THE PATHAGORAS SYSTEM

Document 'Dis'-Assembly:
Creating Building Blocks

Supplemental Manual

Document Dis-assembly

Table of Contents

1   Introduction

> This pamphlet was formerly a major portion of the main Pathagoras Manual. It is now a stand-alone pamphlet.
>
> This Pamphlet is intended for System Managers and more advanced user of Pathagoras. However, most of the steps outlined can readily be followed by the novice user.

Document 'dis-assembly is the process by which an existing document is deconstructed into its component parts. The individual pieces are saved as separate clauses ('building blocks') in a designated folder or glossary. These pieces can then be reassembled to create a wide, practically unlimited, variety of new documents.

With apologies to Elizabeth Barrett Browning:

How do I disassemble thee? Let me count the ways."

There are perhaps a dozen ways that you can disassemble documents with Pathagoras. All are quite easy, but it is essential that you understand that all methods are based on a single, simple, unvarying principle:

> Regardless of the technique used, when you add a document to a folder (*any folder*), that document is instantly a part of the Pathagoras 'system.' Stated even more simply, put any document into any folder and that new document is instantly available to Pathagoras.

You probably already have many documents that are ideal for dis-assembly. The ones found in your 'office forms' folder certainly qualify. So do the ones that are ideal form material but which are currently laden with personal information (names, addresses, etc.) So are the ones found in practice systems manuals to which you subscribe and documents that you received at Continuing Professional Education courses. Even documents you may find over the Internet are good candidates for document disassembly.

Pathagoras provides you three primary document dis-assembly methods. (Within each major method, there are minor variations in the 'marking' process.) We have called them:

1. "Highlight & Add",

2. "Bulk-Add" and

3. "Instant Book".

After a brief discussion of elements and issues common to each, the techniques are discussed and fully illustrated in the following sections of this Manual.

There is a fourth method that we are going to discuss first. This method is not one that Pathagoras 'provides' because it is readily available to every user. When you get to the heart of the pamphlet, we discuss it first. We call it "Just save it." That means, just manually save any text into the folder represented by a 'book.' It is important that you understand that all of Pathagoras tools are based in this 'manual' method. Pathagoras only makes it faster.

> ### Caution:
> One of the most common 'mistakes' made by the newcomer when implementing the dis-assembly tools in the pamphlet is to try to make every paragraph of a document a building block. Pathagoras actually makes it easy to make that mistake. So we offer this word of caution at the outset:
>
> Don't be over-zealous in your document dis-assembly efforts.
>
> Be mindful of what really should be a separate clause and what should not. If sections of a document naturally belong together, keep them together.

2   Building Blocks defined

Pathagoras uses Word documents as the 'building blocks' for document assembly. Therefore,

'building block' = 'Word document.'

Since a building block is a (any) Word document, it logically flows that if you save a useful Word document into a designated folder, that document automatically becomes part your document assembly system. That is the logic upon which the remainder of this pamphlet is based.

Stated a bit differently:

Any document stored in any Word/Windows folder that you have previously designated (or intend to designate) as a book or a DropDown List is part of the Pathagoras document assembly system with nothing more required on your part.

Here are the 4 techniques that Pathagoras uses to create/manage those building blocks.

1. **It's already there.** Of course, this is not a technique, but it is reassuring to know that any document that currently resides in a folder to which you have pointed a book is automatically part of the book.

2. **You copy it there.** Copy a document from one folder and paste it into the folder you designated as the book. The mere act of saving a document into a folder you have designated (or intend to designate) as a book makes that document part of the book.

3. **'Save' or "SaveAs' an on-screen document.** If you simply save previously unsaved text into a folder you have designated (or intend to designate) as a book, the document becomes part of the book.

4. **Create a new document.** Type (or paste) text onto your editing screen. Press Save and save the text as a document into the folder you have designated (or intend to designate) as a book. The mere act of saving a new document into the 'book's' folder makes the document part of the book

As hopefully you can tell, there really is nothing special about a building block in Pathagoras. *A building block is simply any document in any folder.* This is so foreign to the way other programs operate (that building blocks are stored 'elsewhere' in places that are difficult to access and difficult to edit) that it actually is confusing to the new user. But this abject simplicity is the heart of the Pathagoras system.

So, you might ask "How can I confirm that the documents I saved in my folder are also part of my book? Simple. After you save your text, click File Open (a plain Word command) and navigate to that folder to confirm the document is really there. (That step is optional, but we just want you to see the document in 'native Word'.) Then return to a regular screen.

Now click Pathagoras' document assembly button. Then click the radio button next to the book name that points to the folder and click 'Next'. All documents (including the new ones) are in the listing at the left. No magic. Pathagoras is simply reporting what is present in the folder at the time it reads the folder.

3 'Manual' Document 'Dis'-assembly

3.1 Assumptions and Setups

For the following examples, we are going to use this "Last Will and Testament" as the document which we will disassemble.

LAST WILL and TESTAMENT

of

JOHN PAUL DOE

I, JOHN PAUL DOE, SSN: 456-78-9012, being of sound and disposing memory, do hereby declare this writing to be my last will and testament, revoking any previous Will which may have been made by me.

A. I am married and have two children. My wife's name is RoseMary Doe, and my children's names are Robert Doe, Alan Doe and JoAnne Doe.

B. I direct my hereinafter named Personal Representative to pay all of my just debts and final expenses.

For the initial examples, we are going to break out the second substantive paragraph of above Last Will and Testament (starting with "A. I am married . . .").

The first thing we may wish to do is to Pathagorize the text so that it reads:

> A. I am married and have {!ch!one child/OR[Number of Children] children}. My [spouse:husband/wife]'s name is [Name of Spouse], and my {!ch!child's name is/ORchildren's names are} [Name(s) of children].

You can copy and paste the above text into a document and test the text as we proceed. (Note that several different 'Pathagorizing' techniques are in use. They are explained in the text box at the foot of this page.)

We will call this clause 'Family Structure'.

We are going to be using the same folder that we have always been using to store Will clauses, which we are, for this example, going to call C:\Office Forms\Estate Planning\Will Clauses. (Some like to create a brand new folder to segregate 'Pathagorized' clauses from the older versions of the text. This is perfectly okay, but just know that it is not required.)

Let's further assume that the above path has previously been associated with a book in the Document Assembly system called "Will Clauses". Let's further assume that a DropDown List has been created and

it contains the names of all the clauses in the same folder.

A.   I am married and have {!ch!one child/OR[Number of Children] children}. My [!spouse!husband/wife]'s name is [Name of Spouse], and my {!ch!child's name is/ ORchildren's names are} [Name(s) of children].

Several Pathagorizing techniques are in play in this snippet. The first one "{!ch!one child/OR[Number of Children] children}" uses simple Options text (surrounded by curly braces. Note the /OR separates the options. The !ch! group name ties this section to the options block further down in the document. The selection of one automatically results in the selection of the other based on the 'position' of the selection. Observe the nesting of the simple variable [Number of Children] within the options block.

The variable [!spouse!husband/wife] likewise is a multiple choice *variable* also with with a group name.

3.2   Just Save It

"The simple act of saving a document to the folder to which a book points
makes the document a part of the book."

While this is not the most 'glamorous' way to disassemble a document, understanding that it works this way may be the most important concept in this entire pamphlet. It is vitally important to fully understand that all that the tools discussed and illustrated elsewhere are nothing more than fancy versions of Word's native 'Save' function.

1. Highlight the text you want to save. (So highlight the paragraph starting with "A. I am married . . .)
2. Copy the highlighted text to the clipboard using regular Windows 'copy' techniques with which you are already familiar. (Either "Right-click | Copy" *OR* "Ctrl-C").
3. Open a blank document.
4. Paste the clipboard contents to the blank document (Either "Right-click | Paste" *OR* Ctrl-V).
5. Click Word's Save icon (or click File|Save) and save the document into the folder C:\Office Forms \Estate Planning\Will Clauses. Use the name "Family Structure".

This simple act of saving the text as a regular document into the standard 'Will Clauses' folder (and nothing else) has made the document "Family Structure.doc" a part of the book called Will Clauses. (Of course, it is also a simple document in the folder called Will Clauses.) The next time you display the Will Clauses book, 'Family Structure' will be there.

As mentioned in the introduction, all of the document disassembly methods provided by Pathagoras are merely a variation on the simple, intuitive, manual method described above.

3.3   Save It Via the Book

"Once you have associated a folder to a book, Pathagoras handles all future navigation for you.
Just highlight your text, click on the book and Pathagoras can take you there instantly."

This is a 'cool tool'. It really does the exact same thing as happened in the previous page, but it is more automatic and a lot faster.

1. Highlight the text you want to save.

2. Copy the highlighted text to the clipboard.

3. Click the Document Assembly icon and select the Library and book into which you wish to save the clause.

4. From the expanded screen, click the 'Save text to selected book' (second entry from the bottom).

5. Click Next. Name the document "Family Structure" and you are done.

The simple act of saving the text in this way has made "Family Structure" a document in the Wills folder and a part of the book called Will Clauses. The next time you display the Will Clauses book, 'Family Structure' will be there.

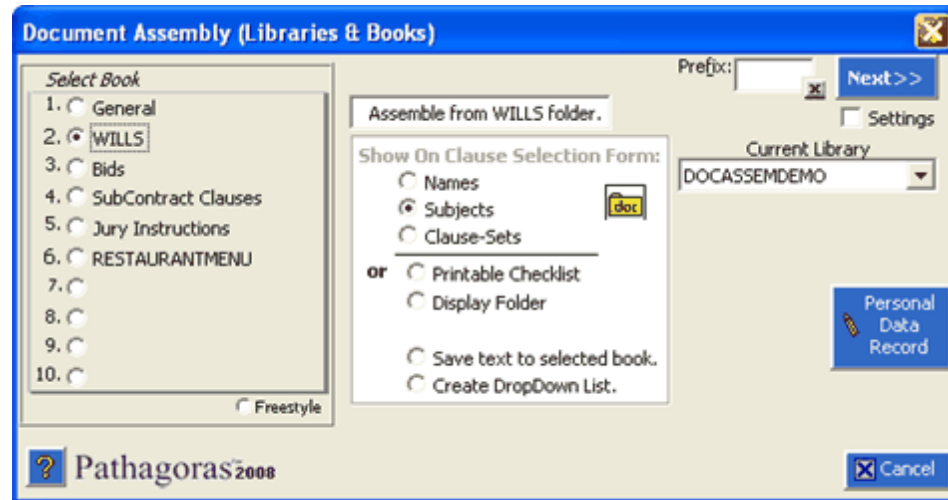## 3.4   Save It Via the Drop Down List

"Once you have associated a folder to a DropDown List, Pathagoras handles all future navigation for you.
Just highlight the text, click on the DropDown List and Pathagoras can take you there instantly."

This tool is also really 'cool'. It really does the exact same thing as happened in the previous pages, but it is more automatic. Unlike the others, it assumes that the folder into which you wish to save the new clause is a Pathagoras DropDown List now showing in the menu area of your screen.

1. Highlight the text you want to save.

2. Click down the appropriate DropDown List.

3. From the expanded screen, click the 'Save Doc to Folder' element.
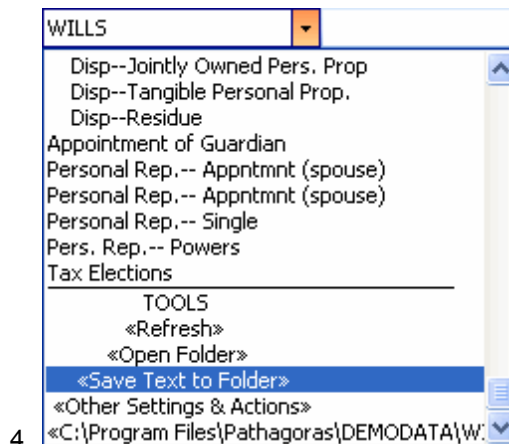
4.

5. Provide the name "Family Structure" when requested.

Pathagoras quickly saves the text to the folder represented by the book. This simple act has (1) added the text to a document called "Family Structure.doc" to the folder to which the Drop Down Lists points, has added it to the DropDown List itself, and if you have a book called Will Clauses that points to the same folder, made it a part of that book. The next time you display the Will Clauses book, 'Family Structure' will be there.

3.5   Highlight & Add (Alt-G)

"TermWorks is quite possibly the easiest document disassembly tool out there. It is simply "Highlight & Add."

(Actually, the techniques discussed in the previous sections are also pretty easy, but once you have tried TermWorks, you will see why we are so proud of it.)

1. Highlight the text you want to save.

2. Press the keyboard combination <Alt-G>. The TermWorks screen appears*.
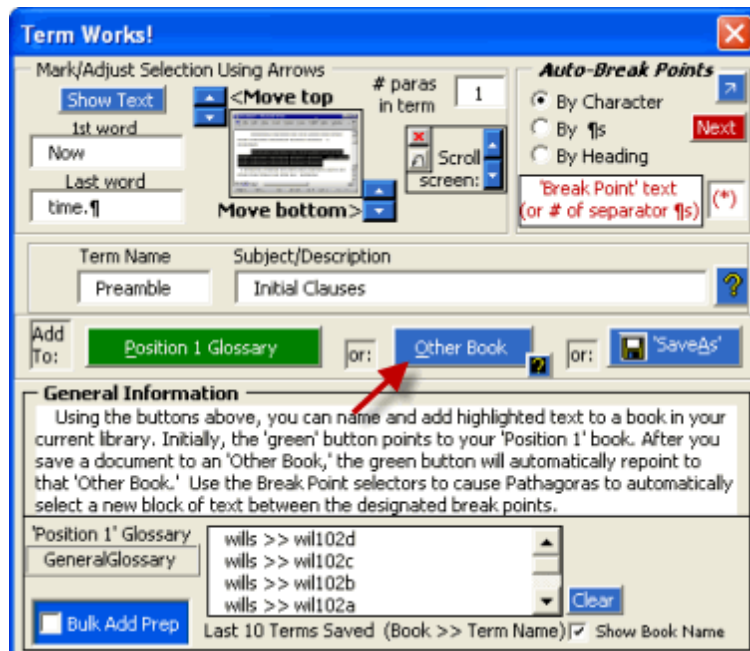
3. Provide a name and subject (optional) in the boxes provided.

