
Carswell's Folio 4 User Guide

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Assumptions:

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While this manual is designed primarily as a research tool, it assumes that the user has some basic understanding of computers and computer terms. It is also assumed that the user is using a computer that is equipped with Windows 95/98/NT/ME/2000/XP. (Please note that Folio 4.3 is not available for the Macintosh platform).

Technical Support:

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Toronto / International: **416-609-3800**
Elsewhere in North America: **1-800-387-5164**
E-mail: [**carswell.techsupport@thomson.com**](mailto:carswell.techsupport@thomson.com)

Support hours:

Monday - Friday 8 AM to 8 PM across Canada
Saturday - Sunday 9 AM to 5 PM across all time zones

Research Support:

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Toronto / International: **416-609-3800**
Elsewhere in North America: **1-800-387-5164**
E-mail: [**carswell.researchsupport@thomson.com**](mailto:carswell.researchsupport@thomson.com)

Support hours:

Monday - Friday 8 AM to 8 PM across Canada
Saturday - Sunday 9 AM to 5 PM across all time zones

Training:

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We will be happy to offer you a number of training options.

Toronto / International: **416-609-3800**
Elsewhere in North America: **1-800-387-5164**
E-mail: [**carswell.train@thomson.com**](mailto:carswell.train@thomson.com)

Launching the Program:

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You have two choices to open the application:

- You may double-click on the icon that was created on your desktop.
- A program group was created on your start menu:
Click Start -> Programs -> [CD-ROM Title] -> [Title of Infobase]

Launching Multiple Disk products:

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If you have subscribed to a CD-ROM service that contains multiple discs (e.g., TaxPartner, Criminal Law Partner), you will note that only one icon was created on your desktop. By default, this icon will open Disk One. We have not provided Desktop icons for subsequent Disks for the sake of not adding too much clutter to your desktop. To access the other disks beyond Disk One, you must go to the links in your start menu.

Searching Across Multiple Infobases:

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If you are running searches on multiple disk products from your CD-ROM drive, you will be required to switch the CD-ROM in your drive. It is not possible to have infobases on two different disks open at the same time if you are reading them from the CD-ROM.

If, however, you are accessing the infobases from a network or your hard drive, then you may have infobases open from different disks and you may perform a single search across all open infobases. Note that the second disk's infobases will open in a separate window. This is the default and you may still search all infobases even if they are in separate windows. To search across all infobases, go to any template and once you have entered your search terms, click on the **Apply to All** button.

Screen Elements and Layout:
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NEW IN FOLIO 4

Many of Carswell's Folio Infobases are linked with an associated Find infobase that contains cross-references and topical indexes. Previously, the Find infobase had to be opened separately or by clicking on a link. Now, it opens up automatically at the same time as the Text infobase. The Text infobase, where all the information documents reside, will always open on the left with the Find infobase on the right

Note: If you are not planning to use the Find infobase, simply maximize the Text Infobase so that it fills the Application window. When you click on a link to the Find infobase, it will automatically reappear.

