Quick Start Guide

Instant Database and *GotForms?*

Other guides in this series discuss how to create variables and place them into your documents. This guide discusses and illustrates Pathagoras' incredibly simple 'variable replacement' modules. These modules automatically identify variables in your newly created document and, upon command, will replace them with client/customer specific information. And it can save the variable-to-personal-data matchups in individual, recallable, files so that you never have to enter the same data twice. (That is the 'database' part.)

Introduction

No document assembly system is complete without an efficient means of replacing variables that remain in the (almost final) assembled document. (Variables are place holders that await replacement with personal data before the final document is signed, mailed or otherwise processed.)

Pathagoras replaces variables with personal data in two distinct ways. The primary method is the 'InstantDatabase' ('IDB') module. The secondary, but still very powerful variable replacement tool is the ***GotForms?*** module.

Instant Database and ***GotForms?*** are complementary features. They using the same program modules and are conceptually practically identical. The main difference between the two is that Instant

Database system operates on all variables at one time. ***GotForms?*** is more narrowly tailored and operates on a single variable at a time. Both will be discussed in this Manual under separate headings.

Instant Database: A Quick Peek

Pathagoras uses a simple, plain text, straightforward 'find & replace' scheme in order to replace document variables with personal information. Indeed, the entirety of the system is nothing more than a fancy adaptation of the Word's Find & Replace (Ctrl-H) feature. It's just that it works on up to 999 individual variables at one time. Further, unlike other document assembly programs, there are no menus to create, questions to compose, links to generate or hidden codes to program. It is truly a simple, easy to understand system that provides all the power you will need to generate almost every document of which you can conceive. Very little could be simpler than the design of Pathagoras' plain text Instant Database system.

Keep the following in mind as you explore Instant Database:

- All variables used in Pathagoras are 'plain text' in nature. There are no hidden fields to create (or to mess with). No SmartTags to program.
- Any text can be used as a variable. As a practical matter, words that appear naturally in a document (i.e., "Customer" or "Client" or "Number" or "Date") should not be used as variables.
- "[Customer]" is not the same as "Customer". The enclosing brackets make it a different 'word.' Your ability to use 'common name' variables is greatly expanded.
- The text style of the variable within the target document controls how the replacement of the variable will take place. So if the variable in the document is ALL CAPS, the variable will be replaced in ALL CAPS, even if the operator types the personal data in lower case letters. The same applies to bold and italics and underlines.)
- The same is true when the same variable appears in different sections of the document. If is it ALL CAPS. Bold and italicized ("***[NAME OF CLIENT]***") in one place in the document and Upper and Lower Case ("[NAME OF CLIENT]")in another, "***JOHN DOE*** "will appear in the first instance and "John Doe" will appear in the second.
- The method adopted by Pathagoras allows for quite dynamic identification and display of variables. With HotDocs®, Ghostfill® and the other major program, variables are fixed. The form used to present the variables for matching up with personal data is likewise fixed. Nothing is fixed with Pathagoras. If a new form has a variable that an old form did not, Pathagoras will identify it and provide an easy way to replace it with personal data. And if you want to add the new variable to the Instant Database 'mask,' it can be done in a matter of seconds, without any programming.
- Instant Database is activated from the keyboard by pressing <Alt-D>.

Scanning:

Much of Pathagoras' power and extraordinary flexibility comes from its ability to quickly scan a document for words that exist between brackets or any other 'enclosing' characters. (These bracketed words are presumed to be the document's variables). Pathagoras displays the variables it finds onto the IDB screen where you then pair them up with replacement data. You can hand-type

the personal data to replace the variables or you can recall a data record previously saved for a specific client or customer.

Pathagoras' default enclosing characters are '[' and ']'. You can easily change the default characters to those of your liking. They can be a single character or multiple characters (e.g., "[&" and "&]")

Exception: The enclosing characters "<<" and ">>" are reserved by Pathagoras for other purposes. They cannot be successfully used as enclosing characters for the Instant Database system.

(Occasionally, Pathagoras will identify a bracketed term that is not in fact a variable. Example: author and secretary initials are frequently presented at the foot of a letter in brackets. When that happens, you can simply ignore it. It will remain in your document perfectly intact.)

Personalizing the document.

Ad hoc

You can direct Pathagoras to search for variables in a document on an *ad hoc* (i.e., on-the-fly) basis. The presumption here is that a newly assembled document or form (or document from any other source) is displayed on the editing screen, and that the document contains at least one bracketed variable.

Press the <Alt-D> key combination. That will display the Instant Database screen. The screen will probably be blank. See **Figure 1**. However, if the AutoScan feature has been selected, the screen will be populated with terms located in the AutoScan in the left column. In other words, the next step was automatically performed.)

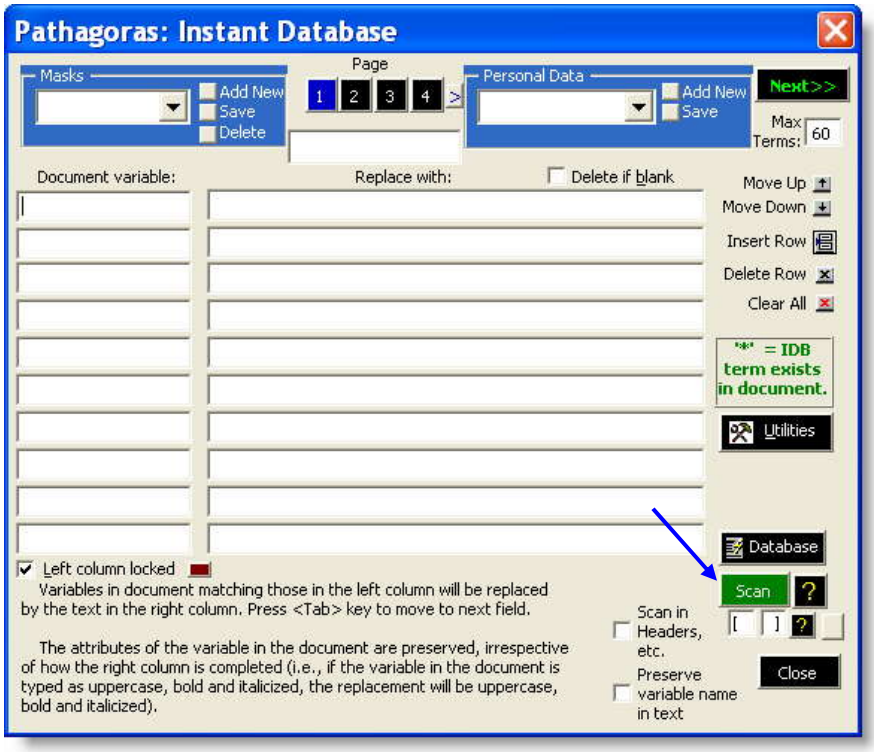

Figure 1. A 'blank' Instant Database screen. The 'search for' text (typically a Document Variable) will appear in the left column. You would provide the 'Replace With' text in the right column.

A click of the green <Scan> button in the lower right of the screen directs Pathagoras to search the document for bracketed terms. Pathagoras displays what it finds in the left column of the IDB screen. See **Figure 2.** You then propose text to replace the variables by typing appropriate 'personal' data in the right column. See **Figure 3.**

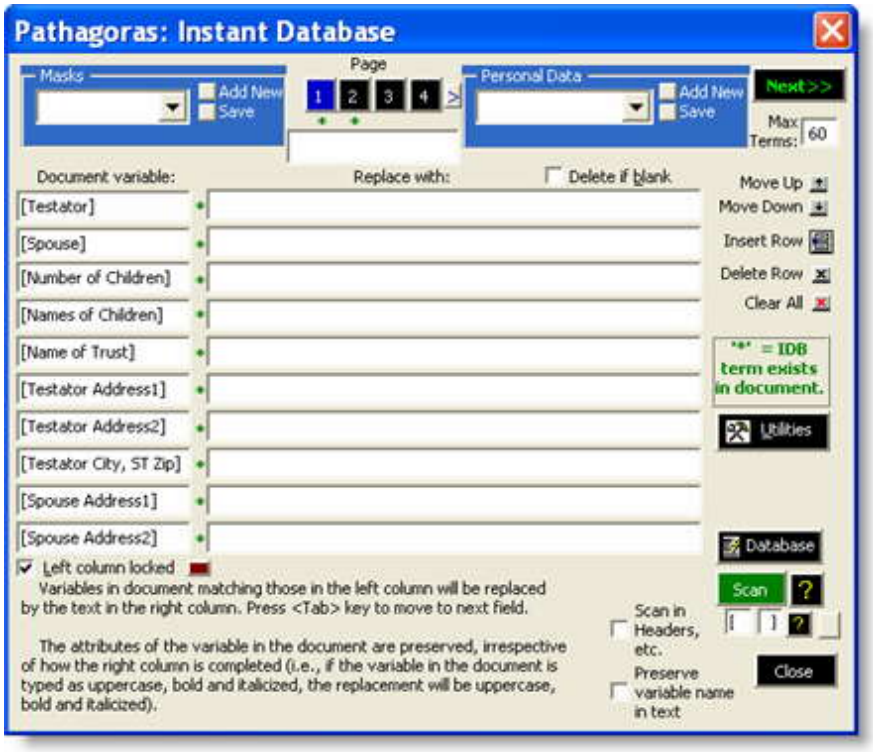

Figure 2 Document scanned. Bracketed variables placed in left column.

