



T O V E K

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# Tovek Server Client

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version 4.26 and above

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## Quick Start Guide

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# Introduction

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This guide aims to introduce you to basic operations of Tovek Agent and Index Manager for Tovek Server Client set.

The full description can be found in the Tovek Server Client manual.

## Indexing Documents – Index Manager

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Tovek Tools Index Manager in the Tovek Server Client set is used for connecting to Tovek Server or K2 Broker/Server fulltext sources. Tovek Agent will then search through these sources and retrieve matching documents.

### Connecting to Remote Collection



To connect Tovek Server or K2 Broker/Server, select the **Source/New** command, click the **New Index** toolbar button, or press the **Ctrl+N** shortcut key to display the New Index Wizard.

As a first step, select the source type Tovek Server or K2 Broker/Server (available if Show Advanced types checked).

In the second step fill in the server information. The server address can contain a port number after the semicolon. The server name is optional. The standard Tovek Server 5 address is `http://adresa_serveru:6070/TovekSearch`.

After pressing the **Login** button you can enter authentication type, user name, file containing user's certificate and file containing user's private key.

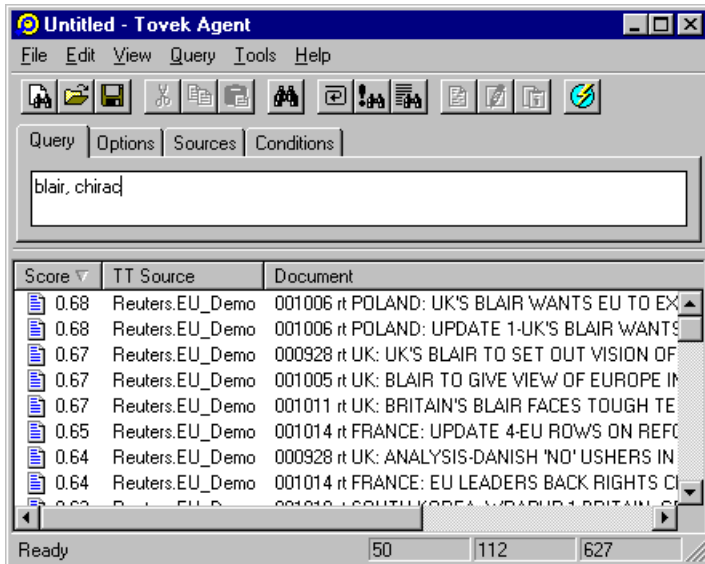
To connect K2 Broker or K2 Server you need to know the machine address and the port of the server. It is then entered in the form of address:port, for example: `veritydemo.verity.com:8800`.

These values should be obtained from Tovek Server, or K2 Broker/Server administrator. After pressing the **Next** button remote sources will be connected.

## Searching Documents - Tovek Agent

When any Tovek Tools application is started for the first time, the Tovek Tools Monitor is also opened to display status and various messages.

The main window of Tovek Agent:



Query window - the upper pane - is for entering fulltext queries. Other tabs are used to specify options, select sources, and to work with query conditions. The lower pane contains a list of retrieved documents, the result list.

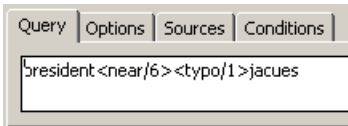
There are three indicators in the status bar. From left to right they show the number of documents in the result list, the number of documents that were retrieved by the search, and the total number of documents in all the selected sources that were searched through.

When a search is actually running there is also a progress bar and the search timer displayed in the status bar.

## Search Settings

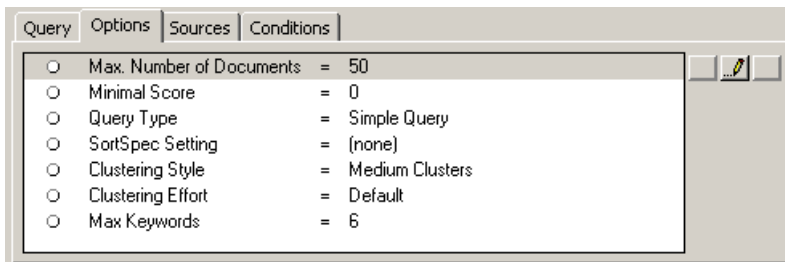
### Query

On the **Query** tab you enter the fulltext query. It must be of the query type set on the **Options** tab (see Queries chapter).