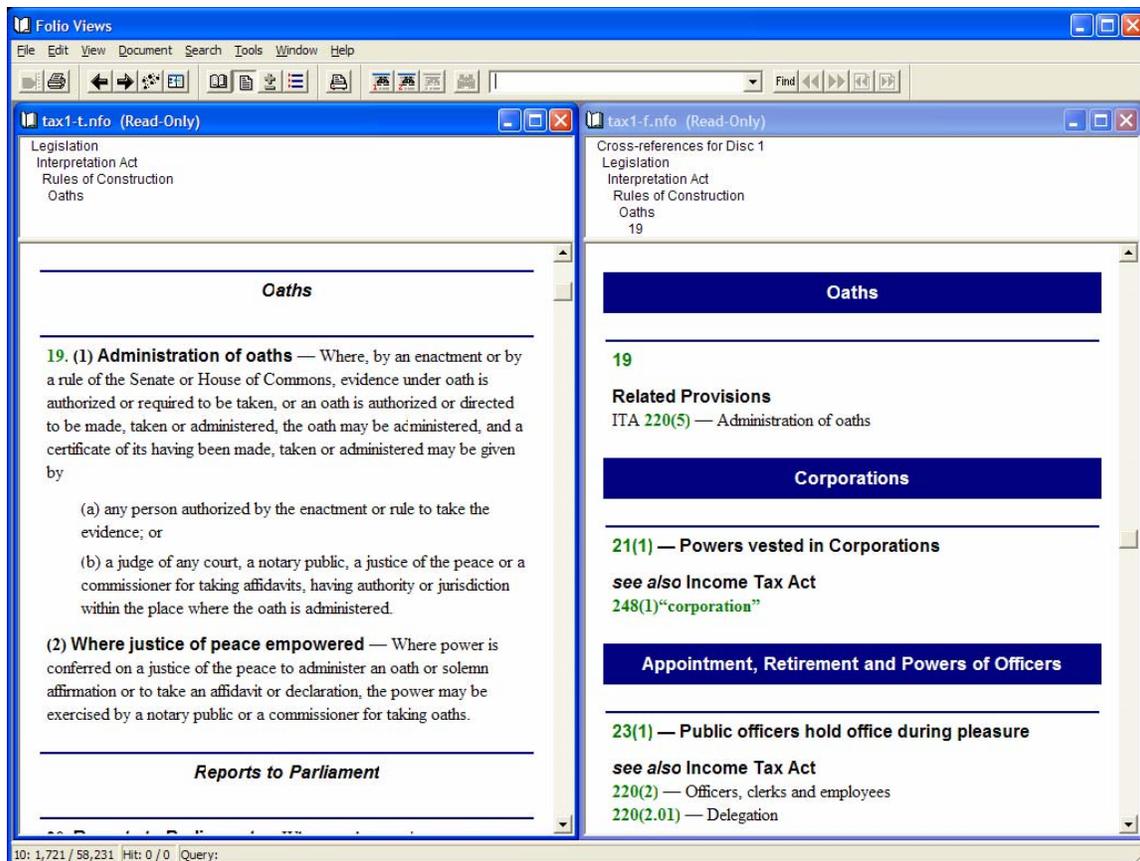


Figure 1: Default screen layout with the Text infobase on the left and the associated Finder infobase on the right.

The Table of Contents is probably the most significantly enhanced portion of Folio 4. Note the following:

- You can open or close the branches with a single click. Double click directly on the text to go to the document.
- Note the small boxes beside each level. Putting a check in the box allows you to do a number of things. For example, you can restrict a search to just the checked branches or you can select documents for batch printing.
- Unlike Folio 3.x, the table of contents is part of the same window as the text in the associated infobase. You “turn on” the table of contents by selecting the appropriate view. See the discussion below on the various toolbar buttons. See also the discussion of the View menu on how to open the table of contents to a specific level (in Folio 3.x, this was accomplished with the Ribbon).
- If you prefer just to see the heading with hits, go to the **Tools** menu and select *Options*. Then go to the Contents tab and put a checkmark beside “Headings with hits”.

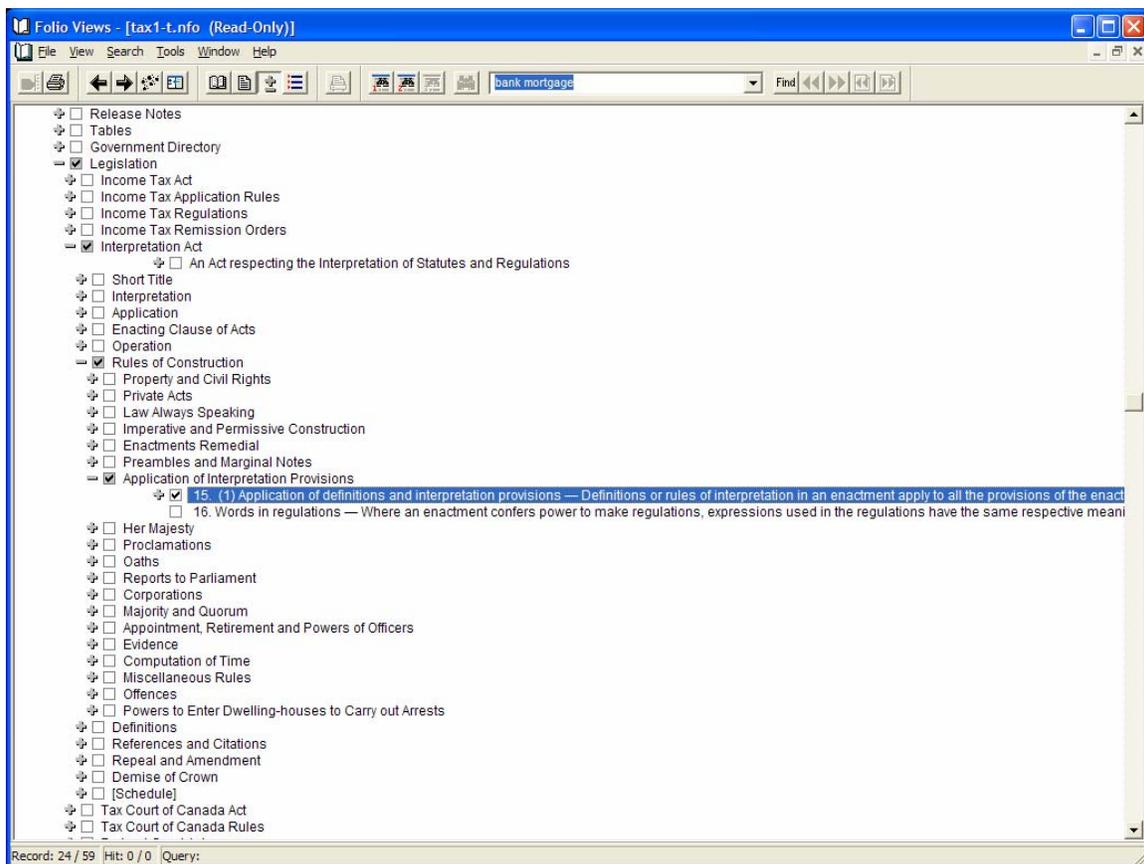
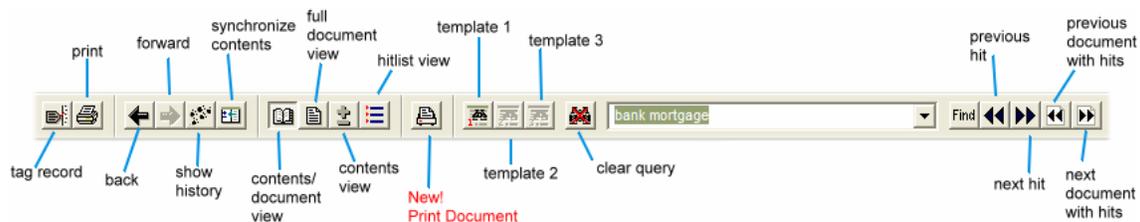


