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EUROPEAN COMMISSION FOR DEMOCRACY THROUGH LAW

(VENICE COMMISSION)

Folio siteDirector 4 User's Guide

(Infobase browser)

Folio siteDirector 4 Users Guide

Folio siteDirector 4 allows information publishers to deliver mission-critical information over Internets or Intranets. The information is stored in Folio Corporation's infobase format and converted to HTML on-the-fly. The infobase format allows you, accessing this site through your web browser, to search for and view information in ways that go beyond traditional HTML indexing and display paradigms.

This help file should provide you with the basics of using Folio siteDirector 4, including:

- **Understanding the User Interface** — Folio siteDirector makes use of several default buttons and views that may be new to you.

- **Browsing Infobases** — Folio siteDirector serves HTML pages in your browser. However, because there is an infobase on the back end of that HTML, there is some functionality available for browsing information that may be new to you.

- **Searching Infobases** — The powerful Folio search engine enables you to find what you need, when you need it.

Use the buttons on each page to move you forward or back through this help file. Or, use the table of contents to browse through the infobase. To search, click the Query button.

Understanding the User Interface

Folio siteDirector allows site administrators to completely customize how infobases are displayed over the web. As such, the appearance of the site you are currently using may be completely different from any other site running Folio siteDirector. However, typically there are several components that are constant. This section describes those components.
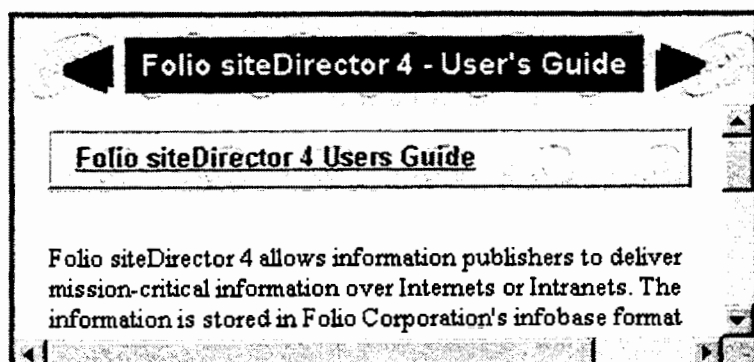
- Document View
- Contents View
- Hit List View
- Query Views
- Intermediate Query Results
- Combined Views
- Standard Buttons

Document View

The document view displays the main body of the infobase. Within the document view, you can read the text of the infobase, view images, and follow links to other areas in the infobase. Usually, the document view provides links (either text or graphic buttons) to take you to the next or previous page of information in the infobase.

The document view also highlights the hits from queries on the infobase. Usually, these hits are marked by red arrows. For example, this is an ▶example hit◀.

Below is a simple document view. Note the graphics at the top of the page; these are for moving forward and back through the infobase.
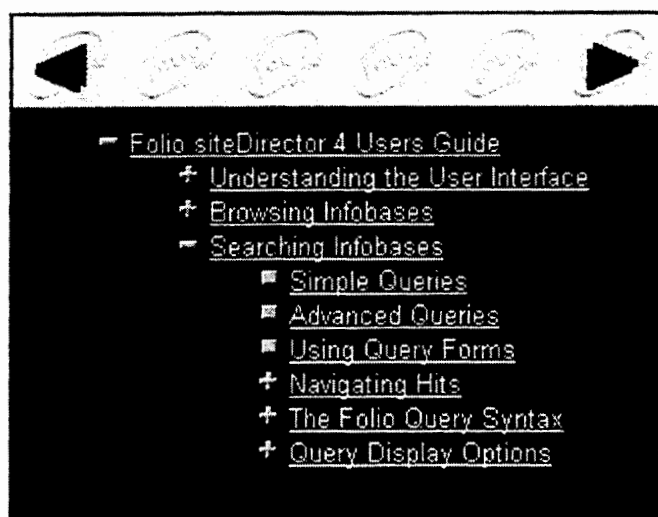

Contents View

The Contents view displays the table of contents for an infobase. The table of contents may be expanded or collapsed by clicking the ⊞ and ⊟ images next to each heading in the view. Click a ⊞ to expand a branch of the table of

contents; click a ▭ to collapse a branch.

Each heading in the contents view is linked to the corresponding information in the body of the infobase. When you follow the link, the information is displayed in a document view.

Below is a simple contents view. Note the ⊹ and ▭ images next to the headings that can be expanded or collapsed. Also note the ▢ images next to headings which are fully expanded.

Hit List View

The Hit List view displays a summary of query hits for the infobase. This view is only populated if you have performed a search on the infobase.

The hit list view will have at least one column; often, it will have two or more columns. Text in the first column is always linked to the corresponding information in the body of the infobase. When you follow the link, the information is displayed in a document view.

The hit list view most often displays the relative rank of the hit in the first column and the heading path in the second column. The relative rank only applies to ranked queries (as is done through a simple query and through some custom query forms). The heading path lists the parent headings of the information (such as Chapter 2 \ Section 3 \ Item 47). These are the same headings as are displayed in the contents view.

The hit list may also display a snippet from the body of the infobase, showing a few words around each actual query hit, beneath the heading list. You could use this information to better identify the context of the hit before linking to the full information.

Below is a simple hit list view. Note the information in the columns. Also note that only the first column is linked.

Rank	Hit Reference
100	Folio siteDirector 4 Users Guide \ Searching Infobases \ [
99	Folio siteDirector 4 Users Guide \ Browsing Infobases \ B
98	Folio siteDirector 4 Users Guide \ Searching Infobases \ /
97	Folio siteDirector 4 Users Guide \ Searching Infobases \ l
97	Folio siteDirector 4 Users Guide \ Searching Infobases \ 1 (And, Or, Not, XOr) \ Or

Query Views

The query views provide a form for you to query one or more infobases. Typically, the form provides a list box to choose the infobases you wish to query and one or more fields to enter the terms you wish to search for. It may also provide a set of options to control how the information is displayed.

There are basically two types of queries: the simple query and the advanced query. The simple query does not require you to know anything about the Folio query syntax and provides ranked results. The advanced query requires that you understand the Folio query syntax and does not provide ranked results by default. Most single-field query forms use the simple query method; multiple-field query forms usually use the advanced query method. However, most multiple-field query forms attempt to hide the Folio query syntax from you (they make sure the syntax is correct for you), so you do not need to learn it unless you want to.

See Simple Queries and Advanced Queries for more information.

Below is a query view that uses the simple query method. Note the list of infobases to choose from and the single field for entering the terms wish to search for.

Intermediate Query Results

After performing a search, you may be taken to an intermediate query results page. Rather than taking you to the first hit in the document view, this page shows you the number of hits for each infobase that you searched. Some also display a query map to help you see which terms had the greatest effect on the search. The query map allows you to see immediately if a structure or term is part of the infobase, as well as which combinations of structures and terms provide hits.

From the intermediate query results page, you can link to the document view to see the first hit in the selected infobase.

