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Copernic Desktop Search Corporate
Deployment guide

Search and Discover

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Introduction

This document explains the requirements, limitations and suggested steps to follow when a network administrator wants to deploy Copernic Desktop Search Corporate to his network.

Please note that the setup described below explains the way that CDS Corporate is meant to be deployed and the way Copernic will offer most support for. However, in the case of single installs where no network deployment is used, it is not required to use the deployment methodology described below.

This document is provided for informational purposes.

Recommended Deployment Methodology

Preparation
- Read the CDS Deployment Guide.
- Check corporate system standards to make sure that they meet minimum system requirements for CDS.
- Determine users indexing needs:
    - Local folder needs (My Documents, e-mail, and other folders).
    - Information that may be available on other network shares or sites.
    - Security and access to data (determine if shares or network resources would need to be blocked for some users and made available to others).
    - Types of files to be indexed (determine if some file types should not be indexed)

Controlled Testing
- Test the software in a controlled test environment using your company's standard system configuration which includes the operating system, commonly installed software and network resources.
- Review the test results to determine the best practices and to plan a pilot test.

Pilot Testing
- Perform a pilot test using a department or a small group of users and monitor the following for any problems or issues:
    - Deployment
    - Network load/performance
    - Server loads/performance
    - Conflicts with other software
    - User requirements and comments
    - Unexpected errors or issues
- Follow-up on the result of the pilot test:
    - Resolve and document any challenges encountered.
    - Revise your deployment plan and policies as required.
    - Create and document a plan for final deployment.

Final Deployment
- Define requirements for helpdesk and end-user training.
- Determine deployment plan.
- Create and then deploy policies for computers and users.
- Deploy Copernic Desktop Search in accordance with the deployment plan.

Pre-Installation Considerations

Before installing Copernic Desktop Search, an administrator must consider the following:
- System requirements
- Group Policy
- Providing enterprise-specific defaults
- Enterprise search integration
- Impact to Exchange Servers
- Network performance – potential bandwidth impact

In this section, we will look at these factors and explain how Copernic Desktop Search may work for each situation.

System Requirements

- **Operating System:** XP SP2 or Vista.
  Note Only 32-bits operating systems were supported at the time this documentation was created.
- **Browser**: Internet Explorer 6.0 SP2 or later.
- **CPU**: Pentium 120 MHz or higher
- **Hard Disk:**
    - • Program: at least 20 MB of free disk space during the installation.
    - • Index: 250 MB is recommended. The index size will vary according to the number and type of documents indexed.

For email indexing, we recommend the following:
- Microsoft Outlook
- Outlook Express
- Windows Mail
- Eudora
- Thunderbird
- Lotus Notes 7.0.2 or later

Note We recommend using Outlook in cached mode.

Group Policy Objects

Group Policy Objects (GPO) allow network administrators to manage software from a single point and publish configuration changes and updates to their users. Multiple policies are available to configure options, indexing and search behavior. A possible use of Group Policies is to force a configuration to a group of users. This way, only the network administrator could modify this configuration.

In order to set up an efficient deployment of CDS using Group Policies, a thorough study of the structure to apply must be done beforehand. Taking the time to organize the deployment groups will increase your chances in meeting your users' requirements.

Intranet Search Integration

CDS provides policies that allow the IT administrator to specify an intranet search location. Once these policies are applied, users will now have the possibility to perform intranet searches from within the Copernic Deskbar or the new Intranet tab in the main application window.

Among the Intranet Policies, you will find the possibility of generating an Intranet tab with your company's icon and your desired label so your users may easily recognize the feature at a glance.

Microsoft Outlook\Exchange and Copernic Desktop Search

CDS supports Outlook indexing in both cached and uncached mode. However, we recommend using CDS with Outlook set in cached mode in order to limit server access.

With Microsoft Office Outlook 2003 and later running in cached mode, CDS searches the e-mail messages and attachments that are stored locally on the user's computer. This type of indexing greatly reduces the extra load on the Exchange server and reduces the network bandwidth. However, connections to the server are still made to allow "on the fly indexing" (monitoring for new items)

If needed, Microsoft Office Outlook 2003 and later versions can be configured via group policy to enforce cached mode. Fore more information, please refer to Microsoft's documentation on the subject.

Email indexing Policies are available in order to block or enable different email software. Please refer to "*CDS Corporate - GPO documentation.doc"* for more information.

Network Indexing

You may want to let users index network shares and other network resources. However, this possibility may come at a cost. This may increase the network traffic to these locations while the users' systems are performing their initial indexing. A lower traffic will be seen during index updates.

While you can limit network indexing through Group Policies, you may also want to completely block access to network indexing. A number of Group Policies are available in order to set up network indexing exactly as you need it.

Throttling of network files and emails

Policies are available in order to regulating the rate at which the application network indexing is conducted. Please refer to "*CDS Corporate - GPO documentation.doc"* for more information.

Multiple User Profiles

Each user on a machine will have his or her index created in their profile. However, this index will not follow the user if he or she logs on to another machine. The index is specific to a machine and will need to be created each time a user logs on to a new PC.

Installation considerations

CDS is made available as a single Windows Installer (.msi) file and as a self-executing (.exe) file. For network deployment, it is suggested to use the .msi installer. The .exe version is provided for convenience purposes.

Copernic Desktop Search must be installed by a user who has administrator permissions on the computer. If you are prompted to restart your computer after you install CDS as part of a stand-alone installation or upgrade, we recommend that you do restart the computer.

