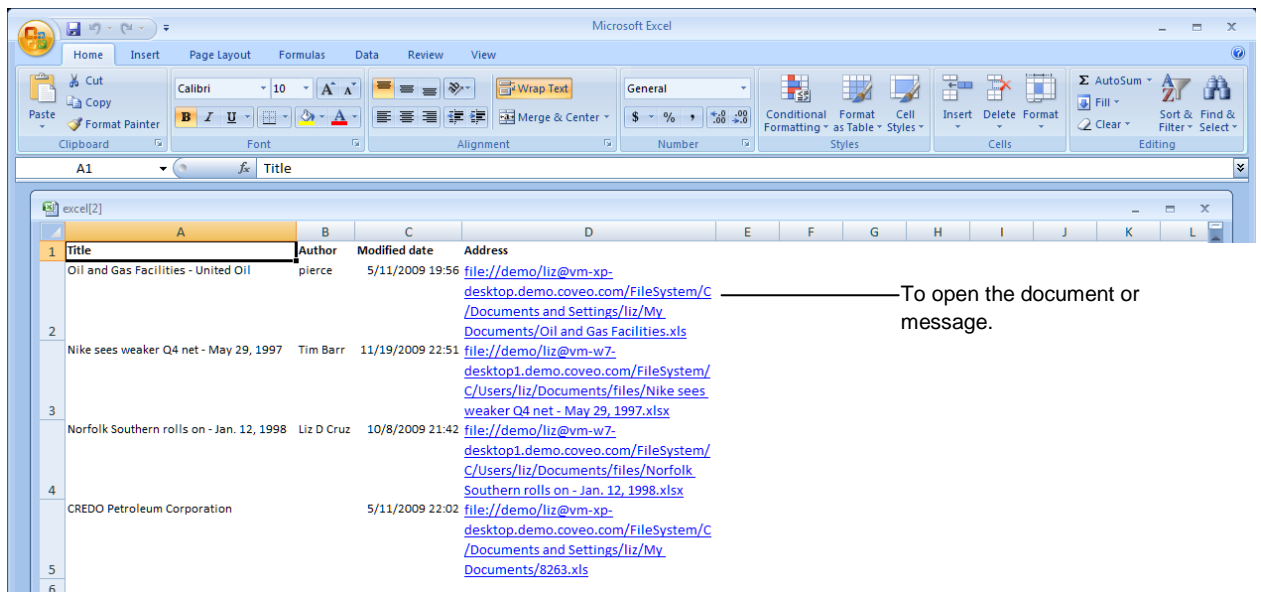


**Note:** If you prefer, you can also save the file at this time by clicking **Save**.

- When the application prompts you, click **Yes**. The file has a special format to ensure that it will be interpreted correctly by many versions of Microsoft Excel.



- The list of results is displayed.



- Save the file to a location of your choice.

## Modifying the Keyboard Shortcut to Open the Desktop Searchbar

Even when you are working in Outlook, you can open the Searchbar at any time (for more information, refer to the user manual of the Outlook Sidebar available on our Web site at [www.coveo.com/go?dest=outlooksidebarintro](http://www.coveo.com/go?dest=outlooksidebarintro)).


By default, the keyboard shortcut (hotkey) to open the Searchbar is the combination of the Windows logo key and the C letter key (Win+C). However, you can modify this keyboard shortcut for any of the following combinations:

- SHIFT key and any letter
- CTRL key and any letter
- Windows logo key and any letter
- ALT key and any letter

