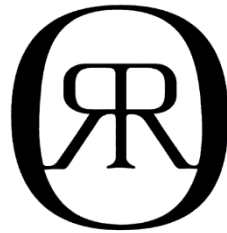


**ROBERT'S RULES OF ORDER**  
**NEWLY REVISED**  
**12TH EDITION**



**QUICK REFERENCE GUIDE**

QUICK REFERENCE GUIDE

ROBERT'S RULES OF ORDER NEWLY REVISED

12<sup>TH</sup> EDITION

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## Introduction

Welcome to **Robert's Rules of Order Newly Revised on CD-ROM** using Folio Views®. This guide is designed to help you get started with Folio Views (the search-and-retrieval program you will use to access **Robert's Rules of Order Newly Revised**) as quickly as possible. The Folio Views version of **Robert's Rules of Order Newly Revised** (known as a Folio *infobase*) is a full-featured information database which allows you to browse, search, annotate, customize, print, and copy information to your word processor.

This Quick Reference Guide will lead you through the installation process and acquaint you with the basic functions of Folio Views. The guide is not comprehensive; it is intended to show you the relevant major features of Folio. For more detailed information on any of the features mentioned in this guide, please open the **Help Infobase** (see inset on this page). After reading this guide, you may also want to begin browsing the *Help Infobase* by selecting the **Help** menu and then selecting **Overview**.

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

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## Technical Support

If you need additional assistance with the **Robert's Rules of Order Newly Revised CD-ROM**, please contact American Legal Publishing Corporation by telephone at (800) 445-5588 or by e-mail at [techsupport@amlegal.com](mailto:techsupport@amlegal.com). Technical support is available between 8:30 a.m. and 5:00 p.m., Eastern Time, Monday through Friday.

## About Folio Views®

**Folio Views** is a full-text search-and-retrieval program that offers *instant access* to information. With Folio Views you can search for words, phrases, rule numbers – anything you want! Folio provides an easy-to-use electronic table of contents and hypertext linking capabilities to allow you to browse and navigate information. Folio also allows you to *customize* or *personalize* information with electronic notes, bookmarks, and highlighters.

## Included in This Release

The product disk contains the following:

- Installation setup files
- “User Guide” folder containing this guide
- “Ancillary Materials” folder containing copies of the bonus ancillary material described below

After the product is installed, the following resources will be available within the Folio Views software:

- *Robert’s Rules of Order Newly Revised, 12<sup>th</sup> Edition.*  
*This is the main infobase; it provides links to all the other resources as well.*
- *Robert’s Rules of Order Newly Revised In Brief, 3<sup>rd</sup> Edition*  
*Full text of the In Brief book, with hyperlinked references to the 12<sup>th</sup> Edition*
- Bonus ancillary material, in PDF and Folio Views formats:
  - Forms - Motion, Roll Call, Meeting Notice (9 pages)  
*Motion form and instructions, step-by-step summary of roll-call voting procedures, roll-call vote form with example, and forms for regular-meeting and special-meeting notices*
  - Timekeepers’ Guide (17 pages)  
*Explanation of timekeepers’ tasks and related rules, forms, checklists, and time cards*
  - Ballot Voting (15 pages)  
*Reviews and summaries of ballot-related rules plus checklists for conducting and tallying ballot votes, sample ballots, and Tellers’ Report forms with examples*
  - Understanding Secondary Amendments (11 pages)  
*Description of how to use secondary amendments and the basic rules governing them, presented in the style of the In Brief book*
  - Summary of Rules Governing Preference in Recognition (4 pages)  
*Abbreviated quick-reference list of who is entitled to claim preference in recognition when more than one member seeks to obtain the floor, plus table of motions which are in order when another has the floor*
  - Tellers’ Report Form - Election (Interactive PDF)  
*(PDF only) Open this in Adobe Acrobat or Adobe Acrobat Reader to create a Tellers’ Report by listing the candidates and number of votes received by each. The number of votes cast and the number required for a majority will be calculated automatically.*

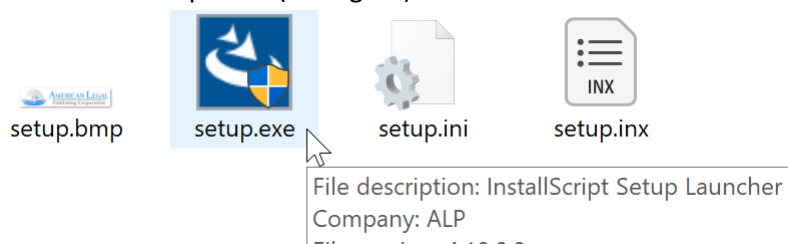
If you wish to have access to the PDF resources without opening the *Robert’s Rules of Order Newly Revised* program, you can use Windows to copy the “Ancillary Materials” and “User Guide” folders from the installation disk to a local drive on your PC. *Note: These files are part of the CD-ROM edition and may not be distributed for use by others.*

## Installation

**To install this product, the user must be logged on to Windows from an Administrator account or use “Run as Administrator” when installing.** You may be prompted to allow the installation of required Microsoft Visual C++ packages before the rest of the setup begins. When prompted, click “Install” to complete this step.