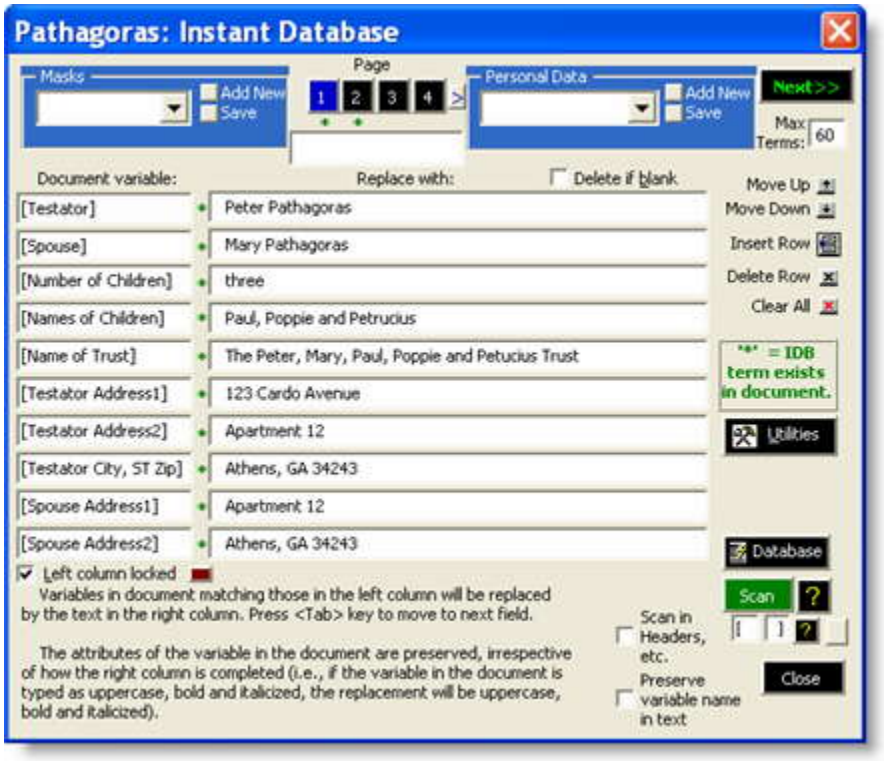

Figure 3. A 'completed' Instant Database form.

When you finish providing personal data, press the <Next> button and Pathagoras will replace throughout the document the variables with the personal data provided.

Well . . . that is not quite correct. Immediately after you press the <Next> button, and just before the replacements are actually made, Pathagoras will ask if you want to save the personal data as a 'Personal Data Record.' If you plan to compose more documents for this customer or client (e.g., future letters, forms, contracts, pleading, addendums etc.), you should say 'Yes.' When prompted, provide a meaningful and unique name for the record. (Typically, the client or customer's name, e.g., "Lastname, Firstname" meets this criteria.) Of course, you can also say 'No.' After *this* step, Pathagoras will make the replacements. (If you clicked 'Yes,' when you create another document for the customer or client containing some or all or the same variables, you need only drop down the Personal Data records list at the right side of screen, locate and click on the record. No need to reenter the personal information. That is what 'Instant Database' is all about!)

Instant Database *Mask*

The 'ad hoc' technique discussed above requires an on-screen document from which it can scan for bracketed variables. The presentation of variables will always be in the order in which they are found in the document. Advanced users will want to consider creating a Mask so that variable order-of-appearance (and other issues) can be controlled. They want a 'user-friendly' form with completion tips and examples to help others in filling out the form.

There are two basic methods to create a mask: (1) manually and (2) automatically. Regardless of which method you select, you will always be working with the InstantDatabase screen shown above. Pathagoras has chosen this single screen to perform multiple functions with the thought in mind that the more you use it, the better you will learn how to use it. The screen is simple

in its layout, but has many powerful tools just beneath the surface. The next section provides the details.

Instant Database Masks

A 'mask' is simply an Instant Database screen populated with variables on the 'left' side and perhaps completion tips at the right. It is saved out under a 'generic' name so that it can be recalled by a user who is assigning personal data to the variable represented in the mask. Because the variables needed to complete a 'Will' are significantly different from the variables needed to draft a 'contract' or a legal 'pleading,' you are likely to have several masks for your system, one for each genre of document (estate planning, contracts, litigation, bids and RFPs, etc).

Creating a Mask

Manually

A mask can be created 'manually' simply by displaying the IDB screen and hand-typing into the left column the variables that you anticipate using. You can have an unlimited number of variables, but the initial default number is 60. (To increase that number, simply overwrite the number "60" in the upper right corner of the IDB screen with any other number.)

After you finish inputting variables, you can arrange and rearrange the order of the variables, delete variables you don't want and insert others by using the buttons found at the right side of the screen. You can categorize your variables by using the 'Title' box in the top center of the screen. You can insert blank lines to shove variables down and onto different pages.

You should (but do not have to) enclose your variables within brackets. The brackets make identifying your variables a bit easier for you and the end users.

When you are satisfied with the variable name and order, save the screen data as a 'mask' by clicking the <Add New> button at the left ('Mask' side). Provide an appropriate name that reflects the 'genre' or subject matter of the documents in which you will be using these variables. E.g., "Estate Planning" or "Proposals" or "Domestic Relations," etc. See discussion on 'genre' below.

Tips: You likely will need several masks for a complete document assembly system. This is because the variables typically found in, let's say, a Will are probably quite different from those found in a Purchase Order. It is perfectly fine (indeed, it is a 'best practice') to have a variety of masks for a variety of situations.

Masks can be over-built. That is, they can have more variables in them than you might use with every document. In fact, a mask should have every possible variable that you might use for that genre of document, but it should not contain variables that you would never use.

Check out the section below titled "Making the mask more meaningful to the end user."

It is easy (very, very easy) to modify a mask. Don't worry if you don't have every variable in your mask when you save it. Don't worry if the order of the clauses in the mask is not the 'best.' Pathagoras lets you easily recall it and easily modify it later.

Automatically:

Manually typing in variables is easy, but there may be an easier way. If you already have a document that contains the bracketed variables you know you are going to use, recall it to the screen. Press <Alt-D> to display the IDB screen and then simply **<Scan>** that document. Pathagoras will locate all bracketed variables and will display them in the left column. All done!

Actually, you may not quite be done. You may wish to rearrange the order the variables appear in the list. (They appear in the order in which Pathagoras found them in the document, but that may not be the best or most logical order for the operator who will be completing the form to complete it. Further, you may wish to add new variables that other documents of the same genre might use. You can arrange and rearrange the order of the variables by using the buttons found at the right side of the screen. You can categorize your variables, providing even more visual guidance to the end-user, by using the 'Title' box in the top center of the screen. You can insert blank lines to shove variables onto different pages. *Then* you are all done.

Hint: Before scanning for variables in automatic mode, you will want to make sure that you have as many variables for that genre of document on the screen as possible. To do this, consider assembling one huge document containing at least one of every representative document in the genre or class of document for which you wish to create this mask. That's right! Assemble the largest Will and the most complex Power of Attorney and the biggest Trust all as one humongous document. (Just assemble it, don't save it.) Then press <Alt-D> and then **<Scan>**. Pathagoras will place all the variables it finds into the left side of the IDB screen. Rearrange the variables in a "makes sense" order and then save the mask with an appropriate name. (Doing this will also let you see if your variable names are consistent from document to document. A goal should be to reduce the number of individual variables to the smallest number possible. There really is no need to have [ClientName] as a variable in a Will and then [Client Name] in a Power of Attorney. They are of the same genre, and should share a common Mask and use identical variables.

In this context, 'genre' means 'general subject matter.' As said before, the variables in a Will will be quite different from the variables in a Purchase Order, but the variables in a Will may overlap those in a Trust and Power of Attorney. You should spend some time to make the variables in systems that are 'close' to one another the same. A "Testator" of a Will, a "Settlor" of a trust and the "Grantor" of a Power of Attorney are frequently the same person in an estate planning package. They are of the same 'genre.' Consider calling all of them the 'same thing' (so that the variable is completed only once.) Consider calling the variable something like "[Adult1]" instead of a topic specific name. Via a mask, you can give the end-user very specific guidance and instructions as to who or what 'Adult1' stands for. See how immediately below.

Making the mask more meaningful.

