



Coveo Enterprise Search

Migration Guide

CES 5 to CES 6.0

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Coveo Enterprise Search (CES) 6.0 is the first commercially-viable enterprise search solution for today's complex data environments. It provides unbiased, secure information access for all documents and structured data stored in file systems, email servers, intranets, enterprise applications, databases, and Web sites. Based on industry standards, offering an award-winning combination of security, accuracy, and unrivaled user experience, CES presents the best value in the marketplace.

This document reviews global migrations steps required to port CES 5 to CES version 6.0:

- **CES 6.0 is a new and improved version:** CES 6.0 runs as a separate application; therefore an existing CES 5 installation is not automatically updated. Migration steps are required in order to port the CES 5 setup to CES 6.0.
- **Application migration scenarios:** Each migration scenario section contains instructions for the Typical, Front-end/Back-end and Mirror setup types. The different migration scenarios are:
 - ▶ **Scenario 1—Uninstall CES 5:** This scenario is the easiest as you simply install CES 6.0 without conflicts.
 - ▶ **Scenario 2—CES 5 and CES 6.0 Side-by-Side:** CES 5 and CES 6.0 can coexist for migration purpose; however, it requires more resources from the server.
 - ▶ **Scenario 3—Remove CES 5 when using *SharePoint 2007***
 - ▶ **Scenario 4—CES 5 and CES 6.0 Side-by-Side with *SharePoint 2007***
- **Index Configuration Migration scenarios:** CES 6.0 uses a new index format that improves format and scalability. Due to these changes, it is not possible to import an index from CES 5.0 to CES 6.0. It is necessary to rebuild it in CES 6.0; however, it is possible to import the index configuration from CES 5.0 to CES 6.0 in order to keep all index settings.

Application Migration

Scenario 1—Uninstall CES 5

Typical Setup

A typical setup is a single server installation without *ASP.NET* customizations. Migration of a typical setup can be done by executing the following procedure:

1. Uninstall CES 5. When asked, select to keep the index content of CES 5.
2. Install CES 6.0 by launching the CES 6.0 setup. Once the installation is complete, the **Create Index** page is displayed.
3. Select **Create a new CES 6 index**.
4. Migrate the index content. Refer to the [Index Configuration Migration](#) section.

Front-End/Back-End Setup

This type of setup has one back-end server hosting the index files and search service, as well as one or more front-end servers hosting the Search Interface. The migration of a front-end/back-end setup must be done in the following manner:

Note: The following procedure assumes no *ASP.NET* customizations have been done.

1. On the back-end server, execute the **Typical Setup** procedure above.
2. On each front-end server, uninstall CES 5 and install CES 6.0.

Mirror Setup

A mirror setup has one main index server, one or more mirror servers and optionally one or more front-end servers hosting Search Interfaces. The migration of a mirror setup must be done in the following manner:

Note: The following procedure assumes no *ASP.NET* customization has been done.

- On each mirror server:
 1. Uninstall CES 5. When asked, remove the index content. Mirror index content are re-synchronized from CES 6.0 main index server.
 2. Install CES 6.0. Select the **Advanced/Mirror** setup in the installation program.
- On the back-end server:
 1. Execute the **Typical Setup** procedure above.
 2. Synchronize mirrors. To do so, access the **Mirrors** page (Administration Tool > Index > Mirrors).
- On each front-end server:
 1. Uninstall CES 5.
 2. Install CES 6.0.

Scenario 2—CES 5 and CES 6.0 Side-by-Side

- The service for CES 6.0 needs to run on a different port than the one used by the service for CES 5.0.
- CES 6.0 needs to use a different port in its web site than the web site for CES 5.0.
- CES 5 and CES 6.0 cannot be running side-by-side in *SharePoint 2003* environments.
- With *SharePoint 2007*: CES 6.0 detects that CES 5 is integrated with *SharePoint*. CES 6.0 asks to remove the CES 5 integration by using the *SharePointInstaller* command line. Note that it is possible to remove it before running the CES 6.0 installation program.

Typical Setup

A typical setup is a single server installation without *ASP.NET* customizations. The steps here need to be followed as the base for every installation of CES 5.0 and CES 6.0 side-by-side. The migration of a typical setup must be done by executing the following procedure:

