

Quick Start Guide

*<<*Options/Optional*>> Text*

Optional Text

<<*Options/Optional*>> text blocks are sections of text within a source document that can trigger an ‘include or exclude’ question for the end-user to respond. The blocks are exceptionally easy to create. The blocks are created simply by placing the plain-text boundary markers “<<” and “>>” and the introductory word *optional* or *options*.

For those who are familiar with HotDocs[®], GhostFill[®] (and many other document assembly programs), the ‘Optional Text’ concept is akin to what is used by ‘templates’ in those programs. You will likely find that Pathagoras’ <<*Optional Text*>> is easier to use because the coding involved in a HotDocs/Ghostfill template is simply non-existent in Pathagoras.

These are the two types of optional text blocks used in Pathagoras:

“Optional” text: This is pure ‘optional text.’ The optional text is typed into the source document. At document assembly time, the program will pause and ask “Include this text?” (or such other question as the user provides). The user need only select “Yes” or “No” to tell Pathagoras whether the text block should be retained in the final document.

“Options” text: This block ‘type’ allows the user to choose among several options. The choices typed into the source document, with each choice separated from the others by a simple, plain text slash (“/”). At document assembly time, these choices are presented to the user on a selection screen which lists each option. The user select one or more of the options shown.

How To (the ‘basic’ setup):

Optional text blocks use plain-text, standard keyboard characters. The example first illustrates an “Optional” text block. The second, an “Options” block:

<<*Optional*The widgets you have ordered are not currently in stock. We will ship them as soon as possible. If we have not shipped within 5 days of this date, you will have the option to cancel the order.>>

<<*Options*As per your request, the widgets will be shipped by Federal Express and we will bill you for the extra cost of shipping./As per your request, we will send the widgets by standard ground transport. This may take 3 to 5 additional days./As per your request, we will hold the widgets for pickup by your courier./The widgets you have ordered are not currently in stock. We will ship them as soon as possible. If we have not shipped within 5 days of this date, you will have the option to cancel the order.>>

In the first example above, when Pathagoras encounters the optional text block, it will highlight the text in the document and ask if you want to keep it (see Figure 1, below).

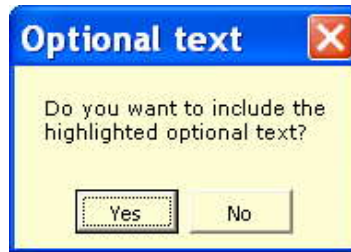


Figure 1 Optional Text dialog

If <Yes> is selected, the boundary markers are removed and the text remains in the document. If <No> is selected, the entire text block is deleted from the document.)

In the second example (the <<*Options*>> block, where plain-text slashes – “/” – separate the options), Pathagoras will parse out the individual choices and display them onto buttons. (If the text is too long to fit, only the first 200 characters of the option will display.) Checkboxes are shown at the left of each choice in case more than one option is desired.

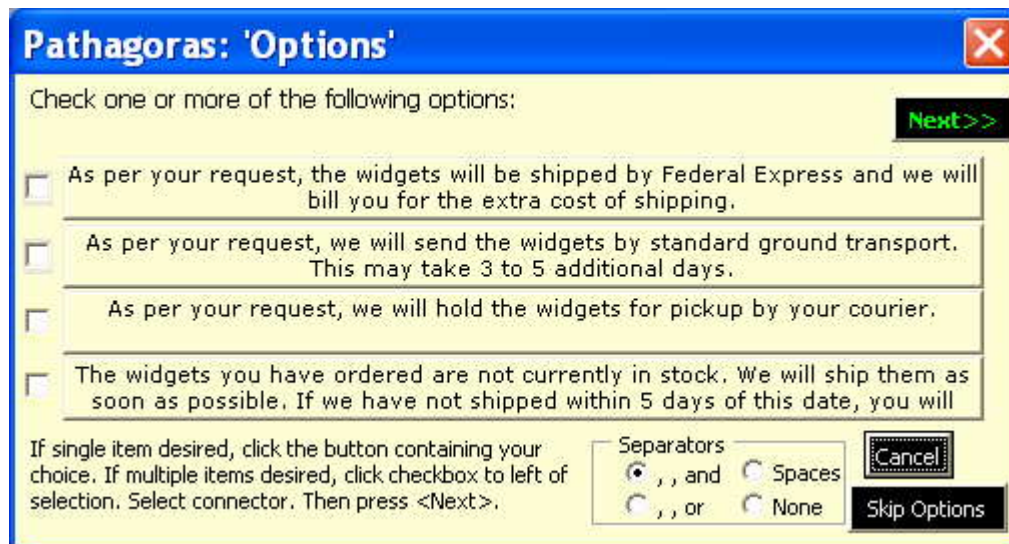


Figure 2 Options block dialog.