4. Select the target book (folder) for the clause. The TermWorks screen presents 3 choices.
   - The 'Position 1 book' ;
   - 'Select Book' (which, when clicked, will display all 10 books in the current library); and
   - SaveAs (which allows you to navigate 'free style' to any folder available to your system).

5. Select 'Other Book' and the select the Wills book from the expanded screen.
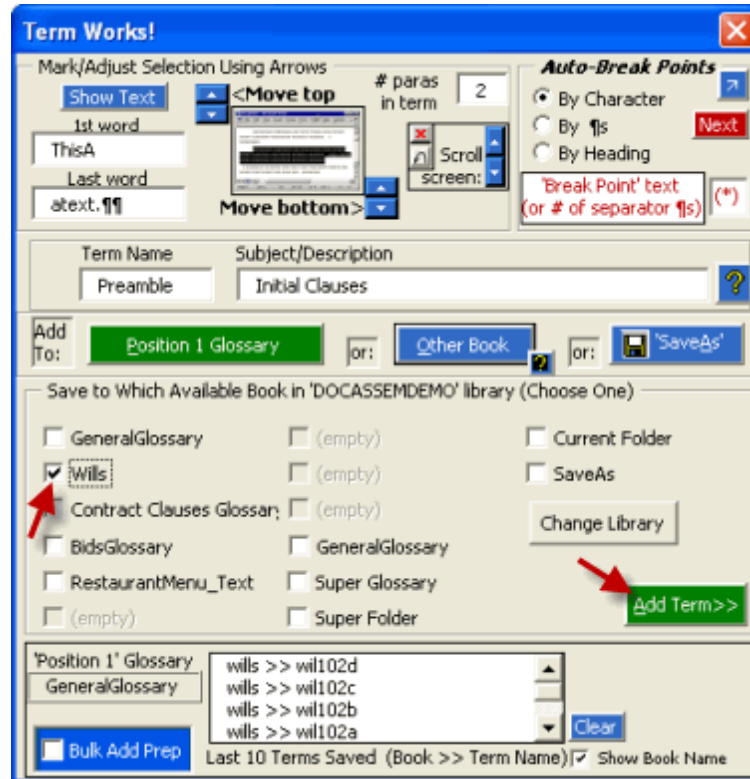
6.

7. Click Add Term. Done! In the blink of an eye, Pathagoras has copied the highlighted text, opened a new document, pasted the text into that document, saved the new document to the proper folder, closed the document and returned you to your original document. (These are the same steps more or less manually taken by you in the previous sections of this Pamphlet.)

The next time you display the Will Clauses book, 'Family Structure' will be there.

🏛 Highlight & Add was designed for situations where you want to add just a few clauses into a book. When the number of potential building blocks approaches 10 or more, consider the Automated Document Disassembly techniques discussed below. There, we describe how to pre-mark an entire document to show the appropriate break point, to pre-name the clauses, to provide appropriate 'subjects' to the clauses and, when you are satisfied with the pre-markings, to deconstruct the marked document *en masse*.

————————————

*You may have observed that when you press Alt-G against unhighlighted text you didn't get the TermWorks screen. That is because Alt-G operates contextually. Pressed to the left of unhighlighted text, Alt-G 'g'ets (recalls) the text to its left. If press against highlighted text, it calls up TermWorks screen.

4   Automated Document Disassembly

4.1   Instant Book

Summary: Pathagoras' *Instant Book* routine allows you to take a complete document, mark it up using an easy to follow process and disassemble the entire marked-up document into its component clauses in a single action.

   The first part of the process requires to identify the begin and end points for each specific clause. Then you provide an appropriate name and subject for each clause. The marking up is all done using 'plain text, regular keyboard' characters.
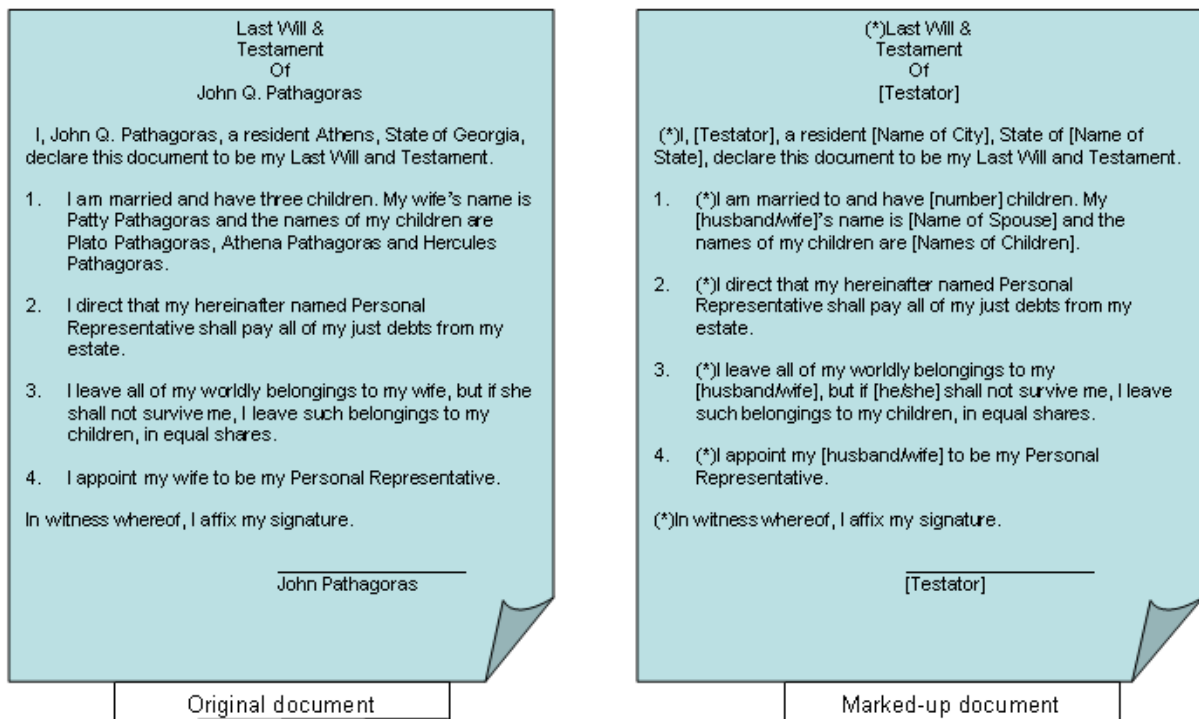
   After the mark-up is complete, you can then direct Pathagoras to break up the document into the designated clauses. The result is a fully functional document assembly system that can be used 'as is' or further modified to suit your needs.

   The prefix/suffix naming style is assumed when you are using this technique.

4.1.1   Instant Book Markup

Last Will &
Testament
Of
John Q. Pathagoras

   I, John Q. Pathagoras, a resident Athens, State of Georgia, declare this document to be my Last Will and Testament.

1.   I am married and have three children. My wife's name is Patty Pathagoras and the names of my children are Plato Pathagoras, Athena Pathagoras and Hercules Pathagoras.

2.   I direct that my hereinafter named Personal Representative shall pay all of my just debts from my estate.

3.   I leave all of my worldly belongings to my wife, but if she shall not survive me, I leave such belongings to my children, in equal shares.

4.   I appoint my wife to be my Personal Representative.

In witness whereof, I affix my signature.

John Pathagoras

Original document

(*)Last Will &
Testament
Of
[Testator]

 (*)I, [Testator], a resident [Name of City], State of [Name of State], declare this document to be my Last Will and Testament.

1.   (*)I am married to and have [number] children. My [husband/wife]'s name is [Name of Spouse] and the names of my children are [Names of Children].

2.   (*)I direct that my hereinafter named Personal Representative shall pay all of my just debts from my estate.

3.   (*)I leave all of my worldly belongings to my [husband/wife], but if [he/she] shall not survive me, I leave such belongings to my children, in equal shares.

4.   (*)I appoint my [husband/wife] to be my Personal Representative.

(*)In witness whereof, I affix my signature.

[Testator]

Marked-up document

Marking up a document for Instant Book

Markup, #1: Convert 'real' names, addresses, quantities, or other personal information into plain text variables. ('Pathagorizing' your document is discussed in the main Pathagoras Manual and will not be

repeated here. We assume that you know those basic processes.)

Markup, #2: Mark where each new clause is to begin. Any marker will do. We have used "(*)" in the example shown above.

Hint: Once you have decided on the special marker, just type it once. Then, highlight and 'copy' it into your clipboard. Then you can easily paste it at each location you want a new clause to start. That will save time and avoid typos.

If a paragraph contains auto-numbering fields such that you cannot move the cursor in 'front' of the number, the marker should be placed adjacent to the first character to the RIGHT of that number. This is illustrated in the example.

4.1.2 Disassembly

The Final Step--Disassembly

After you have a marked-up document with which you are happy, you are now ready to disassemble it. The Document Disassembly Menu is found under Authoring/Editing Tools | Clause Creation Tools
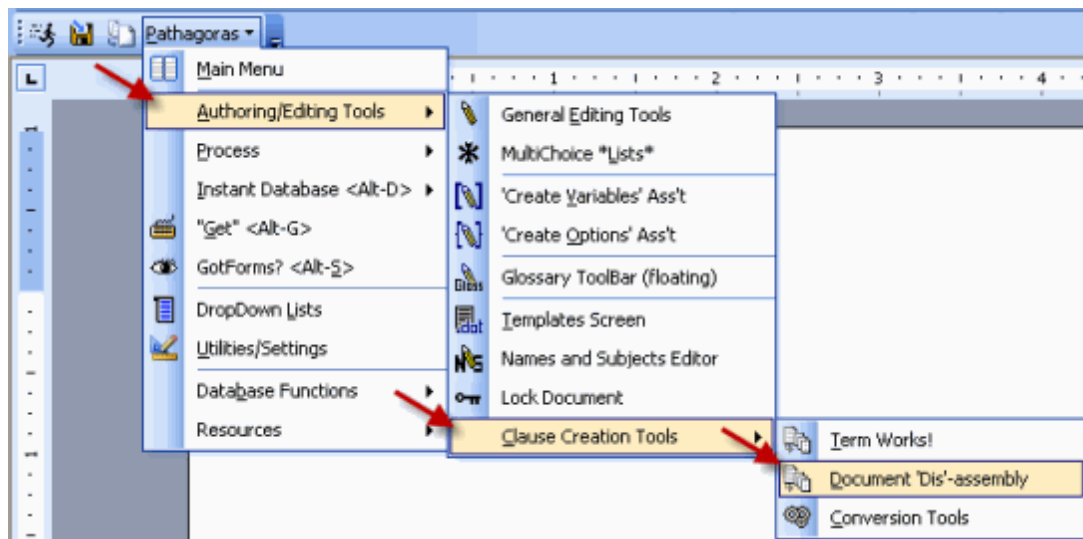
Clicking the Document 'Dis'-assembly button presents this menu:

The Introduction/Instructions available in the first two menu items provide helpful additional guidance on the process of deconstructing your source documents into building blocks of text. They essentially repeat what you have read in this Manual.
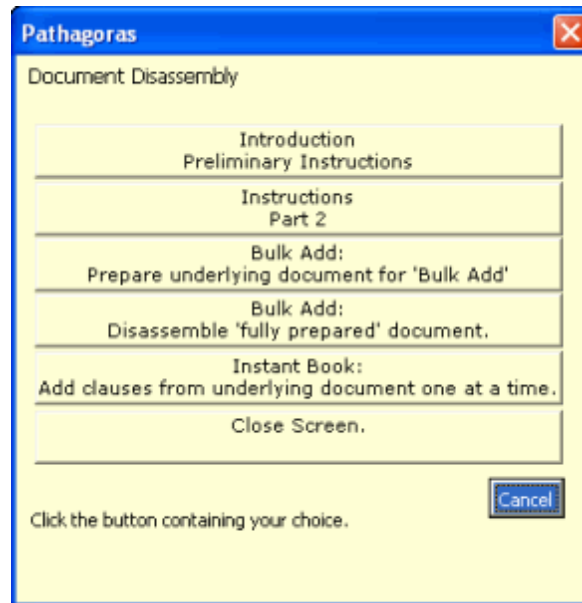
Click the "Instant Book" selection.

On the resulting screen, you will be able to select whether you want the new book to be a 'folder' or a 'glossary'.

Pathagoras will then ask a series of questions for you to answer:

- "What name do you want to give to your book?" Any name will do, but it should be meaningful to you. If you are creating a glossary (a special kind of 'book'), the name for that book must end with the word "glossary" (not case sensitive; spaces in the name are fine).

- "Where do you want the new book to be saved?" (The default is the directory from which the original document came. Or you can navigate to a new folder.)

- "What prefix do you want to use?" (Pathagoras will use its standard prefix/suffix naming style when it names the various clauses for you. Provide a *two* to *four* character prefix. We suggest a prefix that is meaningful and which will help you and others to remember the types of clauses saved in the book. For example, a book of Will clauses might start with the prefix 'will'.)

  In creating your clauses, Pathagoras will initially assign names using the prefix/suffix style of naming. This has distinct advantages, especially if you wish to recall of term from the editing screen. See Prefix/Suffix Naming Style in the main Manual. Don't worry that the prefix/suffix name may initially be meaningless to you. You will be adding a 'Subject' to each clause so that you can readily tell the import of the term. This way, you have the best of both worlds.

- "What is the number for the first clause?" The default is '100.' (Continuing with the above example, the first clause will be named 'will100'.)

- "What numerical increment between clause numbers do you want to use?" (Default is 10. This allows Pathagoras to automatically number the clauses for you, yet leaves room for you to add your own clauses. Continuing with the above example, the second clause will be named 'will110'.)

Once all the questions are answered and you direct the program to proceed, Pathagoras will quickly search out the designated special marker. Following the rules you provided, Pathagoras assigns the

appropriate names to each new document or glossary term.