Below is a simple query results page.

Folio Views 4 Getting Started
Returned a total of 39 Hits

All View | Document View

Folio siteDirector 4 - User's Guide
Returned a total of 4 Hits
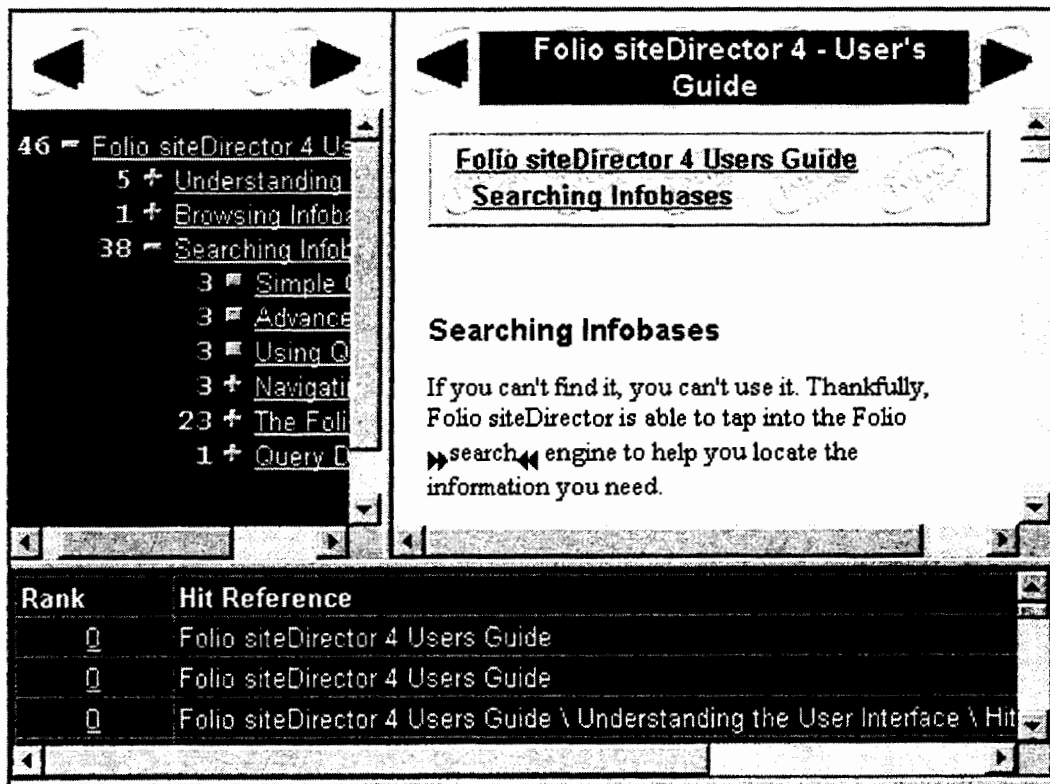

All View | Document View

Combined Views

Using frames, these basic views may be combined on a single page. For example, a common view shows the contents view on the left of the page and the document view on the right. Following links in the contents view updates the document view. Another common view shows the document view on the top of the page and the hit list view on the bottom of the page. Again, as you follow links from the hit list, the document is updated.

No matter what combination of views the site designer creates, simply remember that the primary functionality comes from the Document, Contents, or Hit List views (query views are usually on their own page).

Below is a simple combined view, showing the contents, document, and hit list views. Note that a query hit is highlighted in the document view.

Standard Buttons

siteDirector includes several standard buttons to aid in navigating through infobases. These include buttons for moving to the next and previous page, moving to the next and previous hit, querying the infobase, or changing to another view of the infobase.

The standard buttons are divided into the following categories:

- Navigation Buttons
- View Buttons
- Query Buttons

Navigation Buttons

Navigation buttons help you move through the infobase. These buttons include:

- Next & Previous Page
- Next & Previous Hit

Next & Previous Page

Folio siteDirector transfers only a discrete portion of the infobase to the browser for display; this saves time and bandwidth. These buttons display the previous or next portion of the infobase when clicked. Notice that the buttons change when the cursor is placed over them.

Next & Previous Hit

Query hits are highlighted with arrow icons (▶query hit◀). By clicking the Previous and Next Hit buttons, the browser displays the appropriate hit.

View Tabs

View tabs are displayed in the bottom pane of the browser window and allow you to choose the display you wish to see.

These tabs include:

- Document
- Contents
- Hit List

Document

● All 🔍 Search | 📖 Browse | 📄 **Document** | 🔱 Contents | ☰ HitList

Clicking the Document tab displays the document view of an infobase, allowing you to view the main body of information for the infobase.

Contents

● All 🔍 Search | 📖 Browse | 📄 Document | 🔱 **Contents** | ☰ HitList

Clicking the Contents tab displays the contents view of an infobase. The contents view contains a fully functional infobase Table of Contents window, complete with expandable and collapsible branches. You may follow links from the headings in the contents view to the document view.

Hit List

● All 🔍 Search | 📖 Browse | 📄 Document | 🔱 Contents | ☰ **HitList**

Clicking the Hit List tab displays the hit list view of an infobase. If no query has been performed, the hit list is empty; if a query has been performed, then the hit list displays heading information for each hit. You may follow links from headings in the hit list view to the document view.

The other tabs — All, Search, and Browse — combine the other views in useful ways.

Query Buttons

Query buttons display different query forms for you to use.

Query Single or Multiple Infobases

🔍   Multi-Query

The query single infobase button displays a form that queries a single infobase. The query multiple infobase button displays a form that allows you to search several infobases at once. These buttons may use the simple query format, which automatically ranks queries by relevance or the advanced query format (which allows you to take advantage of the powerful Folio query syntax), or a custom query form which provides you with several fields to fill in before submitting the query.

| | ← Search |

Additionally, you can simply type your query in the query edit box and click the Search button. The query edit box is located in the bottom pane of your browser when viewing an infobase.

Browsing Infobases

Users familiar with the World Wide Web understand the HTML browsing paradigm. Navigating a series of HTML pages is made possible by clicking hypertext links or by pressing the Forward or Back buttons on your Web browser.

Not surprisingly, infobases delivered to your browser in HTML act just like the HTML pages that you encounter on the Web every day. However, Folio siteDirector does provide some additional functionality that makes browsing large collections of information easier.

- Browsing with Previous/Next
- Browsing with the Table of Contents
- Browsing with the Hit List

Browsing with Previous/Next

Typically, each document page (and often, each contents and hit list page) contains next and previous buttons. The next button loads the next set of information from the infobase; the previous button loads the previous set.

Use these buttons to read through the available information.

◀ **Prev**   ▶ **Next**

Notice that the image changes when the cursor is placed over the button.

Browsing with the Table of Contents

Folio siteDirector builds a dynamically linked Table of Contents for each infobase. Headings listed in the Table of Contents window are linked to the corresponding information in the infobase.

