**COVEO**™

**Coveo Platform 7.0**

Desktop Connector Guide

## Notice

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# 1. Desktop Connector

The Desktop connector allows to index files located on end-user (desktop and laptop) computers connected to your network. The Desktop connector operates together with the Desktop Integration Package (DIP) that, among other features, allows end-users to specify the local folders and mail archive files to be indexed by the Desktop connector.

Once files from the desktop or laptop computer of an end-user are integrated into the Coveo unified index, this end-user (and only this end-user) can search and review the content of his files from any Coveo access point (including form a mobile device) using the Quick View. Because an HTML version of the files is in the unified index, this is true even when the source computer is offline or powered off.

As a Coveo administrator, when you deploy the DIP to end-user computers, you can configure features to be configurable by the end-user, to have fixed values, or to be disabled. Once the content of end-user computers is indexed, you can also manage remote clients from the Administration Tool.

## 1.1 Features

The following details the features available in the Desktop connector:

**Security**

When crawling files from an end-user computer, the connector indexes file permissions associated to the computer user, ignoring local file and folder sharing permissions that the end-user may have set. This ensures only the computer user can see his files in the search results.

**Incremental Refresh**

The Desktop connector uses file live monitoring to dynamically look for modifications made to the files on the end-user computer, thus keeping the index synchronized with the content of the computer, without requiring the source to be refreshed.

**Mail archives**

The Desktop connector can optionally open and index the content of mail archive files from Microsoft Exchange Personal Folders (`.pst`) and Microsoft Exchange Offline Folders (`.ost`).

**Note:** Microsoft Exchange Personal Folders (`.pst`) files and Microsoft Exchange Offline Folders (`.ost`) files are referred to as *mail archives* in the Desktop connector documentation.

**DIP client-side configuration**

The Desktop connector operates together with the Desktop Integration Package (DIP) that allows end-users to specify the local folders and mail archive files to be indexed by the Desktop connector.

## 1.2 Feature history

| CES version | Date | Features |
|---|---|---|
| 7.0.4876+ | October 2012 | The **Authentication** source parameter is now taken into account (see "Configuring and Indexing a Desktop Connector Source" on page 5) and the `LdapSearchRoot` hidden parameter was added (see "Modifying Hidden Desktop Source Parameters" on page 10) for rare cases where end-users do not have read access to Active Directory. |

## What's Next?

Review the overview of the deployment process for this connector (see "Desktop Connector Deployment Overview" on page 3).

# 2. Desktop Connector Deployment Overview

The following procedure outlines the steps needed to bring content from end-user computers into the Coveo unified index using the Desktop connector. The steps indicate the order in which you must perform the tasks.

1. Validate that your environment meets the requirements (see "Desktop Connector Requirements" on page 4).

2. In the Coveo Administration Tool, create and configure a Desktop source.

   The Desktop connector needs to know details about the end-user computers to be able to index their content (see "Configuring and Indexing a Desktop Connector Source" on page 5).

3. Deploy the Desktop Integration Package (DIP) on end-user computers.

   You need to manage the installation of the DIP on end-user computers using one of the suggested methods (see "Desktop Integration Package Deployment Overview" on page 14).

4. Notify and train end-users to take advantage of the Desktop Integration Package to index local files.

5. Manage remote clients.

   Once the content of end-user computers is indexed, you can centrally manage remote clients from the Administration Tool. You can rebuild, refresh, delete, or disable indexed content from end-user computers (see "Managing Desktop Connector Remote Clients" on page 36).

# 3. Desktop Connector Requirements

Your environment needs to meet the following requirements to be able to use the Coveo connector for end-user desktop and laptop computers:

- Coveo license for the Desktop Connector

  Your Coveo license must include support for the Desktop Connector to be able to use this connector.

- Microsoft Windows OS on client-side computers

  The end-user computers must run Microsoft Windows 8 or 7.

  **Note:** Coveo .NET Front-End 12.0.146+ (April 2013) The Desktop Integration Package supports Windows 8.

## What's Next?

Create and configure a Desktop connector source (see "Configuring and Indexing a Desktop Connector Source" on page 5).

# 4. Configuring and Indexing a Desktop Connector Source

A Desktop connector source defines a set of configuration parameters determining the end-user computers on the network of your organization from which content can be indexed.

The Desktop connector operates with the Desktop Integration Package (DIP) deployed on end-user computers. The source identifies end-users for which files on desktop and laptop computers that they use should be indexed. The source also identifies the port (`1980` by default) on which the connector listens. While the end-user computers are connected to your organization network, the DIP client regularly (every `10` minutes by default) contacts the Coveo server on the Desktop connector port to push new, modified, moved, or deleted local files from the folders specified to be indexed on the computer, thus keeping the index up-to-date.

**Note:** End-users can configure the local folders to index and review the indexing history from their computer.

It is recommended to create one Desktop source for all your desktop or laptop end-users. If you need to create more than one Desktop source, use a different port for each source and adapt your DIP deployment to use the appropriate port accordingly.

To configure and index a Desktop connector source

1. On the Coveo server, access the Administration Tool.

2. Select **Index** > **Sources and Collections**.

3. In the **Collections** section:

   a. Select an existing collection in which you want to add the new source.

      OR

   b. Click **Add** to create a new collection.

4. In the **Sources** section, click **Add**.

   The **Add Source** page that appears is organized in three sections.

5. In the **General Settings** section of the **Add Source** page:

COVEO™
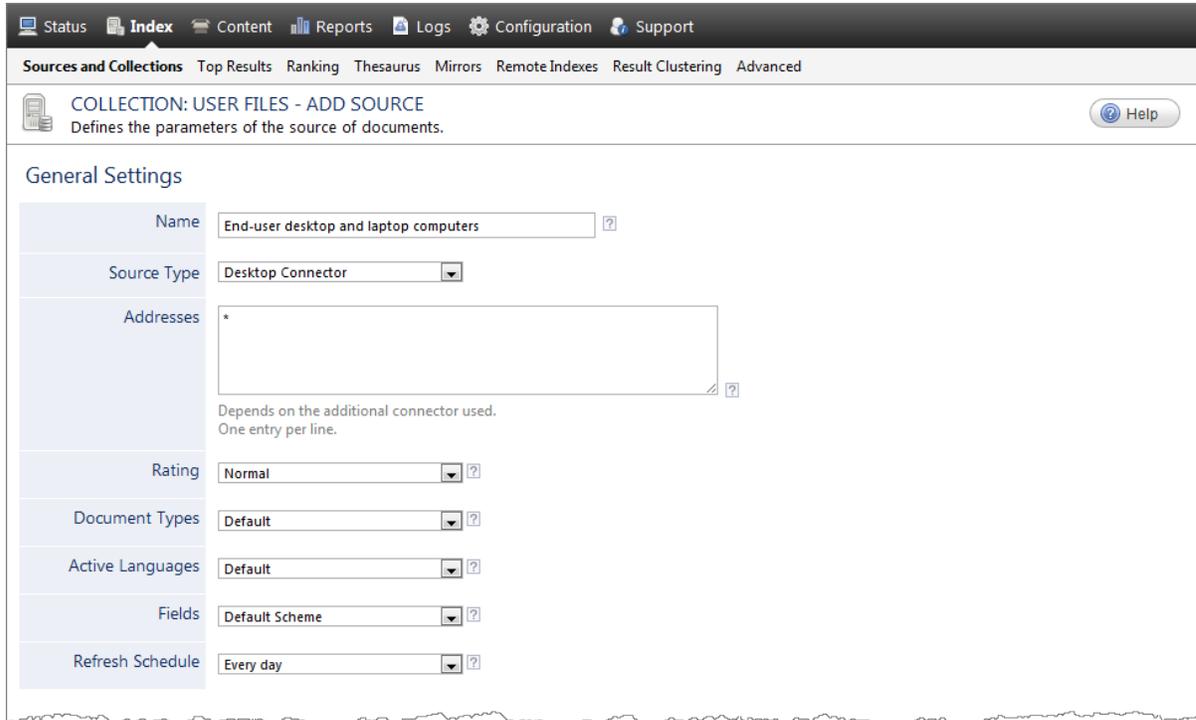


a. Enter the appropriate value for the following required parameters:

**Name**

Enter a descriptive name of your choice for the connector source.

**Example:** `End-user desktop and laptop computers`

**Source Type**

Select the connector used by this source. In this case, select **Desktop Connector**.

**Note:** If you do not see **Desktop Connector**, your environment does not meet the requirements (see "Desktop Connector Requirements" on page 4).

**Addresses**

The list of users whose computer content is to be indexed. Enter `*` to index the content of all end-user computers. Alternatively, enter usernames on separate lines in the form `domain\username` or `username@domain`. You can not specify groups.

**Note:** When a user logs to more than one computer on which the DIP is installed and local folders are configured to be indexed, the content from each computer is indexed for this user.

**Refresh Schedule**

Time interval at which the source is automatically refreshed to keep the index content up-to-date. This connector supports incremental refreshes, so the recommended option is either **Every Sunday** or **Every day**.

> **Note:** You can create a new (or modify an existing) source refresh schedule.

> **Example:** You can schedule the refresh at lunch time for which chances are higher that many desktop or laptops are powered on and connected to the organization network and, that the indexing will less likely disturb users.

    b.   Review the value for the following parameters that often do not need to be modified:

**Rating**

Change this value only when you want to globally change the rating associated with all items in this source relative to the rating of elements in other sources.

**Document Types**

If you created a custom document type set for this source, select it. Otherwise, select **Default**.

**Active Languages**

If you defined custom active language sets, ensure to select the most appropriate for this source.

**Fields**

If you defined custom field sets, ensure to select the most appropriate for this source.

6.   In the **Specific Connector Parameters & Options** section of the **Add Source** page, review the default value for the following parameters:
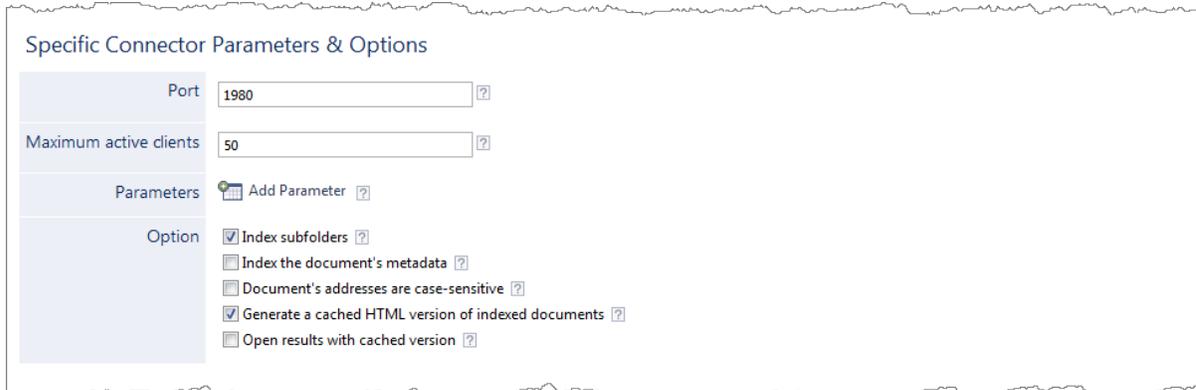


**Port**

Computer port used by the Desktop Integration Package to communicate with the Desktop connector. The default is `1980` and should not be changed. If you must use another port, you need to deploy the DIP using the GPO method and specify the same port number (see "Configuring the Desktop Integration Package GPO" on page 17).