### To modify the keyboard shortcut used to open the Desktop Searchbar:

1. In Outlook, from the main menu, select **Coveo > Options**.

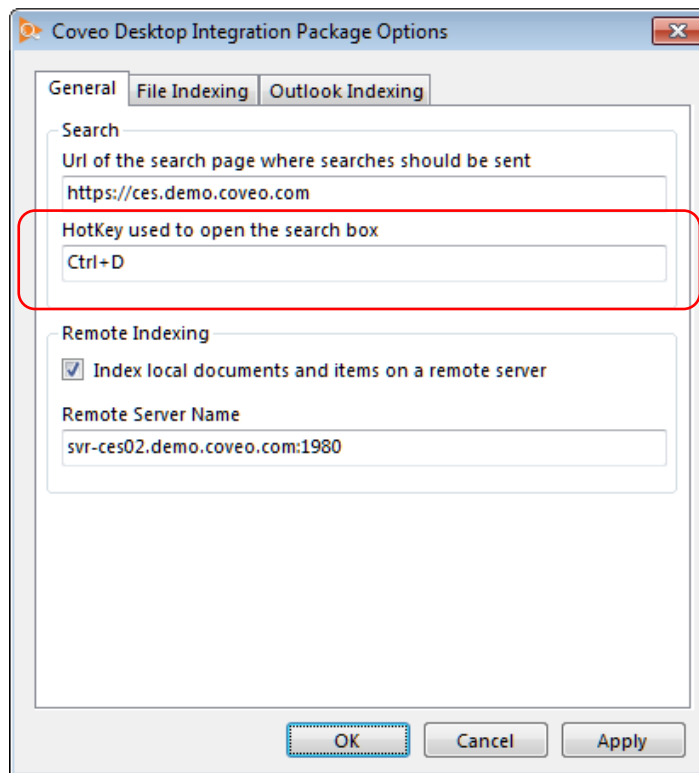
OR

From the taskbar of your computer, right-click the  icon and select **Options**.

2. From the **General** tab, go to the **Hotkey used to open Searchbar** box.

3. Clear the box as follows:

3a. Click just after the displayed text to place your mouse cursor at the right location.



3b. Press BACKSPACE on your keyboard to empty the box.

**Note: There is no other way to empty the box than the one explained above.**

4. On your keyboard, press simultaneously on the two keys that you want to use as the new keyboard shortcut. For example, if you want the new shortcut to be CTRL and D, you would press the CTRL and D keys at the same time.

As soon as you enter a valid combination of keys, it is automatically displayed in the box.

**Note: If the shortcut that you enter is not displayed in the box, it is probably because it corresponds to a reserved keyboard shortcut of Windows. In this case, you will have to select another combination of keys.**

5. Click **Apply** to confirm the changes, and then **OK** to close the window.


## Displaying or Hiding the Desktop Searchbar

Once the *Desktop Integration Package* is installed on your computer, the Searchbar is available automatically from the top of your screen. The Searchbar is minimized and you need to open it before you can start searching.


If you prefer, you can configure the application so that the Searchbar remains hidden by default. You can display it again at any time.

**Note:** *Hiding the Desktop Searchbar will not hide the Outlook Sidebar. For information on how to hide the Sidebar, please refer to the user manual of the Outlook Sidebar available on our Web site at [www.coveo.com/go?dest=outlooksidebarintro](http://www.coveo.com/go?dest=outlooksidebarintro).*

### To display the Desktop Searchbar, use one of the following methods:

- Use the keyboard shortcut. For more information on how to modify the keyboard shortcut, see *Modifying the Keyboard Shortcut to Open the Desktop Searchbar* on page 37.
- Click the corresponding button from the Outlook Sidebar.
- With your mouse, point to the orange line located at the top of your screen.
- From the taskbar of your computer, right-click the  icon and select **Open Search Window**.

### To configure the Desktop Searchbar to be visible or hidden by default:

From the taskbar of your computer, right-click the  icon and select **Show Quick Search Bar**.

This will display a hidden Searchbar and hide a visible one.

## Setting Up the Indexing Parameters

There are several tools that give you more flexibility regarding the indexing process.

### Modifying the Way Local Files are Indexed

By default, the system indexes all the files that are located in the My Documents folder and on Windows Desktop. However, you can configure the system to take into account files that are located in other folders on your computer. You can also exclude specific folders from indexing.