The Table of Contents is a powerful tool for finding information quickly in the infobase. In order for you to be able to use it effectively, though, you must be familiar with the following processes:

• Linking from Headings

• Expanding & Collapsing Headings

Linking from Headings

Each heading in the Contents window is linked to the corresponding section in the infobase. These links are created automatically by siteDirector based upon the structure of the infobase.

To link from any heading (or any other line which may appear in the Table of Contents window):

1   Click the heading in the Contents view that you wish to link to.

    •The document view should update to display the text of the infobase at the heading specified.

You may need to expand parts of the Table of Contents to find the heading you wish to link to.

Expanding & Collapsing Headings

Headings in the Table of Contents may have sub-headings beneath them. These sub-headings may be individually displayed or hidden (expanded or collapsed), depending on what you need to see.

To expand or collapse headings:

1   Click any plus (⊕) or minus (⊟) to expand or collapse the heading.

    •A ⊕ indicates that the heading may be expanded.

    •A ⊟ indicates that the heading may be collapsed.

    •A ▣ indicates that the level is fully expanded.

Browsing with the Hit List

After you perform a search on the infobase, Folio siteDirector generates a hit list. This hit list provides summary information about each hit, including where the hit is located in the infobase. Depending on how the infobase is set up and the type of query performed, the hit list may also display the relative rank of each hit.

Each entry in the hit list is linked to the corresponding text in the infobase. By scanning the hit list, you can quickly identify information that may be of use to you and then link to it.

Linking from the Hit List

The first column in the hit list is linked to the document text in the infobase. To link from the hit list to the document text:

1   Click the information in the Hit List view that you wish to link to.

    •The document view should update to display the text of the infobase at the heading specified.

Searching Infobases

If you can't find it, you can't use it. Thankfully, Folio siteDirector is able to tap into the Folio search engine to help you locate the information you need.

This section will cover the topics listed below. Click on a link for a detailed discussion of a particular topic.

• Simple Queries — Steps for performing a simple query on one or more infobases. Simple queries do no require you to know any query syntax and return the most relevant hits.

• Advanced Queries — Steps for performing an advanced query on one or more infobases. Advanced queries require you to understand some of the Folio query syntax and returns the hits in the order that they appear in the infobase.

- Using Query Forms — Query forms provide one or more entry fields to help you locate information in an infobase. Usually, they mask the query syntax from you, allowing you to focus on what you want to find rather than the mechanics of finding it.
- Navigating Hits — Once you have completed your search, there are several ways to browse the information you have found.
- The Folio Query Syntax — Provides details on the portions of the Folio query syntax most often used with siteDirector.
- Query Display Options — Reviews the display options you may set after (or in the process) of performing a query.

Simple Queries

Simple queries are automatically ranked by relevance. The first hit is the most relevant and the last hit is the least relevant. (Relevance is determined using an industry-standard formula).

Results from a relevancy ranked search are displayed in relevant order in the Hit List. Following a link in the hit list takes you to the full text of the hit in the document view.

To perform a simple search using Folio siteDirector 4:

1   Click the Query button.
    •The Query form should appear.
2   Select one or more infobases to search in.
    •Click on a single infobase in the list to search a single infobase.
    •Hold down the CTRL key and click on additional infobases to search multiple infobases.
3   Enter the keywords you wish to search for.
    •Separate terms with spaces.
    •To search for an exact phrase, enclose the terms in double quotes (such as "the king and I").
4   Set any desired display options for the query.
    •See Query Display Options for more information.
5   Choose **Query** to submit the search.

After submitting the search, you are taken to one of two pages:

- A page containing a summary of the results of the query and a link to the document view for the infobase
- A page containing the first hit.

If you search multiple infobases, the first page gives you a chance to review the hit summaries and decide which infobase to view. The second option simply takes you to the first hit in the first queried infobase.

If necessary, select which infobase to view and then use the Next Hit and Previous Hit buttons to move through the search hits. See Navigating Hits for other ways of moving between search hits.

Advanced Queries

Advanced queries give you more control over your searches than simple queries do. However, they require that you understand some of the Folio Query Syntax. They also are not ranked; the hits are listed in the order that they appear in the infobase.

Advanced queries allow you to control how the search is evaluated. You can specify Boolean operators or proximity operators and use wildcards to expand what you are searching for.

To perform an advanced query search using Folio siteDirector 4:

1   Click the Advanced Query button.
    •The Advanced Query form should appear.
2   Select one or more infobases to search in.
    •Click on a single infobase in the list to search a single infobase.
    •Hold down the CTRL key and click on additional infobases to search multiple infobases.
3   Type the words you wish to search for, separated by a space or the appropriate operator.
    •You may search by keyword (not using any specific operators). For example:
        paragraph formatting options
    •You may search for an exact phrase. Enclose the phrase in quotation marks. For example:
        "to be or not to be"

•You may use Boolean operators (and, or, not, exclusive or). For example:

dog and cat

dog or cat

dog not cat

dog xor cat

•You may use wildcards (single character, multiple character, word form, synonym). For example:

wor?

work*

work%

work$

•You may use proximity operators to specify how close terms must be. For example:

"netscape infobase"/5

•If you wish to modify a previous query, click the Prev button next to the **Query For** box to display the previous query.

•Note that as you type, the Query dialog attempts to complete the word you are typing with a word contained in the infobase. If the word is correct, press the ENTER key and type the next term.

4   Set any desired display options for the query.

•See Query Display Options for more information.

5   Choose **Query** to submit the search.

•A page containing a summary of the results of the query and a link to the document view for the infobase

A page containing the first hit.

If you search multiple infobases, the first page gives you a chance to review the hit summaries and decide which infobase to view. The second option simply takes you to the first hit in the first queried infobase.

If necessary, select which infobase to view and then use the Next Hit and Previous Hit buttons to move through the search hits. See Navigating Hits for other ways of moving between search hits.

Using Query Forms

Many sites provide custom query forms to simplify searching for specific items. These forms typically ask you to fill in one or more fields on the form. Some fields may be required.

The site administrator should provide additional help information for complicated query forms. In general, the process for using a query form is:

1   Click on the Query Form button.

•The actual button used, and its name, will vary depending on the site.

•The query form should appear.

2   Fill in as many fields as necessary.

•Typically, the more fields you fill in, the more precise the search will be.

•You may be able to use various operators from the Folio Query Syntax.

3   Set any desired display options for the query.

•See Query Display Options for more information.

4   Choose **Query** to submit the search.

•A page containing a summary of the results of the query and a link to the document view for the infobase

•A page containing the first hit.

If you search multiple infobases, the first page gives you a chance to review the hit summaries and decide which infobase to view. The second option simply takes you to the first hit in the first queried infobase.

If necessary, select which infobase to view and then use the Next Hit and Previous Hit buttons to move through the search hits. See Navigating Hits for other ways of moving between search hits.

Navigating Hits

Once you have created and evaluated a query, you can view the search results in the infobase or infobases you've searched. Folio siteDirector gives you two ways to look at your search results — browsing , the Hit List, and Table of Contents.