Note that the actual text of the option is provided (subject to space constraints.)

How To (advanced setups and usage):

<<*Options/Optional*>> text blocks offer tremendous flexibility and control with just a little more setup than the above examples required. The author can provide a more meaningful “keep or delete” question, can create option ‘groups’, and can nest text blocks to any depth.

<<*Optional*(prompt)* ..>>

If you wish to provide a more descriptive question for the end user to respond in deciding whether to keep or discard the optional text block, simply type the prompt after the <<*Optional* introduction. Mark the end of the prompt with another “*”. Example :

<<*Optional*Include ‘Widgets Not in Stock’ text?*The widgets you have ordered are not currently in stock. We will ship them as soon as possible. If we have not shipped within 5 days of this date, you will have the option to cancel the order. >>

Make sure that the prompt is answerable ‘Yes’ or ‘No,’ with the ‘Yes’ answer resulting in inclusion of the text, and ‘No’ resulting in deletion of the text. (Note--the colors in the above and the following examples are for illustration purposes only.)

When encountered during document assembly, the prompt between the asterisks is presented instead of the default question shown in Figure1.

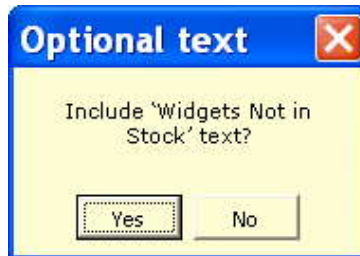


Figure 3 Optional Text (displaying user provided question.)

If, upon reviewing the actual layout, you decide that the question needs reworking, simply open the source document and rework the question. It is as simple as that because it is only plain text.

`<<*Options*prompt1 /prompt2/prompt3/prompt4/prompt5* . . . >>`

Perhaps in an `<<*Options*>>` block, you want to provide a series of shorter, easier to understand, prompts from which the user may choose. To do so, type a short description (prompt) of each option immediately after the `<<*Options*` introduction. You should have as many short descriptions as you have options (up to 5). Close the description list with an `“*”`.

`<<*Options*Ship FedEx/Ship Standard Ground/Hold for Pickup/Out of Stock*As per your request, the widgets will be shipped by Federal Express and we will bill you for the extra cost of shipping./As per your request, we will send the widgets by standard ground transport. This may take 3 to 5 additional days./As per your request, we will hold the widgets for pickup by your courier./The widgets you have ordered are not currently in stock. We will ship them as soon as possible. If we have not shipped within 5 days of this date, you will have the option to cancel the order.>>`

That will yield the result shown in Figure 4, below:

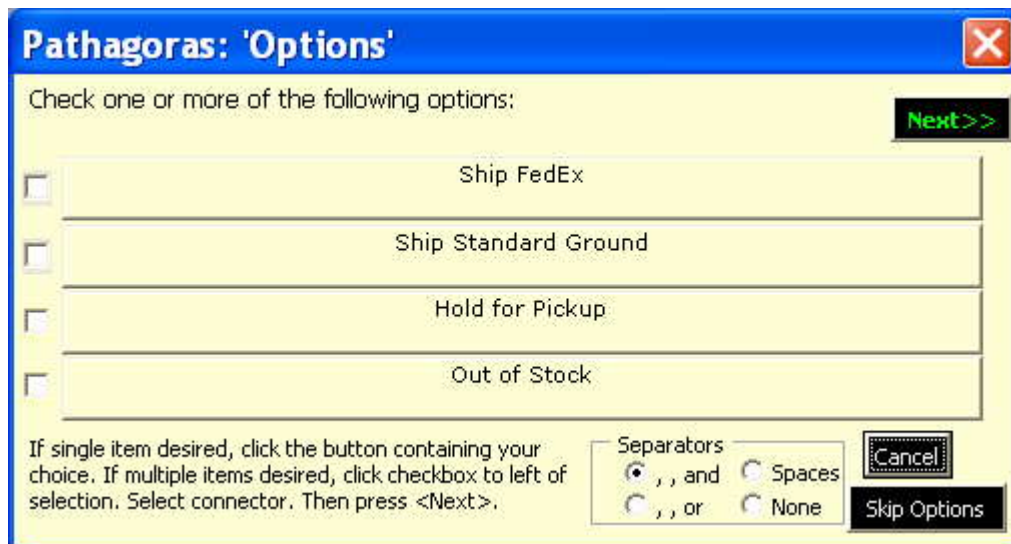


Figure 4 Options block, with descriptions provided. (Compare to Figure 2)

