



T O V E K

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# Tovek Tools: Fulltext Plug-in for Analyst's Notebook

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version 4.26 and above

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**User Guide**

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## Overview

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Tovek Tools Fulltext Plug-in for Analyst's Notebook extends functionality of the Analyst's Notebook application by allowing to create links between chart items based on information contained in text documents. Documents have to be first indexed by Tovek Tools so they can be searched rapidly.

## Manual Version

This manual corresponds to the Tovek Tools version stated on the first side of the manual. For further program versions Release Notes will be published, which will be available on [www.tovek.com](http://www.tovek.com).

## Publications Related to Tovek Tools

Tovek Tools Search Pack

Tovek Tools Analyst Pack

Tovek Tools: Query Editor

Tovek Tools: InfoRating

Tovek Tools: Harvester

Tovek Tools: Fulltext Plug-in for Analyst's Notebook

Verity Query Language

## Help

Tovek Tools contains help accessible from **Help** menu. After selecting the **Help Content F1** command you can see the overview help for all Tovek Tools programs and after selecting **About** command you will see information about the licence owner, expiration and Tovek Tools version. The version number is required for a support demand.

## Terms Used

The following terms are used in this text:

Entity	Any element of the chart that can be associated with a fulltext query.
Entity (Query)	A chart entity containing a query card.
Query	All what is needed to search for documents. It is: <ul style="list-style-type: none"><li>▶ Query text and type</li><li>▶ List of selected sources</li><li>▶ Minimal document score</li><li>▶ Maximum number of returned documents</li></ul>
Document	A chart item representing a document.

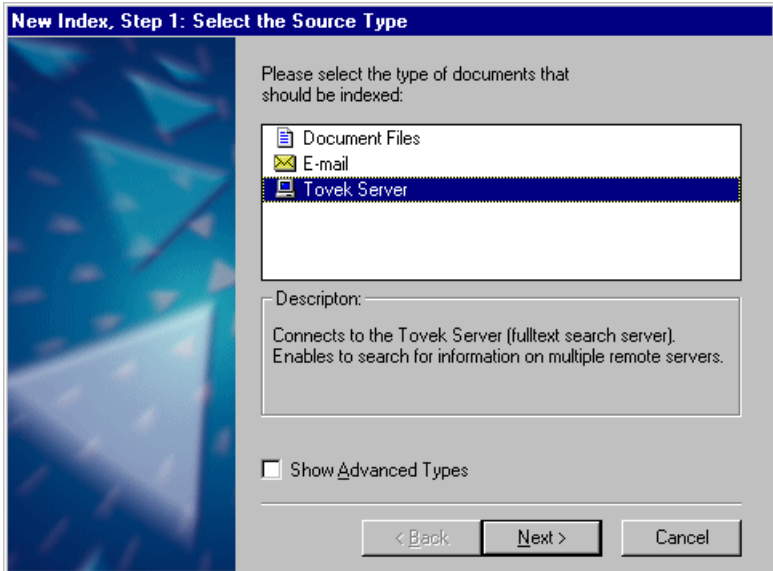
## Set up Demo Data

Examples in this chapter are based on one month of Reuters news about the European Union. You can actually work with the same data, both to familiarize yourself with the product and to check that everything works as expected.

First you need to have Analyst's Notebook installed. Then install the Tovek Tools Analyst Pack. The last step is to connect the Reuters demo database. You can access it from the Tovek Server on the internet (in client/server mode) or you can download the data and work with them locally. Screenshots later in this chapter will show working with the local copy of the demo database.

## Connecting to Tovek Server

Start Index Manager, choose **Source/New**, and select Tovek Server as a new source type:



In the next step, enter the following values:

**New Source, Step 2: Server Information**

Please specify the address and name of Tovek Server.  
For more information contact your system administrator.

Server Address:  
ts.tovek.com:6122  
(http://server\_address:6070/TovekSearch for ts5x defaults)

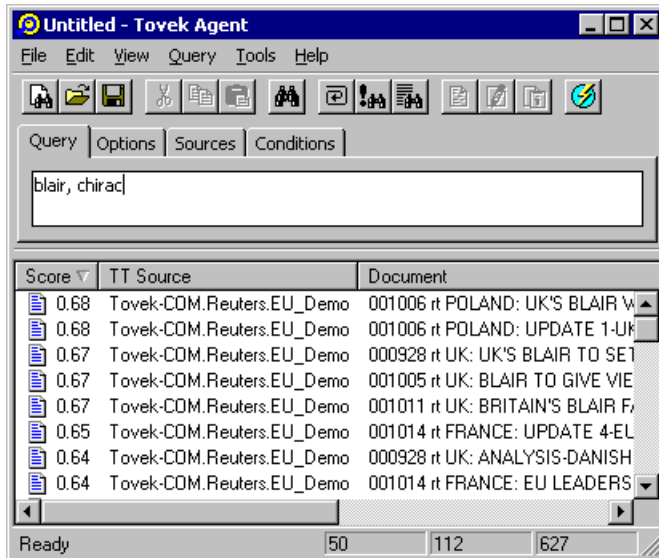
Server Name (optional):

Login...