### Single-User Installation

1. Insert the product disk into the appropriate drive or port. Depending on your computer’s configuration, the setup program may begin automatically and you can continue with Step 2. If it doesn’t, use your computer to find and run the **setup.exe** program by doing any of the following:
  - If you know the drive letter of the installation disk, open **D:\setup.exe** (where **D:** is the drive letter) by typing into the Windows search box near the Start button (or on the Start button menu) or using the Windows **Run** command (press **⊞ + R**)\*.
  - The installation-drive folder may have already opened when the disk was inserted; if not, open it from File Explorer (or Windows Explorer) or the “This PC” (or “Computer”) window. Then open the **setup.exe** icon. Note: There is more than one icon with the name “setup”. Be sure to choose the one with the “.exe” extension. If file name extensions are hidden, choose the one with the InstallScript icon (see figure).



2. On the License Agreement dialog box, please read and accept the terms of the license agreement.
3. On the Setup Type dialog box, choose “Single User Install” from the list.
4. On the Choose Destination Location dialog box, confirm the default folder or press “Browse” to specify a different one. If installing to a folder with other contents, be sure to specify a subfolder, such as **\rrules12**, as the destination.
  - The default folder is set to “C:\rrules12”.
5. On the Select Program Folder dialog box, you may change the program folder name.
6. Once the installation is complete, access **Robert’s Rules of Order Newly Revised 12<sup>th</sup> Edition** through the desktop icon that is created or from the list on the Start button menu.

### Network Installation

#### Part I – Initial File Placement

- 1–2. Do steps 1–2 of the Single-User Installation instructions (above).
3. On the Setup Type dialog box, choose “Network Install” from the list.

---

\* The “+” notation in keyboard-shortcut instructions means to press and hold the first key(s) while pressing the last key.

4. On the Choose Destination Location dialog box, press “Browse” to designate a network drive and folder as a destination for the shared files.
  - Once you click the “Next” button, Folio Views program files will be installed to the specified network folder.

#### *Part II – End User Creation*

1. From the desktop of each end user, run the **setup.exe** program in the folder entered in Step 4 of the Initial File Placement instructions above.
2. Follow the on-screen instructions to install the system files to each workstation computer. On the Choose Destination Location screen, confirm the default folder or press “Browse” to specify a different one.
  - Computers with a 64-bit version of Windows should install as a subfolder under the “Program Files (x86)” folder
3. Once the end user’s installation is complete, **Robert’s Rules of Order Newly Revised 12<sup>th</sup> Edition** can be accessed through the desktop icon or from the list on the Start button menu.

### Opening the *Robert’s Rules of Order Newly Revised* Infobase

The installation program automatically creates a **Robert’s Rules of Order Newly Revised 12<sup>th</sup> Edition** folder on the programs menu, as well as a **Robert’s Rules of Order Newly Revised 12<sup>th</sup> Edition** icon on your desktop. To open Folio Views, select and open the icon from either location.

### Instructions for Users of *Robert’s Rules of Order Newly Revised 11<sup>th</sup> Edition*

Users who previously purchased and installed the *Robert’s Rules of Order Newly Revised 11<sup>th</sup> Edition* CD-ROM can retain the existing installation and also install the 12<sup>th</sup> Edition. Each product can then be opened and run separately; however, some settings are shared, and the initial menu and toolbar layouts will be as in the 11<sup>th</sup> Edition. If you want to match the appearance of a freshly installed 12<sup>th</sup> Edition, open the 12<sup>th</sup> Edition and follow the steps below; these changes will also affect the 11<sup>th</sup> Edition.

Step 1 To reset the menus, choose **File | Customize | Menus | Reset All | OK**.

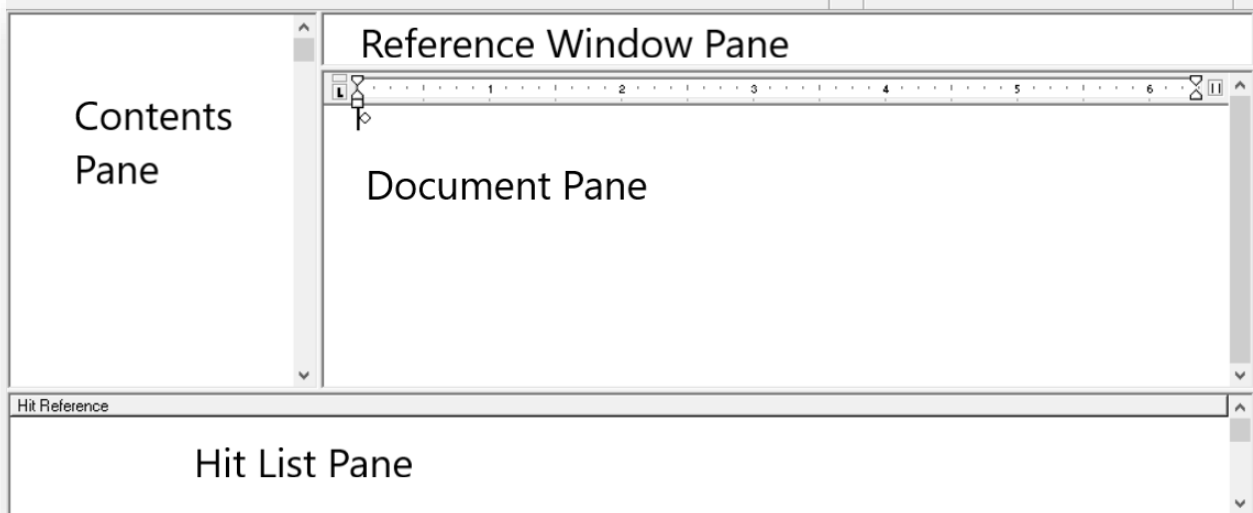
Step 2 To move the search-related toolbars to the bottom of the window, click inside the border area of the Search toolbar (but not on any button) and drag the toolbar to the desired area directly below the set of infobase view tabs. Do the same for the toolbar containing the Previous Hit and Next Hit buttons, placing it alongside the Search toolbar.

