



# THE PATHAGORAS SYSTEM

The Pathagoras  
One-Page Lessons

© 2018 Innovative Software Products of Virginia, LLC

**Document Assembly**  
**Document Automation**  
**Document Management**

**© 2018 Innovative Software Products of Virginia, LLC Innovative  
Software Products of Virginia, LLC**

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - for other than personal needs without the written permission of the publisher.

All references in this Manual to "Word" refer to Microsoft® Word, a product of the Microsoft® Corporation. All references to Windows refer to the Microsoft® Windows® operating system, a product of the Microsoft® Corporation.

Other products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: November 2018 in Yorktown, Virginia

# Table of Contents

<b>Part I Introduction</b>	<b>5</b>
<b>Part II Variables and Instant Database</b>	<b>6</b>
<b>Part III Document (Clause) Assembly</b>	<b>8</b>
<b>Part IV Conditional Text</b>	<b>10</b>
<b>Part V Interviews (Ask Tables)</b>	<b>11</b>
<b>Part VI HotKeys</b>	<b>12</b>
<b>Part VII Process</b>	<b>13</b>
<b>Part VIII DropDown Lists</b>	<b>14</b>
<b>Part IX Aliases</b>	<b>16</b>
<b>Part X Repeat Text</b>	<b>17</b>
<b>Part XI Excel Connections</b>	<b>18</b>
<b>Part XII Navigation Tools</b>	<b>19</b>
<b>Part XIII Things You Can Set</b>	<b>20</b>
<b>Part XIV Things You Can Do</b>	<b>21</b>
<b>Part XV FAQs</b>	<b>22</b>
<b>Part XVI Pathagoras Exclusives</b>	<b>23</b>
<b>Part XVII Miscellaneous</b>	<b>24</b>
<b>Part XVIII One Page Quick Start Guide</b>	<b>25</b>
<b>Part XIX Technical Support</b>	<b>25</b>
<b>Part XX Sample 'Pathagorized' Text</b>	<b>27</b>
<b>Part XXI Variables and Instant Database_2</b>	<b>28</b>

<b>Part XXII Conditional Text_2</b>	<b>31</b>
<b>Part XXIII Repeat Text2</b>	<b>34</b>
<b>Index</b>	<b>37</b>

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

We admit it. Our 850 page Manual is a bit long and unweildy for light weekend reading.

So we have developed a polar opposite Manual that we have dubbed "One Page Lessons." Each lesson on a major Pathagoras feature is edited down to a single page. (Some topics are augmented by a table showing real life examples -- a cheat-sheet as it were.)

Each lesson can be reviewed in a matter of minutes. While it won't necessarily convey what its big brother can (no pictures here), it should at least serve as a reminder as to the wide range of productivity tools and functions that are available. If you see one you want to explore further, the section of the main Manual is just a click away.

You can print out individual pages and pass them out to users who are just learning the program. Or use it like a study course for learning/re-learning the program.

Other resources: The [Pathagoras Manual](#) is the primary resource for the program. It is highly illustrated, indexed and detailed. It covers all program features. About 850 pages in length.

Companions to this publication (short and sweet) are the

- "[Beginners Guide to Pathagoras](#)",
- the '7-day Plan' (to a leaner, meaner document assembly system)
- No Set-up (the quickest way

Like this pamphlet, the above contain only bare bones 'start-up' information.

## Variables and the Instant Database

### Variables

A variable is a holding-spot for more personal information that will eventually replace it. Pathagoras uses plain-text characters, not field and links, to denote a variable.

**Simple variable:** Examples: [Client Name], [Company Address], etc. You choose the words. The default 'boundary markers' are square brackets.

**Multiple-choice Variables:** Choices within a variable are separated with slashes): [Arnie Attorney/Laurie Lawyer/Cary Counselor]

**Grouped Multiple-choice Variables:** The selection of a value in one member of the group changes all other values in same group). Any word between '!' marks denotes the group. Examples: [!spouse!husband/wife] [!spouse!he/she] [!spouse!him/her]

**Titled Variables:** You can advise the end-user what the variable refers to by adding a title. The 'colon' separates the title from the variable itself. [custodian:mother/father]

**Default value:** Insert a # before the choice you want to use as default value. [red/blue/#green/orange].

#### [Date] variables:

A single variable ([e.g., [Date of Contract] serves as base for all other variations. Just add a suffix to designate the 'part' of the date desired.