### Options

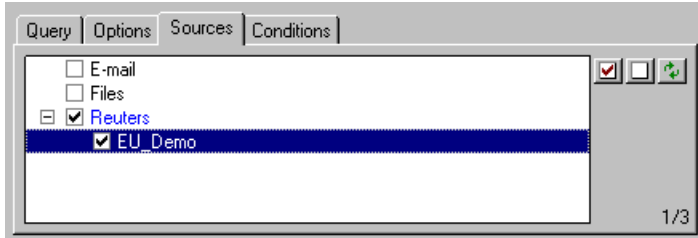
**Options** tab is used to specify the query type, the limit for the maximum number of documents in the result list, and a minimal score for retrieved documents. Additional options, such as SortSpec or clustering settings, might also appear here. Options can be changed by double-clicking the item, by highlighting it and pressing the **Enter** key, or by clicking the **Change** button.



Two query types are currently supported: **Simple Query** and **Free Text** query. **Free Text** query searches for documents containing a text similar to the query text. This kind of query does not need to follow any rules. **Simple Query** should follow a Verity Query Language syntax described in a separate manual.

## Sources

The search will be performed against sources selected on the **Sources** tab. Whether a source is selected is indicated by the checkbox in front of its name. If you select only some sources of a tree, those checkboxes will become grey.



Navigation and selection can be performed using the mouse or common Windows keys: arrow keys (up and down), spacebar (toggle selection), and [+], [-], and [\*] (working with a tree).



**Select All** button selects all the sources and **Select None** clears the selection from all.

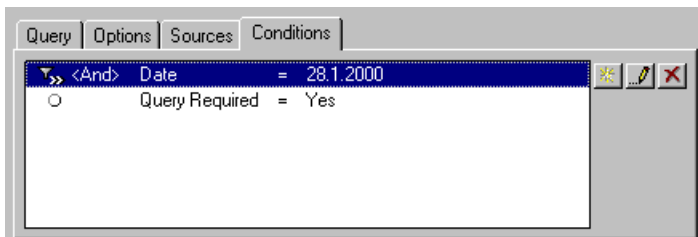


**Refresh** button updates the list of sources. This might be helpful when a new source was just created or connected, especially if you are using Topic Agents view mode described later.

In the bottom right corner there is the count of selected sources and the total number of sources that can be searched at this time.

## Query Conditions

On the **Conditions** tab you can work with query fields. The actual list of fields depends on selected sources and the way they were prepared. Additional information about fields is in the section Working with Fields.





Conditions are added using the **Add Condition** button:

Field name and operator are chosen from the list. Field value is typed in. If the **Required Condition** checkbox is selected, documents must meet this condition in order to be retrieved. If a condition is not required, it affects only the score of documents. By default the **Required Condition** is checked.

If a selected field is of the date type, the **Enter Date** dialog box must be used for entering values. It is displayed by pressing the selection button:

**Short Date Format** specifies how dates are displayed in the list of conditions.

If the **Query Required** is set to **Yes**, then in order to be retrieved a document must match both the fulltext query and all the required conditions. If the **Query Required** is set to **No**, all documents matching conditions on the **Conditions** tab will be retrieved, i.e. they do not have to be retrieved by the fulltext query. The documents also matching the query will have a higher score.



Selected entry in the list can be modified by the **Change** button.



You can delete selected entry using the **Remove Condition** button.

## Save Search Defaults

The **File/Save Search Defaults** command saves as search defaults the following query properties: the contents of Options, Sources, and Conditions tabs, and the columns of the result list.

## Running the Search



When a query is prepared and all options are set, you can start your search by the **Query/Search** command, by clicking the **Search** toolbar button, by pressing the **F5** key or by pressing the **Enter** key if the cursor is in the query edit box.

## The Result List

After the search is performed, a list of the retrieved documents is displayed in the lower pane of Tovek Agent. Each line contains information about one document. Layout is controlled by the **View/Fields** command.