Navigating Hits: Browsing

Search hits are highlighted with red arrow icons. For example: ▶Example Hit◀

Use the Next Hit and Previous Hit buttons to move from one page of hits to the next. (The Next and Previous buttons simply take you to the next page, which may or may not contain hits.)

Navigating Hits: Hit List

Use the Hit List view (if provided) to see a summary of the hits in the infobase. Usually, the heading where the hit is located is displayed, which gives you an idea of the context for the hit and helps you evaluate its importance.

The first column in the hit list is linked to the corresponding heading in the body of the infobase. Following the link usually displays a document view of the infobase, which you may then browse through using the Next Hit and Previous Hit buttons.

Navigating Hits: Table of Contents

Use the Table of Contents view to see the table of contents for the infobase. Some search forms allow you to set display options for the table of contents (including words around hits and query results). If these options are set, then you can quickly scan through the table of contents for the heading which contain the most hits (query results) or which have the right context (words around hits).

Each heading in the table of contents is linked to the corresponding heading in the body of the infobase. Following the link usually displays the document view of the infobase, which you may then browse through using the Next Hit and Previous Hit buttons.

For more information on how to use the Table of Contents, see Browsing With the Table of Contents.

The Folio Query Syntax

Folio siteDirector allows Web users to access the infobase search engine to perform full-text queries for the information they need — quickly and easily. The basic query constructions detailed here will enable you to search infobases (or groups of infobases) in a variety of ways.

Please note that the Folio query syntax is only for use with advanced queries. This syntax does not work with simple queries.

Also note that these syntax elements may be combined for different effects. Constructions may be grouped together using parentheses, if necessary.

Basic query constructions include:
- Keyword & Phrase Searches
- Boolean Operator Searches
- Wildcard Searches
- Proximity Searches

Keyword & Phrase Searches

Keyword and phrase searches are the most basic types of searches you can perform in Folio Views. They are the building blocks for all other types of searches.

A keyword search finds all records which contain the words you specify. Separate key words by spaces.

A phrase search finds all records which contain an exact phrase. The phrase you wish to find must be enclosed in quotes.

Keyword Searches

Type each word you wish to search for, separated by spaces, into the Advanced Query dialog.

Query	Explanation
cat	Finds all records which contain cat
cat dog	Finds all records which contain both cat and dog (in any order)
cat dog mouse	Finds all records which contain all three of the words cat, dog, and mouse (in any order)

Phrase

Type the phrase you wish to search for in full quotation marks.

Note that a phrase is considered to be a single term and may be used as a keyword (see the second example, below).

Also note that phrases may use wildcards. See Wildcard Searches for more information.

Query	Explanation
"to be or not to be"	Finds all records which contain the exact phrase "to be or not to be"
"president lincoln" assassination	Finds all records which contain both the exact phrase "president lincoln" and the word assassination. Note that this combines a phrase search and a keyword search.
"the great* debate"	Finds all records which contain phrases which match the pattern (such as "the great debate" or "the greatest debate").

Boolean Operator Searches (And, Or, Not, XOr)

The Boolean operators allow you to refine your queries to focus on more specific or more general information than may be found with a single word or phrase search.

Boolean operators require a word or phrase on either side of the operator. For example, **dog or cat** is a valid query, but **or cat** is not.

There are four Boolean operators: And, Or, Not, Exclusive Or. See Operator Precedence for a discussion of the precedence (order of execution) of these operators and how to override the precedence.

And

Use the And operator to search for multiple words in the same record (this is same as the multiple word search described in Simple Queries).

The And operator may be specified any one of three ways: a single space between words, the ampersand **&**, or the word **and**.

Query	Explanation
ham eggs ham & eggs ham and eggs	Finds all record which contain both ham and eggs
ham & eggs and "cold milk"	Finds all record which contain ham, eggs, and the phrase "cold milk"

Or

Use the Or operator to search for multiple words in the infobase (the words may or may not be in the same record).

The Or operator may be specified one of two ways: the pipe | or the word **or**.

Query	Explanation
me | you me or you	Finds all records which contain either me or you (may contain both)
me or you and him	Finds all records which contain him and either me or you (or both me and you). (See Operator Precedence for additional explanation on these results.)

Not

Use the Not operator to search for records which do not contain a particular term or set of terms. Not is actually a unary operator (it can be used by itself), but it is often used in between two terms (find records which contain A but not B).

Generally, the best way to think of the Not operator when used between two terms (A not B) is "find records with A and find records without B" (A and not B).

The Not operator may be specified one of two ways: the caret **^** or the word **not**.

Query	Explanation
dog ^ cat dog not cat	Finds all records which contain dog but which do not contain cat.

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- **Browsing Infobases** — Folio siteDirector serves HTML pages in your browser. However, because there is an infobase on the back end of that HTML, there is some functionality available for browsing information that may be new to you.
- **Searching Infobases** — The powerful Folio search engine enables you to find what you need, when you need it.

Use the buttons on each page to move you forward or back through this help file. Or, use the table of contents to browse through the infobase. To search, click the Query button.

Understanding the User Interface

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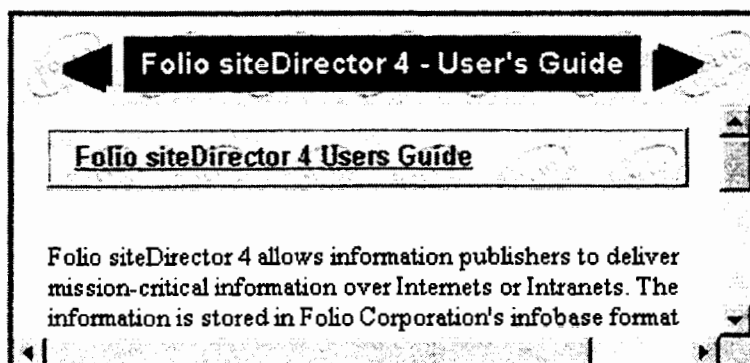
- Document View
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Document View

The document view displays the main body of the infobase. Within the document view, you can read the text of the infobase, view images, and follow links to other areas in the infobase. Usually, the document view provides links (either text or graphic buttons) to take you to the next or previous page of information in the infobase.

The document view also highlights the hits from queries on the infobase. Usually, these hits are marked by red arrows. For example, this is an ▶example hit◀.

Below is a simple document view. Note the graphics at the top of the page; these are for moving forward and back through the infobase.

Contents View

The Contents view displays the table of contents for an infobase. The table of contents may be expanded or collapsed by clicking the ⊞ and ⊟ images next to each heading in the view. Click a ⊞ to expand a branch of the table of

contents; click a ☐ to collapse a branch.

Each heading in the contents view is linked to the corresponding information in the body of the infobase. When you follow the link, the information is displayed in a document view.

Below is a simple contents view. Note the ⊕ and ☐ images next to the headings that can be expanded or collapsed. Also note the ☐ images next to headings which are fully expanded.