**Maximum active clients**

The maximum number of DIP clients from end-user computers that can simultaneously be connected to the Desktop connector. The default value is 50. When the limit is reached, new connection requests are

refused. DIP clients automatically retry 10 minutes later when the Desktop connector refuses a connection.

**Parameters**

Click **Add Parameter** when you want to show advanced source parameters. There are no advanced parameters for this type of connector. The Coveo Support could instruct you to click **Add Parameters** to specify other source parameter names and values that could help to troubleshoot issues.

**Index Subfolders**

This parameter does not apply and is not taken into account by the Desktop source.

**Index the document's metadata**

When selected, CES indexes all the document metadata, even metadata that are not associated with a field. The orphan metadata are added to the body of the document so that they can be searched using free text queries.

When cleared (default), only the values of system and custom fields that have the **Free Text Queries** attribute selected will be searchable without using a field query.

> **Example:** A document has two metadata:
>
> - `LastEditedBy` containing the value `Hector Smith`
>
> - `Department` containing the value `RH`
>
> In CES, the custom field `CorpDepartment` is bound to the metadata `Department` and its **Free Text Queries** attribute is selected.
>
> When the **Index the document's metadata** option is cleared, searching for `RH` returns the document because a field is indexing this value. Searching for `hector` does not return the document because no field is indexing this value.
>
> When the **Index the document's metadata** option is selected, searching for `hector` also returns the document because CES indexed orphan metadata.

**Document's addresses are case-sensitive**

Leave the check box cleared. This parameter needs to be checked only in rare cases for systems in which distinct documents may have the same name but different casing.

**Generate a cached HTML version of indexed documents**

Select this check box so that at indexing time, CES creates HTML versions of indexed documents. In the search interfaces, end-users can then more rapidly review the content by clicking the **Quick View** link rather than opening the original document with the original application.

For a Desktop source, when the end-user computer is offline or powered off, the Quick View is the only way to review the content of the documents. Consider clearing this check box only if you do not want to use Quick View links or to save resources when building the source.

**Open results with cached version**

Leave this check box cleared (recommended) so that in the search interfaces, the main search result link

opens the original document with the original application. Consider selecting this check box only when you do not want users to be able to open the original document but only see the HTML version of the document as a Quick View. In this case, you must also select **Generate a cached HTML version of indexed documents**.

7. In the **Security** section of the **Add Source** page:



a. In the **Security Provider** drop-down list, select **Active Directory** or a custom Active Directory security provider that you created for a specific domain.

b. In the **Authentication** drop-down list:

**Note:** CES 7.0.4863– (September 2012) The **Authentication** parameter is not taken into account by the Desktop source. The user identity comes from the DIP clients.

- When end-users accounts have read access to Active Directory, select **(none)**.

- When only specific Windows accounts have read access to Active Directory, select a user identity with credentials that can connect to LDAP to retrieve information on remote clients.

**Note:** When your LDAP server is not the default server, you can use the `LdapSearchRoot` hidden parameter to target a specific LDAP server, port, or path when searching for remote clients accounts (see "Modifying Hidden Desktop Source Parameters" on page 10).

**Important:** When end-users do not have read access to Active Directory and you do not specify a user identity that has read access, Outlook items (.Pst or .Ost) will be indexed but no mailbox will be assigned to their `@sysmailbox` field. The consequence is that end-users will not see their emails in the search results. If this situation occurs, set the **Authentication** and the `LdapSearchRoot` parameters appropriately so the LDAP search performed by the Desktop Connector can find the LDAP accounts for all remote clients.

c. Click **Save and Start** to save the source configuration and start the indexing of the new source.

The indexing starts only after the DIP is installed on one or more end-user computers connected to the organization network, and folders to index are configured.

## What's Next?

Deploy the DIP on end-user computers (see "Desktop Integration Package Deployment Overview" on page 14).

## 4.1 Modifying Hidden Desktop Source Parameters

The **Add Source** and **Source: ... General** pages of the Administration Tool present the parameters with which you can configure the connector for most Desktop setups. More advanced and more rarely used parameters are hidden. You can choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value. Consider changing values of hidden parameters when you encounter issues.

There is currently only one advanced hidden parameter available with Desktop sources.

**LdapSearchRoot (String)** `CES 7.0.4876+ (October 2012)`

> Optional LDAP search root parameter used to retrieve information on remote clients (display name, mailbox, etc.). When your LDAP server is not the default server, use this parameter to target a specific LDAP server, port, or path when searching for remote clients accounts.
>
> **Example:** `LDAP://OU=Users,DC=corp,DC=acme,DC=com`

Use the following procedure only when you want to modify one or more of the above hidden source parameters.

### To modify hidden Desktop source parameters

1.  Refer to "Adding an Explicit Connector Parameter" on page 10 to add one or more Desktop hidden source parameters.

2.  For a new Desktop source, access the **Add Source** page of the Administration Tool to modify the value of the newly added advanced parameter:

    a.  Select **Index** > **Sources and Collections**.

    b.  Under **Collections**, select the collection in which you want to add the source.

    c.  Under **Sources**, click **Add**.

    d.  In the **Add Source** page, edit the newly added advanced parameter value.

3.  For an existing Desktop source, access the **Source: ... General** page of the Administration Tool to modify the value of the newly added advanced parameter:

    a.  Select **Index** > **Sources and Collections**.

    b.  Under **Collections**, select the collection containing the source you want to modify.

    c.  Under **Sources**, click the existing Desktop source in which you want to modify the newly added advanced parameter.

    d.  In the **Source: ... General** page, edit the newly added advanced parameter value.

4.  Rebuild your Desktop source to apply the changes to the parameters.

## 4.2 Adding an Explicit Connector Parameter

Connector parameters applying to all sources indexed using this connector are called explicit parameters.

When you create or configure a source, the Coveo Enterprise Search (CES) 7.0 Administration Tool presents parameters with which you can configure the connector for most setups. For many connectors, more advanced and more rarely used parameters also exist but are hidden by default. CES then uses the default value associated with each of these hidden parameters.

You can however choose to make one or more of these parameters appear in the **Add Source** and **Source: ... General** pages of the Administration Tool so that you can change their default value.

To add an explicit connector parameter

1. On the Coveo server, access the Administration Tool.

2. Select **Configuration** > **Connectors**.

3. In the list on the **Connectors** page, select the connector for which you want to show advanced hidden parameters.

4. In the **Parameters** section of the selected connector page, click **Add Parameter** for each hidden parameter that you want to modify.

   **Note:** The **Add Parameter** button is present only when hidden parameters are available for the selected connector.

5. In the **Modify the parameters of the connector** page:



   a. In the **Type** list, select the parameter type as specified in the parameter description.

   b. In the **Name** box, type the parameter name exactly as it appears in the parameter description. Parameter

names are case sensitive.

c. In the **Default Value** box, enter the default value specified in the parameter description.

> **Important:** Do not set the value that you want to use for a specific source. The value that you enter here will be used for all sources defined using this connector so it must be set to the recommended default value. You will be able to change the value for each source later, in the **Add Source** and **Source: ... General** pages of the Administration Tool.

d. In the **Label** box, enter the label that you want to see for this parameter.

> **Example:** To easily link the label to the hidden parameter, you can simply use the parameter name, and if applicable, insert spaces between concatenated words. For the **BatchSize** hidden parameter, enter `Batch Size` for the label.

> **Note:** To create multilingual labels and quick help messages, use the following syntax: `<@ln>text</@>`, where *ln* is replaced by the language initials—the languages of the Administration Tool are English (en) and French (fr).

> **Example:** `<@fr>Chemin d'accès du fichier de configuration</@><@en>Configuration File Path</@>` is a label which is displayed differently in the French and English versions of the Administration Tool.

> **Tip:** The language of the Administration Tool can be modified by pressing the following key combination: `Ctrl+Alt+Page Up`.

e. Optionally, in **Quick Help**, enter the help text that you want to see for this parameter when clicking the question mark button ⍰ that will appear beside the parameter value.

> **Tip:** Copy and paste key elements of the parameter description.

f. When **Predefined values** is selected in the **Type** parameter, in the **Value** box that appears, enter the parameter values that you want to see available in the drop-down parameter that will appear in the Administration Tool interface. Enter one value per line. The entered values must exactly match the values listed in the hidden parameter description.

g. Select the **Optional parameter** check box when you want to identify this parameter as an optional parameter. When cleared, CES does not allow you to save changes when the parameter is empty. This parameter does not appear for **Boolean** and **Predefined values** parameter types.

h. Select the **Sensitive information** check box for password or other sensitive parameter so that, in the Administration Tool pages where the parameter appears, the typed characters appear as dots to mask them. This parameter appears only for the **String** type.

> **Example:** When you select the **Sensitive information** check box for a parameter, the characters typed appear as follows in the text box:
>
> ` ●●●● `

i. Select the **Validate as an email address** check box when you want CES to validate that the text string that

a user enters in this parameter respects the format of a valid email address. This parameter appears only for the **String** type.

j.  In the **Maximum length** box, enter the maximum number of characters for the string. This parameter appears only for the **String** type. When you enter `0,` the length of the string is not limited.

k.  Click **Save**.

6.  Back in the **Connector** page, click **Apply Changes**.

The hidden parameter now appears in the **Add Source** and **Source: ... General** pages of the Administration Tool for the selected source. You can change the parameter value from these pages. Refer to the documentation for each connector for details.

**Note:** When you want to modify a hidden source parameter, you must first delete it, and then redefine it with the modified values.

# 5. Desktop Integration Package Deployment Overview

The Desktop Integration Package (DIP) installs the Desktop Searchbar and the Outlook Sidebar on end-user computers. The DIP can also allow end-users to configure which folders and files should be crawled from their computer to be added to the unified index.

> **Notes:**
>
> - The DIP works together with the Desktop connector to allow indexing of files stored on end-user computers. If it is not already done, before deploying the DIP, you must create and configure a Desktop connector source.
>
> - The DIP can be deployed on Windows 8 or 7 end-user computers.
>   CES 7.0.4897+ (December 2012) Support for Windows 8.
>
> - With Outlook 2007 and up, for Windows systems, the `outlook://` protocol used by the email result links in Coveo search interfaces (other than the Coveo Outlook Sidebar) is disabled by default. When you want users to be able to open email search results from these search interfaces directly in Outlook, if not already done, enable the protocol on all workstations for example using GPO (see Shortcuts and the Missing Outlook:// Protocol).
>
> - The Desktop Integration Package currently does not support screen resolutions above 1920 x 1080 in which case the Outlook Sidebar appears too small.

The Desktop Searchbar and the Outlook Sidebar bring Coveo search a keystroke or a click away from where end-users work. These useful Coveo access points often help end-users to more quickly adopt the Coveo solution. The DIP is available to all Coveo implementations. For these reasons, it is recommended to deploy the DIP within your organization.

As a Coveo administrator, you need to download, distribute, install, and maintain updates of the Desktop Integration Package on the end-user desktop and laptop computers within your organization.

The following sections present the available DIP deployment methods.

**Group-Policy Object method**

In a Microsoft Windows Active Directory environment, this method consists in creating and configuring a Group Policy Object (GPO) to automatically manage the DIP distribution, installation, and updates on selected end-user computers (see "Creating a DIP Deployment Group Policy Object" on page 15).

This is the recommended method as it offers many advantages.

Pros:

- Controls exactly on which computer the DIP is installed.

- Controls which DIP features are enabled.

- Can pre-configure standard local folders to index.

- Automatically deploys the DIP initial version and updates.