In an enterprise environment, CDS can be deployed to all users at the same time using a deployment tool such as Active Directory.

Once installed, a shortcut is added to the Start menu and on the Desktop. Also, the CDS Deskbar is automatically displayed and CDS is set to run automatically when the computer starts. This option may be turned off using Group Policies or in the tool's options window.

Upgrading from Copernic Desktop Search Home

CDS Corporate does not take into consideration the possibility that CDS Home could be installed on a PC. Those are two completely different products which can be installed on the same machine.

Un-installation of any earlier version of CDS is recommended prior to the installation of CDS Corporate. Installing CDS Corporate on a PC that already has CDS Home installed will result in having two Desktop Search tools at the same time.

Any future version of CDS Corporate will upgrade earlier versions of the same line of product. As for the Home, it will upgrade only the Home product line.

Deployment Modes

CDS can be deployed in attended mode or unattended mode depending on the level of interaction you want your users to have with the software during the installation. You may choose the preferred mode by selecting to push the installer per user or per machine.

Attended Mode
In Attended Mode, the user will be prompted to interact with the installation and/or setup process.

Using the domain controller, when pushing the MSI installer per user, shortcuts will be created on the desktop during login, but the installation will not take place until the user launches the software through the shortcut. After installation, if the policy "Silent Initial Setup" is not enabled, the user will be asked to setup CDS according to his preferences.

When pushing the MSI installer per computer, the installation will take place at logon. However, if the policy "Silent Initial Setup" is not enabled, the user will be asked to setup CDS according to his preferences.

Unattended Mode
If no user interaction with the installation and setup process is desired, the MSI installer needs to be pushed per computer. This way, the installation will take place at logon. Also, in order to make sure the user isn't asked to perform the setup, the policy "Silent Initial Setup" must be enabled. This way, CDS will be installed with the default setup values if no other policy is enabled. If other policies are enabled, CDS will be configured using the new values.

Customizing CDS with Group Policy

Group Policy Overview

CDS Corporate fully supports Group Policy. Administrators can use Group Policy to apply one or more configurations to targeted computers by using the administrative template file (.adm file) which provides the available policy settings. CDS supports machine based group policies as well as user based policies.

Policies descriptions

Copernic Desktop Search Corporate comes with multiple GPOs.
Please refer to document named "*CDS Corporate - GPO documentation.doc*".

Policies States

Enterprise default settings may be forced to computers in order to preserve a homogenous environment. When such settings are pushed, if the user tries to change the setting, the setting is not visible or is unavailable.

Policies have 3 possible states when previewed in the group policy administration system:
- Enabled
- Disabled
- Not Configured

Enabled and Disabled may have various effect, depending on the policy that is being set. Please refer to the "*CDS Corporate - GPO documentation.doc"* documentation for further information on each state.

As for Not Configured, this state means that the policy will be reverted back to its default value.

Policies Location

When a policy is set, a key is created in the registry. Policies can be set per user or per computer through the active directory. Policies that are set per computer are created under the following section of the registry:
- HKLM\Software\Policies\Copernic\DesktopSearch2Corpo

Policies that are set per user are created under the following section of the registry:
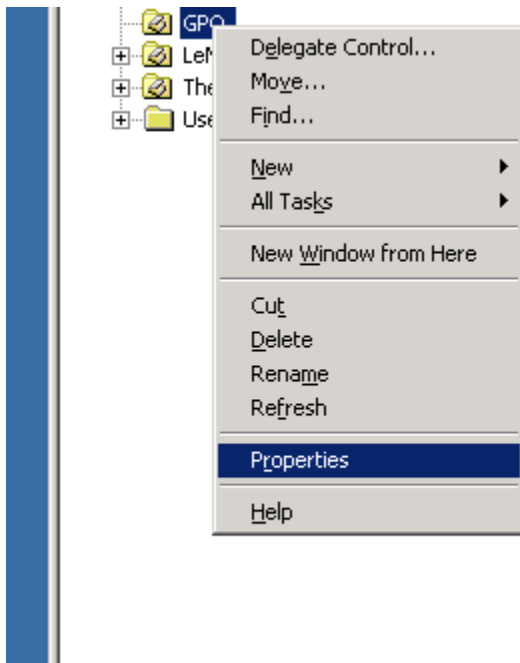- HKCU\Software\Policies\Copernic\DesktopSearch2Corpo