< Back    Next >    Cancel

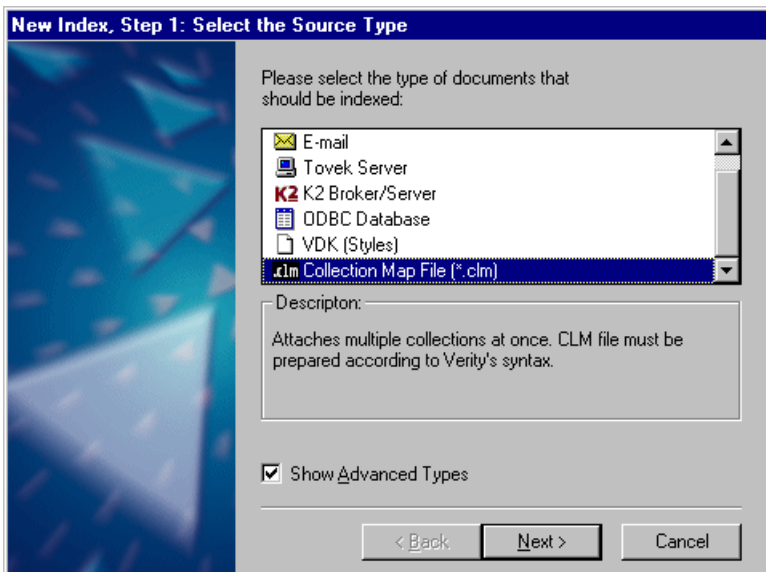
Server address string is **ts.tovek.com:6122**. You do not need any user name or password to access this server.

When you click **Next**, Reuters demo source will be available for searching. Test it in Tovek Agent:

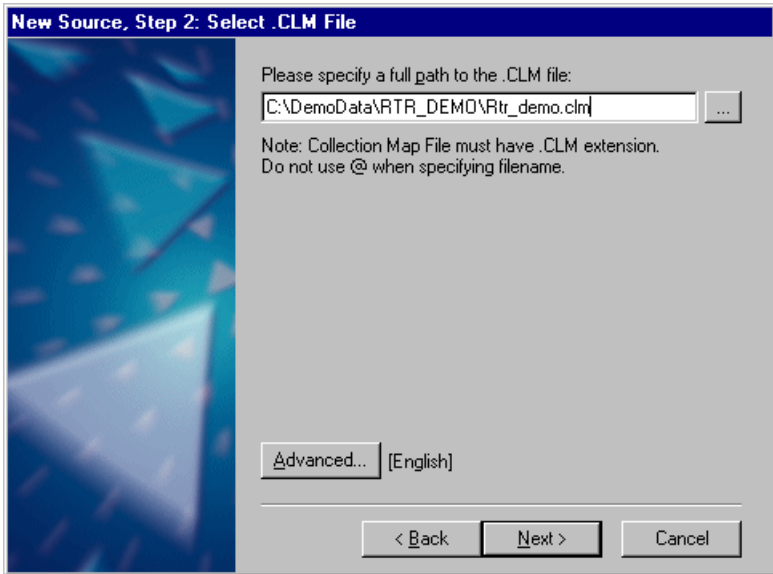


## Using Local Copy

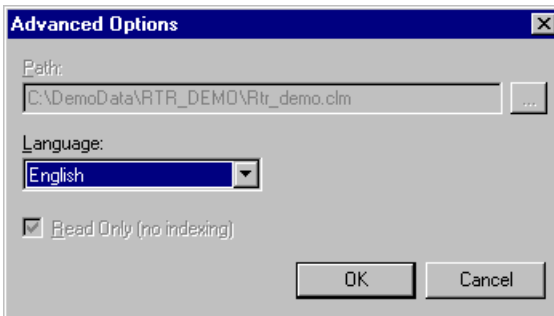
Download and unpack the archive containing the demo data. Start Index Manager, choose **Source/New**, make sure that **Show Advanced Types** checkbox is checked, and select Collection Map File (\*.clm) as a new source type:



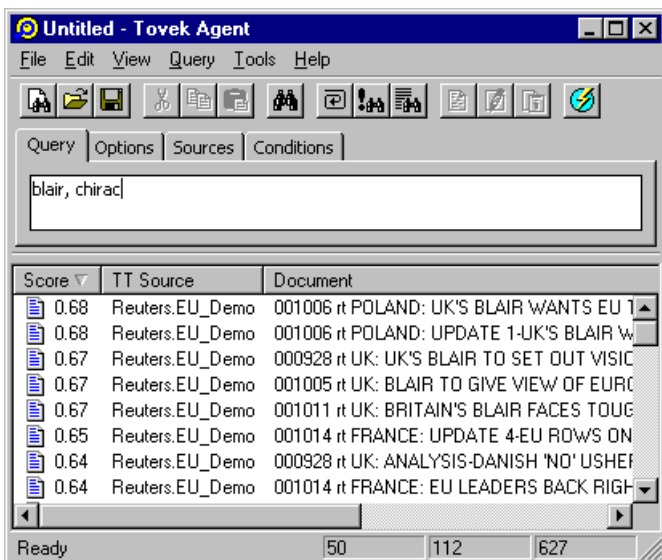
In the next step, enter full path to the **rtr\_demo.clm** file from the unpacked archive. You can use browse button to locate the file.



Before you continue, use **Advanced** button to make sure that the language used for this source is English:



Clicking the **Next** button will attach the new source. Test it in Tovek Agent:



As the last step, check that the **Data** menu of the Analyst's Notebook has one new group of commands, **TT Fulltext**.

## Example

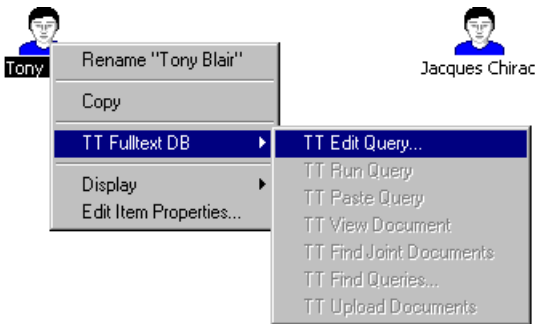
---

Launch Analyst's Notebook, open a new chart and connect it to the fulltext plug-in by choosing the **Data/TT Fulltext/Open** command.