1. Prepare CES 5.0 before installing CES 6.0 since they share common entries in the .net web.config.
 - a. Open the *web.config* in *C:\Windows\Microsoft.NET\Framework\v2.0.*\CONFIG* in a text editor. If you are using a 64 bit version of CES 5.0 the path will be *C:\Windows\Microsoft.NET\Framework64\v2.0.*\CONFIG*.
 - b. Find the following line:


```
<locations coveoPath="C:\Program Files\Coveo Enterprise Search 5\Web\Coveo\"
searchUri="http://ServerName:8080" searchAdminUri="http://
ServerName:8080/SearchAdmin" helpUri="http:// ServerName:8080/Help/">
```
 - c. Highlight and copy it.
 - d. Access *C:\Program Files\Coveo Enterprise Search 5\Web*.
 - e. Open the *web.config* file located in this folder.
 - f. Copy the text copied in step c and past it between the `<coveoEnterpriseSearch>``</coveoEnterpriseSearch>` tags.
 - g. Save the changes.
2. Install CES 6.0. Select the **Typical Setup** type and follow the installation steps until the **Create Index** page is displayed.
 - a. Configure a new port for the service:
 - i. On the Configuration screen of the setup click on the Configuration button next to Port used by the service to change the port.
 - ii. In the Port box enter a port that is not used such as 52801.

- iii. Click OK.
- b. Configure the port for the web site.
 - i. On the Configuration screen of the setup click on the Configuration button next to Web site hosting the interfaces.
 - ii. Select Create a New Web site.
 - iii. Click Next.
 - iv. In the Web site port box enter a port that is not already used (ex: 8081).
 - v. Click OK.
3. Migrate the index configuration. For more information, refer to the [Index Configuration Migration](#) section.

Front-end/Back-end Setup

This type of setup has one back-end server hosting the index files and search service, as well as one or more front-end servers hosting the Search Interface. The migration of a front-end/back-end setup must be done in the following manner:



Note: The following procedure assumes no *ASP.NET* customizations have been done.

1. On the back-end server, execute the **Typical Setup** procedure above.
2. On each front-end server, launch CES 6.0 setup and in the **Choose Setup Type** page, select **Advanced**, then **Search Interfaces**.

Mirror Setup

A mirror setup has one main index server, one or more mirror servers and optionally one or more front-end servers hosting Search Interfaces. The migration of a mirror setup must be done in the following manner:

Note: The following procedure assumes no *ASP.NET* customization has been done.

- On the back-end server:
 - ▶ Execute the **Typical Setup** procedure above.
- On each mirror server:
 - ▶ Install CES 6.0. In the **Choose Setup Type** page, select **Advanced**, then **Mirrors** and complete the installation normally.
- On the back-end server, reconfigure mirrors:
 - ▶ Delete the mirrors in the Administration Tool (Index > Mirrors). Select all mirrors EXCEPT **Default** and click  **Delete**.
 - ▶ Reconfigure each mirror. For more information, refer to the **How to Add Mirrors** help topic in the Administration Tool help.
 1. In the **Name** field, enter a unique name. Coveo recommends using the mirror server name.
 2. In the **Location** field, enter the mirror server name.
 3. In the **Port** field, enter the port. Default value is: **52800**.
 4. In the **Index Folder** field, enter the path to store the mirror data. The path must be different from the CES 5 mirror one.
 5. Select **Create a converter on a mirror server**.
 6. Select **Create a slice on a mirror server**.
 7. Click  **Save**.
 - ▶ Synchronize each mirror: In the **Mirrors** page, select all new mirrors and select **Synchronize** from the **More Actions** drop-down list.
- On each front-end server:
 - ▶ Install CES 6.0. In the **Choose Setup Type** page, select **Advanced**, then **Search Interfaces**.

Scenario 3—Remove CES 5 when using SharePoint 2007

For *SharePoint* 2007, CES 6.0 requires its own version of the Web services it integrates to *SharePoint* to index its content. CES 5 and CES 6.0 cannot be integrated at the same time to *SharePoint* 2007; CES 6.0 can remove the CES 5 integration by using the *SharePointInstaller* command line. You can also simply uninstall CES 5 prior to installing CES 6.0.

Typical Setup (small SharePoint farm)

A typical setup is a single server installation without *ASP.NET* customizations. Migration of a typical setup must be done following these steps:

- **Uninstall CES 5.** When asked, keep the index content of CES 5.
- **Install CES 6.0.** Launch CES 6.0 setup. Follow the installation procedure. The **Install CES 6.0 program files** are installed in a different folder than CES 5. After the installation, the **Create Index** page is displayed. Select **Create a new CES 6.0 index**.
- **Migrate index content.** Refer to the [Index Configuration Migration](#) section.

Front-end/Back-end Setup (medium/large SharePoint farm)

This type of setup has one back-end server hosting the index files and search service, and one or more *SharePoint* front-end servers hosting the Search Interface. Migration of a front-end/back-end setup must be done following in the following manner.

Note: The following procedure assumes no *ASP.NET* customization has been done.

- On the front-end servers, uninstall CES 5.
- On the backend index server, uninstall CES 5. When asked, keep the index data.
- On the backend index server, install CES 6.0. Select the **Typical Setup** type.
- On the front-end servers, install CES 6.0. Select the **Advanced/Search Interface Setup** type.
- Migrate the index content. Refer to the [Index Configuration Migration](#) section.