When Instant Book finishes disassembling your document, Pathagoras will ask you if you want it to automatically shelve the newly created book in the first available slot in the active Document Assembly library. You should typically say 'Yes,' but can defer this step. If you want to attach the book to another library, you will be given that option as well.

 After the book is created, Pathagoras will then

(1) offer to generate a helpful instruction guide on how to 'perfect' the book for most efficient use in your office. If this is your first time, do print and read the instructions. They will not be repeated here.

(2) offer to help you to complete the assignment of 'Subjects' for each term. For the latter, Pathagoras will scan the first line of each term. If the first line (or first words of the line) are in bold, italics, underlined or all 'caps,' Pathagoras will propose those words as the term's subject. (The 'subject' is what appears next to the term's name in the document assembly screen, in dropdown lists, in the various printouts that you can generate, and other places where you need a full description, not the prefix/suffix 'formal' name.

Now Test

If you took advantage of the 'automatic shelving' offer described immediately above, you can test your new book by pressing the Document Assembly button. You will see your new book in the library. Double click on the option circle to display your new clauses onto the Clause Selection Screen. Select the clauses you want to assemble and press Next>>.

With the above steps completed, you now have a fully functional 'book.' You can easily add more terms to the book using Pathagoras 'highlight & add' routine: Highlight the text you want to add and press <Alt-G>. The Term Works! screen will appear. Give the new term a name and a subject and then click the Add Term button. Select the book into which you want the term saved, and it is quickly done for you. Using other tools (including ordinary Word 'copy and paste' tools, you can further augment and refine the book to create a powerful, yet easy to modify and easy to understand document assembly system.

4.2   Bulk Add

Summary: Pathagoras' *Bulk Add* routine allows you to take a complete document, mark it up using an easy to follow process and disassemble the entire marked-up document into its component clauses in a single action.

The first part of the process requires to identify the begin and end points for each specific clause. Then you provide an appropriate name and subject for each clause. The marking up is all done using 'plain text, regular keyboard' characters.

After the mark-up is complete, you can then direct Pathagoras to break up the document into the designated clauses. The result is a fully functional document assembly system that can be used 'as is' or further modified to suit your needs.

4.2.1   The 'Master' Document

(c:\disassemblytext.doc)

We are actually going to start at the end and show you the 'end game' first. This should make the intermediate steps regarding the preparation of a document for document dis-assembly more understandable.

The goal of document preparation is the creation of what we have dubbed a "Master Document." It contains all of the markings necessary for Pathagoras to perform a quick and accurate disassembly of the Master into its marked components.

Figure 1 below is a sample 'source document'. It represents any document that you can select for disassembly. Figure 2 represents a fully marked Master Document. To get from the first to the second, we Pathagorized the original (adding variables in place of real names and numbers) and we then added the additional markup characters to denote the begin and end points of each clause, as well as the name and subject that we want to assign to each disassembled clause. (Just to head this question off at the pass, the coloring you will see in Figure 2 is for illustration purposes. It is in no way a requirement of a Master Document.)

LAST WILL and TESTAMENT

of

JOHN PAUL DOE

I, JOHN PAUL DOE, SSN: 456-78-9012, being of sound and disposing memory, do hereby declare this writing to be my last will and testament, revoking any previous Will which may have been made by me.

A. I am married and have two children. My wife's name is RoseMary Doe, and my children's names are Robert Doe, Alan Doe and JoAnne Doe.

B. I direct my hereinafter named Personal Representative to pay all of my just debts and final expenses.
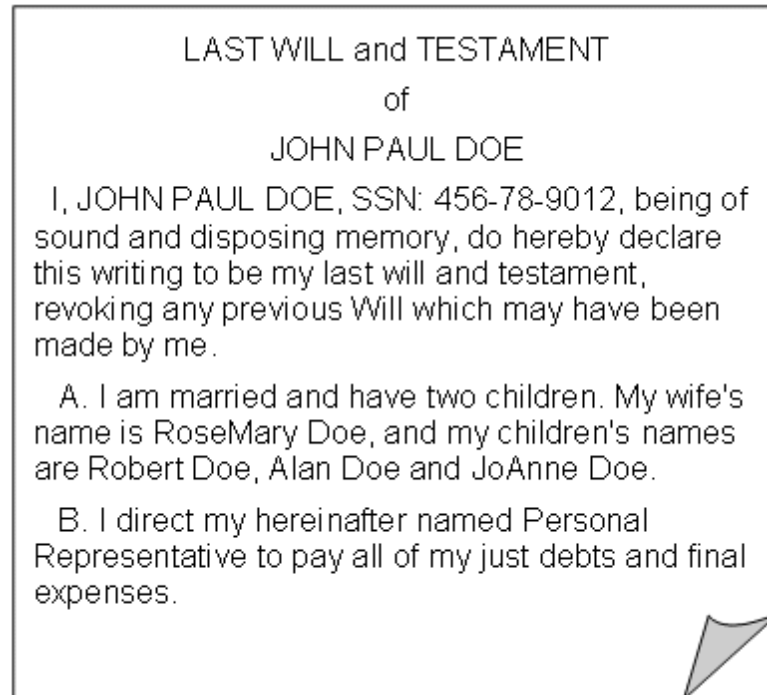
Figure 1. A base form. This can be any document that currently resides in your computer. We selected a Last Will and Testament as the sample document.

<&will100/Preamble to Will/LAST WILL and TESTAMENT

of

[CLINAME]

I, [CliName], SSN: [SocSecNo], being of sound and disposing memory, do hereby declare this writing to be my last will and testament, revoking any previous Will which may have been made by me.&>

<&wil110/Family:Married 2+ children/A. I am married and have [NUM_CHDN] children. My spouse_type's name is [SPOUSE_NAME], and my children's names are [CHDN_NAMES].&>

<&wil120/Payment of Debts/B.I direct my hereinafter named Personal Representative to pay all of my just debts and final expenses.&>
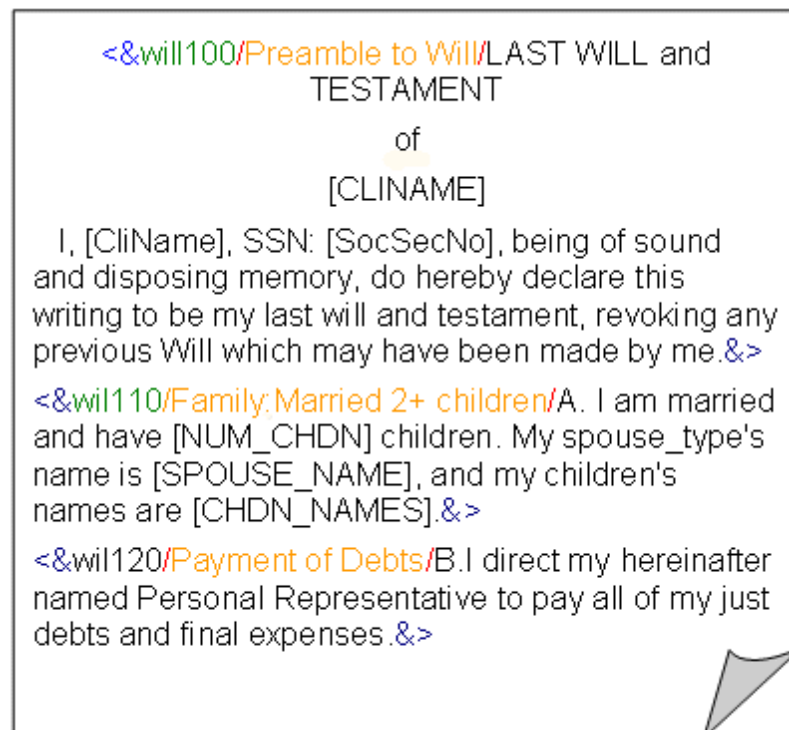
**Figure 2. A 'Master Document', properly Pathagorized ('neutered')
and marked up for dis-assembly.
To make it easier for you to see the essential parts,
we have painted the boundary markers in blue, the clause names in green,
the subjects in orange and the slashes in red.**

The essential parts of a Master Document are:

- A marker ('<&') that denotes the beginning of each clause you wish to covert to a building block;

- A name that you want to assign to the clause when it is disassembled, concluded by a slash ('/');

- A subject (optional if your disassembly target is not a glossary) that you want to assign to the clause when it is disassembled, concluded by a slash; and

- A marker ('&>') that denotes the end of the text block to be disassembled.

NOTES: The colors in the above example are for emphasis only. Colors are in no manner required for preparation of the Master Document. All essential parts are in plain text. This plain text approach makes it easier for you copy, move, delete, add to, duplicate and otherwise edit the document until it reflects what you wish.

4.2.2   Manual Markup

To perform document disassembly, Bulk Add requires only (1) the presence of unique markers at the beginning and the end of each clause, and (2) a name for each clause.

Being composed all in 'plain text', the markers can be inserted quite easily manually. Indeed, many users prefer to forego the automatic and semi-automatic tools that Pathagoras provides and hand-mark each clause.

See the 🛉 inset below for clause naming rules that must be followed.

Structure:

The structure of a properly marked clause is:

<&(*Name of clause*)/(*Subject of clause*)/(*Body Text of clause*)&>

The red text shows the begin and end markers and the slashes between the
name, subject and body of the clause.

The blue text shows the clauses name and its (optional) subject.
If the subject is not provided, the second slashes will be immediately adjacent to the first.

Note: colors are for emphasis and illustration purposes only. They are absolutely <u>not</u> required.

For a document to be 'properly marked,' the name of the clause must begin immediately after the 'begin' mark and must end with a forward slash ('/'). The optional subject of the clause must begin immediately after the slash following the name. A closing forward slash ('/') completes the name and subject section. (**Note:** While a subject is optional, the slash is not. If a subject is not used, the name will be followed by two slashes. See second example below.) An 'end mark' must be placed at the end of the desired clause.

Example:

<&Preamble/Opening Paragraph/This Contract dated [Date of Contract] is made between [Buyer Name] and [Seller Name].&>

<&Fixed Price//This is a fixed price contract, not subject to market or other considerations.&>

> 🛉 NAMING RULES:
>
> If you are breaking up this master document up into separate *documents,* keep in mind that normal document naming rules apply.
>
> If you intend to disassemble the document into a glossary (as opposed to a folder of clauses), bookmark naming rules will apply. (This merely means that the glossary term name must begin with a letter, and contain only letters and numbers (and no spaces). The name may contain an underline ('_') character.)

A 'Subject' for each clause is optional, but strongly recommended. It can be anything (to 'make up for', as it were, the 'naming' rules which are limiting). The 'subject' should be relatively short (no more than 45 characters), but can, in fact, be of any length. As with all aspects of Pathagoras, don't spend too much time worrying about the subject. Changing it, if you find the need, is a very simple process.)

Hint: Once you have decided on the opening and closing markers, and typed it once, you should copy it into your clipboard. Then you can easily paste it at each new location. That will save time and avoid typos.

If a paragraph contains auto-numbering fields such that you cannot move the cursor in 'front' of the number, the marker should be placed adjacent to the first character to the RIGHT of that number.

4.2.3   Semi-Manual Markup

Manual markup (discussed above) requires you to hand-type '<&' and '&>' at the begin and end points of each clause. Semi-manual markup performs this for you after just a minimum of setup effort.

Semi-manual markup presumes that if you mark just the beginning of a particular clause, that will of necessity indicate the end of the previous one. Therefore, only one marker is needed. (Of course, this is not always the case. If the end of '1' does not suggest the beginning of '2', you must use 'Manual Markup'.)

Here are the steps.

1. Place a unique break-point character set at the beginning of each desired clause. We recommend the "(*)" character set, but you can use anything you wish.

2. Immediately after each break-point, type the name that you want to assign to the clause. (See the inset below for clause naming rules that must be followed.)

3. If you intend to adopt the Prefix/Suffix naming convention for naming the clauses in the disassembled document, you need only provide a name (in proper 'prefix/suffix' style). Pathagoras will detect your intentions and will, when you take the next step, name all of your subsequent clauses appropriately.