If no policy is applied, the associated key will not be created in the registry.
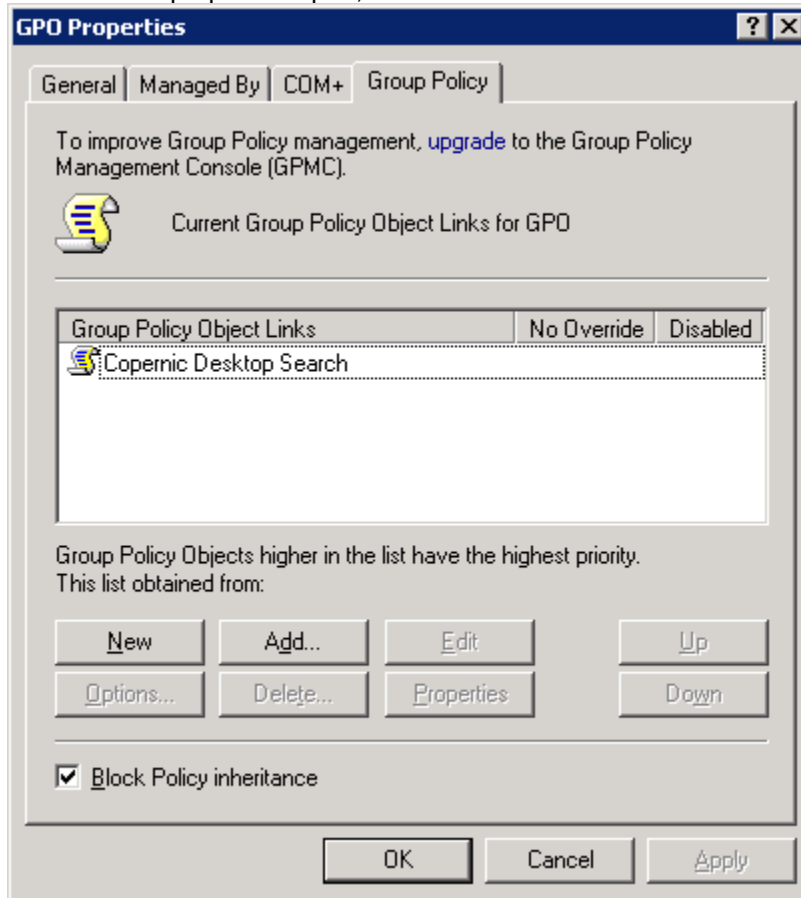
Setting up the ADM file and GPOs

Setting up the organizational unit

An organizational unit is a group of users and/or computers to which GPOs (Group Policy Objects) will be assigned for specific software. In order to create an organizational unit, follow these steps:

1- Log on to the domain controller.
2- Open the active directory software (such as Microsoft management console).
3- Create a new organizational unit (Right click on domain root→new→ organizational unit) or use one already existing.
4- Right click on the GPO folder and select properties from the drop down list.

5-   Once the properties open, select the GPO tab then click on new and give it a name.