Figure 2: Note that certain checkboxes in the example below have a gray background. That indicates that branches below that level are checked, but that the entire branch has not been selected.

TIP: To quickly clear all the checkboxes, make sure the cursor is in the table of contents and select the View menu. Click on "Clear all checks".

The Toolbar:
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Toolbar buttons are available to duplicate some of the common menu items more quickly. Below is some detailed information for each button function.



A Note about Screen Resolution:
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It is possible that you might not be able to see all the items on the toolbar. If you are using a low screen resolution, the buttons on the far right might get cut off. You have two options:

Adjust your screen resolution.

- Right click on your desktop and select **Properties** from the resulting dialog box. Select the **Settings** tab and increase the resolution. **1024X768** will enable you to see the entire toolbar easily.

Customize the toolbar

- The toolbar is actually divided into different segments. You can therefore split the toolbar into two tiers. It is possible to move the segment that is partially off the screen by clicking on it (click on the background and not on any of the buttons) and dragging it off the toolbar and moving it to a place where it may be visible. Note that while you are dragging, the outline of the segment is a fat rectangle. When you move it close to the toolbar, it will change to a thin rectangle to indicate that it will join the toolbar at that point. If done correctly, it will form a second tier just below the other buttons.
- You can also remove the buttons you do not use so that you can create more space. Simply drag off the buttons you do not require.

Toolbar Buttons:
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Tag Record – Inserts a tag beside the record in which the cursor is currently placed.

Toggle switch: To remove tag, click this button again.



Print – Opens the Print dialog box giving you several options for printing the document. You can print the current record, the current selection (if you've highlighted some text with your mouse), or you could print an entire section.

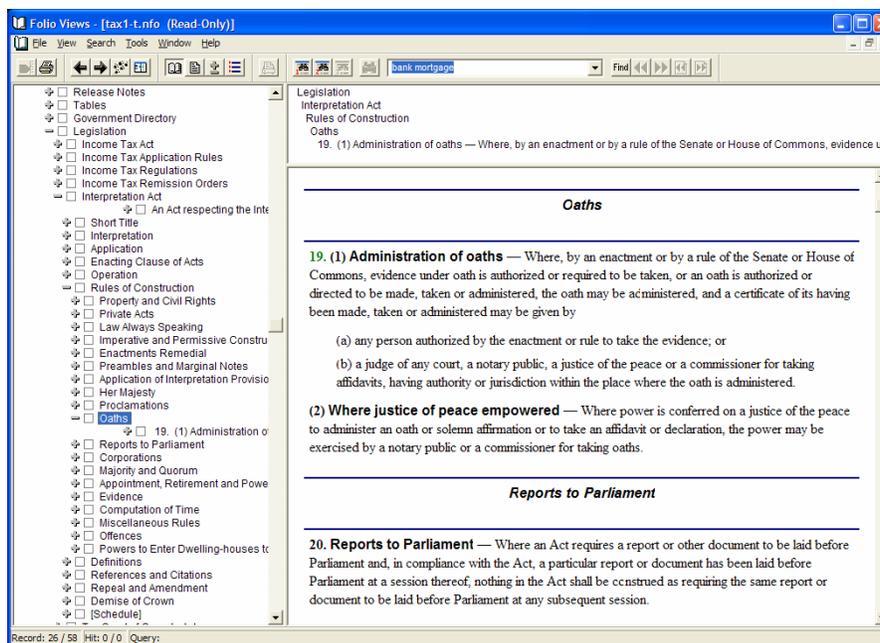
 **Print Document** – This **new** feature enables you to print documents with a single click, without having to go through the Print dialog.