Score	TT Source	Document
0.68	Reuters.EU_Demo	001006 it POLAND: UPDATE 1-UK'S BLAIR WANTS
0.68	Reuters.EU_Demo	001006 it POLAND: UK'S BLAIR WANTS EU TO EXI
0.67	Reuters.EU_Demo	001005 it UK: BLAIR TO GIVE VIEW OF EUROPE IN
0.67	Reuters.EU_Demo	000928 it UK: UK'S BLAIR TO SET OUT VISION OF
0.66	Reuters.EU_Demo	001011 it UK: BRITAIN'S BLAIR FACES TOUGH TES
0.65	Reuters.EU_Demo	001014 it FRANCE: UPDATE 4-EU ROWS ON REFC
0.64	Reuters.EU_Demo	001014 it FRANCE: EU LEADERS BACK RIGHTS CH
0.64	Reuters.EU_Demo	000928 it UK: ANALYSIS-DANISH 'NO' USHERS IN
0.63	Reuters.EU_Demo	001000 SOUTH KOREA: UPDATE 3-ASIA: EUROPE

Documents can be sorted by clicking a column heading, for example to get them sorted by their name. The sort column is marked by an arrow next to the column label, indicating ascending or descending sort order, which can be reversed by clicking the same column heading again.

Column width can be adjusted by dragging the boundary of the right side of the column heading. If you double-click this boundary, column width will be adjusted automatically to accommodate the largest entry of the column.

## View Document

Document text with highlighted words can be shown by selecting documents in the result list and choosing the **View/View Document** command, by clicking the **View Document** toolbar button, or by right-clicking the document and selecting **View Document**.

If **View Document** is set as a Default Document Action by the **Tools/Options** command, document text can also be displayed by double-clicking a line in the result list or selecting a document and pressing **Enter** key.

Tovek Viewer is then opened and will show the document text with words relevant to the query highlighted. Tovek Viewer is described later.

## Open Document

Document can be opened by selecting document in the result list and choosing the **View/Open Document** command, by clicking the **Open Document** toolbar button, or by right-clicking the document and selecting **Open Document**.

If **Open Document** is set as a Default Document Action by the **Tools/Options** command, document can also be opened by double-clicking a line in the result list or selecting a document and pressing **Enter** key.

## Document Information

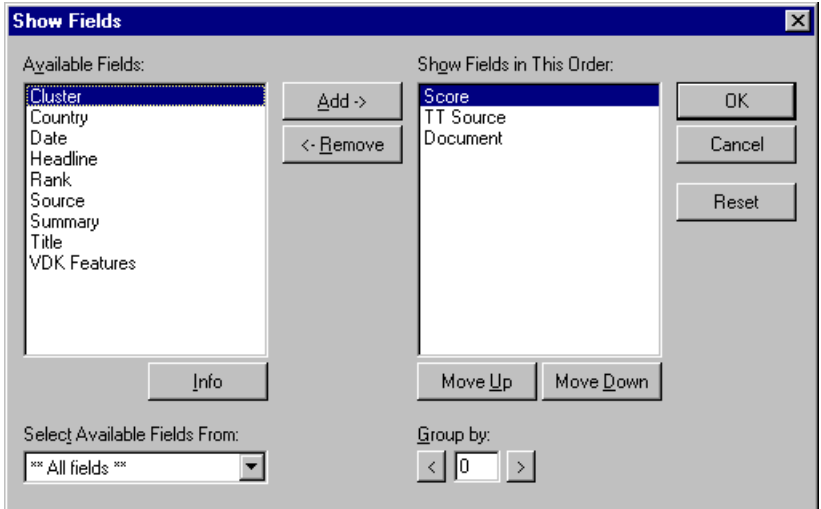
Information about a document can be shown by selecting a document in the result list and choosing the **View/Document Info** command, by clicking the **Document Info** toolbar button, or by right-clicking the document and selecting **Document Info**.

**Document Properties** window will be opened and it will show general information about the document and the list of words matching the current query.

You can copy the list of words in the clipboard by **Copy** button. If you hold down the **Shift** key, the words will be copied with the number of instances.

## Displayed Fields

Which fields should be displayed in the result list is specified by the **View/Fields** command:



The list on the left contains available fields that can be moved to the list on the right containing fields that will go to the result list. Fields can be moved between the lists by selecting the field name and clicking **Add** or **Remove** buttons or by double-clicking a field in the list.