Adding users to the group
6- Return to the active directory console (should still be open) and add the desired USER/COMPUTER to the group. Right click on the query-based distribution group then new→user or new→computer. This will set to which user/computer the package and GPOs will be pushed. This operation can also be performed with a drag and drop from the computer and/or user list.
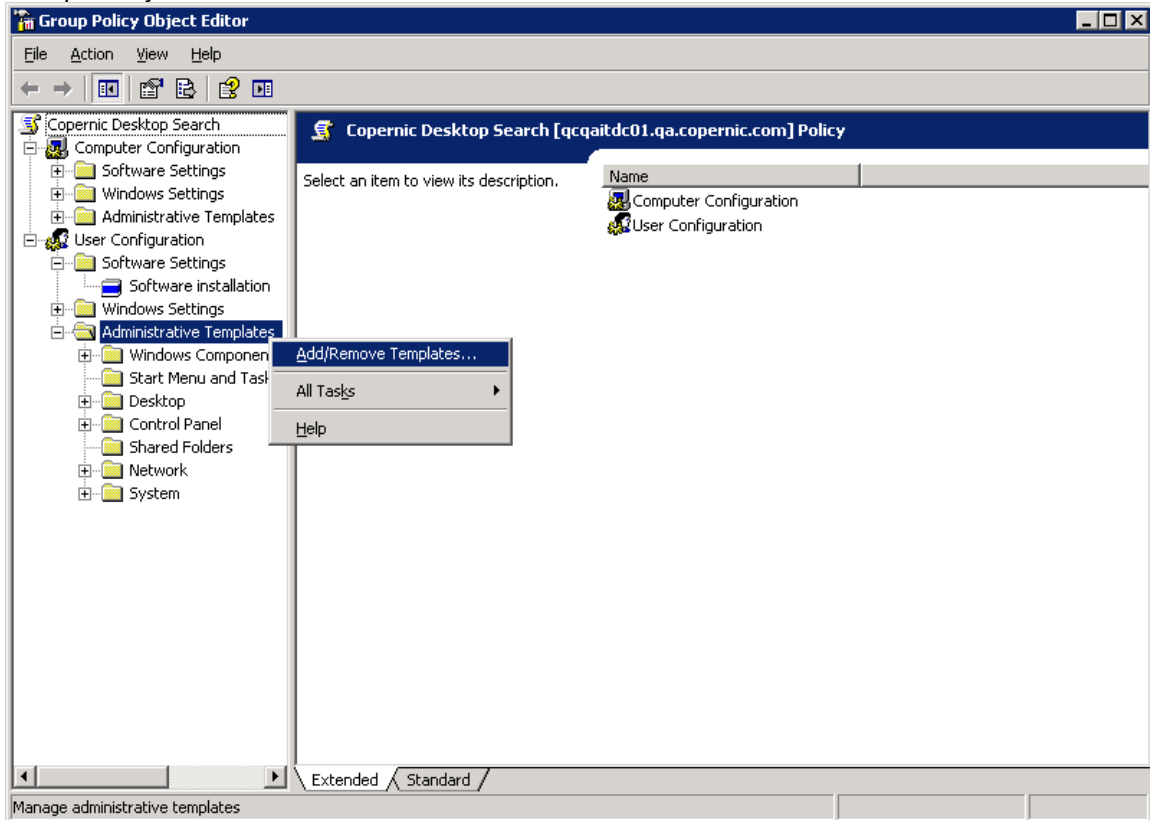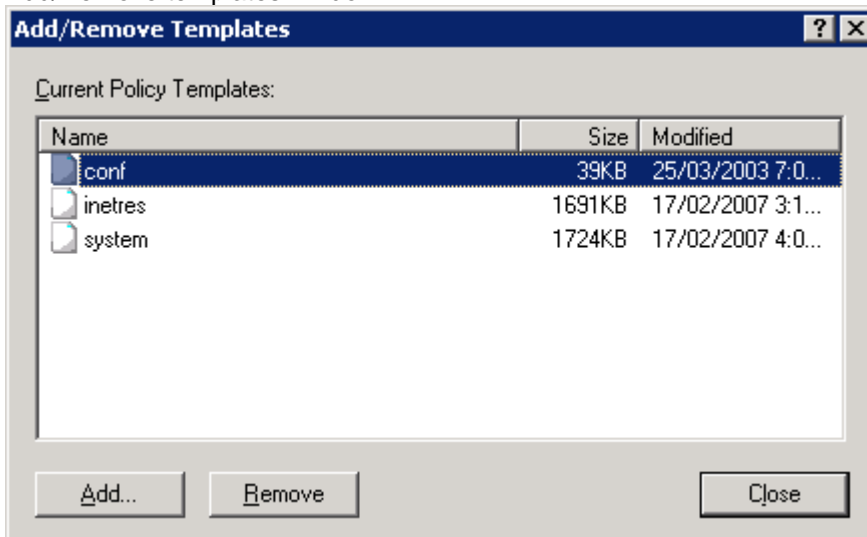
Adding an ADM, GPO settings and the package
7- From the distribution group's properties window, select the new GPO group and click on EDIT, this will open a new window from where you will be able to handle the GPOs, the package and the ADM file.
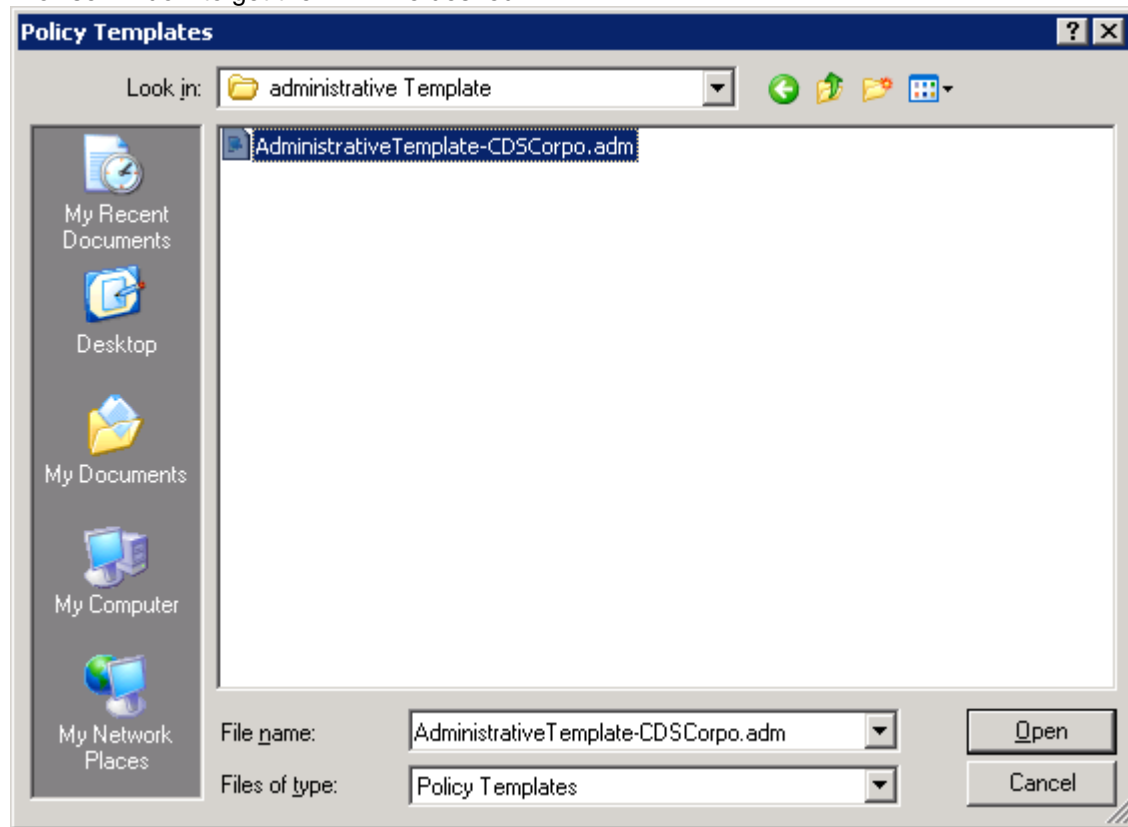
Adding the ADM template

8- Copy the ADM file(GPO template) in C:\WINDOWS\inf
9- In the Group Policy Console add the new template. This should be done in the folder named "administrative template" under the distribution group tree.

