

Coveo Enterprise Search

How to Backup and Restore an Index

Applies to CES 5 and later

Note: If the user's environment comprises mirrors and slices, contact Coveo's Support team.

Basics

A backup is an insurance copy—these additional copies can be used to restore the original in case of data loss. Backup should be performed either for archiving purposes or safeguarding valuable files from loss, should the active copy be damaged or destroyed.

▶ When to Backup the Index

It is good practice to backup the index occasionally, especially if it contains a lot of documents that are not modified frequently. However, if sources are rebuilt daily, there is no benefit in making a backup copy of all of the files, as rebuilding implies files are deleted and re-indexed. Nonetheless, making a copy of the configuration files is highly recommended. Their default location is `C:\CESx\Config`.

It is possible to use the system schedules to set your index in *Read-only* mode at specific periods or intervals in order to make an unattended backup copy of the files without having to stop the index. Note that users can perform queries while the backup operation is in progress.

▶ Backup Procedure: Preparation Steps

To begin, the index must be in *Read-only* mode or the *Coveo Enterprise Search (CES)* service must be stopped; it is not possible to backup the index files while it is indexing. It is recommended to backup the index while in *Read-only* mode in order for users to be able to perform queries. If not in *Read-only* mode, the files locked by CES will not be copied. Hence, the restore procedure can result in a corrupted index.

How to Backup the Index

To backup the index, copy the files and subfolders of the *CESx* folder in a convenient backup location. In *Read-only* mode, the files from the *Temp* subfolder are used by the index as a temporary cache for user queries and are not required to perform the backup copy.

Important: Do not copy the files and subfolders of the *CESx* folder in the *Temp* subfolder as it contains the temporary files which are locked by CES.

How to Restore the Index

Important: To restore the index files, the CES service must be stopped. It is not possible to restore a backup copy while indexing or if in *Read-only* mode, as it can result in a corrupted index.

Prior to restoring an index, it is mandatory to delete the existing data. Otherwise, the transactions generated by the current index will remain in the subfolder while the new index files are being copied. The

indexer will try to apply these transactions later on, and that can result in a corrupted index. Thus, simply delete the files and folders under *CESx*.

Once this is done, restore the backup files in *CESx* and start the CES service. It will restart using the restored backup copy.

How to Backup the Configuration Files

A backup scenario involves backing up the configuration files only. Restoring a configuration-only backup requires rebuilding all the sources after the restore. The preparatory procedure to backup configuration files is the same as for the index: the index must be in *Read-only* mode or the CES service must be stopped.

The configuration files are located in the *Config* folder. To back them up, simply copy them to a different location. To restore them, refer to the [How to Restore the Index](#) section.