

# Folio Overview

*Folios* store multiple texts, called *Passages*, that can be brought into documents manually with the *Fetch* command or into forms automatically with the *Fetcher* command.

















A Folio could contain:

- Boilerplate paragraphs or pages
- Biographies
- Parts lists
- Jury instructions, interrogatories
- Letterheads, captions

Consider using Folios if:

















- You use standardized blocks of text (which may include graphics, formatting, footnotes, hyperlinks, etc.) in multiple forms.
- You want to create a library of information that can be searched and selected for insertion at any point in any document.
- You want to create forms that intelligently select and insert blocks of external text. Decisions made by the form can be based responses to questions in the Q&A Table combined with internal logic.



## Folio Basics



🔧 Authors		✍ Users	
<b>Create a Folio</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Use the <b>Folios</b> command to create a Folio and add Passages	<b>Fetch a Passage</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Use <b>Fetch</b> to insert a Passage in any document
<b>Tag Passages</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Each Passage in a Folio can be marked with one or more Tags	<b>Find a Passage</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Use Tags and full-text searching to find Passages
<b>A form where the user selects Passages</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Use <b>Smart Answers</b> and <b>Fetchers</b> to insert Passages selected by the form user	<b>Answer a “Fetch” question - Passages</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Click <b>Fetch</b> to respond to Fetch questions that ask for Passages
<b>A form where the user selects a Tag</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Use <b>Smart Answers</b> and <b>Fetchers</b> to insert Passages marked with a Tag selected by the form user	<b>Answer a “Fetch” question - Tag</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Click <b>Fetch</b> to respond to Fetch questions that ask for a Tag

# Advanced Folios

 Authors

<b>Passages in Lists</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Use Lists to arrange fetched Passages
<b>Folio Facts</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Passages may include supplemental info
<b>Folio Facts in Lists</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Include extra info about fetched Passages
<b>Folios in Derived Answers</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	A trick to use Lists with Passages that are selected by Tag
<b>Advanced Folio editing</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Speed up extensive Folio revisions
<b>Q&amp;A Tables in Folios</b>  <a href="#">Walkthrough</a>  <a href="#">Video</a>	Passages can include form automation
<b>Import and export Folios</b>  <a href="#">Lesson</a>	Downloaded or emailed Folio documents need to be imported
<b>Folios screen details</b>  <a href="#">Lesson</a>	Find out what all those little buttons do
<b>Smart Answer screen details for Folios</b>  <a href="#">Lesson</a>	Find out what all those little buttons do
<b>Fetcher screen details</b>  <a href="#">Lesson</a>	Find out what all those little buttons do

<b>Folios and styles</b>  <a href="#">Lesson</a>	 Users Make styles in Folios and target forms agree
--	---

<b>Fetch screen details</b>  <a href="#">Lesson</a>	 Authors & Users Find out what all those little buttons do
---	--