IDOL Data Admin

Software Version 12.2

User Guide

MICRO FOCUS®

Legal notices

Copyright notice

© Copyright 2019 Micro Focus or one of its affiliates.

The only warranties for products and services of Micro Focus and its affiliates and licensors ("Micro Focus") are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. Micro Focus shall not be liable for technical or editorial errors or omissions contained herein. The information contained herein is subject to change without notice.

Documentation updates

The title page of this document contains the following identifying information:

- Software Version number, which indicates the software version.
- Document Release Date, which changes each time the document is updated.
- Software Release Date, which indicates the release date of this version of the software.

You can check for more recent versions of a document through the MySupport portal. Many areas of the portal, including the one for documentation, require you to sign in with a Software Passport. If you need a Passport, you can create one when prompted to sign in.

Additionally, if you subscribe to the appropriate product support service, you will receive new or updated editions of documentation. Contact your Micro Focus sales representative for details.

Support

Visit the MySupport portal to access contact information and details about the products, services, and support that Micro Focus offers.

This portal also provides customer self-solve capabilities. It gives you a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the MySupport portal to:

- Search for knowledge documents of interest
- Access product documentation
- View software vulnerability alerts
- Enter into discussions with other software customers
- Download software patches
- Manage software licenses, downloads, and support contracts
- Submit and track service requests
- Contact customer support
- View information about all services that Support offers

Many areas of the portal require you to sign in with a Software Passport. If you need a Passport, you can create one when prompted to sign in. To learn about the different access levels the portal uses, see the Access Levels descriptions.

Contents

Chapter 1: Introduction

This section gives an overview of Micro Focus IDOL Data Admin and its structure.

IDOL Data Admin

Micro Focus IDOL Data Admin (formerly IDOL Search Optimizer) allows you to manage data indexed in IDOL servers to optimize the search process for your end users. You can create and modify promotions or keywords to predefine the results that are returned to users, and control how users view them. You can also view statistical information to help you to refine the rules that you created, and make them more effective.

For information on how to install and access IDOL Data Admin, see the *IDOL Data Admin Adminsitration Guide.*

The IDOL Data Admin interface allows you to carry out the following tasks:

- Display a document or a set of documents to the user based on specified criteria (see Promotions, on page 16). You can also pin documents to a fixed position in the results list.

- Set up and manage a list of terms that are automatically excluded from any query, or create a list of synonyms so that when users search for particular words, the results also include synonyms of their search terms (see Keywords, on page 13).

- View statistics about the business rules you defined, for example, top search terms or zero hits terms (see Overview Page, on page 12).

- Test your search results to help you to understand why a search returns a particular set of results. To view results for a search, type your search terms into the search box at the top of the page, then press ENTER.

  > **TIP:**
  > You can also view the results for the top 10 most popular search terms from the Overview page.

- View the full text of a document in a new window in the IDOL Data Admin interface by clicking the document title or the icon next to the document. Alternatively, you can click a link with the wheel button on your mouse to open a document in a new tab in your web browser.

- Use Answer Bank to administer a store of reference questions and answers that you set up using *IDOL Answer Server*. For more information, see Answer Bank, on page 28.

The IDOL Platform

At the core of IDOL Data Admin is the *Intelligent Data Operating Layer* (IDOL).

IDOL gathers and processes unstructured, semi-structured, and structured information in any format from multiple repositories using IDOL connectors and a global relational index. It can automatically form a contextual understanding of the information in real time, linking disparate data sources together based on the concepts contained within them. For example, IDOL can automatically link concepts contained in an e-mail message to a recorded phone conversation, that can be associated with a stock trade. This information is then imported into a format that is easily searchable, adding advanced retrieval, collaboration, and personalization to an application that integrates the technology.

For more information on IDOL, see the *IDOL Getting Started Guide.*

IDOL Data Admin Structure
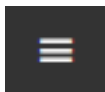
IDOL Data Admin consists of several pages, which you open by clicking the page titles along the navigation side bar to the left of the main window.
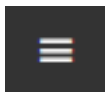
Click ☰ to collapse the side navigation bar and increase the size of the main content display.

> **NOTE:**
> Depending on your system and your user permissions, you might not see the
> **Search Optimizer** or **Answer Bank** sections. If you cannot see a section you need access to, contact your system administrator.

Components

IDOL Data Admin uses the following IDOL components:

- **Community**. The IDOL Community component manages authentication and users. IDOL Data Admin stores information about users and administrators in IDOL Community.

> **NOTE:**
> IDOL Community requires an IDOL Agentstore subcomponent. However, you do not need to configure the details of the IDOL Community Agentstore component in IDOL Data Admin.

For information about how to set up and configure Community, see the *IDOL Server Administration Guide* and the *IDOL Server Reference*.

- **Content**. The IDOL Content server indexes and stores the documents that your users search. IDOL Data Admin applies the rules that you create to documents in this IDOL Content server, and the searches that your users run against this server.

  For information about how to set up and configure IDOL Content, see the *IDOL Server Administration Guide* and the *IDOL Server Reference*.

- **View**. IDOL Data Admin uses the IDOL View Server to enable near-native document viewing.

  For information about how to set up and configure IDOL View Server, see the *IDOL Server Administration Guide* and the *IDOL Server Reference*.

Search Optimizer Components

IDOL Data Admin uses the following components for the Search Optimizer functionality, to manage, store, and apply the rules that you define.

- **Query Manipulation Server**. The Query Manipulation Server (QMS) applies the rules that you create and manage in IDOL Data Admin. When a user runs a search, QMS searches for appropriate rules in the QMS Agentstore, and applies them to the query or the results that return. The user interface also allows you to create QMS rules.

  For information about how to set up and configure QMS, see the *QMS Administration Guide*, and the *QMS Reference*.

- **QMS Agentstore**. The Agentstore that QMS uses to store the rules that you create in IDOL Data Admin.

  For information about QMS Agentstore, see the *QMS Administration Guide*.

- **IDOL Statistics Server**. The IDOL Statistics Server stores information about the queries and terms run in your IDOL server.

  For information about how to set up and configure Statistics Server, see the *QMS Administration Guide.*

Answer Bank Components

IDOL Data Admin uses the following component for the Answer Bank functionality, to set up and maintain the store of reference questions and answers.

- **Answer Server**. Answer Server uses IDOL technology to provide specific and concise answers to user questions. The user specifies a question, and the server returns as specific an answer as possible.

  For information about how to set up and configure Answer Server, see the *Answer Server Administration Guide* and *Answer Server Reference*.

Related Topics

- Edit IDOL Data Admin Configuration Settings, below

Edit IDOL Data Admin Configuration Settings

The first time that you log on to IDOL Data Admin, the Settings Wizard guides you through the setup

process. In subsequent sessions, click   , then click **Settings** to use the **Settings** page to edit the IDOL Data Admin configuration file.

The Settings page allows you to:

- Specify the connection type, host, port, and logon type information for the IDOL Community component that handles IDOL Data Admin user authentication.

- Specify the connection type, host, and port information for the IDOL Content server where your content is indexed. You can also specify whether you have a **Standard** setup (where you have a single IDOL Content component and send all commands directly to that component), or a **Distributed** setup (where you have multiple IDOL Content components and send commands to a Distributed Action Handler (DAH), which distributes them appropriately).

- Specify the connection type, host, and port information for the View server to use to view your documents in a web browser. You can also specify the reference field to use for each document, in reference mode, and the connector host and port information for connector viewing mode.

- Specify the connection type, host, and port information for the Query Manipulation Server that you want to manage using IDOL Data Admin.