Group Policy console

Add/Remove templates window

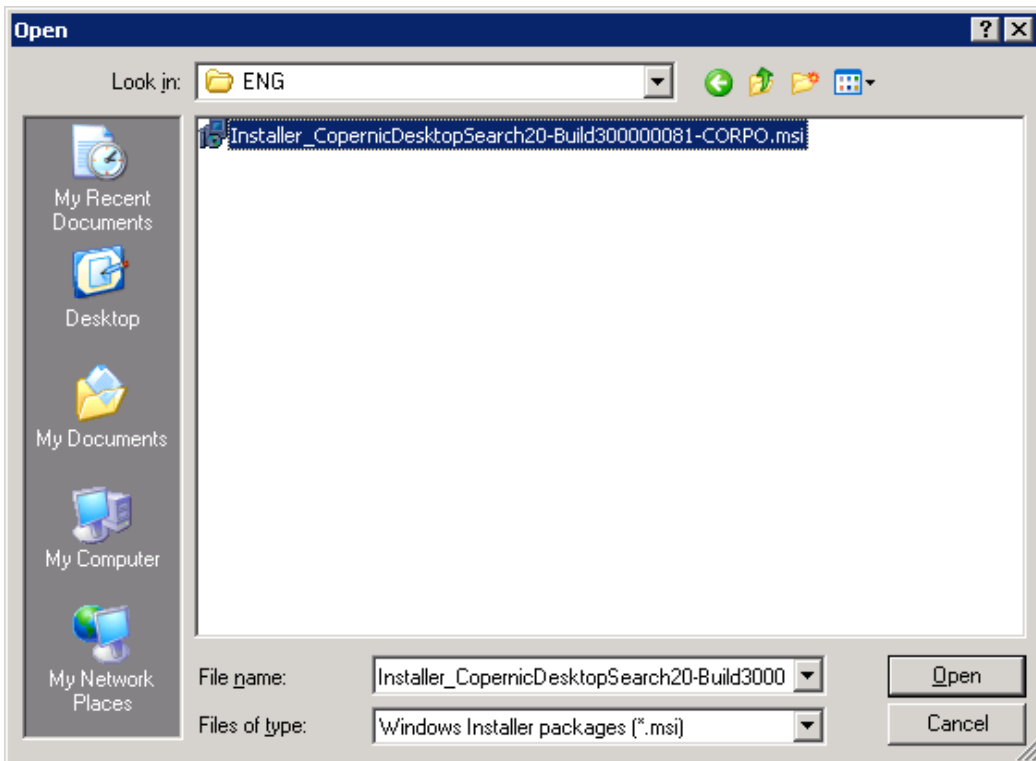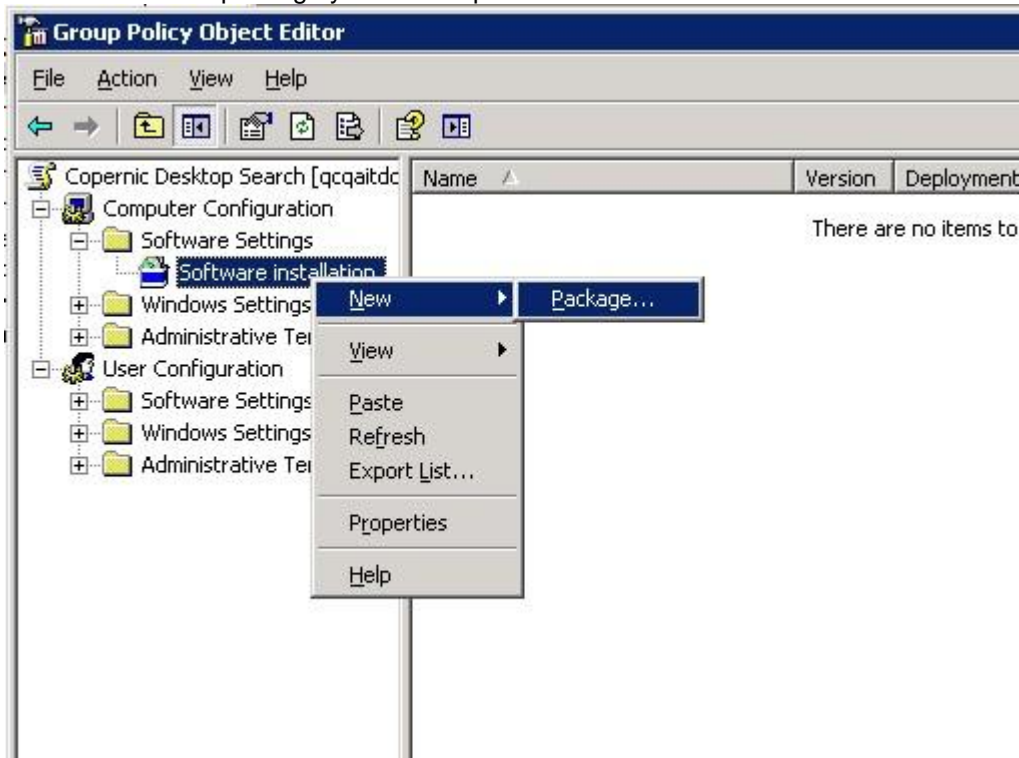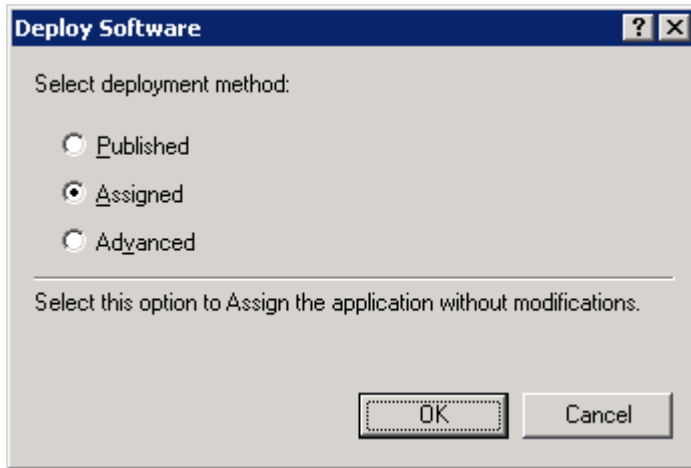Browse window to get the ADM file desired