The “Radio Buttons” Option

If you look carefully at the result in Figure 4, you will see checkboxes next to each option and a “Separators” box at the bottom. You may be thinking, “These options are mutually exclusive. Why am I allowed select more than one?” If you would like to prevent the user from accidentally choosing more than one of the options, you may want to use ‘radio buttons’ next to the choices. Pathagoras can handle that for you. Simply add the word “(radio)” (parenthesis required) next to the word <<*Options. Thusly:

```
<<*Options(radio)*Ship FedEx/Ship Standard Ground/Hold for Pickup/Out of Stock*As  
per your request, the widgets will be shipped by Federal Express and we will bill you for  
the extra cost of shipping./As per your request, we will send the widgets by standard  
ground transport. This may take 3 to 5 additional days./As per your request, we will  
hold the widgets for pickup by your courier./The widgets you have ordered are not  
currently in stock. We will ship them as soon as possible. If we have not shipped within  
5 days of this date, you will have the option to cancel the order.>>
```

And this is the result:

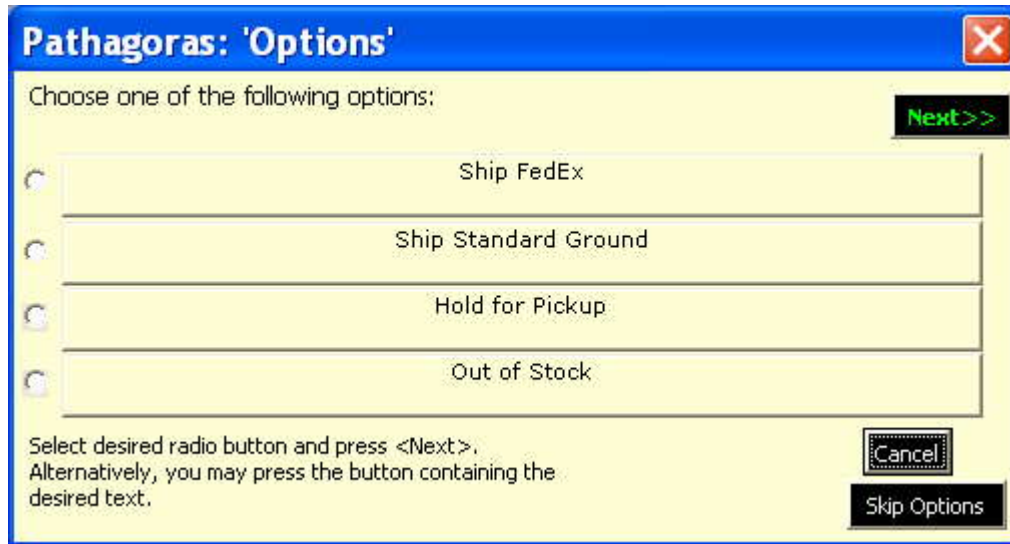


Figure 5. Options presentation with 'radio' buttons. (Compare to Figure 4)

Summary of basic <<*Options/Optional*>> text box structure:

<<*Optional* --the user is asked whether the entire clause should be kept.

<<*Options* --the display allows the user to select one, several or all of the (up to 5) options. The user is also allowed to select separators (commas or spaces) and a connector (“dog, cat, frog and fish” or “dog, cat, frog or fish”)

<<*Options(radio)* --the display allows the user to select only one of the (up to 5) options.

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[http://www.pathagoras.com/Manuals/Quick Start Guide \(OptionsOptionalText\).doc](http://www.pathagoras.com/Manuals/Quick Start Guide (OptionsOptionalText).doc)

Nesting:

Nesting of <<*Options/Optional*>> text block is allowed. As a practical matter it is not advisable to nest beyond two or 3 levels. This is not because the system itself is limited. Rather this limit is suggested because it gets confusing to the eye to have nestings too deep.

