



THE PATHAGORAS™ SYSTEM

'The 7-day Plan'

*(Just 15 Minutes a Day
to a Stronger, Leaner
Document Assembly System)*

Seven Days to
Learning and Effectively Using
Pathagoras

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**Document Assembly
Document Automation
Document Management**

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Introduction

Now that you have downloaded and installed Pathagoras, don't let it just 'sit on the shelf.'

Give us just 15 minutes a day for the next week and we will show you how you can implement a truly elegant document assembly system, all without having to create complicated fields, remote tables, hidden codes and ancillary control files.

Alternatively, you can compress all of the lessons into just a morning or afternoon session. Figure 60 to 90 minutes.

Whether your objective is to prepare complex contracts or speed-up the production of your daily letters and other correspondence, Pathagoras offers an effective, plain text, easy solution.

There are two things of which we are quite confident:

- (1) Pathagoras *will* save you time. And it can do so quite early in the learning process.
- (2) There will never be 'more time' if you do nothing. So let's go for it. 'Nuff said?

We presume that you have already installed Pathagoras and that you can see the Pathagoras tab in the ribbon area of your Word editing screen. If you have installed Pathagoras but cannot see the Pathagoras tab, something is wrong. Write to us at support@pathagoras.com, or checkout the other ways to contact us on [page 19](#)²⁰ of this guide, and we'll get you up and running in no time.

Note: You do not have to consult with your doctor before beginning these exercises.

Other resources: The [Pathagoras Guide](#) is the primary resource for the program. It is highly illustrated, indexed and detailed. It covers all program features. About 700 pages in length.

A companion to this publication is the "[Beginners Guide to Pathagoras](#)." It is highly illustrated, and, like this pamphlet, contains only bare bones 'start-up' information.

Day One: 'Pathagorizing' your first document

Today's Goal: Automation of simple variables.

Plain text square brackets surrounding a word = an automated variable.

Note: The steps described below are also illustrated in these references:

Video Tutorial: [Creating Variables](#).

Pathagoras Manual: [Simple Variables](#) and [Multiple Choice Variables](#)

Our first lesson demonstrate how basic automation can be quickly and easily added to any document.

(1) 5 Minutes of 'Play Time'

- a) Display a blank document.
- b) Type the following variables* into your document:

[Date of Letter]

[Client FirstName] [Client LastName]

[Client Address]

Dear [Mr./Mrs./Ms./Dr.] [Client LastName].

(If you are viewing this Pamphlet electronically, you can just copy and paste the preceding text into your document.)

- c) Add one or two other variables to your document. Just make up something. Remember, we're playing here.
- d) Press the keyboard combination <Alt-D> ('d' stands for 'database'). Pathagoras' Instant Database screen will appear. This screen is the pathway into many other neat Pathagoras features, but for now, let's try the easy stuff.
- e) Click the button labeled <Scan> in the lower left corner of the screen. Pathagoras will instantly 'scan' the document and locate every bracketed term on the page. It displays what it finds on the left side of the page. Any multiple choice variables it finds (e.g., [Mr./Mrs./Ms./Dr.]) are transformed into a selectable drop down list.
- f) Type at the right side of the screen a value for each of the variables you see at the left. Anything you want to type is just fine. For the multiple choice variable [Mr./Mrs./Ms./Dr.], select the value from the list.
- g) When ready, click the **Next>>** button. Pathagoras will ask if you want to save the variable-to-value pairings as a 'record'. (For now, just say 'No'.) Pathagoras will then replace all of the variables with the values you provided. Quick, easy, elegant. And most importantly, *fast*.
- h) From this simple exercise, you should be able to sense that Pathagoras has the ability to automate your documents with very little setup on your part. Now let's move on to a more practical example.

*A 'variable' is a holding spot in a document. Each variable will later be replaced by a 'real' name, address, quantity, etc.

(2) Now for the real thing:

- a) Pull up an actual document or letter that you want to convert into an automated form. It could be one that you have previously prepared for an actual client or customer. (For now, select a short one. Save the more complicated ones for later lessons.)
- b) Look for 'personal' values in the document. Here we mean names, addresses, dates, values and the like. Surround each name, date, etc., with square brackets. (like you did in 'play time.')

So, "John Q Doe" might become '[Client Full Name]'; "123 Main Street" might become '[Street Address]'.



Make the variable name descriptive enough so that a user other than yourself will know what the variable is calling for. For example, the variable "[Date]" is 'legal', but is not particularly helpful to one not familiar with the form or letter. So consider '[Date of Letter]' or '[Date Contract Signed]'.