 **Go Back / Go Forward** – The Go Back button returns you to your last jump or restores the last query. You can also click the Go Forward button, which will take you forward after you've gone back.

 **Show History** – Displays a log of all jumps and queries in the current session, and lets you return to an earlier jump or restore a previous query.

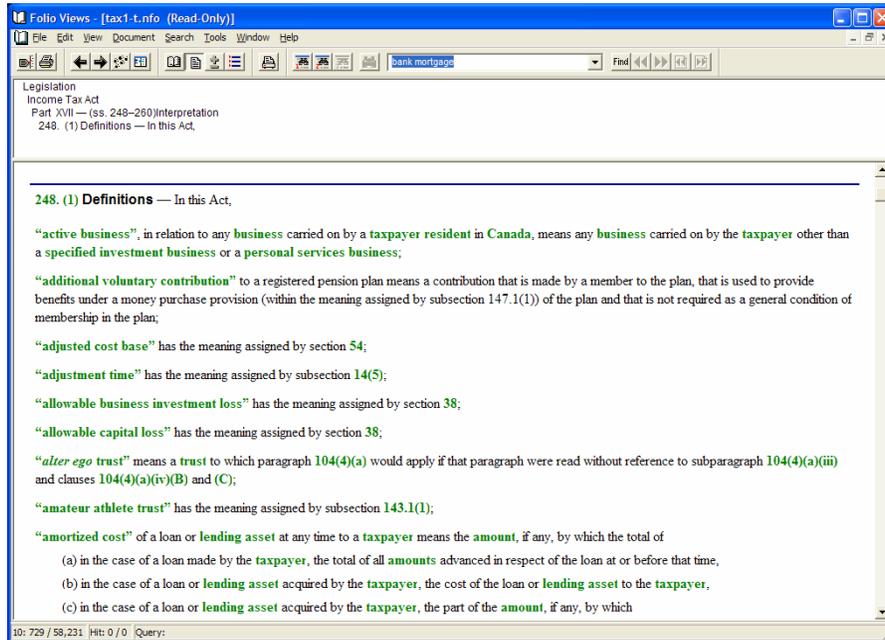
 **Synchronize Contents** - When you are in the Document pane, you may synchronize the Contents pane to your current location by choosing Synchronize Contents from the View menu. Doing so expands the appropriate branches in the Contents pane to indicate where you are relative to the rest of the infobase.

 **Table of Contents / Document Split View** – Click on this button to bring up the following view that contains both the table of contents and the document window:

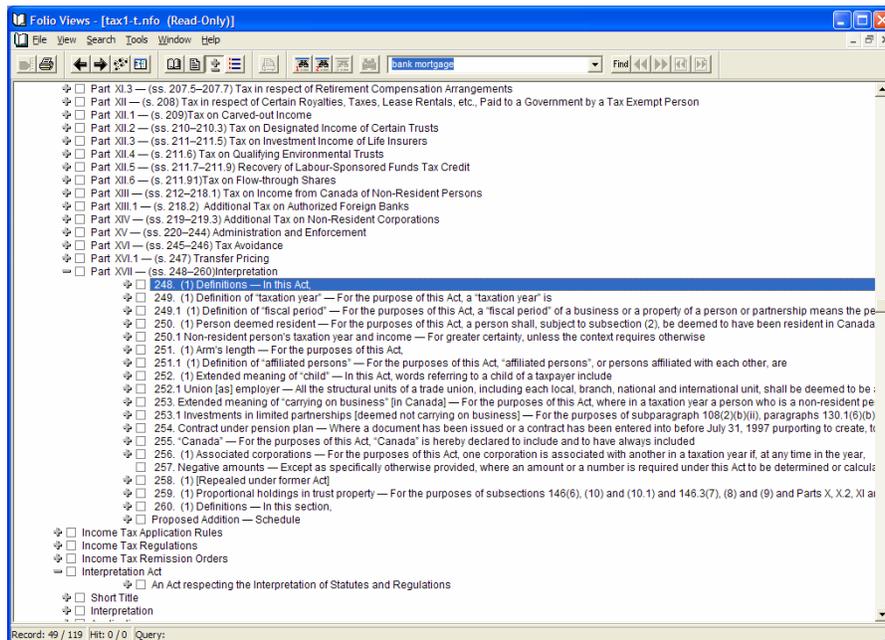


In previous versions of Folio, the table of contents would open in a separate window. In Folio 4.2, the contents are attached to the same window as the associated infobase. Note therefore that the View buttons control how the table of contents will be viewed. See below for a fuller discussion. Further in this guide we will discuss how certain functions in the menus are only available depending on whether your cursor is in the document pane or the table of contents pane