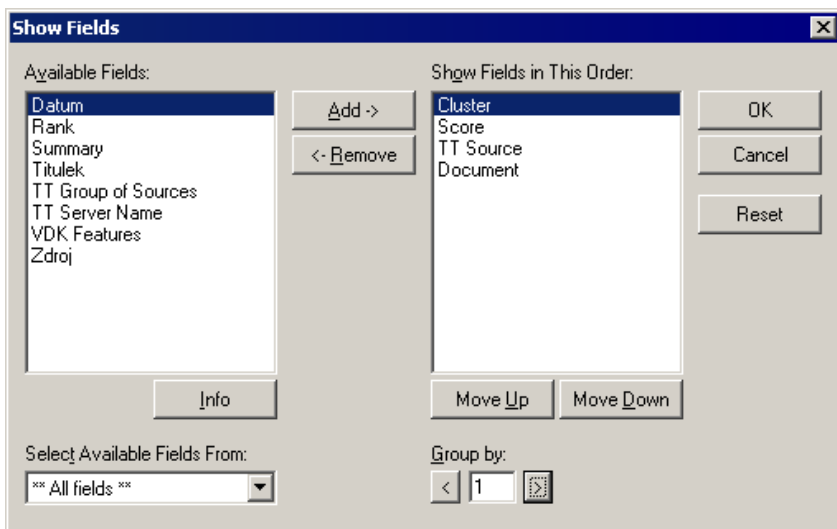
Fields in the result list will be displayed in the same order as they appear in the right list. Their order can be changed using the **Move Up** and **Move Down** buttons.

It is also possible to group documents by the contents of fields. This is specified by the **Group by** setting. Documents are grouped by the topmost fields of the right list.

For example, when **Group by** is set to 1 and the first field is Date, the result list might look like this:

Score	TT Source	Document
2000-10-14		
0.65	Reuters.EU_Demo	001014 it FRANCE: UPDATE 4-EU ROWS ON F
0.64	Reuters.EU_Demo	001014 it FRANCE: EU LEADERS BACK RIGHT
0.44	Reuters.EU_Demo	001014 it FRANCE: UPDATE 1-UK'S BLAIR RU
2000-10-15		
0.62	Reuters.EU_Demo	001015 it FRANCE: CORRECTED - ANALYSIS-
2000-10-17		
0.45	Reuters.EU_Demo	001017 it UK: BLAIR HEADS FOR ASIA-EUROF

The documents can be grouped according to common context (clustering). The grouping setting for clustering is as follows:



# Exporting Documents

## Marking Documents for Export

You can export retrieved documents into other applications for viewing or further processing. Documents can be marked for export by selecting them using the standard methods, by choosing the **Tools/Mark for Export** command, or by the **Ctrl+E** keyboard shortcut.

Additional way how to mark and unmark documents for export is from Tovek Viewer using the **Tools/Mark for Export** command or the toolbar button, allowing you to decide the document's status while you read its text.

## Html Export

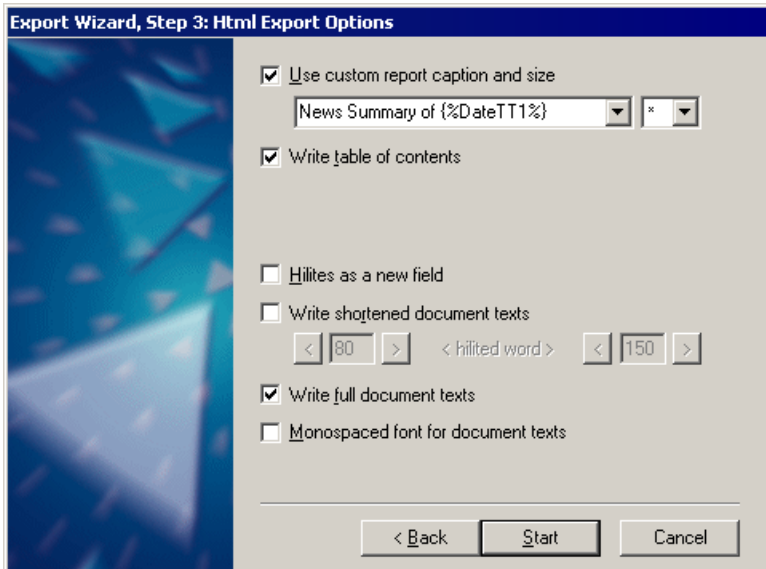
The **Html/XML Export** command launches the export wizard. In the first step select the actual export type, but please note that for the html export with the InfoRating analysis you need to have the licence for InfoRating as well.

All made settings are saved for a next export.

For a plain html export in the second step you can specify the output filename, whether the file should be opened (i.e. launched by the operating system) after the export is complete, and optional custom settings, including your own report header and footer, that can be loaded from a special configuration file. Concerning the output filename, if you do not specify one the file will be created in the system directory for temporary files, using the default name for a given export type.





