



# 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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Printed: March 2012 in Yorktown, Virginia

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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 with no fields and no hidden codes.

You do not have to consult with your doctor before beginning the exercises.

(Alternatively, you can compress all of the lessons into just a morning or afternoon session. Figure 2 hours.)

Whether your objective is to prepare complex contracts or speed-up the daily production of letters and other business 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?

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 600 pages in length.

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

**Word2007/2010 users:** the toolbars and lists referenced in the following lessons all appear behind the 'Pathagoras' tab on the Word ribbon.

## Day One: 'Pathagorizing' your first document

Today's Goal: Simple document automation.

Plain text square brackets surrounding 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 demonstrates 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 appears.
- e) Click the button labeled <Scan> in the lower left corner of the screen. Very quickly Pathagoras will 'scan' the document and locate every bracketed term on the page. It displays what it found on the left side of the page. Note also that the multiple choice variable [Mr./Mrs./Ms./Dr.] has been transformed into a selectable drop down list.
- f) On the right side of the form, type values 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.

### (2) Now for the real thing:

- a) Pull up an actual document or letter currently in your computer 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.) Or, you can start 'fresh' from a blank screen. Your choice.

- 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. Just like you did in 'play time.' Then replace the current value with something descriptive and generic.

So, "John Q Doe" might become '[Client Full Name].' '123 Main Street' might become [Street Address]. If the opportunity presents, create a multiple choice variable. Simple slashes separate each choice.

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

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

- c) Save the document to a folder where you keep forms. If you don't have such a folder, create one now.  
d) 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. ←**

- e) Press <Alt-D> to display the Instant Database screen. Click the <Scan> button in the lower left corner of the screen. Pathagoras identifies each bracketed variable and quickly presents them on the Instant Database screen.  
f) Fill in the blanks in the right side of the screen with an 'appropriate' value.  
g) 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.  
h) 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.  
i) Study it and smile. Close, *but do not save*, this document.  
j) 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.)

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

## Day Two: Adding a 'book' to a 'library'

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](#).

Now that you have created a form (the one you 'Pathagorized' yesterday) and have safely tucked it away in a folder, you will want to be able to access that form (and all the forms you are likely to store along side of it) in the most efficient manner. Pathagoras provides an exceptionally easy and logical way to do so.

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

- A Pathagoras 'book' is a pointer. It points to standard Word folder that resides on your computer or across your network. (It can also point to your 'cloud' storage locations.) In this exercise, we are going to point to the folder where you stored 'yesterday's' documents.

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.

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 a general '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' (general 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 document 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.
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.

**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 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 this exercise, navigate to inside the folder in which you stored the document(s) you created yesterday.
9. Select one of the documents 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 for you 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.

So, what good is this book? 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).

Play with the book. Select 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. *This is how all future access to your forms should be done.*

Enough for today. Revel in your success.

## Day Three: Instant Database, revisited

Today's Goal: More practice with the Document Assembly 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 houses in that you created yesterday. The below steps should now be familiar:

1. Click Document Assembly and click on the book that you created yesterday. Click **Next>>** to display all of the clauses in that book into the Clause Selection screen.
2. Select the document (or one of the documents) that you previously 'Pathagorized,' moving selected items from 'left to right' by clicking the 'Add' button. (You can also move a desired item to the right by double clicking it.)
3. Click **Next>>** to 'assemble' the document.

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.

4. Press the <Alt-D> key combination from your keyboard to display the Instant Database screen.
5. 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 steps 1 through 5, but of course the first bullet of 5 will be applicable.

➔ 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 such document. 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:

- 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 (doing so is optional) 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.

[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](#)

You cannot truly appreciate 'document assembly' unless you have several documents from which to choose and/or assemble. So let's prepare a few more. This time, we will use the 'Create Variables' Assistant to help us to insert [bracketed variables] into your documents.

1. Recall another document that you want to 'Pathagorize.' This time, if possible call a document that has lots of personal data within it. Lots of "John Does" and "Mary Smiths."
2. Highlight (using your mouse) text such as a name, an address, a date or any other 'personal' value that you want to convert to a variable.
3. Press <Alt-V> to activate the 'Create Variables Assistant'. (Here , 'v' stands for 'variable'.)
4. Click the 'Convert to Variable' button on the right 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. No brackets are needed. Pathagoras will add them automatically.
6. Click **Next>>**. Pathagoras will replace the original text with the new variable throughout the document.
7. Repeat to create other variables.

This is a short lesson, so keep on Pathagorizing documents

Save any new documents into the book you created in Day Three or if you are working on documents in a variety of practice areas, into new and appropriately named folders. If you do create new folders, be sure to add those folders as books to your current (or a new) library. Test your work by recalling various documents from the various books you by now may have using the now familiar Document Assembly tools.