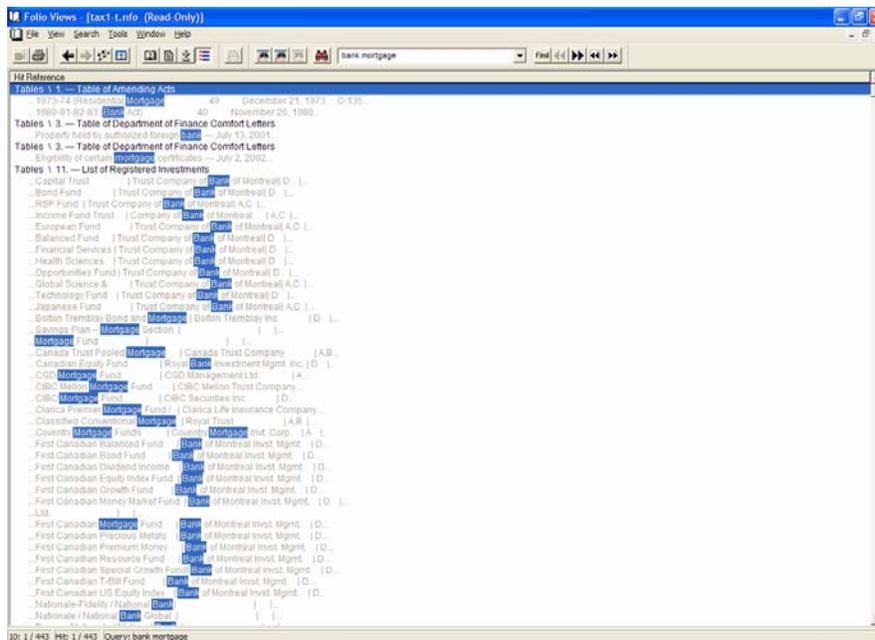
 **Document View** – Clicking on this button will result in just seeing the document:



 **Table of Contents View** – If you simply want to browse the table of contents, you can choose to view the table of contents only:



 **Hit List View** – The Hit List View will give you a list of your documents that have hits:



Query Templates – These customized query templates allow you to enter specific information into relevant fields to maximize your search capabilities and find information more effectively and faster.



Previous/Next Hit – Once you have conducted a search, you can use these convenient buttons to take you directly to the next occurrence of your search term.



Previous/Next Document Hit – Similar to the Previous/Next hit buttons. These buttons take you directly to the next *document* that contains your search term.

Using the search box on the toolbar:

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Note that using this Search field is essentially like using the **Advanced Query** that is available from the search menu. You may perform Boolean searches in this box and your hits are not in any way restricted. It is therefore quite easy to get started searching simply by using this field in conjunction with the table of contents to do some very sophisticated pinpoint searches.

Note that you can also access and rerun your previous searches by clicking on the down arrow that appears to the right of the box. The system remembers all the searches that you have performed regardless of whether that search was performed from a template or this search field. Note that rerunning searches that you originally performed in a template may result in odd behaviour in that you might note that your search is ignoring the checkmarks that you have subsequently put on the table of contents. That is because you originally ran the search and requested that checkmarks be ignored.

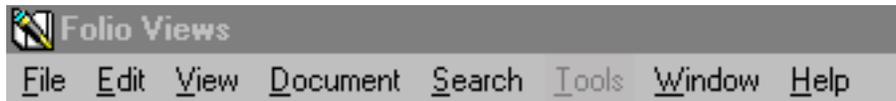


Figure 3: Only menus in black are detailed in this manual.

The following discussion is an overview of the most commonly used commands. For a complete discussion, consult the Folio Views Help infobase.

It is important to note that the contents of the menu and the menu themselves change depending on whether you are viewing the document or the table of contents. For example, the Document menu will disappear if you have your cursor in the table of contents. Similarly, the Edit menu will only appear if your cursor is in the Document pane. Finally, the contents of the View menu changes depending on what it is you are looking at

File Menu:

- **Open** – Opens the Infobase.
- **Close** – Closes the selected Infobase.
- **Export** – Use this command to save highlighted or tagged text to a file that can be opened by a word processor.
- **Print** – Opens the Print dialog box giving you several options for printing the document. You can print the current record, the current selection (if you've highlighted some text with your mouse), or you could print an entire section. See below for a more in-depth discussion on printing.

Edit Menu:

The Edit menu is comprised of items with which to handle text. This menu is only available when your cursor is in the document pane.

- **Copy** – Copies highlighted text to the clipboard for pasting into a document.
- **Tag Record** – Inserts a tag beside the record in which the cursor is currently placed.
- **Clear All Tags** – Removes tags from all tagged records.

View Menu:

The following commands are available when the cursor is in the document pane:

- **All Records** – Displays all records in the infobase. This is the default view.
- **Records with Hits** – Following a query, displays records with hits and hides those without. A record is generally a paragraph of text. Toggle switch: to remove, click Records With Hits again.
- **Tagged Records** – Use this option to collect the tagged records into a single view.