  You can also specify whether to use index mode or dictionary mode if you want to use QMS to provide query completion. For more information, see the *QMS Administration Guide*, and the *QMS Reference*.

- Specify the connection type, host, and port information for the Agentstore that Query Manipulation Server uses for data storage. You can also specify whether you have a **Standard** setup (where you have a single Agentstore component and send all commands directly to that component), or a **Distributed** setup (where you have multiple Agentstore components and send commands to a DAH, which distributes them appropriately).

- Specify the connection type, host, and port information for the IDOL Statistics Server.

- Specify the connection type, host and port information, and system name for Answer Server. The system name corresponds to the Answer Server Answer Bank configuration. For more information, see the *Answer Server Administration Guide*.

- Test your server connections.

- Set up an external search engine to query when a user wants to search the web.

IDOL Data Admin validates any changes to your server settings, and prompts you to correct any information that is not valid before you can save your settings.

Related Topics

- Components, on page 6

View Notifications

IDOL Data Admin records details of any actions that users take during a session (for example, creating a new promotion, or adding terms to the blacklist). You can view details of the last 5 actions in the Notifications list.

To view notifications, click in the toolbar at the top of the page. The number of unread notifications, if any, is highlighted.

The Notifications list shows the following information for each action:

- The action taken.

- The name of the user who carried out the action.

- The time that the action was completed.
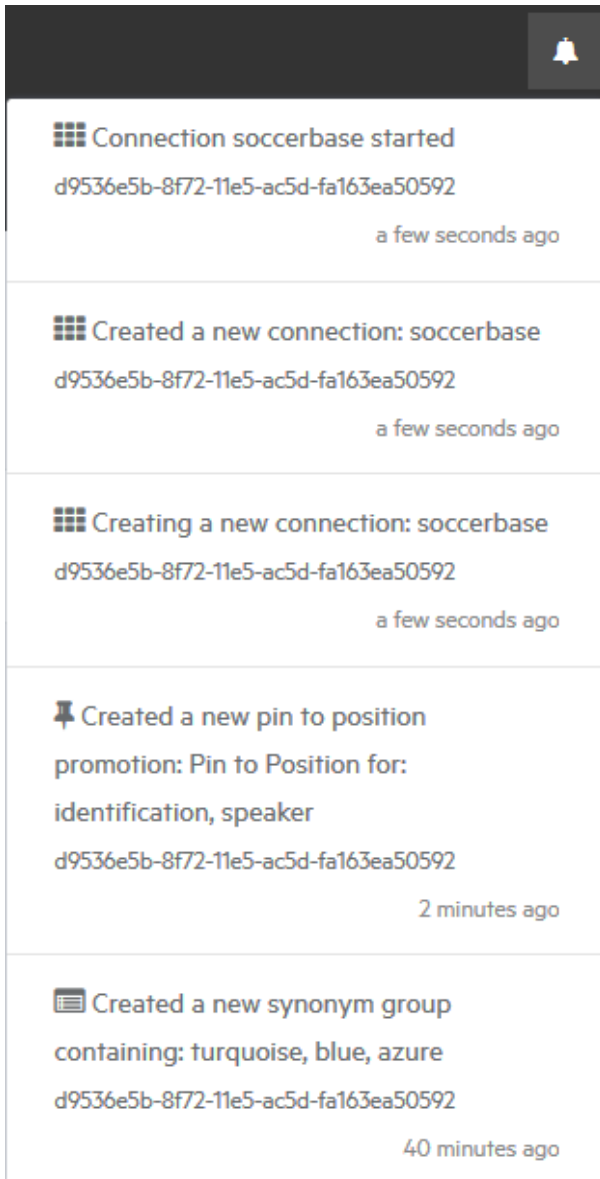
> **NOTE:**
> IDOL Data Admin does not store notifications across sessions; the Notifications list is cleared if you log out.

Edit User Information

The **User Management** page shows details for all the users in your IDOL Community component. You can use this page to create new user profiles, edit existing user profiles, and assign application roles to users. To open the **User Management** page, click ⚙, then click **Users**.

See the *IDOL Data Admin Administration Guide* for more details on user roles and privileges.

About Page

For more information about IDOL Data Admin, click , then click **About**. On the **About** page, you can view copyright, version, and licensing information for IDOL Data Admin.

Chapter 2: Search Optimizer

This section describes how to use the Search Optimizer section of IDOL Data Admin to administer your keywords and promotions.

Overview Page

The Search Optimizer Overview page provides statistics about the rules that you set up in IDOL Data Admin. You can use these statistics to help fine-tune your settings and monitor what your users see.

To open the Overview page, click **Overview** in the main navigation on the left of the page.

Monitor Number of Searches

IDOL Data Admin tracks the total number of searches within the last 24 hours, yesterday, and in the last week. The Overview page also provides information on queries in those time periods that returned no hits, both as a percentage of the total number of searches, and in absolute terms.

View Top Search Terms

You can view information on the top 10 most popular search terms in the last hour, day, or week. In the list of most popular search terms, you can click a linked term to run the search and view the results to help you to understand what the user actually sees. From the Search results page, you can:

- Promote documents or queries (see Promotions, on page 16).

- Edit or add synonyms or blacklisted terms (see Keywords, on the next page).

- View the unmodified results, without any promotions or keywords that you set up.

View Zero Hit Terms

The Zero Hit Terms bar graph shows the number of searches that produced no results during the selected time period (in the last day, or in the last week). For the daily view, the searches are divided by hour, for the weekly view, by day. The graph also shows the total number of searches during the selected time period.

You can view information on the top 10 search terms that produced no results. In the list of terms, you can click a linked term to add synonyms for that search (see Synonyms, on the next page). For

example, if the search term *city* appears in the Zero Hit Terms list, you can create a synonym group for that term containing the terms *metropolis* and *town*. When users search again for the term *city*, instead of the search returning no hits, results that contain the terms *metropolis* and *town* are also included.

View Top and Bottom Promotions

You can view details of the top promotions (that is, the promotions that performed best in the last hour, day, or week) and bottom promotions (that is, the least successful promotions in the last hour, day, or week). Click a promotion title to go to the Promotion Details page for that promotion, where you can fine-tune the criteria for the promotion. See for more information.

Keywords

This section describes how to use synonyms and blacklists to manipulate the results that are returned to your users.

Synonyms

You can create a list of synonyms of words so that when users search for particular words, the results also include synonyms of their search terms. For example, you can set up a synonym group so that when a user searches for *dog*, the results that they see also include documents with the words *labrador*, *poodle*, *terrier*, and so on.

> **CAUTION:**
> You cannot add Boolean operators such as AND, OR, or NOT to your synonym groups.

To create a new synonym group

1. In the main navigation on the left of the page, click **Keywords**. The Keywords page opens.

2. Click **New**.

3. Click **Synonyms**.

4. Click the arrow next to the Language list, then select the language for the synonym group.

5. Click **Continue**.

6. In the text box, type the terms that you want to add to the synonym group, then click **+**. Separate multiple terms with spaces. To remove a term, click the **x** next to it.

   > **TIP:**
   > To include a phrase in your synonym group, include the phrase in quotation marks. For example, *bengal "norwegian forest cat" burmese*. If a phrase synonym group is matched, IDOL Data Admin displays the expanded query after the QMS rules were applied.

7. Select the synonym type, **OR** or **SYNONYM**. The default type, **OR**, uses an OR query operator

between synonymous terms in the expanded IDOL query. The **SYNONYM** type uses the newer SYNONYM query operator.