- c) Create a multiple choice variable. Type two or more items (names of people, address, ice cream flavors, etc) Use simple slashes to separate each choice.

****All text within [square brackets] are now automatic variables.****

- d) Save the document to a folder where you keep forms. If you don't have such a folder, create one now.
- e) Recall the document you just 'Pathagorized' to your editing screen. Pretend that you have a new client or customer for whom you need to prepare this form.

➔The exercise you are about to perform (replacing text in the *original* document) is something you would normally *never* do. Pathagoras has tools (covered in tomorrow's lesson) to insure that you assemble and personalize using only *copies* of documents, never the original. That prevents accidental overwrites of source text. But for today, just make sure you do not save (and thereby overwrite) your original document after you have finished testing. ⬅

- c) Press <Alt-D> to display the Instant Database screen. Click the <Scan> button in the lower left corner of the Instant Database screen. Pathagoras instantly identifies each bracketed variable and presents them on the left side of the screen.
- d) Fill in the blanks in the right side of the screen with an 'appropriate' value.
- e) Click the **Next>>** button. Say 'Yes' to the 'Save as New Matter Record?' question and provide a name for the record. The client or customer's name, last name first, is a typical record name. Since we are not yet in production mode, "Junk" is an okay name, too.
- f) Click **OK** and Pathagoras will (1) save the data and (2) quickly replace each variable in the document with the personal data you provided in the form.
- g) Study it and smile. Close, *but do not save*, this document.
- h) Just a check on the database thing. Press <Alt-D>. Drop down the 'Existing Records' list in the upper right corner of the screen. See your record there? Click it. Do you see why we call this the Instant Database?

If you have just a bit more time today, 'Pathagorize' and complete another document or two. Keep the variable names consistent from document to document. (Pathagoras has tools that help with consistency. We will discuss them later.)

Day Two: DropDown Lists

OBJECTIVE: Even Faster Way to Call up your Documents.
Pathagoras **DropDown Lists** (up to 10 of 'em.)

Note: The steps described below are also illustrated in these references:

Video Tutorial: [Creating DropDown *Lists*](#)

Pathagoras Manual: [DropDown *Lists*](#)

In general, a drop down list is any of those lists of things (fonts, styles, etc.) that currently sits at the top of your Word editing screen. They give you instant 'point & click' access to a wide variety of Word settings.

So how great would it be if a drop down list allows you similar instant access to your documents?

A Pathagoras **DropDown List** does exactly that! Pathagoras **DropDown Lists** contain pointers to documents in a designated ('target') folder to which you want immediate access. You point, you click, and the clause or document you selected is automatically inserted into your work screen. You never have to navigate again to click in an item in a DropDown List. Powerful stuff here! And its not just a single folder that you can target. You can maintain up to 10 Pathagoras DropDown Lists simultaneously*

Creating a DropDown List takes 10 seconds tops. Once created, each List remains always active, always visible and always ready. When you exit Word and then return, so do the DropDown Lists.

There are several ways that you can create a DropDown List, but we'll start with the one that most users need to know immediately:

1. Click the Pathagoras tab. Look for the button that says 'DropDown Lists'. (It's the (5th one from the left. It will only say 'DropDown Lists' if you have not previously created one. Once you create your first one, a whole new section appears. In such case, look for the button that reads "Create New DropDown List.")
2. Click the button and follow the prompts. Keep the default selections that will pop up. They tell Pathagoras that you intend to navigate to a particular folder of documents (next step).
3. *Navigate to inside the folder into which you stored the document(s) you 'Pathagorized' yesterday.* Select a document in that folder. **NOTE:** As the instructions will tell you, *it doesn't matter which document you select*; you are locking in a folder not a document.
4. Click the OK button, and you are done. You have just created your first DropDown List!

Look for it in the toolbar area and click it to drop it down. You should recognize what you see there. It is identical to what you saw when you selected the folder in the previous paragraph. Starting now you will never have to navigate to that folder again. (Even after you exit Word and restart it, the DropDown List will be there.)

Click on an item in the List and watch what happens. Pretty cool, no?

Note the "New Doc/Insert" toggle button in the DropDown List controls area. (It will read "New Doc" in its default setting.) You can toggle this button. Here are the toggle alternatives:

- '*Insert*' will place your selection into the current document at the cursor location.
- '*New Doc*' will direct Pathagoras to process the selected item as a '*New Document*'. (Note that with "New Doc," Pathagoras inserts an exact duplicate of the desired document or clause onto a new page. You can tell it is not the *original* because the document's name is something like 'Document1.' That

way you cannot accidentally overwrite the original text.)