Step 3 To include all of the standard bottom toolbar buttons, follow the instructions in the “Customizing the Toolbars” topic of this guide (pp. 20–21) to add any missing buttons. The default bottom toolbar buttons are: Advanced Query, Query Selection, Clear Query, Show/Hide Hit Highlighting, and Query Tool (all from the Search category) and Previous Hit, Next Hit, Previous Partition Hit, and Next Partition Hit (from the Navigate category).

Step 4 Continue customizing the toolbars by adding the Show History button (from the Navigate category) to the top toolbar.

## Infobase Views

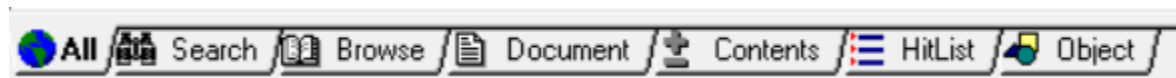
A *view* is a way of looking at information. Depending on what you are doing in an infobase, you may need to look at the information in different ways. To facilitate this, Folio Views provides seven different views of an infobase. Each view may contain a combination of the window panes shown below.



### Changing the View

To change the view of the infobase:

Step 1 Identify the *Infobase View Tabs* on your screen



These tabs are located below the document pane when an infobase is open.

- There are seven different infobase view tabs: *All*, *Search*, *Browse*, *Document*, *Contents*, *HitList*, and *Object*.

Step 2 Select the tab corresponding to the view of the infobase you wish to use.

- Click the appropriate tab to choose a viewing option or press **F7** to switch to the next view; please experiment to find the view you like best.
- For detailed information about the different views, please access the *Folio Help Infobase* by pressing **F1**.

Step 3 Using the mouse, drag the dividers separating the various panes if you wish to change the amount of screen space occupied by each, or drag the program window borders to change the size of the entire window.



- Lines of text in the Document pane automatically reflow and wrap to fill the pane as the size of the pane or the magnification level of the text is changed. For charts and tables that are not reflowable, use the left and right arrow keys to scroll through the text or drag the horizontal scroll bar at the bottom of the window to move the content left or right within the pane. The horizontal scroll bar can be enabled in the menus via **Tools | Options | Document | Horizontal scroll bar**. The setting will be remembered for future sessions of Folio Views.

### Changing the Magnification Level

To set the zoom level for all text panes, select the **View** menu and select **Zoom**. In the Zoom dialog, select or type the zoom percentage you wish to use and choose **OK**.

To zoom the contents of a particular window pane, first position the mouse pointer over that pane. Then hold down the **CTRL** key on the keyboard while scrolling the mouse wheel up (to increase zoom) or down (to decrease zoom).

### Switching Panes

To change the focus to a different pane using the keyboard, press **F8** to move to the next pane (clockwise) or **SHIFT + F8** to move to the previous pane (counterclockwise).

### Table of Contents

The Contents pane is a valuable tool for quickly moving around an infobase. An infobase table of contents is expandable and collapsible, so you can see as much or as little information as you need. A plus sign (+) next to an entry indicates that the entry can be expanded to show subordinate levels. A minus sign (–) indicates that the entry cannot be expanded further, but may be collapsed.

Every entry in the table of contents is linked automatically to the appropriate section in the Document pane. Double-click on an entry (or select it and press **ENTER**) and you are automatically taken to that place in the infobase.

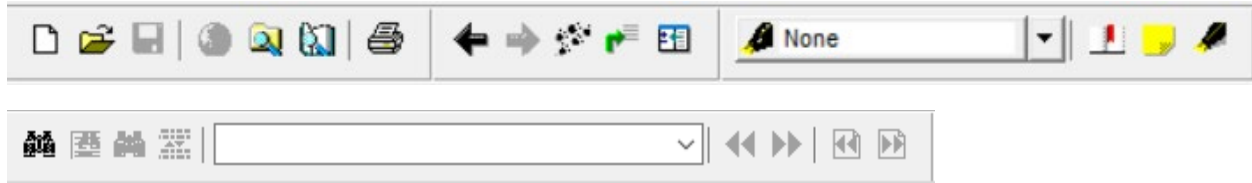
The Contents pane is displayed when the *All*, *Browse*, or *Contents* views are selected. Clicking inside the Contents pane when it is displayed (or pressing **CTRL + SHIFT + C**) will move the focus to the Contents pane so that it is active.