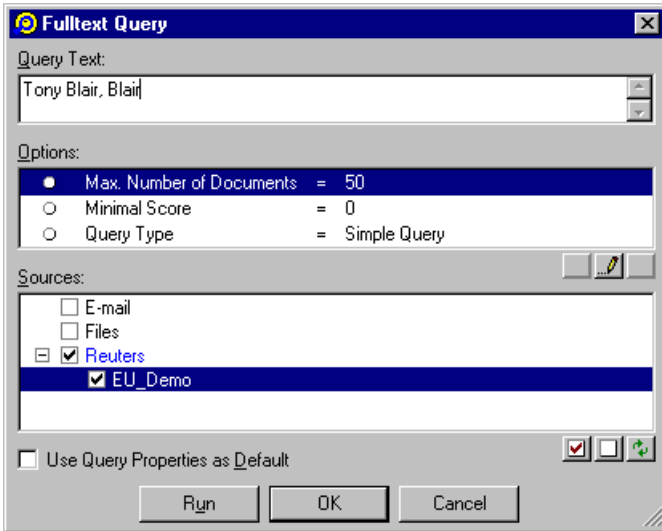
Insert two persons into the chart and rename them.



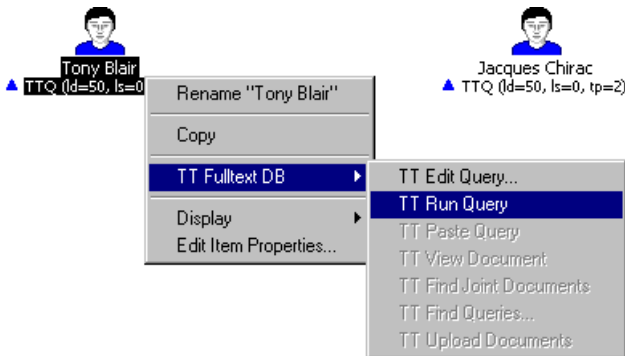
For both persons, add a fulltext query by selecting **TT Edit Query** command from the item's context menu.



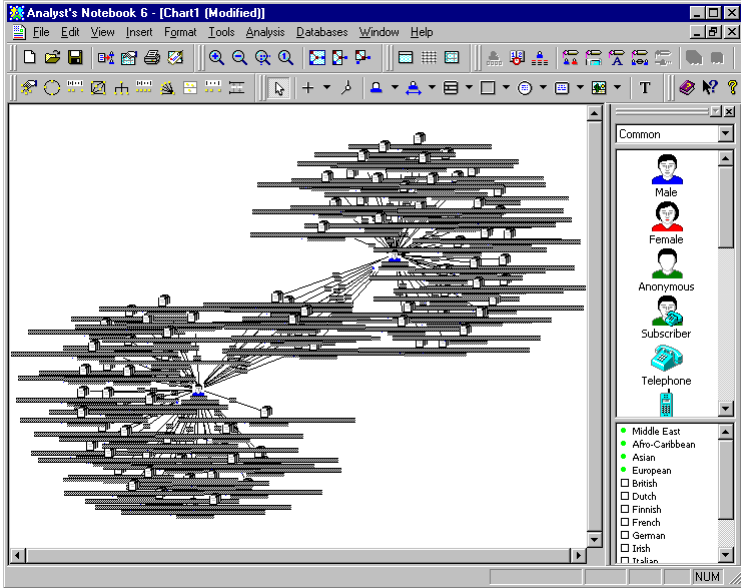
Select only the demo source and click **OK**. Do the same for the second person.



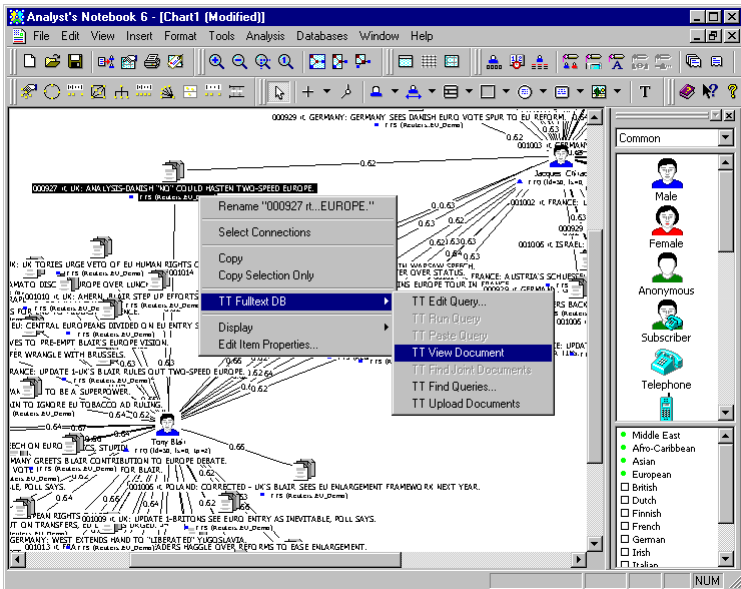
For both icons run **TT Run Query** command from their context menus.



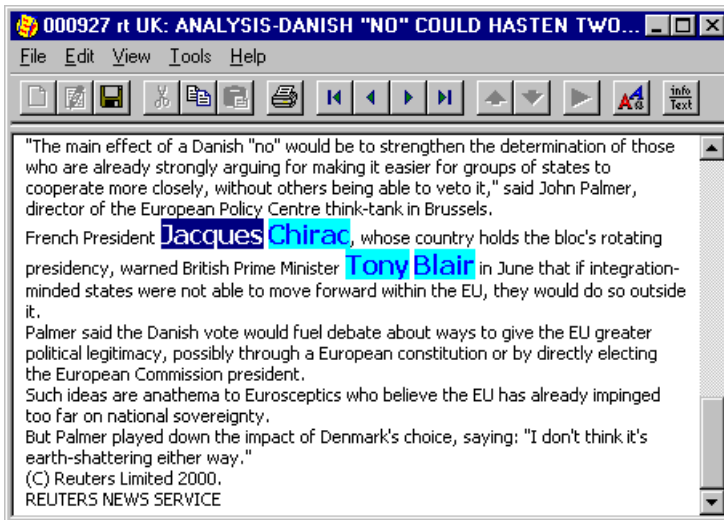
Retrieved documents will be inserted into the chart and arranged using the Peacock Layout; this automatic layout feature can be later turned off.