Both synonym types match documents that contain any of the synonym terms, but the result relevance scores (and result ordering) might differ. With OR, IDOL treats all the synonyms as separate query terms, and if a document matches more synonyms it has a higher score. With SYNONYM, IDOL scores the results as if all synonyms were a single query term, so that a document that matches multiple different synonyms is equivalent to a document with multiple occurrences of one synonym.

8. Click **Finish**. IDOL Data Admin adds the terms that you entered to the synonym group, then takes you to the search results for the group. This allows you to test the synonym group that you created to make sure it works as you expect.

You can view and edit your synonyms and other keywords on the main Keywords page (see Keywords Page, on the next page for more information).

Add a Database Match to a Synonym Group

After you create a synonym group, you can add a database match. The database match means that IDOL applies a particular synonym group to a query only if the query requests documents from the databases in the synonym rule.

To add a database match to a synonym group

1. On the **Keywords** page, find the synonym group in the list.

2. Click **+ADD DATABASE MATCH**.

3. In the list, select the databases that you want the synonym rule to apply to. IDOL applies the synonym rule to any query that requests documents from at least one of these databases (the user must request the database explicitly).

4. Click ✔.

Blacklists

The blacklist management features of IDOL Data Admin allow you to set up and manage a list of terms that are automatically excluded from any query. If a user searches for a term that you added to the blacklist, the search results that they see do not include the blacklisted term.

You can add terms to the blacklist from the Keywords page in IDOL Data Admin.

> **CAUTION:**
> You cannot add Boolean operators such as AND, OR, or NOT to the list of blacklisted terms.

To add terms to the blacklist

1. In the main navigation on the left of the page, click **Keywords**. The Keywords page opens.

2. Click **New**.

3. Click **Blacklisted Terms**.

4. Click the arrow next to the Language list, then select the language for the blacklisted terms.

5. Click **Continue**.

6. Type the terms that you want to add to the blacklist, then click **+**. Separate multiple terms with a space. To remove a term, click the **x** next to it.

7. After you have added all the terms that you want to blacklist, click **Finish**. IDOL Data Admin adds the terms that you entered to the blacklist.

You can view and edit your blacklisted terms and other keywords on the main Keywords page (see Keywords Page, below for more information).

Keywords Page

The main Keywords page provides information on all the synonym groups and blacklisted terms that you have set up in IDOL Data Admin.

To open the Keywords page, click **Keywords** in the main navigation on the left of the page.

From the Keywords page, you can:

- Add new synonyms or blacklisted terms to the keywords list (see Synonyms, on page 13 and Blacklists, on the previous page for instructions).

- Search the keywords list.

- Filter the page to show blacklisted terms only, or synonyms only.

- Filter the page to show synonyms and blacklisted terms in a particular language.

- Add or remove synonyms.

- Remove terms from the blacklist.

- Click a synonym to view the search results.

> **TIP:**
> The Keywords section on the right of the Search results page includes links that enable you to create synonyms or blacklisted terms from the query term. You can also view the results for a particular term.

To search the keywords list

- Type a word or part of a word in the search box at the top of the page. The keywords list refreshes to show only the synonym groups or blacklisted terms that contain the letters that you typed.

To page through the keywords list

- Scroll to the bottom of the results list and use the paging options to navigate the results. You can click the forward, back, first, and last buttons to page through the results, or click the page number of nearby pages:

«	‹	1	2	**3**	4	5	›	»
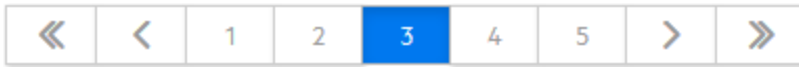
To jump to a page that is not listed, click the current page number (highlighted in blue) and type the number of the page to jump to.

To filter the keywords list by type

1. Click **All Types**.

2. In the list, click either **Blacklist** or **Synonyms**.

   The keywords list refreshes to show blacklisted terms only, or synonym groups only.

To filter the keywords list by language

- Click the arrow next to the Language list, then select the language that you want to view.

To remove synonyms or blacklisted terms

- Click the **x** next to the synonym or blacklisted term that you want to remove. IDOL Data Admin removes that term from the keywords list.

To add synonyms to a group

1. Click **+** next to the synonym group that you want to edit.

2. Type the synonym that you want to add to the group, then click ✔.

   IDOL Data Admin adds the synonym to the group.

Promotions

Promotions allow you to target specific content to users based on their search criteria, and to display that content separately from the main search results. You can also specify that specific content should display in a particular position in the search results.

You can set up the following promotion types in IDOL Data Admin:

- **Spotlight**. Spotlight promotions display content separately from the main search results when the user searches for terms that trigger the promotion. The following types of spotlight promotion are available:

  - **Sponsored**. Paid advertisements.

  - **Hotwire**. Promoted documents that are shown at the top of a results list for a particular keyword, but are noticeably distinct from the list.

  - **Top Promotions**. A list of documents (not advertisements) that you want to promote internally within your organization.

- **Pin to Position**. Promoted documents appear in the position that you specify when you set up the promotion.

Promotions Page

The main Promotions page lists the following information for each promotion that you set up in IDOL Data Admin:

- The type of promotion.

- The name of the promotion.

- The promoting query (in the case of query promotions).

To open the Promotions page, click **Promotions** in the main navigation on the left of the page.

On the Promotions page, you can set up a new promotion (see Set Up New Promotions, below), or you can click an existing promotion to go to the Promotion Details page and edit the promotion (see Edit Promotions, on page 19).

> **TIP:**
> You can also set up new promotions from the Search results page.

Filter the Promotions List

To search for specific promotions, type the terms that you want to search for in the search box. The list of promotions refreshes to show only those promotions that match the terms that you entered.

> **TIP:**
> You can search for multiple promotions simultaneously. For example, if you set up a Pin to Position Promotion with the trigger keyword *green*, and a Spotlight promotion with the trigger keyword *blue*, you can type *green blue* into the search box to list both those promotions on the main Promotions page.

You can also filter the Promotions list to show only promotions of a particular type.

To filter the Promotions list

1. Click the arrow next to **All Types**. A list of promotion types opens.

2. In the list, click the type of promotion that you want to filter on.

   The Promotions list refreshes to show only promotions of the type that you selected.

Set Up New Promotions

You can set up new promotions from the Promotions page, or from the Search page. You can promote individual documents, or you can set up query promotions. If you set up a query promotion, the entire results set for the promoted query is included when a user searches for the trigger term. For example,

you can set up a query promotion for the search term *cake* to include the entire results set for a search for the term *cake* in the results set when the user searches for *pudding*.

Use the following procedure to promote documents.

> **TIP:**
> You can also create promotions directly from the Search page instead of the Promotions page. In this case, Step 1 and Step 2 are not required.

To promote documents

1. In the main navigation on the left of the page, click **Promotions**.

2. Click **Promote Documents**.

3. Type your search terms in the search box at the top of the page, then press ENTER. The Search results page opens.

   > **TIP:**
   > You can view only documents in a specific language by clicking the arrow next to the Language list, then selecting the language that you require. In addition, you can sort your results either by relevance or by date.

4. Click **Promote documents**.

5. Select the check boxes next to the documents in the results list that you want to promote.

6. Click **Promote Items**.

7. Click the type of promotion that you want to create, then click **Continue**.

   a. If you chose to create a **Spotlight** promotion, click the type of Spotlight promotion that you want to create, then click **Continue**.

   b. If you chose to create a **Pin to Position** promotion, click **+** and **-** to set the position that you want the documents to appear in, then click **Continue**.