* Pathogoras DropDown Lists can also show Word Perfect® documents, image files, PDF files, Excel files and other content.)

Now, scroll all the way to the bottom of the list. Take a look at some of the 'tools' that are available. We'll point out three:

- **<<Refresh>>**: Use the **<<Refresh>>** option in those situations where you have manually added more documents into (or deleted documents from) the folder to which the DropDown List points. This simply brings the list up to date.
- **<<Open Folder>>**: As you now know, when you click on an item in a Pathagoras DropDown List, you are given an exact *copy* of the selected document, not the original. If you need to edit the original document, click **<<Open Folder>>**. Pathagoras will open a standard Windows file Open' screen There you can select the original document, quickly and without any navigation. Two clicks, remember.
- **<<Other Settings and Actions>>**: There is a lot more that a Pathagoras DropDown Lists can 'do' but we'll leave that to another day and another lesson. But if you want a peek, click **<<Other Settings and Actions>>** and view the choices.

Add one or two more DropDown Lists to your collection. Remember, you can have up to ten*. The more you add, the more you will get a sense of how powerful this feature can be (and how much time it will shave off your day from never having to navigate again to your forms folders). Also keep in mind that a DropDown List works whether the document you call in has been 'Pathagorized' or not. Any document can be called up through a DropDown List.



DropDown Lists are intended primarily to call upon documents one at a time. These documents can span the gamut, from simple signature blocks to huge overbuilt templates. We'll be discussing how to get more clauses into a DropDown List display on Day Six's lesson.

That's it for today.

*Actually, you can have 40 -- 4 groups of 10 DDLs. But that will have to wait for another lesson.

Day Three: Instant Database, revisited

Today's Goal: More practice with DropDown Lists and the Instant Database.

You used the Instant Database system on Day 1 when you tested your first '*Pathagorized*' document. We are now going to revisit that system and show you its *database* aspect. A couple of introductory items words first.

- Instant Database lets you search for and replace up to 999 distinct document variables. The default assignment is 60. Most users never use more than 30. Thirty is also the number of variables that display per screen. (To get to variables 31, etc., click the page number button at the top.)
- You can save the associations of [bracketed variables] with the personal data into an infinitely reusable 'Data Record.' You can quickly recall that Data Record from the 'Existing Records' list.

With the above in mind, let's assemble another document. Let's use a document you Pathagorized in day 1, and the book that you created yesterday. The below steps should now be familiar:

1. Click on one of the DropDown Lists you have created yesterday and select one of the documents that you previously 'Pathagorized.' Pathagoras will locate the document and bring a copy of it to your editing screen.

Note that the document on screen looks identical to the source text, but it is not the source text. How can you tell? Check out its name. It will be called Document 2 or Document 5, etc.

2. Press the <Alt-D> key combination from your keyboard to display the Instant Database screen.
3. Here we have a choice:
 - If you previously saved a data record for this client or customer, click on the Existing Records list in the upper right side of the screen and select the record you saved. Pathagoras quickly places the saved data onto the Instant Database screen. (This is the 'database' part of 'Instant Database.') Pathagoras will also re-scan the document and pick up any additional variables that may not have been in the saved record. (That means that Pathagoras will continue to build on the data that it saves so eventually you will have all possible variables for the client saved in the database.)
 - If you have not previously saved a data record for this client or customer, or want to create a new record, press the button labeled Scan. Pathagoras quickly scans your document for [bracketed variables] and presents them in the left side of the form. Provide an appropriate value for each variable. Then, click the **Next>>** button in the lower right corner. Pathagoras will ask if you want to save the Data Record. Say "Yes" this time and give this record a name (typically the name of your client or customer, last name first). When you press the final OK button, all of the variables will be replaced with the personal data you assigned, and the data will be saved to the 'saved records' folder.
 - Let's become more expert with this stuff. Repeat the above steps. You can select the same document (but pretend it is a different one for this lesson), or, if you have Pathagorized other documents, select one of the others.