Hit List View

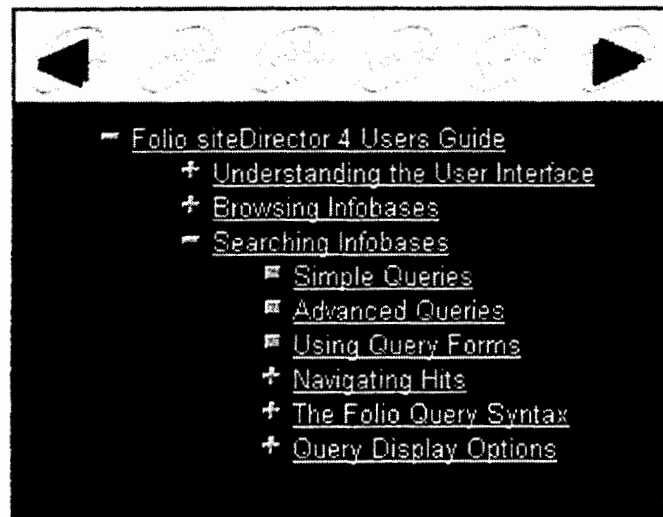The Hit List view displays a summary of query hits for the infobase. This view is only populated if you have performed a search on the infobase.

The hit list view will have at least one column; often, it will have two or more columns. Text in the first column is always linked to the corresponding information in the body of the infobase. When you follow the link, the information is displayed in a document view.

The hit list view most often displays the relative rank of the hit in the first column and the heading path in the second column. The relative rank only applies to ranked queries (as is done through a simple query and through some custom query forms). The heading path lists the parent headings of the information (such as Chapter 2 \ Section 3 \ Item 47). These are the same headings as are displayed in the contents view.

The hit list may also display a snippet from the body of the infobase, showing a few words around each actual query hit, beneath the heading list. You could use this information to better identify the context of the hit before linking to the full information.

Below is a simple hit list view. Note the information in the columns. Also note that only the first column is linked.

Rank	Hit Reference
100	Folio siteDirector 4 Users Guide \ Searching Infobases \
99	Folio siteDirector 4 Users Guide \ Browsing Infobases \ B
98	Folio siteDirector 4 Users Guide \ Searching Infobases \
97	Folio siteDirector 4 Users Guide \ Searching Infobases \
97	Folio siteDirector 4 Users Guide \ Searching Infobases \ (And, Or, Not, XOr) \ Or

Query Views

The query views provide a form for you to query one or more infobases. Typically, the form provides a list box to choose the infobases you wish to query and one or more fields to enter the terms you wish to search for. It may also provide a set of options to control how the information is displayed.

There are basically two types of queries: the simple query and the advanced query. The simple query does not require you to know anything about the Folio query syntax and provides ranked results. The advanced query requires that you understand the Folio query syntax and does not provide ranked results by default. Most single-field query forms use the simple query method; multiple-field query forms usually use the advanced query method. However, most multiple-field query forms attempt to hide the Folio query syntax from you (they make sure the syntax is correct for you), so you do not need to learn it unless you want to.

See Simple Queries and Advanced Queries for more information.

Below is a query view that uses the simple query method. Note the list of infobases to choose from and the single field for entering the terms wish to search for.

```
                  Select the infobase to query:
                  ┌────────────────────────┬──┐
                  │ FolioHelp             ▼│  │
                  └────────────────────────┴──┘

                         Query for:
                  ┌──────────────────────────┐
                  │                        ▲ │
                  │                          │
                  │                          │
                  │                        ▼ │
                  │ ◄                      ►  │
                  └──────────────────────────┘

                     ┌───────┬───────┐
                     │ Query │ Clear │
                     └───────┴───────┘
```

Intermediate Query Results

After performing a search, you may be taken to an intermediate query results page. Rather than taking you to the first hit in the document view, this page shows you the number of hits for each infobase that you searched. Some also display a query map to help you see which terms had the greatest effect on the search. The query map allows you to see immediately if a structure or term is part of the infobase, as well as which combinations of structures and terms provide hits.

From the intermediate query results page, you can link to the document view to see the first hit in the selected infobase.

Below is a simple query results page.

Folio Views 4 Getting Started
Returned a total of 39 Hits

```
     folio - 154┐
     help - 45 ┘ & - 39
```

All View | Document View

Folio siteDirector 4 - User's Guide
Returned a total of 4 Hits

```
     folio - 19┐
     help - 11┘ & - 4
```

All View | Document View

Combined Views

Using frames, these basic views may be combined on a single page. For example, a common view shows the contents view on the left of the page and the document view on the right. Following links in the contents view updates the document view. Another common view shows the document view on the top of the page and the hit list view on the bottom of the page. Again, as you follow links from the hit list, the document is updated.

No matter what combination of views the site designer creates, simply remember that the primary functionality comes from the Document, Contents, or Hit List views (query views are usually on their own page).

Below is a simple combined view, showing the contents, document, and hit list views. Note that a query hit is highlighted in the document view.

Standard Buttons

siteDirector includes several standard buttons to aid in navigating through infobases. These include buttons for moving to the next and previous page, moving to the next and previous hit, querying the infobase, or changing to another view of the infobase.

The standard buttons are divided into the following categories:

*   Navigation Buttons
*   View Buttons
*   Query Buttons

Navigation Buttons

Navigation buttons help you move through the infobase. These buttons include:

*   Next & Previous Page
*   Next & Previous Hit

Next & Previous Page

Folio siteDirector transfers only a discrete portion of the infobase to the browser for display; this saves time and bandwidth. These buttons display the previous or next portion of the infobase when clicked. Notice that the buttons change when the cursor is placed over them.

Next & Previous Hit

Query hits are highlighted with arrow icons (▶▶query hit◀◀). By clicking the Previous and Next Hit buttons, the browser displays the appropriate hit.

View Tabs

View tabs are displayed in the bottom pane of the browser window and allow you to choose the display you wish to see.

These tabs include:

- Document
- Contents
- Hit List

Document

● All 🔍 Search 📖 Browse 📄 **Document** ⬆ Contents ☰ HitList

Clicking the Document tab displays the document view of an infobase, allowing you to view the main body of information for the infobase.

Contents

● All 🔍 Search 📖 Browse 📄 Document ⬆ **Contents** ☰ HitList

Clicking the Contents tab displays the contents view of an infobase. The contents view contains a fully functional infobase Table of Contents window, complete with expandable and collapsible branches. You may follow links from the headings in the contents view to the document view.

Hit List

● All 🔍 Search 📖 Browse 📄 Document ⬆ Contents ☰ **HitList**

Clicking the Hit List tab displays the hit list view of an infobase. If no query has been performed, the hit list is empty; if a query has been performed, then the hit list displays heading information for each hit. You may follow links from headings in the hit list view to the document view.

The other tabs — All, Search, and Browse — combine the other views in useful ways.

Query Buttons

Query buttons display different query forms for you to use.