When first opened, the table of contents displays only the headings at the highest level (Chapter or Part). To show or hide lower-level headings:

- Click a plus sign (+) to expand one level in a branch of the table of contents (or select a heading and press the + key on the numeric keypad or **SHIFT + +** on the main keyboard).
- Click a minus sign (–) to collapse a branch of the table of contents (or select a heading and press the – key).
- Select a branch heading and use the **View** menu's **Expand Branch** command (or press the \* key).
- Use the **View** menu's **Expand All** or **Expand to level...** commands.
- Press a key from **1** through **9** to collapse or expand all branches to the desired depth, where **1** corresponds to collapsing all.

## Toolbars

The toolbars at the top and bottom of the screen allow you to access the most commonly used features in Folio Views. The figures below illustrate some of the features explained in this Quick Reference Guide.



## Viewing Page Numbers

In this edition of the *Robert's Rules of Order Newly Revised* CD-ROM, page number references corresponding to the printed books have been hidden so as not to interfere with text flow and searching. To display the page numbers, go to **Tools | Options** and select the **Document** tab. Then turn on **Formatting codes** and then **Jump destinations** and choose **OK**.

**I** A red line will appear to the left of words. Words with this mark correspond to the first word on a page in the printed book. Hover the mouse pointer on the red line to reveal the page number, as shown in the figure below. (The same type of mark is also shown to the left of other navigation targets, such as paragraph numbers.)

**I**9:26 → **Rules Relating to the Secrecy of an Executive Session.** The general rule is that anything that occurs in executive session may not be divulged to nonmembers (except any entitled to attend). However, action taken, as distinct from that which was said in debate, may be divulged to the extent—and only to the extent—necessary to carry it out. For example, if during executive session a member is expelled or an officer is removed from office, that fact may be disclosed to the extent described in **63:3**. If the assembly wishes to further lift the secrecy of action taken in an executive session, it may adopt a motion to do so, which is a motion to *Amend Something Previously Adopted* (**35**). In making or debating such a motion, the members must be careful, if the assembly is not in executive session, to preserve the existing secrecy. ◇

**I**9:27 → A member of a society can be punished under disciplinary procedure if he violates the secrecy of an executive session. **I**Anyone else permitted to be present is honor-bound not to divulge anything that occurs **p.88**. Reading and approval of the minutes of an executive session must take place only in executive session, unless that which would be reported in the minutes is not secret. When the minutes of an executive session must be considered for approval at an executive session held solely for that purpose, the brief minutes of the latter meeting are, or are assumed to be, approved by that meeting. (For additional rules regarding access to minutes and other records, including those kept by boards and committees, that are protected by the secrecy of an executive session, see **47:36** and **49:17–19**.) ◇

## Links

Hypertext links connect related pieces of information. Links may start from a section of text and end anywhere – another section of text, a graphic, a popup note, another infobase, or even a PDF document. Links are identified in an infobase by colored text.

The *Robert's Rules of Order Newly Revised* infobases contain two types of internal hypertext links:

- **Jump links** (blue text) will immediately take you from one point in the infobase to another point in the infobase. Jump links allow you to “jump to” or access referenced text such as paragraph references (“see 56:66”).
- **Popup links** (red superscript numbers) will open a separate “popup” window so you can view footnotes.

#### To activate or follow a link:

Step 1 Move the mouse cursor over the link so that the mouse cursor becomes a small hand (or use the arrow keys on the keyboard to move adjacent to or inside the link text).

Step 2 Single-click (or press **CTRL + ENTER**).

#### To return from a link:

Click on the **Go Back** button (single arrow) at the top of the screen (or press **F6**) to return to your previous location after following a link.

## Jumping to a Paragraph, Page, Section, or Chapter Number

When you follow a link, you are actually taken to the built-in jump destination associated with that link. You can also go directly to such destinations by entering the destination name into the *Go To* dialog:

Step 1 Select **Go To** from the **Search** menu (or press **CTRL + G**). The *Go To* dialog appears with a list of possible destinations. The *Jump destination Go to:* field is already highlighted, with §1 filled in.

Step 2 Click in the **Go to:** field to edit the section number, or immediately start typing a different destination name to overwrite it. You can also scroll through the destination list. The most common destinations are paragraph, page, section, and chapter numbers. For example:

- §13
- 12:67
- p.642 Note: No space between . and page numbers
- p.t34
- Chapter V
- Chart I
- Table II

Step 3 Click the **Go To** button (or press **ENTER**). The text cursor will now be located at the specified jump destination.

## Searching

Although the extensive indexes in *Robert's Rules of Order Newly Revised* and *Robert's Rules of Order Newly Revised In Brief* have been designed to quickly point you to relevant information throughout each work, there will still be times when you want to search the full text for specific words, phrases, or other combinations of terms. With the powerful search features built into Folio Views, you can easily search

the complete infobase. Basic information on searching is given below. Please see the *Help Infobase* for more detailed information.