Select one of the documents linking both persons together and from its context menu choose the **TT View Document** command.



Document text with highlighted words from both queries will be shown:



This way you have found that these persons might have something in common and that the link is this document.

## Connecting to a Chart

The fulltext plug-in has to be first connected to every chart where fulltext searching is required. It is done by the **Data/TT Fulltext/Open** command. When a chart is saved and opened later, the fulltext plug-in has to be connected again.

After the plug-in is connected to a chart for the first time, two new entity types and a new link type are created,



Tovek database document



Tovek Query

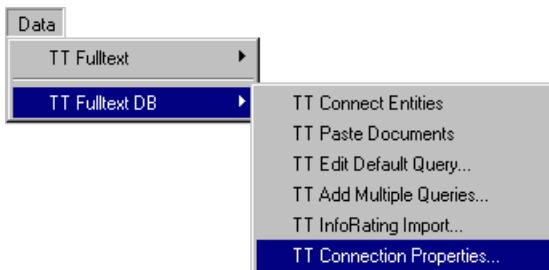
Tovek database link 

as well as three new attribute classes:

- ▲ TT Query
- TT Source
- TT Document text

A new group of commands in the **Data/TT Fulltext DB** menu is added to the Analyst's Notebook main menu:

Commands from the **Data/TT Fulltext DB** menu are also added to the context menu which pops up upon a right-click anywhere in the free chart area.



# Settings

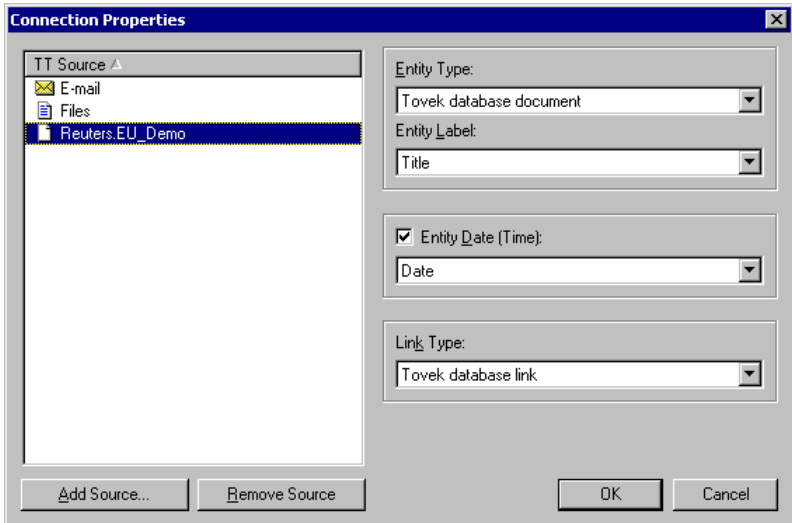
Fulltext plug-in settings are divided into two groups. The first group contains settings saved with the chart, called **Connection Properties**. The second group includes global settings saved in the configuration files and is called **Configuration**.

## Connection Properties

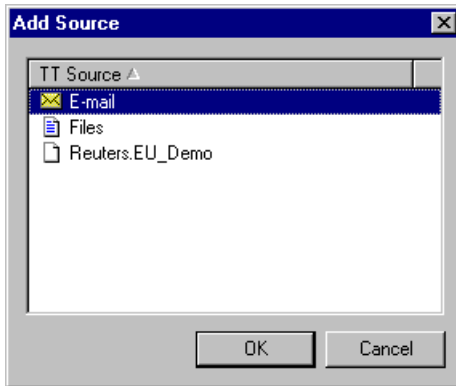
Connection properties include a query template, containing all the query data without the query text, and optional settings for every Tovek Tools source.

The query template is used when creating new query objects. Parameters of the query template can be modified either by the command **Data/TT Fulltext DB/TT Edit Default Query** or by checking the **Use Query Properties as Default** when editing a query.

Documents inserted from different sources can be of a different entity type (and so have different icons), can have a distinct link type associated with them, and their labels can be taken from different source fields. These settings can be changed by the **Data/TT Fulltext DB/TT Connection Properties** command:



To add a new entry into the list of sources click the **Add Source** button. A dialog window appears where you can select source names to be added.



In the left part of the window select the source to be modified and in the right part change the actual settings for this source. To remove settings for a source select it in the list and choose **Remove Source**.

All of these properties are optional. If not specified, the following defaults will be used: Tovek Database Document as an entity type, Tovek Database Link as a link type, and the Document (VdkVgwKey) field for entity labels. If a value of specified document field is empty, default field setting will be also used for that document.

Connection properties can be saved with the chart template for new charts.