4. Once you have pre-marked the document in accord with the above, run the 'Semi-Manual' routine from the Document Disassembly menu. Access the menu is via the Pathagoras dropdown features menu:
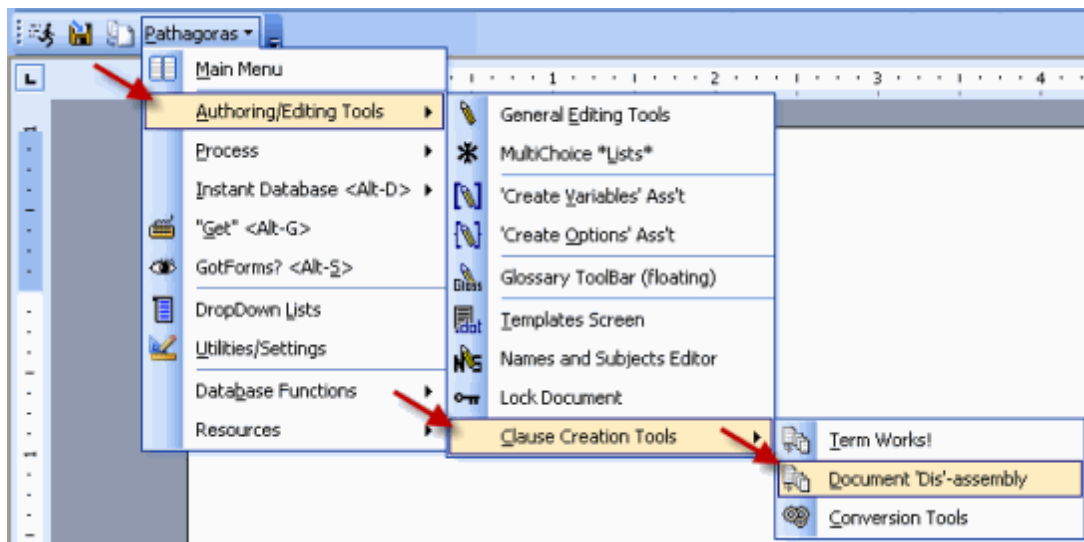
When 'Document 'Dis'-assembly' is clicked the below menu appears:
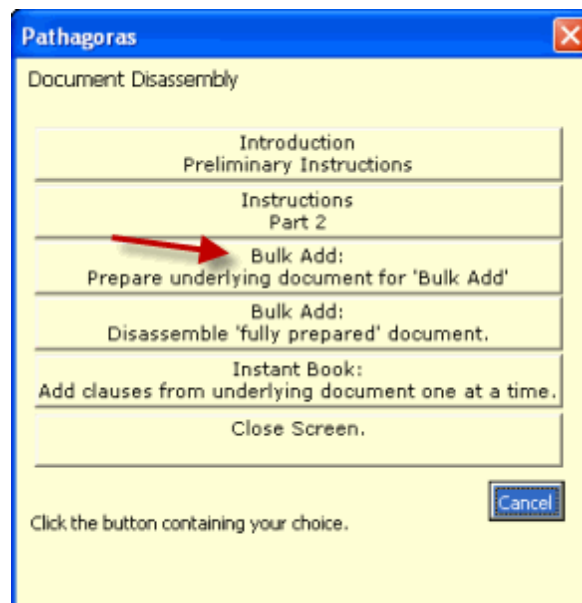
Click the third button to reveal the Bulk Add Preparation options.
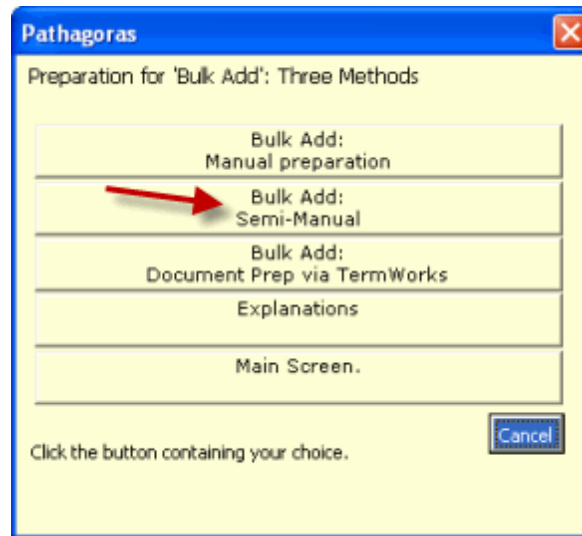
Click the 'Semi-Manual' button

5. Pathagoras will replace the (*) with the appropriate '<&' and '&>' markers at the begin and end of each clause and present a fully completed master document.

    - If prefix/suffix naming has been detected, Pathagoras will appropriately name *and increment* the clauses. You should still add subjects between the "//" that appear right after the name.

    - If no name has been provided, Pathagoras will insert two slashes at the 'head' of each clause. You will need to provide a name (and optional subject).

5. Study the resulting document. If any clause has not been pre-named, you should type the clause's name before moving on. Type the name before the first slash. Type a 'subject' between any double slashes you see.

Structure:

The structure of a properly marked clause is:

<&(*Name of clause*)/(*Subject of clause*)/(*Body Text of clause*)&>

The red text shows the begin and end markers and the slashes between the
name, subject and body of the clause.

The blue text shows the clauses name and its (optional) subject.
If the subject is not provided, the second slash will be immediately adjacent to the
first.

Note: colors are for emphasis and illustration purposes only. They are absolutely <u>not</u> required.

For a document to be 'properly marked,' the name of the clause must begin immediately after the 'begin' mark and must end with a forward slash ('/'). The optional subject of the clause must begin immediately after the slash following the name. A closing forward slash ('/') completes the name and subject section. (**Note:** While a subject is optional, the slash is not. If a subject is not used, the name will be followed by two slashes. See second example below.) An 'end mark' must be placed at the end of the desired clause.

Example:

<&Preamble/Opening Paragraph/This Contract dated [Date of Contract] is made between [Buyer Name] and [Seller Name].&>

<&Fixed Price//This is a fixed price contract, not subject to market or other considerations.&>

🏛 NAMING RULES:

If you are breaking up this master document up into separate *documents,* keep in mind that normal document naming rulesapply.

If you intend to disassemble the document into a glossary (as opposed to a folder of clauses), bookmark naming rules will apply. (This merely means that the glossary term name must begin with a letter, and contain only letters and numbers (and no spaces). The name may contain an underline ('_') character.)

A 'Subject' for each clause is optional, but strongly recommended. It can be anything (to 'make up for', as it were, the 'naming' rules which are limiting). The 'subject' should be relatively short (no more than 45 characters), but can, in fact, be of any length. As with all aspects of Pathagoras, don't spend too much time worrying about the subject. Changing it, if you find the need, is a very simple process.)

💡Hint: Once you have decided on the break-point marker, and have typed it once, you should copy it into your clipboard. Then you can easily paste it at each location you want a new clause to start. That will save time and avoid typos.

➡If a paragraph contains auto-numbering fields such that you cannot move the cursor in 'front' of the number, the marker should be placed adjacent to the first character to the RIGHT of that number.

4.2.4   Last Step Before Disassembly

Before you commit to a disassembly of your marked up master document, study it carefully. You can (and should) edit this document to:

(1) check spelling;

(2) add more variables;

(3) add more options and optional text blocks, if desired; and

(4) add more clauses.

You want to do these things while the document is 'whole.' It is much easier to perform these tasks on a single document that it will be if the document is broken into 50 pieces.

Let's spend a few more moments on the last element (#4) above. Before disassembling what you have right now, you should make 'lots more' alternative clauses. Otherwise, you will have nothing more than the original document broken into its component pieces. When you reassemble it, you will end up with the original document. "What was the point of that?" you could fairly ask.

Your goal is to provide to the end user (including yourself) as many possible clause variations as you can think of so as to maximize the number of document assembly permutations.

Following the same pattern of the now existing mark-ups, duplicate blocks of text. To these new text blocks, make slight variations to reflect different circumstances. Or add entire new text on new, but related, subjects.

If clauses are 'alternative' ones, and you are using the prefix/suffix naming style, consider naming the clauses with an additional suffix which might indicate their alternative natures. For example clauses named 'sub100', 'sub110', 'sub130' might appear to the ordinary user as necessary clauses covering different topics. But clauses named 'sub110a', 'sub110b', 'sub110c' appear more like mutually exclusive

clauses from which the user should select only one.

Despite the above, keep this firmly in mind regarding this Master. (This is true about other elements of Pathagoras as well.) *Don't sweat the small stuff.* If its disassembly does not give you the result you wanted or expected, return to the Master, make appropriate changes or additions and then re-disassemble. It's as simple as that.

Before dis-assembly, the master should be as fully 'Pathagorized' as possible. It should have as many variables as possible in place. Optional and Options text blocks should also be in place in the master. It's not that they cannot be added later, but it is simply much easier to assign variables and options text block in a consistent fashion while working in a single document -- such as the Master -- than in the dozens or perhaps hundreds of documents that will result when the Bulk Add disassembly routine is run.

However, as stated elsewhere, if you find, after disassembly, that you should have done more work to the Master, don't worry about it. Just return to the Master, make changes and re-disassemble.
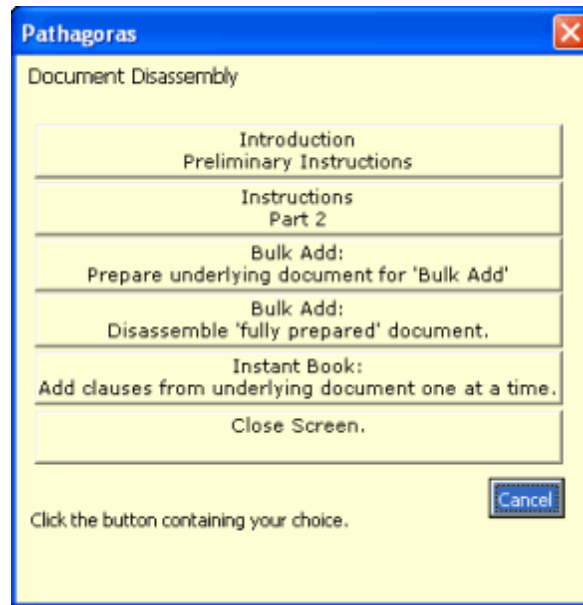
4.2.5   Disassembly

The Final Step--Disassembly

After you have a Master Document with which you are happy, you are now ready to disassemble it. The Document Disassembly Menu is found under Authoring/Editing Tools | Clause Creation Tools
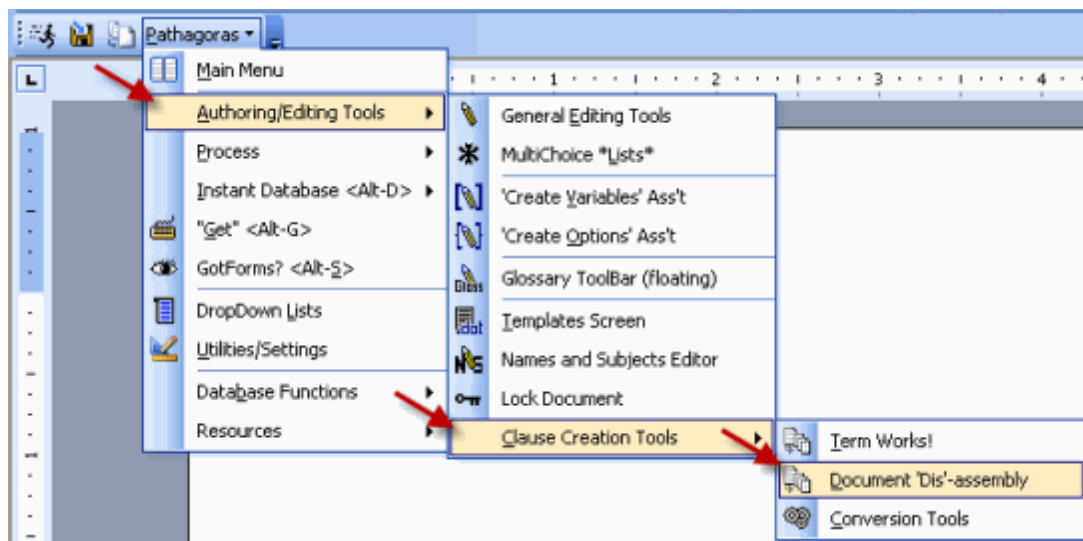
Clicking the Document 'Dis'-assembly button presents this menu:

The Introduction/Instructions available in the first two menu items provide helpful additional guidance on the process of deconstructing your source documents into building blocks of text. They essentially repeat what you have read in this Manual.

Click the "Bulk Add: Disassemble 'fully prepared' document".

On the resulting screen, you will be able to select whether you want the new book to be a 'folder' or a 'glossary'. Choose one and follow the prompts to tell Pathagoras the begin and end markers {'<&' and '&>' are the defaults, which is why we used them in the examples) and other important information. Pathagoras will offer to examine your Master document for construction errors. We urge you to take advantage of that.

When Bulk-Add finishes disassembling your document, Pathagoras will ask you if you want it to automatically shelve the newly created book in the first available slot in the active Document Assembly library. You should typically say 'Yes,' but can defer this step. If you want to attach the book to another library, you will be given that option as well.

If you have adopted the prefix/suffix naming pattern, Pathagoras will also ask if you want to register the prefix.

Done!

Now Test

If you took advantage of the 'automatic shelving' offer described immediately above, you can test your new book by pressing the Document Assembly button. You will see your new book in the library. Double click on the option circle to display your new clauses onto the Clause Selection Screen. Select the clauses you want to assemble and press Next>>.

4.2.6   Reverse 'Bulk Add'

In the previous pages, we discussed the possibility that, when you have major changes to make to your system, you could make them to your 'Master' document and then just recreate the glossary or folder. This works well when the disassembly (and the resulting book) is fresh.

Frequently, especially with mature books, changes were made to the actual glossary or to the individual documents within a folder. In such cases, it simply is not possible to make changes to the Master and recreate the book.

But is IS possible to create a new "Master Document" from the current version of the book. With that Master, you can make whatever universal changes that you wanted and then recreate the glossary or folder from the new (reverse engineered and updated) Master.

To reverse engineer a book into a master:

1. Display the book (at the time of this writing, the reverse bulk add feature can only be applied against a glossary).

2. Click the Pathagoras features list,

3. Select "Authoring/Editing Tools" and then "Clause Creation Tools" selections.

4. Click the "Conversion Tools" entry which will bring up a new screen. The Conversion Tools tab will be selected. Click the "Miscellaneous Tools" sub-tab.

5. Click the entry called "Reverse Bulk Add." A new document containing all of the elements of the source text, but in a more readily editable format, will be created. You will be offered the chance to save it in a new folder and to name anything you wish. (Of course we do recommend that you include the word "Master" to indicate the nature of the document.)

4.2.7 Automatic Markup using Term Works!

NOT RECOMMENDED FOR BEGINNERS. The Manual and Semi-Manual mark-up methods discussed in previous sections is the best way to build your first few Master Documents. Once you understand the 'end game', however, you might wish to consider using Term Works to perform the markups. It provides more automation, and therefore speed, but unless you fully understand what the process behind the process really is (and how simple it all really is) this kind of 'automation' will seem confusing, not helpful.