- Contributes to maximize the usage and adoption of the Coveo solution.

Cons:

- Needs Active Directory environment and permissions.

- More complex configuration.

**Login script method**

This method consists in creating and using a login script to install the DIP when it is not already installed on the computer (see "Deploying the Desktop Integration Package Using a Login Script" on page 33).

Pros:

- Simple to configure

- Automatically deploys the DIP initial version.

Cons:

- Still need GPO if you want to control which DIP features are enabled.

**Manual distribution method**

This method consists in making the DIP installer available to your end-users and rely on them to install and configure the DIP (see "Manually Deploying the Desktop Integration Package" on page 33).

Pros:

- No configuration, only need to inform end-users of the availability of the DIP installer.

Cons:

- Relies on end-user to install the DIP.

- Cannot control which DIP features are enabled.

- Each user must configure folders to index from scratch.

- Need to inform and rely on end-users to install updated version of the DIP.

What's Next?

Make DIP updates available for an easy deployment (see "Automatically Updating the DIP on All Computers" on page 34).

## 5.1 Creating a DIP Deployment Group Policy Object

In a Microsoft Windows Active Directory environment, the Group Policy Object (GPO) method allows you to centrally control how the Desktop Integration Package (DIP) is distributed, installed, updated, and initially configured on end-user computers. You can also decide which DIP features are available and configurable by end-users.

To create a DIP deployment GPO

1. Download the latest DIP version.

   > **Note:** Ensure that you are currently using recent versions of CES and Coveo .NET Front-End (not necessary when deploying a Coveo Search API hosted JavaScript Search page) and consider upgrading to their latest version to prevent compatibility issues (see Coveo Platform Software Installation). Contact Coveo Support for more information.

2. Using an administrator account that meets the following requirements, connect to the domain server of your organization:

   - Permissions to create and edit group policies on the domain (at least a member of the Group Policy Creator and Owners).

   - Access to the Group Policy Management Console (GPMC)

3. Using the link provided by the Coveo support, download and save the DIP installer file (`.exe` or `.msi`) to a folder where all end-users for which you want to deploy the DIP have read and execute permissions.

   > **Example:** Save the file in the `[Your _DFS]\SysVol\[Your_Domain]\Policies` folder.

4. You also need a copy of the DIP administrative template file on your server:

   a. Copy the content or download the administrative template file (see "Desktop Integration Package GPO Administrative Template File" on page 29).

   b. Save the file with the file name `Coveo Desktop Integration Package Configuration.adm` in a folder of your choice on the domain server.

5. Start the Group Policy Management Console (**Start** menu > **Administrative Tools** > **Group Policy Management**).

6. In the **Group Policy Management** console:

   a. Open the organizational unit (OU) for which you want to add the DIP deployment GPO.

   b. You can add the DIP deployment to an existing GPO or create a new one, in which case:

      i. Right-click the organizational unit and select **Create and Link a GPO Here**.

      ii. In the **New GPO** dialog box, enter a name of your choice for the GPO, and then click **OK**.

         > **Example:** `Coveo Desktop Integration Package`

   c. Right-click on the newly created or existing GPO to which you want to add the DIP Deployment, and then select **Edit**.

7. In **Group Policy Object Editor** that appears:

   a. In the tree, expand **User Configuration** > **Software Settings**.

   b. Right-click **Software Installation**, and then select **New** > **Package**.
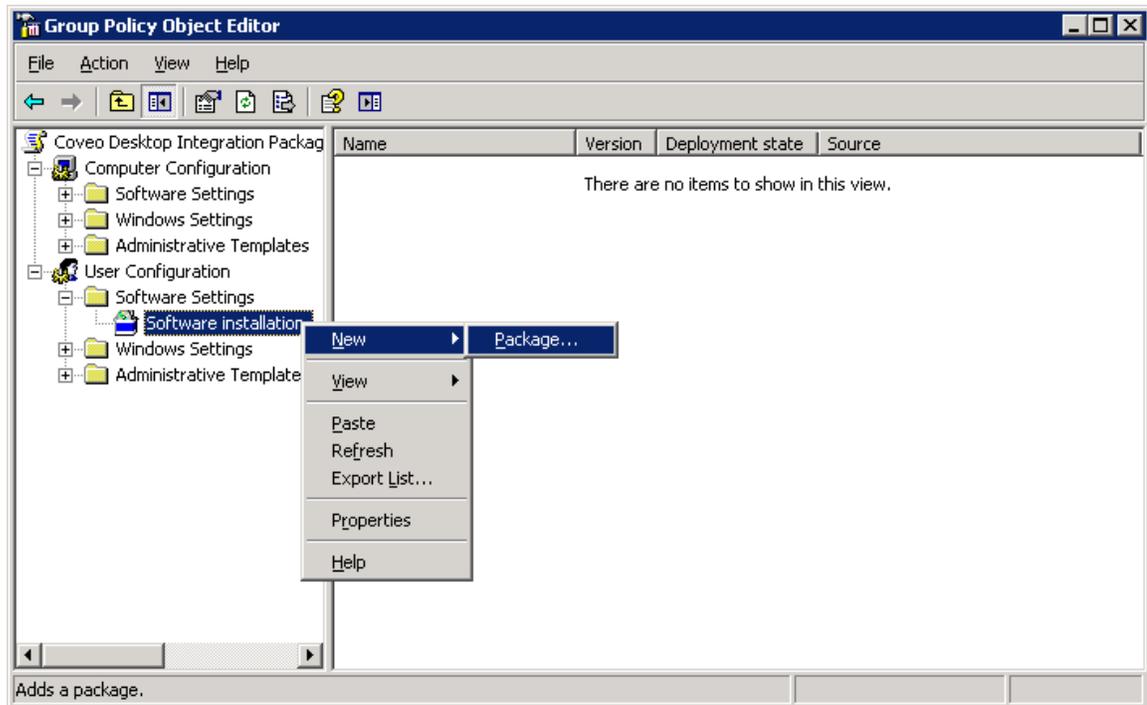
c. In the **Open** dialog box, select the DIP installer file (`Coveo Desktop Integration Package 12 EN.msi`) from the folder where you saved it, and then click **Open**.

d. In the **Deploy Software** dialog box that appears, select **Assigned** to automatically install the DIP on end-user computers at logon, and then click **OK**.

e. In the tree under **User Configuration**, right-click **Administrative Templates**, and then select **Add/Remove Templates**.

f. In the **Add/Remove Templates** dialog box, click **Add**.

g. In the **Policy Templates** dialog box, select the DIP administrative template file that you saved on the domain server, and then click **Open**.

h. Back in the **Add/Remove Templates** dialog box, click **Close**.

## What's Next?

Configure the DIP parameters in the Group Policy Object (see ).

## 5.1.1 Configuring the Desktop Integration Package GPO

In the Group Policy Object (GPO), you can configure three Desktop Integration Package (DIP) categories of parameters:

- General

- File Indexing

- Outlook Indexing

These categories correspond to the three tabs available to the end-user in the **Coveo Desktop Integration Package Options** dialog box.

In the GPO, you can specify the state of each parameter as:

**Not Configured**

The setting is not forced by the GPO and the end-user can change the corresponding parameters. The registry is not modified.

**Disabled**

Deactivates the setting. The end-user cannot change the corresponding parameters. The registry reflects that the policy setting is not selected.

**Enabled**

Activates the setting and allows to set a default value by GPO for the corresponding parameters. Depending on the parameter, the end-user can or cannot change the values. The registry reflects that the policy setting is selected.

## To configure the Desktop Integration Package GPO

**Note:** This procedure is documented for a Windows Server 2008.

1. Connect to the domain server of your organization using an administrative account that meets the following requirements:

   - Permissions to create and edit group policies on the domain (at least a member of the Group Policy Creator and Owners).

   - Access to the Group Policy Management Console (GPMC).

2. Start the Group Policy Management Console (GPMC) (**Start** menu > **Administrative Tools** > **Group Policy Management**).

3. In the **Group Policy Management** Console:

   a. In the tree, expand **Group Policy Objects** in the forest and domain containing the GPO for the Desktop Integration Package.

   b. Right-click the GPO for the Desktop Integration Package, and then click **Edit**.

4. In the **Group Policy Object Editor**:

   a. Expand **User Configuration** > **Administrative Templates** > **Coveo Desktop Integration Package Configuration** > **General**.