#### To include local files:

1. In Outlook, from the main menu, select **Coveo > Options**.

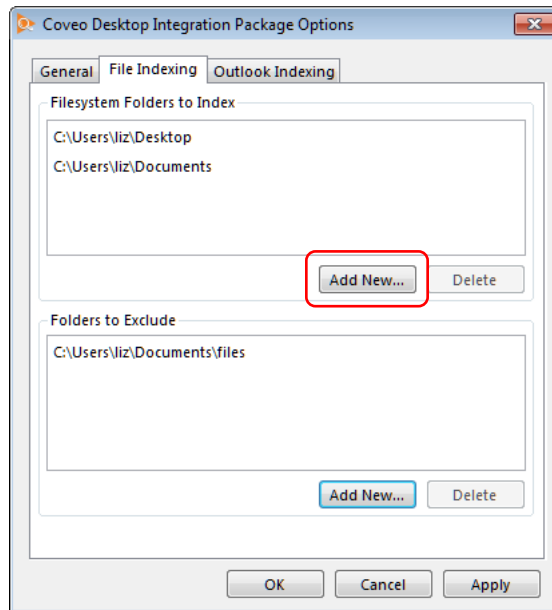
OR

From the taskbar of your computer, right-click the  icon and select **Options**.

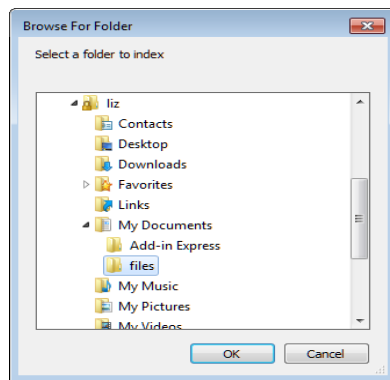
2. Select the **File Indexing** tab.

3. Under **Filesystem Folders to Index**, specify the folders whose content should also be indexed:

3a. Click **Add New**.



3b. Browse through the folders and select the desired folder.




3c. Click **OK** to confirm.

4. Repeat the previous steps for all the folders that you want to add.
5. Click **Apply** to confirm the changes, and then **OK** to close the window.

**To exclude local files:**

1. In Outlook, from the main menu, select **Coveo > Options**.

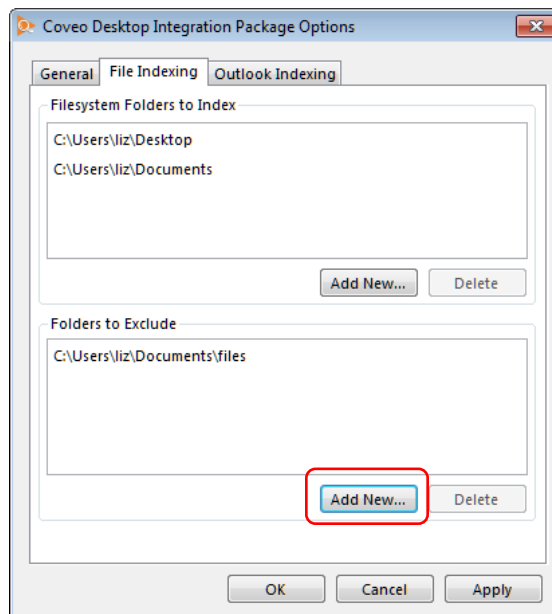
OR

From the taskbar of your computer, right-click the  icon and select **Options**.

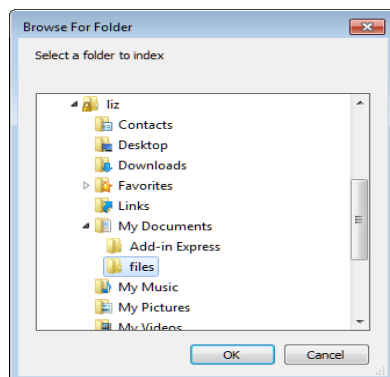
2. Select the **File Indexing** tab.