➢ **Markup using Term Works!**
1. Step one is to pre-mark the clause breaks. Place a unique break-point character set at the beginning of each desired clause. We recommend the "(*)" character set, but you can use anything you wish.
2. Click the Pathagoras dropdown features menu. Click 'Authoring/Editing Tools' and then 'Clause Creation Tools'.
3. Click the *Term Works!*
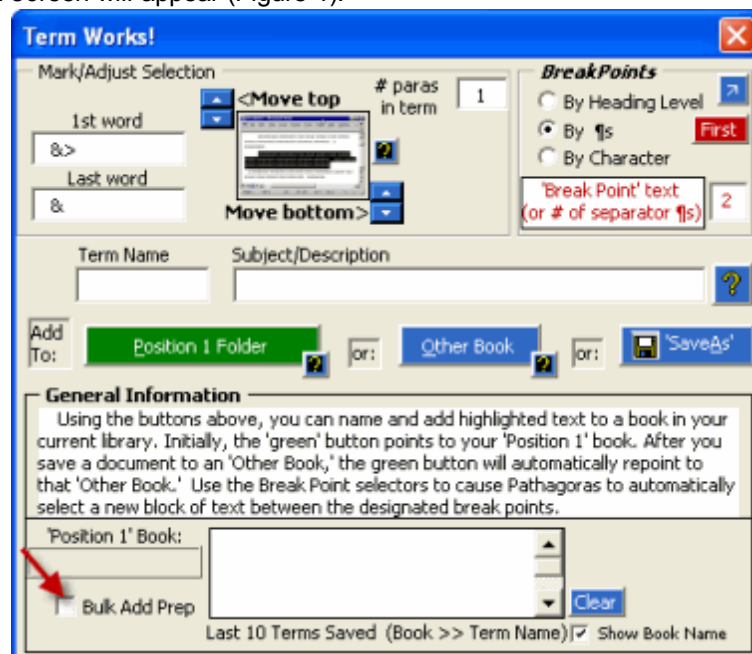4. The Term Works! screen will appear (Figure 1).

Figure 1. The Term Works! Screen.

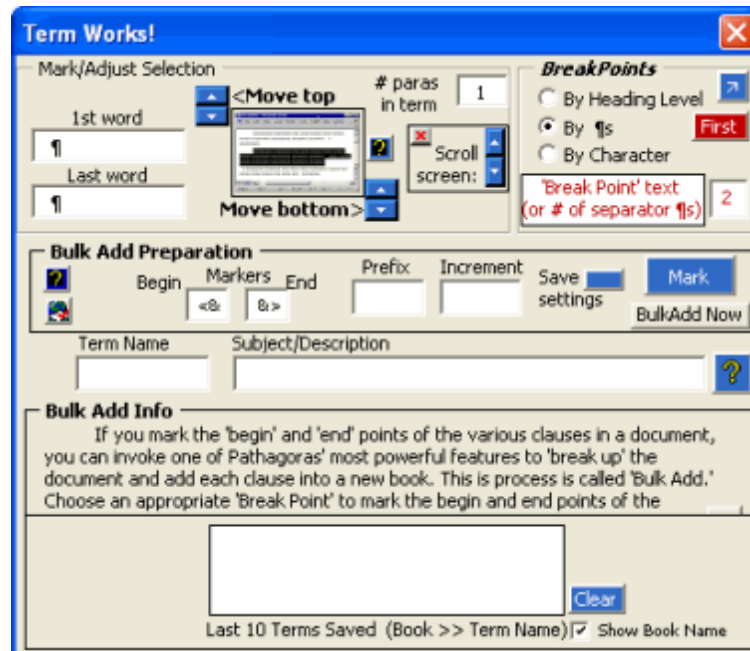5. Click the <Bulk Add Prep> box at the lower left quadrant of the screen.

Figure 2. The Term Works! Screen w/ Bulk Add feature selected.

6. In the upper *right* quadrant of the *Term Works!* screen, click the method by which Pathagoras will determine the first and subsequent portions of the document that you want to mark up. Here we are using the special character "(*)" so click "By Character."

Note the other choices: by 'Heading' and by 'Paragraph(s)'. These are viable options as well, but for this lesson, we are going to stick with special 'Character'.
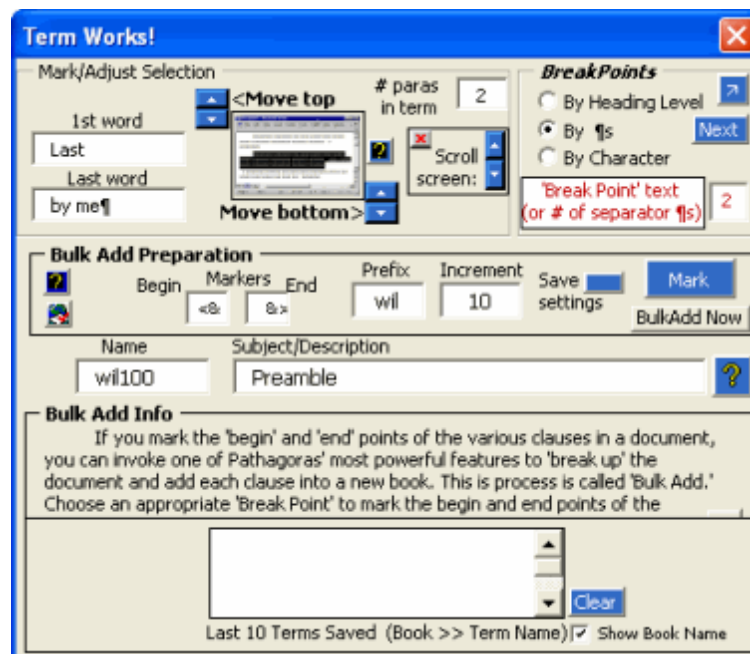

Figure 3. Name and Subject fields completed.

Digression: At this stage in the lesson, we are going to 'insist' that you use Pathagoras'

> Prefix/Suffix Naming Convention to name the clauses you wish to use for document assembly. Even if you don't fully understand it, you will thank us for this push.
>
> Using the prefix/suffix clause naming style will (1) enhance greatly your ability to recall your clauses from their ultimate storage location, (2) will allow you to keep the clauses properly sorted in their order of likely use and (3) will not diminish you ability to attach and display meaningful subjects to your clauses.
>
> (While we are being a bit 'bossy' here, rest assured that you will not be limited to naming your clauses in just this style. And when all is said and done here you can revert to 'regular' names if that is your final choice.)

6. Type the prefix you want to use in the Prefix box and the 'increment' (the amount of 'numerical space' between names) in the Increment box.
   - The prefix you choose should mnemonically hint at the subject of the book. It can be two, three or four characters in length. We are using 'wil' for 'Wills'. Maybe 'con' for 'contracts', 'pn' for 'promissory notes', 'bids' for 'bids'. Anything will works. And you can change your mind later on.

7. Type the starting name and number in the box labeled '1st Clause Name.' Actually, Pathagoras will suggest the name for the first clause. You can change that. Indeed, if you expect that your disassembled document will contain more than 100 clauses, we recommend that the first clause be named xxx0100. That extra '0' after the prefix adds lots of growth space.

8. Type AUTO in the Subject box. This is what tells Pathagoras to 'automatically' mark up your document with the appropriate elements

9. When you are satisfied with the set parameters, click the <Mark> button. Pathagoras instantly surrounds the highlighted text with the designated 'begin' and 'end' markers. It then types in the clause name, incrementing it as it progresses down the page. The subject element, however, will not e 'completed' (because at this stage Pathagoras cannot know what words you want to provide. Rather, a holding space is provided for the clause's subject, with the words "Type Subject Here" inserted just to the right of the name.

10. Provide a subject for each clause. The 'Subject' can be anything (to 'make up for', as it were, the 'naming' rules). The 'subject' should be relatively short (no more than 45 characters), but can, in fact, be of any length. As with all aspects of Pathagoras, don't spend too much time worrying about the subject. Changing it, if you find the need, is a very simple process.

11. Click the 'First' button in the BreakPoints section of the screen. The first section of text that meets the designated criteria will be highlighted.

   ⓘ The first and last words of the highlighted section will be indicated in the upper *left* quadrant of the screen. If you need to adjust the range of the highlighted text, us the up and down arrow sets to do so. Note that the upper arrow set expands or contracts the selection from the top. the lower set expands or contracts the selection from the bottom. (It is a quite typical need to adjust the scope of the selection. Pathagoras' automatic highlighting of text may frequently not coincide with the range you want the clause to actually encompass.)

   ⓘ Another 'tool' of interest in this section is the mini-scroll bar. Actually, it looks just like the arrow sets used to expand or contract the selection, only 'skinnier.' Use it to scroll the editing window when the top or bottom of the selection is not visible. (You can also exit the *Term Works!* screen to scroll the editing window, but you will probably find this technique a bit easier.)

> The automatic markup tool does away with the necessity of manually placing the begin and end markers at the top and bottom of the clause being marked, and of having to

be concerned with the proper pre-disassembly 'structure' of the clause. However, some users will find that once the first (or first several) clause(s) are marked, it is easier and perhaps faster to complete the remainder of the marking process manually. Remember that all Pathagoras functions are 'plain text' based.

If you want to finish marking the document for disassembly by hand, consider this:

- Highlight and copy the introductory section of a properly marked up clause.

- Paste what you have copied at the beginning of each section of the document that you want to become a new clause.

- Make appropriate modifications of the name and subject sections.

- Copy the closing marker from a properly marked up clause and paste it at the end of each section of the document that you want to become a new clause.

- Save the document. (Remember, we recommend including the word "Master" as part of the name.)

- Run the Bulk Add routine against this marked up master. (To access Bulk Add, click the "Clause Creation Tools" in the Pathagoras dropdown features list and select the Bulk Add tab. Follow the instructions.)

5   Term Works!

Term Works! has already been discussed in earlier section of this Manual. But a tour of the many features found in this handy tool is appropriate.

Term Works! is activated whenever you press <Alt-G> against highlighted text. You can also activate Term Works! from the Pathagoras features menu.
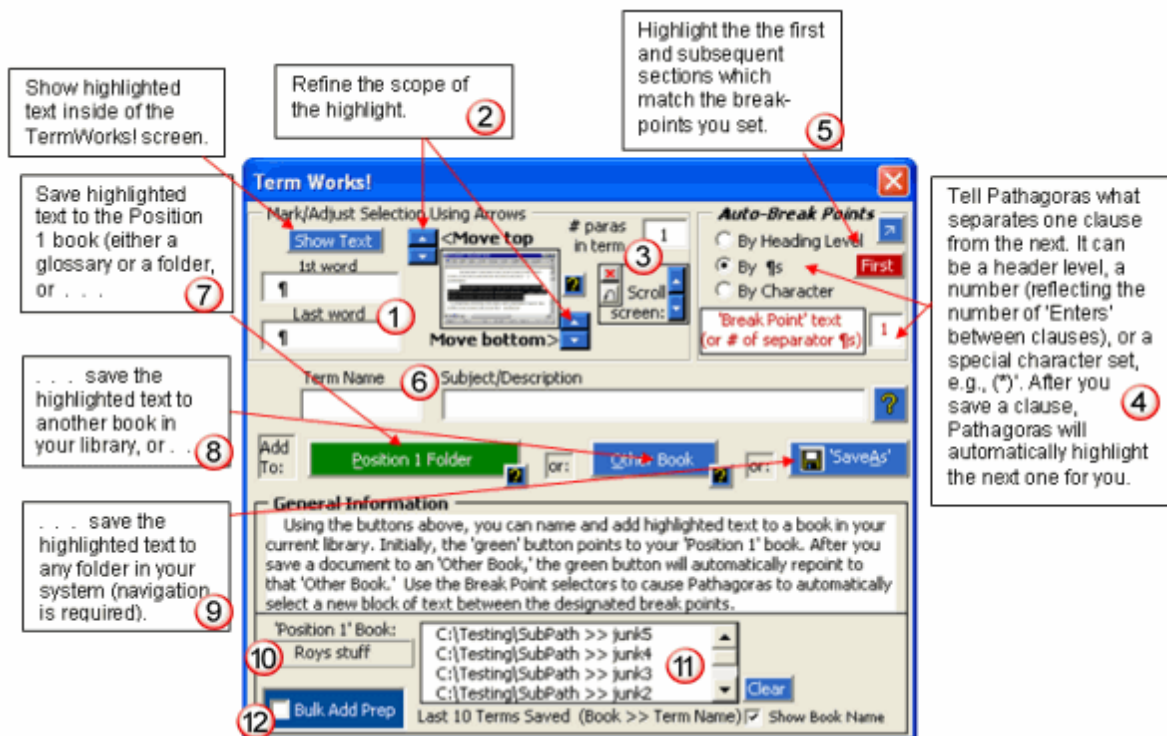
5.1   Screen Tour

Figure 1. The initial Term Works! screen.

Let's first take a brief tour of the major screen elements. Although a bit busy, it provides a substantial amount of information and options in a small area. All screen elements are functional and useful.

The upper part of the **Term Works!** screen reflects, sets, or allows you to manipulate, the boundaries of the text you wish to save.

(1) shows the first and the last words of the text.

(2) allows you to adjust the scope of the highlighted section of text. (Note the two up/down arrow sets, one for the start point of the highlight, the other for the end point. The <More> button, when clicked exposed 'left' and 'right' adjusting arrows to even further refine the selection.)

(3) Allow you to scroll the editing screen up and down without leaving the *Term Works!* screen

(4) allows you to set 'Break Point' criteria to enable Pathagoras to automatically identify successive sections of text for manipulation. (The "Break Point" field is discussed below.)

(5) Allows you to highlight the First and then subsequent sections of text that meets the criteria set in (4) below.

The middle section:

(6) provides space for naming the term and giving it a subject;

(7), (8) & (9) allows you to select the 'target' book into which you want to create a new term based on the highlighted text.

Typically, the 'green' button will read 'Position 1 Book,' reflecting the book occupying position one of the current library. If the term you are saving is named following the 'prefix/ suffix' style, and if the prefix is registered, 'Position 1 Book' (button 7) will be replaced with the book associated with the prefix. See Figure 7 below, and the text surrounding Figure 7.

The <Other Book> button (#8) takes you to another screen were you can direct Pathagoras to save the text in (a) one or more books from the current library, (b) the SuperGlossary (if assigned), (c) the SuperFolder (if assigned) or (c) the same folder in which the underlying document has been saved.

(Note that you can also click "Save As" (9) and move text into a folder 'free-style' and without book restrictions.);

The lower section of the screen is primarily informational.

(10) Advises you of the name of the book that occupies 'position 1' in your current ('default') library. (The 'Position 1' book is reflected in the 'green' button in most cases. See below for the exception. This makes adding to the 'Position 1' book that much faster.