8. On the promotion triggers page, type the words that a user must search for to trigger the promotion, then click **+**. Separate multiple words with spaces. Enclose words that you want to be treated as a phrase in quotation marks (for example, "*burmese cat*"). To remove a term, click **x** next to a term.

9. Click **Finish**.

   IDOL Data Admin creates the promotion, and shows the Search results page with the results for the terms that you chose to trigger the promotion. This allows you to test your promotion to make sure it works as expected.

   If you created a Spotlight promotion, your promoted documents appear at the top of the results list. If you created a Pin to Position promotion, your promoted documents appear in a fixed position on the Search results page.

To set up a query promotion

1. In the main navigation on the left of the page, click **Promotions**. Alternatively, start directly from the Search page.

2. Type your search terms in the search box at the top of the page, then press ENTER. The Search results page opens.

   > **TIP:**
   > You can view only documents in a specific language by clicking the arrow next to the Language list, then selecting the language that you require. In addition, you can sort your results either by relevance or by date.

3. Click **Promote query**.

4. Click the type of Spotlight promotion that you want to create, then click **Continue**.

5. On the promotion triggers page, type the words that a user must search for to trigger the promotion, then click **+**. Separate multiple words with spaces. Enclose words that you want to be treated as a phrase in quotation marks (for example, "*burmese cat*"). To remove a term, click **x** next to a term.

6. Click **Finish**.

   IDOL Data Admin creates the promotion, and shows the Search results page with both the results for the terms that you chose to trigger the promotion, and the results for the promoted query. This allows you to test your promotion to make sure it works as expected.

   The documents from your promoted query appear at the top of the results list.

Edit Promotions

The Promotion Details page shows all the information for the selected promotion, including the name and type of the promotion, the documents that are included, the language settings, the query that is being promoted (if applicable), any scheduling details, and the search terms, Field Text and database restrictions that trigger the promotion.

> **TIP:**
> IDOL Data Admin uses the query terms from the search that you used to create the promotion as the name of the promotion. You can change this to better identify promotions. Changing the name does not affect the trigger terms for a promotion.

To edit the name of a promotion

1. Next to the promotion name, click .

2. Type the new name for the promotion.

3. Click .

To change the promotion type for Spotlight promotions

- Click the arrow next to the promotion type at the top of the page, then click the new promotion type.

Spotlight Type

Sponsored ▼

> Hotwire
>
> Top Promotions
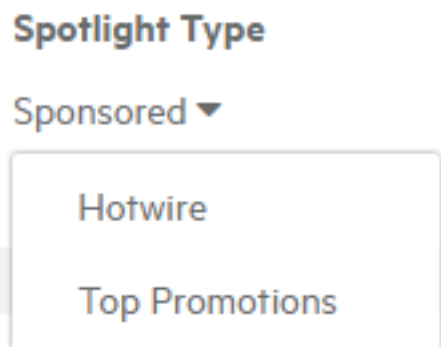
To schedule a promotion

1. Click **Schedule** 🖊. The Schedule your promotion page opens.

2. Click **Schedule** to run your promotion at a specified time, or click **Always active** to run your promotion constantly.

3. Click **Continue**.

4. Click 🗓, then use the calendars to select the start and end dates for your promotion schedule.

5. Click **Continue**.

6. Specify the frequency of promotion. Click **Do not repeat** to run the promotion only once, or click **Repeat with frequency below**, then choose a frequency from the list. You can run a promotion schedule weekly, monthly, or yearly.

7. Click **Continue**.

8. Specify the date on which you want the schedule to finish. Click **Never** to run the schedule indefinitely, or click **Run this promotion schedule until the date below**, then click 🗓 and use the calendar to select the time and date at which the schedule should end.

9. Click **Finish**. IDOL Data Admin schedules the promotion and updates the Promotions Detail page with details of your schedule settings.

To remove search terms that trigger the promotion

- In the **Trigger terms** section of the page, click **x** next to the search term that you want to remove.

> **NOTE:**
> You cannot remove the final trigger term in the list.

The promotion is no longer triggered when a user searches for the term.

To add search terms that trigger the promotion

1. In the **Trigger terms** section of the page, type the new search terms to trigger the promotion. Separate multiple terms with a space. Enclose search terms that you want to be treated as a phrase in quotation marks (for example, "*burmese cat*").

2. Click **+**.

   The promotion is triggered when a user searches for the term that you added.

To modify a search term that triggers the promotion

1. In the **Trigger terms** section of the page, click ✎ next to the search term that you want to modify.

2. Modify the search term.

3. Click ✔ to confirm the change. Press **Esc** or click outside the input box to cancel your change.

   The confirm button (✔) is not available if you clear the input box, or if the new term already exists for the current promotion.

To add documents to a promotion

1. At the top of the list of documents that are included in the promotion, click **Add More**. The Edit Document References page opens.

2. Type the terms that you want to search for in the search field, then press ENTER.

3. On the Search results page, select the check boxes next to the documents that you want to add to the promotion.

4. Click **Save** to update the promotion with the new documents.

To remove documents from a promotion

- In the list of documents that are included in the promotion, click **x** next to the document that you want to remove.

To change the position of a Pin to Position promotion

1. Click ✎ next to the reminder of the current position in the search results.

Position

1 ✎

2. Click **+** and **-** to set the new position at which you want the documents in the promotion to appear.

3. Click [icon]. When a user types search terms that trigger the promotion, the documents will appear in the new position in the results list.

To delete a promotion

1. From the Promotions page, find the promotion in the list.

2. Click 🗑 . The Delete Promotion confirmation dialog box opens.

3. Click **Delete**. IDOL Data Admin removes the promotion from the Promotions main page.

To view the search results for a search term

- In the **Trigger terms** section of the page, click a search term to view the results for that term.

To edit a query that is being promoted

1. Click 🖋 next to the reminder of the query at the top of the list of documents.

Promoting this query:

football 🖋
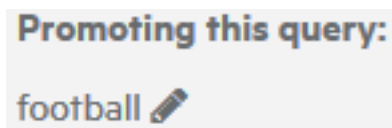
2. Edit the query to apply the promotion to.

3. Click [icon].

For more information on query promotions, see Set Up New Promotions, on page 17.

To add Field Text restrictions as a promotions trigger

1. In the **Field Text** section, click **+ Add FieldText Restriction**.

2. Type the Field Text statement that you want to use as a promotion trigger, then click [icon].

> **CAUTION:**
> You can specify field text for promotions in the DRECONTENT field only. For example, you can set MATCH{apple}:DRECONTENT as a Field Text restriction for a promotion, but not MATCH{apple}:DRETITLE. See Add Field Text Restrictions, on the next page for more information.

To add a database match to a spotlight or dynamic spotlight promotion

1. In the Database Match section, click **+Add Database Match**.

2. In the list, select the databases that you want the promotion to apply to. IDOL applies the promotion to any query that requests documents from at least one of these databases (the user must request the database explicitly).

3. Click ✔ .

Add Field Text Restrictions

You can use the Field Text section on the Search results page to specify fields that result documents must contain, and the conditions that these fields must meet for the documents to return as results (see Set Up New Promotions, on page 17). Alternatively, you can add Field Text restrictions as a promotions trigger from the Promotion Details page (see Edit Promotions, on page 19).