- **Documents with Hits** – Use Documents with Hits to display only those documents in the infobase that contain query hits. This can help you review these documents (i.e., a section of an act, a case, a government document), group them, print them, or export them easily.
- **Checked Branches** – Use Checked Branches to limit the view of the infobase to the branches selected in the Contents pane. When this option is chosen, only the selected sections in the Contents pane are displayed in the Document pane.
- **Synchronize Contents** – When you are in the Document pane, you may synchronize the Contents pane to your current location by choosing Synchronize Contents from the View menu. Doing so expands the appropriate branches in the Contents pane to indicate where you are relative to the rest of the infobase.

The following commands are available when the cursor is in the Table of Contents:

- **Expand to Level** – In Folio 3.x, there was a feature called the ribbon which allowed you to automatically open the entire table of contents to facilitate browsing. Use this command in Folio 4.2 to accomplish the same thing. Select “Level 10” to open the table of contents to the level at where the documents are listed.
- **Clear all Checks** – Use this command to clear all the checkboxes.

Document Menu:

- **Back One Document** – Takes you to the previous document in the infobase.
- **Top of Document** – Returns you to the top of the current document.
- **Down One Document** – Takes you to the next document in the infobase.
- **Next Document with Hits** – takes you to the next document in the infobase matching your search criteria.

Search Menu:

The search menu is comprised of ways to search for information.

- **Advanced Query** – Similar to the Query command, this query type allows you to select keywords from the “word wheel” and to limit your query to specifically check branches in the infobase. Boolean searches are also possible.
- **Clear Query** - Clears your query and removes text highlighting in the document and hit reference windows.
- **Next Hit / Previous Hit** - Once you have conducted a search, you can use these convenient options to take you directly to the next occurrence of your search term. Same as the Next / Previous Hit *Buttons* on the Toolbar.
- **Next/Previous Document Hit** - Similar to the Previous/Next hit buttons. These options take you directly to the next *document* that contains your search term. Same as the Next/Previous Document Hit *Buttons* on the Toolbar.
- **Go Back/ Go Forward** – The Go Back option returns you to your last jump or restores the last query. You can also click the Go Forward option, which will take you forward after you’ve gone back. Same as the Go Back/Forward *buttons* on the Toolbar.

- **Show History** – Displays a log of all jumps and queries in the current session, and lets you return to an earlier jump or restore a previous query. Same as the *Show History* button on the Toolbar.
- **Go To** – Lets you jump to a specific record number.

Window Menu:

The Window Menu shows options for displaying the windows within Folio Views, and lets you arrange them as detailed below.

- **Cascade** – Nests windows diagonally.
- **Tile Vertically** – Divides the screen into windows occupying each vertical section, and automatically places the active window at left or top left.
- **Tile Horizontally** – Divides the screen into windows occupying each horizontal section, and automatically places the active window at top or top left.
- **Close All** – Closes all open windows.

Help Menu:

The Help menu provides assistance with Folio Views. Using its options will open a separate instance of Folio providing tutorials and other information about Folio Views, the software on which the CD-ROM runs.

- **Contents** – Displays the *Folio VIEWS Help* table of contents.
- **How Do I** – Shows instructions for doing common tasks.
- **Overview** – Gives an overview of *Folio VIEWS* and infobase Technology.
- **Infobase** – Provides help information for the current infobase.

Printing:

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Introduction

Printing is significantly enhanced in Folio 4 to handle tables and other formatting options. In addition, you may now specify a section of the infobase to print (such as a case or even a single paragraph of legislation) without selecting or tagging the records beforehand. New in Folio 4 is the ability to select several sections in the Contents pane for printing.

Printing a Selection of Text:

Top

1. Highlight the block of text to be printed by holding down your left mouse button and dragging it over the text.
2. Click **Print**. The **Print** box appears with the **Selection** option already selected.
3. Click **OK** to begin printing.

Printing Records:

Top

1. Move to a query hit, or place your cursor in a record to be printed.
2. Click the **Tag** button or **Tag Record** under the **Edit** menu. A red vertical bar with an arrow appears left of the record the cursor is in.
3. Repeat the above steps to select each record you would like to print.

4. Click **Print**. The **Print** dialog box will appear with the **Tagged Records** option already selected.
5. Click **OK** to begin printing.

OR

If you would like to print a range of records, simply place your cursor at the first record, and click **Print**. Select the **Records** option and enter the last record number of the range of records you'd like to print in the **To** space.

Printing Sections:

Top

For the purposes of printing, a **section** is simply any part of the Table of Contents where you can put a checkmark. Therefore, a section could be as large as the entire Act or just a paragraph of one section in the Act.