(11) lists the last 10 clauses that you saved. (Click on any name in the list and the selected item is copies into the Name box. Edit as appropriate.)

(12) resets the screen to allow you to take advantage of TermWorks! automated Bulk Add markup tools discussed in the Document Disassembly section of the Manual.

5.2   Selecting/Refining Scope

Once the Term Works! screen is displayed, you first should decide how Pathagoras will determine the initial section of the text to highlight. (This assumes that nothing is currently highlighted.)
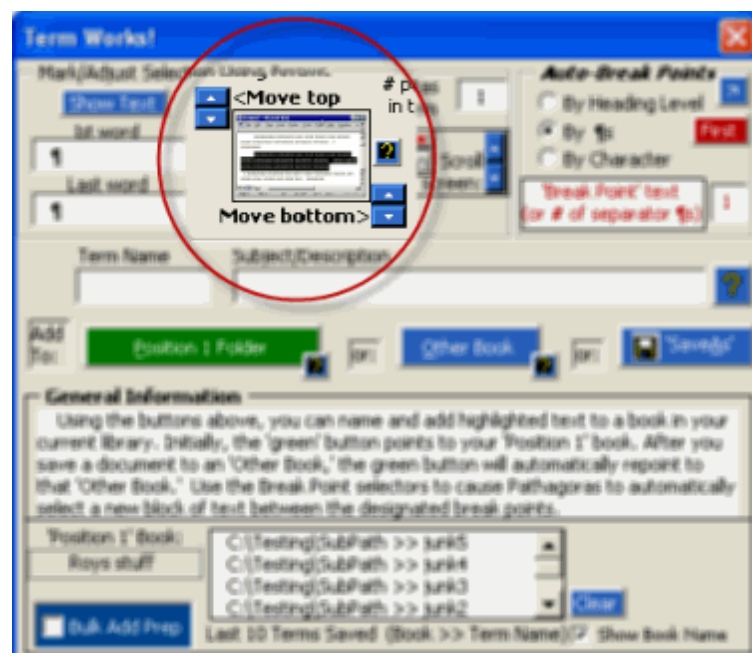
Your choices are:

(1) by document header;

(2) by the # of paragraph markers ('enters') between sections; or

(3) by a special character set. For this last choice to work for you, you must pre-typed into the source document those character at each location that you want a break to occur.

In the below example 'By Paragraphs' has been selected. The number of paragraphs which Pathagoras will look for to determine a section break is 2 (i.e., a 'double space'), and that value has been inserted into the box in the lower right quadrant of the Auto-Break section of the screen.
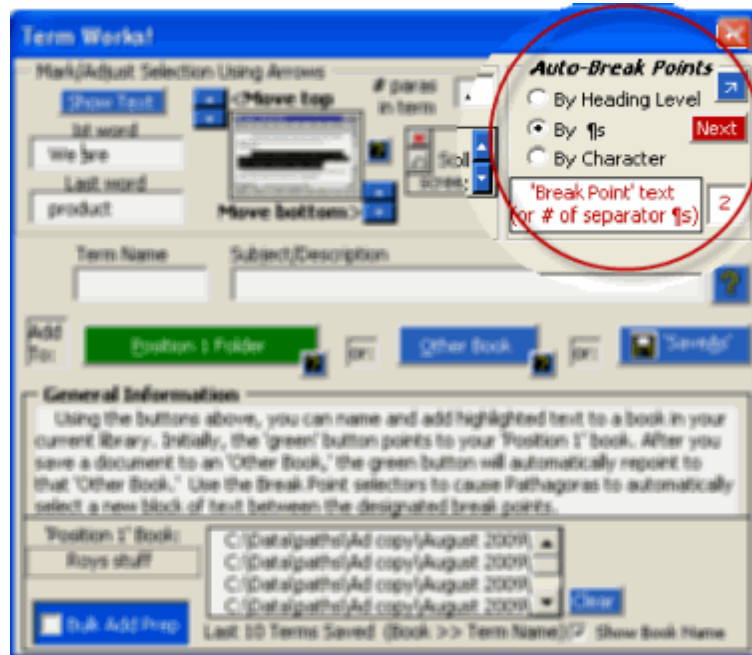
If the Next button is 'red,' click it. ('Red' just means that no text has yet been selected.) Pathagoras will highlight the first section of text in your document that meets the desired criteria. In the example we have chose, this will be the first block of text that ends with 'double-spaces.'

If you want to further refine the selection, use the up/down arrows in the upper left side of the screen. See below figure. This lets you expand and contract the scope of the highlight so that just the text you want is marked. (In a typical document dis-assembly session, Pathagoras will automatically highlight the next block of text after the last one was saved, but you may still wish to refine the scope of the selected text.)
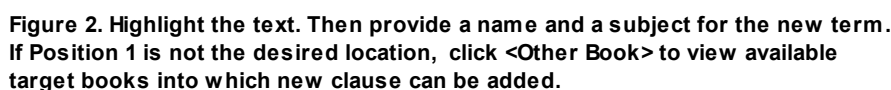
Expand or reduce the highlighting, from either the top of the selection or the end.

Note that you can add or subtract by paragraphs only, not individual words.

If you are using the 'Show Text' feature (discussed next), the text in the Show window is automatically changed as you change the scope of the underlying selection.

5.3   Add Clause to Existing Book

Adding clauses to an existing book ("Highlight & Add")

Adding clauses to an existing book is very simple, very fast and, we hope you will find, very elegant.

This is a piece of 'pretend' highlighted text. It can be text from any source. We want to add this text to an existing book. To do so, we simply highlight it and then press the keyboard combination <Alt-G> 'against' the highlighted text. That activates the Term Works! routine.

<<<<<<<<<<<<<<<< >>>>>>>>>>>>>>

When the **Term Works!** screen appears after you press <Alt-G>, provide a Name and a Subject for the new clause. (The name is typically a short phrase containing a bare minimum of identifying information. Standard document naming rules apply. The Subject can be (and should be) longer and more descriptive, and can include any punctuation not allowed in a 'Name.') Click the appropriate button on the 'target row' to select the book into which you want the term saved.

In our case, we want to add the new clause to the book that we just created in the opening lesson. Therefore, we will click <Other Book> so that more target locations will be revealed. See Figure 5 below.
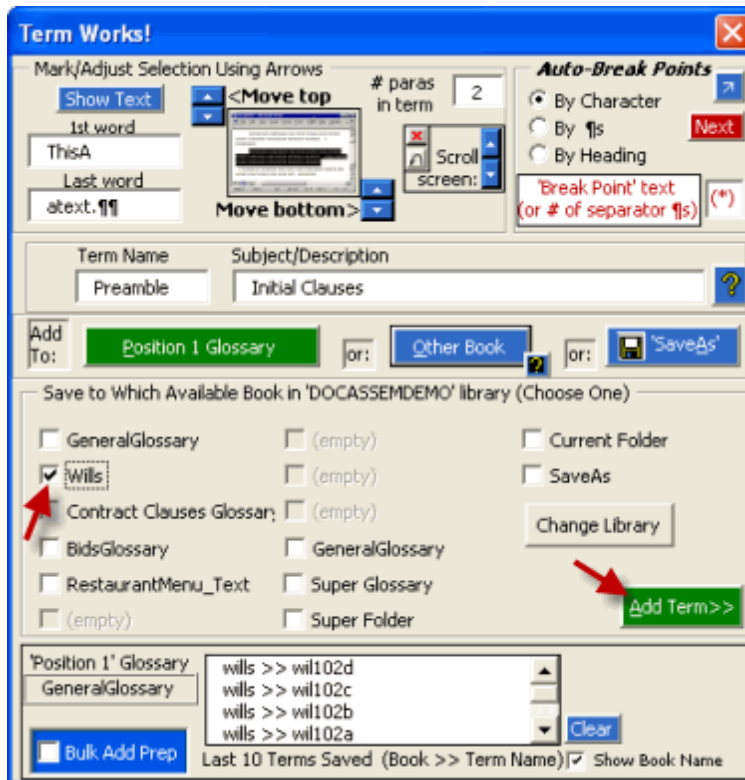

Figure 2. Highlight the text. Then provide a name and a subject for the new term.
If Position 1 is not the desired location, click <Other Book> to view available
target books into which new clause can be added.

Figure 3. Check the specific target book(s) into which you wish to save the new clause. Click Add Term.

Using this and other tools, you can further augment and refine the book to create a powerful, yet easy to modify and easy to understand, document assembly system.

Term Works! also can help you add clauses in rapid fire succession. All you need to do is provide either (1) the number of blank lines ("Enters") between each clause you want to add, or (2) provide a special character set that you have used to mark up a document for 'disassembly'. With this information, after you add one clause, Pathagoras will quickly jump to the next one, allowing you to quickly add a series (even a long series) of clauses into a book. Click here for a more detailed, illustrated discussion.

5.4   Creating New Book

Creating a new book with Term Works!

You will typically use **Term Works!** to add clauses to *existing* books. However, in the very early stages of your system's development, you may be creating new books from scratch.

1. Display the document from which you want to draw your first clause.

2. Highlight the text that you want to be the first clause. Example follows:

> This is 'pretend' highlighted text. This text can come from any source--an existing document, copied and pasted into Word from the Internet, anywhere.
>
> For this exercise, we want to add this text as the first term in the book. To do so, we
>
>   (1) highlight it (with the mouse, drag the cursor from the top left to the bottom right of the desired text. Word will 'paint it' the reverse colors to indicate the highlight) and

(2) Press the keyboard combination <Alt-G> 'against' the highlighted text. The Term Works! screen (Figure 1) will quickly appear.

Figure 1. A 'blank' Term Works! screen.

Note that the first and last words of the highlighted text appear near the top of the form.

The next steps are to (1) name the clause, (2) provide a subject to more fully identify the purpose of the clause and (3) select where to save it. Because we are adding a new book, the middle "Other" is an appropriate choice.

Figure 2. Provide name (1) and subject (2) and then click 'Other' (3).

**Figure 3. Since we are starting a new book, click the "Create New Book First" box.
Then click Add Term.**

Pathagoras will ask you whether you want the book to be a glossary or a folder of terms. See the

discussion above as to which is 'better.' Then it will ask where you want to save the new book. Navigate to the desired location. Pathagoras will save the text in the new book, using the name and subject you provided.

5.5   Prefix/Suffix Naming

Pathagoras, Term Works! and the Prefix/Suffix Naming Convention.

▪ We strongly recommend that you use of the Prefix/Suffix naming style for naming your documents. The main reasons are set out at this link: Prefix/Suffix Naming Convention

▪ And more to the point in the lesson covered here: If prefixes are currently in use, and if you want to add a new clause to your book named with the appropriate prefix, Pathagoras' Term Works! screen will automatically point you to the desired book.

Let's say you have text that you want to add to a book which follow the prefix/suffix style. (We must also assume that the prefix has been registered. This is an easy step, but you are referred to the section of the Manual referenced above for those steps.)

Highlighted text you want to add. Active the Term Works! screen. Type the name of the clause using the prefix/suffix style. Pathagoras will automatically 'sense' the name as being in the prefix/suffix style and will re-point the green button to the proper book.

Here is a picture. The prefix for the WillGlossary is 'wil'.
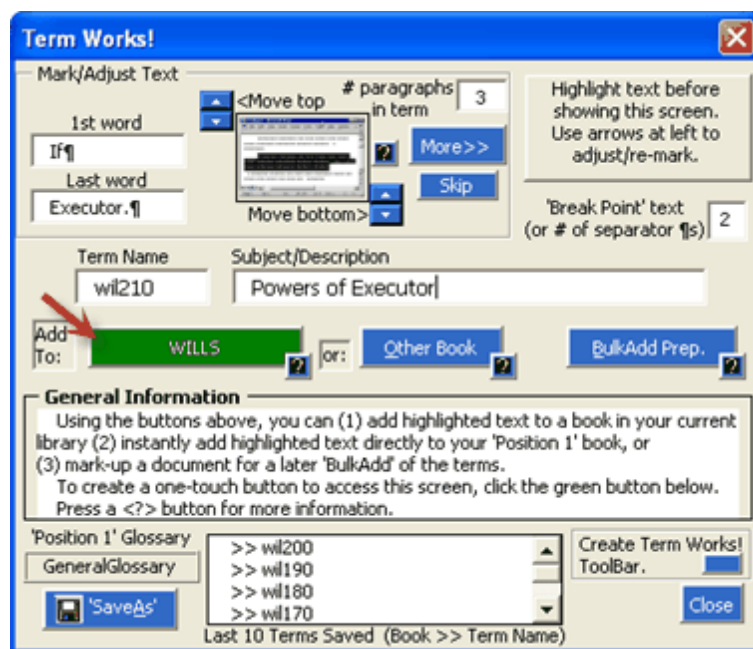
**When the term name with prefix 'wil. . .' is typed,
Pathagoras locates the WillGlossary and offers to save the new term there.**

5.6   Bulk Add connections.

Term Works! and Bulk Add.

You can use **Term Works!** to help you to pre-mark clauses in preparation for using the Bulk Add procedure. So, instead of manually typing the 'begin' and 'end' markers into the master

document, you can use **Term Works!** The text in the Bulk Add section of this Manual will show you step by step how it is (quickly) done.