When you created the mask (whether manually or automatically), you ended up with the document variables at the left and nothing at the right. See **Figure 2,** above**.** That 'nothing' need not go to waste. It can be used to provide useful information to the end-user. You can provide instructions and guidance on how to complete the variable. You can give an example of what a properly completed variable might look like.

> Example: The variable [Date] might appear in your document and therefore in your mask. But what does [Date] mean to the end-user who might be seeing this variable for the first time? Even if the user could figure out to what 'Date' refers from its context, what style of date is expected. Full date, abbreviated date, numbers only?
>
> You can easily make the mask more 'user friendly' by typing in the space at the right of the variable a 'completion tip' such as the following "Date of Offer (e.g., "March 24, 2009")". This tip will be saved along with the variables and displayed when the mask is called up again.
>
> During an actual document session, the tip will advise the operator not only to what 'date' the word "Date" is referring but it shows the 'style' of the date that is being requested ("March 24, 2009" as opposed to "03/24/09" or any of the half-dozen other possible date formats.) See Figures 4 and 5 below for more examples.

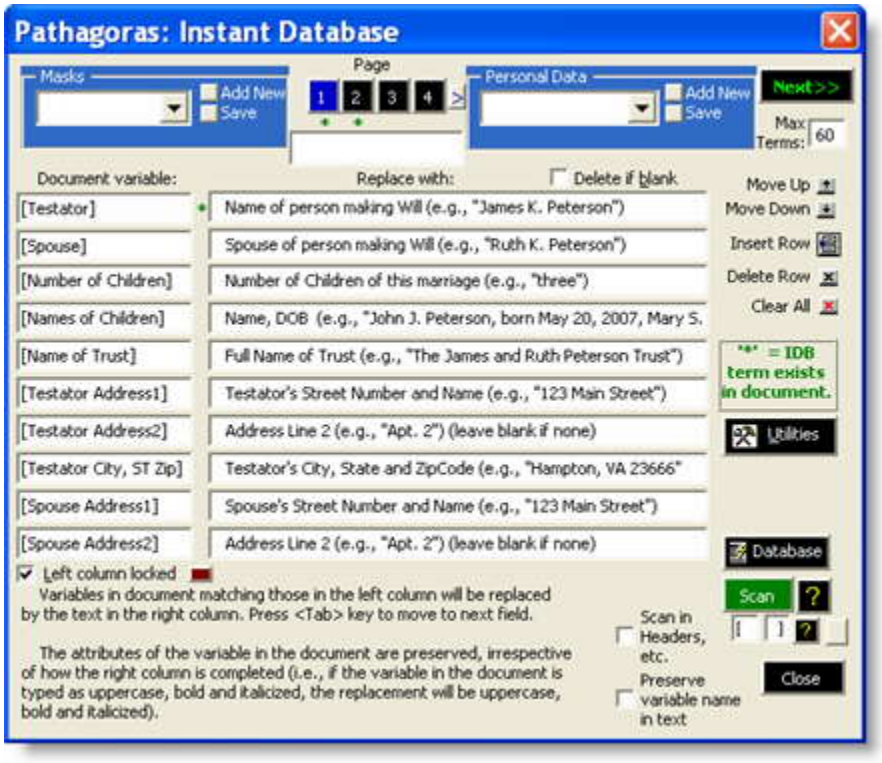

Figure 4. A Mask with 'Completion Tips' provided at the right.

You can rearrange the entries in mask to make them more consistent with your intake sheets or more logical for your staff to complete. Consider the following:

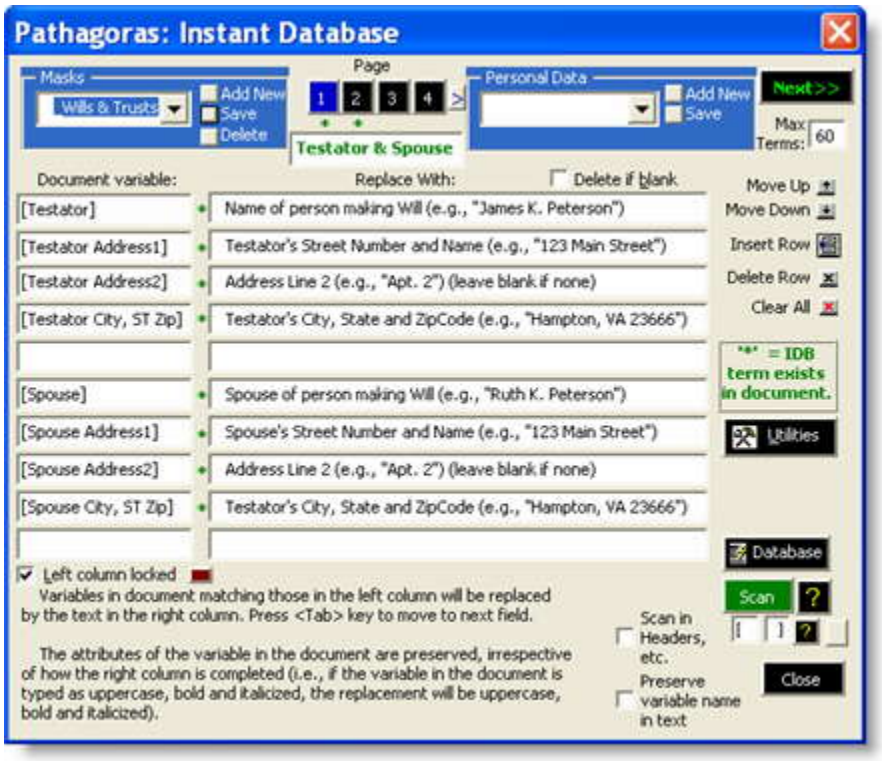

Figure 5. Using the Move Up/Down Arrows and the center 'Topics' box, this Mask has be made more 'user-friendly.' Even a 'topic' has been added to the page.

(A separate topic can be assigned to each page.)

Automatic Display of Proper Mask at end of Document Assembly Session:

It is easy to activate the Instant Database system. Just press <Alt-D>. However, that still requires the end user to know which mask has been prepared for which genre of document. In many offices that is easy, but not always.

Assigning a Mask to a book. You, as system administrator, can pre-assign a Mask to a book. That way, when an <Alt-D> call is made after a document has been assembled, the assigned mask will instantly appear. This avoids the necessity for the end-user to remember which mask relates to which book.

Here are the steps:

1. Click the Document Assembly icon to display the Libraries & Books screen.
2. Click the <Settings> button.
3. Click the AutoIDB tab on the right side of the screen. On the row parallel to the book to which you wish to assign the Mask, drop down the list of available Masks and select the one you wish. (See **Figure 6** below.)

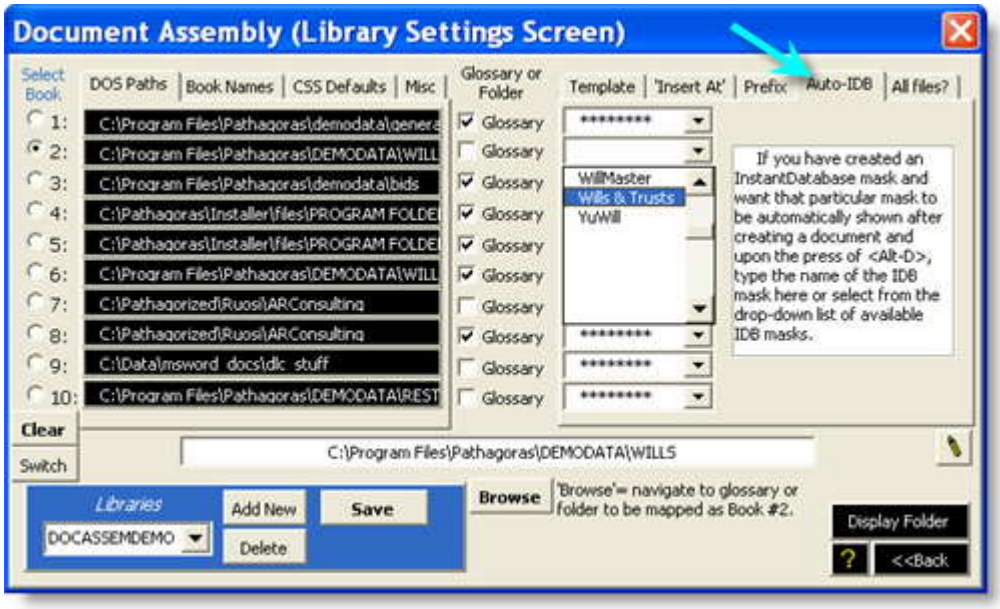

Figure 6. Associate an Instant Database Mask with a book.
The dropdown list contains all saved masks. You select the one designed for this particular book.

4. Save the <Settings> screen to lock in the association. The next time you assemble a document from that book and press <Alt-D> to personalize the document, Pathagoras will automatically display the pre-assigned mask.