## Basic Search Concepts

To understand how searches work, first note the following:

- The internal search index used by the Folio Views infobase treats all alphabetic characters as lowercase, regardless of how they appear in the text. You don't need to type anything in uppercase when searching. In the *Advanced Query* dialog (described in these instructions), search terms will always be displayed in lowercase.
- Punctuation marks (commas, periods, hyphens, dashes, colons, slashes, parentheses, etc.) are generally ignored (treated as spaces) and cannot be specifically searched for. Limited exceptions exist for particular forms within a word or number, such as in 1,253.25, don't, '2/3', and A.M. For details, see the "What is a Term" topic in the *Help Infobase*. Apostrophes are recognized within a word (e.g., officer's) but ignored at the end of a word (e.g., officers').
- Use surrounding quotation marks to search for terms such as "e-mail", "and/or", "self-explanatory", and "two-thirds". Inside the quoted phrase, you can type the symbol or substitute a space as you prefer. The results will be the same either way and will include all forms of the phrase (whether hyphenated or spaced).
- When searching for phrases or other combinations of terms, the results depend on what can be found within each "record" of the infobase text. For example, searching for committee\* not "of the whole" will find all records that include a word beginning with the letters "committee" except where the same record also contains the phrase "of the whole". (Details of the search query syntax are explained in Step 4 below.) A record generally consists of one paragraph of text as displayed in the document window, so a single numbered paragraph of the text may be spread across several records—for example, when it contains a list or subparagraphs.
- To jump to a specific location by its paragraph, page, section, or chapter number, use the Go To feature, as described in this guide, instead of performing a search.

## Performing Searches

Step 1 (Optional) If you want to limit the search to specific branches of the infobase, select the desired branches.

- To select branches, expand the branches in the Contents pane to display the ones you wish to select; then click in the checkbox next to each desired heading.
- To deselect all currently selected branches, choose **Clear All Checks** from the **View** menu.

Step 2 From the **Search** menu, choose **Advanced Query**.

- You can also access the Advanced Query dialog by pressing **F2** on the keyboard or clicking the Advanced Query tool (the left binoculars button) on the toolbar at the bottom of the screen.

Step 3 If specific branches of the infobase have been selected and you wish to limit the search to those branches, leave the **Checked branches** box enabled (checked square). To search the entire infobase, make sure the **Checked branches** box is disabled (blank square).

Step 4 Input your search query into the dialog. As you construct a query, the *Word list* and *Records with hits* areas of the dialog are instantly updated to reflect the words or combinations that will be found when the search is performed. To construct the query, use one or more of the following techniques:

- To recall a search query made earlier in the session (since the current infobase was opened), click the **Prev** button. After **Prev** is clicked several times, the **Next** button becomes available to recall the more-recent queries. (Note: If you want to always recall the last-performed query as soon as the dialog is opened, this can be enabled in the menus via **Tools | Options | Query | Previous query in query dialog.**)
- Start typing a word to search for. As you type, the dialog attempts to complete the word you are typing with a word contained in the infobase. If the word is correct, you can press the **ENTER** key to accept it.
- Scroll through the word list and select a word you wish to search for. Double-click to enter it into the query.
- Input multiple words, separated by a space between words. A space is equivalent to the *and* operator. The order of the words does not matter when outside of quotation marks.
- Search for an exact phrase by enclosing the phrase in quotation marks; for example: "point of order". Within a quoted phrase, the order and contiguity of words do matter. Words within the phrase may contain wildcard operators (as described below).
- Use the **and**, **or**, **not**, **xor** (exclusive or) search operators (known as Boolean searching) with your search terms to limit or expand the search. Synonyms for these operator names are, respectively, the symbols **&**, **|**, **^**, **~**. To search for one of these operator names as a word rather than using it as an operator, either use single quotes around it ('and', 'or', 'not', 'xor') or include it within a double-quoted phrase. To control the precedence of operators, group items using parentheses ( ).
- Use wildcard operators to match a set of words that fit a pattern:

Wildcard type	Operator	Position	Example	Matches (RONR 12)
Single Character (exactly 1)	?	any	??a	sea, via, yea
Multiple Character (0 or more)	*	any	*air*n	chairman, chairmen, chairperson
Word Form	%	end	apply%	apply, applies, applied, applying
Thesaurus Synonym	\$	end	young\$	young, inexperienced

Note: The % (*Word Form*) wildcard operator finds certain variations in grammatical form, including changes in tense (*has/have/had/having*, *wait/waits/waiting*), number (*city/cities*, *president/presidents*), and degree (*good/better/best*, *clear/clearer*). It does **not** find different noun or pronoun cases (*she/her*, *president/president's*) or derivative forms (*abstain/abstention*, *clear/clearly*). Depending on the word being sought, you may want to use a term that uses the \* operator together with, or instead of, a term that uses the % operator.

- Use proximity operators to specify how close (within how many words or records) terms must be to each other. You may include words that contain wildcard operators. Although the terms

used with proximity operators must be enclosed in quotes, the search is not limited to exact phrases:

Proximity type	Operator	Example	Matches (RONR 12)
Ordered word proximity	/	"question of privilege"/5	question of privilege, question is one of privilege
Unordered word proximity	@	"dilatory motion"@3	dilatory motion, motion is dilatory
Record proximity (unordered)	#	"standard descriptive rescind"#2	[8 records with hits]

- Click on the **left bracket** button to search in a highlighter, note, popup, field, group, or level. See the “Searching a Sub-set of the Infobase” and “Advanced Query Constructions” topics in the *Help Infobase* for more information about such scoped searches.

Step 5 Choose **OK** (or press **ENTER**).

