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USING PATHAGORAS *Aid to Document Assembly & Navigation*

By Stephen Bird, Contributing Editor

Pathagoras is described as a Microsoft Word add-in that is designed to improve on Word's native capacity for creating, retrieving and saving documents. According to the literature, "The 'PathSmart' and 'SaveSmart' modules replace traditional navigation techniques for locating and saving documents, then document assembly tools enable users to create documents from a virtual 'check sheet' of available clauses."

FIRST IMPRESSIONS

My first impressions were that this seemed complicated. How would I ever get this program to do what its developer—Roy Lasris, a Virginia lawyer—tells us it can do? Let's see if someone (me) who thinks he can figure out computer stuff can make sense of all this.

Here's a Microsoft Word add-in program designed to aid in legal document assembly via a "virtual 'check sheet' of available clauses."

First, though, a confession: I haven't written about document assembly since an article on ExperText in the March 15, 1994, issue of *The Lawyer's PC*. Certainly there are some very good/popular document assembly programs, including HotDocs (www.capsoft.com) and

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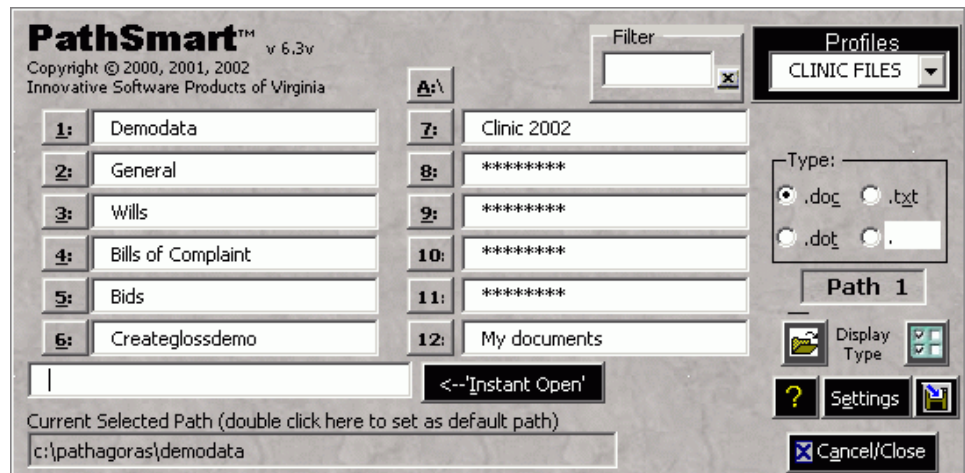
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Computer product information submitted to the newsletter should include a product description, vendor contact and pricing information.

GhostFill (www.ghostfill.com), that have gained favor with the legal profession. *The Lawyer's PC* annual law office software directory, coming mid-November, each year provides a list of such programs. My reason for not writing more on this topic is simply that I don't use these programs, given the nature of my law practice.

Yes, I probably could benefit from document assembly but—raise your hand if you've heard this excuse before—I don't have time to learn the intricacies of complex programs and/or I don't want to become dependent on a proprietary format that binds me to one company or product.

The first and easiest part of using Pathagoras is downloading the free 30-day trial version and installing the program. During the installation, users are given the opportunity to practice assigning PathSmart numbers to folders. At first, I found it difficult to think of folders (which typically have descriptive names) as numbers. However, the PathSmart feature reminded me of a nice little DOS utility that quickly took me to the directory I sought without typing the full pathname. LCD (Ledbetter's Change Directory) saved me much time then, and PathSmart can save time now, especially if client documents are saved into separate folders.