[Date of Contract] | [Date of Contract(ext)] [Date of Contract(day)] | [Date of Contract(month)] [Date of Contract(mon)] | [Date of Contract(year)] [Date of Contract(yr)]

[Today] or [-Today-] (the former preserves the value in a saved client record; the latter does not.

**Spell-out functions:** <s>, <ss>, <\$>, <\$\$> adjacent to a variable will signal Pathagoras to spell out the numerical value provided.

**Intelligent A [\*\*a/an]:** Place before a variable when the 'article' is not known. Eg., 'a Florida corporation' vs. an Ohio LLC. [88a/an] [\*State\*] [\*corp type\*]

### The Instant Database (IDB) Screen (Alt-D displays the IDB screen)

Click the 'Scan' button in lower left of IDB screen to initially scan for variables. For current record, click the dropdown in upper right of screen.

**[Date . . .] variables:** If the variable contains the word 'date' in any form, a green calendar button will appear in the space between the two columns. Click it and a calendar will appear.

**Equivalency function:** The value of a variable can be designated to equal a preceding variable. E.g., "[=Client Name]". Click the red toggle button that will appear between columns to apply the precedent variable.

### Double Click Actions

On variable side:

### Power Tools (the red button)

**Alphabetize:** primarily used to confirm existence or spelling of variables

**Edit; rearrange:** You can edit the mask and arrange your variables in a more logical order using tools found behind the Power Tools button.

**Masks:** the simplest of intake forms. You can save an collection of variables as a 'mask' for easy recall.

**Preset values**

**Hint and tips**

**Folders:**

A variable can be a folder call so you can select and insert an entire document in place of the variables.

**Math:** Simple math (+, -, /, x) up to four operands is possible. E.g., type '[Total]' as the variable and '[Quantity] x [Price] + [Shipping]' as the value. The three operand must be variables as well. Save in a mask.

**Date Math:** '[Due Date]' '[Today] + [30 days]'

**Delete unused variables:** Click the box labeled "Delete unused variables" to get rid of variables like [Address 2], etc. when not used. The extra lines or spaces are also removed.

**Variables DropDown List: A special DDL. Use it to quickly insert a variable in a document you are Pathagorizing. Insures consistent spelling.**

### Special Situations:

#### 'Natural slashes'

If your multiple choice variables must contain words like 'a/k/a' and 'and/or', use '/OR' as the divider. (But note, if you must use 'AND/OR' in a multiple choice group, you can surround the individual choices with quotation marks.)

Transfer bracketed variable over (but without brackets).  
Shift-double click transfers the brackets.)

**On value side:**

Toggle date from short to middle to long style

Toggle case from all caps to all lower case to upper/lower  
case

Adds additional variables when nested variables present.

## Document Assembly (Clause Assembly)

**Document Assembly** is the process of creating documents from a variety of text sources. The two most popular methods are 'by construction' (building a document from relevant building blocks of text) or 'de-construction' (starting with overbuilt content and removing non-relevant content. screen). Pathagoras can do both. This page focuses on document assembly by 'construction'. The 'by de-construction' method is discussed more fully in the 'Conditional Text' lesson.

**By 'Construction' (a/k/a 'Clause Assembly):** You will want to have a collection of clauses, terms, snippets, building blocks or whatever you want to call them. From a practical point of view, they are all Word documents. Nothing more and nothing less. The documents are stored in regular Word/Windows folders. Each folder that contains your building blocks is called a book and books can be displayed in larger and topically related containers called a library. More immediately below.

**Additional Assembly Options:** You can select various additional options (adding page or section breaks between selected clauses; creating 'document packages', etc.) via the button so labeled.

**Book:** A book is a simple Windows/Word folder. It contains the documents you will be calling upon to build other documents. While you always remain unrestricted in how you decide to set up Pathagoras, think of a book as the lowest level of category sub-division. In an Estate Planning practice, think Wills and 'Trusts' (or in the latter, perhaps it will be 'Single, Legacy, Crummey Trusts'. In a Family Law practice, think Adoptions, Divorce Pleadings, Separation Agreements, Discovery, Decrees and Orders, etc. It is important that you recognize that books are very fluid entities (just like folders – that's because they are folders. You can easily move stuff into and out of folders at will. The content of a book that you have assigned to that folder likewise will change just as fluidly.

**Library:** A 'library' is simply a collection of pointers to books of a similar nature. So the Estate Planning Library might contain Wills, Trusts, POAs, Advanced Directives, etc. A Family Law Library might contain pointers to the folders (books) that contain "Pleadings;, 'Discovery' Separation Agreements, Decrees and Orders, etc.