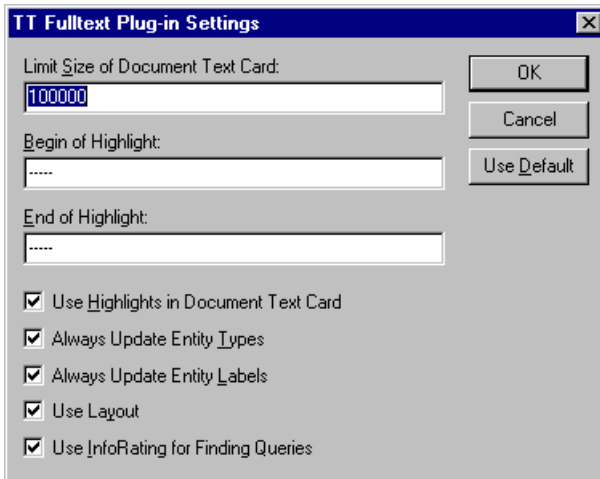
## Configuration

The configuration data includes the following:

- ▶ Maximum length of text saved in an entity card
- ▶ Whether to mark hilited words when the document text is uploaded, and the start and end marks for these words
- ▶ Whether to update entity types every time a query is run
- ▶ Whether to update entity labels every time a query is run

- ▶ If a default layout should be applied after the documents were inserted
- ▶ Whether to use the InfoRating for finding queries

These options can be set by selecting the **Data/TT Fulltext/Settings** command:



How to upload document text into a card is explained in later chapter. The length of a document text spans from 1000 to 500 000 characters. By limiting the text length you can substantially affect the size of the chart file. You can also choose whether to mark the words that were hilted by the query, and if so, the start and end marks to be used for the operation.

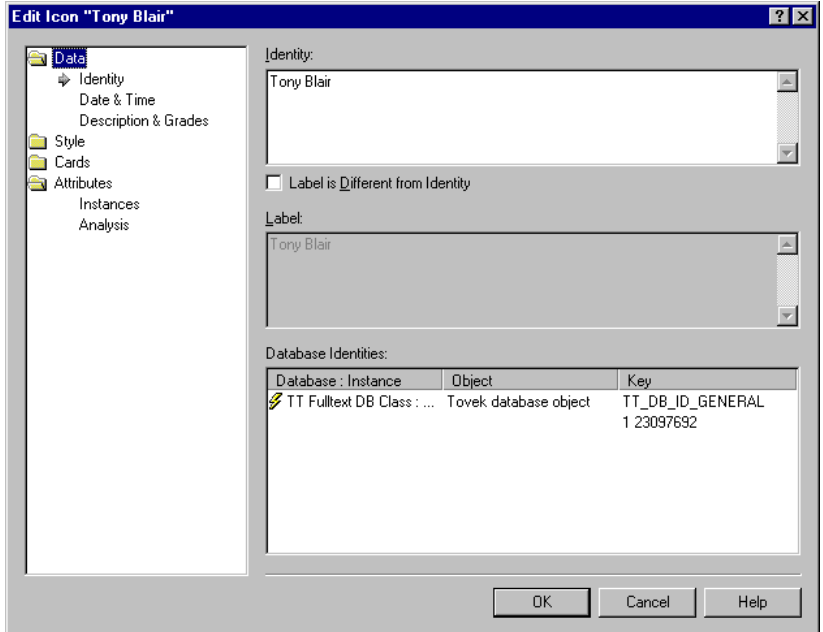
If you do not require to update entity types and labels of documents already inserted into the chart, clear the **Always Update Entity Types** checkbox and **Always Update Entity Labels** checkbox, respectively.

**Use Layout** option controls whether the Peacock Layout is applied every time new documents are inserted into a chart. If **Use InfoRating for Finding Queries** is turned on, it will considerably speed up the process of matching queries against documents, but for this feature to work you will need to have also the InfoRating licence (which is normally a part of Tovek Tools Analyst Pack).

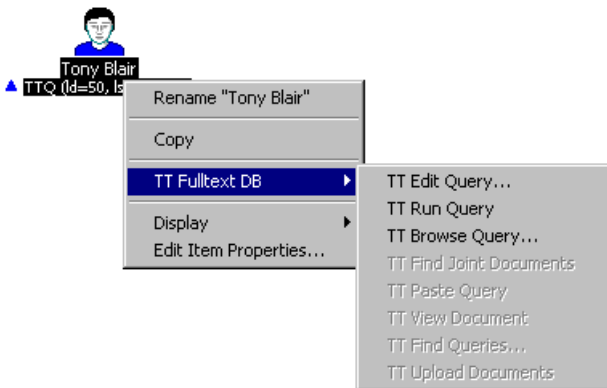
The **Use Default** button resets the configuration settings into defaults.

## Chart Items

Each newly inserted entity is automatically assigned a fulltext plug-in database key. The exception are labels, which cannot be connected to the fulltext plug-in, and OLE objects in the Link Notebook version 5.x.



Extended context menu which pops up upon a right-click on a selected entity has the following commands:



This is a brief description of commands which are then explained later:

- |                                |  |
|--------------------------------|--|
| <b>TT Edit Query</b>           | Adds a new query or edits an existing query.   |
| <b>TT Run Query</b>            | Runs a query and then inserts documents into a chart.  |
| <b>TT Browse Query</b>         | Runs query and shows the result list in a separate window, allowing you to choose which documents to insert into a chart and to see which of the other queries in the chart are related to a given document. |
| <b>TT Find Joint Documents</b> | Finds documents relevant to two or more queries.   |
| <b>TT Paste Query</b>          | Imports queries and documents from Tovek Agent application.  |
| <b>TT View Document</b>        | Shows the document text in Tovek Viewer including highlighted words of all queries linked to the document.   |
| <b>TT Find Queries</b>         | Finds relevant document queries.   |
| <b>TT Upload Document</b>      | Uploads document text into an item card.   |

Fulltext plug-in cannot work with objects containing no database key so no commands are available for such objects. Database key can be

added to entities created before connecting the fulltext plug-in by selecting an entity and choosing **Data/TT Fulltext DB/TT Connect Entities** command. In the Link Notebook version 5.x you have to add a database key manually to the inserted OLE objects because no database key is automatically assigned to them. Fulltext plug-in cannot be connected to the Label objects.

