Perceptive Workgroup Search

Installation, Upgrade, and Setup Guide

Version: 10.5

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Perceptive Workgroup Search Overview

Perceptive Workgroup Search enables rapid retrieval of information contained across disparate data sources, and the ability to complete actions on the search results such as emailing, zipping, or exporting the necessary information. A single Perceptive Workgroup Search query lets a user quickly and simultaneously search across a wide range of structured, semi-structured, and unstructured formats, including email, word processing documents, spreadsheets, PDF files, XML data, and web pages. Perceptive Workgroup Search provides the following primary features:

Index. Recognizes and indexes more than 400 file formats. You specify the computers, folders, and files to include in the index, where to locate the index, and when index updates occur.

Search. Supports both simple and sophisticated searching mechanisms to enable a user to quickly locate documents. Search methods include Web-style, Natural Language Query, Fielded, Phrase Matching, and Menu-Assisted Query.

Refine results. Provides the ability to refine search results through automatically generated groupings, such as entity names extracted from the documents, or through groupings that you define based on metadata assigned to the documents.

Retrieve. Enables a user to preview a document's contents before opening it. Preview features include a built-in preview pane that offers hit highlighting and hit-to-hit navigation.

Display. Displays a document in the Perceptive Search Browser or in the document's original application. A user can annotate a document with virtual notes or attach files, such as a photo, video, or sound file, without altering the original document.

Action. Enables a user to tag or transform documents. A user might, for example, color flag documents for later review or for review by other users. A user could also extract data to another file format and zip one or more search results.

Prepare for the installation or upgrade

These instructions enable you to install Perceptive Workgroup Search directly on the local computer and then distribute it to users. To upgrade from a previous version of Perceptive Workgroup Search, refer to Upgrade Perceptive Workgroup Search. Additional information is also available in the *Release Notes* available on the Customer Portal of the Lexmark website at www.lexmark.com.

Decide on a 32-Bit or 64-Bit Installation

Perceptive Workgroup Search is available as either a 32-bit or a 64-bit application. The choice, as to which installer to use, typically comes down to the version of Microsoft Office you have installed. If you intend to index your Outlook email, you must use the corresponding version of Perceptive Workgroup Search.

If you have a 64-bit version of Microsoft Office, it is best to install the 64-bit version of Perceptive Workgroup Search. Similarly, if you have the 32-bit version of Microsoft Office, then install the 32-bit version of Perceptive Workgroup Search.

Complete readiness checks

Before you begin the installation or upgrade process, complete the following readiness checks.

- Verify that you have a user name and password for the Customer Portal at http://www.lexmark.com so you can download installation files and access product documentation.

- Verify that that you are logged in as a member of the Administrators group on the local computer.

- On the Perceptive Workgroup Search computer, check the Windows Event Viewer to verify that the computer has no DNS, hardware, or critical Windows errors.

- Verify that your system meets the requirements in the *Perceptive Workgroup Search Technical Specifications*.

- Verify your product compatibility outside of Perceptive Workgroup Search, such as the compatibility between the service pack level of the operating system.

Download Perceptive Workgroup Search files

To download the necessary files to install Perceptive Workgroup Search, complete the following steps.

1. Go to the Lexmark website at www.lexmark.com and log in to the Customer Portal.

2. In the **Product Downloads** page, search for all downloadable items for the specific product and version you want to use. These files may include a product installer, product documentation, or set of supporting files.

3. Download the relevant files to a temporary directory on your computer.

Install Perceptive Workgroup Search

To install and license Perceptive Workgroup Search on the local computer, complete the following steps.

1. If your Windows operating system uses User Account Control (UAC), right-click the **EXE** file you downloaded and select **Run as Administrator**. Otherwise, double-click the **EXE** file.

2. On the Perceptive Workgroup Search 10 Setup page, click Next.

3. On the **Read the license agreement** page, review the terms in the License Agreement, scroll to the end of the agreement, and then click **Next**.

4. On the **Personalize Perceptive Workgroup Search 10** page, complete the following substeps:

   1. In the **Your name** box, specify the owner user.

   2. In the **Your company** box, type the name of the company for which the product is licensed.

   3. In the **Your License Key** box, type the license key supplied by your Perceptive Software representative or check the **Demo Mode** option to install without a license key.

   4. Click **Next**.

5. On the **Choose folder** page, browse to the destination folder where you want to install the files.

   Note You must store the program and data files on a local drive. We recommend that you store the files in the default location.

6. On the **What type of license do you want to use?** page, complete one of the following actions:

   - To install Perceptive Workgroup Search for multiple networked users, select **Multi-user install**, click **Next**, browse to the destination folder where the shared license files should reside, and then click **Next**.