Step 6 Use the **Next Hit** and **Previous Hit** buttons to view hits throughout the infobase.

- Use the **Next Hit** button (the double arrows point to the right) on the bottom toolbar (or press **F4**) to move forward one hit at a time.
- Use the **Previous Hit** button (the double arrows point to the left) on the bottom toolbar (or press **SHIFT + F4**) to move backwards one hit at a time.

Step 7 To begin a new search, choose **Clear Query** from the **Search** menu, and repeat steps (1) through (6) above.

- You can also click the **Clear Query** button (the binoculars crossed out with an “X”) on the bottom toolbar; or
- You can use the **Go Back** button (single arrow) on the top toolbar (or press **F6**) to return to the point in the infobase where you initiated the search.

---

*Note: For detailed information on searching, please open the **Advanced Query** dialog (as explained above) and click on the **Help** button. The *Help Infobase* will open automatically to the section on searching.*

---

### Using the Search Feature and the Table of Contents Feature Together

After you have performed a search, you can click on the *Browse* document viewing tab or the *Contents* document viewing tab at the bottom of the screen to see the number of search hits in the table of contents pane.

This feature must be enabled in the menus via **Tools | Options | Contents | Query results**. The setting will be remembered for future sessions of Folio Views.

As shown in the figure below, the number of search hits under each heading is displayed to the left of that heading. In this example, the figure illustrates a search for the phrase "out of order" (containing 61 total hits). Branches that are collapsed show the total number of hits within the branch; expand the branch to show the hits at lower levels. Double-click on any heading to jump to the corresponding location in the Document pane, where the search hits will be highlighted.

	<input type="checkbox"/>	ROBERT'S RULES OF ORDER NEWLY REVISED 12TH EDITION
	<input type="checkbox"/>	DEDICATION AND EPIGRAPH
	<input type="checkbox"/>	THE EDITIONS OF THIS MANUAL
	<input type="checkbox"/>	CITE THIS BOOK
	<input type="checkbox"/>	SECTION AND PARAGRAPH NUMBERING
	<input type="checkbox"/>	ABBREVIATIONS IN THIS BOOK
1	<input checked="" type="checkbox"/>	<b>CONTENTS</b>
	<input type="checkbox"/>	PREFACE to the Twelfth Edition
	<input checked="" type="checkbox"/>	INTRODUCTION
	<input type="checkbox"/>	PRINCIPLES UNDERLYING PARLIAMENTARY LAW
	<input checked="" type="checkbox"/>	CHAPTER I THE DELIBERATIVE ASSEMBLY: ITS TYPES AND THEIR RULES
2	<input checked="" type="checkbox"/>	CHAPTER II THE CONDUCT OF BUSINESS IN A DELIBERATIVE ASSEMBLY
2	<input checked="" type="checkbox"/>	CHAPTER III DESCRIPTION OF MOTIONS IN ALL CLASSIFICATIONS
	<input checked="" type="checkbox"/>	CHAPTER IV MEETING AND SESSION
3	<input checked="" type="checkbox"/>	CHAPTER V THE MAIN MOTION
9	<input checked="" type="checkbox"/>	CHAPTER VI SUBSIDIARY MOTIONS
4	<input checked="" type="checkbox"/>	CHAPTER VII PRIVILEGED MOTIONS
6	<input checked="" type="checkbox"/>	CHAPTER VIII INCIDENTAL MOTIONS
5	<input checked="" type="checkbox"/>	CHAPTER IX MOTIONS THAT BRING A QUESTION AGAIN BEFORE THE ASSEMBLY
	<input checked="" type="checkbox"/>	CHAPTER X RENEWAL OF MOTIONS; DILATORY AND IMPROPER MOTIONS
2	<input checked="" type="checkbox"/>	CHAPTER XI QUORUM; ORDER OF BUSINESS AND RELATED CONCEPTS
1	<input checked="" type="checkbox"/>	CHAPTER XII ASSIGNMENT OF THE FLOOR; DEBATE
	<input checked="" type="checkbox"/>	CHAPTER XIII VOTING
	<input checked="" type="checkbox"/>	CHAPTER XIV NOMINATIONS AND ELECTIONS
	<input checked="" type="checkbox"/>	CHAPTER XV OFFICERS; MINUTES AND OFFICERS' REPORTS
	<input checked="" type="checkbox"/>	CHAPTER XVI BOARDS AND COMMITTEES
	<input checked="" type="checkbox"/>	CHAPTER XVII MASS MEETINGS; ORGANIZATION OF A PERMANENT SOCIETY
	<input checked="" type="checkbox"/>	CHAPTER XVIII BYLAWS
	<input checked="" type="checkbox"/>	CHAPTER XIX CONVENTIONS
3	<input checked="" type="checkbox"/>	CHAPTER XX DISCIPLINARY PROCEDURES
3	<input checked="" type="checkbox"/>	CHARTS, TABLES, AND LISTS
	<input checked="" type="checkbox"/>	APPENDIX
20	<input checked="" type="checkbox"/>	INDEX

## Query Templates

A query template is a *custom-designed* search screen that allows you to search for specific pieces of information in an infobase. Query templates are designed to simplify the search process by hiding some of the complexity of the Folio Views search syntax.