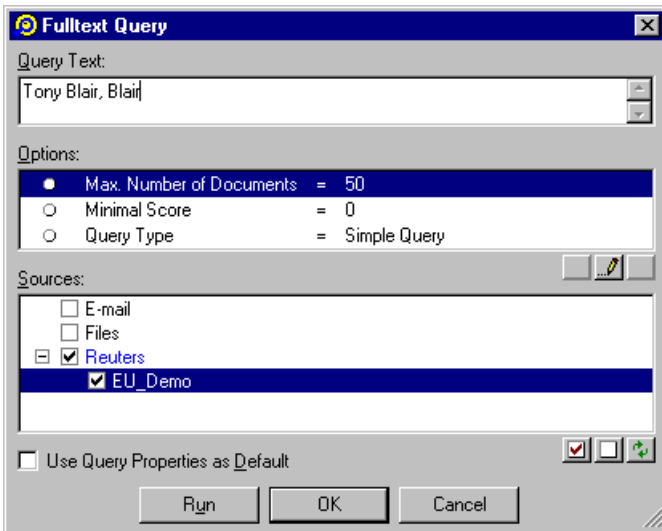
## Queries

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Fulltext queries are used to discover possible links between chart entities by searching through documents using Tovek Tools.

### Create a New Query

When you right-click a chart entity and select the **TT Edit Query** command, you can specify all query parameters:



### Copy Query from Tovek Agent

Run a query in Tovek Agent and select documents to be inserted into the chart. Then choose the **Tools/Copy for Analyst's Notebook** command. Next, switch to the **Analyst's Notebook**, open the context menu of the entity to which the query and documents should be added and select the **TT Paste Query** command. The advantage of this method is that documents selected by Tovek Agent are imported directly into the chart, without the need to run the query again.

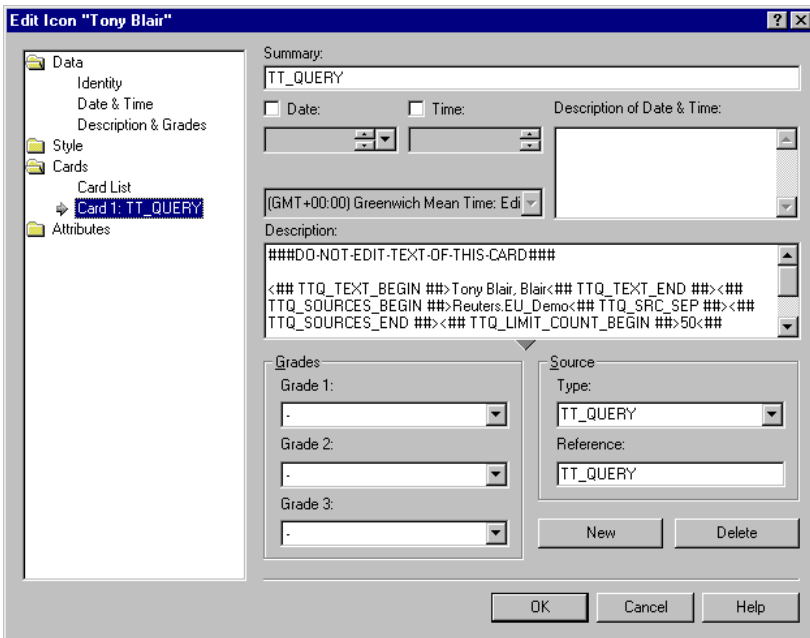
## Insert Multiple Queries

Using the command **TT Add Multiple Queries** chosen either from the **Data/TT Fulltext DB** menu or from the chart context menu (when no object is selected) you can insert multiple queries in a single step. This approach is similar to the InfoRating, however here you can also specify the object type for a particular query.

You can also modify the query by **TT Edit Query** command. The query parameters are identical to those in Tovek Agent. For more details about queries please refer to Tovek Agent section.

<b>Query Text</b>	A fulltext query that specifies which documents should be retrieved.
<b>Max. Number of Documents</b>	The maximum number of documents from one source database which can be retrieved and imported into a chart. Examples of two different databases are your local data sources and remote sources managed by Tovek Server. Maximum value is 500 documents per database.
<b>Minimal Score</b>	The minimum relevance of a document. Documents with lower score will not be inserted.
<b>Query Type</b>	Simple Query or a Free Text query.
<b>Sources</b>	List of sources to be searched. Select All button marks all sources, Select None clears the selection. Every query must have at least one source selected.
<b>Use Query Properties as Default</b>	If selected, query template of the current chart will be modified according to the actual parameters of this query. Query text is not stored in the template.

Each chart entity can contain only one query stored in the TT\_QUERY card. If you wish to remove the query from an entity, simply delete the card.



Every entity containing a fulltext query has a TT Query (TTQ) attribute. The value of TTQ attribute consists of these three parts:



- Id** Max. number of retrieved documents. 0 means no limit.
- Is** Document score limit. 0 means no limit.
- tp** Query type: 1 - free text, 2 - simple query.

The value is updated after every query modification. Entities with required properties can be found by searching for values of their attributes.

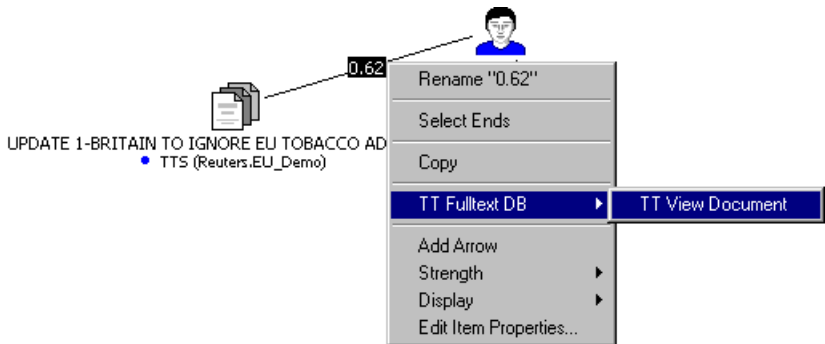
## Documents

This chapter describes how to insert documents into a chart, view their contents, search for matching queries for selected documents, and also how to automatically store document texts into cards.

