

Coveo Enterprise Search for Intranet

Requirements to Crawl a SharePoint Server

WSS2/SPS 2003

▶ Web Service (Optional)

It is possible to extract securities without Coveo's Web service; however, it is essential for live indexing and site collection discovery.

WSS 3/MOSS 2007

▶ Web Service (Mandatory)

Coveo's Web service is essential in order to extract and index securities and for site collection discovery.

To crawl a WSS 3/MOSS 2007 server, the *Coveo Enterprise Search* (CES) user must have a *Full Read* permission for each *SharePoint* Web application to crawl. This permission is required because the CES *SharePoint* connector uses the *SharePoint* Web services to access the *SharePoint* data, and these Web services require the calling user to have the Web application *Full Read* permission to successfully process the request. Note that the *SharePoint* built-in searches also have this requirement. For more information, refer to the **Windows SharePoint Services Search accounts** sections of the Web pages:

- <http://technet.microsoft.com/en-us/library/cc288210.aspx> (WSS 3)
- <http://technet.microsoft.com/en-us/library/cc179348.aspx> (MOSS 2007)

Perform the following procedure in order to manually add this permission:

1. Access **SharePoint 3.0 Central Administration**.
2. Click **Application Management**.
3. Click **Policy for Web application**.
4. For every Web application to crawl:
 - Click Add Users.
 - Select **(All Zones)** and click **Next >**.
 - Add the CES crawling user, select the **Full Read** permission and click **Finish**.

For MOSS 2007, to crawl *SharePoint* user profiles and personal sites data, the CES crawling user must have the **Read** permission for the CES source starting address' site collection and have the **Manage User Profiles Shared Service** right. Perform the following procedure in order to manually add the **Read** permission:

1. Access the *SharePoint* site collection of the CES source starting address.
2. Click **Site Actions** and select **Site Settings**.
3. Click **Advanced Permissions** in the **Users and Permissions** column.
4. Click **New**.
5. Add the CES crawling user, select **Give users permission directly**, select the **Read** permission and click **OK**.

Perform the following procedure in order to manually add the **Manage User Profiles Shared Service** right:

1. Access **SharePoint 3.0 Central Administration**.
2. Click **Shared Services Administration**.
3. Click the shared service link hosting the user profile and personal site data.
4. Click **Personalization services permissions**.
5. Click Add Users/Groups.
6. Add the CES crawling user, select the **Manage user profiles** permission and click **Save**.

Important: If CES is integrated with *SharePoint* and the CES crawling user is a member of the *SharePoint* farm administrator's group and has the **Read** permission for the starting address' site collection, the CES *SharePoint* connector performs these actions when a source refresh/rebuild is executed:

- The *Full Read* permission is automatically granted for the CES crawling user for all farm Web applications;
- The **Manage User Profiles Shared Service** right is automatically granted for the CES crawling user (MOSS 2007 only).