

Folio Help PDF

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What is Folio Views?

The PEP CD Archive consists of the journal text and graphics, rekeyed into XML, and then processed into an information database (infobase). The search engine you use to access that infobase is a commercial application called Folio Views.

Folio Views is the premier information database (infobase) application (InfoApp) developed by *NextPage* Corporation. This application enables organizations and information publishers to provide accurate, timely information to their users in a searchable, personalizable format -- the Folio® infobase. Things such as collaborating on a common document, adding information in real-time to keep updated customer support records, adding and storing personal annotations or adding links and multimedia objects to your information are all made possible with *Folio Views*. These features, unique to Folio Infobase Technology, provide organizations that depend on information a significant competitive advantage and provide publishers who disseminate information a robust platform for distribution.

► Understanding the Default Views

A view is a way of looking at information. Depending on what you are doing in an infobase, you may need to look at the information in different ways. To facilitate this, *Folio Views* provides six different views of an infobase.

Each view contains one or more panes. Each pane presents a type of infobase data. The **Document** pane displays the body of the infobase -- the text, objects, links, highlighters, and other data stored in an infobase. The **Contents** pane displays a dynamic table of contents (bibliography) for the infobase. The **Ranking** pane displays search results after a query is performed. The **Title or Reference Window** pane is always connected to the top of the Document pane -- it displays the path to the current information (such as Volume 1-Biology, Chapter 12, The Life Cycle of Amphibians).

The default views are all listed on tabs at the bottom of the infobase window. To change the view of an infobase, click on a tab.

The six views are:

All	Displays the Bibliography, Document, Reference Window, and Ranked List panes. Use this view when searching the infobase or when you need to see all of the related information at once.
Search	Displays the Document and Ranked List window panes. Use

	this view when you are searching to find the most relevant information. (The Ranked List can help you identify the most relevant sections in the infobase to begin reading once your search is completed.)
Browse	Displays the Bibliography, Document, and Reference Window panes. Use this view when you are browsing the infobase for information: it gives you the best access to the Bibliography References while maximizing the space allocated for the infobase text.
Document	Displays Document and Reference Window panes. Use this view when you need as much of the body of the infobase on the screen as possible.
Bibliography	Displays only the Bibliography pane. Use this view when you are navigating or scanning the table of contents and need to see the full name of the headings in the Bibliography (Double-clicking on a heading in the Bibliography view takes you to the appropriate section in the Document view.)
Ranking	Displays only the Ranked List pane. Use this view after performing a search to view as many references in the hit list as possible. (Double-clicking on a reference in the Ranked List takes you to the appropriate section in the Document view.)
Graphic	It shows the last zoomed graphic

Following Links

Links are "hot zones" usually colored text that take you to or display related information. When you activate a link, you are taken to the related information.

Links are provided by infobase publishers, such as PEP, to help you find key information quickly. Links are often used at the beginning of an infobase to take you to major sections in the infobase and within the infobase as cross references to related sections.

Anything in an infobase may be a link. Usually, links are colored and underlined text or a graphical button. To see if an area of text or a graphic is a link, move the mouse over it. When the mouse is over a link, the cursor changes to a small hand -- To follow a link, click the link or press Ctrl+ENTER. To return from a followed link, choose Go Back from the Search menu. Otherwise, press ESC or choose Close from the File menu (the way you return from a link depends on the type of link you have followed).

As an infobase user, you may create your own links within an infobase. For more information on creating and using links, see Study Aids in the Index or look up the reference to links in the *Folio Views* Help database (by pressing F1 when in Folio Views.)

▶ Searching for Information

If you know what you are looking for in an infobase, the fastest way to find it is by searching for it. The greatest strength of an infobase is its searchability. Every word in an infobase is indexed for rapid retrieval and you can generally find what you are looking for as fast as you can type a few keywords.

There are many ways to search for information in an infobase. The method you choose will depend on the amount of control you want to have over the search and how broad you wish the search to be.

The simplest search uses the Query dialog. Using custom query templates provided with an infobase is a close second. The most control over a search is provided through the Advanced Query dialog. For more information, refer to the appropriate section in Folio Views Help (by pressing F1 in *Views*).

▶ Query or Search

The Query dialog allows you to use natural language to search for terms. You do not need to know any query syntax, you simply need to know what you want to find. As an added benefit, the information located by the query is ranked in the Ranking (Ranked List) pane: the most relevant information is listed first, the least relevant information is listed last. Double-click on a heading in the Ranked List to go directly to the information in the infobase.

▶ Browsing for Information

Use the personalization tools to help you remember and find key pieces of information and to annotate the infobase when necessary. The personalization tools include Notes, Highlighters, and Bookmarks.