   b. In the **General** panel, in the **Setting** column, double-click **Set URI for the search page used**.
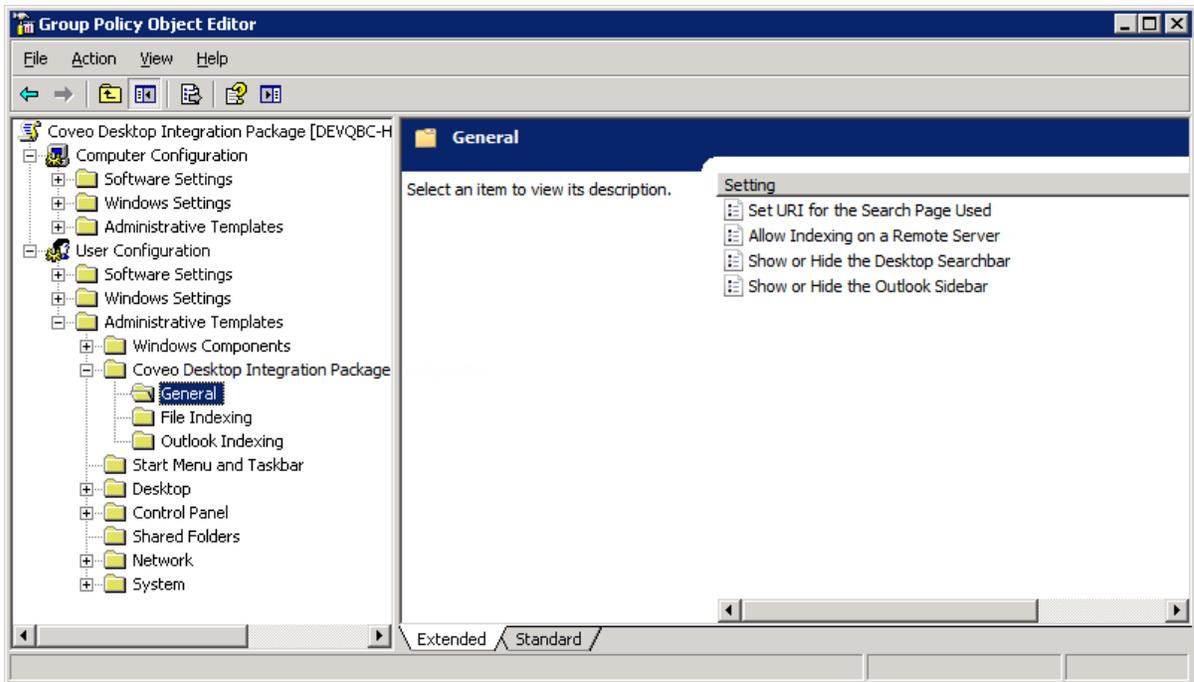
5.  In the **Set URI for The Search Page Used** dialog box:
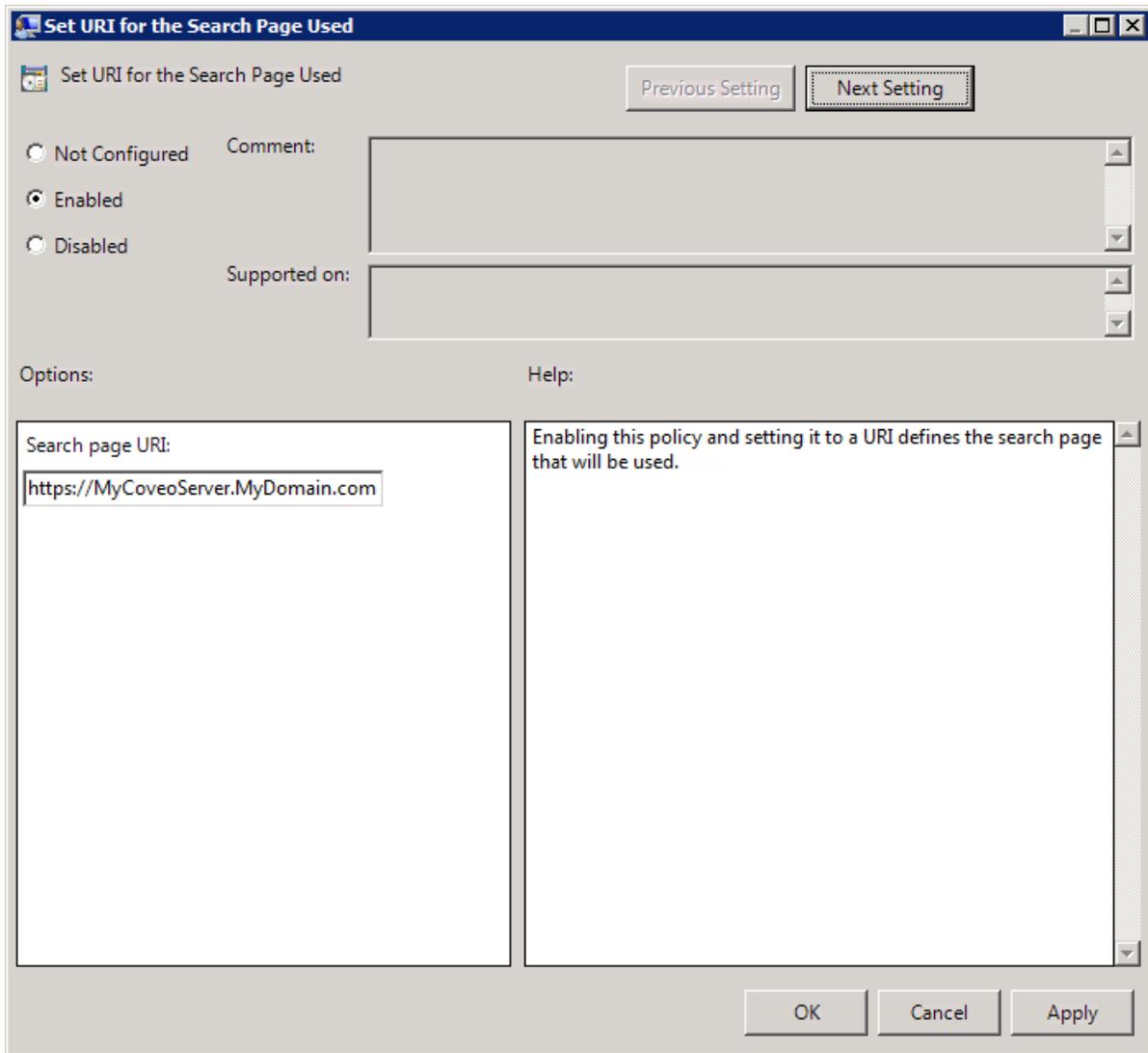
a. Select **Enabled** to set the Coveo Front-End server used by the Desktop Searchbar and the Outlook Sidebar. End-users will not be able to change the server.

   a. In the **Search page URI** parameter, enter the URI of the Coveo Front-End server.

      **Example:** `https://MyCoveoServer.MyDomain.com`

      **Note:** The GPO does not verify the format the entered URI. Ensure that the URI entered is valid.

b. Click **Next Setting**.

**Important:** The URI of the Coveo Front-End server should be added to the trusted sites of the end-user Internet Explorer to prevent users from receiving frequent requests to authenticate themselves with their user name and password.

6. In the **Allow Indexing on a Remote Server** dialog box:
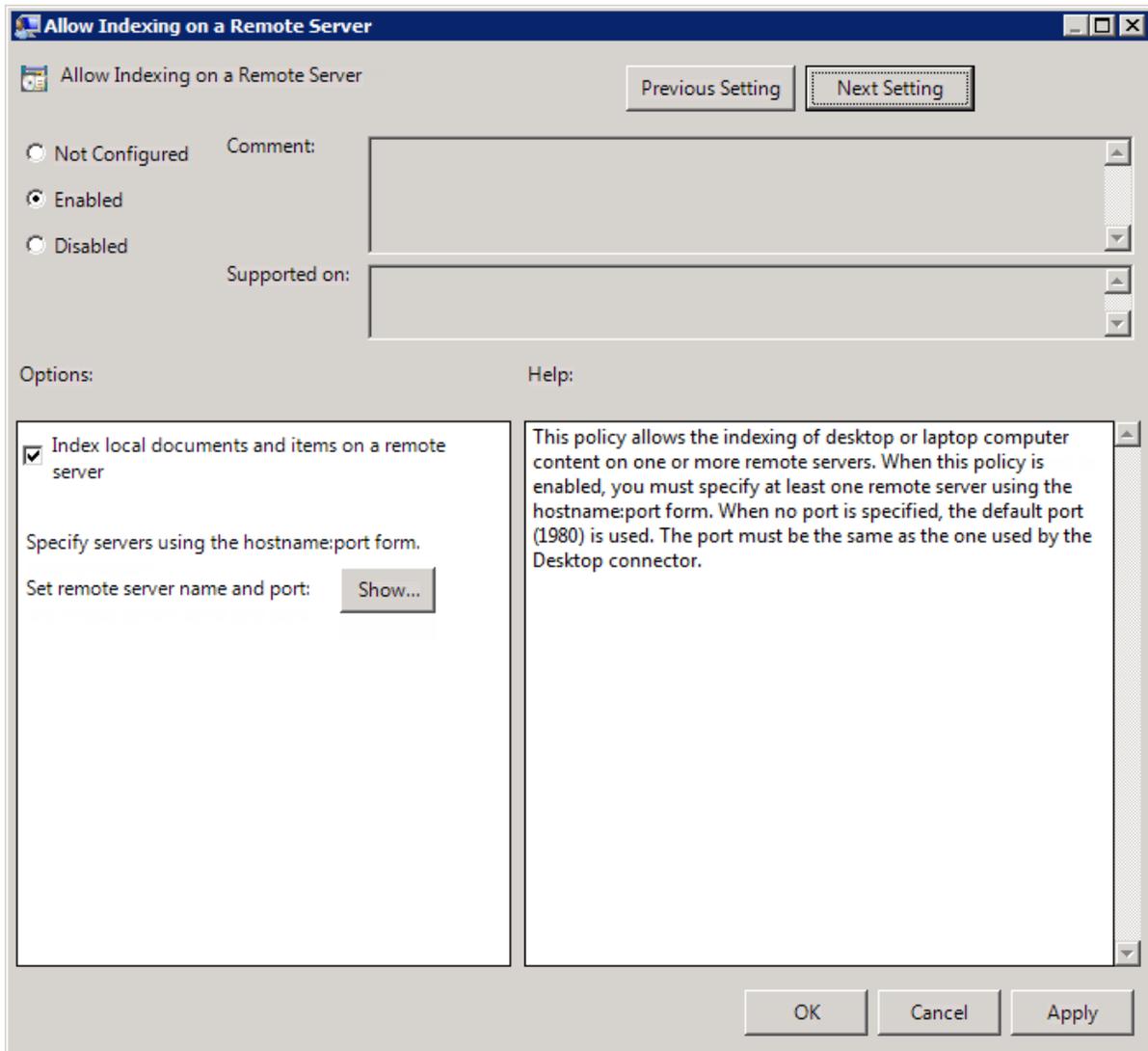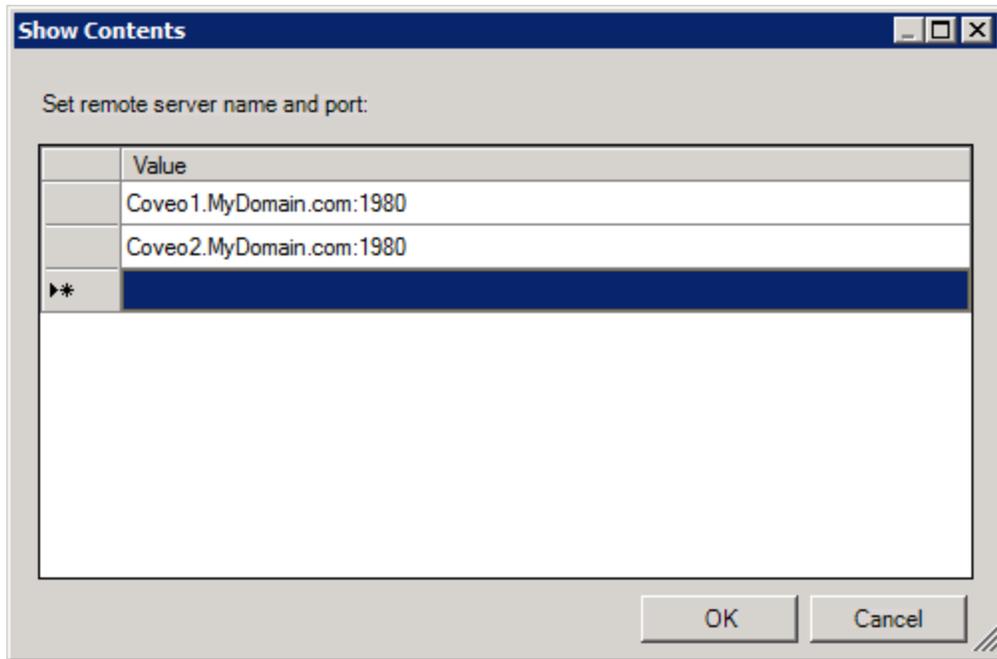
a. Select **Enabled** to force settings that end-users will not be able to change.

b. Select the **Index local documents and items on a remote server** check box.

   This enables indexing of the content from the desktop or laptop computer on which the DIP will be deployed.

c. Click **Show**, and in the **Show Contents** dialog box:

i.  In the **Value** list, enter the address of the Coveo Back-End server in the `[hostname1]:[port]` form.

    You can add more than one server. This is useful when you run separate instances of CES in two or more environments such as Development, Quality Assurance, and Production. You can specify the CES remote server name and port for each environment in which you want desktop/laptop indexed content to be sent.

    **Note:** When no port is specified, the default value (`1980`) is used but it is strongly recommended to specify the port. The port must be the same value specified for the Desktop connector source.

ii.  Click **OK**.

d.  Click **Next Setting**.