➔ Imagine for a moment that you have lots of documents (pleadings, forms, cover letters, contracts, etc.), each of which contains identically named [bracketed variables]. As we hope you can see, you will now be able to quickly and elegantly replace the variables in any and all such documents. You never have to type the client's name, address, etc., more than once. Further, any variables in a new document will be automatically

added to the list of existing variables. So the database continues to grow as you work on new documents. *That* is what the Instant Database is all about. ←



A few bits of additional information we want you to know:

- The green asterisks that you may see between the columns indicate that particular variable exists in this document.
- If the data you recalled needs to be changed, by all means do so. Pathagoras will detect the change and when you click [Next>>](#), Pathagoras will ask if you want to update the record.
- If the word "Date" appears in any form in a variable (e.g., "[Date of Letter]" or "[Contract Date]"), Pathagoras will insert a small, square green box between the columns. If you click on the box Pathagoras will display a calendar from which you can select a date (past, today or future) and if desired, even perform 'date math' on a selected date.
- If your variable is "[Today]", Pathagoras will automatically insert today's date in the adjacent field.
- It is not necessary to save a record via the 'Save' button before clicking the Next button. Next will always prompt a save.
- Double clicking inside the value (right) side of the Instant Database screen will cycle through various displays of certain items. For example, if the variable is [Date of Contract] and you typed 2/15/16 and then double clicked on that value, Pathagoras will cycle 'February 15,2016' --> 15th day of February, 2016 --> 2/15/2016, etc. You can also convert 111223333 to 111-22-3333 if the variable reads "Social Security Number" or SSN.

[Click here](#) to learn a whole lot more about Instant Database.

Extra Credit: If you want any two multiple choice variables to move 'in tandem' with each other (such as "[he/she/they]" and "[him/her/them]"), connect them by use of a !GroupName! No time to discuss that here, but click this link to [learn more about !Groups! and Variables](#).

Day Four: The 'Create Variables' Assistant & Optional Text

Today's Goal: Learn Faster Way to Create Document Variables.
(Replace "John Doe" with [Client Name] throughout document in one step.)

Note: The steps described below are also illustrated in these references:

Video Tutorial: [Create Variables Assistant](#)

Pathagoras Manual: [Create Variables Assistant](#)

Let's 'Pathagorize' a few more documents. This time, we will speed up the variable creation process quite a bit by using the 'Create Variables' Assistant.

1. Recall another document that you want to 'Pathagorize.' This time, call up a document that has lots of personal data within it. Lots of "John Does" and "Mary Smiths," etc. (It should be an existing document that you prepared for a client that you think is a pretty good product, and that you want to reuse for others. A classic 'document template', in other words.)
2. Highlight (using your mouse) a block of text that you want to convert to a variable (a name, an address, a date or any other 'personal' value that currently exists in the document).
3. Press <Alt-V> to activate the 'Create Variables Assistant'. (Here , 'V' stands for 'V'ariable.)
4. Click the 'Convert to Variable' button on the upper-left side of the Create Variables Assistant screen. Pathagoras will ask you to provide the name for the new variable.
5. Type in the text box any variable sounding name. E.g., 'Client Name' or 'Customer Address' or 'Date of Contract'. No brackets are needed. Pathagoras will add them automatically.
6. Click **Next>>**. Pathagoras will replace the original 'personal' text with the new variable throughout the document. (Note that the case (upper, lower, mixed) of the formerly 'personal' text is preserved upon its conversion to a variable.)
7. Repeat to create other variables. Save your work in an appropriate place. Recall your document and test. Pretty easy, no?

Now let's talk about **!groups!**. Surely you have situations where you want elements of disparate multiple choice variables to change in tandem. For example, you want a pronoun to match an actor so that when you select 'Testator' as the maker of the will, the pronoun 'he' and 'his' and 'him' appear in the appropriate locations.

!Groups! is the simple solution. "[Testator/Testatrix]", "[he/she]" and [his/her] are totally independent multiple choice variables. But add a !groupname! to each variable and they will work together. For example:

"The [!t!Testator/Testatrix] declared this Will to be [!t!his/her] Last Will and Testament and that [!t!he/she] signed it in front of the above witnesses."

The **!group!** in the above example is simply the three characters **!t!** but it could have been !testator! or !client!. A !groupname! is simply any word or any length (one character to 30) that is surrounded by exclamation marks and placed just inside of the opening boundary marker.

Try it. Modify any of your existing documents (or create a new one. with the Instant Database. Keep in mind that there is no limit to the number of choices that the multiple choice variables can contain, or the nature of the choice. Pronouns such as the above just scratches the surface of possibilities. Think Attorneys, their

assistants, their bar numbers; Judges, their clerks, their addresses, etc.; States and their Capitals. The only requirement is that desired choices occupy the same relative positions within the variable choice lists.

Save any new documents into the folder where you saved other Pathagorized documents. Alternatively, if you are working on a new kind of documents in a different practice areas, save the documents into new and appropriately named folders and target these folders with new DropDown Lists. Test your work by recalling various documents from the various Lists you by now have.