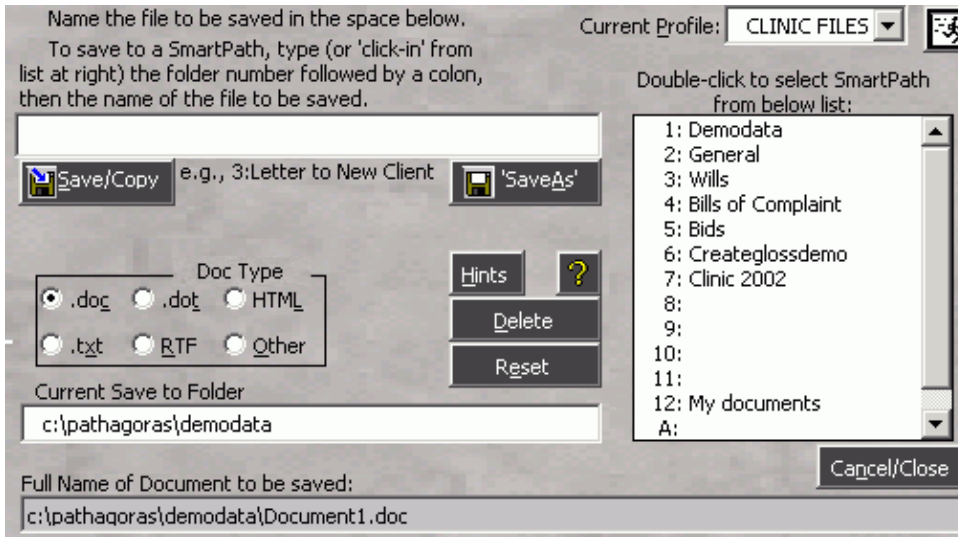


PATHSMART

In order to assign numbers to folders, users are told to press the PathSmart button (the runner icon), then select a number to which a particular directory associated. (I choose seven because the first six were taken by demo folders—these can be changed later.) Finally, click the “Set Path (#)” button. Users also can choose Option 1 (manually set the Smart Path) and follow the prompts.

While up to 12 paths can be mapped per “profile” or PathSmart screen, an unlimited number of profiles can be created, which means potentially every folder on every computer over an entire network could be mapped to a

profile and a number. Consider the following examples: “In actual use, a lawyer might create a profile for domestic relations (with individual paths assigned to complaint forms, answer forms, discovery forms, final decree forms, etc., with a final link to the client-personalized documents. Another profile could be dedicated to estate planning (wills, trusts, and client-personalized documents), and another for real estate, and so on. The profiles can be subject-oriented or user-oriented, or a combination of the two. Because the number of profiles is unlimited, so is the variety of ways that profiles can be set up.”



SAVE SMART

When saving an original or edited document, users click the SaveSmart icon, which presents the PathSmart numbers and nicknames along with a “name your file here” box. If the destination folder has been mapped in a different profile, then users select that profile from the list. At this point a set of possible “save-to” locations is displayed. Users name the document, double-click one of the 12 SmartPath boxes and then “save” the document in the proper folder.

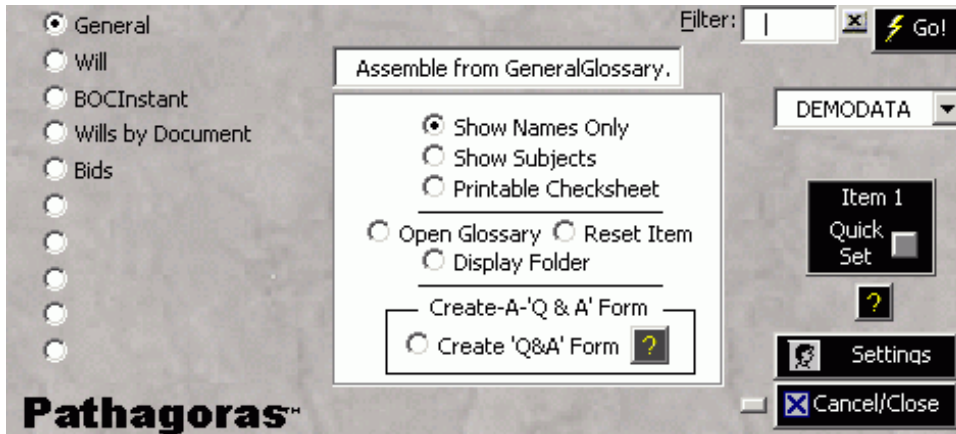
Other time-saving features in the PathSmart and SaveSmart modules include presorts, peel-back-searches, one-step “save and close,” additional <Alt><G> (no mouse) direct mapping, and direct display options. New users may want to read the Pathagoras Users’ Guide.

DOCUMENT ASSEMBLY

But what about document assembly? you ask.

In a fantasy world, a document assembly program would read a lawyer’s mind, choose the best words and then assemble the document in seconds. (Yes, that *would* be a fantasy world—especially the first part). However, reality says what later will come easier first needs preparation. In that light, I’d strongly recommend users take time to follow the demo document assembly module included in the program. (See screen sample, next page.)