7.  In the **Show or Hide the Desktop Searchbar** dialog box:
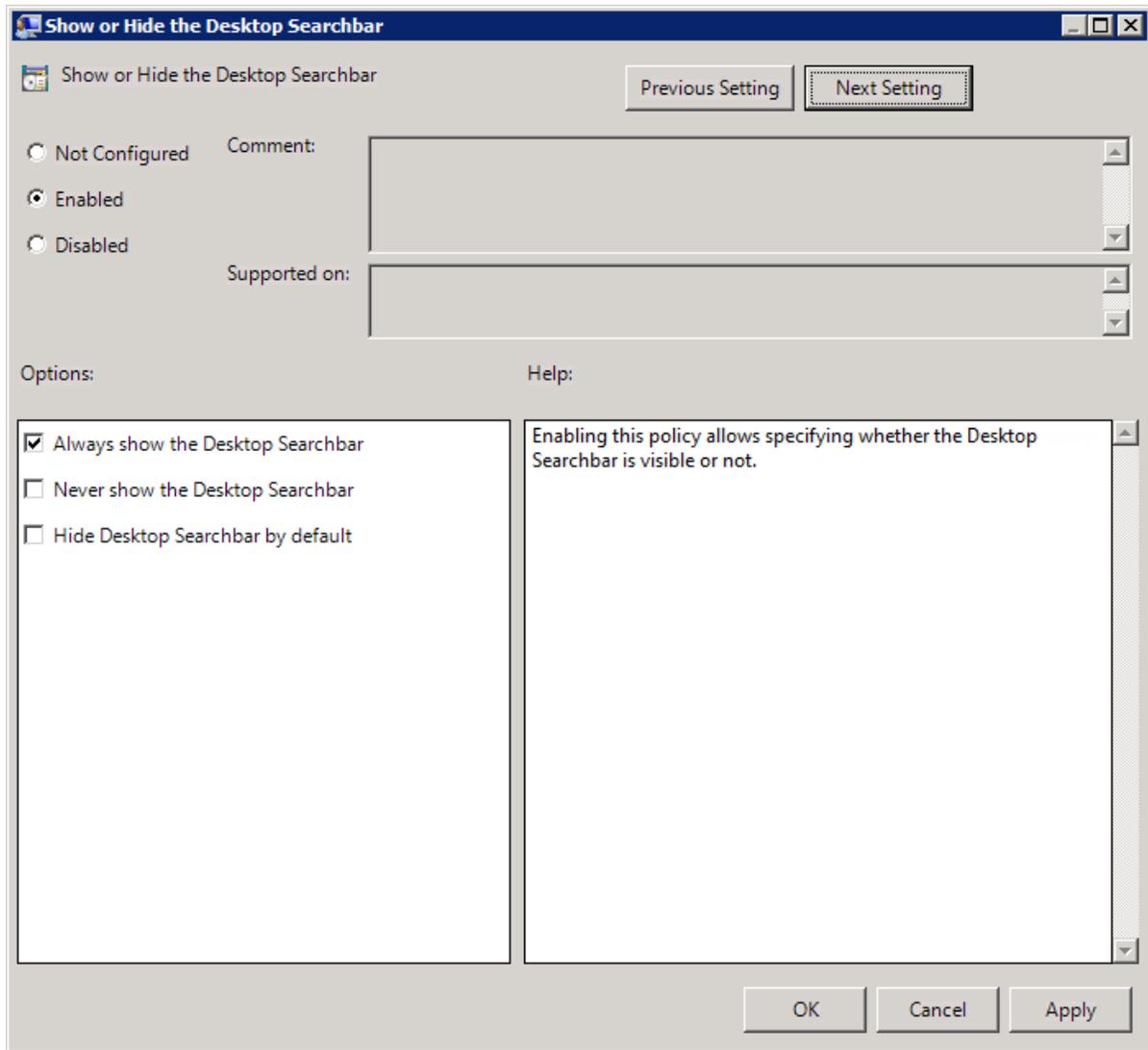
a. Select **Enabled** to specify to either always show, never show, or hide the Desktop Searchbar.

b. Under **Options**, select only one of the following options:

- **Always show the Desktop Searchbar**: The user will not be able to hide the Desktop Searchbar.

- **Never show the Desktop Searchbar**: The user will never have access to the Desktop Searchbar.

- **Hide the Desktop Searchbar by default**: The user will be able to show the Desktop Searchbar.

c. Click **Next Setting**.

8. In the **Show or Hide the Outlook Sidebar** dialog box:
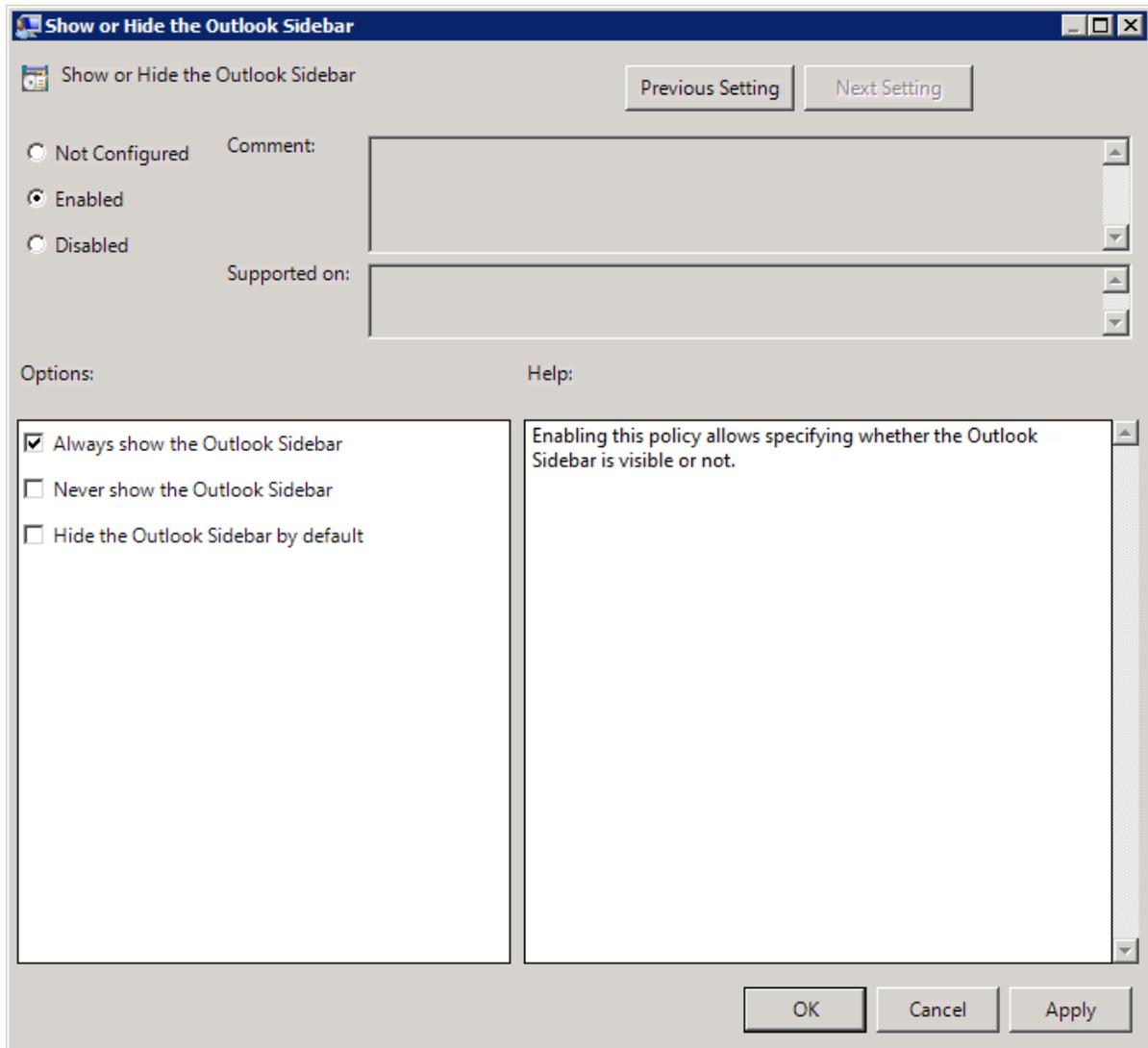
a. Select **Enabled** to specify to either always show, never show, or hide the Outlook Sidebar.

b. Under **Options**, select only one of the following options:

- **Always show Outlook Sidebar**: The user will not be able to hide the Outlook sidebar.

- **Never show Outlook Sidebar**: The user will never have access to the Outlook sidebar.

- **Hide Outlook Sidebar by default**: The user will be able to show the Outlook sidebar.

c. Click **OK**.

9. In the tree of the **Group Policy Object Editor**, expand **User Configuration** > **Administrative Templates** > **Coveo Desktop Integration Package Configuration** > **File Indexing**.

10. In the **File Indexing** panel, in the **Setting** column, double-click **Disable Remote File Indexing Override**.

11. In the **Disable Remote File Indexing Override** dialog box, when you want that end-users cannot change the

local folders to index or to exclude from indexation:
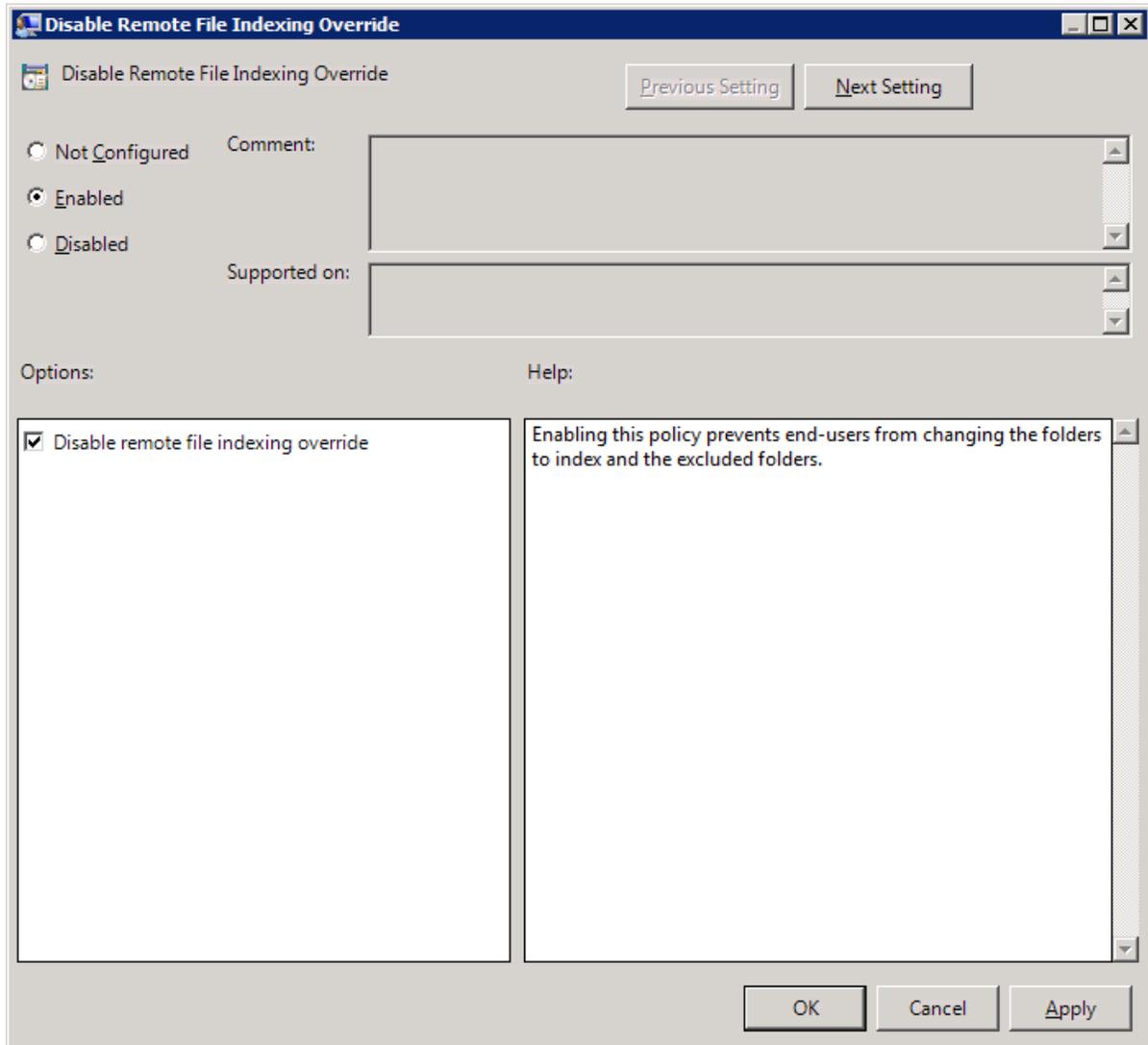


a. Select **Enabled**.

b. Under **Options**, select the **Disable remote file indexing override** check box.

c. Click **Next Setting**.