3. Under **Folders to Exclude**, specify the folders whose content should not be indexed:

3a. Click **Add New**.



3b. Browse through the folders and select the desired folder.



3c. Click **OK** to confirm.

**IMPORTANT** If the same folder appears both on the list of items that you want to index and on the list of items that you want to exclude, the content of this folder will not be indexed.

4. Repeat the previous steps for all the folders that you want to exclude from the indexing.
5. Click **Apply** to confirm the changes, and then **OK** to close the window.

## Indexing Local (Offline) E-mail Messages

Depending on the configuration of your system, e-mail messages can be indexed directly on the Exchange server or not. By default, the local e-mail messages are not taken into account in searches. This means that if the messages are not indexed at the server level, no e-mail messages will be available when you perform a search using the Outlook Sidebar or the Desktop Searchbar. However, you can configure the application to index your local e-mail messages (contained in the *Outlook.ost* file) so that they will become available in the search results.


**IMPORTANT** Indexing local messages that are already indexed on the server (through Exchange) WILL result in duplicate entries in the search results. If you are not sure whether the messages are indexed from the server or not, see with your system administrator.

You can stop indexing the local messages at any time.

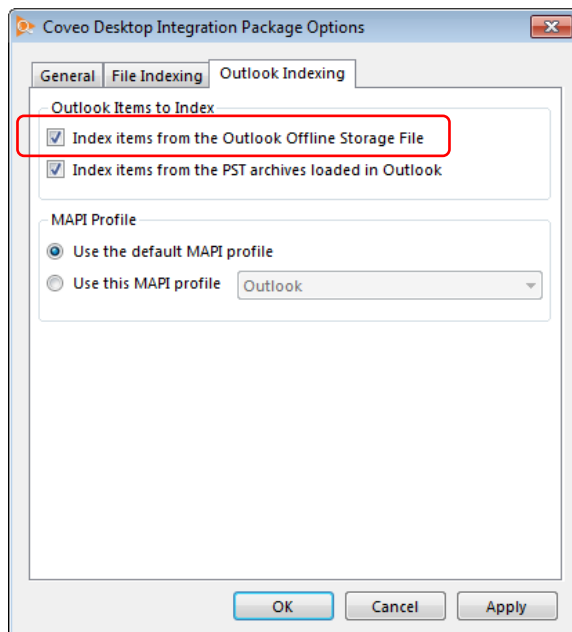
### To index local e-mail messages:

1. In Outlook, from the main menu, select **Coveo > Options**.

OR

From the taskbar of your computer, right-click the  icon and select **Options**.

2. Select the **Outlook Indexing** tab.
3. Under **Outlook Items to Index**, select the **Index items from the Outlook Offline Storage File** check box.



4. Click **Apply** to confirm the changes, and then **OK** to close the window.

### To stop indexing local e-mail messages:

Follow the procedure showing how to index local e-mail messages, except that, at step 3, clear the **Index items from the Outlook Offline Storage File** check box.

## Indexing Archived E-mail Messages

By default, the application indexes all the e-mail messages contained in the Outlook's default archive file (*Archive.pst*) and in the personal archive files (.pst) that are open in Outlook. However, you can exclude all the archive files from the indexing process.

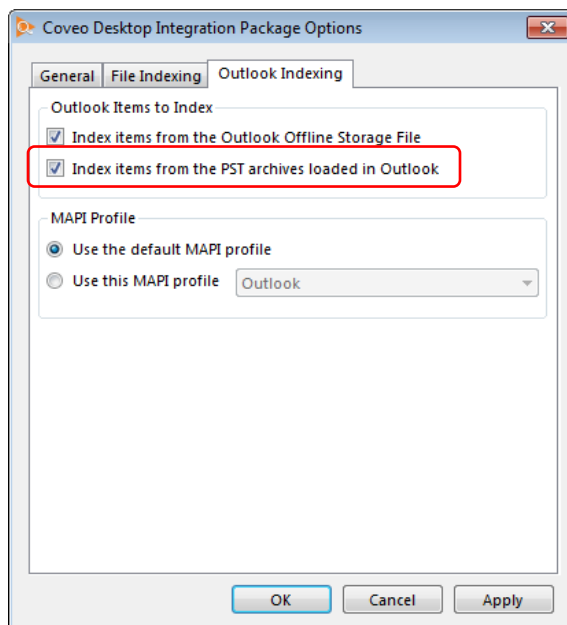
### To index the archived e-mail messages:

1. In Outlook, from the main menu, select **Coveo > Options**.

OR

From the taskbar of your computer, right-click the  icon and select **Options**.

2. Select the **Outlook Indexing** tab.
3. Under **Outlook Items to Index**, select the **Index items from the PST archives loaded in Outlook** check box.



4. Click **Apply** to confirm the changes, and then **OK** to close the window.

### To stop indexing archived e-mail messages:

Follow the procedure showing how to index local e-mail messages, except that, at step3, clear the **Index items from the PST archives loaded in Outlook** check box.


## Selecting a MAPI Profile

All elements related to the management of e-mail messages (creation, sending, saving, indexing) are performed using Messaging Application Programming Interface (MAPI) profiles. For most of the users, the default MAPI profile will be the most appropriate for indexing purposes. However, if you have more than one MAPI profile, you may want to specify which of your profiles you prefer to use for indexing. If you are not sure about the profile you should use, see with your system administrator.

### To select a MAPI profile:

1. In Outlook, from the main menu, select **Coveo > Options**.

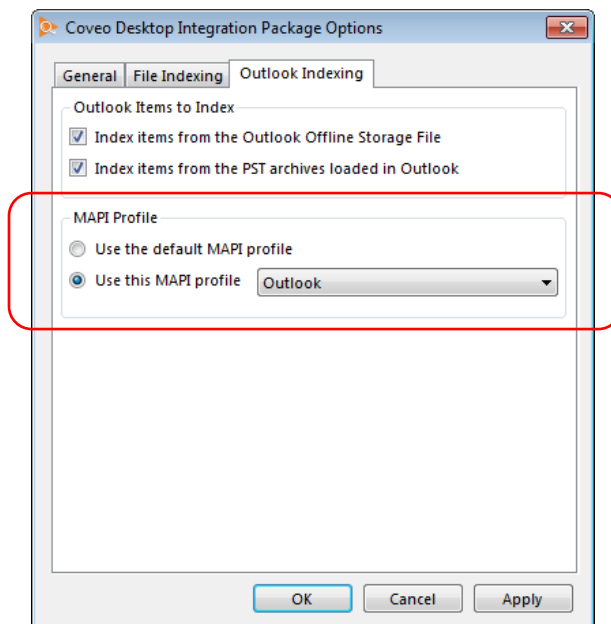
OR

From the taskbar of your computer, right-click the  icon and select **Options**.

2. Select the **Outlook Indexing** tab.
3. Under **MAPI Profile**, select the **Use the default MAPI profile** option.

OR

Select the **Use this MAPI profile** option and specify which profile you want to use from the list.



4. Click **Apply** to confirm the changes, and then **OK** to close the window.

## Maintenance Tasks

### Pausing and Resuming the Indexing Process


Normally, the indexing process is performed through out your work session. Sometimes, you may find useful to pause this process, especially when you are out of the office and only have access to limited bandwidth (for example, slow or pay-per-use Internet connection).

#### To pause the indexing process:

From the taskbar of your computer, right-click the  icon and select **Pause Indexing**.

The process is stopped until you resume it.

#### To resume the indexing process:

From the taskbar of your computer, right-click the  icon and select **Pause Indexing** again.

The process is resumed automatically.

### Rebuilding the Index

**IMPORTANT** To avoid unnecessary processing on the server, you should not rebuild the index yourself unless your system administrator asks you to do so.

#### To rebuild the index:


From the taskbar of your computer, right-click the  icon and select **Rebuild Index**.