Here is one example of nesting based on the above examples. The nest is in the last option:

<<*Options(**radio**)*Ship FedEx/Ship Standard Ground/Hold for Pickup/Out of Stock*As per your request, the widgets will be shipped by Federal Express and we will bill you for the extra cost of shipping./As per your request, we will send the widgets by standard ground transport. This may take 3 to 5 additional days./As per your request, we will hold the widgets for pickup by your courier./The widgets you have ordered are not currently in stock. We will ship them as soon as possible. If we have not shipped within 5 days of this date, you will have the option to cancel the order. When available, the widgets will be shipped by: <<*Options(**radio**)*Federal Express/Standard ground transport/Per your request, we will hold the widgets for pickup by your courier.>>>>

As you are designing <<*Options/Optional*>> text blocks, please note that the text need not be a solid block (as the above examples were). <<*Options/Optional*>> text blocks can be multi-dimensional, just like Word documents can be. You can have single or multiple, paragraphs, add 'character' to the text (color, emphasis, even pictures). You can add any dimension to make the block meet your specific need. (Just a reminder. The various elements of the text block in the below illustration are 'painted' red and blue. These colors are for emphasis only. Colors are not required.)

<<*Optional*My favorite foods are:

<<*Options***Vegetables**



My favorite vegetable is <<*options(**radio**)*tomatoes/potatoes/squash/beans/none of the above>>/

Fruits



My favorite fruit is <<*options(**radio**)*peaches/<<*options(**radio**)*Macintosh apples/Golden Delicious apples/Granny Smith apples/plain ole apples>>/plums/bananas>>/

Grains



My favorite grain is <<*options(radio)*whole wheat/barley/oats/beer>>
>>>>

Also note that Pathagoras always works on <<*Options/Optional*>> text blocks from the outside in.

Groupings:

Still another variation within <<*Options/Optional*>> text blocks is the concept of ‘groupings.’ Sometimes, the answer to a particular question will lead to a particular answer to a subsequent question. In such cases, rather than responding to each <<*Options/Optional*>> text block, you can create text block ‘groupings.’ When you answer the question, or select a certain option (or set of options) from the first member of the group, Pathagoras will hunt down other members of the group and select the corresponding choices. E.g.,

We suggest that the color for the living room be <<*Options*!colors!red/yellow/burnt orange>>
and the contrasting trim color be <<*Options*!colors!yellow/purple/royal blue>>.

Note: The automatic selection of subsequent choices by Pathagoras depends upon the position of the first choice, not its answer. So, in the above example, if ‘yellow’ (the second option) is selected when the first *options* block is encountered, ‘purple’ (the second option in the subsequent options *block*) will be selected automatically when it is encountered.

Note: The group name (the text between the two “!” marks) can be no longer than 30 characters.

Miscellaneous Information:

Variables: In other lessons, you learned that plain text variables (place holders for personal data) can be inserted into your documents at strategic locations. That way, and using Pathagoras’ Instant Database or *GotForms?* modules, the document can be quickly personalized for the client or customer.

Variables in Pathagoras are typically created by placing a meaningful word or phrase within brackets: e.g. “[Client Name]” or “[Customer address]”). Multiple choice variables are merely bracketed variables with the choices separated by slashes (e.g., “[red/white/royal blue]”)

Variables of any nature can be placed anywhere within an <<*Options/Optional*>> text block. The variables are kept intact while Options/Optional choices are being made. Any remaining can then be processed during the ‘final’ (Instant Database or *GotForms?*) phase of the document assembly process. However, <<Options/Optional*>> text blocks may not be placed within bracketed variables.

Color coding your brackets and braces. Once you work with <<*Options/Optional*>> text blocks for a while, you may wish some visual assistance in seeing the various elements of the block. (This was illustrated in the examples above.) Pathagoras can help. Click 'Editing Tools' from the Pathagoras drop down menu. Select the "Editing Tools II" option box and click "Colorize." This will 'paint' the various brackets and braces in different colors so that you can more easily see and work with them.

Editing: Because all text is plain text, an <<*Options/Optional*>> text block can be inserted into any document you currently have in your system. Please also note that because of its plain text character, you do not have to have "Pathagoras" on your system in order to "Pathagorize" the document. The content of a document with plain text <<*Options/Optional*>> text blocks can be fully edited by anyone anywhere. This allows 'at home' editing and third party editing. This also allows the total transferability of content from Pathagoras applications to any other text based application.

Every clause within a library of clauses is 'optional.' That is because the end-user viewing and making selections from the 'Clause Selection Screen' decides whether to select a particular clause for inclusion or not.