     Note This method is the preferred installation. For the destination folder, you must select a network folder that is readable and writable by any user who accesses Perceptive Workgroup Search.

   - To install Perceptive Workgroup Search for only the computer running the installation, select **Standalone install** and click **Next**.

7. On the **Type a program group name** page, complete the following substeps:

   1. In the **Program group name** box, leave the default name of **Perceptive Workgroup Search 10** that will appear in the **Start** menu, or specify a different name.

   2. To create shortcuts, select one of the following options:

      - **Create shortcuts for all users of this computer**. Creates a shortcut to Perceptive Workgroup Search in each Windows user account that exists on the computer.

      - **Create shortcuts just for me**. Creates a shortcut to Perceptive Workgroup Search only in your Windows account.

   3. Click **Next**.

8. On the Perceptive Workgroup Search 10 Setup page, click Next.

9. When the **Perceptive Workgroup Search 10 has been successfully installed** message appears, select any of the following options:

   - **Run Perceptive Workgroup Search 10 now**. Launches Perceptive Workgroup Search immediately after you complete the installation.

   - **Display Perceptive Search Start Center.** Runs the Perceptive Search Start Center and displays an icon in the Windows System Tray. The Start Center must run to perform scheduled index updates.

   - **Activate this software now**. Opens the **Perceptive Search License Manager** where you can activate Perceptive Workgroup Search. If you previously typed a time-limited evaluation license key in the **Your License Key** box, you must activate Perceptive Workgroup Search within 14 days of installation. If you previously typed an Enterprise license key in the **Your License Key** box, you must activate Perceptive Workgroup Search now.

10. Click **Finish**.

Complete licensing tasks

License codes determine which Perceptive Search products you can use, whether the installation is a time-limited evaluation, and the level of user access. The following sections detail licensing information that you can or must complete during the installation process.

About activation requirements

If you entered a full license key in the installation wizard, you must activate the code within 14 days. A volume license key does not require activation.

License Manager will send you warning messages until the 14 days pass. If you do not activate the license key within this time, the software will stop functioning until you activate the code.

If you entered a time-limited evaluation license key during the installation and then purchase a full license key, you must also activate the full license key.

Activate a license key

To activate a full license key, complete the following steps.

1. In **Perceptive Search License Manager**, on the **Local License Keys** tab, select your licensed product listing and click the **Activate** button.

2. In the **Activation wizard**, follow the prompts to request and enter the activation code.

3. Close Perceptive Search License Manager.

About assigning licenses

Perceptive Workgroup Search provides the following two seat allocation options:

- **Self-seating**. License Manager allows users to seat themselves on a first-come first-served basis. Self-seating works best when the number of licenses is sufficient for all employees and the users are relatively controlled. Most network installations use self-seating for each workstation.

- **Pre-seating**. You manually assign a user a seat. This option works best when you need more control over the licenses (e.g. Citrix or Terminal Services)

You can use a combination of these allocation options. For example, you can manually assign seats to a handful of key users and then enable the self-seating option for the remainder of your users.

Important If you choose the pre-seating option for any users, you must complete the steps in the following Assign a seat or workstation to a user section before you create an installation package to distribute the software to users.

Assign a seat or workstation to a user

To assign a seat to a workstation or user, complete the following steps.

1. In **Perceptive Search License Manager**, on the **Network License Keys** tab, click the **Browse** button and navigate to the network folder designated as the Perceptive Workgroup Search License Server folder, select the folder and click **OK**.

2. On the **Users** tab, select each computer or user and click **Allocate**.

Prepare files for the installation package

To prepare files for the installation package that you will use to distribute Perceptive Workgroup Search to users, complete the following step.

- Navigate to the temporary directory where you stored the **Perceptive Workgroup Search 10.5 GPO Utility.zip** file and extract its files.

  Step result The utility folder now contains the **isys.adm** and **isysgpo.exe** files that were extracted from the **Perceptive Workgroup Search 10.5 GPO Utility.zip** file.

Create and distribute the installation package

You must enter Group Policy parameters in Command Prompt to create and distribute the installation package of the Perceptive Workgroup Search software. The following sections provide the steps and an example to complete this task. Installation Package Parameters lists the required and optional parameters.

Set the installation package parameters

To create the installation package and distribute it to users, complete the following steps.

1. In **Command Prompt**, navigate to the directory where you stored the **ISYSgpo.exe** file and enter the following required parameters for your installation:

    - For **INPUTSETUP.EXE**, specify the absolute path to the PerceptiveWorkgroupSearch-<*version*>-<*platform*>-installer.exe file.