Setting up GPO configuration

10- Once added, select the new template and browse its different folder. It will be under "Administrative Template-> Copernic Desktop Search Corporate". This is where it is possible to configure the GPO settings.

Adding the package

11- Now you are ready to add the package. The package will be pushed to any user/computer previously set. (See step 6). To do so right click on Software settings→Software Installation. Then click on new→Package. Once done, browse and select the package you want to push via GPO.
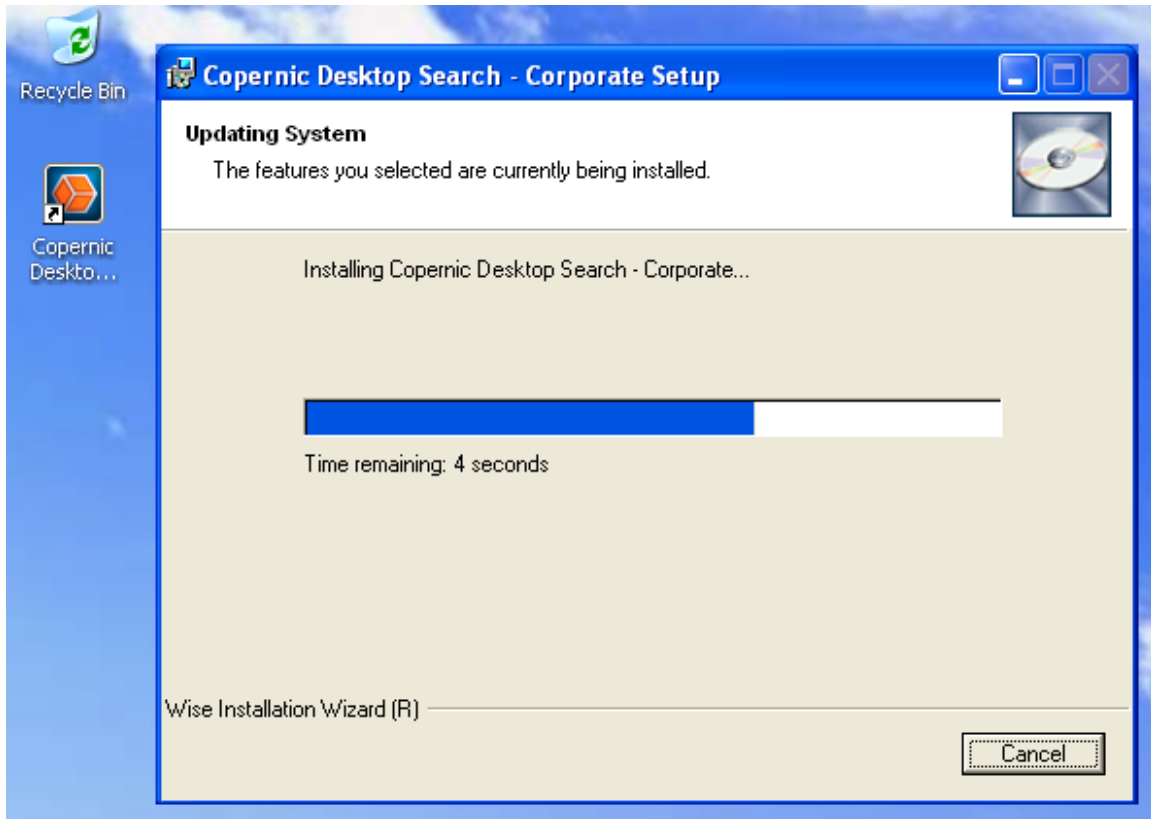
12- After selecting the package, select the "Assigned" method then click ok. Selecting "assigned" will automatically install the package when it is pushed, while "published" adds the tool in add/remove programs and users must go there to launch the installation.