5.7 Show Text
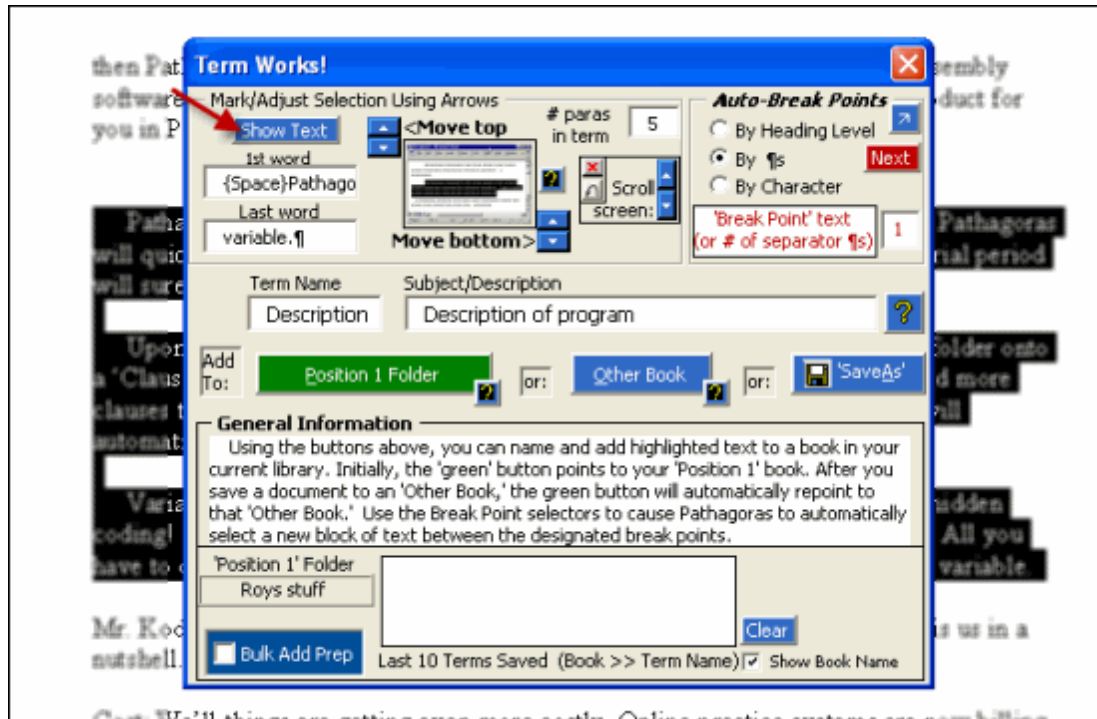
If the Term Works! screen covers up too much of the underlying text (or you simply want to see the text that has been selected), click the <Show Text> button. The TermWorks! screen expands and displays the highlighted text in a box to the right. See image below.
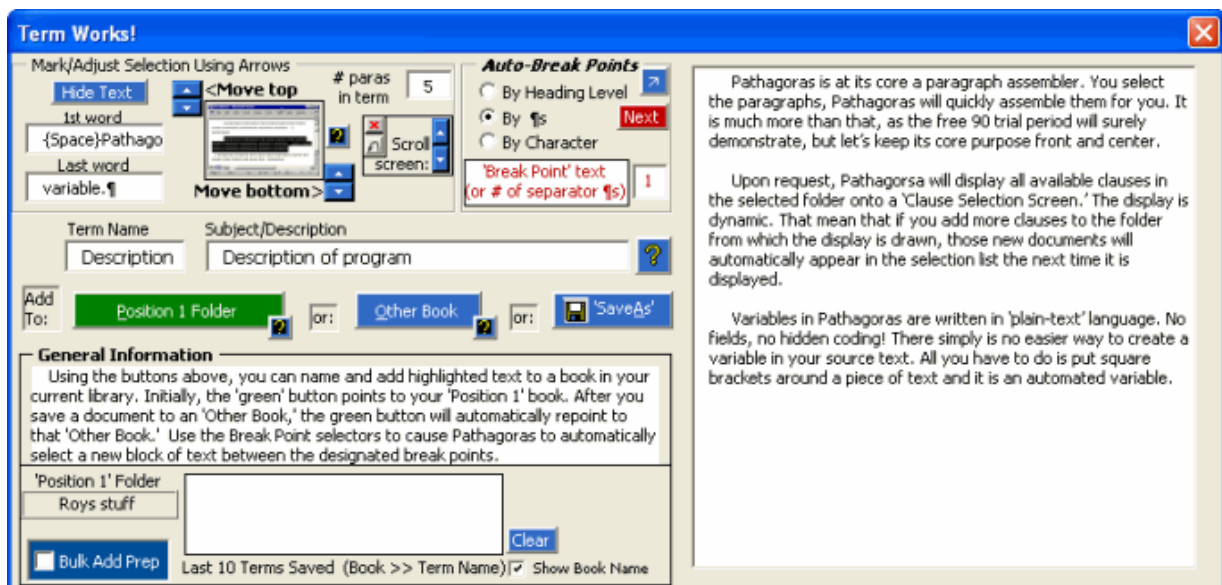
Whenever you change the scope of the highlighting, the text shown at the right will also change. (Note: You cannot edit text in this box. You can only do that within the actual document.)

5.8 Add text Where?

Once you have selected the first block of text that you want to break out, you need to decide where you are going to save it. The Term Works! screen offers 3 choices:

You can quickly save highlighted text to the Position 1 book (either a glossary or a folder, or . . .

. . . you can save the highlighted text to another book in your library. (After you select a different book, the 'green' button changes to reflect the new selection so you won't have to leave this page for subsequent additions.) Or you can . . .

. . . save the highlighted text to any folder in your system. (Simply navigate to the location your desire.)

(1) The 'Position #1' book. This refers to the glossary or folder that sits on bookshelf #1 in your active Library. The actual name of the glossary or folder is shown at the lower left quadrant of the screen, next to the 'Last 10 Terms Saved' listing;

(2) Another book in your current Library; or

(3) Any where else you please. If you are a beginner and have not created any books just yet, you should just click the 'SaveAs' button.

When you click any of the above buttons, Pathagoras will transfer the selected text (with all formatting retained) to a new document. Then, if you selected:

(1) (Position #1 book) Pathagoras will insert the text into a new document in the selected folder (or a new term in the selected glossary.)

(2) (Another book), Pathagoras will open a screen displaying your current library, from which screen you can select the appropriate book into which to save the text.

(3) (SaveAs) Pathagoras will display a standard Word 'SaveAs' screen and allow you to navigate to the location to which you wish to save the text. (Pathagoras requires no special location for its clauses, so the choice is yours. The default is going to be the folder in which the source document resides. Our suggestion: create a sub-folder here and save the text in that sub-folder.)

Once you have completed the save, Pathagoras will offer a 'Continue process?' option. If you select it, Pathagoras will save and close the new document, return to your 'source' document, and highlight the next block of text that comports with the set parameters. This is the 'automatic' part, and makes your disassembly of a document incredibly easy.

Note one other thing: The long green button beneath the Term Name box now reflects the name of the book or of the SaveAs folder into which you saved the initial clause. If you wish, you can just click on the green button to save your next clause(s).

5.9   Setting Term Works! Defaults

You can set the default settings and appearance of the Term Works! screen via Pathagoras comprehensive 'Settings' screen:

1. Call up the Utilities/Settings screen.

2. Click the <All Settings> button.

3. When the Setting and Options screen appears, click the Term Works! tab. This is what you will see:
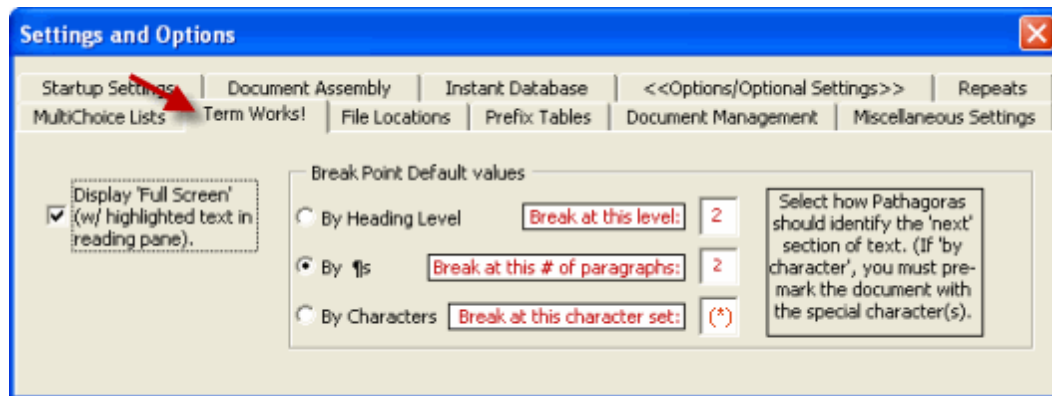
Check, click and complete the desired 'default' values (the values that the Term Works! screen will 'open' with the next time you call it up) and close the screen.

5.10   Hints and Tips for Document Disassembly

Do I have to complete the Subject field?

Well, it's not *mandatory* that you do so, but we recommend that you always complete the subject field. It can never hurt. Plus, as you are building more an more sophisticated systems, you will find that having pre-planted a subject, even in your early documents, will be very useful to you.

Maybe this will help you to decide. Think of the purpose to which you are going to put the various pieces of your dis-assembled document. If you don't plan to recall terms using the Alt-G hot key, and plan only to recall terms via a DropDown List or Clause Selection screen, you can get away with not attaching a subject. (When you don't assign a subject, Pathagoras will still do it for you, attaching the documents name, sans the .doc or .docx extension, as its subject.)

Let's assume the following. The document you want to disassemble is a list of names and addresses. (Remember, Pathagoras can handle anything!) Here is a sample list.

John Q. Adamson
Suite 232
12345 Main Street
Jamestown, VA 23696

George P. Washburn
443 Apple Tree Lane
Mt. Vernon, VA 23876

Thomas W. Jeffers
543 Independence Blvd.
Monticello, VA 23567

What names do you want to assign to each address? Of course you could call the first one "Adamson, J.Q. Address" and you will know exactly what it is, but that is a lot of typing for a supposed 'shortcut.' Even better: 'jqadamson', or 'adamsonjq' or even better still: 'jqaadd' (the latter reflects the initials plus the suffix 'add' to indicate an 'address'. (Following this pattern, you could use 'jqaph' to represent a phone number.)

It is simple to type any of the the above to the screen and press the hotkey combination <Alt-G>. Instant address!

But how will you or others in your office recall all of your addresses. Some you will memorize. Others you will need a list. And that's where the Subject line comes in. Pathagoras can maintain the relationship between the 'short' name and the 'complete' subject. So, while the document or glossary term name might be jaqadd, you can display the subject "Adamson, JQ." in any DropDown List or Clause Selection screen. It really is the best of both worlds.

> **Note:**
>
> The '(*)' method of marking up text to show major section breaks is used in several modules within Pathagoras. It is used within TermWorks! (discussed in this section, within the Bulk Add routine (next) and within the Instant Book routine (second next).
>
> Keep in mind that '(*)' (or whatever character set you choose) is just text. It is definitely not 'code'. It has no special meaning to Pathagoras beyond marking a begin and end point where these functions might look to perform their respective functions.

6   Miscellaneous Issues

Enter topic text here.

6.1   Select Document to Disassemble

The first step in any document disassembly session is to select the document that you wish to disassemble. Any document will do, but it should be one that contains the essential aspects of (1) the content of what a good final document of that genre should contain (the substance) and what it should look like (the layout).

Don't worry that what you select is not a 'perfect' document. You can 'throw away' extraneous text and augment later what you feel is missing. Pathagoras is very accommodating in this regard.

• Copy or move the selected document into its own folder.
 This folder should be where want the book (the final disassembled product) to reside.
 Don't fret to much about location. Pathagoras doesn't care where you store files. However, let's be a little 'practical' here. If the document from which you wish to harvest clauses is currently sitting in a 'Client' folder, you should move it to a more appropriate 'office forms' folder.
 If the source document is your 'real estate rental agreement,' name the folder something like 'Rental Agreement Clauses'. And perhaps that folder should be located under a more topical 'Real Estate' parent folder. (Pathagoras will operate just fine with randomly placed folders, but your overall office goal should be to work with well organized forms folders. It just makes life easier.)
• Rename the document to include the term "Master" (optional).
 The word "Master" is not mandatory, but we suggest it in order to distinguish your marked up document from its source. The Master document (whatever its name) will contain the markups discussed in the following pages.
• Keep the Master

We encourage you to save this Master and to make all future changes (simple edits, add new clauses, renaming clauses and subjects) to this document. That way, if you wish to perform a disassembly routine a second (or third, etc.) time (but now on future-modified Master), it becomes easy to do so. You never have to 'start from scratch' with Pathagoras style of document dis-assembly.

6.2   Names vs. Subjects

Pathagoras maintains two attributes regarding each document or clause.

- **'Name'** is the obvious one. All documents have names. It is the actual document name to which this attribute refers.

- **'Subject'** Sometimes a document's name will have little meaning to the operator. Pathagoras takes advantage of the property field called **'Subject'** (meta data within every Word document) to maintain a 'better' description of the document or clause.

Pathagoras can readily display both the name and the subject assigned to a document. The radio buttons found on both the Libraries & Books and the Clause Selection Screen allow you to quickly switch between the two. (If no subject is assigned to a document, Pathagoras will 'repeat' the document's name as the Subject when that option is pressed.)

> The Clause Selection Screen actually displays both the Name and the Subject simultaneously. If **Name** is the primary display, the Subject is displayed in blue text at the bottom of the screen just beneath and between the two panels. If **Subject** is the primary display, the clause's name is displayed in the blue text.

6.3   Pathagorize the Document

Regardless of the dis-assembly method you choose, you should Pathagorize (neuter) the document as much as possible before disassembly. This will help to assure consistency.

- Convert 'real' names, addresses, quantities, dates, etc. to plain text bracketed variables as possible.

- Denote optional text blocks and create options blocks.

- If you are working on a source document that has 'real' names that run throughout the document, don't forget about Pathagoras' Create Variables Assistant. The Assistant lets you highlight the first instance of the name, and to replace each occurrence of the name with a variable in a single action.

- If you want paragraphs which automatically renumber themselves, you should assign the automatic numbering fields before the disassembly. This will assign the identical auto-numbering parameters needed to insure proper numbering when the disassembled clauses are reassembled.

Here is the most important piece of advice. Don't worry about getting everything right! Because of Pathagoras' plain text underpinnings, you can always 'Pathagorize' some now, disassemble the document, and edit more later after you see some results. And as far as editing goes, you can either return to the Master document, Pathagorize it some more, and then disassemble again, or just edit the individual clauses that you disassembled the Master into. Your choice.

6.4   Deciding on the Scope of a Clause

As you are marking your document for dis-assembly, and deciding what should be a 'clause,' remember that not every paragraph or bullet point needs to be a separate clause.