Day Five: Options and Optional Text

Today's Goal: Create Simple 'Options' and 'Optional Text' blocks.
(Creating, presenting and selecting Optional text has never been easier!)

Note: The steps described below are also illustrated in these references:

Pathagoras Manual: [Simple Options Blocks](#)

'Optional text' is text within a source document that sometimes you want to keep, sometimes you don't. When properly marked in your source text, Pathagoras will identify that text during your next document assembly session and automatically ask "Do you want to keep this?"

These easy to create sections allow you to power through your document, quickly making decisions as to what text should comprise the final draft. They allow you to add significant variety and flexibility to your source text.

Today we'll create some simple {Optional} and {Options} text blocks. Here are the steps:

- (1) Recall to your editing screen the document that you want to 'Pathagorize'.
- (2) Go to (or create) a piece of text that, you consider optional. Surround that text with plain text curly braces around that text. (Curly braces are found just above the square brackets on most keyboards.)
- (3) That's all there is to it! Save the document into one of the folders which a DropDown List targets.
- (4) Assemble that document by clicking on it from the DropDown List . As the document is being assembled, Pathagoras will highlight such the optional text blocks and ask "Do you want to keep this?" Just answer "Yes" or "No."

i Here is an important 'side lesson.' If you manually recalled the original document using Word/Windows navigation, instead of 'assembling' it as called for in 4, the document will just 'sit' there. Pathagoras thinks when you recall the original to the screen that your intention is to *edit* it, not **process** it. On the other hand, if you 'assemble' the document using Document Assembly tools, Pathagoras will automatically **process** it, searching for the options/optional text blocks that reside in the form.

(4) There's even more! Let's say instead of the text being totally optional, you want it to present 'options' (multiple choices) from which the end user can choose. The beginning steps are the same as above (use the curly braces to indicate the boundaries of the entire block). Insert "/OR" (no quotes) in between each choice. E.g., {Red/ORBlue/ORGreen} (The "/OR" must be in all CAPS.) The choices can be individual words as shown here, or complete phrases, sentences and even paragraphs. When Pathagoras encounters the options block, it will present each choice in a selection screen.

The above discusses Pathagoras' simple options/optional text blocks. Pathagoras offers a more robust version of Options/Optional text whereby you can add questions or prompts to more accurately guide the end user during the document assembly process. Read more about ['robust' Options/Optional text blocks](#) at this link.

!Groups!: Just as you can add a !groupname! to a variable to tie two or more related variables together (see Day 3), you can add a !groupname! to an Options/Optional text block. Read more about [!Groups and Options/Optional text](#) here.

Day Six: Creating New Clauses & Document 'Dis'-assembly

OBJECTIVE: Creating Clause Snippets and Building Blocks
Document Dis-assembly.

Note: The steps described below are also illustrated in these references:

Video Tutorial: [TermWorks! and adding text to a book.](#)

Pathagoras Manual: [Document Disassembly](#) (general) and via [DropDown Lists](#)

Any good document assembly program must provide a simple and direct way to create new boilerplate and building block text. Pathagoras does. Here's how.

Display to your editing screen a document from which you wish to pull out building blocks and other text snippets*. (Don't worry about 'Pathagorizing' the text. You can also do that later.)

Document Disassembly via DropDown Lists:

1. Highlight a piece of text you want to save as a separate clause. To preserve formatting information, make sure that you include the Enter character of the final paragraph of the section you wish to save.
2. Drop down one of your DropDown Lists. Click the entry that reads "Save Text to Folder".
3. When the TermWorks! screen appears, give the text block a name. (The 'subject' field is optional.) As will become apparent why later, we recommend that you use short easy to remember names, and that you not use hyphens.
4. Click the green 'Click Here to Add' button. You are done! Check the DropDown List and you will see the new clause is there.

Want to confirm that the clauses are really being added. Via the Windows navigator, open the DropDown Lists' target folder in a 'conventional' fashion. Yep. There they are!



Now for a powerful DropDown List feature. (This explains the naming style we proposed above.)

1. Type the name of a document you know exists in a DropDown List (just the base name, not the 'doc' or 'docx' extension).
2. Press Alt-G.

Hey, is that cool, or what? (If nothing happened, check your spelling. Alt-G should insert the document you typed at the insertion point.)