User setup

    13- Log on the desired user, an icon of Copernic Desktop Search should be available on the desktop. Double clicking on it will either launch the installation or finish the configuration, whether the tool was pushed in attended or unattended mode. If unattended mode is used and the GPO setting "Silent initial setup" is enabled, the user will be asked to wait during configuration.
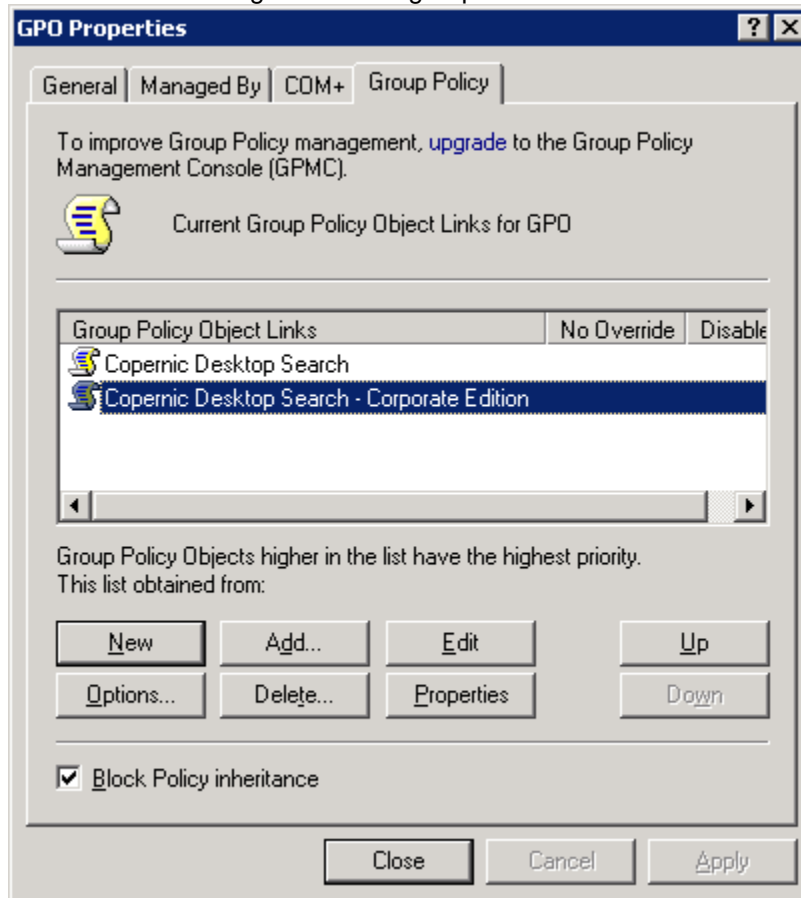

After installation
After these steps are completed, Copernic Desktop Search is installed and configured like desired through the GPO settings. The user will not have to do anything and will get the same configuration as all users added in step 7.
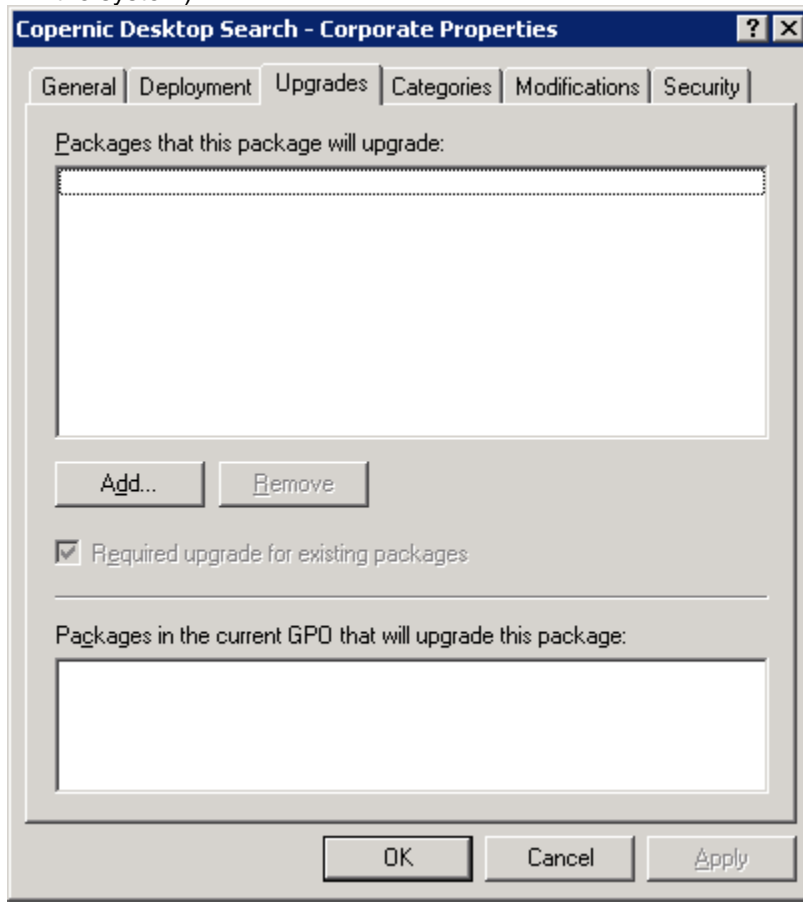
Upgrading Existing Installations

To upgrade an existing installation of Copernic Desktop Search - Corporate, simply edit the distribution group to which you want to apply the upgrade and add the new package to it.