Now, after document assembly, when <Alt-D> is pressed, not only will the Instant Database form appear, but it will appear already displaying the designated mask.

One more note: Some users wish to complete the personal data *before* building the document, not after. Or perhaps a staff member has been assigned as the 'data-enterer' and has nothing to do with document production. The above setup lends itself well to that scenario. Let's assume that a mask has been assigned to the book as shown above. When the user clicks the Document Assembly

icon, and then clicks a book to which an AutoIDB mask has been pre-assigned, a button will appear on the screen that reads "Personal Data Record." If clicked, the IDB screen appears with the proper mask in place. The user can provide the personal information, save the record and then move on to something else.

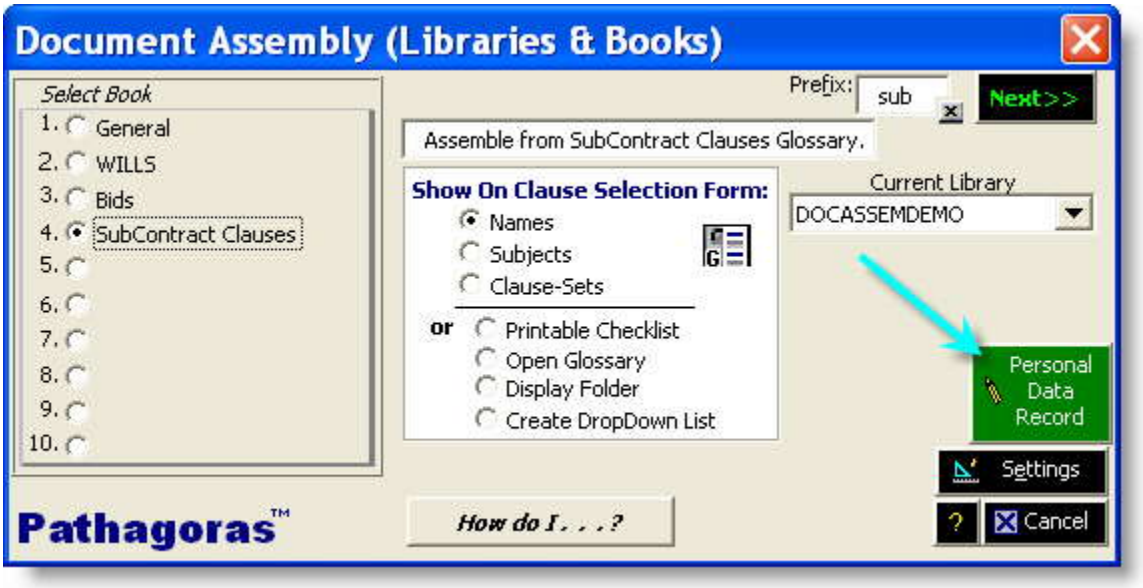

Figure 7. The 'Personal Data Record' button exposed.

Using a Mask to create/modify documents.

A mask actually serves two distinct purposes. Its primary purpose, as described above, is to allow you to replace variables with personal information in the final step in the document assembly process. However, you can also use a mask to assist you in creating the source text. You can use a mask to quickly insert variables into the source text and to insure consistence in your variables as you are doing so.

When you are adding variables, you (or your staff) won't have to remember whether the standard variable for the customer's name is "[Customer Name]" or "[CustomerName]" or "[Customer's Name]"? The mask that you created in earlier steps can be displayed and used as the source for inserted variables. There are two ways to move variables from a mask into a source clause. Each is easy. The first is the easiest (literally, point, drag and release) but offers the fewest options:

(1) Display the document you want to neuter. Then display the IDB screen (<Alt-D>)and recall the appropriate mask (left side drop down list). Place the cursor inside the text box containing the variable you want inserted into the document. Left click, drag and drop. That's all there is to it!

OR

(2) (a) On the Pathagoras dropdown menu is an entry called "Neuter Text." Click it. When you do, the Variable Creation Assistant will appear on your screen. **Figure 8.** It will 'float' above your text and you can move it around as needed).

Figure 8. The Variable Creation Assistant
(Note that the single action available when the Assistant appears is "[Bracket Text]." If you don't want to manually type brackets around text, simply highlight the text you want to become a bracketed variable and click this button. Pathagoras will offer to change every other instance of that term in the document into a bracketed text as well.)

(b) To select a mask, click the down arrow on the drop down box. This will display all of the existing masks for your system that you or others have created. **Figure 9.**

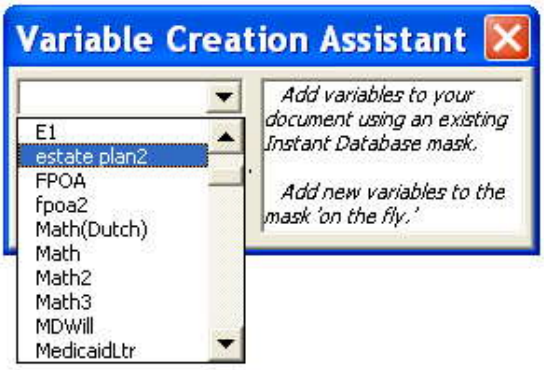

Figure 9. Variable Creation Assistant displaying all available Masks.

(c) Select the Mask you want to use to neuter this document. The screen will reconfigure itself and offer you many new options.

Figure 10. The 'expanded' Variable Creation Assistant. By clicking the dropdown list, you can select any variable in the Mask.

(d) The dropdown list is re-configured to contain the variables in the selected mask. Place the cursor where you want the variable to be inserted, drop down the variable list, point and click. It is very easy! (Note the wide variety of other options available via this screen. They are discussed in other lessons.)

Date and Date Math features

If you create a variable which includes the word "date" in any form, Pathagoras will display a new button which if clicked, will present a calendar from which you can (1) pick a date and (2) perform date math (add a certain number of days, weeks, months or years to a starting date). The button is a small green square that will appear between the two columns on the same row as the variable being processed.

Calculator and Equivalency features

a. Pathagoras allows you to build simple formulas and to assign the result of the formula to a variable. For example, three variables might be called [Price], [Quantity] and [Discount] and [Bottom Line] price. At document assembly time, the user would be expected to insert the appropriate values for the specific customer. You can take advantage of the calculator feature by inserting as the 'value' for the the fourth variable the following linear formula:

[Price]x [Quantity] - [Discount] (if the discount is a flat amount) **OR**

[Price]x [Quantity] * [Discount] (if the discount is a percentage).

When Pathagoras detects a 'formula' in the 'personal data' side of the IDB screen, it will displays a small red button between the two columns. (Similar to the 'date picker' button.) Click the button and the fomula is processed. If, during the process of completing the mask, any precedent figure changes, the [Bottom Line] price can be recalculated by two successive clicks of the calculator button. (The first click restores the formula, the second one recalculates using the new values.)

b. Pathagoras provides access to simple calculator right on the IDB screen. Activate the calculator by pressing the small red rectangle just beneath the last entry on the screen. See **Figure 15**.

Linking to an external database.

Pathagoras allows you to link to external databases. Typically, you would do so either by creating linking fields in your document via Word's Mail Merge features or (if you want to preserve the simple, plain text variables in your document) by creating a linking table using Pathagoras. Databasing with external programs are considered 'advanced user' techniques. They are not further discussed in this Manual. See Databasing if you wish to read more.

Caveat: External database linking has been available for years. However, we at Pathagoras have discovered that it is a rarely used feature. IDB is by far the tool of choice for replacing variables with personal data and for storing the data as Personal Data Records, even among those users who have extensive external database records. "Why is that?," you may ask. "Why would users put their data in twice?"

> The main answer is that for most users, and for most external database systems, the data collected by the external system simply is not the same data needed for the documents being assembled. (Some is, of course, but not sufficiently enough to make the effort at linking everything together worthwhile.)
>
> Take, for example, a Last Will & Testament. The external database might have the names of the maker of the Will and his or her spouse, but rarely would the beneficiary or Executor or Guardian names, or 'Trust Termination Date" be collected. (Many external databases collect information for billing purposes and not much else. Exceptions exist, and when they do, the external linking features of Pathagoras may be worth exploring.) These document specific variables can best be accounted for only within the document and best gathered together and answered by Pathagoras' InstantDatabase system.

Other uses for the Instant Database Mask

Simple Find and Replace using IDB

After displaying the form, type into the left hand column any text that you want replaced throughout the document. While the terms could (and typically will be) variables in the current document, the left-column terms could just as easily be standard words that you simply wish to be replaced with other words. In this regard, we want to remind you that the Instant Database module is nothing more than an elaborate "Find & Replace" tool. However, instead of replacements being made one at a time, they are done 10, 20, 100 at a time.

In the right column, type the information that you want to substitute for that which you have typed at the left. When all "find" and "replace with" terms are listed, press the <Next> button. (Unless you want to save the data on the screen for reuse, answer "No" to the questions "Do you want to save the data as a personal record?") Very quickly, Pathagoras will locate each instance of the "find" text and replace it with the corresponding "replace with" text.