Mirror Setup (medium/large SharePoint farm)

This type of setup has one back-end server hosting the index files one or more mirror servers and one or more *SharePoint* front-end server hosting the search interface. Migration of a front-end/back-end setup must be done in the following manner.

Note: The following procedure assumes no *ASP.NET* customization has been done.

- On the front-end servers, uninstall CES 5.
- On the mirror servers, uninstall CES 5.
- On the back-end index server, uninstall CES 5. When asked, keep the index data.
- On the back-end index server, install CES 6.0. Select the **Typical Setup** type.
- On the mirror servers, install CES 6.0. Select the **Advanced/Mirror Setup** type.
- Reconfigure mirrors on the back-end server.
 - ▶ Browse to the Administration Tool of the main index server.
 - ▶ Delete the mirrors from the Administration Tool.
 1. Browse to the Administration Tool on the main server.
 2. Access the **Mirrors** page (Index > Mirrors).
 3. Select all mirrors EXCEPT **Default** and click **Delete**.

- ▶ Reconfigure each mirrors
 1. In the **Mirrors** page (Index > Mirrors), click **Add**.
 2. **Name**: Enter a unique name for the mirror. It is recommended to use the mirror server name.
 3. **Location**: Enter the mirror server name.
 4. **Port**: Enter the port number. Default value: **52800**.
 5. **Index Folder**: Enter a path to hold the mirror data. The path must be different than the CES 5 mirror one.
 6. Select **Create a converter on a mirror server**.
 7. Select **Create a slice on a mirror server**.
 8. Click **Save**.
- ▶ Synchronize each mirror.
 1. In **Mirror** page, select all new mirrors.
 2. Select **Synchronize** from the **More Actions** drop-down list.
- On the front-end servers, install CES 6.0. Select the **Advanced/Search Interfaces Setup** type.
- Migrate the index content. Refer to the [Index Configuration Migration](#).

Scenario 4—CES 5 and CES 6.0 Side-by-Side with SharePoint 2007

CES 5 and CES 6.0 components (search box and result page) cannot coexist in *SharePoint 2007*. It is important to first install CES 6.0 without integration to *SharePoint 2007*, complete the content migration, uninstall the CES 5 integration, then install the CES 6.0 integration.

Typical Setup (small SharePoint farm)

A typical setup is a single server installation without *ASP.NET* customizations. The migration of a typical setup must be done by executing the following procedure:

- Install CES 6.0 without integration:
 1. Launch CES 6.0 and select the Custom setup type.
 - ▶ Refer to steps in [Scenario 2— Typical Setup](#) for the settings that are needed during the setup.
 2. Select the following components—All other components should be marked by a red cross (the features are not be available)—and complete the installation:
 - ▶ Coveo Enterprise Search Server
 - ▶ Coveo Enterprise Search Server / Administration Tool
 - ▶ Coveo Enterprise Search Console
 - ▶ Search Interface
 - ▶ Search Interface / Default Search Interface
- Migrate the index content. Refer to the [Index Configuration Migration](#) section.
- Uninstall the CES 5 integration:
 1. Access the **Control Panel** window (*Windows Start* menu > Control Panel).
 2. Double-click **Add/Remove Programs**.
 3. In **Coveo Enterprise Search 5**, click **Change**.
 4. In the **Choose Maintenance Type**, click **Change**.
 5. Expand **Search Interface** and disable **SharePoint Search Interface**.

- Install the CES 6.0 integration:
 1. Access the **Control Panel** window (*Windows Start* menu > Control Panel).
 2. Double-click **Add/Remove Programs**.
 3. In **Coveo Enterprise Search 6.0**, click **Change**.
 4. In the **Choose Maintenance Type**, click **Change**.
 5. Expand **Search Interface** and activate **SharePoint 2007 Search Interface**.

Front-end/Back-end Setup (medium/large SharePoint farm)

This type of setup has one back-end server hosting the index files and search service, as well as one or more front-end servers hosting the Search Interface. The migration of a front-end/back-end setup must be done in the following manner:

Note: The following procedure assumes no *ASP.NET* customization has been done.