1. Select an existing distribution group and click on Edit
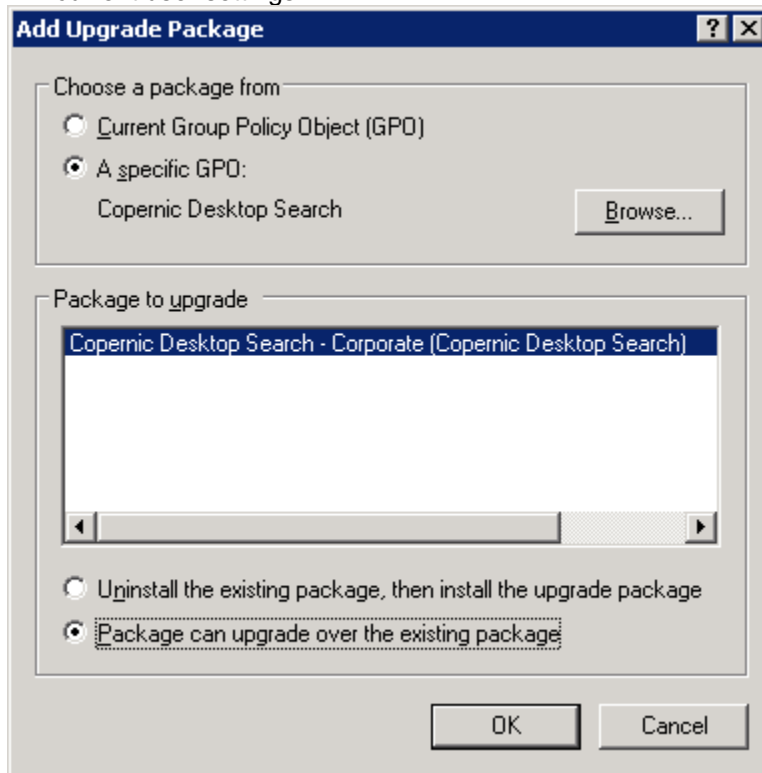

2. Add a new package in this group for the new version's msi file. See previous section for more information on how to do this.
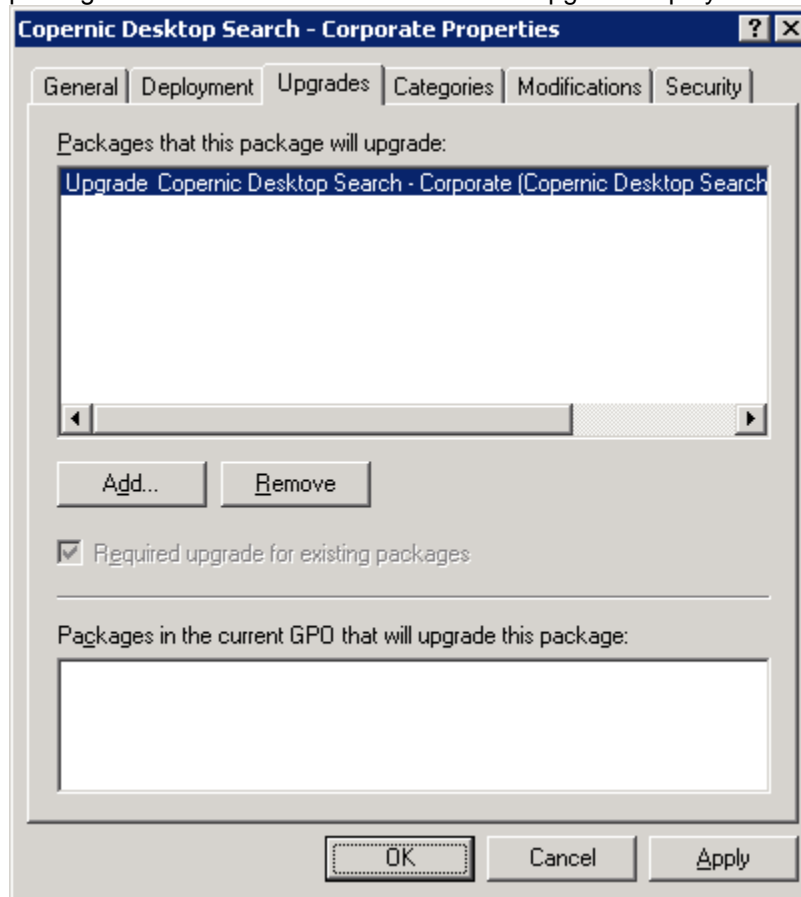
3. Edit the properties of the new package. In the "Upgrades" tab, add the previous package in the "Packages that this package will upgrade" box (this may be automatically done by the system).

Copernic Desktop Search - Corporate Properties

General | Deployment | Upgrades | Categories | Modifications | Security

Packages that this package will upgrade:

Add...   Remove

☑ Required upgrade for existing packages

Packages in the current GPO that will upgrade this package:

OK   Cancel   Apply

4. In the "Add Upgrade Package" window, you will be prompted to select whether you want to uninstall the previous package before the upgrade or to upgrade over it. It is recommended to upgrade over the existing package as it is the only way to keep the current user settings.

5. In the properties of the new package, make sure the "Required upgrade for existing packages" checkbox is checked to force the upgrade deployment.

Customizing CDS with the Customization kit

The Customization kit is a standalone tool that allows administrators to manage Web shortcuts or Internet/Intranet tabs that integrate into CDS and its deskbar.

The Customization kit is bundled in the Copernic Desktop Search – Corporate package. Please refer to the help section of the tool for more information on how it works.

Known issues

While we are dedicated to provide the best Desktop search software, it may occur that some issues remain. Note that we are constantly working to improve our software and that a fix for the following issues may be provided in a future release.

Deploying a package of a different language

Description

You may experience installation corruptions when doing the following:

1. Deploy an msi package through GPO in unattended mode (per computer)
2. Complete the setup
3. Deploy the msi package of another language through GPO in attended mode (per user)
4. Try to complete the installation

NOTE: this issue occurs only when the two following conditions are true:
- o The new package deployed is in another language
- o The new package is deployed using another deployment mode

If this situation occurs, manual un-installation will be required.

Workaround

Uninstall the previous version before proceeding to the installation of the new msi package. This can be done by using the "Uninstall the existing package, then install the upgrade package" setting.