For example:

-   To match documents whose DOCUMENT_TYPE field contains the value *record*:

    ```
    MATCH{record}:DOCUMENT_TYPE
    ```

-   To match documents whose FILETYPE field contains one of the values *pdf*, *doc*, or *txt*:

    ```
    MATCH{pdf,doc,txt}:FILETYPE
    ```

-   To match documents whose DIR or DIRECTORY field exactly matches one of *docs*, *archive*, or *work*:

    ```
    MATCH{docs,archive,work}:DIR:DIRECTORY
    ```

-   To use Boolean operators and parentheses to group FieldText restrictions:

    ```
    MATCH{dog}:ANIMAL+AND+(MATCH{celery}:VEGETABLE+OR+NOT+MATCH{quartz}:MINERAL)
    ```

-   To match documents for which SCORE1 is greater than .95 and SCORE2 is less than .85:

    ```
    GREATER{.95}:SCORE1+AND+LESS{.85}:SCORE2
    ```

-   To match documents that have a COUNT field, regardless of its value:

    ```
    EXISTS{}:COUNT
    ```

-   To match documents whose BRAND field contains *tech* as a substring:

    ```
    STRING{tech}:BRAND
    ```

-   To match documents whose EMOTION field contains a string that has the same stem as the word *loving*.

    ```
    TERM{loving}:EMOTION
    ```

    For example, if the EMOTION field has any of the values *love*, *loving*, *loves*, or *lover*, the document matches.

-   To match documents whose position (stored in the LAT and LONG fields) is within a distance of 5 kilometers from the point with latitude 52.2°N and longitude 0.12° E:

    ```
    DISTSPHERICAL{52.2,0.12,5}:LAT:LONG
    ```

- To match documents whose DUE_DATE is before the current time:

```
LTNOW{}:DUE_DATE
```

For more information on how to set up and use Field Text, see the *IDOL Server Administration Guide*, the *IDOL Server Reference*, and *IDOL Expert*.

Chapter 3: Search

This section describes how to use the search to test your keyword and promotion settings to check that the results are as you would expect, and how to work with your results. You can also use the Search section to search your data for answers to your Answer Bank questions.

Work With Search Results

When you run a search in IDOL Data Admin, the results appear in the central panel of the Results page. The panel on the right of the Search results page offers various ways to filter your results list or control your query parameters.

Filter Results by Database

- To view only documents from a particular database or databases, click the relevant database names in the **Databases** section.

Filter Results by Date

To filter your results by date

- Click , then use the calendars to select the start and end dates for your search.

  The Search results list refreshes to show only results from the date and time that you selected.

To return to your original results list, click **x** next to the filters at the top of the page.

Filter Results by Parametric Values

If your data contains parametric field types, you can filter your search results to include only results that contain a particular parametric value. Click the relevant value in the **Parametric Values** section.

For more information about setting up parametric fields, refer to the *IDOL Server Reference* and the *IDOL Server Administration Guide*.

View Related Concepts

IDOL Data Admin displays a list of concepts related to your current search. To view the results for a search on a related concept, click a link in the list.

Use Field Text

You can use the Field Text section on the Search results page to specify fields that result documents must contain, and the conditions that these fields must meet for the documents to return as results. See Add Field Text Restrictions, on page 23 for more information.

Page Through the Results

You can page through large lists of results by using the paging options. You can click the forward, back, first, and last buttons to page through the results, or click the page number of nearby pages:
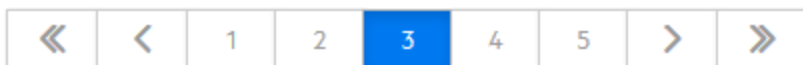
To jump to a page that is not listed, click the current page number (highlighted in blue) and type the number of the page to jump to.

Delete a Result

You can delete a search result from your IDOL index, by clicking the icon beside the result.

Chapter 4: Answer Bank

This section describes how to use the Answer Bank section of IDOL Data Admin to administer a store of reference questions and answers.

Introduction to Answer Bank

You can use the Answer Bank section of IDOL Data Admin to administer a store of question and answer pairs in IDOL Answer Server.

IDOL Answer Server provides several systems for natural language question answering. The Answer Bank system allows you to create and maintain a dynamic FAQ.

When a user asks a question, Answer Server attempts to match it to any existing question/answer pairs in the Answer Bank store, and provides the appropriate stored answer.

You can define your own question/answer pairs, or add user-submitted questions to the system. The Answer Bank interface allows you to easily add and curate the incoming questions. You can also view the questions, and decide whether to add an answer or discard them.

The following sections describe how to use the Answer Bank interface in IDOL Data Admin to maintain your Answer Bank system.

For more information about Answer Server, refer to the *Answer Server Administration Guide* and *Answer Server Reference.*

Answer Bank Concepts

This section describes the main terms and concepts in Answer Bank.

- *Question*. A question is something that has been, or might be, asked by an end user of your system. A question can either be part of an existing question/answer pair, or added to the Answer Bank process, where you can either discard it or add it to a new or existing question/answer pair.

- *Question/Answer Pair*. A question/answer pair (also known as *Q/A pair*) is a self-contained FAQ entry. It consists of a reference question, an answer, and some associated metadata:

  - *Reference Question*. The most appropriate question for the specified answer. This reference question might be displayed to end users, depending on your front end application.

○ *Answer*. The answer to the reference question. The answer is displayed to end users.

○ *Rule*. A query expression that matches end user questions to a particular question/answer pair. When answering questions from end users, the rule is used to find the most appropriate reference question and therefore the best answer.

The rule can use Boolean and proximity operators, and bracketed expressions to specify precedence. The most common operators are AND, OR, NOT, and NEAR.

○ *Equivalent Questions*. A set of alternative questions that are considered equivalent to the reference question. The Answer Bank uses these questions to test the rule.

Example

Your Answer Bank system contains the following questions:

- Why is the sky blue?

- What makes the sky appear blue?

- How does the sky get its blue color?

You combine these questions in a question/answer pair, with the reference question 'Why is the sky blue?'. You include the other two questions as equivalent questions.

You define the rule sky AND blue to match all the variants of the question.

Answer Bank Overview Page

The main Answer Bank overview page enables you to view summary information about the questions and answers in your Answer Bank.

The summary at the top of the page provides details of the numbers of questions in different states (incoming, answerable, needs answer, and answered), and the numbers of incoming answers:

- **Incoming Questions** are the initial input questions that have not been checked. See Manage Incoming Questions, on page 34.

- **Answerable Questions** have been through an initial check and confirmed to be questions that can be answered. See Manage Answerable Questions, on page 36.

- **Needs Answer** refers to questions that are answerable but do not match any existing question/answer pairs. See Manage the Needs Answer List, on page 39.

- **Answer Bank** contains question/answer pairs that have answers and a rule.

- **Incoming Answers** are question/answer pairs that have an answer, but which do not have a rule. See Manage Incoming Answers, on page 41.

The summary is displayed at the top of all the pages in the Answer Bank interface, to allow you to easily navigate between different sections as you work. Click each section to view additional details and tasks.

The main overview page also shows the Popular questions this week list, which displays the top ten most popular answered questions in your Answer Bank system. This table also shows:

- **Popularity this week**. The number of times that a question that matches the rule for this question/answer pair has been asked in the last seven days.

- **Equivalent Questions**. The number of equivalent questions in the question/answer pair.

- **Unmatched Equivalent Questions**. The number of equivalent questions in the question/answer pair that do not match the defined rule.

You can sort the question list by the popularity, and by the number of unmatched equivalent questions, by clicking the column title.

> **TIP:**
> You can use the Search box to specify search terms to find questions that are not listed in the top ten most popular.

Click the title of one of the listed questions to edit the question/answer pair. See Modify or Delete a Question/Answer Pair, on page 33.

You can also use the following buttons to add more questions and answers to your Answer Bank system:

- **Add New Question/Answer Pair**. Add a single new question and answer. See Add Questions to Answer Bank, below.

- **Bulk Import Unanswered Questions**. Add a list of questions. See Import Multiple Questions, on the next page.

