



AMERICAN LEGAL
Publishing Corporation

Quick Reference Guide to Folio 4

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American Legal Publishing – Folio 4 Quick Reference Guide

Welcome to the Folio 4 Quick Reference Guide! This quick reference booklet will acquaint you with the basic functions of Folio Views. The booklet is not comprehensive; it is simply intended to show you the software's major features. For detailed information on any of the features mentioned in this booklet, please open the *Help Infobase* (foliohlp.nfo) or the *Folio 4 Getting Started Infobase* (getstrt.nfo).

The complete *Help Infobase* is available from all windows, dialog boxes and menus in Folio Views. Simply press F1 when the cursor is in any window, while any dialog box is open, or while any menu item is highlighted.

Installation

Step 1: Insert the CD-ROM into the appropriate drive.

Step 2: The installation process will begin automatically.

- *If the installation process does not begin automatically* -- Launch the **Start** button, choose **Run** and type D:\SETUP.EXE.

Step 3: Follow the instructions as they appear on the screen.

Opening an Infobase

Click on the **desktop icon** OR click the **Start** button, choose **Programs**, and select your infobase from the menu.

Searching

Step 1: Choose **Advanced Query** from the **Search** menu.

- You can also access the **Advanced Query** dialog by pressing F2 on the keyboard or clicking the **Query** tool on the **Search** toolbar.

Step 2: Type in the word or words you wish to find. You can also:

- Enclosing a phrase in quotation marks to search for an exact phrase,
- Use the *and*, *or*, and *not* operators to limit or expand your search,
- Click on the right bracket button to search in a highlighter, note, or level.

Step 3: Choose **OK**.

Step 4: Use the **Next Hit** and **Previous Hit** buttons to view search matches (hits) throughout the infobase.

- Use the **Next Hit** button on the **Search** toolbar (or press F4) to move forward one hit at a time.
- Use the **Previous Hit** button (or press SHIFT-F4) to move backward one hit at a time.

Step 5: To begin a new search, choose **Clear Query** from the **Search** menu, and repeat steps (1) through (4) above.

- You can also use the **Go Back** button on the toolbar to return to the point in the infobase where you initiated the search.

Table of Contents Pane

The Table of Contents pane is displayed when the *All*, *Browse*, or *Contents* views are selected. It is a valuable tool for quickly moving around an infobase. It is expandable and collapsible, so you can see as much or as little information as you need. A plus sign (+) next to an entry indicates that the entry can be expanded to show subordinate levels. A minus sign (B) indicates that the entry cannot be expanded further, but may be collapsed.

To use the Table of Contents pane:

- Step 1:** Click on a plus sign (+) to expand a branch of the table of contents.
- Step 2:** Click a minus sign (B) to collapse a branch of the table of contents.
- Step 3:** Double-click on a heading to jump directly to that location in the document.

Following Hypertext Links

Hypertext links connect related pieces of information within the code. Links are identified in an infobase by underlined colored text. There are two basic types of links in your infobase:

- **Jump links** connect you to another point in the infobase and are often used for cross references.
- **Web links** connect you to a web site using your web browser.

To activate or follow a link:

- Step 1:** Move the mouse cursor over the link.
 - The cursor becomes a small hand.
- Step 2:** Single-click or press CTRL-ENTER.

Creating Shadow Files

A shadow file stores personal changes that you would like to make to an infobase. Much like an *overlay* or *transparency* allows you to annotate information without changing an original printed document, a shadow file allows you to add notes or change the appearance of information in a personal view of an infobase without affecting the original master infobase. When you create a shadow file, you create an overlay of an infobase for your personal use.

Remember, when you add notes, highlighters, or bookmarks to the shadow file, they do not appear in the original infobase (the master). So, any change you make to the shadow file only appears in the shadow file.

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To create a new shadow file:

Step 1: Open the infobase to be shadowed.

Step 2: Choose **New** from the **File** menu.

Step 3: Select **Folio Shadow File** from the **File Type** list.

Step 4: Select **File Name** and enter a name for the shadow file.

- The name may be the same as the original infobase provided you use the .SDW extension.
- If necessary, specify the drive or folder where the new file should be created.

Step 5: Choose **OK**.

To open an existing shadow file:

Step 1: Choose **Open** from the **File** menu.

Step 2: Locate the shadow file you wish to open (Shadow files have an .SDW extension).

Step 3: Double-click on the file name.

Creating and Applying Highlighters

Highlighters are used in an infobase in a similar way that highlighter pens are used on written documents. You can customize highlighters by changing colors and other character attributes, such as font or bold.

To create and use a highlighter:

Step 1: Select a block of text.

Step 2: Choose **Highlighter** from the **Tools** menu (or select the **Highlighter** button from the toolbar).

Step 3: Select **New** and create a name for the highlighter.

Step 4: Choose **Format** to change the appearance of the highlighter.

- For example, you can change the font, point size, or the background color.

Step 5: Choose **Apply** to apply the highlighter to the text.

Creating and Accessing Notes

Notes are used in an infobase in the same way that “sticky” notes are used to mark written materials. Notes can contain comments, questions, graphics, or objects. A small icon at the beginning of a record or paragraph indicates that a note is attached. Note boxes can be sized and placed anywhere on the document window. When you save a note and reopen it later, the note will open in the exact size and position in which it was saved.

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To create a note:

- Step 1:** Move the cursor to the record where you want to attach the note.
- Step 2:** Choose **Note** from the **Tools** menu (or select the **Note** button from the toolbar).
- Step 3:** Type the text you wish to include in the note.
- Step 4:** When you are finished, close the note.
- Step 5:** Choose **Yes** to save the note or **No** not to save it.
- Step 6:** Double-click on the note icon to open the note.

Creating and Accessing Bookmarks

Bookmarks in Folio work like regular bookmarks – you place them at often-used or important locations in a document to mark your place. Bookmarks are invisible and you can have an unlimited number in each infobase. When you no longer need a bookmark, you can remove it at any time.

To create a bookmark:

- Step 1:** Move the cursor to a location in the infobase you wish to mark.
- Step 2:** Choose **Bookmark** from the **Tools** menu (or select the **Bookmark** button from the toolbar).
- Step 3:** Give the bookmark a meaningful name and choose **Set**.
- Step 4:** When you need to access that location, click the **Bookmark** button, then double-click the name of the bookmark you wish to visit.
- Step 5:** To delete a bookmark, choose **Bookmark** from the **Tools** menu and select the name of the bookmark you wish to delete and select **Delete**.

Printing

To print:

- Step 1:** Select the information you wish to print. The two most common ways are to:
 - Select the text in the infobase, or
 - Select the sections in the Table of Contents pane that you wish to print.
- Step 2:** Choose **Print** from the **File** menu (or select the **Print** button from the toolbar).
- Step 3:** In the Print Dialog Box, verify your print settings and choose **OK**.

Query Syntax Summary

Operator or Scope	Example
And	one two one & two one and two
Or	me you me or you
Not	^him not him her ^ him
Phrase	"to be or not"
Single Character Wildcard	woman wom?n
Multiple Character Wildcard	work* h*t*
Ordered Proximity	"united states of America"/10
Unordered Proximity	"uncle sams army"@7
Stem (Word Form)	run% great%
Thesaurus (Synonym)	flying\$ alteration\$

Additional Help

If you need additional help, please press **F1** to open the online Folio Views *Help Infobase*. For technical support, contact:

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