In the third and the last step you specify the actual export options. If the **Use custom report caption and size** is selected you can specify your own report caption and its font size; the size corresponds to the html command `<font size=N>` where N can be from 3 to 7 and the asterisk means the default size. In the caption text you can use three macros, **{%DateWL%}**, **{%DateWS%}** and **{%DateTT1%}**, which, respectively, will be replaced by the system date on the current machine, in the Windows Long format, Windows Short format, and the Tovek Tools internal date format (YYYY-MM-DD). The **Write table of contents** controls whether there will be a table with all the documents at the beginning of the export, with links to document texts (if exported) and with statistics saying how many documents were actually exported etc. If **Highlights as a new field** is checked the list of highlighted words for


every document will be included in another field both in the table of contents and in the document text area. **Shortened document texts** refer to option to write out only the highlighted words and a small number of characters preceding and following those words, allowing you to go quickly through the document texts. If **Write full document texts** is checked the full document texts will be exported, and it is possible to include both shortened and full documents in one export. **Monospaced font** option controls more than just the font - generally it should be used to export documents that were indented by the space characters.






## Resulting File

You can move among the links in the resulting .html file. By clicking the rank number in the table with the document list you can view the shortened or full text of document (if there is any in the resulting file).

Possible shortened texts will be under the table with the document list. In the heading of the shortened text there are buttons for going to previous , or next  document, back to table with the document list  and possibly to the full text of this document  (if present in the file). Found words are highlighted in the text. If the shortened text contains only a part of URL, the link will still be working.

Possible full texts will be stated under the shortened texts. In the heading of the full text there are buttons for going to previous , or

next  document, back to table with the document list  and possibly to the shortened text of this document  (if present in the file). Found words are highlighted in the text.

## Text Export

**Text Export** will save all the selected documents into one text file.

You must provide the output file name. If this file already exists, it will be overwritten without any warning.

Documents can be separated by a string that can be entered after selecting the **Add [separators] Between Documents**.

Fields will be written in the beginning of every document when [add fields] **Before the Documents** is selected. All fields from the result list will be used.

The last option is the output code page. It can be either **Standard** (i.e. Windows) or **OEM Code Page**, which depends on the operating system.

All settings will be stored for the next time you choose the **Text Export**.

## View Multiple Documents

This command retrieves texts of all the documents marked for export and then presents them in one Tovek Viewer window. Documents are separated in the viewer, there are additional lines with technical information attached to every document, and the **Previous/Next Document** commands are operating within this set of documents.

## Extract Adjacent Words

This command is intended to extract highlighted (found) words from the selected documents, together with words adjacent to the highlighted ones. You can specify the number of words preceding the found word and the number of words that are following it. At least one these numbers must be greater than zero.

The export is then performed, words are analysed and extracted, and the result is put on the clipboard from where it can be pasted into any program. Very suitable application for processing these results is a spreadsheet because the final words will be pasted into individual cells and so can be further analysed.

There are three blocks of the data in the result set. First there are parts of the original documents from where the words have been taken. Then there are all the words present in those short pieces of text, and in the last part there are only words that might be names (with first letter in capital).

For example, when you search for a word president and then select **Extract Adjacent Words** with no preceding and two following words, after you paste the results into the spreadsheet the most of the words in the last block will be the actual names of some mentioned presidents:

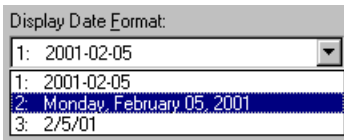
A	B	C	D	E	F	G	H	I	J	K
President Shamun asks			President Shamun	asks				President Shamun		
President Musharraf in			President Musharraf	in				President Musharraf		
president! When I			president When	I				When	I	
president had told			president had	told						
President Musharraf survives			President Musharraf	survives				President Musharraf		
President Musharraf -			President Musharraf					President Musharraf		
President Leghari dismisses			President Leghari	dismisses				President Leghari		
president, pro-Syrian Emile			president pro-Syriar	Emile						Emile
President. Looks like			President Looks	like				President Looks		
president. With this			president With	this				With		
president Hashemi Rafsanjani.			president Hashemi	Rafsanjani				Hashemi	Rafsanjani	
President Musharraf. He			President Musharraf	He				President Musharraf	He	
President Kuchma denies			President Kuchma	denies				President Kuchma		
president and 'foreign			president and	foreign						
President's jokes US			President jokes	US				President's		US
president, Middle East			president Middle	East				Middle	East	
President Musharraf needs			President Musharraf	needs				President Musharraf		
president. 2007 June			president 2007	June						June
President Chirac's UMP			President Chirac's	UMP				President Chirac's	UMP	
President Musharraf's remarks			President Musharraf	remarks				President Musharraf's		

## Options Command

After using the **Tools/Options** command you can change user settings.