- **Bulk Import Answers**. Add a list of question/answer pairs, with optional rules. See Import Multiple Questions with Answers, on page 32.

Add Questions to Answer Bank

There are several ways to add questions to your Answer Bank system, depending on whether you want to add a single question and answer, or if you want to import them in bulk.

Add a Single Question/Answer Pair

You add a single question and answer by using the Edit Question/Answer Pair page.

To add a single question/answer pair

1. On the Answer Bank overview page, click **Add New Question/Answer Pair**.

   The Edit Question/Answer Pair page opens.

2. Type or paste your reference question and answer in the appropriate sections.

   > **TIP:**
   > You can click **Search Corpus** to search your index of documents for possible answers, or click **Search Web** to search the Web (this option is available only if your administrator has enabled it).

You can also optionally use the Answer source box to add some additional metadata, such as an expert's name or the title of the document that the answer came from.

3. In the Rule Development section, add your rule. You can click **Suggest Rule** to automatically generate a rule, which you can modify if required.

   The rule can use Boolean and proximity operators, and bracketed expressions to specify precedence. The most common operators are AND, OR, NOT, and NEAR. You can add a number to the NEAR operator, to specify a required distance. For example, A NEAR5 B means that A must be within five words of B.

   When you add a rule, IDOL Data Admin automatically checks for other questions in your Answer Bank that match the rule. It lists matching questions in the False Positives box.

4. If any of the matching false positives are equivalent to your question, click to move the question into the equivalent questions list.

   If the false positive has the icon , it is already part of a different question/answer pair. In this case, you might want to modify your rule so that it does not match non-equivalent questions.

5. In the Conceptually Similar Questions section, click **Show**.

   This section lists questions that match an IDOL conceptual search with the reference question as query text, and which are not currently assigned to a question/answer pair.

   If any of the conceptually similar questions are equivalent to your question, click to move the question into the equivalent questions list.

6. If you have additional equivalent questions that do not currently exist in Answer Bank, click the New question text box. Type your new question and then click to add it to the list.

   In the equivalent questions list, questions that match your rule have a blue background. Any questions that do not match the rule have a red background. The text at the top of the box specifies how many questions match, out of the total number.

7. Modify the rule until all your equivalent questions match. You can click **Suggest Rule** after you add equivalent questions to generate a new rule.

   > **TIP:**
   >
   > If you decide that a question is not equivalent, you can click to disassociate it from the question/answer pair.

8. When you have finished modifying the question/answer pair, click **Save**. To cancel your changes without saving, you can click **Go Back**.

Import Multiple Questions

You can import multiple unanswered questions in the form of a comma-separated values (CSV) file, with each question on a new line in the file. The file can be a maximum of 1 MB in size.

> **NOTE:**
> If the question contains a comma, enclose the question in double quotation marks (""). If the

> question contains double quotation marks, you must escape the quotation marks by using another double quotation mark.

For example:

```
Does four plus four equal eight?
"Why is it that every time Autumn comes, the leaves change color?"
Who performed the song ""Camelot"" in the 1960 musical of the same name?
```

To import multiple unanswered questions

1. On the Answer Bank overview page, click **Bulk Import Unanswered Questions**.

   The Bulk Import Unanswered Questions dialog box opens.

2. Click the dialog box. Navigate to the location of the CSV file that contains the questions that you want to upload, and then click **Open**.

   > **TIP:**
   > Alternatively, drag the file to the dialog box.

3. Click **Upload**.

   Answer Bank indexes each row in your CSV file as a new question, and adds the questions to the Incoming Questions Queue. See .

4. Click **Close** to close the import dialog box.

Import Multiple Questions with Answers

You can import multiple question/answer pairs in the form of a comma-separated values (CSV) file. The file can be a maximum of 1 MB in size.

Each row represents a separate question and answer pair, with an optional rule. Separate the question, answer, and rule with commas.

> **NOTE:**
> If the question contains a comma, enclose the question in double quotation marks (""). If the question or answer contains a double quotation marks, you must escape the quotation marks by using another double quotation mark.

For example:

```
Does four plus four equal eight?,Yes
"Why is it that every time Autumn comes, the leaves change color?",Because of the
breakdown of chlorophyll,Autumn NEAR leaves NEAR change
Who performed the song ""Camelot"" in the 1960 musical of the same name?,Richard
Burton,performed NEAR Camelot
```

To import multiple question/answer pairs

1. On the Answer Bank Dashboard page, click **Bulk Import Answers**.

   The Bulk Import Answers dialog box opens.

2. Click the dialog box. Navigate to the location of the CSV file that contains the answers that you want to upload, and then click **Open**.

   > **TIP:**
   > Alternatively, drag the file to the dialog box.

3. Click **Upload**.

   Answer Bank indexes each row in your CSV file as a new question/answer pair (including a rule, if specified). If the question/answer pair has a rule, it is immediately available in Answer Bank. If the question/answer pair does not have a rule, Answer Bank adds it to the Incoming Answers page.

4. Click **Close** to close the import dialog box.

Modify or Delete a Question/Answer Pair

The questions in the Answer Bank list belong to a question/answer pair, and have an existing answer and rule. You can click these questions to view the existing information, and modify it if required.

To modify an existing question/answer pair

1. On the Answer Bank overview page, click the question that you want to modify.

   > **TIP:**
   > If the question you want to find is not listed, you can use the Search box to specify search terms to find it.

   The Edit Question/Answer Pair page opens.

2. Modify the reference question, answer, answer source, and rule, as required.

   > **NOTE:**
   > Micro Focus recommends that you modify the reference question only to correct spelling and make minor adjustments. If you want to completely change the question, create a new question/answer pair.

3. Add any new equivalent questions to the question/answer pair from the list of false positives.

   You can also remove equivalent questions from the list by clicking next to the question, or by dragging it into the false positives list.

4. After you finish making your changes, click **Save**.

To delete a question/answer pair

1. On the Answer Bank overview page, click the question that you want to delete.

    The Edit Question/Answer Pair page opens.

2. At the top of the page, click **Delete**.

    The Delete Question/Answer Pair dialog box opens.

3. Click **Delete**.

    The question/answer pair is deleted.

> **NOTE:**
> If the question/answer pair has any equivalent questions, these questions return to the Incoming Questions Queue. See Manage Incoming Questions, below.

Manage Incoming Questions

Incoming questions are questions that have not been checked or answered. The Incoming Questions Queue page allows you to check through and manage the list of questions.

To open the Incoming Questions Queue page, click **Incoming Questions** at the top of any Answer Bank page, or use the side bar to navigate to **Answer Bank > Questions > Incoming**.

The Incoming Questions Queue page lists all the questions currently in the queue, with the time that each question has spent in the queue.

From the Incoming Questions Queue page, you can:

* Filter the list of questions to show only questions that contain a particular phrase. This feature enables you to focus on questions on a specific topic.

* Discard irrelevant questions and remove them permanently from the queue.

* Send a question to the Answerable Questions Queue for further administration.

* Answer individual questions.

Answer Bank shows the number of incoming questions curated during your current session in the bottom right corner of the page.

Navigate the Question Queue

You navigate the incoming question queue by using your mouse or arrow keys. You can click a specific question, or use the up and down arrow keys to move up or down in the list.

To filter the list of questions, type a word or phrase in the **Filter** box, and then press **Enter**. The page refreshes to show only the questions that match your search terms.

> **TIP:**
> You can use Boolean, proximity, and wildcard operators to construct a more precise search.