One of the most common 'mistakes' made by the novice user is to disassemble every paragraph of a document, only to have to reassemble those paragraphs each time during the document assembly process. Be mindful of what needs to be a separate clause and what does not.

Clauses can span many paragraphs. If certain bullet points, paragraphs, or other text block always stay together, mark them as such. If you determine that a collection of paragraphs that you left 'intact' really should be further broken apart, you always can do so later. (Likewise, if you were overzealous in your disassembly efforts, you can later recombine clauses into an appropriate single term by remarking the Master and re-running the disassembly.)

Be mindful that a clauses can be anything. Of course, it can be text, but the scope of a clause can also encompass charts, pictures, embedded spreadsheets. Anything.

The '(*)' method of marking up text with break-points is used in several modules within Pathagoras. That particular character sequence is not mandatory. You can use whatever characters you choose. Just be sure that the break-point characters do not otherwise appear 'naturally' within the document.

6.5   Editing the Results

After you have successful dis-assembled a document, study the results. If you don't like what you see, edit as appropriate.

You will have two basic editing choices.

- If you just need to change a clause or two, simply navigate to the folder, recall the clause(s) and edit away. Remember that you started in, in every intermediate stage remained in, and ended in, Word. All Word editing tools are fully functional at every stage.

- If the change you seek to accomplish is larger in scope or 'universal' (for example, you want to rename or renumber the clauses, change the prefix, change [variable names], change subjects, change styles, etc.), return to the Master document (if you used the 'Bulk Add' routine) and make the changes there. Once done, rerun the routine. The new will replace the old and you are ready to roll. (It is this ability to return to the Master to make changes and re-run Bulk Add that makes Bulk Add exceptionally attractive.)

- You can also change the names and subjects of the clauses in your new book using the Names & Subjects Editor.

After you have dis-assembled your initial set of clause into the various building blocks, and even after you added and duplicated clauses before performing the Bulk Add or Instant Book routine, you will probably find that there is still just not enough 'variety' to build all the documents you envision. Not to worry. You can easily add new clauses to any library with ease and elegance.

A whole section of this Manual is devoted to the topic of creating clauses and augmenting your books and libraries. Click the link to read more about the wide variety of techniques available to you.

At the end of the process (if there ever really is an 'end' to adding new and useful clauses to your books), you have a great system of alternative clause from which any kind of document of that particular genre can be built.

We are asked 'which is the best way to break up my documents?' Well, there is no 'best way'. Read about the two major methods and adopt the one which best suits your needs.

6.6   Building Blocks

Now that I have all of these 'building blocks,' what can I do with them?

Think if your collection of clauses as Legos. Next, recall all of the newspaper articles and Internet videos showing what talented people have done with Legos. Absolutely everything! The same applies to Pathagoras building blocks.

With your clauses from a variety of documents now disassembled into building blocks, and properly categorized, you can:

- Assign the collection of clauses to a book so that you can build simple to complex documents by selecting appropriate clauses.

- Assign the collection of clauses to a DropDown List. That way you can insert a single term into your document by a simple 'point and click' operation.

- Create clause-sets.

- Create clause-sets of clause-sets.

- Quickly access and edit any term.

- Easily add additional text to the building blocks collection:

  ➢ Click here to learn about adding text into an existing book.

  ➢ Click here to learn about adding text into a DropDown List

- Make changes to your Master Document. Disassemble the revised Master and you can have an updated, refurbished system.

- Rename or 'resubject' some or all of your clauses using Pathagoras powerful Name & Subjects Editor.

Now matter how simple or how complex the project, Pathagoras provides the tools to make it happen. Only your imagination limits what you can accomplish with the building blocks you have created.

6.7   Building Blocks vs. Templates

'Building Blocks' are snippets of text designed to be called into a document under construction 'one at a time.' Assembly is typically accomplished via the Clause Selection Screen.	Templates are 'complete' documents. They typically contain automated <<*Optional*>> text blocks that allow the user to choose whether that block of text should be kept or deleted.

> **A major decision that you, as the systems designer, will have to make in creating your document assembly systems is whether to build the system based on a 'building block' model or a 'template' model. The text in the below section will help guide you in making that decision.**
>
> **But as you read the below text, keep in mind that it is really not an 'all-or-nothing' decision. Our approach in designing Pathagoras was to provide you as much flexibility in system design as possible. You can mix the two approaches and easily go back and forth as you need to and learn more about how your end users will be using the source document. And if you commit to one approach and decide to adopt the other, not to worry. Pathagoras provides the tools needed to make the switch.**
>
> **To the extent that we can recommend something to you, we encourage, and have built our demo systems around, the 'building block' method, with judicious use of Options and Optional blocks (a 'templates' feature) within many of the clauses.**

Pathagoras offers two distinct approaches to document assembly. Despite the title to this section Building Blocks *VS* Templates, the approaches are not opposites. Rather, they complement each other quite nicely when you fully understand the strengths and weaknesses of both.

At the outset, you will make some decisions as to the basic approach you want to take. However, those decisions are never etched in stone. Pathagoras makes it easy for you to change your mind.

Let's discuss the two basic approaches.

"Building Block" Assembly: This is also what we refer to as 'paragraph assembly.' You would maintain a collection of text snippets, each saved as individual documents in a particular folder. Each snippet would typically represent a 'stand-alone' section of a larger whole. (As used here, 'snippets' and 'building blocks' are identical concepts.)

- Sometimes the snippet is a mandatory part of the document;

- Sometimes the snippet is an optional clause. It will be called into some documents, but not others.

- Sometimes the snippet is one of several alternative clause. One of them will always be called in, but not necessarily all of them. These snippets might be labeled "ChoiceA", ChoiceB, ChoiceC.

Collectively, the snippets represent all of the possible text choices regarding a particular type of document.

In a typical document assembly session, a user would select the book that contains all of the clauses. (A book is simply a pointer to a folder that you have designated.) Pathagoras reads the contents of the folder and displays all of the available snippets (i.e., documents in the folder) onto the 'Clause Selection Screen' (in the left panel). The user would select the clauses needed for the particular client/customer, moving the clauses from the left panel to the right. When the proper clauses are at the right, and in the proper order, the user clicks Next>> and the selected clauses are instantly assembled into a new, unique document.

Keep in mind that what is being displayed in the Clause Selection Screen are the documents in a folder. (Pathagoras doesn't know that they are just 'snippets' of text.) The beauty (and elegance) of such a system is that if you add more building blocks/snippets to the folder, they will automatically display on the Clause Selection Screen.

Advantages of the 'building block' approach:

- it is easier to effect a change that affects multiple documents. Let's say that you moved your office. Your office's address appears in the signature block of every single document that you create. If you assemble documents via the 'building block' approach, you only have to change the one block and it permeates all future documents built with that block. (The alternative, of course, is to open each template and make the address change in each.)

- when you need just a single clause, it is easy to point and click it in. Pathagoras' DropDown Lists make this easy.

- you can call in a single clause simply by typing its name to the editing screen and pressing <Alt-G>. Depending upon how the clause is named and where it is stored, Pathagoras can typically find the clause almost immediately and insert it into your document with your having to navigate to find it.

    o If the clauses are named following the prefix/suffix naming style, and the clause will be called directly from the folder or glossary which has been associated with the prefix. Response time is practically immediate.

    o if the clause has been saved in one of your SuperBooks, Pathagoras will hunt it down there, again practically immediately.

Document Assembly by Templates: A template contemplates a complete (actually, overbuilt) document. It typically had all, or at least most of the text that a standard (and perhaps super-standard) document of its type would contain. Variables (placeholders for personal information, addresses, dates, etc.) are strategically placed throughout the document. During the document assembly session, the end user will provide the personal information. Frequently a template will be overbuild. It will contain text sometimes stays in, or sometimes is deleted, depending upon the specific client/customer circumstances or desires. Those text blocks can be marked as

<<*Optional*>>. Sometimes the text block should reflect choices. Those can be marked as <<*Options*>> blocks.

Advantages of the 'template' approach:

- It is conceptually easier. There is only one new concept being introduced to the document assembly beginner -- the concept of variables that need to be completed to end up with a final product. It simply is easier to learn one new thing at a time. (So the suggestion to the system administrator is this. 'Pathagorize' a template and use it to introduce the users to the concept of document assembly as variable completion. Later, dis-assemble the template into its component parts and see if 'clause assembly' might work better for your office.)

- For the document assembly administrator, template assembly is likewise quite a bit easier to implement. You don't have to 'disassemble' a document into its component parts. (While we recommend that you eventually adopt the paragraph assembly approach, it is not necessary at the outset. Document *'dis-assembly'* can be postponed until a time when you and the office is 'ready' for that new dimension.)

- Formatting and style management can be more easily controlled within a single document. If your office uses (either intentionally or inadvertently) mixed styles, you may get unexpected results when you assembly clauses by snippets. The proper 'solution' is to make the styles uniform across all snippets and templates, but the 'advantage' of templates is that you don't have to mess with this right not. You just need to make the particular template internally consistent.

- Since templates are complete documents, the end user initially sees a result that is more complete and perhaps more intellectually satisfying.

- Other document assembly systems tend to favor this approach. Therefore, it is perceived to be an industry 'standard'. And it you have tried another system, that will be your default 'assumption' and bias. That is perfectly okay, but to the extent we can begin moving you over to the concept of 'snippets,' you can dramatically improve document assembly efficiency.

Pathagoras and the 'Industry Standard'

The industry standard for document assembly is the 'template based' model described above. Pathagoras allows, but does not promote, that standard. The reason why Pathagoras does not embrace the industry standard is that the standard has not worked. Document assembly as an office 'product' has been around for more than 15 years. Very few people and offices use it, even though 10s of thousands of copies of those program have been sold.

In the long run it is tougher and more confusing to try to push an entire document, which run the gamut from simple to complex, into a template. Templates can become exceedingly long, complex and time consuming to 'program.' (And make no mistake about it -- it is programming to mark up a document to say 'keep this if this condition exists, and delete that if these conditions exist). That is why so much document assembly 'software' has become document assembly 'shelf-ware.' Administrators were finding that they couldn't write the logic blocks accurately. End users were overwhelmed by having to learn a new program. The program was shelved until more time could be found to implement it. That time was never found.

With paragraph assembly, the clauses are still selected by the end user, but the administrator does not have to be a programmer. Each separate clause is self-contained. No options text to type, not programming-like code to create. Just simple plain text clauses that assemble quickly and accurately.

Notes: Except for the fact that a 'paragraph' is typically smaller than a 'template,' there is no technical difference between the two concepts. They are both 'documents' as far as Pathagoras or any user can tell. Each can contain [bracketed variables]. Each can contain <<Options>> and

<Optional>> text blocks. Each can contain references to other clauses (set out between "<<" and ">>" markers.)

The main difference between a 'building block' and a 'template' is the average size of the file. Building blocks are intentionally short. They are designed with the sequentially cobbling of one clause after another one in mind. Templates are intentionally long. They are designed with presenting the whole, and 'keeping' or 'deleting' optional text in mind.

So, keep this in mind. No matter how complete the template might be, it likely won't contain *every* possible option within its four corners. So you will likely have a need for at least a small library of building blocks that you can quickly reference for that additional text needed to put on the final touches. And not every building block should be free from options and optional text blocks which are typically associated with templates. Use them when you need them.

6.8   Naming Rules

A clause can be assigned any name you wish, subject to just a few naming rules and conventions:

'Name' rules:

- **Document Naming Rules:** A document can contain any combination of letters, numbers and keyboard characters, except that the following characters cannot be used as part of a document name: *, &, ?, /, \, :, ;   You cannot use slashes or colons in your term names. If you are going to be adding terms to a glossary (as opposed to a folder of clauses), 'bookmark' naming rules will apply. This merely means that the name must begin with a letter, and contain only letters and numbers (and no spaces). The name may contain an underline ('_') character.

- **Glossary Term Naming Rules:** Glossary names have a few more restrictions. Word's bookmark naming rules apply. A bookmark name can contain only standard keyboard letters and numbers and the underscore character, and the first character must be a letter.

'Subject' rules: A 'Subject' should be provided for every clause and document so that a future operator will be able to understand the purpose and use of the term. There are no character limitations to a Subject. But you should keep the 'size' of the subject to no more than 60 characters. This is a display issue, not a rules issue.

- The 'Subject' of a document can be found under the Document Properties element. To display Document Properties, the document must be open. Click File|Document Properties. Edit freely if you wish.

- In a glossary, the Subject is no more than the blue text which appears below the red 'clause name' and immediately above the actual text of the clause.

You can also add a subject to an existing document using the SaveSmart module:

- Display the document. Click SaveSmart.

- Click the Show Subject checkbox.

- Type or edit the subject in the text box provided.

- Save the document.

Editing Subjects: Because of the simple, Word based locations in which subjects are saved, it is quite easy to change them. We encourage you to do so freely. When you modify a subject, the new subject will display the very next time you display the Clause Selection Screen or print out a new terms list.

―――――――――――――――

Editing names and subjects en masse:

- To change the names or subjects of an existing folder of terms or a glossary, use the "Names

and Subjects Editor" found under Editing Tools. See [Editing Names & Subjects](#)

- If you convert a folder into a glossary, the rename occurs *en masse* as well. You can instruct Pathagoras to assign each term a new name following the prefix/suffix naming style as they are being moved into the glossary. The 'old' name becomes the 'new' subject. It is a 'best of all worlds' situation. See [Folder to Glossary](#)

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Pathagoras prides itself on providing prompt, useful and personal customer service. While we hope that this Manual and the other instructional materials are helpful, you can still count on the 'personal touch' of Pathagoras' customer service as a 'first line' of help as well.

We truly enjoy hearing from our customers and potential customers. While we cannot promise that you will never receive a voice-messaging service if you call us, more likely you will receive a live person at the other end. But if you do get our voice mail, just leave a message. We will call you back promptly.

Contact information is spread across as many places as we could find so that you do not have to hunt for an email address or telephone number, and we repeat it here. Let us know if we can ever be of service.

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