### Inserting Documents into a Chart

New documents are always inserted into a chart as individual items called icons. Icon types and labels are set in the connection properties for a given source. Unique document identification is provided by the combination of source name and document key (the internal VdkVgwKey field). It is also used in subsequent actions with the document, for example when displaying the document text in Tovek Viewer.

Every document is connected to the entity (query) by a link labeled by the document's relevance to the query. Link also contains the document's database key and its context menu has the additional **TT View Document** command. The link contains the same query as was used to retrieve the document. The query is stored in its own query card (TT\_QUERY) for displaying the document text with its highlighted words.



Each document includes a TT Source (TTS) attribute whose value is the document's source name. By using this attribute you can search for documents coming from a particular source.

You can insert documents by the following ways:

## Run the Query

Choose the **TT Run Query** command from the context menu of an entity containing the fulltext query. Query can also be run directly from the query editing window by choosing the **Run** button.

## Run Query and Browse the Results

Choose the **TT Browse Query** command from the context menu of an entity containing the fulltext query. This way the query will be run and the result list shown in a query browser window. There you can see which documents are already in the chart and which are not, you can view the documents, mark them for export (these two actions are the same as in the Tovek Agent), and finally you can also check whether a document can be linked to other queries contained in the chart, using the **Find Other Queries** button.

## Copy Selected Documents from Tovek Agent

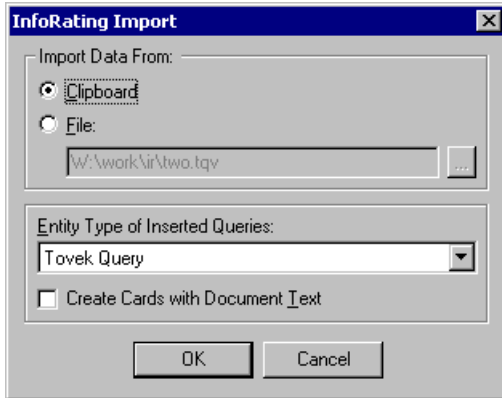
Selected documents from the result list are part of Tovek Agent query - see the **TT Paste Query** command. Should you wish to insert only selected documents into a chart without copying the query into any object, select the **Data/TT Fulltext DB/TT Paste Documents** command. This way documents will be inserted into the chart with no links to any entity (query).

## Insert Documents Relevant to Multiple Queries

Using the **TT Find Joint Documents** command you can insert documents that are relevant to two or more selected queries.

## Import InfoRating Context Matrix

Finally you can Import the InfoRating context matrix into a link chart by selecting the **Data/TT Fulltext DB/TT InfoRating Import** command:



Options are following:

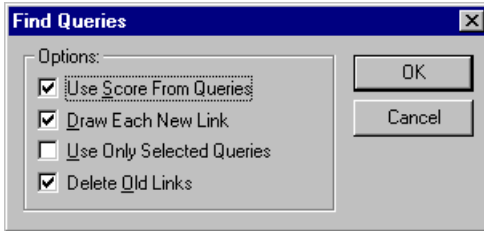
- Import Data From: Clipboard** Data are imported via the clipboard, into which they have been copied in the InfoRating application using the Edit/Copy command.
- Import Data From: File** Filename of the InfoRating file. Previously selected file name is used for the next time.
- Type of Query Entities** Allows you to select the entity type for queries in the chart. A unique identifier of every entity is generated by the Analyst's Notebook.
- Create Cards with Document Text** The data file also contains document texts so you can import them as well. Select this option to create cards with uploaded document texts.

## Displaying Document Texts

To display a document text in the Tovek Viewer, select the **TT View Document** command from the document entity context menu. To display the document text including highlighted words retrieved by a particular query, select the **TT View Document** command from the menu of the relevant link, thereby identifying which query will be used for highlighting.

## Finding Queries Relevant to Documents

Within a chart you can find queries relevant to a document. First you have to select all documents you wish to find queries for. Then choose from the context menu of one of the selected documents the **TT Find Queries** command. A dialog box with query search options will be shown:



Options are as follows:

- |                                  |   |
|----------------------------------|---|
| <b>Use Score From Queries</b>    | If checked, minimum relevance is taken into account during the query search.  |
| <b>Draw Each New Link</b>        | If checked, new links between relevant documents and queries are drawn immediately after they are identified. If not checked, all links are drawn at the end of the search for every query.                                 |
| <b>Use Only Selected Queries</b> | For faster search you may select queries together with the documents. Enabling this option narrows the search only to selected queries. Caution: Combining this option with the <b>Delete Old Links</b> is not recommended. |
| <b>Delete Old Links</b>          | If checked, all existing links between selected documents and entities (queries) will be deleted before the search is started. This option affects only links created by the fultext plug-in.                               |

If the InfoRating is used to match queries against documents the document texts will be downloaded first and results of this operation will be show to the user.

To search for queries using the default settings you can skip the options window by holding down the **Shift** key when choosing **TT Find Queries** command. Default settings are:

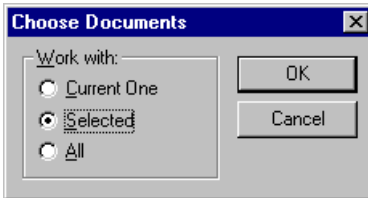
- ▶ Use score from queries: Yes
- ▶ Draw each new link: Yes
- ▶ Use only selected queries: No
- ▶ Delete old links: Yes

## Uploading Text of Documents into Cards

You might need to share your charts with other people. It is essential that everybody uses the same Tovek Tools sources with the same settings and names because part of the identification of every document is the source name. It is also required that everyone has the fulltext plug-in installed.