### Using the *Robert's Rules of Order Newly Revised* Query Templates

The *Robert's Rules of Order Newly Revised* infobase contains two query templates:

- The **Chapter Searches** template allows you to search for information in a specific chapter of the publication.
- The **Search Index Only** template allows you to search the index.

To use any template:

Step 1 Select the **Search** menu.

- Available query templates appear at the bottom of the menu.

Step 2 Select the query template you wish to use.

---

*Note: You can also activate a query template directly using a keyboard shortcut. Press **CTRL + 1** for the Chapter Searches template or **CTRL + 2** for the Search Index Only template.*

---

Step 3 Follow the instructions on the query template dialog and type the word or words you wish to find.

Step 4 Choose **OK** to view the search results.

## Printing

### Printing Small Portions of Text

To print a portion of *Robert's Rules of Order Newly Revised*:

Step 1 Select the records you wish to print:

- *Using the mouse*, move your cursor to the beginning of the text you wish to print, press the left mouse button, and (without releasing the mouse button) move the cursor to the end of the text you wish to print.
- *Using the keyboard*, scroll to the beginning of the text you wish to print, press the **SHIFT** key, and (without releasing the **SHIFT** key) use the arrow keys to move.

Step 2 Choose **Print** from the **File** menu (or press **CTRL + P**).

Step 3 Choose **OK** or press **ENTER**.

- The selected text will be printed.

### Printing Larger Portions of Text

To print a larger portion of *Robert's Rules of Order Newly Revised* (such as a chapter or section of the publication):

Step 1 Choose **Print** from the **File** menu (or press **CTRL + P**).

Step 2 Select the **Section** option on the **Print Document** tab.

Step 3 Choose the item (chapter, section, etc.) you wish to print.

- Using the table of contents that appears in the **Print Document** tab, expand or collapse the headings to find the specific item you wish to print.
- Select the item by clicking on the checkbox.

Step 4 Choose **OK** or press **ENTER**.

- The selected text will be printed.



## Copying and Pasting

With Folio Views, you can use the standard Microsoft Windows clipboard feature to copy and paste small portions of text to your word processor for ready reference. To use the standard Windows clipboard functions:

Step 1 Select the information you wish to copy.

- *Using the mouse*, move your cursor to the beginning of the text you wish to print, press the left mouse button, and (without releasing the mouse button) move the cursor to the end of the text you wish to copy.
- *Using the keyboard*, scroll to the beginning of the text you wish to print, press the **SHIFT** key, and (without releasing the **SHIFT** key) use the arrow keys to move.

Step 2 Choose the **Copy** feature from the **Edit** menu.

- The Copy feature makes a copy of the information in the infobase and places it in the clipboard.
- You can also press **CTRL + C** on your keyboard to copy text.
- You can also use the right mouse button menu to copy highlighted material.

Step 3 Place the insertion point at the location in your word processor where you wish to paste the text.

Step 4 Use the **Paste** feature in your word processor.

- You can also press **CTRL + V** on your keyboard to paste the copied material.
- You can also use the right mouse button menu to paste the copied material.

## Shadow Files

The next sections of this Quick Reference Guide deal with Folio's *personalization* features. These features (notes, bookmarks, and highlighters) allow you to add your own unique comments, mark your place, or highlight information in the ***Robert's Rules of Order Newly Revised*** infobase. These features are described in further detail on the following pages. Before you can use these personalization features, however, you must first create a "Folio shadow file."

A shadow file is a unique Folio Views feature that allows you to store and retain the personal changes that you make to an infobase. Much like an *overlay* or *transparency* allows you to mark up or annotate information without changing an original printed document, a shadow file allows you to change information in a *personal view* of an infobase without affecting the master infobase. When you create a shadow file, you create an *overlay* for an infobase. When you add notes, highlighters, or bookmarks to the shadow file, they do not appear in the original infobase (the master). Any change that you make to the shadow file appears only in the shadow file.

### Creating a Shadow File

To create a new shadow file:

Step 1 Open the ***Robert's Rules of Order Newly Revised*** infobase.

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

Step 3 Select **Folio Shadow File** from the **File type** list.

Step 4 Click in the **File name** field and enter a name for the shadow file.

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

Step 5 Choose **OK**.

### Opening a Shadow File

To open an existing shadow file:

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

Step 2 Locate the shadow file you wish to open.

- Shadow files have a .SDW extension.

Step 3 Double-click on the file to open it.

## Highlighters

Highlighters are used in an infobase in a similar way that highlighter pens are used on paper-based books and articles. However, unlike highlighted text that must be searched by turning pages, the highlighters you create in Folio Views can be searched separately from the rest of the infobase. You can search for words contained in a particular highlighter or you can search for all the places where a particular highlighter was applied. In addition, you can customize highlighters by adding colors and changing character attributes, such as font and bold. (Before using highlighters, you must create a shadow file, as described above.)

### Creating and Applying Highlighters

Step 1 Select a block of text.

Step 2 Select the small **Highlighter** button on the right end of the toolbar, or press **CTRL + H**. (This is different from the larger *Highlighters* tool. For more information on using the *Highlighters* tool, see the *Help Infobase*.)