But there are many situations where text within a selected clause may not be appropriate. Pathagoras offers the user the additional ability to reject it, or to select it or to select one or more choices among an array of options.

<<*Options/Optional*>> text blocks above provide additional power and flexibility to your document assembly system.

Tip: As you are designing your <<*Options/Optional*>> text blocks, you will want to test the action and integrity of your work. This, of course, can be done by assembling the document that contains the blocks you have created. The document assembly routine automatically activates all <<*Options/Optional*>> text blocks. However, you can trigger Pathagoras to act on a text block which is currently on your screen (or a copy of it, since you may not want to experiment with the original text) without going thru the entire document assembly process. Try this –activate the InstantDatabase (Alt-D) and press the Next>> on that screen (without filling in any of the fields). Same result.

The anatomy of an <<*Options*>> text block.

Options text setup is not without its potential complexities. Compared with the setup required by other programs, however, it is undeniably simpler. Because it is plain text, you don't have to fish around for the right field coding and switches. And when you actually see it 'broken down,' it makes even more sense to you. But precise placement of the various characters that make up the block for Pathagoras is mandatory. Without the right characters properly placed, Pathagoras will not be able to dissect and process the Options block. Not to worry too much, however. After the discussion of 'anatomy,' we will show you how to activate a screen which will automate the creation of <<*Options*/*Optional*>> blocks.

Simplest <<*Options*>> block (up to 5 choices separated by slashes:

<<*Options* I have one minor child./I have no children./I have __ minor children.>>

(Notes: Opening brackets—the red is only for emphasis; the word “options” surrounded by asterisks, and the options list separated by slashes. The text of the options will appear on a selection form during document assembly process. Don't forget the closing brackets.)

<<*Options*>> block with “Question (up to 5 choices and 5 ”

<<*Options*Is there one child?/ Are there no children?/Are there two or more children?* I have one minor child to whom I give, devise and bequeath the remainder of my estate./I have no children./I have [number of children] minor children to whom I give, devise and bequeath the remainder of my estate, in equal shares.>>

(Notes: The question — which need not actually be a question — is any text set out between the second and third asterisks. The questions will appear on the selection form during document assembly process.)

<<*Options*>> with groupings:

<<*Options*!Children! I have one minor child./I have no children./I have __ minor children.>>

<<*Options*!Children! I give the remainder of my estate to my child./I give the remainder of my estate to the following persons. /I give the remainder of my estate in equal shares to my children, *per stirpes*.>>

(Notes: The Group name (in this case “!Children!”) is set out between exclamation marks immediately after the second asterisk. Once a selection of the first group encountered has been made, all other options blocks with the same group name will be 'handled' in the same fashion.)

<<*Options*>> with groupings and questions:

<<*Options*!Children! Is there one child?/ Are there no children?/Are there two or more children?* I have one minor child./I have no children./I have __ minor children.>>

<<*Options*!Children! I give the remainder of my estate to my child./I give the remainder of my estate to the following persons. /I give the remainder of my estate in equal shares to my children, *per stirpes*.>>

(Notes: Once the first Options group is encountered and question answered, Pathagoras will automatically process the remaining blocks with the same group name. The selection is made using the same positions in the list, not the same answer.

<<*Options*!colors!red/yellow/burnt orange>> (text . . . text . . . text)
(text . . .text . . .text) <<*Options*!colors!yellow/purple/royal/blue>>

(Notes: If yellow was selected for the first option of the group (the second option), purple will be selected automatically when the next member of the group is selected. And, because the processing is done automatically, it is not necessary to repeat the question for subsequent members of the same group.)

Here is a **linear summary** of the <<*Options*>> block elements. Mandatory elements are noted in red:

<<

Options or ***Options(radio)***

!GroupName! (group names allow you to complete all members of the group with the same level selection made in the first member of the group.)

QuestionText/QuestionText/etc* (no opening '"', just a closing one. Either one question per option or one question, period.)

Option1/Option 2/Option Number 3/etc.

>>

(Use the '(radio)' suffix to Options if you want to restrict the user to just one of the listed choices. The default is to allow the user to select one or more of the up to five possible choices.)

Here is a **linear summary** of the <<*Optional*>> block elements. Mandatory elements are noted in red:

Optional

!GroupName! (group names allow you to complete all members of the group with the same level selection made in the first member of the group.)

QuestionText* (no opening '"', just a closing one

>>

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