**Clauses in a book:** These are simple Word documents. Nothing more. Clauses contain building block text that are cobbled together to create a complete document or project for a client. There is absolutely no restriction on content. A clause can (and should) contain Variables (so it can be personalized for the client or customer) and Options and Optional text that allow you to pick and choose (or delete or keep) certain text blocks, depending upon answers to questions that you can compose on your own and pose to other users. Indeed, document can be an 'overbuilt' singular entity that contains all conditional text, variables and repeatable sections. This latter kid of document is typically called a 'template' and is a bit the 'opposite' of document assembly, but rather called 'template processing.' Regardless, Pathagoras can handle well either kind, and every conceivable combination and variation. (You can assemble multiple documents, and those individual

**Pointers:** Pathgoras merely points to things. That's why we say that Libraries point to the folders what contain the various clauses of a book. The library does not contain them. If you move the folder containing, let's say, your Will clauses, be sure to reposit the 'book' and the DropDown List to the proper location.

**Process:** Click Document Assembly button and select book. The current content of selected book (defined below) in left panel. Move desired clauses to the right panel. Rearrange as needed. Press Next. Selected clauses are instantly assembled into single document,

**Clause Selection Screen:** In a typical document assembly session you would press the Document Assembly button, select a library (Estate Planning, Family Law, etc) select a book (Pleadings). With those selections made, Pathagoras would quickly read the folder – remember a book is simply a folder) and display in the left column of the screen the names of every document in the folder. Choose the ones you want and move them into the right panel. Once you have onfirmed the selections (and the order), press the 'Next button and Pathagoras will cobble them together. At this point you have a perfect 'rough' or 'initial' draft.from

**Document Calls:** You can call any clause into an existing document by simply typing its name an pressing Alt-G. If the document is in the SuperFolder or in one of your DropDown Lists, Pathagoras will find it and insert it. If you want to save a Document Call in a source document, and have Pathagoras automatically insert the text of the referenced document during processing, enclose the document name within '<<' and '>>' markers.

**Clause Sets:** A Clause Set is a complete (or part of a complete) document composed solely of references to other documents. It is an extension of Document Cals above. Enclose a series of document names within '<<' and '>>' markers. Save the document in the appropriated book. When the clause set document is recalled, Pathagoras will locate each desired document and paste its content into the document currently being built. If the referenced document is in your Super Folder or one of your DropDown Lists, only the document name is needed. Otherwise, use the full name (with path) to identify the document.

**Margin Assembly:** If you use the Prefix/Suffix naming convention, list just the suffixes of the clauses you want down the left margin. Then, on the line immediately after the last suffix in the list, type the prefix, a 'dot' and the word 'list'. Then press Alt-G, (If you don't yet use the prefixes and suffixes, but want to try it, type down the left margin the following (a slash here means a new line): 100/120/140/160/300f/wil.list

**Automatic Paragraph numbering:** If individual building blocks contain automatic paragraph numbers, they will carry forward into the assembled document.



documents can contain hyper-complex options, optional and repeat blocks, which themselves call upon (and into the parent document) other clauses. The possibilities are endless. The fun is in the ability to compose what you want.

As your collection of clauses grows, so will your need to organize those clauses into categories. And even categories have their own sub-categories. This is where the 'Libraries and Books' motif adopted by Pathagoras comes into play.

## Conditional ('Options' and 'Optional') Text

(Options= multiple choices; Optional: 'keep it or delete it')

Adding conditional text blocks to your documents can make them infinitely more flexible. Whether building complex, multipage templates with dozens of choices, or just adding a single line of optional text, you should become familiar with how to create and use conditional text.

### Simple:

**Optional:** {text within curly braces}. When processed, Pathagoras will highlight the text and ask "Do you want to keep this?" Answer 'Yes' or 'No.'

**Options:** {Option 1/OROption 2/OROption 3}

Enclose text that you want to be "optional" (keep it or delete it) within {curly braces}. (See example above.)

To create 'Options' (multiple choices) separate the choices with '/OR' (only one selection possible) or '/ANDOR' (multiple selections possible). Up to 9 options are possible.

If you wish a response at the top of the document to be carried to other sections, insert a !groupname! just inside the opening curly brace.

### Example:

This document was signed by the {!Testator/Testatrix} as {!this/her} Last Will, and {!he/she} signed it in my presence.