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

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

- You can create unique attributes for your highlighter. For example, you can change the font, the point size, the foreground color, or the background color. Choose **OK** to close the *Highlighter Format* dialog and apply the formatting attributes to the highlighter.

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

## Notes

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

### Creating and Accessing Notes

Step 1 Move the cursor to the record where you want to attach the note. Each paragraph or table cell can contain one note.

Step 2 Select the **Note** button on the toolbar (or press **CTRL + N**).

Step 3 Type the text you wish to include in the note. Size the note window to your desired size.

Step 4 When you are finished, close the note by clicking the X or pressing **ESC**.

Step 5 Choose **Yes** to save the note or **No** not to save it.

Step 6 When you want to view or edit the note again, click on the note icon (or place the insertion point in the record containing the note and press **CTRL + N**) to open the note.

---

*The notes you create can be printed as end notes when you use the printing feature. Choose **Options** from the **Tools** menu, select the **Print** tab, and click on the **Notes** checkbox to turn this feature on or off.*

---

### Deleting Notes

To remove a note:

Step 1 Place the insertion point in the paragraph or table cell containing the note.

- Select multiple paragraphs if you wish to remove several notes at once.

Step 2 Choose **Remove Note** from the **Tools** menu (or press **CTRL + SHIFT + N**).

## Bookmarks

Bookmarks in Folio Views serve the same function as regular bookmarks: you use them to mark your place. When you no longer need the bookmark, you may remove it. You can have an unlimited number of bookmarks in each infobase. (Before creating bookmarks, you must create a shadow file, as described above.)

### Creating and Accessing Bookmarks

Step 1 Move the cursor to a location in the infobase you wish to mark.

Step 2 Select the **Bookmark** button on the toolbar (or press **CTRL + M**).

Step 3 Give the bookmark a meaningful name and choose **Set**.

Step 4 When you need to access the location, click the **Bookmark** tool and double-click the name of the bookmark you wish to use.

Step 5 To delete a bookmark, select the **Bookmark** button, choose the name of the bookmark you wish to remove, and select **Delete**.

## Customizing the Toolbars

Folio Views allows users to customize the toolbars to suit their needs. Under **View**, choose **Toolbars**. Users will see the standard toolbars listed: Search, Personalize, Navigation, and Standard are the default toolbars and appear checkmarked. Format, Table, and Link appear unchecked. Some features on toolbars will not work unless a user has first created a shadow file, and some features will appear grayed out if you do not have edit privileges for the infobase.

**Format** — Contains often used formatting options, including the style list, font list, character formats, and paragraph justification.

**Link** — Contains all of the link options for creating or removing links.

**Navigation** — Contains common actions to help you move around the infobase, including Go Back, Go Forward, Show History, Go To, and Synchronize Contents.

**Personalize** — Contains classic personalization tools, including highlighters (both creation and application), Bookmark, and Note.

**Search** — Contains the most common search tools, including Advanced Query, Query Selection, Clear Query, Show/Hide Hit Highlighting, Query Tool, Previous Hit, Next Hit, Previous Partition Hit, and Next Partition Hit.

**Standard** — Contains standard file management actions, including New, Open, Save, Explore Infobases, Find Infobases, and Print.

**Table** — Contains table creation and formatting options, such as Insert Table, Table Format, Cell Format, and Merge Cells.

To customize your toolbar buttons, click **Customize** from the right-hand listing. Under the **Toolbars** tab, you will find a listing of the categories and the tool icons associated with each category. To customize an existing toolbar by adding a tool, drag a tool from the dialog and drop it with the mouse pointer to an existing toolbar in the main program window. If you drag the tool off the dialog but do not attach it to an existing toolbar, a new toolbar is created. New toolbars will appear under the **Toolbars** list with the standard toolbars.

- Click on a tool in the dialog for a description of the tool.
- Drag tools off a toolbar in the main program window to remove them from the toolbar.
- Drag tools from one location to another on a toolbar in the main program window to rearrange the tools.

## Recommended Custom Tools

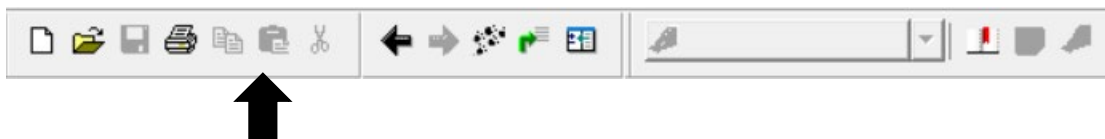
There are several tools that may be most helpful for users to considering adding to a toolbar for quick reference:




Query Template 1 and Query Template 2 icons – found under the Search category, added to the Search toolbar at the bottom of the screen. Query Template 1 is used for the Chapter search, while Query Template 2 is used for the Index search.



### Query Templates

Adding Copy, Paste, and Cut to the standard toolbar at the top of the screen:



-  Copy
-  Paste
-  Cut

In addition, users can remove icons on the toolbar that are not needed when under **Views, Toolbars, Customize**, by dragging unneeded icons off the toolbar. Changes to toolbars that users make do not affect others' use of the software.



To order additional copies of ***Robert's Rules of Order Newly Revised*** on CD-ROM or additional network user licenses, please contact us at 800-445-5588 or at [sales@amlegal.com](mailto:sales@amlegal.com).