    - For **DESTINATION.MSI**, specify the absolute path to the location where you want to generate the installation package.

    - For **LICENSECODE**, specify the license key provided for your Perceptive Workgroup Search installation.

    - For **USERCOMPANY**, specify the name of the company for which Perceptive Workgroup Search is licensed.

    - For **USERNAME**, specify the name of the owner user.

    - For **LICFOLDER**, specify the absolute path to the Perceptive Workgroup Search License folder that contains the license files.

2. Optional. Enter any of the following parameters that apply to your installation:

    - For **ALLUSERS**, specify one of the following options:

        - **TRUE** = Display Perceptive Workgroup Search in the Start menu for any user that logs into the computer.

        - **FALSE** = Only display Perceptive Workgroup Search in the Start Menu for the user for which the software was installed.

    - If the installation applies to multiple users or computers, for **INSTALL_TYPE_MULTI**, specify **TRUE**.

    - To change the default location for the installation files, for **TARGETDIR**, specify an absolute path. The default is [*drive*]:\Program Files\Perceptive Workgroup Search 10.

- To designate a location to store files that you will later copy to the installation folder, for **OTHERINSTALLFILES**, specify an absolute path.
- To change the default text that appears in the Start menu, for **STARTMENU**, specify the new text. The default is Perceptive Workgroup Search 10.

Example Parameters

The following example shows parameters to create and distribute an installation package for multiple users.

```
C:\Users\Administrator\Downloads>ISYSGPO.EXE "C:\Users\administrator\Downloads\Perceptive Workgroup
Search 32-bit 10.5.0 for Windows.exe" "C:\Users\user name\Downloads\PerceptiveWorkgropuSearch.msi"
INSTALL_TYPE_MULTI="TRUE" LICENSECODE="license key" USERCOMPANY="company name"
USERNAME="user name" LICFOLDER="\\SERVER01\PerceptiveWorkgroupLicenseShare"

Perceptive Search GPO Installation Creator
Copyright <c> 2015 Perceptive Software.

Input File: C:\Users\administrator\Downloads\Perceptive Workgroup Search 32-bit 10.5 for Windows.exe
Output File: C:\Users\user name\Downloads\PerceptiveWorkgroupSearch.msi
Parameters: /s INSTALL_TYPE_MULTI="TRUE" LICENSECODE="license key" USERCOMPANY="company name"
USERNAME="user name" LICFOLDER="\\SERVER01\PerceptiveWorkgroupLicenseShare"

Creating MSI – done
Updating MSI – done
```

Installation Package Parameters

The following parameters apply when you create and distribute the installation package of Perceptive Workgroup Search. You must enter these parameters in Command Prompt.

Required parameters

Name	Description
USERNAME	Specifies the name of the owner user.
USERCOMPANY	Specifies the name of the company for which Perceptive Workgroup Search is licensed.
LICENSECODE	Specifies the license key provided for your Perceptive Workgroup Search installation.
LICFOLDER	Specifies the absolute path for the Perceptive Workgroup Search License folder that contains the license files. **Note** When completing a multiple-user installation, you must specify a UNC path to the shared folder where the network license is stored.
INPUTSETUP.EXE	Specifies the absolute path to the PerceptiveWorkgroupSearch-<version>-<platform>-installer.exe file.
DESTINATION.MSI	Specifies the absolute path to store the generated the MSI file.

Optional parameters

Name	Description
ALLUSERS	Specifies when to display Perceptive Workgroup Search in the Start menu. TRUE = Display Perceptive Workgroup Search in the Start Menu for any user that logs into the computer. FALSE = Only display Perceptive Workgroup Search in the Start Menu for the user for which the software was installed.
INSTALL_TYPE_STANDALONE	Specifies whether to install Perceptive Workgroup Search on only one computer. TRUE = Complete a standalone installation. FALSE = Do not complete a standalone installation.
INSTALL_TYPE_MULTI	Specifies whether to install Perceptive Workgroup Search for multiple networked users. TRUE = Complete a multiple-user installation. FALSE = Do not complete a multiple-user installation.
TARGETDIR	Specifies the absolute path to store the installation files. The default is [drive]:\Program Files\Perceptive Workgroup Search 10.
OTHERINSTALLFILES	Specifies the absolute path to store files that you will later copy to the installation folder.
STARTMENU	Specifies the name that appears in the Start menu. The default is Perceptive Workgroup Search 10.

Group Policy Options

The following options apply for configuration of Group Policies with Perceptive Workgroup Search.