12. In the **Define Local Folders To Index** dialog box:
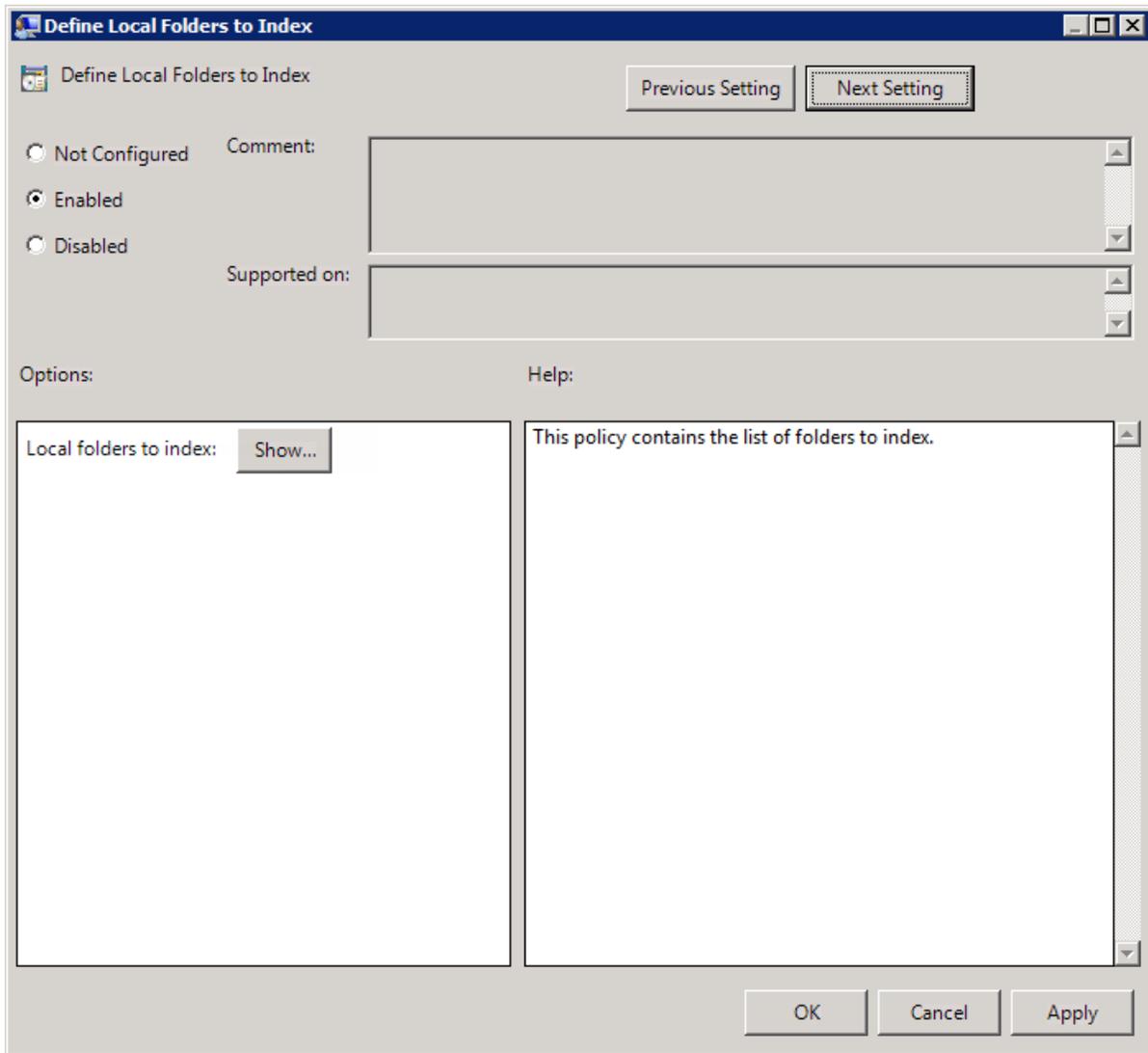
a. Select **Enabled** to force a default list of folders to index.

b. Click **Show**.

c. In the **Show Content** dialog box, for each default local folder that you want to index, enter the folder full path, and then click **OK**.

d. Click **Next Setting**.

13. In the **Define Local Folders to Exclude** dialog box:
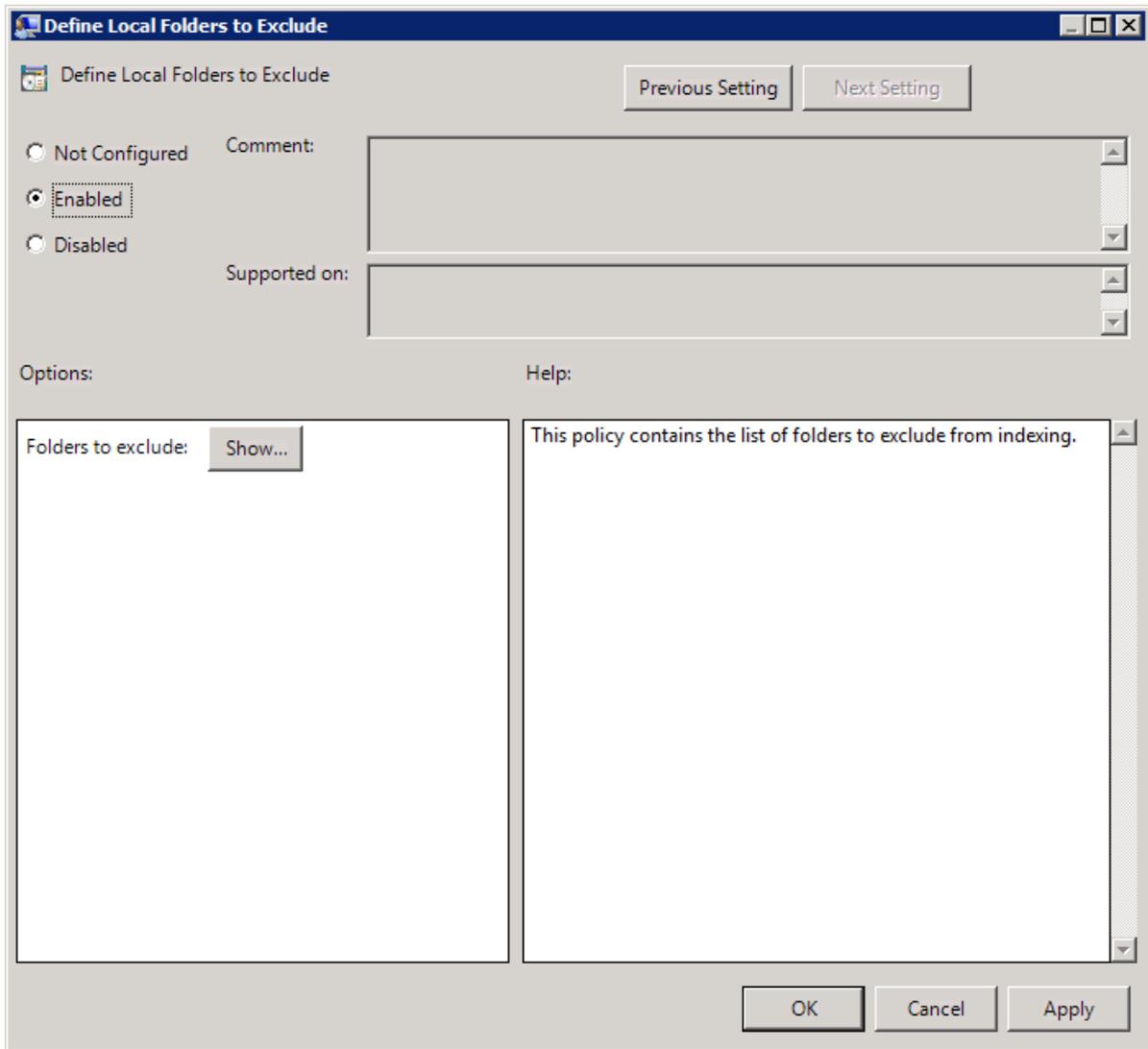
a. Select **Enabled** to force a default list of folders to exclude.

b. Click **Show**.

c. In the **Show Content** dialog box, for each default local folder that you want to exclude, enter the folder full path, and then click **OK**.

d. Click **OK**.

14. In the tree of the **Group Policy Object Editor**, expand **User Configuration** > **Administrative Templates** > **Coveo Desktop Integration Package Configuration** > **Outlook Indexing**.

15. In the **Outlook Indexing** panel, in the **Setting** column, double-click **Define PST Indexing Parameters**.

16. In the **Define PST Indexing Parameters** dialog box:
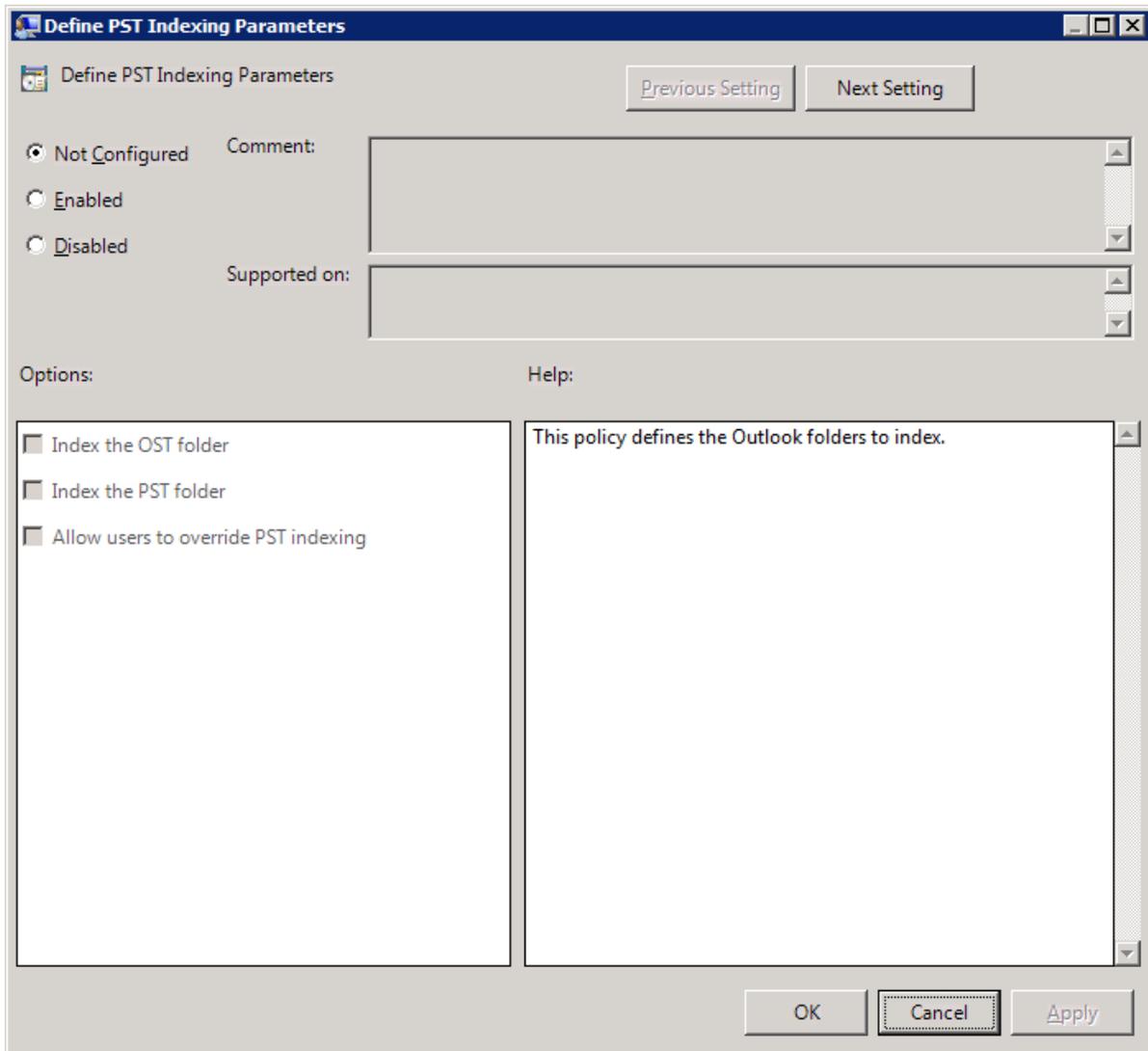
a. Select **Enabled** to set the default Outlook items to index by default.