Notes allow you to place comments about a paragraph or section of the infobase in the margin of the infobase. Notes appear as small "sticky note" icons in the left margin (double-clicking a note opens it for reading or editing). New notes may be added to any paragraph in an infobase.

Highlighters allow you to mark passages in the infobase you want to remember. Just as you may have used a highlight pen in school to mark up your books, so can you use an electronic highlighter to mark up infobases. Electronic highlighters, however, have several distinct advantages over their paper-based counterparts: they may be named for easy reference, searched to find specific information you have marked, and formatted with any of the standard character attributes available in an infobase (including foreground and background colors, fonts, and effects).

Bookmarks allow you to pinpoint locations in an infobase you may want to return to later. Like highlighters, bookmarks may be named for easy reference; they may also be moved from place to place in the infobase. Because they are unobtrusive, you may have as many bookmarks in an infobase as you need.

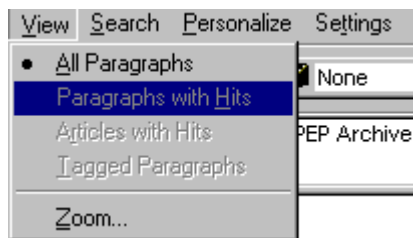
For additional information please refer to the appropriate section in the reference on Bookmarks Highlighters and Notes in *Folio Views Help*.



What to *Do* and *Not Do* when first using Folio Views

There are many ways in which you can customize the way *Folio Views* works for you. Details are given in *Folio Help* - accessed by pressing F1 when running *Folio Views*.

 *Don't:*

- Attempt to start PEP program except by using Start -->Programs--> PEP ArchiveCD1v3 or from a desktop icon. Make sure you use by correct version of PEP by eliminating all previous versions.
- Attempt to do any customization and changing of your settings menu, until you have understood the implications.



Specifically, do not at this stage attempt to use the menu items accessed from the View Menu or the *S*ettings Menu on the Menu Bar or the   icons.

The icons     are for use in association with Study Aids.

- Place a check or tick in any of the boxes marked "Checked branches" until you have understood the implications.

Folio designed the Checked Branches and Print By Section features to interact, so that you can quickly print any articles you check in the Bibliography pane. Unfortunately, when you check articles (sections) in the Print dialog, this also carries back to the bibliography.

The problem is that even if you are not using the Checked Branches feature for searching, once you print a specific article using this feature, it is still carried over to the

bibliography list. And the search dialogs and the ranked search area of the search toolbar automatically limit the search to the selected articles whenever any checked branches exist.


Compounding the issue, there is a bug (part of Folio Views) in the refresh of the bibliography list when you return from the print dialog, such that the changes to checked branches in the print dialog are not reflected in the bibliography pane. That means that after returning from the Print dialog, you won't see the checked articles (branches), but they will actually be in effect for your next search, unless you clear them search.

This is how to overcome this problem if you have used checked branches and want to escape its grip:

Any time you print using checked sections, when you return to the main window, you must CLEAR your selections using the Edit menu option "Clear All Checks" (or right click on the Bibliography pane of any tab and select "Clear All Checks")

 *Do:*

Say "Yes" when you are asked to save the file when exiting from *Folio Views* if you have added any bookmarks, notes, or highlights.

Occasionally click the "Save"  icon. This saves your settings, search lists, notes, highlighters, etc. (You do not need to save the basic information on CD-ROM, which is permanent)

Using the Folio Views Help System

Folio Views has its own excellent and comprehensive help documentation this can only be accessed through using the *Folio Views* program so in order to be able to use it, you must first become familiar with using the program, hence the PEP-Help Manual.

If you have read the PEP-Help Manual, worked through some of our tutorials and become familiar with the program then you are ready to use the Folio Help documentation. Depending on the type of installation process, the PEP-Help documentation will be available on hard disc drive, if you did a full install, on the CD if you did a partial install, and on your Network server if you are a network user.

Accessing Help


Once you have *Folio Views* running there are four primary methods for accessing Folio Help:

1. Press F1. Help on the current dialog or menu item appears. Use this method for quick help on a specific item or to open Help before performing a search.
2. Choose Contents from the Help menu. The contents listing for Help appears. Use this method to browse for the information you need.
3. Choose "How Do I?" from the Help menu. The "How Do I?" list appears. Use this method when you want a topical listing of tasks that you can perform in Folio Views.
4. Open the FOLIOHLP.NFO infobase in Folio Views. Click on the Contents button to go to the contents listing, search this infobase using the query templates, or browse the infobase using the Contents pane. Use this method when you want to take full advantage of the Folio Views interface while using the help file.