**Default Document Action** specifies which action will be performed after double-clicking a document in the result list. The document can be displayed with highlighted words, can be opened in a different application, or more information about it can be shown, including the list of retrieved words.

**Display Date Format** allows you to specify how to show the fields with dates. Choices are the internal date format and both the long and the short Windows date format which might be customized using the Windows Control Panel.



**Display Score Format** controls how the document score is presented in the result list, whether it is a number only, a horizontal bar, or a horizontal bar preceded by the score as a number.

If the **Show Complete Documents Names** checkbox is not selected, a part of the document key that might be added after the `##%` special string will not be displayed. Example of both setting:

Score	Source	Document
1.00	test	Chapter 5
1.00	test	Chapter 5 <code>##%</code> x1.fed_5207

If **View Documents in One Window** is checked, Tovek Agent will try to have only one viewer window opened and to show all documents in it. However, when multiple documents are selected and **View Document** command is chosen, they will be opened in their own windows.

**Select First Highlighted Word** controls whether the selection in Tovek Viewer will be placed on the first highlighted word in a document or not. It is similar to choosing the **View/First** [highlight] command in the Tovek Viewer.

When the **Topic Agents View** is checked, the window layout for the subsequent new Tovek Agents will be this one:

The screenshot shows the Tovek Agent interface with the following components:

- Left Panel:** A tree view of sources including bbc, Files, novosti, ODBC, Reuters (checked), Hospodářské noviny, moje, extrakce\_cisel, pom, dokumenty, tovek, my, Tovek-CDM, and Tovek-web.
- Query Window:** Settings for a search on 'united nations' with options like Query Required (Yes), Max. Number of Documents (50), Minimal Score (0), Query Type (Simple Query), and SortSpec Setting (none).
- Result List Table:**

Score	Date	Title	TT Source	Document
0.88	2000-10-24	DIARY - POLITICAL AND GENERAL ...	Reuters	001024 it UK: DI
0.87	2000-10-20	REUTERS BUSINESS DIARY FOR ...	Reuters	001020 it UK: RI
0.85	2000-10-02	HOLBROOKE PUSHES FOR NEW S...	Reuters	001002 it UNITE
0.85	2000-10-23	DIARY - POLITICAL AND GENERAL ...	Reuters	001023 it UK: DI
0.82	2000-09-27	ANNAN TO VISIT SWITZERLAND, ...	Reuters	000927 it UNITE
0.82	2000-10-03	EU WOULD REDUCE US SHARE O...	Reuters	001003 it UNITE
0.82	2000-10-04	ANNAN URGES EU TO HELP DEVE...	Reuters	001004 it FRANI
0.82	2000-10-10	NUREMBERG HUMAN RIGHTS OFF...	Reuters	001010 it GERM
0.82	2000-10-21	ISRAEL CONDEMNED AGAIN AT U...	Reuters	001021 it UNITE
0.80	2000-09-30	REUTERS WORLD NEWS HIGHLIG...	Reuters	000930 it UK: RI
0.80	2000-10-04	DENKTASH, TURKEY FAULT EU A...	Reuters	001004 it FRANI
- Document Viewer:** A table with columns 'Field Name' and 'Value' showing:
 

Field Name	Value
1 Score	0.85
2 Date	2000-10-02
3 Title	HOLBROOKE PUSHES
4 TT Source	Reuters
5 Document	001002 it UNITE NAT
- Main Text Area:** Displays the document content for the selected entry, including the title 'UNITED NATIONS: HOLBROOKE PUSHES FOR NEW STRUCTURE IN UN BUDGET.' and the start of the article text.

The source selection window is located on the left side. Windows on the right, top to bottom are: the query window, combined search settings and query conditions, and the result list. At the bottom there is the document viewer, possibly with document fields. To display documents in standard, separate, Tovek Viewer, hold down the **Shift** key when choosing the **View Document** command.