When printing a section, you have three options:

- You select the Print Document button
- You can open the table of contents and check off the portions that you want to print. Then click on the Print button and make sure the **Section** option is selected. Click on OK.
- You can select sections after opening the Print dialog, but be advised that any existing checks on the table of contents will remain unless you clear them.

Important Note: If you choose not to select the Print Document button, you should ensure that you have cleared all checks from the table of contents. Anything that is checked on the table of contents will be printed. This is useful if you are browsing the table of contents and would like to print specific portions of the infobase for later review.

Printing the Reference Window Information:

Top

Sometimes, you might want to print the hierarchical information about a document that is contained within the reference window along with the document. This is simple to do. From the **Tools** menu, select *Options*. On the Print tab, check off "Inline headings". Click on OK and begin the procedure for printing the text that you want. The reference window information will be included at the top of your printed document.

Searching For Words, Phrases, & Other Data:

Top

Introduction:

Queries can be used either when you do not know exactly where to look in the table of contents; or when you are looking for any and all occurrences of words or phrases or other information such as a section or citation.

You can search for occurrences of a single word, combinations of words, single phrase, and/or combinations of phrases. Wildcards let you search for word patterns based on a single word or combination of words.

Records vs. Documents:

Top

The infobase can be thought of as a collection of documents all of which contain records:

- A *record* is usually a paragraph or a heading.
- A *document* is defined differently depending on the type of information. For example, a section of a legislative Act is a document. An entire judgment is a document as is a government publication like an interpretation bulletin.

It is important to understand the distinction between document and record. If you are searching for multiple words (e.g., bank and mortgage), the search engine will return hits in all documents that contain both words. When doing multiple word searches, it might be preferable to require that both words be contained within the same record. To do this, you must use the Templates and use the "Within same paragraph" field.

Search Templates:

Top

Advanced Query:

Accessible from the Search Menu or the shortcut key, **F2**, this query allows you to select keywords from the "word wheel" and to limit your query to checked branches in the infobase. Boolean searches are also possible.

Templates:

The templates are designed to get you quickly to the information you want by allowing you to search specific fielded information like section number or case name. The templates are also useful if you want to restrict your search to a specific record or paragraph.

Something new in Folio 4.2 is the **Checked Branches** box. If you open the template when there are branches checked on the table of contents, this box will have a checkmark in it. **If you leave this box checked, your template search will be restricted to just those branches of the infobase.** If you would like to restrict a template search to specific branches of the table of contents, it is necessary that you check those branches *before* opening the template

Search Operators and Connectors:

Top

This table provides a quick overview of the different types of connectors used in our Folio 4 CDs. More detailed examples are provided in the associated sections appearing below.

To Find	Connectors / Operators	Example
one term OR another	<i>or or </i>	<i>farm or losses</i>
one term AND another	Space, & or <i>and</i>	<i>farm losses</i>
one term but NOT another	<i>not or ^</i>	<i>farm not losses</i>
a phrase	put double-quotes around the phrase	<i>"for the tax year"</i>

one term near another, regardless of order	put the terms in double quotes, followed by @ n	"resulting trust"@5 finds the terms within 5 words of each other
one term near another in the order you input them	put the terms in double quotes, followed by / n	"child interests"/3 finds the terms as entered within 3 words of each other
variant letters	? in place of the variant letter	wom?n finds woman & women
various suffixes	* in place of 1 or more letters	rust* finds rust, rusted, rusting, rustproof
synonyms	\$ at the end of the keyword	Spouse\$ finds spouse, husband, wife, partner, etc.
words with common root	% at the end of the keyword	Bank% finds banks, banking (but NOT bankruptcy)

Order of Precedence:

Top

Searches involving greater than one operation are evaluated from left to right in this preferred order:

NOT OR XOR AND

Operations can be placed in parentheses for priority evaluation, e.g. in the search '**A or (B and C)**', (B and C) will be performed first.

Keyword Combinations:

Top

The process of finding occurrences of word combinations is a variation on that of finding a single word. The following variations of words can be found:

- Multiple words
- One word or another
- One word but not another
- Two mutually exclusive words.

Multiple Words:

Separate the keywords with a space, **and** or **&**

Example:

Shareholder liability limitation

Or

Shareholder **and** liability **and** limitation

Or

Shareholder **&** liability **&** limitation

The records containing occurrences of all the words will be found.

One Word OR Another:

Top

Separate the keywords with **or** or |

Example:

Employee **or** training

Or

Employee | training

The records containing occurrences of either or both words will be found.

One Word NOT Another:

Top

Separate the keywords with **not** or ^

Example:

Employee **not** training

Or

Employee ^ training

The records containing occurrences of the first word, but not the second, will be found.

Two Mutually Exclusive Words:

Top

Separate the keywords with **xor** or ~

Example:

Employee **xor** training

Or

Employee ~ training

The records containing occurrences of one word or the other, but not both, will be found.