Query Single or Multiple Infobases

🔍   **Multi-Query**

The query single infobase button displays a form that queries a single infobase. The query multiple infobase button displays a form that allows you to search several infobases at once. These buttons may use the simple query format, which automatically ranks queries by relevance or the advanced query format (which allows you to take advantage of the powerful Folio query syntax), or a custom query form which provides you with several fields to fill in before submitting the query.

⬅ Search

Additionally, you can simply type your query in the query edit box and click the Search button. The query edit box is located in the bottom pane of your browser when viewing an infobase.

Browsing Infobases

Users familiar with the World Wide Web understand the HTML browsing paradigm. Navigating a series of HTML pages is made possible by clicking hypertext links or by pressing the Forward or Back buttons on your Web browser.

Not surprisingly, infobases delivered to your browser in HTML act just like the HTML pages that you encounter on the Web every day. However, Folio siteDirector does provide some additional functionality that makes browsing large collections of information easier.

- Browsing with Previous/Next
- Browsing with the Table of Contents
- Browsing with the Hit List

Browsing with Previous/Next

Typically, each document page (and often, each contents and hit list page) contains next and previous buttons. The next button loads the next set of information from the infobase; the previous button loads the previous set.

Use these buttons to read through the available information.

Notice that the image changes when the cursor is placed over the button.

Browsing with the Table of Contents

Folio siteDirector builds a dynamically linked Table of Contents for each infobase. Headings listed in the Table of Contents window are linked to the corresponding information in the infobase.

The Table of Contents is a powerful tool for finding information quickly in the infobase. In order for you to be able to use it effectively, though, you must be familiar with the following processes:

- Linking from Headings
- Expanding & Collapsing Headings

Linking from Headings

Each heading in the Contents window is linked to the corresponding section in the infobase. These links are created automatically by siteDirector based upon the structure of the infobase.

To link from any heading (or any other line which may appear in the Table of Contents window):

1 Click the heading in the Contents view that you wish to link to.

•The document view should update to display the text of the infobase at the heading specified.

You may need to expand parts of the Table of Contents to find the heading you wish to link to.

Expanding & Collapsing Headings

Headings in the Table of Contents may have sub-headings beneath them. These sub-headings may be individually displayed or hidden (expanded or collapsed), depending on what you need to see.

To expand or collapse headings:

1 Click any plus (⊹) or minus (⊟) to expand or collapse the heading.

•A ⊹ indicates that the heading may be expanded.

•A ⊟ indicates that the heading may be collapsed.

•A ⊡ indicates that the level is fully expanded.

Browsing with the Hit List

After you perform a search on the infobase, Folio siteDirector generates a hit list. This hit list provides summary information about each hit, including where the hit is located in the infobase. Depending on how the infobase is set up and the type of query performed, the hit list may also display the relative rank of each hit.

Each entry in the hit list is linked to the corresponding text in the infobase. By scanning the hit list, you can quickly identify information that may be of use to you and then link to it.

Linking from the Hit List

The first column in the hit list is linked to the document text in the infobase. To link from the hit list to the document text:

1 Click the information in the Hit List view that you wish to link to.

•The document view should update to display the text of the infobase at the heading specified.

Searching Infobases

If you can't find it, you can't use it. Thankfully, Folio siteDirector is able to tap into the Folio search engine to help you locate the information you need.

This section will cover the topics listed below. Click on a link for a detailed discussion of a particular topic.

- Simple Queries — Steps for performing a simple query on one or more infobases. Simple queries do no require you to know any query syntax and return the most relevant hits.
- Advanced Queries — Steps for performing an advanced query on one or more infobases. Advanced queries require you to understand some of the Folio query syntax and returns the hits in the order that they appear in the infobase.

- Using Query Forms — Query forms provide one or more entry fields to help you locate information in an infobase. Usually, they mask the query syntax from you, allowing you to focus on what you want to find rather than the mechanics of finding it.
- Navigating Hits — Once you have completed your search, there are several ways to browse the information you have found.
- The Folio Query Syntax — Provides details on the portions of the Folio query syntax most often used with siteDirector.
- Query Display Options — Reviews the display options you may set after (or in the process) of performing a query.

Simple Queries

Simple queries are automatically ranked by relevance. The first hit is the most relevant and the last hit is the least relevant. (Relevance is determined using an industry-standard formula).

Results from a relevancy ranked search are displayed in relevant order in the Hit List. Following a link in the hit list takes you to the full text of the hit in the document view.

To perform a simple search using Folio siteDirector 4:

1 Click the Query button.
   •The Query form should appear.

2 Select one or more infobases to search in.
   •Click on a single infobase in the list to search a single infobase.
   •Hold down the CTRL key and click on additional infobases to search multiple infobases.

3 Enter the keywords you wish to search for.
   •Separate terms with spaces.
   •To search for an exact phrase, enclose the terms in double quotes (such as "the king and I").

4 Set any desired display options for the query.
   •See Query Display Options for more information.

5 Choose **Query** to submit the search.

After submitting the search, you are taken to one of two pages:

- A page containing a summary of the results of the query and a link to the document view for the infobase
- A page containing the first hit.

If you search multiple infobases, the first page gives you a chance to review the hit summaries and decide which infobase to view. The second option simply takes you to the first hit in the first queried infobase.

If necessary, select which infobase to view and then use the Next Hit and Previous Hit buttons to move through the search hits. See Navigating Hits for other ways of moving between search hits.

Advanced Queries

Advanced queries give you more control over your searches than simple queries do. However, they require that you understand some of the Folio Query Syntax. They also are not ranked; the hits are listed in the order that they appear in the infobase.

Advanced queries allow you to control how the search is evaluated. You can specify Boolean operators or proximity operators and use wildcards to expand what you are searching for.

To perform an advanced query search using Folio siteDirector 4:

1 Click the Advanced Query button.
   •The Advanced Query form should appear.

2 Select one or more infobases to search in.
   •Click on a single infobase in the list to search a single infobase.
   •Hold down the CTRL key and click on additional infobases to search multiple infobases.

3 Type the words you wish to search for, separated by a space or the appropriate operator.
   •You may search by keyword (not using any specific operators). For example:
      paragraph formatting options
   •You may search for an exact phrase. Enclose the phrase in quotation marks. For example:
      "to be or not to be"

•You may use Boolean operators (and, or, not, exclusive or). For example:

dog and cat

dog or cat

dog not cat

dog xor cat

•You may use wildcards (single character, multiple character, word form, synonym). For example:

wor?

work*

work%

work$

•You may use proximity operators to specify how close terms must be. For example:

"netscape infobase"/5

•If you wish to modify a previous query, click the Prev button next to the **Query For** box to display the previous query.

•Note that as you type, the Query dialog attempts to complete the word you are typing with a word contained in the infobase. If the word is correct, press the ENTER key and type the next term.

4   Set any desired display options for the query.

•See Query Display Options for more information.

5   Choose **Query** to submit the search.

•A page containing a summary of the results of the query and a link to the document view for the infobase

A page containing the first hit.