(Note: As explained elsewhere, a !groupname! can be any letter, number, word or phrase, up to 39 characters, between ! markers.)

### Robust:

<<\*Optional\*!Group!Prompt\*Optional text>>

<<\*Options\*!Group!Prompt1/Prompt2\*Option Text 1/Option Text2>>

The entire block of text is opened with <<\*Options\* or <<\*Optional\* and closed with >>. Choices in 'options' block are separated with slashes. An unlimited number of options are possible. (But see 'Tables' below.)

An \*Alias\* can be called on to supply the multiple choices. E.g., <<\*Options\*\*States\*>> (the double apostrophe is correct. The first closes the administrative text, the second indicates the \*Alias\*

!groups! and prompts are optional. If used, you must close the administrative text with a '\*' so that Pathagoras knows where you 'substantive' text begins.

**'Document Calls'** The result of an option or optional choice does not just have to be text. It can be a reference to an entire document that will be called in if it's the result of the options/optional selection. E.g.

<<\*Options\*No children/One child/2+children\*<<0 children.docx/1 child.docx>>/2+ children.docx>>>>

### Debugging:

### Tables; rows as choices:

Pathagoras can process each row of a table as a choice, even without the slashes. The boundary markers must be outside of the table. Prompts are required.

<<\*Options\*President/CEO/VPO/Treasurer\*

President	[Name of President]	[Shares]
CEO	[Name of CEO]	[Shares]
V/P Ops	[Name V/P Ops]	[Shares]
Treasurer	[Name of Treasurer]	[Shares]

>>

**Aliases:** Any \*alias\* can be used in place of listing options choices. <<\*Options\*\*Attorney\*>>

### Miscellaneous:

Multiple related conditional blocks can be controlled with a single !group! name. When using groups to tie various conditional text blocks together, you do not need to repeat the prompts in a later group.

**Nesting:** Robust conditional blocks can be nested. Simple options and optionals cannot be nested.

**Administrative text.** Administrative text comprises the boundary markers, optional groupname, and the optional prompts. The opening Administrative text must be closed with an '\*' (astersisk) so Pathagoras knows where it ends.

**Automatic paragraph numbering,** if used, remains intact. Lines and spaces are closed up.

**Processing** of Options and Optional text blocks occurs 'top to bottom, and outside - in (if nested). Robust blocks are processed before Simple.

If you want to discard the primary text, yet want some text to remain in the document, use the /NEGOPT flag. E.g., {I appoint [Guardian] as Guardian./NEGOPT I have no minor children.} (Same result would occur with a two-option block). Most useful when optional blocks grouped, and second or third member of group

**/OR** should be used as choice separator when the 'nomal text' contains slashes. E.g., 'and/or', 'A/K/A', d/b/a, etc..

### AskTables (Interviews):

All Options/Optional/Repeat text blocks can be presented at the top of the document in a table with an Ask prefix, a groupname and prompts (the 'administrative text'). When the document is processed, Pathagoras reads the Table and presents all questions at one time (instead of one at a time). <<\*If\* . . .>> logic can be added to allow cascading questions.

**Structure Checker:** Pathagoras provides an automated routine that identifies the most common structural mistakes in your documents. Structure Checker. Block Checker.

**Painting:** Make your makers pop by painting them. (This helps in seeing your boundary markers, group names and prompts. Helps in debugging.

### Interviews (Ask Tables)

Pathagoras offers plain text, no fields, interviews.

They structure is practically identical to setups used for <<\*Options and <<\*Optional blocks in the body of the document, except for the addition of the word Ask (which is Pathagoras' 'code' for 'interview.'

Because the ask table merely asks the question, but otherwise does nothing substantive within the table, you must have a way to tied the answer to text in the document body. And just like everything else, the device is a !groupname!. So in the body,you might have <<\*Options\*!ice cream!\*Chocolate is my favorite flavor./Vanilla is the very best./Strawberry beats them all.>>, the interview would be this: <<\*AskOptions\*!ice cream!Chocolate/Vanilla/Strawberry\*>>. Note: everything about an interview ('ask') is 'administrative' and the star following the equation makes that clear.

<<If>>

<<Compare>>

**Automatic creation of Interviews.**

## HotKeys

Pathagoras offers plain text, no fields, interviews.

As do most programs, Pathagoras offers hotkeys and other shortcuts to access its most prominent features.