Make a 'Sex Change' Mask

This is not what you think. This is simply a device by which you can reverse 'he' and 'she' and 'him' and 'her' throughout an entire document. We believe that the following 'pattern' with take care of the issue. It is also illustrative of how the IDB mask can be programed to handle other housekeeping chores when you do not want to create an elaborate mask.. (Notes: there must be spaces on each end of each word. That prevents the possibility of the change from he to she from affecting words that contain 'he'. So 'the' (which contains 'he') does not become 'tshe'. The 'xxx' serves to make sure that the order of replacements are maintained.

Variable	Replacement Text
she	shexxx
her	[himxxx/hisxxx]
hers	hisxxx
female	malexxx
woman	manxxx
(any other female sex based term)	
he	she
him	her
his	[her/hers]
male	female
man	woman
hexxx	he
hisxxx	his
hisxxx	his
malexxx	male
manxxx	man

'Her' and 'His' are always tough ones.

Consider:

her car → *his* car

vs.

to **her** → to *him*]

We propose that you bracket the replacement text for these pronouns and that you use ***GotForms?*** <Alt-S> to make the replacements in the actual context.

This is but one of any number of 'transformational' masks that you could create. (Something like the above is not necessary with a typical 'Pathagorized' document. Groupings, discussed on an earlier page can easily take care of gender based pronouns. But the above, and others like it, are 'cool tricks' when it comes to modifying documents that have not yet been Pathagorized.)

Concluding notes

(1) A user would save an IDB mask that contains personal data in order to reuse that data in a different document for the same client/customer. Consideration, therefore, should be given to using a common variable naming scheme across a range of similar or related documents. For example, wills, trusts and powers of attorney might contain similar naming schemes. A mask can support multiple documents. The IDB personal record saved for a particular client/customer could likewise be used for many other documents for the same client/customer. So as you are creating variables, keep in mind this 'multiple duty' concept.

(2) The mask can, and actually should, contain all variables that the user might encounter in any document to which the mask might be applied. It doesn't matter that the mask is 'overbuilt' compared to a specific document for which it might be used. Pathagoras will tell you (by a green asterisk between the left and right columns) which variables exist in the current document. It will simply ignore any variables in the mask that do not exist in the document.

(3) You can easily add variables to a mask by recalling the mask, moving to a blank line in the mask and typing in a new variable name in the left column. You can insert a line between two existing variables with the Insert Line button at the right side of the screen.(You can also Scan for variables, and any new ones will be added at the bottom. Reorder the variables using the Up and Down buttons.)

(4) By thoughtful use of variables and masks, you can transform plain Word documents into powerful interactive and automated templates without coding or complicated fields. Pathagoras does it all with plain text.

(5) Networked systems: Registered network users can easily have access to, or share common IDB masks, with other users. 'Having access to' a mask refers to the process of sharing a copy of the mask via the Common Profiles Path. This is typically accomplished via the Network Files tab in the Utilities/Settings screen. Actually sharing of the same mask means pointing to the identical location using the File Locations settings. Here is a description of the differences between uploading an InstantDatabase mask to the Common Profiles Path (or downloading one from the CPP) and 'sharing Instant Database Masks'.

a. In the former situation, you simply upload/download the current version of a Mask from one location to another. Other than the fact that the files look alike as you are moving them, they are not 'the same file.' You might share files via the CPP if (1) you are essentially a stand alone operation, (2) frequently are away from the network or (3) rarely have a need to use the masks created by another user.

   In these settings, the administrator should simply upload 'community' masks to the CPP when changes are made, and end-users should download one or more of the masks if they are ever needed.

b. In the 'sharing IDB masks' scenario, IDB pointers all point to the same file on the network. This is common where (1) the end-user, who is always connected to the network, shouldn't be burdened with uploading, downloading or editing masks (i.e., that is the job of the administrator) or (2) masks are changed with some frequency and it is important that users have access to any changes in 'real time,'

In such settings, the end user (and the administrator) should set their IDB file setting to point to a common location. This is done via the Instant Database Tools|File Locations page. In this manner, the administrator and all end-users will always be looking at the same collection of Masks (and if so set, the same collection of Personal Data Records.

(More Screen Shots and Examples follow on next pages.)

The Instant Database form is a remarkable multi-purpose tool.

- At its 'simplest,' the Instant Database form is a 'find and replace' device. In this regard it is not unlike Word's built in Find & Replace function. However, unlike Word's version (which operates on terms one-at-a-time), Pathagoras can search for and replace many (up to 999) terms at one time.
- At its most sophisticated, IDB provides the user a means to save personal data about a client or customer and use the same data repeatedly to personalize documents. It is a full-fledged database, without the programming typically needed to make databases operational.

Screen Shots and Examples:

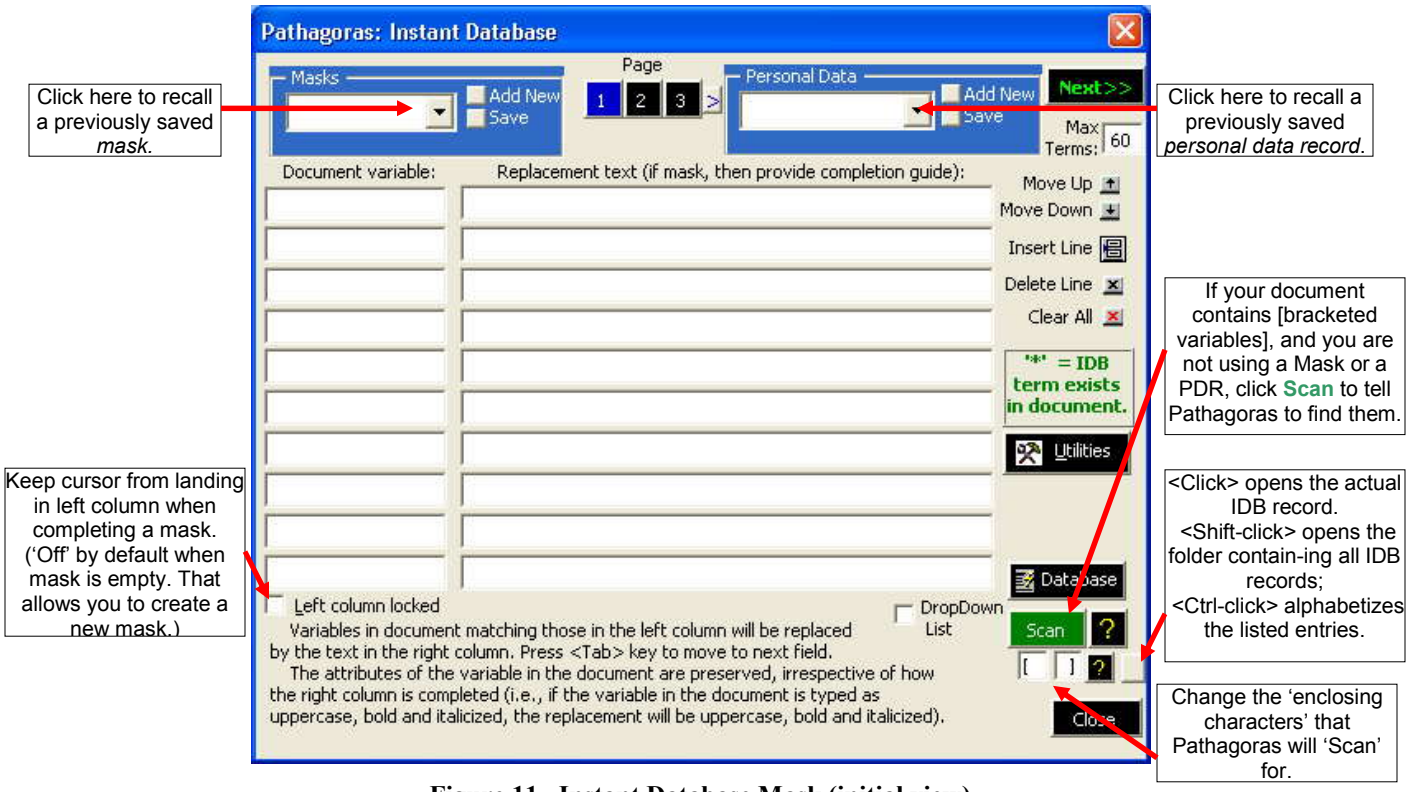

Figure 11. Instant Database Mask (initial view)