Left from the document text can be viewed either second instance of the text of the same document or list of fields of this document (accept the Rank field). You can switch between them using the buttons on the left.

After changing the **Topic Agents View** option, it is needed to start a new Tovek Agent window to see the changes.

## Query History



You can browse and select previous queries using the query history. To display it, select **Tools/Query History** command, click the **Query History** toolbar button or press the **Ctrl+H** keys. If this feature is not activated, you will be prompted to confirm that you want to turn it on. All the following queries will then be stored. If query history has already been activated, a list of previous queries will be shown.

The queries can be removed from the list one by one (or the selection) using the **Remove** button or all together using the **Clear All** button.

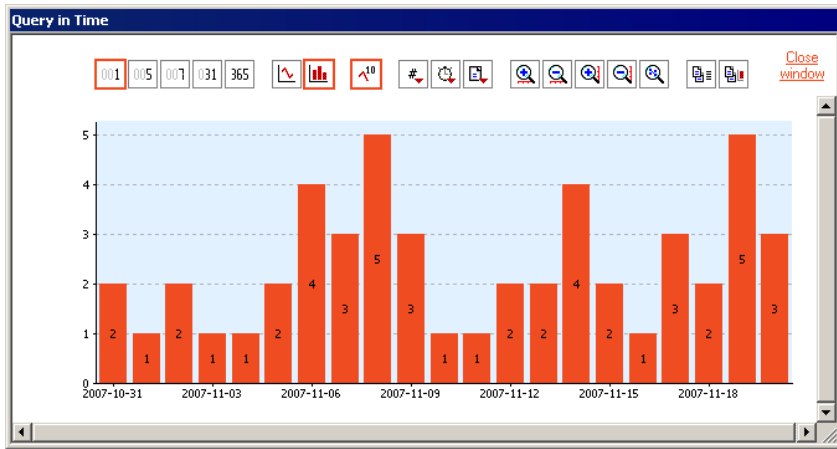
## The Operator Submenu

The context menu of Tovek Agent query window contains the **Operator** submenu. Commands from this submenu insert a text into the query window, on the current cursor position:

And
Or
<Near>
<Near/10>
<Phrase>
<Sentence>
LN
eu

## Query in Time

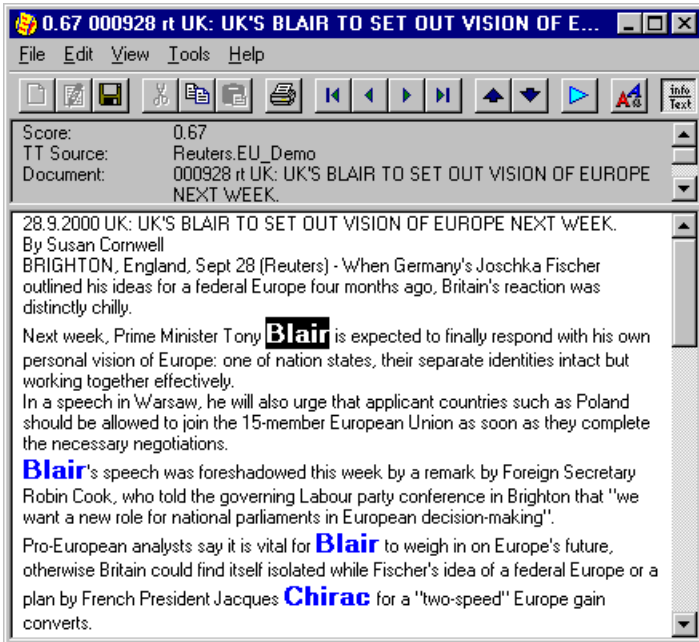
The **Tools/Query in Time** command, or the **Ctrl+Q** shortcut, opens a window showing how the retrieved documents are related to the time, allowing you to do various time analyses of the search results. For this feature to work you need to have at least one field in the result list that contains date:



Using the buttons you can select showing how many documents were there for the query on respective days, working days, weeks, months, years; select the graph type; show or hide values; select which values to show and which date column and documents should be used.



## Viewing documents - Tovek Viewer











Tovek Viewer shows documents retrieved by Tovek Agent. Documents are displayed as text with highlighted words and the document text is exactly the same as the text used for indexing and searching:




In the upper pane there are contents of the fields viewed in the result list. In the main pane there is a text of the document with highlighted found words.