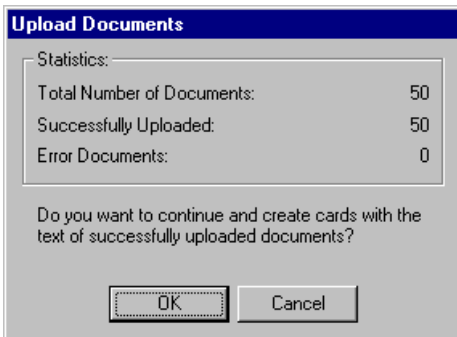
For distribution of charts to persons that either have no access to your data or do not have the fulltext plug-in installed you can upload document texts into cards. However, this option should be used with care because the file size of the chart file might become significantly bigger.

Document text is uploaded to a card by the **TT Upload Document** command from the document item context menu. You can specify into which items the document texts should be uploaded: to the current document, to the selected documents, or to all the documents in a chart.



Should you wish to create a card with the text for the current document only, you can skip the options by holding down the **Shift** key when selecting **TT Upload Document** command.

Initially, document texts are stored in memory. In the next step a report window appears, displaying a number of documents processed and a number of errors:



After selecting **OK**, the text cards will be added to documents.

If a document contains a text card, it also has a TT Document text (TTD) attribute.



ANALYSIS-DANISH "NO" COULD HASTEN TWO-SPEED EUROPE.

- TTD (sz=5179, full)
- TTS (Reuters.EU\_Demo)

Its value consists of two parts:

**sz** Length of the entire document text, in characters.

**full/truncated** Indicates whether the document text has been stored completely or not.

This attribute enables you to find all documents with truncated text and possibly adjust the maximum text length by the **Data/TT Fulltext/Settings** command.

## Appendix - Index of Commands

---

### Open

Location:	Analyst's Notebook main menu: Data/TT Fulltext/Open
Available:	Always
Description:	Connects the fulltext plug-in to the current chart

### Settings

Location	Analyst's Notebook main menu: Data/TT Fulltext/Settings
Available:	Always
Description	Defines configuration settings

### TT Connect Entities

Location	Analyst's Notebook main menu: Data/TT Fulltext DB/TT Connect Entities; or a chart context menu
Available:	After connecting the plug-in to a chart and with at least one entity selected
Description	Adds the fulltext plug-in database key to entities not connected automatically

### TT Paste Documents

Location:	Analyst's Notebook main menu: Data/TT Fulltext DB/TT Insert Documents; or a chart context menu
Available:	After connecting the plug-in to a chart and when a query with selected documents was copied from Tovek Agent for the Analyst's Notebook
Description:	Inserts selected documents from Tovek Agent search results into a chart

## **TT Edit Default Query**

- Location: Analyst's Notebook main menu:  
Data/TT Fulltext DB/TT Edit Default Query;  
or a chart context menu
- Available: After connecting the plug-in to a chart
- Description: Use to edit the default query settings for new queries

## **TT Add Multiple Queries**

- Location: Analyst's Notebook main menu:  
Data/TT Fulltext DB/TT Add Multiple Queries;  
or a chart context menu
- Available: After connecting the plug-in to a chart
- Description: Inserts multiple queries into a chart in one step

## **TT InfoRating Import**

- Location: Analyst's Notebook main menu:  
Data/TT Fulltext DB/TT InfoRating Import;  
or a chart context menu
- Available: After connecting the plug-in to a chart
- Description: Imports the InfoRating context matrix file into a chart

## **TT Connection Properties**

- Location: Analyst's Notebook main menu:  
Data/TT Fulltext DB/TT Connection Properties;  
or a chart context menu
- Available: After connecting the plug-in to a chart
- Description: Sets properties of the fulltext plug-in connection to a chart

## **TT Edit Query**

- Location: Context menu of a chart entity
- Available: After connecting the plug-in to a chart
- Description: Creates a new query or edits an existing query

## TT Run Query

- Location: Context menu of a chart entity
- Available: After connecting the plug-in to a chart. Selected entity must have a query card
- Description: Finds documents relevant to the fulltext query and inserts them into a chart

## TT Browse Query

- Location: Context menu of a chart entity
- Available: After connecting the plug-in to a chart. Selected entity must have a query card
- Description: Shows documents relevant to the fulltext query in a result list, allowing the user to choose which ones to insert

## TT Paste Query

- Location: Context menu of a chart entity
- Available: After connecting the plug-in to a chart. The entity must have a database key and a query with selected documents must be copied from Tovek Agent for Analyst's Notebook
- Description: Inserts a Tovek Agent query into the selected entity and adds selected documents from the result list to the chart, linking them with the selected entity (query)

## TT View Document

- Location: Context menu of a chart entity or context menu of a link between a document and an entity (query)
- Available: After connecting the plug-in to a chart. The entity or link must have a database key with identification of the document it represents in a chart
- Description: Displays the document text in Tovek Viewer including highlighted search words of all queries linked to the document

## **TT Find Joint Documents**

- Location: Context menu of an entity (query)
- Available: After connecting the plug-in to a chart and with at least two entities (queries) selected
- Description: Finds relevant documents for the selected queries

## **TT Find Queries**

- Location: Context menu of a chart entity
- Available: After connecting the plug-in to a chart. The entity must have a database key with identification of the document it represents in a chart
- Description: Finds relevant queries for selected documents

## **TT Upload Document**

- Location: Context menu of a chart entity
- Available: After connecting the plug-in to a chart. The entity must have a database key with identification of the document it represents in a chart
- Description: Creates cards with the texts of selected documents

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