Document Disassembly via Term Works:

1. Highlight the first piece of text you want to save.
2. Press <Alt-G>. That calls up the TermWorks screen. (Same as in the DropDown List method, but the assumption is you want to navigate to a folder because you do not have a DropDown List that points to the target.)
3. In the middle section of the TermWorks! screen, provide the name you want to give to the clause you are about to save. (The 'Subject' field is optional). Now you have some choices.
 - You can save the highlighted text as a clause into the Position #1 Book of the current Library. (the name of which is shown in the lower left quadrant of the screen). This requires no additional

navigation on your part.

- Or you can save your text into any other existing book. Click the middle button and check the target book. Click the <Add Term> button. Pathagoras saves the term where you have directed.
 - Or you can save the text to any other location on your computer. Use the SaveAs button and navigate to the location of your choice. Once you have navigated the first time, Pathagoras remembers this location during this disassembly session.
4. Once the document is saved, Pathagoras returns to the base document, and highlights the next block of text meeting the "Break Point" parameters that appear in the upper right section of the TermWorks screen. You can change the scope of the selection by using the arrows in the upper left quadrant of the screen or by exiting the TermWorks screen and manually highlight the desired text. Repeat the steps to keep saving.

*By building blocks and snippets, we include signature blocks, certifications, case styles, boilerplate text (from single sentences to multiple paragraphs) that you likely will use in a variety of settings. The source of the text can, of course, be an existing document, but it can also be text that you type freehand, or text that you get from manuals received at professional education courses or simply text that you copied and pasted from Internet sources.

Day Seven: Adding a 'Library and some 'Books'

Today's Goal: Learn how Pathagoras makes it easy to find and recall your documents. The Libraries and Books screen. Also known as "no navigation required anymore."

Note: The steps described below are also illustrated in these references:

Video Tutorials: [Creating a Library](#) and [Shelving Your First Book](#)

Pathagoras Manual: [Creating a Library](#). and [Shelving Your First Book](#).

In previous lessons, we started from an assumption that you were recalling a single template or building block from a DropDown List. But 'true' document assembly suggests the cobbling together of multiple building blocks, and another tool that Pathagoras provides may be more appropriate. Assembling multiple building blocks of text can be done in a more efficient manner via the Document Assembly tool.. Pathagoras provides an exceptionally easy and logical way to do so.

Pathagoras uses a 'Libraries>>Books>>Clauses' metaphor for this aspect of its document assembly module.

- A Pathagoras 'book' is a pointer. It points to a standard Word folder that resides on your computer or across your network. (It can also point to your 'cloud' storage locations.)

Bottom line--a "book" equals a "folder" (and nothing more). When we 'create' a book in the steps below, all we are doing in creating a pointer to a folder of your choosing. We are not moving any files around, or compressing them into something they were not before. The folder that you 'shelve' as a book is always the same folder it always was, and the documents the same documents they were before you even heard of Pathagoras. (The astute observer will note that a DropDown List and a Book are fraternal twins of each other.)

By recording the pointer, Pathagoras allows you to quickly access the contents of that folder without ever having to manually navigate to the folder again. That should sound pretty exciting.

- Think of a 'library' as an umbrella 'topic'. A library would typically refer to a broad subject or practice area. "Estate Planning" might be such a topic in a lawyer's office. "Contracts" and "Domestic Relations" are other broad topics. Under such a topic you would want to point Pathagoras to existing (or to-be-created) Word folders that contain forms and documents that relate to that topic.
 - So if 'Estate Planning' were your 'library' (umbrella topic), your 'books' might be (1) an existing folder that contain your Will documents, (2) other existing folder of that contains Trust clauses, and (3) an existing folder that contains Guardianship petitions and orders.
 - Under a 'Domestic Relations' topic (library), you may have (1) a folder (book) that contains 'Adoption' forms and (2) another folder (book) that contains "Separation Agreements" and (3) another folder (book)that contains 'Divorce petitions', etc.

A little prep for this exercise. If the folder in which you stored your Pathagorized documents yesterday has only one or two documents in it, copy three or four (or a dozen) additional other documents into that folder. (Keep in mind that Pathagoras uses your folders. It does not create new ones. So, to move documents as requested in the first sentence, just use regular Windows commands.) When done, move to the next topic below.

Create your first Library.

1. Click the Document Assembly icon in the Pathagoras toolbar. (It's the third one from the left.)
2. Drop down the list at the top of the screen titled 'Libraries' and select the 'Add New Library' element.