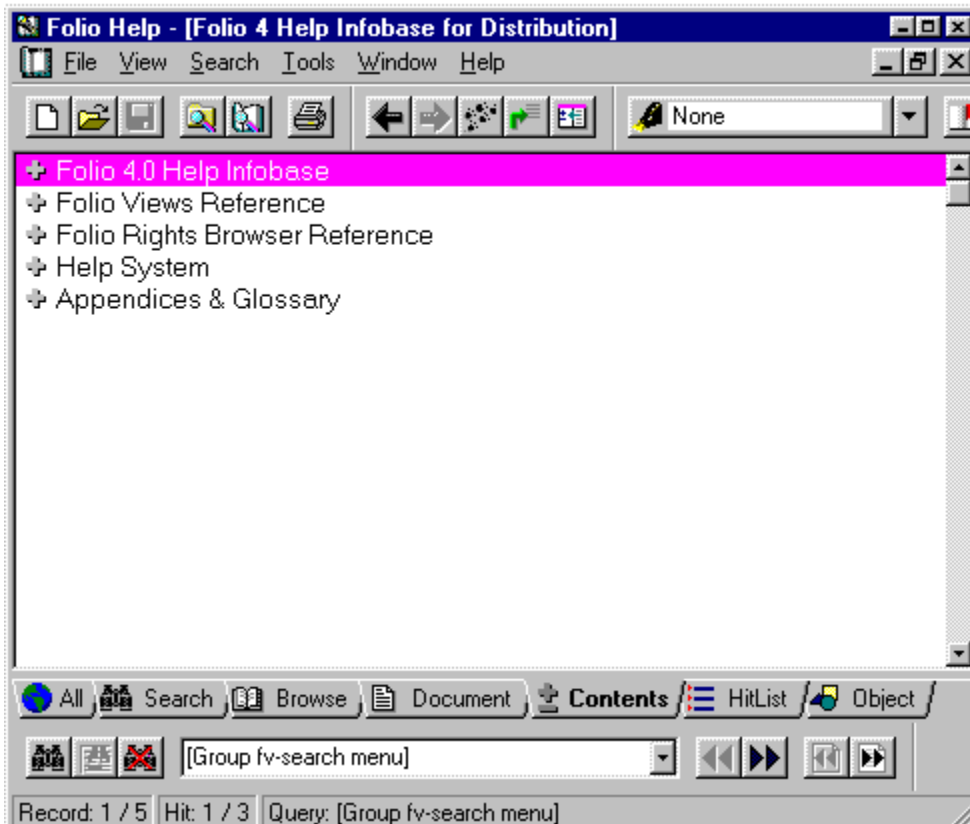
What to do Next

Here are a number of steps to help you use the Folio Help infobase.

After you have pressed F1, maximize the Folio Help window by clicking on the maximize button  on the Folio Help Title bar.

Maximize the Folio 4 Infobase window by clicking on the maximize button  on the Folio Help window Title bar.

Click on the  **Contents** Tab. Your screen will look like this



Double-click on the top title : Folio 4.2 Help Infobase.

Click on a topic or scroll through the text

To close Help, choose Exit from the File menu. Folio Help will close; Folio Views will remain open.

 Finding a Topic In Help

The Help infobase is organised to help you find information several different ways.

- Use the *Contents List* for a high-level overview of the infobase. Follow the links in the Contents list to topics that you need assistance on.
- Use the *Application Overviews* (available from the Contents list) to quickly review the purpose and primary options of any of the included applications (such as Folio Views).
- Use the *How Do I* list to locate information on common tasks that you may perform in Folio Views. The How Do I list is organised topically, with tasks listed beneath the topics.
- Use the *Contents* pane to locate specific information on all standard menu items. Expand the heading for an item (such as the Folio Views reference) by double-clicking on the to show additional information. When you locate the information you need, double-click the heading in the table of contents to go there. View the Contents pane by choosing the Browse tab or the Contents tab at the bottom of the window.

Use the *PEP customized dialogs* easily accessed by selecting the following icons:



With these different custom templates, you can have alternative ways of searching the infobase and focus on the information you need. The PEP custom dialogs are located on the Toolbar at the top of your screen. .

- Use the *Query dialog* to search the infobase. This dialog allows you to enter natural-language style queries without understanding the Folio Views query syntax. It has the added benefit of ranking the information that it finds in the Hit List pane (choose the All tab or the Hit List tab at the bottom of the window to view the Hit List). Choose Query from the Search menu to access this dialog.
- Use the *Advanced Query dialog* to search the infobase. This dialog provides the most freedom in how you construct your searches, but requires that you understand the Folio Views query syntax. Choose Advanced Query from the Search menu to access this dialog.

Press **B** to return to previous text or Topic

Press **C** for Contents