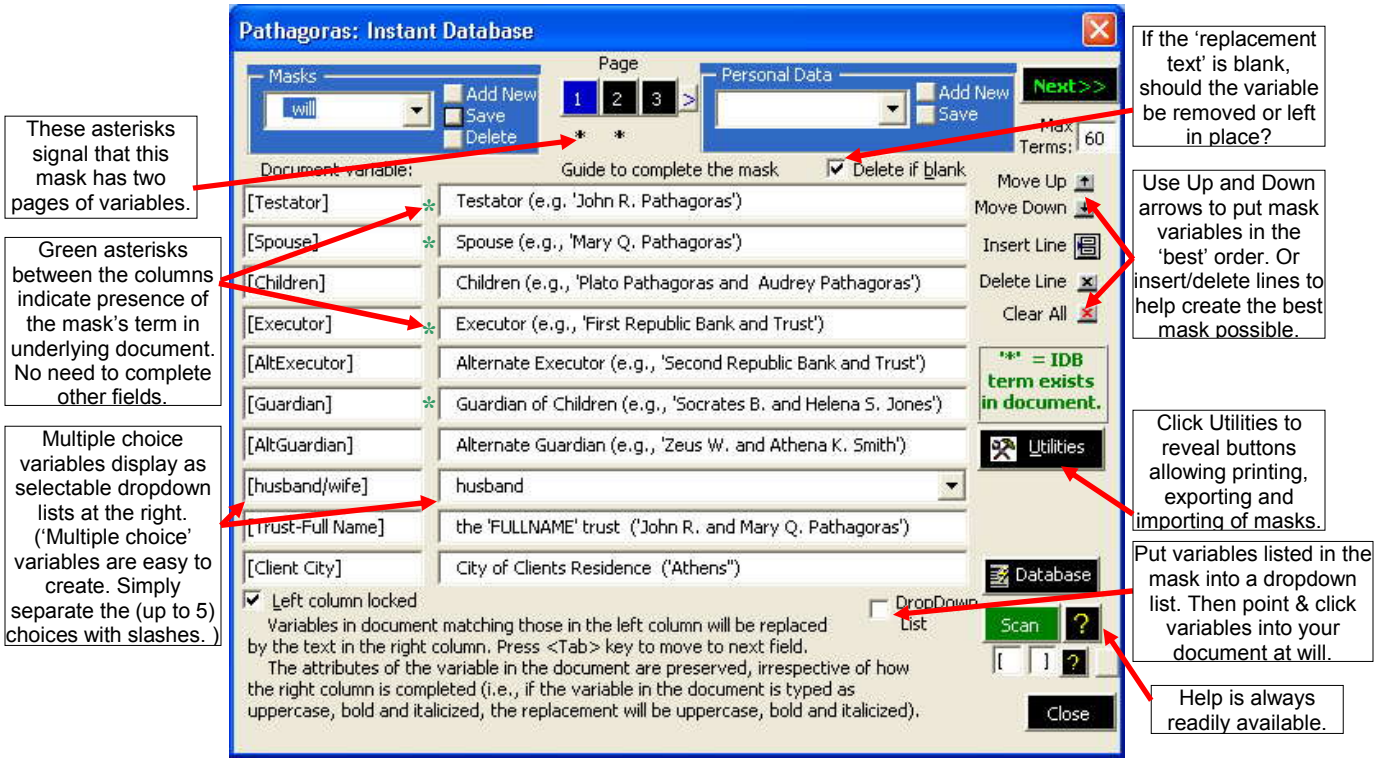

Figure 12. Instant Database Mask (filled with helpful completion hints)

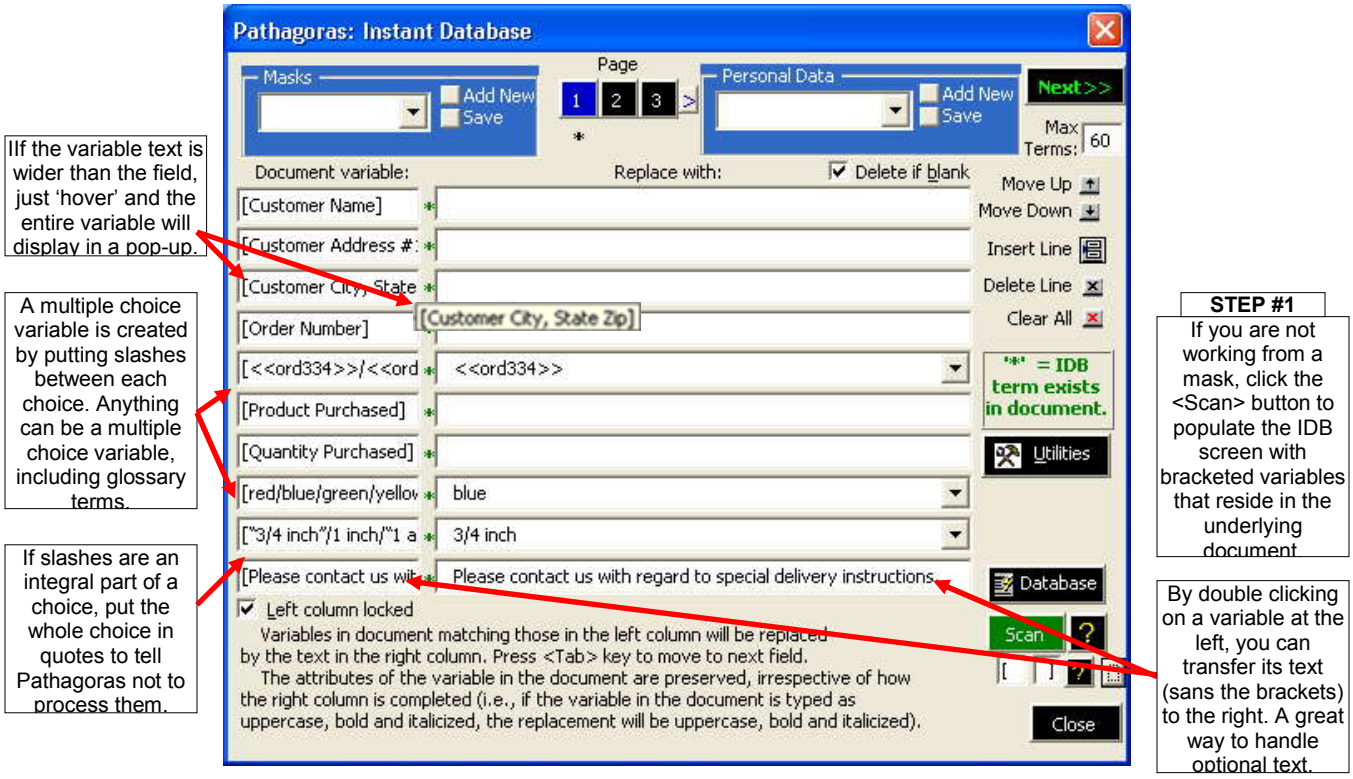

Figure 13. Results from a <Scan>.
All variable displayed in the left column are plain text, [bracketed variables] in the underlying document.