Okay, you’re still not convinced. So, imagine that many of the documents on your computer are a collection of the individual boilerplate-type paragraphs which, if pulled together (assembled), would form a



complete document (a will, a pleading, a contract, etc.). Again, imagine that each of the individual clauses is a simple Word document located in standard Word directories/folders. Each clause can be edited, duplicated or deleted in a way basic to MS Word usage. Now, imagine that with a couple of mouse clicks, users can display an alphabetical list of the names of the various clauses on a virtual check sheet. Finally, imagine that creating a complete document takes a check box beside each selected clause; then, press the “Go” button and—*presto*—instant Document.

One of the things I really like about Pathagoras is that the words/clauses are mine. My recollection of ExperText is that the program provided the words which, while editable, were not *my words*. Certainly, I appreciate that a database of clauses from another source (such as a big law firm or a forms company like Michie) can be helpful to a new lawyer. However, it will likely add to the cost of the program. Given that Pathagoras offers a downloadable demo version and costs a very reasonable \$129 for the full product, this is an easy product to try and buy.

I imagine this scenario from Roy Lasris for a busy law office—which works best if users name boilerplate clauses in the “prefix/suffix naming convention.” This means naming clauses of a certain category with a common prefix, with a numeric suffix used to categorize and distinguish the individual clauses. (For example, “last *will* & testament” clauses might be named “wil100,” “wil120a,” “wil120b,” etc.) Now, imagine assembling a document by typing the desired clauses (suffixes only) down the left edge of the editing screen. Finally, terminate the list by typing the prefix and pressing the Pathagoras <Alt><G?> hot-key combination. No mouse is required for this operation.

Pathagoras will read the list, locate the paragraphs chosen and assemble the clauses in the order provided. A description of the clause can be saved in the subject field of the document and then displayed next to the clause name in the virtual checklist so a user is not guessing what “wil100” contains.

If one last clause is needed to complete a document, then type its name (at the insertion point) and press <Alt><G>. If the clause is one of the mapped text sources, then Pathagoras will find and insert it.

Lasris reminds us that we are talking about boilerplate-clause document assembly, so the simpler the name, the easier such systems will work. A paper check sheet of the short name and description is generally used—and Pathagoras can print one of these!

If users need to take the assembled text and personalize it for the specific client, then Pathagoras provides for on-the-fly links to standard off-the-shelf-database software such as Access, Excel, Quattro Pro, dBase, Act and even Word tables and text files that contain desired data. I'm told that if you can link to it directly or via ODBC, then you can link to it with Pathagoras. Apparently this is very useful when working with documents that have not been previously linked to a data source, or documents that have been disconnected from the data source. The connection is made through a simple menu (similar to the PathSmart menu), thus avoiding Word's MailMerge routine (which may be a good thing).

Pathagoras also provides a link to its Instant Database (ID) feature, which allows users to search and replace up to 30 variables that may exist in the boilerplate clause (perhaps for variable information for which there is no corresponding field in the database). If there is no database system in place, then ID uses search-and-replace concepts and noncoded language.

Finally, it's worth noting that all aspects of the program are plain Word documents. "Source clauses, glossaries, if used, and the final product are all created, edited and selected within the confines of Word," the documentation points out. "No secondary program is required."

FINAL THOUGHTS

Once a user sees how Pathagoras works through folders, standard clauses, and so on, then it becomes apparent that this is a very elegant program. I would strongly recommend that anyone considering a document assembly program read two short pages ("For Busy People," www.pathagoras.com/busypeople.html), download the free demo, install, and then start using Pathagoras based on the "Busy People" suggestions.

Although many of the programs I review are from large corporations such as Microsoft, Ontrack and Symantec, I particularly appreciate and enjoy working with smaller firms that produce good software such as ActiveWords, CrossEyes, HyperSnap and Vopt. With a small company you often can get an immediate response to emerging issues. For example, part of Pathagoras recently was rewritten to accommodate a client law firm that started client matters with a number rather than a letter (e.g., "123Smith").

While Roy Lasris could be well satisfied with the increased efficiency that Pathagoras brings to his own firm, he seems willing to extend this to others who are prepared to pay a modest price and spend a bit of time. If you practice law in Virginia, there is an added bonus in that many standard clauses may be included (on request) as part of the package. Finally, if enough WordPerfect users ask for Pathagoras, then it may be developed for that word processing program.

I view document assembly somewhat like touch-typing: If you feel you don't have time to learn, then you don't have time not to. In other words, a little time spent up front can pay dividends for years.

For more information, visit www.pathagoras.com. (Incidentally, Lasris offers his apologies to the program's namesake, Pythagoras, the Greek philosopher and mathematician.) ❖

"I particularly appreciate and enjoy working with smaller firms that produce good software. . . . With a small company you often can get an immediate response to emerging issues."

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