Main Options

Option Name	Description
Prevent indexing of Email	Prevent the indexing of email messages. If enabled, users will not be able to add email rules to their indexes. You can disable individual mail clients below.
Prevent indexing of Email Attachments	Prevent the indexing of attachments to email messages. Enabling this policy can improve indexing performance of email systems.
Prevent indexing of Outlook Email	Prevent the indexing of emails contained within Microsoft Outlook.
Prevent indexing of Outlook Express Email	Prevent the indexing of emails contained within Microsoft Outlook Express.

Prevent indexing of Vista WinMail Email	Prevent the indexing of emails contained within Microsoft Vista Mail.
Prevent indexing of Eudora/Thunderbird Email	Prevent the indexing of emails contained within Eudora or Thunderbird.
Prevent indexing of Public Folders	Prevent the indexing of emails contained within Public Folder.
Prevent indexing of POP/IMAP Email	Prevent the indexing of emails stored on a POP or IMAP server.
Prevent indexing of Lotus Notes Email	Prevent the indexing of emails contained within Lotus Notes.
Prevent indexing of Document Management Systems	Prevent the indexing of Document Management Systems. If enabled, users will not be able to add DMS rules to their indexes. You can disable individual DMS clients below. This policy is disabled by default.
Prevent indexing of SharePoint Servers	Prevent the indexing of SharePoint servers.
Prevent indexing of TRIM Context Servers	Prevent the indexing of TRIM Context servers.
Prevent indexing of EMC Documentum Servers	Prevent the indexing of EMC Documentum servers.
Prevent indexing of Lotus Notes	Prevent the indexing of Lotus Notes.
Prevent indexing of Web Sites	Prevent the indexing of Web Sites.
Prevent indexing of Act!	Prevent the indexing of ACT!.
Prevent indexing with Scripting Rules	Prevent the indexing with Scripting Rules.
Prevent indexing of FTP Servers	Prevent the indexing of FTP servers.
Prevent indexing of Internet History	Prevent the indexing of Internet History.
Prevent indexing of the File System	Prevent the indexing of any file system. You can also disable either Local or Network file systems individually. This policy is disabled by default.
Prevent indexing of the Local File System	Prevent the indexing of the local file system. This will prevent the user indexing the content stored on their computer. This policy is disabled by default.
Prevent indexing of Network File Systems	Prevent the indexing of network file systems. This will prevent the user indexing content stored on the network.
Prevent the creation of New Indexes	Prevent users from creating new indexes. This policy enables you to push out shared indexes without the user being able to build their own. This policy is disabled by default.
Prevent the creation of Personal Indexes	Prevent users from creating personal indexes.

Prevent the creation of Shared Indexes	Prevent users from creating shared indexes and adding them to the Shared catalog.
Prevent the change Personal Data Location	Prevent the users from changing the default location of their personal indexes.
Prevent Change Shared Data	Prevent the users from changing the default location of the shared indexes.
Prevent user from launch the Perceptive Search License Manager	Prevent the users being able to launch the Perceptive Search License Manager.
Prevent users from changed options	Prevent the users from changing the options of Perceptive Workgroup Search.
Prevent indexing when running on battery	Prevent Perceptive Workgroup Search from starting an indexing run when running on batteries.
Prevent user from changing index configuration	Prevent users from changing the configuration options of indexes.
Prevent user from Reindexing Indexes	Prevent users from reindexing indexes.
Prevent user from Updating Indexes	Prevent users from updating indexes.
Prevent user from Editing the Common Words List	Prevent users from modifying the common word list.
Prevent user from Editing the Synonyms	Prevent users from modifying the synonyms.
Auto Synonyms	Enable this policy to enable/disable the automatic use for synonyms when searching.
Auto Conflate	Enable this policy to enable/disable the automatic use for conflation when searching.
Enforce Security	Enable this policy to have Perceptive Workgroup Search filter the result list based on the users permissions.
Prevent user from Copying from the results	Prevent users from copying from the results list.
Prevent users from Annotating documents	Prevent users from annotating documents.
Prevent users from changing indexes	Prevent users from changing indexes.
Prevent users from editing catalog	Prevent users from editing the catalog.
Prevent users from printing document	Prevent users from printing documents.
Prevents user from printing more than the specified	Prevent users from printing more than the specified number of documents.
Swap Path	Indicates the swap folder used during indexing

Index Batch Limit	Indicates the maximum number of documents that should be applied to the index per batch. Adjusting this number may slow down indexing speed.
Index Chain Limit	Indicates the maximum number of indexes a user can search at once, increasing this number may increase search speed.
Synonym File	Specifies the location of the synonym. Change this value to specify a synonym file shared by all users.
Concept File	Specifies the location of the concept tree. Change this value to specify a concept tree file shared by all users.
Shared Catalog Path	Specifies the location where the Perceptive Workgroup Search shared catalog is stored.
Shared Index Path	Specifies the default location where shared indexes will be created.