# Troubleshooting

## Common Problems

Here is a list of common problems and ways to solve them. If after trying these solutions you still experience some problems, please contact your system administrator.

Problem	Possible Cause	Solution
I am certain that the document I am looking for is in the My Documents folder, but it never shows up on the results list.	<ul style="list-style-type: none"> <li>The My Files search interface is not currently selected.</li> </ul>	<ul style="list-style-type: none"> <li>Select the My Files interface and retry.</li> </ul>
	<ul style="list-style-type: none"> <li>The search criteria are too restrictive.</li> </ul>	<ul style="list-style-type: none"> <li>Modify the criteria so that more results could be displayed.</li> </ul>
	<ul style="list-style-type: none"> <li>The document is too recent and has not been indexed yet.</li> </ul>	<ul style="list-style-type: none"> <li>Retry later.</li> </ul>
	<ul style="list-style-type: none"> <li>The folder has been excluded from the indexing process.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that the folder containing the document you are looking for has not been excluded from the indexing process (see <i>Modifying the Way Local Files are Indexed</i> on page 40).</li> </ul>


<p>When I select some of the search interfaces, I see the following icon:</p> 	<p>There is a communication problem between your computer and the Web site on which you can perform searches:</p> <ul style="list-style-type: none"> <li>The network is down</li> </ul>	<ul style="list-style-type: none"> <li>Contact your system administrator</li> </ul>
	<ul style="list-style-type: none"> <li>Your computer is not connected to the network (locally or via VPN).</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that your computer is connected to the network and that you are logged in on it (locally or via VPN).</li> </ul> <p><b>Note: It is possible that you do not need to connect to the network if the administrator of your system has configured the Web site differently. See with your administrator for any questions.</b></p>
	<ul style="list-style-type: none"> <li>Your computer is not connected to the Internet.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure that the connection to the Internet is working properly.</li> </ul>
<p>When I try searching through e-mail messages, I never get any results, as if none of my messages are taken into account.</p>	<ul style="list-style-type: none"> <li>The My Emails search interface is not currently selected.</li> </ul>	<ul style="list-style-type: none"> <li>Select the My Emails interface and retry.</li> </ul>
	<ul style="list-style-type: none"> <li>The search criteria are too restrictive.</li> </ul>	<ul style="list-style-type: none"> <li>Modify the criteria so that more results could be displayed.</li> </ul>
	<ul style="list-style-type: none"> <li>E-mail messages are not indexed directly on the Exchange server and the application has not been configured to index local e-mails (directly saved on your computer).</li> </ul>	<ul style="list-style-type: none"> <li>Modify the configuration to include local e-mails in the indexed items. For more information, see <i>Indexing Local (Offline) E-mail Messages</i> on page 43.</li> </ul>
<p>I cannot view any e-mail messages from my archive folders in Outlook.</p>	<p>Archive files have probably been excluded from indexing.</p>	<p>Modify the configuration to include archive files in the indexed items. For more information, see <i>Indexing Archived E-mail Messages</i> on page 45.</p>

<p>There is a lot of duplicate e-mail messages in the search results.</p>	<p>Messages are indexed both on the Exchange server and locally on your computer.</p>	<p>Modify the configuration to exclude local e-mail messages from the indexed items. For more information, see <i>Indexing Local (Offline) E-mail Messages</i> on page 43.</p>
<p>I do not want archived messages to be displayed in the search results.</p>	<p>By default, all archive files that are open in Outlook are taken into account during the indexing process, and then are available when you perform a search.</p>	<p>Modify the configuration to exclude archive files from the indexed items. For more information, see <i>Indexing Archived E-mail Messages</i> on page 45.</p>

## Viewing the Index History

This feature enables the administrator to view the log of indexing operations performed on your computer since your last logon (connection) to the network. This is particularly useful to troubleshoot indexing problems that you may encounter.

### To view the index history:

From the taskbar of your computer, right-click the  icon and select **Index History**.

The history window is displayed.