If you search multiple infobases, the first page gives you a chance to review the hit summaries and decide which infobase to view. The second option simply takes you to the first hit in the first queried infobase.

If necessary, select which infobase to view and then use the Next Hit and Previous Hit buttons to move through the search hits. See Navigating Hits for other ways of moving between search hits.

Using Query Forms

Many sites provide custom query forms to simplify searching for specific items. These forms typically ask you to fill in one or more fields on the form. Some fields may be required.

The site administrator should provide additional help information for complicated query forms. In general, the process for using a query form is:

1   Click on the Query Form button.

•The actual button used, and its name, will vary depending on the site.

•The query form should appear.

2   Fill in as many fields as necessary.

•Typically, the more fields you fill in, the more precise the search will be.

•You may be able to use various operators from the Folio Query Syntax.

3   Set any desired display options for the query.

•See Query Display Options for more information.

4   Choose **Query** to submit the search.

•A page containing a summary of the results of the query and a link to the document view for the infobase

•A page containing the first hit.

If you search multiple infobases, the first page gives you a chance to review the hit summaries and decide which infobase to view. The second option simply takes you to the first hit in the first queried infobase.

If necessary, select which infobase to view and then use the Next Hit and Previous Hit buttons to move through the search hits. See Navigating Hits for other ways of moving between search hits.

Navigating Hits

Once you have created and evaluated a query, you can view the search results in the infobase or infobases you've searched. Folio siteDirector gives you two ways to look at your search results — browsing , the Hit List, and Table of Contents.

Navigating Hits: Browsing

Search hits are highlighted with red arrow icons. For example: ▶Example Hit◀

Use the Next Hit and Previous Hit buttons to move from one page of hits to the next. (The Next and Previous buttons simply take you to the next page, which may or may not contain hits.)

Navigating Hits: Hit List

Use the Hit List view (if provided) to see a summary of the hits in the infobase. Usually, the heading where the hit is located is displayed, which gives you an idea of the context for the hit and helps you evaluate its importance.

The first column in the hit list is linked to the corresponding heading in the body of the infobase. Following the link usually displays a document view of the infobase, which you may then browse through using the Next Hit and Previous Hit buttons.

Navigating Hits: Table of Contents

Use the Table of Contents view to see the table of contents for the infobase. Some search forms allow you to set display options for the table of contents (including words around hits and query results). If these options are set, then you can quickly scan through the table of contents for the heading which contain the most hits (query results) or which have the right context (words around hits).

Each heading in the table of contents is linked to the corresponding heading in the body of the infobase. Following the link usually displays the document view of the infobase, which you may then browse through using the Next Hit and Previous Hit buttons.

For more information on how to use the Table of Contents, see Browsing With the Table of Contents.

The Folio Query Syntax

Folio siteDirector allows Web users to access the infobase search engine to perform full-text queries for the information they need — quickly and easily. The basic query constructions detailed here will enable you to search infobases (or groups of infobases) in a variety of ways.

Please note that the Folio query syntax is only for use with advanced queries. This syntax does not work with simple queries.

Also note that these syntax elements may be combined for different effects. Constructions may be grouped together using parentheses, if necessary.

Basic query constructions include:

- Keyword & Phrase Searches
- Boolean Operator Searches
- Wildcard Searches
- Proximity Searches

Keyword & Phrase Searches

Keyword and phrase searches are the most basic types of searches you can perform in Folio Views. They are the building blocks for all other types of searches.

A keyword search finds all records which contain the words you specify. Separate key words by spaces.

A phrase search finds all records which contain an exact phrase. The phrase you wish to find must be enclosed in quotes.

Keyword Searches

Type each word you wish to search for, separated by spaces, into the Advanced Query dialog.

Query	Explanation
cat	Finds all records which contain cat
cat dog	Finds all records which contain both cat and dog (in any order)
cat dog mouse	Finds all records which contain all three of the words cat, dog, and mouse (in any order)

Phrase

Type the phrase you wish to search for in full quotation marks.

Note that a phrase is considered to be a single term and may be used as a keyword (see the second example, below).

Also note that phrases may use wildcards. See Wildcard Searches for more information.

Query	Explanation
"to be or not to be"	Finds all records which contain the exact phrase "to be or not to be"
"president lincoln" assassination	Finds all records which contain both the exact phrase "president lincoln" and the word assassination. Note that this combines a phrase search and a keyword search.
"the great* debate"	Finds all records which contain phrases which match the pattern (such as "the great debate" or "the greatest debate").

Boolean Operator Searches (And, Or, Not, XOr)

The Boolean operators allow you to refine your queries to focus on more specific or more general information than may be found with a single word or phrase search.

Boolean operators require a word or phrase on either side of the operator. For example, **dog or cat** is a valid query, but **or cat** is not.

There are four Boolean operators: And, Or, Not, Exclusive Or. See Operator Precedence for a discussion of the precedence (order of execution) of these operators and how to override the precedence.

And

Use the And operator to search for multiple words in the same record (this is same as the multiple word search described in Simple Queries).

The And operator may be specified any one of three ways: a single space between words, the ampersand **&**, or the word **and**.

Query	Explanation
ham eggs ham & eggs ham and eggs	Finds all record which contain both ham and eggs
ham & eggs and "cold milk"	Finds all record which contain ham, eggs, and the phrase "cold milk"

Or

Use the Or operator to search for multiple words in the infobase (the words may or may not be in the same record).

The Or operator may be specified one of two ways: the pipe **|** or the word **or**.

Query	Explanation
me | you me or you	Finds all records which contain either me or you (may contain both)
me or you and him	Finds all records which contain him and either me or you (or both me and you). (See Operator Precedence for additional explanation on these results.)

Not

Use the Not operator to search for records which do not contain a particular term or set of terms. Not is actually a unary operator (it can be used by itself), but it is often used in between two terms (find records which contain A but not B).

Generally, the best way to think of the Not operator when used between two terms (A not B) is "find records with A and find records without B" (A and not B).

The Not operator may be specified one of two ways: the caret **^** or the word **not**.

Query	Explanation
dog ^ cat dog not cat	Finds all records which contain dog but which do not contain cat.

^ spinach not spinach	Finds all records which do not contain spinach. (In this type of query, nothing is highlighted. Next & Previous Hit take you to the next and previous records which do not contain the term.)

XOr (Exclusive Or)

Use the XOr operator to search for records which contain one of two words but not both.

The XOr operator may be specified one of two ways: the tilde ~ or the term **xor**.

Query	Explanation
john ~ smith john xor smith	Finds all records which contain either john or smith but which do not contain both john and smith.

Operator Precedence

The query operators have a precedence order. That is, when two more operators are used in a query, the results of one operator will be evaluated before another operator. Understanding the precedence — and how to override the precedence — can assist you in finding the information you need.

The operator precedence is:

Not, Or, XOr, And

If the same operators are used in a query (for example, if Or appears twice in a query), the operators are evaluated from left-to-right.