The list of Tovek Viewer actions is stated in the following table:

Button	Menu Command	Function
	File/Open Document	Opens a document in its associated application.
	File/Save As	Saves the document into a file. Document can be saved in an RTF format with highlights or as a plain text. If <b>View/Fields</b> is selected, the fields will also be saved to the output file

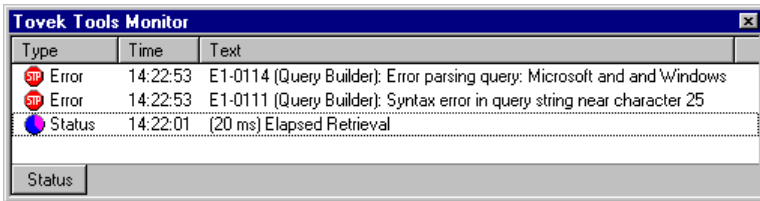
Button	Menu Command	Function
	Edit/Copy	Copies the selected part of the document.
	File/Print	Prints the document.
	View/First	Moves selection to the first highlighted word of the document.
	View/Previous	Moves selection to the previous highlighted word of the document.
	View/Next	Moves selection to the next highlighted word of the document.
	View/Last	Moves selection to the last highlighted word of the document.
	View/Previous Document	Shows the previous document according to the Tovek Agent result list.
	View/Next Document	Shows the next document according to the Tovek Agent result list.
	Tools/Mark for Export	Toggles the marked state for given document. This state is also updated in the Tovek Agent result list.
	Tools/Text Styles	<p>Enables selection from predefined text styles.</p> <p>Enables change of setting of default styles (named Print, Table and View) and define up to 20 user styles. You can delete selected style using the <b>Remove</b> button. After pressing the <b>Set Default</b> button, the selected style becomes default for the next document text viewing.</p> <p>If multiple languages are used for different sources, a separate set of fonts within the style can be assigned to documents based on their language. You can add another language after pressing the <b>Add</b> button in the Fonts for Style area.</p> <p>You can change the background colour of the found words (one colour for all languages). If the <b>Automatic URL</b></p>

Button	Menu Command	Function
		<p><b>Recognition</b> option is on, a text beginning with „http:“ will be a link. If you click it, a window with this site will be opened in the default internet browser.</p> <p>After pressing the &lt;#&gt;123&lt;/#&gt; button you can change the font colour for extracted numbers, see Indexing Documents – Index Manager, Options on the Advanced Tab, Document Text Parsing.</p>
	View/Fields	Shows or hides the upper pane containing fields from the result list. This setting also controls whether fields are saved or printed together with the document text.
	Edit /Select All	Selects the whole text of the document.
	Edit /Find	Finds the given text in the document text.
	Edit /Find Next	Finds the next instance of the given text in the document text.
	Edit /Find Previous	Finds the previous instance of the given text in the document text.
	View/Toolbar	Shows or hides the toolbar.
	View/Status Bar	Shows or hides the status bar.
	View/Tovek Agent	Activates/opens the Tovek Agent.
	View/Index Manager	Activates/opens the Index Manager.

## Tovek Tools Monitor

Tovek Tools Monitor displays various messages and shows tasks currently running inside the Tovek Tools engine.

The **Log/Status** button toggles between the status window and the log window. When an error message is shown, the monitor window will be activated and the last error message selected.



Lines can be selected (**Ctrl+A** selects all), copied using **Ctrl+C**, or deleted by pressing the **Del** key. Copying messages might be useful when messages should be sent to administrators for dealing with problems etc.



The monitor window can be displayed by double-clicking an arrow in the status area of the system taskbar. This arrow indicates that Tovek Tools are running and its colour is red when there is a work in progress. If



there are any errors in the log the arrow is displayed on a yellow background, which will revert to the normal one after either opening the log window or deleting all the error messages. Any subsequent new error will make the background yellow again.



If this arrow is right-clicked, the pop-up menu will appear. **Open** shows and activates Tovek Tools Monitor window. Commands at the bottom of the menu will activate or start the respective applications. This list of applications depends on the actual licence and shows only those parts of Tovek Tools which the user is allowed to use.

**Exit Tovek Tools** command from the pop-up menu (shown when an arrow in the status area of system taskbar is right-clicked) will shut down all Tovek Tools applications and then the internal engine. This command will not prompt you to save active queries so it should be used with care.