b. Select the **Index the OST folder** check box to index the local Microsoft Exchange Offline Folders (`.ost`) mail archive files.

c. Select the **Index the PST folder** check box to index the local Microsoft Exchange Personal Folders (`.pst`) mail archive files.

d. Select the **Allow users to override PST indexing** check box when you selected the **Index the PST folder** check box but still want end-users to be able to disable it.

e. Click **Next Setting**.

17. In the **Define MAPI Profile Used for Indexing** dialog box, configure the default MAPI profile selection seen by the end-user:
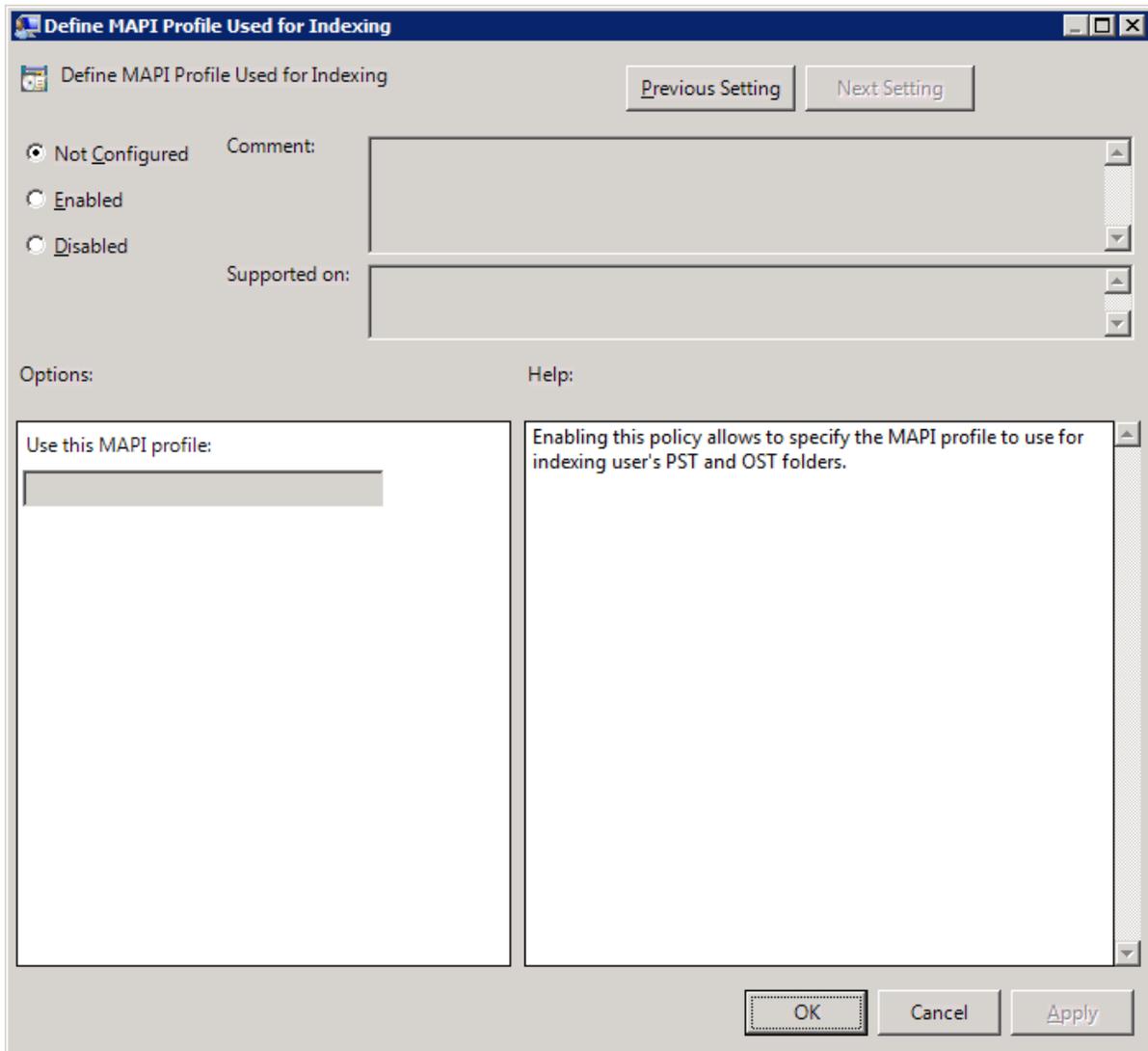
**Note:** The MAPI profile parameter is useful only when a user has more than one Outlook profile and wants to index the content of a specific one. When it is not set, the content of the default profile is indexed.

a. Select **Enabled** to force a specific profile.

b. In the **Use this MAPI profile** box, enter the name of the MAPI profile to use.

c. Click **OK**.

### 5.1.2 Desktop Integration Package GPO Administrative Template File

This topic presents the content of the administrative template file (`.adm`) that you need when you deploy the Desktop Integration Package (DIP) using the Group Policy Object method (see "Creating a DIP Deployment Group Policy Object" on page 15).

```
; ============================================================================
;
```

```
; Coveo Desktop Integration Package Administrative Template File
;
; This file contains all the settings that are necessary to configure Group Policy
; settings for the Coveo Desktop Integration Package (DIP).
;
; Copyright (c) 2012 - Coveo Technologies Inc. - All Rights Reserved.
;
; ===============================================================================
;
; -------------------------------------------------------------------------------
; Current User Section
; -------------------------------------------------------------------------------
CLASS USER

CATEGORY !!SearchBarCategory
;*********************************************************************
;GENERAL TAB OPTIONS
;*********************************************************************
  CATEGORY !!GeneralCategory
  KEYNAME "software\policies\Coveo\Search Bar"

  POLICY !!SearchPageUri_Policy
    EXPLAIN !!SearchPageUri_Explain
    PART !!SearchPageUri_EditText EDITTEXT REQUIRED
    VALUENAME "SearchPageUri"
    END PART
    END POLICY

    POLICY !!EnableRemoteIndexing_Policy
      EXPLAIN !!EnableRemoteIndexing_Explain
      PART !!EnableRemoteIndexing_CheckBox CHECKBOX
        VALUENAME "EnableRemoteIndexing"
        VALUEON NUMERIC 1
        VALUEOFF NUMERIC 0
      END PART
      PART !!HostNamePort_Text TEXT
      END PART
      PART !!HostNamePort_EditText LISTBOX VALUEPREFIX "Host"
        KEYNAME "software\policies\Coveo\Search Bar\RemoteIndexingServers\List"
      END PART
    END POLICY

    POLICY !!ShowQuickSearchBar_Policy
      EXPLAIN !!ShowQuickSearchBar_Explain
      PART !!ShowQuickSearchBar_AlwaysShowCheckBox CHECKBOX
        VALUENAME "AlwaysShowQuickSearchBar"
        VALUEON NUMERIC 1
        VALUEOFF NUMERIC 0
      END PART
      PART !!ShowQuickSearchBar_NeverShowCheckBox CHECKBOX
        VALUENAME "NeverShowQuickSearchBar"
        VALUEON NUMERIC 1
        VALUEOFF NUMERIC 0
      END PART
      PART !!ShowQuickSearchBar_HideByDefault CHECKBOX
        VALUENAME "HideQuickSearchBarByDefault"
        VALUEON NUMERIC 1
        VALUEOFF NUMERIC 0
      END PART
    END POLICY

    POLICY !!ShowSideBar_Policy
      EXPLAIN !!ShowSideBar_Explain
      PART !!ShowSideBar_AlwaysShowCheckBox CHECKBOX
        VALUENAME "AlwaysShowOutlookSideBar"
        VALUEON NUMERIC 1
        VALUEOFF NUMERIC 0
      END PART
      PART !!ShowSideBar_NeverShowCheckBox CHECKBOX
```

```
          VALUENAME "NeverShowOutlookSideBar"
          VALUEON NUMERIC 1
          VALUEOFF NUMERIC 0
        END PART
        PART !!ShowSideBar_HideByDefault CHECKBOX
          VALUENAME "HideOutlookSideBarByDefault"
          VALUEON NUMERIC 1
          VALUEOFF NUMERIC 0
        END PART
      END POLICY
   END CATEGORY
;********************************************************************
;FILESYSTEM TAB OPTIONS
;********************************************************************
   CATEGORY !!FilesystemCategory
      POLICY !!DisableRemoteFileIndexing_Policy
        KEYNAME "software\policies\Coveo\Search Bar"
        EXPLAIN !!DisableRemoteFileIndexing_Explain
        PART !!DisableRemoteFileIndexing_CheckBox CHECKBOX
          VALUENAME "DisableRemoteFileIndexing"
          VALUEON NUMERIC 1
          VALUEOFF NUMERIC 0
        END PART
      END POLICY

      POLICY !!FoldersToIndex_Policy
        KEYNAME "software\policies\Coveo\Search Bar\FoldersToIndex\List"
        EXPLAIN !!FoldersToIndex_Explain
        PART !!FoldersToIndex_ListBox LISTBOX VALUEPREFIX "Path"
        END PART
      END POLICY

      POLICY !!ExcludedFolders_Policy
        KEYNAME "software\policies\Coveo\Search Bar\ExcludedFolders\List"
        EXPLAIN !!ExcludedFolders_Explain
        PART !!ExcludedFolders_ListBox LISTBOX VALUEPREFIX "Path"
        END PART
      END POLICY
   END CATEGORY
;********************************************************************
;OUTLOOK TAB OPTIONS
;********************************************************************
   CATEGORY !!OutlookCategory
      KEYNAME "software\policies\Coveo\Search Bar"

      POLICY !!OutlookItemsToIndex_Policy
        EXPLAIN !!OutlookItemsToIndex_Explain
        PART !!IndexExchangeStore_CheckBox CHECKBOX
          VALUENAME "IndexExchangeStore"
          VALUEON NUMERIC 1
          VALUEOFF NUMERIC 0
        END PART
        PART !!IndexMAPIOnlineStores_CheckBox CHECKBOX
          VALUENAME "IndexMAPIOnlineStores"
          VALUEON NUMERIC 1
          VALUEOFF NUMERIC 0
        END PART
        PART !!UserCanChangeIndexMAPIOnlineStores_CheckBox CHECKBOX
          VALUENAME "UserCanOverrideIndexMAPIOnlineStores"
          VALUEON NUMERIC 1
          VALUEOFF NUMERIC 0
        END PART
      END POLICY

      POLICY !!MAPIProfileName_Policy
        EXPLAIN !!MAPIProfileName_Explain
        PART !!MAPIProfileName_EditText EDITTEXT REQUIRED
          VALUENAME "MAPIProfileName"
        END PART
```

```
     END POLICY
   END CATEGORY
END CATEGORY

; ++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++
; Strings
; ++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++++

[Strings]
SearchBarCategory="Coveo Desktop Integration Package configuration"

GeneralCategory="General"

SearchPageUri_Policy="Set URI for the Search Page Used"
SearchPageUri_Explain="Enabling this policy and setting it to a URI defines the search page that will
be used."
SearchPageUri_EditText="Search page URI:"

EnableRemoteIndexing_Policy="Allow Indexing on a Remote Server"
EnableRemoteIndexing_Explain="This policy allows the indexing of desktop or laptop computer content on
one or more remote servers. When this policy is enabled, you must specify at least one remote server
using the hostname:port form. When no port is specified, the default port (1980) is used. The port
must be the same as the one used by the Desktop connector."
EnableRemoteIndexing_CheckBox="Index local documents and items on a remote server"
HostNamePort_Text="\nSpecify servers using the hostname:port form."
HostNamePort_EditText="Set remote server name and port:"

ShowQuickSearchBar_Policy="Show or Hide the Desktop Searchbar"
ShowQuickSearchBar_Explain="Enabling this policy allows specifying whether the Desktop Searchbar is
visible or not."
ShowQuickSearchBar_AlwaysShowCheckBox="Always show the Desktop Searchbar"
ShowQuickSearchBar_NeverShowCheckBox="Never show the Desktop Searchbar"
ShowQuickSearchBar_HideByDefault="Hide Desktop Searchbar by default"

ShowSideBar_Policy="Show or Hide the Outlook Sidebar"
ShowSideBar_Explain="Enabling this policy allows specifying whether the Outlook Sidebar is visible or
not."
ShowSideBar_AlwaysShowCheckBox="Always show the Outlook Sidebar"
ShowSideBar_NeverShowCheckBox="Never show the Outlook Sidebar"
ShowSideBar_HideByDefault="Hide the Outlook Sidebar by default"

FilesystemCategory="File Indexing"

DisableRemoteFileIndexing_Policy="Disable Remote File Indexing Override"
DisableRemoteFileIndexing_Explain="Enabling this policy prevents end-users from changing the folders
to index and the excluded folders."
DisableRemoteFileIndexing_CheckBox="Disable remote file indexing override"

FoldersToIndex_Policy="Define Local Folders to Index"
FoldersToIndex_Explain="This policy contains the list of folders to index."
FoldersToIndex_ListBox="Local folders to index:"

ExcludedFolders_Policy="Define Local Folders to Exclude"
ExcludedFolders_Explain="This policy contains the list of folders to exclude from indexing."
ExcludedFolders_ListBox="Folders to exclude:"

OutlookCategory="Outlook Indexing"

OutlookItemsToIndex_Policy="Define PST Indexing Parameters"
OutlookItemsToIndex_Explain="This policy defines the Outlook folders to index."
IndexExchangeStore_CheckBox="Index the OST folder"
IndexMAPIOnlineStores_CheckBox="Index the PST folder"
UserCanChangeIndexMAPIOnlineStores_CheckBox="Allow users to override PST indexing"

MAPIProfileName_Policy="Define MAPI Profile Used for Indexing"
MAPIProfileName_Explain="Enabling this policy allows to specify the MAPI profile to use for indexing
user's PST and OST folders."
MAPIProfileName_EditText="Use this MAPI profile:"
```