For example, consider the following query:

dog or cat and mouse not cheese

This query is evaluated in the following order:

1. not cheese (records which do not contain cheese)

2. dog or cat (records which contain either dog or cat)

3. and mouse (and all records in the identified subset which contain mouse).

These rules allow you to create powerful queries; however, they can also be confusing. To ensure the correct terms are combined with the correct operators, use parentheses around the terms and operators.

For example, the following queries all produce different results:

dog and (cat or mouse) not cheese

dog and cat or (mouse not cheese)

(dog and cat) or (mouse not cheese)

The following query is the same as the first query in the above list, but is more explicit:

(dog and (cat or mouse)) not cheese

Wildcard Searches

Wildcards allow you to find words using patterns for a set of words (replacing single or multiple characters) and to find synonyms or word forms of a word.

Note that wildcards may be used in phrase and proximity searches.

Note: Site administrators can deny wildcard and phrase searches on individual infobases. If the infobase is not optimized for these types of searches, then the search can significantly slow down siteDirector.

Single Character

Use the single character wildcard to replace any single character in a term. Note that this wildcard is a replacement wildcard — there must be a character in the wildcard position to register a hit.

Two or more single character wildcards may be used in the same term, if necessary.

The single character wildcard is the question mark **?**.

Query	Explanation
wom?n	Finds all terms which match the pattern (such as woman, women, or wom9n).
b??k	Finds all four letter words which start with b and end with k (such as book, bilk, or bark).
"the best advi?e"	Finds all phrases which match the pattern (such as "the best advise" or "the best advice").

Multiple Character

Use the multiple character wildcard to replace 0 or more characters in a term.

Two or more multiple character wildcards may be used in the same term, if necessary.

The multiple character wildcard is the asterisk (or star) *.

Query	Explanation
t*t	Finds all terms which start with a t and end with a t (such as tt, that, or trident).
work*	Finds all terms which start with the pattern work (such as work, worked, or workhorse).
*ed	Finds all terms which end in ed (such as worked, overloaded, or red).
"the great* debate"	Finds all records which contain phrases which match the pattern (such as "the great debate" or "the greatest debate").

Synonym (or Thesaurus)

Use the synonym (or thesaurus) wildcard to find synonyms of a term. Note that you cannot specify usage for the synonym; searching for synonyms of **address** could find both **location** ("What is your address?") and **speak** ("He addressed the audience").

The synonym wildcard is the dollar sign $. (Since the $ looks like an S, you can remember that it applies to Synonym searches.)

Note that the synonym wildcard must appear at the end of the term. The synonym wildcard may not be mixed with any other wildcards in the same term.

Query	Explanation
work$	Finds synonyms of the term work (such as toil, effort, or trade).
run$ run%	Finds synonyms of run and word forms of run (word forms are discussed below). Synonym examples include run, jog, or trot. Word stem examples include run or ran.

Word Form (or Stem)

Use the word form (or stem) wildcard to find forms of a term. Word forms are defined by the parts of speech — singular, plural, past tense, present tense, future tense, etc.

Note that you do not need to specify a root word to perform a word form search. A word form search on **long** (a root word) should produce the same results as a word form search on **longer**.

The word form wildcard is the percentage sign **%**.

Note that the word form wildcard must appear at the end of the term. The word form wildcard may not be mixed with any other wildcards in the same term.

Query	Explanation
work%	Finds word forms of the term work (such as work, works, or worked).
jump%	Finds word forms of the term jump (such as jump or jumped).
"one if by land%"	Finds phrases which begin with "one if by" and which end in word forms of land (such as land or landed).

Proximity Searches

Proximity searches allow you to specify how close two (or more) words must be to each other in the same record in order to register a hit.

You can specify either word proximity or record proximity searches.

Word Proximity

Word proximity allows you to specify a range that all terms in the proximity search must appear in. The terms must be contained in the same record.

Word proximity searches may be ordered or unordered.

When creating a word proximity search, you must specify a range for the search. All terms in the proximity must appear in the specified range. The first word from the proximity search that is found begins the count for the range.

For example, an ordered proximity search to find dog, cat, and rat within a 10 word range must find dog first. Dog counts as one word in the range. Both cat and rat must be found within the next nine words to register a hit. (In an unordered proximity, it would not matter which term was found first; the other two terms must be found within the next nine words.)

Note that wildcards may be used in phrase and proximity searches.

Ordered Proximity

Use ordered proximity to specify the order in which terms must appear within a given range to count as a hit. This is more restrictive than the unordered proximity search.

The ordered proximity operator is the forward slash /. Terms in an ordered proximity search must be enclosed in quotes.

As a side note, you may be interested to know that a phrase search is basically an ordered proximity search with a proximity equal to the number of terms in the phrase.

Query	Explanation
"franklin roosevelt"/5	Finds records which contain both franklin and roosevelt, in that order, within a five word range.
"me and my shadow"/10	Finds records which contain these four terms, in order, within a 10 word range.

Unordered Proximity

Use unordered proximity to specify a set of terms which must appear within a given range in any order.

The unordered proximity operator is the at symbol @. Terms in an unordered proximity search must be enclosed in quotes.

Query	Explanation
"trick treat halloween"@14	Finds records which contain all three terms, in any order, within a 14 word range.
"work* fire$"/25	Finds records with contain terms which start with work and synonyms of the term fire within 25 words of each other.

Record Proximity

Record proximity allows you to specify the maximum number of records between terms. For example, you could perform a record proximity search for the terms Smith, Wesson, and revolver within a 5 record range. All three terms must appear within a five contiguous record set to count as a hit.

The record proximity operator is the pound sign (or hash mark) #. Terms in a record proximity search must be enclosed in quotes.

Query	Explanation
"jones smith theft deny"#3	Finds records which contain these terms within a 3 record range (this search might be used when searching a deposition with question and answer pairs).

| "franklin lightning kite curly hair"#10 | Finds records which contain these terms within a 10 record range. |

Query Display Options

The query display options are usually available from one of the query forms (query, advanced query, or custom query form) or from an intermediate query summary page. These options allow you to control the display of information in the document, hit list, or contents views.

Document View

Records with Hits — This option displays only those records which contain query hits. Use this feature to quickly scan through the hits; there may also be a button available to expand the view to show the records in context (this option is up to the site developer).

Contents View

Heading with Hits — Displays only headings which have hits. Use this to get a quick snapshot of the relevant headings in the table of contents.

Query Results — Displays the number of hits in each heading next to the heading. Use this information to help you identify the sections which are most relevant to your search. Also called Hits per Heading.

Words Around Hits — Displays a specified number of words around each hit in the table of contents. Use this option to view the text of the hits in partial context. Usually, you must specify the number of words around the hits; valid values are 2 - 9.

Hit List View

Words Around Hits — Displays a specified number of words around each hit in the hit list. Use this option to view the text of the hits in partial context. Usually, you must specify the number of words around the hits; valid values are 2 - 9.