We hope you are beginning to get the picture of how powerful, yet simple, plain-text based document assembly can be.

## 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.

Options and Optional text sections allow you to add significant variety and power to your source text.

Today let's 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. Then, assemble it using the Document Assembly tools you now know well. 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 simply recall the document you have been working on to the editing screen instead of 'assembling' it as called for in 3, 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 you don't want the entire text block to be optional. Rather you want it to present 'options' (multiple choices) from which the end user can choose. The steps are the same as above (use the curly braces to indicate the boundaries of the entire block) but 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: 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 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. For example, the 'Fonts' and 'Styles' boxes that sit atop your Word screen are drop down lists.

A Pathagoras **DropDown List** operates in a similar 'point & click' fashion. Pathagoras **DropDown Lists** typically contain complete documents and/or clauses to which you want immediate access. You point, you click, and the selected clause or document 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! You can maintain up to 10 Pathagoras DropDown Lists simultaneously.

(We say 'typically' in the above paragraph because a Pathagoras DropDown List can actually reflect any folder on your system and can contain just about anything -- Word documents, Word Perfect® documents, image files, PDF files.)

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 two ways that you can create a DropDown List.

- (1) From a Book: Display the Libraries & Books screen and select the book from which you wish to create a DropDown List. From the expanded screen, click the "Create DropDown List" option. Click [Next>>](#). Follow the prompts.
- (2) Freestyle: Click the Pathagoras dropdown features menu. (The 4th button in the Pathagoras toolbar.) Click the "DropDown Lists" entry. Read and follow the prompts to select the folder you want the DropDown List to represent.

Whether you used (1) or (2) above, the resulting DropDown List will appear in the menu area of your Word screen. Look for it. It will contain the identical items as the folder it represents. Only now, you will never have to navigate to that folder again. Click on an item in the List and watch what happens.

Add one or two more DropDown Lists to your collection. Remember, you can have up to ten. The more you add, the more you 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).

Note the "New Doc/Insert" toggle button. (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.)

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 to you here:

- **<<Refresh>>**: You will 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. If you want to edit the text so that your changes are 'permanent,' you need to work on the original. **<<Open Folder>>** lets you get to the original document quickly and without any navigation. Two clicks, remember.
- **<<Show More Tools>>**: 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 the **<<Show More Tools>>** item and scroll down to the end of the list again.



DropDown Lists are best used when you want to call upon a single document with your effort. Use DropDown Lists when you have prepared a 'big' template to which you have added Optional and Options text blocks (Day 5) and wish to 'peel away' the unneeded text. When you call a document via a DropDown List, these Optional and Options text blocks are immediately processed (i.e., Pathagoras automatically scrolls to and displays the options. Make your choice and Pathagoras then automatically moves to the next one.

Also use DropDown Lists when you need that 'one last clause' to complete the document. Of course, one of your DropDown Lists must contain those 'one last clauses.' But when you need it, it's nice that Pathagoras makes it so readily and easily accessible. We'll be discussing 'document dis-assembly' by which you can create lots of 'one last clauses' in tomorrow's lesson.)

If you want to assemble multiple items in a single action, use the Document Assembly tool discussed on Day Two.

Bye for now.

## Day Seven: 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.](#)

This exercise is optional. If you intend to use Pathagoras with 'whole documents' only (i.e., 'assembly from templates'), then you can take the day off or review the previous days' assignments.

But if you anticipate '*paragraph assembly*' (i.e., selecting individual clauses from a large collection), this is your day! We will show you one of the more than half-a-dozen tools Pathagoras provides to quickly and easily disassemble a document into its component parts (building blocks).

1. Display to your editing screen a document that you want to 'dis-assemble'.
2. Highlight the first piece of text you want to save as a 'building block.' To preserve formatting information, make sure that you include the Enter character of the final paragraph of the section you wish to save.
3. Press <Alt-G>. That calls up the TermWorks screen.
4. In the middle section of the TermWorks! screen, provide the name you want to give to the clause you are about to save and give it a subject. Now you are ready to save it. Pathagoras provides 3 possible locations.
  - You can save the highlighted text as a clause into the Position #1 book (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 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. Keep this in mind as you are disassembling other documents.

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.

Confirm (if you desire) that the clauses are really being added. Click Document Assembly button and select your book. Yep. There they are!

## 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 'Pathagorize.' 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 'Pathagorized' 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.

Pathagoras makes it easy to implement this rule. Pathagoras' '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!



Pathagoras contains many features, options, buttons and alternative ways to accomplish any goal you set. (This is similar to Microsoft® Word, the program Pathagoras 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

Pathagoras 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 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 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](http://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./OR  
Please email me with any questions you may have at the following address: info@pathagoras.com./OR  
Please 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 G. 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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