3. A new screen appears asking you to name the Library. Here is where you would put in the topic like 'Estate Planning' or 'Contracts', etc.. (You can name the library anything you wish. Your company name would also work.) Click OK when done.
4. You are next asked how much of the 'old' library you want to keep. We don't really want any of the old library. So, click the second button from the top which reads "Start from a Blank Sheet." Click OK and you are done. A 'Congratulations' screen appears advising you of your success. You are then returned to your Word session.

i Note: A library is simply a name. It is *not* itself a folder into which you must move other files or under which you must add sub-folders. A library is just a simple text file that Pathagoras creates that will contain 'pointers' to books (folder names) that you will assign next.

Add your first book. (If you are still new to Pathagoras, please read all of the prompts in the screens that will appear. They do a good job of guiding you through the steps.)

5. Click the Document Assembly icon in the Pathagoras toolbar. Notice that the Library you just created now appears in the window at the top of the overlay form.
6. Click on a blank 'bookshelf'. (Of course, all are empty at this point.)
7. When the screen expands, read the instructions and then click on the QuickSet button at the right.
8. Select the first item ("All documents in a selected folder") as the target for your book. Click **Next>>** and follow the subsequent prompts. You are asked to navigate to inside the folder which contains the target files. For now, just navigate to inside the folder in which you stored the document(s) you created earlier.
9. Select one of the document in the folder (*it does not matter which one*) and click OK.
10. When prompted, provide a 'nickname' for the 'book'. (Generally you will accept the name that Pathagoras proposes. It is the name of the folder that houses the documents you see). This 'nickname' is what will appear as the 'book name' in subsequent Document Assembly displays.
11. Click OK. You are done! You have shelved your first book. The book points to the target folder. When you hover your mouse over the name of the book, Pathagoras shows the folder's name in the 'tip text'.
12. Repeat steps 5 thru 11 if you want to 'shelve' more books. It should go quite quickly from now on. Just remember -- nothing in your computer is moved or changed when you create a library or shelve a book. The documents in the target folders all stay put. Pathagoras changes nothing in your folder structure. Everything is just as it was before, except that Pathagoras has recorded a pointer to your 'book'. It is this pointer that lets Pathagoras quickly and directly get to your files. You never have to navigate to them again.

Let's use your book to assemble a new document: Click the Document Assembly button again. Select the book you just shelved (or any other book you may have shelved). Click **Next>>**. The Clause Selection Screen appears. (The items in the left panel should look familiar.) If you later add more documents to the folder, they will automatically appear in the listing the next time you display it.

i So, what has this book accomplished for you? Several things. From now on, it will never take you more than 3 clicks to get to it. You will be able to more quickly display its contents than if you had to manually navigate to it. If you want to select more than one item from the book for 'assembly' (and you will as you get more 'into' Pathagoras), you can easily do so. (Of course, if you only wanted a single item from the book, consider using the DropDown List which targets this folder.)

Play with the book. Selects some items, moving your selections from left to right with the Add button, and assemble a document (or two, or five). Note that when you assemble documents via this screen, you are

always working with copies, never the original. You can rest assured that you will not accidentally overwrite your original documents.

Day Eight, and beyond

By now, certain aspects of Pathagoras should be an integral part of your daily routine. Continue to add variables to documents. Spend a bit of time moving some of your existing documents into more organized (topical) folders. Add these folders to your library as 'books'.

Create more Drop Down Lists

At your own pace, read more of the [Pathagoras Users' Guide](#) found on the web site. Read especially the sections about adding new libraries and book. You will not have a 'real' system until you are effectively using Libraries & Books.

Whatever features you try, whatever steps you take, whatever lessons you study, you will be ahead of the game. Moreover, if you decide never to use another feature of Pathagoras beyond the last one you learned, you will have still gained a lot.

One Page Quick Start Guide

Insert variables into document for automated replacement.

Open the document that you wish to 'Pathogorize.' We will call this document the 'source' (original) document. Put [square brackets] around each word or short phrase that you want to serve as a 'variable.' (A variable is a 'holding place' for what later will be personal text. E.g.: [Client Name].)

Create multiple-choice variables in a similar fashion. Listing all choices within the square brackets (as above), but separate each choice with a forward (/) slash. (See examples below.)

Enclose text that you want to be "optional" within { curly braces }. (See examples below.)

Close and save the document into an appropriate forms folder.

Hints & Tips:

The variable should have a 'variable sounding,' reasonably descriptive name. "[Date of Letter]" is more meaningful than just "[date]". Use "[Name of Customer]" instead of plain "[Name]".

Don't save source document with .dot (template) extensions. Use standard .doc extensions. 'Plain' documents are much easier to work with.

Example:

This is an example of a 'Pathogorized' letter:

Dear [Customer Name].

Thank you for your order placed on [Date of Order] for [quantity] [red/blue/assorted] [product name].