## 5.2 Deploying the Desktop Integration Package Using a Login Script

The login script method for the Desktop Integration Package (DIP) deployment consists in creating a login script that starts the DIP installer when it detects that the DIP is not already installed on the end-user computer on which a user logs in.

**Note:** You can still use GPO to remotely set the DIP configuration for all users.

### To deploy the DIP using a login script

1. Download the latest DIP version.

   **Note:** Ensure that you are currently using recent versions of CES and Coveo .NET Front-End and consider upgrading to their latest version to prevent compatibility issues (see Coveo Platform Software Installation). Contact Coveo Support for more information.

2. Copy the DIP installer to a network location available from a login script for all users.

3. Using a text editor:

   a. Create a login script that starts the DIP installer only when the DIP is not already installed on the computer using the following commands:

   ```
   REM DETECT IF THE PACKAGE IS ALREADY INSTALLED ON WINDOWS XP
   IF exist "%Userprofile%\Local Settings\Application Data\Coveo\Coveo Desktop Integration
   Package\Extensibility.dll" goto END
   REM DETECT IF ALREADY INSTALLED ON WINDOWS VISTA AND WINDOWS 7
   IF exist "%LOCALAPPDATA%\Local\Coveo\Coveo Desktop Integration Package\Extensibility.dll" goto
   END
   "[path]\Coveo Desktop Integration Package.exe"
   :END
   ```

   where you replace `[path]` (in the last line before `:END`) by the path where you saved the DIP installer.

   **Note:** You can use the `.exe` installer file with the `/nocloseapplications` command line to update the DIP without requiring Outlook to be closed and restarted.

   b. Save the file with a `.bat` extension in the folder that corresponds to the domain controller's Netlogon shared folder.

## 5.3 Manually Deploying the Desktop Integration Package

The manual method for the Desktop Integration Package (DIP) deployment simply consists in making the DIP installer available to your end-users and relies on them to install and configure the DIP.

**Note:** With this method, all DIP features are enabled to all end-users. You cannot enable/disable or pre-configure folders to index as you can do with the GPO method.

To manually deploy the DIP

1. Download the latest DIP version.

   **Note:** Ensure that you are currently using recent versions of CES and Coveo .NET Front-End and consider upgrading to their latest version to prevent compatibility issues (see Coveo Platform Software Installation). Contact Coveo Support for more information.

2. Save the DIP installer to a location available to all your end-users.

3. Inform your end-users of the availability of the DIP installer and provide instructions to install and configure the DIP.

## 5.4 Automatically Updating the DIP on All Computers

The Desktop Integration Package (DIP) comes with a built-in feature that periodically checks for available DIP updates. All you have to do is copy the new DIP installer file to a specific location on the Coveo .NET Front-End server with which the DIP communicates. The DIP does the rest.

**Note:** Desktop Integration Package 12.0.1840+ (June 2016) If you use a JavaScript user interface (e.g., the search page that comes with the Coveo Search API install kit) in the DIP, when a new DIP version will become available, ask your IT department to overwrite the DIP install kit in the file share folder to which the GPO is referring, and force a GPO update to update the DIP on your user machines.

Here is how it works:

- A user starts the DIP (it typically starts automatically after starting Windows).

- One minute after starting, and every four hours while running, the DIP checks for the availability of a new DIP installer version at the following URL:

  ```
  http://[FrontEndServer]/coveo/anonymous/searchbar/Coveo Desktop Integration
  Package.exe
  ```

  where `[FrontEndServer]` is the server defined in the **URL of the search page** box for the DIP configuration.

- When a new installer version is available, the DIP automatically starts the installer and the user sees a **Coveo Desktop Integration Package Update** dialog box.
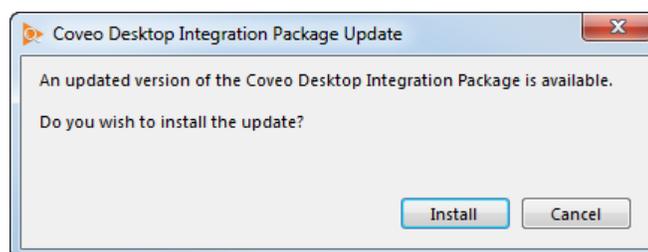


- The user can decide to perform the update immediately or cancel it, in which case the dialog box will appear again every four hours while the DIP is running.

With this mechanism, all active DIP users will be offered to update within a few hours.

To automatically update the DIP

**Important:** This procedure only applies when you integrated a Coveo .NET Front-End search page in the DIP. You must ask your IT department to create a GPO to automatically update a DIP integrated with a Coveo JavaScript Search page.

1. Using an administrator account, connect to the Coveo .NET Front-End server from which the DIP gets search results. This is the server defined in the **URL of the search page** box for the DIP configuration.

2. Download the latest DIP version.

   **Note:** Ensure that you are currently using recent versions of CES and Coveo .NET Front-End and consider upgrading to their latest version to prevent compatibility issues (see Coveo Platform Software Installation). Contact Coveo Support for more information.

3. Copy the new `Coveo Desktop Integration Package.exe` file in the following folder (replacing an older one if it was there):

   ```
   C:\Program Files\Coveo .NET Front-End 12\Web\Coveo\Anonymous\SearchBar\
   ```

   The installer file in this folder corresponds to the following URL:

   ```
   http://[FrontEndServer]/coveo/anonymous/searchbar/Coveo Desktop Integration
   Package.exe
   ```

4. On a computer on which the DIP is installed, start the DIP to test that you get the **Coveo Desktop Integration Package Update** dialog box.

# 6. Managing Desktop Connector Remote Clients

Once a Desktop source is created, started, and the Desktop Integration Package (DIP) is deployed to end-user computers, you can manage remote DIP clients that are using the Desktop connector. This is done from the **Remote Clients** page in the Coveo administrator where you can rebuild, refresh, delete indexed documents, as well as delete and disable remote DIP clients.

## To manage remote clients

1. On the Coveo server, access the Administration Tool.

2. Access the **Remote Clients** page:

   a. Select **Index** > **Sources and Collections**.

   b. In the **Collections** section, select the collection that contains the Desktop source.

   c. In the **Sources** section, select the Desktop source.

   d. In the navigation panel on the left, click **Remote Clients**.

3. In the **Remote Clients** page:



   a. In the **Filter** box, you can enter text to refine the displayed list of remote DIP clients.

      **Example:** Enter `martin` in the **Filter** box to only see clients whose name include *martin*.

   b. Select the check box of one or more remote DIP clients to which you want to apply an action.

   c. In the **Actions** drop-down list, select one of the following actions:

**Rebuild**

Select to re-index the whole content of local folders to index, even if nothing has changed. The rebuild takes place as soon as the remote DIP client is connected. In the meantime, the documents remain searchable.

**Refresh**

Select to only index modified, renamed, or moved documents. The refresh takes place as soon as the remote DIP client is connected. In the meantime, the documents remain searchable.

**Delete Documents**

Select to remove all indexed documents from the selected remote DIP client computers. Documents will not be searchable until they are re-indexed.

**Delete**

Select to delete the remote DIP client entry, document count statistics, and all related indexed documents.

**Disable**

Select to prohibit a remote DIP client from indexing documents.