Auditing Options

Option Name	Description
Enable Auditing	Enable this policy to enable/disable the auditing features of Workgroup.
Audit UID	Contains the pattern used to identify users in the audit log, use {UID} to indicate the user's login name.
Audit File	Indicates the name of the audit log file. Specify a shared network location if you wish to see all users in a single log file.
Audit Errors	Indicates if errors are to be audited.
Audit Queries	Indicates if queries are to be audited.
Audit Results	Indicates if results are to be audited.
Audit Browses	Indicates if browse views are to be audited.
Audit Activates	Indicates if document activates are to be audited.
Audit Annotates	Indicates if document annotations are to be audited.
Audit Loads	Indicates if document launches are to be audited.
Audit Databases	Indicates if databases are to be audited.

Filtering Options

Note Filtering options set via policy always apply to users' queries. Users will be unable to remove any filters that are enabled. If a path filter is required for all users, performance may be enhanced by excluding documents from the index, rather than filtering for each query.

Option Name	Description
Filter Path Contains	Only display results that contain a specified character string anywhere in their full path and filename.
Filter Path Omits	Do not display results that contain the specified character string anywhere in their full path and filename.
Filter Name Like	Only display results that contain a specified character string in their file name (not including the full file path).
Filter Name Unlike	Do not display results containing a specified character string in their file name.
Filter Dated Before	Only display results where the modified date falls on or before the date specified. Dates must be provided in standard format for your locale.
Filter Dated After	Only display results where the modified date falls on or after the date specified. Dates must be provided in standard format for your locale.
Filter Category Like	Only display results which contain a specified character string anywhere in their category.
Filter Category Unlike	Do not display results which contain the specified character string anywhere in their category.
Filter Indexed Before	Only display results where the date indexed falls on or before the date specified. Dates must be provided in standard format for your locale.
Filter Indexed After	Only display results where the date indexed falls on or after the date specified. Dates must be provided in standard format for your locale.
Filter Indexed Created Before	Only display results where the created date falls on or before the date specified. Dates must be provided in standard format for your locale.
Filter Indexed Created After	Only display results where the created date falls on or after the date specified. Dates must be provided in standard format for your locale.

Upgrade Perceptive Workgroup Search

To upgrade from a previous version of Perceptive Workgroup Search and preserve your indexes and settings, complete the steps in the following sections.

Important Before you begin to upgrade a network installation of Perceptive Workgroup Search, verify that no users are accessing the software.

Backup essential files

To ensure that you can replace essential data in case of any problems, we recommend that you back up the following files before you begin the upgrade process. These files vary by implementation, and your implementation might not include all of them. The default directory for these files is [*drive*:]\Program Files\Perceptive Workgroup Search <version>.

Required files

Name	Description
ISYS.DB	The Perceptive Workgroup Search 6/7 catalog file
ISYSCAT.XML	The Perceptive Workgroup Search 8/9/10 catalog file
ISYS.CWD	The Perceptive Enterprise Search Common Words file
ISYS<*version*>.LIC	.KEY	The Perceptive Workgroup Search license files

Optional files

Name	Description
ISYS.SYN	The Perceptive Enterprise Search Synonym Rings file
ISYS.SCT	The Perceptive Enterprise Search Concept Tree file

To backup your essential files, complete the following steps.

1. In your current Perceptive Workgroup Search directory, copy the essential files.
2. Place the copied files in a temporary location.

Uninstall the existing version

To uninstall the existing version of Perceptive Workgroup Search, complete the following steps.

1. Close all open programs.
2. Ensure all instances of Perceptive Workgroup Search software are closed.
3. Click Start > Settings > Control Panel > Add/Remove Programs.
4. Select Perceptive Workgroup Search.

5. Click Remove or Uninstall.

6. If you are asked whether to remove all Perceptive Workgroup Search data, click **No**.

7. Click **OK**.

8. Restart your computer.

Install the new version

*   To install the new version of Perceptive Workgroup Search, complete the steps specified earlier in this document.

Important If you do not receive a message during the installation that refers to an update, stop the installation and verify that you logged in using the administrator user account that was used when Perceptive Workgroup Search was originally installed.

Restore essential files

To restore the original files from the backups you created earlier, complete the following steps.

1. Close Perceptive Workgroup Search.

2. In the temporary location where you stored the files, copy the files.

3. Place the copied files in the Perceptive Workgroup Search directory.