**<Alt-D>** for 'd'atabase is the first (and for some the only) hotkey you will use. It calls up the Instant Database screen. Press the 'Scan' button and any [bracketed variables] are identified and placed onto the screen. If you previously saved a record

**<Alt-P>**: If your document contains conditional (options and optional text blocks, you would typically press this key combination first. (If you have called a document from a DropDown List or Document Assembly screen, this 'processing' function occurs automatically. Processing should occur first in any event so that you have a great rough draft (void of all inappropriate text sections in the template) before you begin to personalize it with <Alt-D>.

**<Alt-O>** activates the Create Options routine. Instead of you having to remember the coding sequence to create Options, just follow this 'wizard,' provide the values you want to use, and all the setups will be done for you. The only thing you need to do ahead of time is to place slashes between each section you want to be an option and then highlight the entire block of text.

**<Alt-G>** for 'g'et is the most versatile, among them being 'last' to recall the last 'Pathagoras significant' item; 'mru' for the most recently used item store by Word; a 'quicklink' name to open the folder you have associated with the quickline (such as 'clients' for your 'Cients folder'.

There are in fact over 40 items you can 'get'. To get a complete listing, type 'altg' (no quotes) the editing screen and press (duh) <Alt-G>. Peruse the list and give what interest you a shot.

**Reassigning HotKeys:** Every once in a while a HotKey will be assigned by another program to a Pathagoras hotkey. Which one takes precedence is dependent upon the order in which the program loads. If you need to reassign a hotkey, click Pathagoras Features (top half) | All Settings | HotKeys.

**Mouse instead of Hotkey:** You can always mouse-and-click to any feature that can be called with a HotKey. For example, you can call the Instant Database <Alt-D> by clicking Pathagoras Features (bottom half) | Instant Database Tools | Display IDB Screen. But if your primary desire is to mouse-and-click, you should elevate the 'Display IDB Screen button' to your QAT (Quick Access Toolbar). That way its only a mouseclick away. Your hand doesn't have to leave the mouse and you don't have to enter into the Pathagoras tab. (To place any item on the QAT, navigate to it, right click and select the "Add to QAT"

## The Pathagoras Process

Understanding the process and philosophy behind a program will offer information and insights into how the program can be used to maximize efficiencies in the office. If you know how it runs, you can put the tools in the most efficient manner. We really didn't come up with the 3P mnemonic, but Pathagoras really does break down neatly into these categories

Preparation (or Pathagorizing) your documents

Add [bracketed] variables and conditional text blocks to your documents as discussed in other One Page Lessons.

Decide how you want to build your documents. Do you prefer to build from the ground up, essentially starting from a blank page and pour clauses onto the canvas. Or do you prefer starting from an overbuilt 'template' that is fully formatted but has text within its very large 4 corners that would cover every scenario. Deleting the extraneous text via an interview (married? # of children? etc.) shrinks the template down to a good rough draft.

With Pathagoras, it's not all one or the other. Interviews are entirely common for users who build a block at a time. Adding text to a template that happened not to include the one clause you needed is a piece of cake with Pathagoras. It's the general technique that must be decided upon, and where on the scale building block -- template scale you want to start. (Trust us, it's easy to slide up and down the scale as you begin to build your system. Pathagoras is exceptionally fluid in what you can do, and very flexible and adaptable. It doesn't care if you change course at any time, and makes any course change easy to implement.

**Processing:** Once you have a collection of documents, you need to understand the two actions that are occurring during the creation of a document using automation. The document is constructed (or de-constructed) based on your choices and the command that you have built into the document. (With Pathagoras, you actually can see the program perform this routine. The 'flashing' of the screen is simply Pathagoras highlighting text, removing boundary markers (if text is being kept) or removing whole blocks of text if deemed irrelevant), adding text in response to <<document calls>> or <<\*Repeat\* . . . >> commands, etc. The almost final product should be a perfect rough draft of the document, waiting for it to be personalized. (Of course, if some text is missing due to a selection error, or because the template just didn't contain that clause, Pathagoras makes it exceptionally easy to fill in the gaps. That's the main reason we developed these two tools: DropDown Lists and <Alt-G> calls.)

**Personalizing:** Once you have your document on screen, it likely has some (or a lot of) bracketed [variables]

## DropDown Lists

### DropDown Lists (DDLs)

**Definition:** Always on, always available list of documents, templates, images or other files.

#### Creating:

If you have none, click the DropDown List icon in the Pathagoras toolbar and follow the prompts. If you have one or more, click the 'Add New DDL' button. (You can also click the 'Create DDL' element in the Pathagoras Features list to create a DropDown List.) Whichever way you have used, navigate to inside the folder that contains the files you want displayed in the list. Select a single file in the folder (it doesn't matter which one) and click OK to lock in the folder. Pathagoras quickly reads the content of the folder and creates the list. It appears in the DropDown List section of the Pathagoras toolbar.