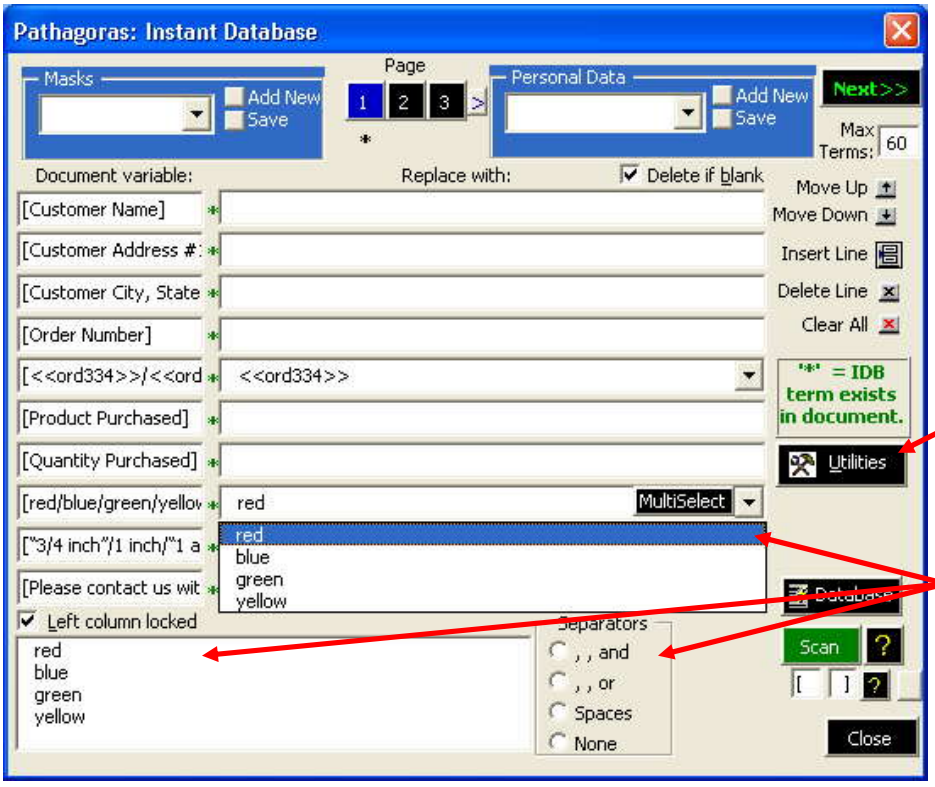

Figure 14. IDB: Multiple Choice Options

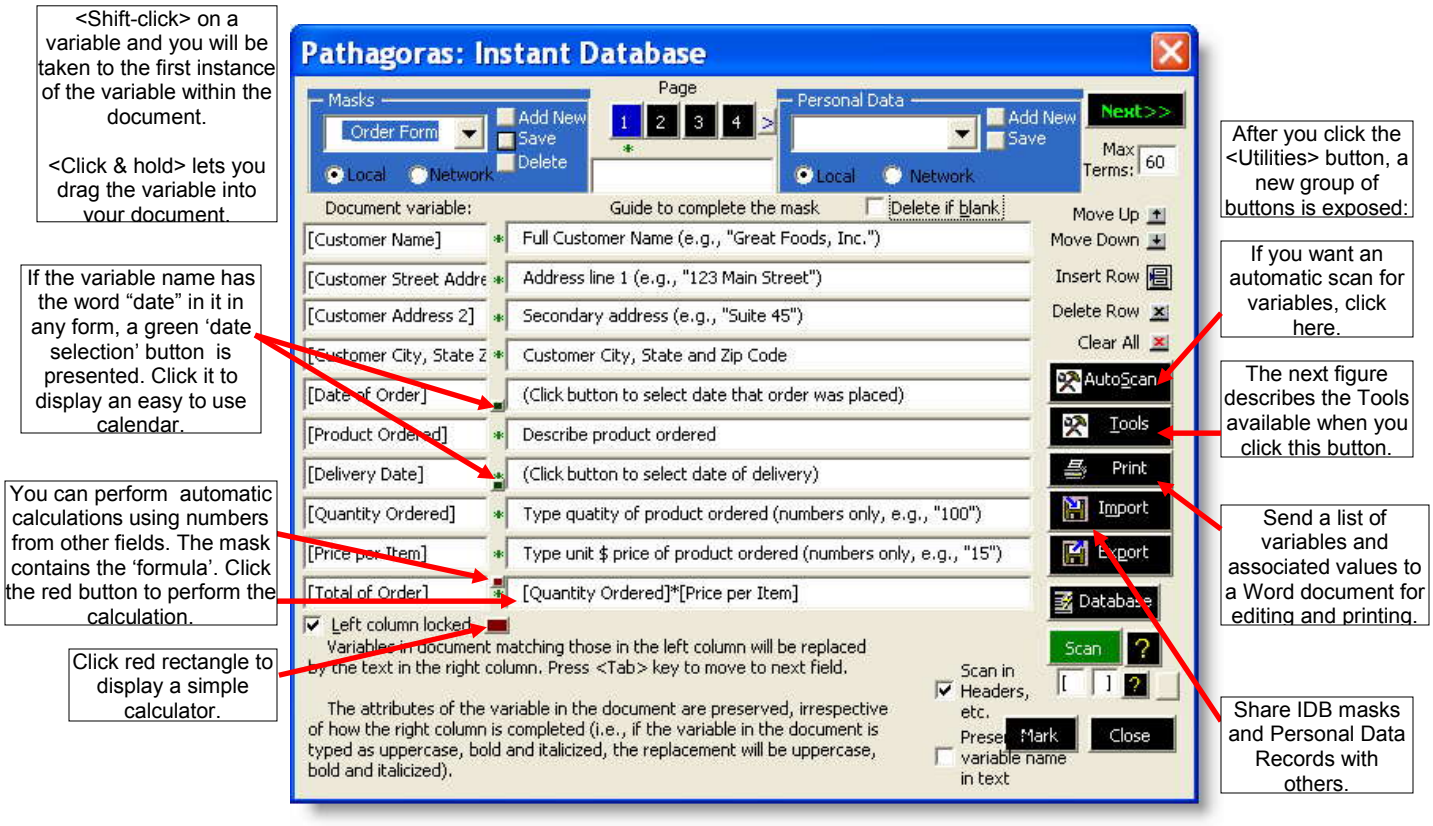

Figure 15. More IDB features, including Date Picker, Calculator functions and Utilities button clicked.

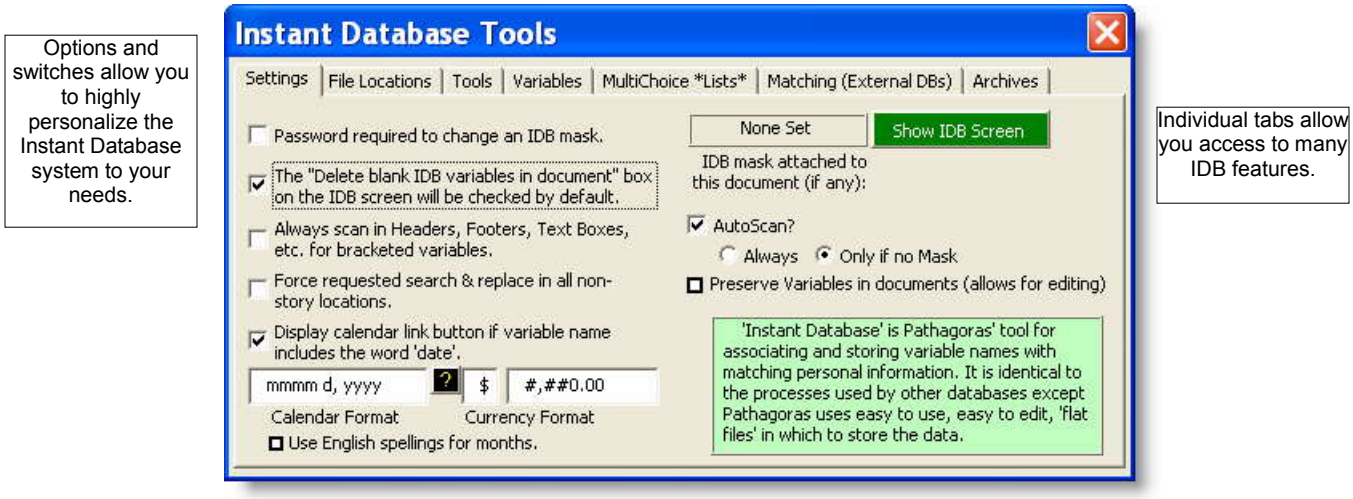

Figure 16. Instant Database Tools (front page –Settings).

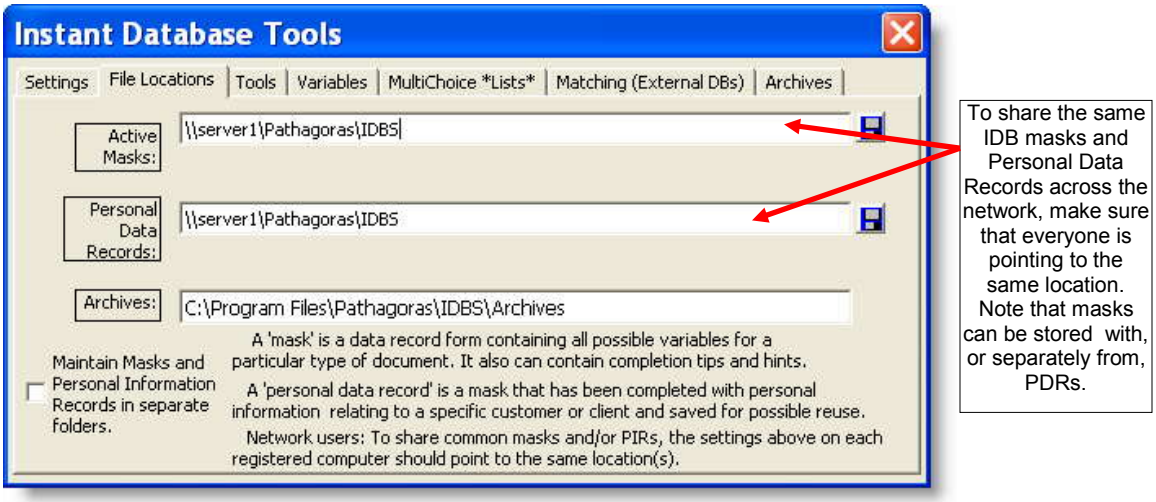

Figure 17. IDB Tools (File Locations tab exposed).