Manage Questions

You can go through the list and use the left and right arrow keys or UI buttons to move questions:

- Move a question left () to discard it. Discarding the question removes it from the queue and marks it as deleted.

- Move a question right () to mark it as answerable. This moves the question to the Answerable Questions queue. See Manage Answerable Questions, on the next page.

You an also provide answer to a question directly.

To answer a question

1. In the list of questions, select the question that you want to answer and click **Answer Now**.

    The Edit Question/Answer Pair page opens. The reference question section is prepopulated with the question text.

2. Type or paste your answer in the Answer box.

    > **TIP:**
    > You can click **Search Corpus** to search your index of documents for possible answers, or click **Search Web** to search the Web (this option is available only if your administrator has enabled it).

    You can also optionally use the Answer source box to add some additional metadata, such as an expert's name or the title of the document that the answer came from.

3. In the Rule Development section, add your rule. You can click **Suggest Rule** to automatically generate a rule, which you can modify if required.

    The rule can use Boolean and proximity operators, and bracketed expressions to specify precedence. The most common operators are `AND`, `OR`, `NOT`, and `NEAR`. You can add a number to the `NEAR` operator, to specify a required distance. For example, `A NEAR5 B` means that A must be within five words of B.

    When you add a rule, IDOL Data Admin automatically checks for other questions in your Answer Bank that match the rule. It lists matching questions in the False Positives box.

4. If any of the matching false positives are equivalent to your question, click to move the question into the equivalent questions list.

    If the false positive has the icon , it is already part of a different question/answer pair. In this case, you might want to modify your rule so that it does not match non-equivalent questions.

5. In the Conceptually Similar Questions section, click **Show**.

    This section lists questions that match an IDOL conceptual search with the reference question as query text, and which are not currently assigned to a question/answer pair.

If any of the conceptually similar questions are equivalent to your question, click to move the question into the equivalent questions list.

6. If you have additional equivalent questions that do not currently exist in Answer Bank, click the New question text box. Type your new question and then click to add it to the list.

In the equivalent questions list, questions that match your rule have a blue background. Any questions that do not match the rule have a red background. The text at the top of the box specifies how many questions match, out of the total number.

7. Modify the rule until all your equivalent questions match. You can click **Suggest Rule** after you add equivalent questions to generate a new rule.

> **TIP:**
>
> If you decide that a question is not equivalent, you can click to disassociate it from the question/answer pair.

8. When you have finished modifying the question/answer pair, click **Save**. To cancel your changes without saving, you can click **Go Back**.

Manage Answerable Questions

Answerable Questions have been through an initial check and confirmed to be questions that can be answered. The Answerable Questions page allows you to view the list of answerable questions and select questions to answer.

To open the Answerable Questions page, click **Answerable Questions** at the top of any Answer Bank page, or use the side bar to navigate to **Answer Bank > Questions > Answerable**.

The Answerable Questions page lists all the questions that have been marked as answerable. For each question, the page specifies the **Likelihood of an existing answer**. Answer Bank calculates the likelihood (high, medium, or low) according to the number of question/answer pairs that contain similar questions. The table also includes the **Age** of the question (that is, how long it has been in Answer Bank).

When you click an answerable question, the Assign unanswered questions to QEC page opens. You can use this page to

- assign the question (and any equivalent questions) to an existing question/answer pair.

- answer the question.

- move the question to the **Needs Answer** queue to create a new question/answer pair.

- skip or permanently discard the question.

Filter the List of Questions

To filter the list of questions, type a word or phrase in the **Search** box, and then press **Enter**. The page refreshes to show only the questions that match your search terms.

> **TIP:**
> You can use Boolean, proximity, and wildcard operators to construct a more precise search.

Add a Question to an Existing Answer

The Answerable Questions list shows the likelihood that an existing answered question is equivalent to the new question. In this case, you can add the question to the existing question/answer pair, rather than create a duplicate answer.

To assign a question to an existing question/answer pair

1. On the Answerable Questions page, click the question that you want to assign to a question/answer pair.

   The Assign unanswered questions to QEC page opens, with your question in the question box.

2. From the **Include these unanswered questions** list, select any other equivalent questions that you want to assign to the same question/answer pair.

   You can select multiple questions. Selected questions are highlighted with a blue background.

3. From the **Assign to equivalent question** list, select the reference question for the question/answer pair that you want to add the question to.

   You can select only one question/answer pair.

4. Click **Move to Answer Bank**.

   The question is added to the question/answer pair. You can find and view the question/answer pair in the Answer Bank list. See Answer Bank Overview Page, on page 29.

> **TIP:**
> Questions that you move to the Answer Bank are listed in the Processed Questions box. If you assign a question by mistake, click **Return to Queue** to return the question to the answerable questions list.

Add an Answer

When a new answerable question does not match any existing question/answer pairs, you can create a new answer.

To answer a question

1. On the Answerable Questions page, click the question that you want to assign to a question/answer pair.

   The Assign unanswered questions to QEC page opens, with your question in the question box.

2. From the **Include these unanswered questions** list, select any equivalent questions. This option allows you answer multiple equivalent questions in the same question/answer pair.

You can select multiple questions. Selected questions are highlighted with a blue background.

3. Click **Create Answer**.

   The Edit Question/Answer Pair page opens. The reference question section is prepopulated with the question text. The list of equivalent questions is prepopulated with the questions that you selected.

4. Type or paste your answer in the Answer box.

   > **TIP:**
   > You can click **Search Corpus** to search your index of documents for possible answers, or click **Search Web** to search the Web (this option is available only if your administrator has enabled it).

   You can also optionally use the Answer source box to add some additional metadata, such as an expert's name or the title of the document that the answer came from.

5. In the Rule Development section, add your rule. You can click **Suggest Rule** to automatically generate a rule, which you can modify if required.

   The rule can use Boolean and proximity operators, and bracketed expressions to specify precedence. The most common operators are AND, OR, NOT, and NEAR. You can add a number to the NEAR operator, to specify a required distance. For example, A NEAR5 B means that A must be within five words of B.

   When you add a rule, IDOL Data Admin automatically checks for other questions in your Answer Bank that match the rule. It lists matching questions in the False Positives box.

6. If any of the matching false positives are equivalent to your question, click to move the question into the equivalent questions list.

   If the false positive has the icon , it is already part of a different question/answer pair. In this case, you might want to modify your rule so that it does not match non-equivalent questions.

7. In the Conceptually Similar Questions section, click **Show**.

   This section lists questions that match an IDOL conceptual search with the reference question as query text, and which are not currently assigned to a question/answer pair.

   If any of the conceptually similar questions are equivalent to your question, click to move the question into the equivalent questions list.

8. If you have additional equivalent questions that do not currently exist in Answer Bank, click the New question text box. Type your new question and then click to add it to the list.

   In the equivalent questions list, questions that match your rule have a blue background. Any questions that do not match the rule have a red background. The text at the top of the box specifies how many questions match, out of the total number.

9. Modify the rule until all your equivalent questions match. You can click **Suggest Rule** after you add equivalent questions to generate a new rule.

> **TIP:**
>
> If you decide that a question is not equivalent, you can click to disassociate it from the question/answer pair.

10. When you have finished modifying the question/answer pair, click **Save**. To cancel your changes without saving, you can click **Go Back**.

Move a Question to the Needs Answer List

When you do not have an answer to an answerable question, you can move it to the Needs Answer list to research later.

To move a question to the needs answer list

1. On the Answerable Questions page, click the question that you want to move.

   The Assign unanswered questions to QEC page opens, with your question in the question box.

2. Click **To Needs Answer**.

   The question is moved to the Needs Answer list. You can update it and add an answer later. See Manage the Needs Answer List, below.