We will ship your order within 5 business days.

{Please note. Due to the special pricing of these items, all sales are final.}

[Sales Representative Name]

Assign data to variables

Open or create the document that contains variables. Press Alt-D (for 'Database') to display the Instant Database screen. (It is called Instant Database because you will be able to instantly save the variable-to-data pairings to a database for reuse with other documents.)

Type the appropriate value into the textboxes for each variable. If you have created multiple-choice variables, select from drop-down lists. Press the Tab key to move to the next variable.

You may have several pages worth of variables. Press the numbered buttons at the top of the screen to move from pages to page. Press the '>' button to display addition pages beyond 4.

Press the 'Next' button when finished. You need not complete all variables. You can run Instant Database at a later time to fill in the remaining variables.

Libraries & Books

You should never use the original source text for creating a personal document. You should only use a copy of the source text.

Pathogoras makes it easy to implement this rule. Pathogoras' 'Libraries & Books' and 'DropDown List' modules allow you this protection in a simple, but very elegant style. Read more about setting up Libraries & Books at Day 3 of this Guide.

Creating a New Document:

1. Click the Document Assembly button.
2. Click the radio button on the line of the book from which clauses are to be drawn.
3. Click 'Next'.
4. Choose the clauses/documents you wish to assemble from the left column and move them to the right.
5. Click 'Next'.
6. Press Alt-D to bring up the Instant Database screen.
7. Press the Scan button to read the variables.
8. Type a value to replace the variable.
9. Click 'Next'.
10. You are done!



Pathogoras contains many features, options, buttons and alternative ways to accomplish any goal you set. (This is similar to Microsoft® Word, the program Pathogoras augments.) Do not be overwhelmed by this. The above steps will get you into the meat of the program. The rest of this Manual will show you more of the program's features. Once you feel comfortable with the basics, then explore the remaining program features.

Technical Support

Pathogoras prides itself on 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 Pathogoras' customer service as a 'first line' level of help as well.

While we cannot promise that you will never receive a voice-messaging service when you call, more likely you will receive a live person at the other end. But if you do get our voice mail, just leave a message or send us an email. We will get back with you 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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Reporting a 'bug':

We ask you to report any and all program 'bugs' you encounter (whether you 'know' it is a bug, or just think it might be). If you encounter a problem while Pathagoras is in operation, and can duplicate it, [please send us a list of the steps](#) that you took to generate the error. (The error message of 'failure code' is rarely enough to pinpoint the source of the problem, so the more information you can provide to us, the better.) We would also greatly appreciate your sending any screen shots that may help us to better identify the issue. Sending us actual text of documents that didn't quite work would be good too. (We will not share your documents with anyone. We understand the proprietary nature of your personal or business work.)

Sample 'Pathagorized' Text

The below text is a collection of the examples provided in previous sections of this Manual, plus additional sample text. If you are looking at this page electronically, you can block copy this entire page into a Word document. You can then get a flavor of how the program works, but without having to type a single character of text.

Note that all text is 'plain text'. You can augment any example just by typing more plain text. Any changes you make will be reflected in your next 'run-through.' (To view an electronic version of many more samples, go to www.pathagoras.com/sample.)

Sample Variables:

[Client Name], [product], [he/she/it/them]

Sample Optional text:

{ Please call me as soon so that we can discuss the various options that I have outlined in this letter. }

Sample Options (multiple choice) text:

{ Please call me as soon so that we can discuss the various options that I have outlined in this letter./ORPlease email me with any questions you may have at the following address: info@pathagoras.com./ORPlease send us a fax with your order and questions. }

[Title] [FirstName] [Lastname]
[Company]
[Address]
[City], [State], [ZIP]

Dear [Title] [Lastname]

In response to your Request for Proposal, we hereby offer to supply [number] [product] at \$[price] per [product].

Kindly let us know when we might expect to hear from you next.

Sincerely,
John Q. Queue

AGREEMENT

This Agreement, by and between [PRIME CONTRACTOR], [Prime Contractor Address], [Prime Contractor City, ST ZIP], and [SUB CONTRACTOR], [Sub Contractor Address], [Sub Contractor City, ST ZIP]

AGREEMENT AND TERMS

Contractor agrees to furnish and deliver all items or perform all the service set forth or otherwise identified above and on any continuation sheets for the consideration stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) this award/contract. (b) the original solicitation, if any (c) such provisions, representations, certification and specifications as are attached or incorporated by reference herein

Total Amount of Contract: [Amount of Award].

'Pathagorized' documents

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