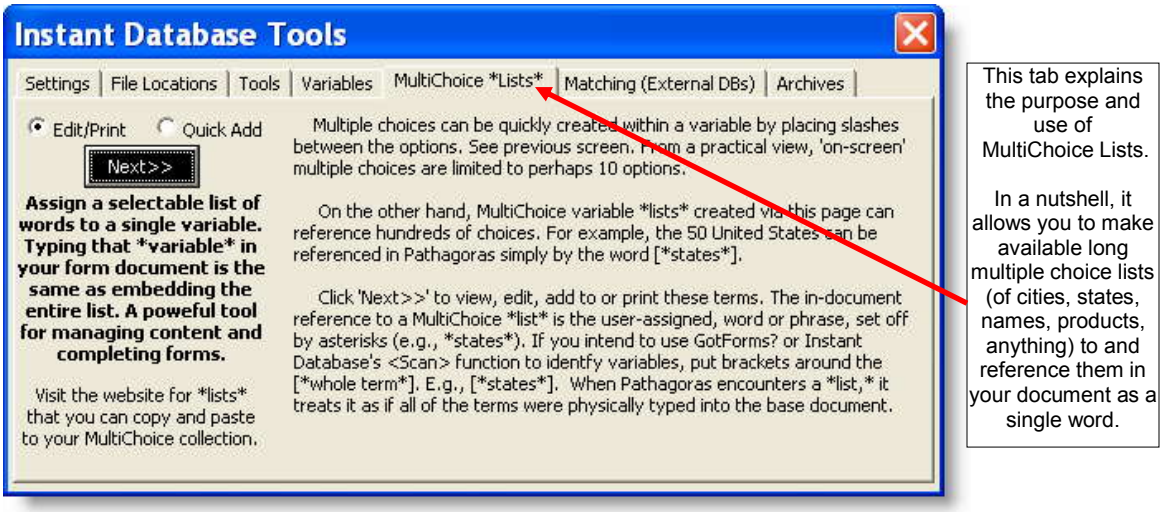

Figure 18. IDB Tools (MultiChoice *Lists* tab exposed).

GotForms? "<Alt-S>"

Have you GotForms? You probably do. ***GotForms?*** is so titled because the answer is typically 'Yes' even before you began using Pathagoras. If you have any forms on your computer, the variables of which are denoted by [words between brackets], or by underscore characters, then you have ***GotForms!*** And even if you don't have such forms, they are (obviously) very easy to create.

➢ Create and neuter your first form

This exercise duplicates previous ones whereby you are asked to neuter a document. If you already have documents with variables, you may skip this**:**

1. Recall a favorite document onto your editing screen. Look to see what variable information it contains. Names, addresses, quantities, colors, etc. Signature blocks. All of these can be variables.
2. Put brackets around each variable term (Simple ordinary brackets will do. No codes, nothing fancy). Replace the personal terms with more generic, descriptive term. (E.g., "[Client Name]" in place of "Jane Doe".) This will help future users understand what is needed to complete the variable at each stop point.
3. If you want to provide the user with a selection of options (e.g., "We ordered [quantity] [ounces/pounds/tons] of [chocolate fudge/vanilla cream/strawberry parfait] ice cream.") simply present the variables within the bracket, separated by slashes. The choices [chocolate fudge/vanilla cream/strawberry parfait] will appear as blue 'button' text on the Scanning overlay form. See the ***GotForms?*** screen shots below.

InstantDatabase and ***GotForms?*** are discussed in the same Guide because they essentially run off the same 'engine.' They use the same variables and replace them in the same fashion.

There are a few differences, however. Here they are:

- ***GotForms?*** is one variable at a time replacement.
- IDB is all variables at one time replacement.
- ***GotForms?*** can identify an underline as a variable. IDB cannot. (Actually, IDB could pick up underlines, but the inability of IDB to show the context in which the underline appears (which Gotforms? can do) makes 'underline' search and replace impractical, and therefore it has been disabled in IDB.)

➢ Complete a document with *GotForms?*

1. Simply display the form onto your editing screen. Then, press <Alt-S> (for 'scan') from your keyboard. This screen will appear:

Figure 19. *GotForms?* (first screen)
Note: You can choose any 'bracket' set you want.

2. Press the <Start Scan> button. ***GotForms?*** will scan the document and find each variable, one at a time, stopping at each to give you the opportunity to substitute personal values in place of the variables.

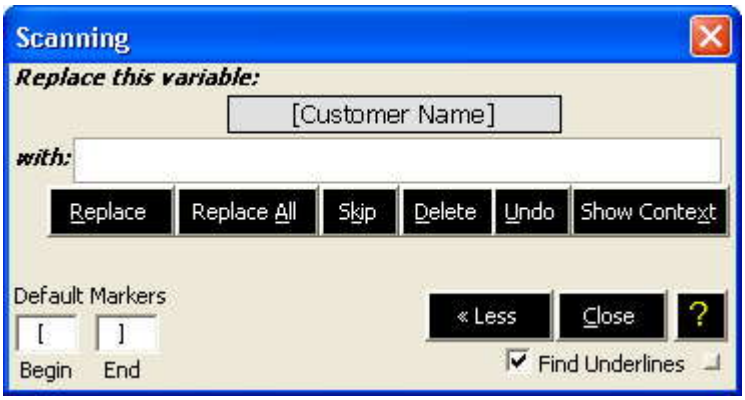

Figure 20. *GotForms?* showing single element variable.

3. If the variable is multiple choice (designated simply by slashes between the up to 5 choices, e.g., [chocolate fudge/vanilla cream/strawberry parfait]), the various choices as presented as selectable buttons on the Scanning Screen:

Figure 21. *GotForms?* scanning: multi-choice variable. Note selection buttons.

Once you have finished with the now personalized form, save it to where you normally save completed client or customer documents. (When you save the completed forms, make sure that you press "SaveAs" so that you don' t copy over the original. Or even better, use PATHAGORAS' SaveSmart features to save the new document to a SmartPath without any navigation whatsoever.)

> The "<<Less" button on the ***GotForms?*** screen adds a different dimension to the replacement process. When you click "<<Less", the main screen disappears and a small screen replaces it. AND the tab key (on your keyboard) turns into a field-to-field navigator. Replace on field, press tab, replace the next field, etc. This is similar to Word's built in text navigator, but the differences are marked. First of all, you don't have to protect the document to take advantage of field to field navigation. Secondly, if the variable you encounter is a multiple choice variable, the multiple choices will appear as buttons on your screen. Try that with plain Word!

Note: ***GotForms?*** and Instant Database work in very similar ways. ***GotForms?*** is one-term-at-a-time replacement. Instant Database is an all-at-one-time replacement device. If you would prefer to view and complete all of your variables at once, use the Instant Database feature discussed elsewhere. IDB uses the same scan engine, but places what it finds onto the left hand column of the InstantDatabase worksheet. InstantDatabase Scan can identify, present, search for and replace up to 900 separate variables in a single sweep. (Exception: Because you need 'context' to determine what is needed to complete a variable denoted by underscores ("_____") you must use ***GotForms?*** to fill in blank lines)

Hint: It is possible to mark up your text so that a ***GotForms?*** scan will pick up one set of variables and Instant Database scan another set. The more you become familiar with the strengths of the two systems, the more power you will see they bring to your word processing environment.

Now that you have learned how to use Instant Database and ***GotForms?*** you may want to learn more about how to create the variables that these two features process on your behalf. Variables in Pathagoras are simple to create, using plain text and standard keyboard characters. Read more about creating, using and editing variables by clicking this link.

Tricks and tips:

Double clicking on a variable name in the IDB mask will cause the text (but not the brackets) to transferred to the right side of the form. Great for optional text.

Shift-clicking on a variable name in the IDB mask will take you to the first instance of the variable within the document. Great for debugging and correcting variable spelling errors, etc.

Alphabetize entries: To more easily detect spelling errors involving similarly named variables, e.g., [ClientName],[Client Name],[Client'sName],[Client's Name], etc., you may wish to alphabetize the entries. Do this by <Ctrl-clicking> the unlabled button in the lower right section of the IDB scrreen. It sits at the right of the row that displays the enclosing characters. (See **Figure 11.**)

Drag: (1) You can drag (hold left mouse button while in a variable field) a variable into another box within the IDB screen itself to create an 'equivalency'

(2) You can drag a varialbe onto the editing screen. This allows you to quick create 'neutral' documents with properly formed and spelled variables.

Set-ups: **A** variable can reference a recallable clause (or a multiple choice selection of clauses) that is saved in a SuperGlossary or SuperFolder or referenced in the prefix pointer table. Just include the clause within plain text "<<" & ">>" markers (no quotes.) Example: (each term is a signature block) [<<rhlsig>>/<<jpwsig>>/kmvsig>>]. When encountered, the choices will be displayed in a dropdown list at the right side of the IDB screen or in numbered boxes on the ***GotForms?*** screen.

The same is true with regard to multichoice *list* variables. Example: assume that you have created a multichoice variable called [*Signature*]. The multichoice *list* consisting of "<<rhlsig>>/<<jpwsig>>/kmvsig>>". When encountered, the choices will be displayed in a dropdown list at the right side of the IDB screen or in numbered boxes on the ***GotForms?*** screen.