   > **TIP:**
   > Moved questions are listed in the Processed Questions box. If you move a question by mistake, click **Return to Queue** to return the question to the answerable questions list.

Skip or Discard an Answerable Question

When you click an answerable question, the Assign unanswered questions to QEC page opens.

- To skip the question, click **Skip for Now**.

- To permanently delete the question, click **Discard**.

  > **TIP:**
  > Discarded questions are listed in the Processed Questions box. If you discard a question by mistake, click **Return to Queue** to return the question to the answerable questions list.

Manage the Needs Answer List

Needs Answer refers to questions that are answerable but do not match any existing question/answer pairs. The Needs Answer page allows you to view these questions and add answers.

To open the Needs Answer page, click **Needs Answer** at the top of any Answer Bank page, or use the side bar to navigate to **Answer Bank > Questions > Needs Answer**.

The Needs Answer page lists all the questions that have been marked as needing an answer, for example because they are answerable but the answer was not available. For each question, the page specifies the **Likelihood of an existing answer**. Answer Bank calculates the likelihood (high, medium, or low) according to the number of question/answer pairs that contain similar questions. The table also includes the **Age** of the question (that is, how long it has been in Answer Bank).

You can use the Needs Answer list of questions to find sets of equivalent questions, and create question/answer pairs.

Filter the List of Questions

To filter the list of questions, type a word or phrase in the **Search** box, and then press **Enter**. The page refreshes to show only the questions that match your search terms.

> **TIP:**
> You can use Boolean, proximity, and wildcard operators to construct a more precise search.

Answer a Question

Use the following procedure to answer a question.

To answer a question

1. In the list of questions, click the question that you want to answer.

    The Edit Question/Answer Pair page opens. The reference question section is prepopulated with the question text.

2. Type or paste your answer in the Answer box.

    > **TIP:**
    > You can click **Search Corpus** to search your index of documents for possible answers, or click **Search Web** to search the Web (this option is available only if your administrator has enabled it).

    You can also optionally use the Answer source box to add some additional metadata, such as an expert's name or the title of the document that the answer came from.

3. In the Rule Development section, add your rule. You can click **Suggest Rule** to automatically generate a rule, which you can modify if required.

    The rule can use Boolean and proximity operators, and bracketed expressions to specify precedence. The most common operators are AND, OR, NOT, and NEAR. You can add a number to the NEAR operator, to specify a required distance. For example, A NEAR5 B means that A must be within five words of B.

    When you add a rule, IDOL Data Admin automatically checks for other questions in your Answer Bank that match the rule. It lists matching questions in the False Positives box.

4. If any of the matching false positives are equivalent to your question, click to move the

question into the equivalent questions list.

If the false positive has the icon ⊘ , it is already part of a different question/answer pair. In this case, you might want to modify your rule so that it does not match non-equivalent questions.

5. In the Conceptually Similar Questions section, click **Show**.

    This section lists questions that match an IDOL conceptual search with the reference question as query text, and which are not currently assigned to a question/answer pair.

    If any of the conceptually similar questions are equivalent to your question, click ◔ to move the question into the equivalent questions list.

6. If you have additional equivalent questions that do not currently exist in Answer Bank, click the New question text box. Type your new question and then click ⊞ to add it to the list.

    In the equivalent questions list, questions that match your rule have a blue background. Any questions that do not match the rule have a red background. The text at the top of the box specifies how many questions match, out of the total number.

7. Modify the rule until all your equivalent questions match. You can click **Suggest Rule** after you add equivalent questions to generate a new rule.

    > **TIP:**
    >
    > If you decide that a question is not equivalent, you can click ⚡ to disassociate it from the question/answer pair.

8. When you have finished modifying the question/answer pair, click **Save**. To cancel your changes without saving, you can click **Go Back**.

Delete a Question

In the Needs Answer list, you can delete a question by clicking the icon 🗑 next to the question.

Manage Incoming Answers

Incoming answers are answers that are associated with a question, but which do not have a rule. The Incoming Q/A pairs page allows you to view and manage the list of questions that have an answer but no rule.

To open the Incoming Q/A pairs page, click **Incoming Answers** at the top of any Answer Bank page, or use the side bar to navigate to **Answer Bank > Answers > Incoming**.

The Incoming Q/A pairs page lists all the questions that have an answer but no rule, with the time that each question has spent in the queue.

Filter the List of Questions

To filter the list of questions, type a word or phrase in the **Search** box, and then press **Enter**. The page refreshes to show only the questions that match your search terms.

> **TIP:**
> You can use Boolean, proximity, and wildcard operators to construct a more precise search.

Add a Rule to a Question

You must create a rule to add a question/answer pair to the list of active Answer Bank questions.

To add a rule to a question/answer pair

1. In the list of questions, click the question that you want to add a rule to.

   The Edit Question/Answer Pair page opens. The reference question and answer sections are prepopulated with the question and answer.

2. Modify the question or answer, if required.

   > **TIP:**
   > You can click **Search Corpus** to search your index of documents for possible answers, or click **Search Web** to search the Web (this option is available only if your administrator has enabled it).

   You can also optionally use the Answer source box to add some additional metadata, such as an expert's name or the title of the document that the answer came from.

3. In the Rule Development section, add your rule. You can click **Suggest Rule** to automatically generate a rule, which you can modify if required.

   The rule can use Boolean and proximity operators, and bracketed expressions to specify precedence. The most common operators are AND, OR, NOT, and NEAR. You can add a number to the NEAR operator, to specify a required distance. For example, A NEAR5 B means that A must be within five words of B.

   When you add a rule, IDOL Data Admin automatically checks for other questions in your Answer Bank that match the rule. It lists matching questions in the False Positives box.

4. If any of the matching false positives are equivalent to your question, click 🔵 to move the question into the equivalent questions list.

   If the false positive has the icon ⊘, it is already part of a different question/answer pair. In this case, you might want to modify your rule so that it does not match non-equivalent questions.

5. In the Conceptually Similar Questions section, click **Show**.

This section lists questions that match an IDOL conceptual search with the reference question as query text, and which are not currently assigned to a question/answer pair.

If any of the conceptually similar questions are equivalent to your question, click ◀ to move the question into the equivalent questions list.

6. If you have additional equivalent questions that do not currently exist in Answer Bank, click the New question text box. Type your new question and then click ➕ to add it to the list.

   In the equivalent questions list, questions that match your rule have a blue background. Any questions that do not match the rule have a red background. The text at the top of the box specifies how many questions match, out of the total number.

7. Modify the rule until all your equivalent questions match. You can click **Suggest Rule** after you add equivalent questions to generate a new rule.

   > **TIP:**
   >
   > If you decide that a question is not equivalent, you can click 🔗 to disassociate it from the question/answer pair.

8. When you have finished modifying the question/answer pair, click **Save**. To cancel your changes without saving, you can click **Go Back**.

After you save the question/answer pair with a rule, the question is added to the Answer Bank.

Delete a Question/Answer Pair

You can delete an incoming answer if you do not want to add it to the Answer Bank.

To delete an incoming question/answer pair

1. On the Answer Bank overview page, click the question that you want to delete.

   The Edit Question/Answer Pair page opens.

2. At the top of the page, click **Delete**.

   The Delete Question/Answer Pair dialog box opens.

3. Click **Delete**.

   The question/answer pair is deleted.

Send documentation feedback

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on User Guide (Micro Focus IDOL Data Admin 12.2)

Add your feedback to the email and click **Send**.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to swpdl.idoldocsfeedback@microfocus.com.

We appreciate your feedback!