Proximity Searches:

Top

You can find multiple words within a specified proximity of each other. A proximity search is useful for finding statements of law in which the search terms may not appear as a single phrase.

Regular Proximity:

Top

A regular proximity search finds words in a specified proximity but without regard to the order in which they are entered.

To find words appearing within x words of each other but without restriction to order, enter them in any order, within double-quotation marks, separated by a space and followed by @x, e.g. **"breach contract"@4**

Ordered Proximity:

Top

An ordered proximity search finds words in a specified proximity and in the order in which the words are entered.

An ordered proximity search can help you search portions of phrases or ideas in which words occur in a designated order but not necessarily side by side. To find words appearing with x words of each other and in a specific order, enter them in the required order, within double-quotation marks, separated by a space and followed by /x, e.g. **"reasonable probable"/7**

Searching A Single Phrase: **Top**

Finding a single phrase is similar to finding a single word. To find occurrences of a single phrase, enter the phrase in double-quotation marks, e.g. **"accounting records"**, in the Query Box's Search for field or the templates' *within same paragraph/document* field.

Phrase Combinations: **Top**

The process of finding occurrences of phrase combinations is a variation on that of finding a single phrase. The following variations of phrases can be found:

- Multiple phrases
- One phrase or another
- One phrase but not another
- Two mutually exclusive phrases

Multiple Phrases: **Top**

Enter the search phrases in double-quotation marks and separate them with a space, **and** or **&**

Example:

"accounting records" "books of account"

Or

"accounting records" **and** "books of account"

Or

"accounting records" **&** "books of account"

The records containing occurrences of all the phrases will be found.

One Phrase OR Another: **Top**

Enter the search phrases in double-quotation marks and separate them with **or** or **|**

Example:

"accounting records" **or** "books of account"

Or

"accounting records" **|** "books of account"

The records containing occurrences of either phrase will be found.

One Phrase NOT Another: **Top**

Enter the phrases in double-quotation marks and separate them with **not** or **^**

Example:
"accounting records" **not** "general ledgers"
Or
"accounting records" ^ "general ledgers"

The records containing occurrences of the first phrase, but not the second, will be found.

When performing a NOT search in a Folio 4 product, the system will take you to the top of the first document with a hit, instead of taking you directly to your first hit. You must then click on the next hit button to get to your first hit. Similarly, as you cycle through your hits, you will always be taken to the top of the document before being taken to the hit itself within the document

Two Mutually Exclusive Phrases:

Top

Enter the phrases in double-quotation marks and separate them with **xor** or **~**

Example:
"accounting records" **xor** "general ledgers"
Or
"accounting records" **~** "general ledgers"

Records containing occurrences of one phrase, but not the second, are found.

Wildcards (word variations):

Top

Wildcards can help you find the following variations on words:

- Words with one or more letter(s) omitted
- Synonyms
- Words with a common root

In Folio 4.2 it is possible to use wildcards within phrase or proximity searches.

Words with an Omitted Letter:

Top

Type the word with the wildcard **?** in place of a letter. All matching words are found, e.g. wom?n will find woman or women.

Words with several Omitted Letters:

Top

Enter the word with the wildcard ***** in the place of two or more missing letters. All matching words are found, e.g., **B*k** will find bank, bark, and any other word that begins with b and ends with a k.

And

B*y will find by, bankruptcy, etc.

And

B* will find any word that begins with a b.

And

Bank* will find bank, bankrupt, and bankruptcy.

Synonyms:

Top

Type the word with the wildcard \$ and you will find all matching words plus its synonyms, e.g., spouse\$ will find spouse, husband, wife, partner, etc.

Words with Common Roots:

Top

Enter the word followed by the wildcard %. All words with the same root as well as a simple suffix are found,

Example: **bank%** would find bank, banks, banking, but not bankrupt or bankruptcy.

Abbreviations:

Top

The following are recommendations for finding abbreviations, whether a single word or within a phrase, including a case name.

To find all occurrences of a single abbreviation, enter the abbreviation with and without periods and separated by **or**, e.g. cibc **or** c.i.b.c.

In Folio 3.X, if you had typed c.i.b.c. with the period at the end, you would have received no hits because of a flaw in that search engine. In Folio 4.2, adding the period on the end will not affect your search

Tagging Records:

Top

- Move to a query hit, or place your cursor in a record to be tagged.
- Click **Tag Record** or type **Ctrl-T**. A vertical bar appears in the record's left margin.
- Repeat the above steps for as many records as you wish. All the tagged records can be printed. Unless removed, tags will remain in place for the duration of your current session.

- To display tagged records only, click **Tagged Records** under the **View** menu. To restore all the records, click **All Records** under **View**.
- To remove a tag, place the cursor within the tagged record and click **the Tag button in the Toolbar**. The vertical bar disappears.
- To remove all tags, click **Clear All Tags** under the **Edit** menu. The vertical bars disappear.