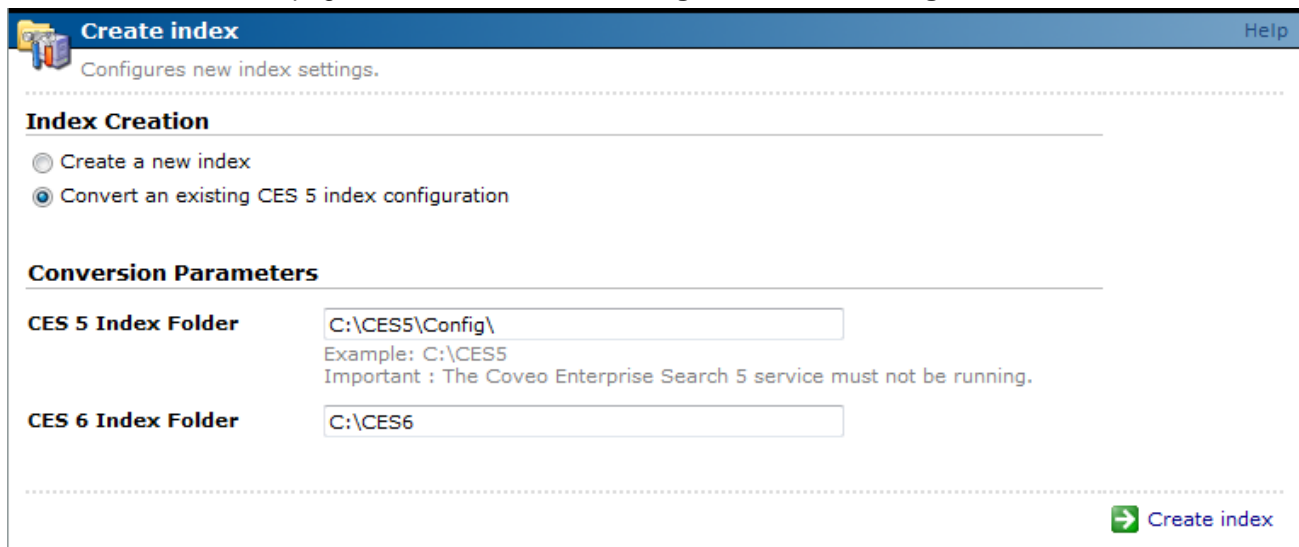
- On the back-end server, execute the **Typical Setup** procedure above.
- On each front-end server, uninstall the CES 5 integration. Follow the same **Uninstall the CES 5 integration** step as in the **Typical Setup** procedure.
- On each front-end server, install the CES 6.0 integration. Follow the same **Install the CES 6.0 integration** step as in the **Typical Setup** procedure.


Index Configuration Migration

CES 6.0 uses a new index format that improves format and scalability. Due to these changes, it is not possible to import an index from CES 5.0 to CES 6.0. It is necessary to rebuild it in CES 6.0; however, it is possible to import the index configuration from CES 5.0 to CES 6.0 in order to keep all index settings.

Import Configuration and Rebuild All

1. Install CES 6.0.
2. In the **Create index** page, select **Convert an existing CES 5 index configuration**.

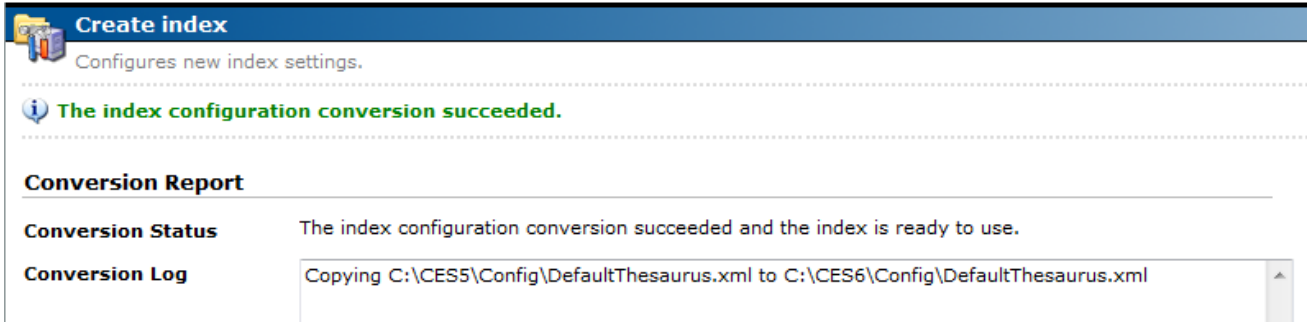


3. In **CES 5 Index Folder**, enter the path to the index folder where the configuration files are located. By default this folder is *C:\CES5\Config*.
4. In **CES 6 Index Folder**, enter a folder for the CES 6.0 index content.
5. Click  **Create index**. The following message is displayed:





Create index

Configures new index settings.

 **The index configuration conversion succeeded.**

Conversion Report

Conversion Status	The index configuration conversion succeeded and the index is ready to use.
Conversion Log	Copying C:\CES5\Config\DefaultThesaurus.xml to C:\CES6\Config\DefaultThesaurus.xml

6. Click  [Manage the Index](#) . The **Enter License Code** page is displayed.
7. Paste the content of the license file and click  [Apply Changes](#) .
8. Rebuild all sources.