**Using:** As the name implies, it's a drop down list just like any other similar list in Word. Click the down arrow to the right of the list name. Then click on an item in the list. Pathagoras will instantly place an exact duplicate of the selected file into your document.

**Alt-G recall:** In addition to 'point and click' recall, you can type the name of a file that is reflected in any of your DropDown Lists anywhere on any editing screen. Press Alt-G (for 'g'et). Pathagoras will almost instantly find the document and insert it in place of the name.

Note that a copy, not the original, is what is placed onto the screen. Access to the original is easy, however, Three options: (1) Click 'Open Document' in the button array and then select the document from the DDL. (2) Click the Open Folder element at the foot of the specific DDL and then select the document. (3) If the document you want to edit is the last one you called, type 'Last' to the editing screen and press <Alt-G>.

**NewDoc/Insert Toggle:** The status of the button lets you know what will happen when you select an item via point and click. If you want a brand new document, make sure the toggle shows 'New Doc'. Otherwise, the item will be placed at the insertion point.

#### Reassign/Rename/Delete a List

- (1) Click the 'Other Settings & Actions' element in the List's footer. Select 'Rename/Replace'. Follow prompts to replace.
- (2) You can also just create a new list and when asked where to place it, select an existing list. The original will be overwritten.

#### Other Settings and Tools:

From the Other Settings & Actions' element at the bottom of each DDL, you can set: (1) tell Pathagoras to return the cursor to top of document after inserting term. (2) always insert or always NewDoc (3) show 'Subject' or 'Name' of clauses by default. Other useful settings are also available.

**Quicker Access:** Clicking on the Pathagoras tab and then a DropDown List can be tedious. If you use a particular DDL frequently, consider elevating it to your QAT. (It's just right click and then 'Add to QAT.'

### Document Disassembly/Save Snippets

This is a 'must-know' tool for real document assembly-philes. It's the quickest way to build your libraries of clauses, snippets, signature blockes etc. Simple highlight a block of text. DropDown a List into which you wish to add the highlighted text. Select the 'Save Text to Folder' element at the foot of the selected list. When prompted, provide a name.

#### Collections

While 10 is the maximum number of DDL you can display at one time, you really can have 40 DDLs at the ready. Click the more options button in the lower right corner of the Collections section (the small south-east pointing arrow) and Save the current collection or Recall and previously saved collection. The switch typically takes less than a second.

#### Environments

A collection load a group of DDLs, but an environment is a complete setup. Not only is the collection replaced, but the document assembly Library is as well. The 'trick' is just insuring that the name of the Collection and the name of the Library are identical.

**Building a Clause Set:** A third toggle (that you can activate via the DDL menu and click the 'Add Doc Name Toggle'. Then, with that toggle selected, when you click a document, only the name of the document, surrounded by << and >> markers is inserted. (Be sure to save this clause set out as a document. So you can build an entire document

#### Refresh

If you know you added something to the folder, but it's not showing up in the DDL, just click the 'Refresh' button at the foot of each list.

#### Hints & Tips on maximizing DDL function:

When naming (or renaming) a file, keep it meaningful, memorable, and as short as reasonable possible. That way, if you want to recall the document using the Alt-G function, you can more easily type its name.

The typical use of a DDL is the recall of a single element in the list. You can, however, create a 'multi-select' window by clicking the Other Settings element and then the blue "Clause Selection Screen." (Actually, this is the same as the Document Assembly process, just attached to DDLs)

**Content of DDLs:** Any file can be referenced in a DDL. Documents are the most common, but you can also display spreadsheets, PDF files, WordPerfect documents, images (PI lawyers or illustrated book writers take note).

**Specialty Lists:** Found under Pathagoras Features | DropDown Lists. You can display a list of [Variables] to make it easier to Pathagorize your documents. You can create a list of Pathagoras examples via the 'Samples' option.



## \*Aliases\*

(Single words or phrases representing longer lists of items)

**Definition:** Like its dictionary definition, an 'alias' is a term that stands for something else. In Pathagoras world, an alias is a word or short phrase that refers to a long lists of items stored in an Excel spreadsheet.

When you initially are conceiving of what is this application, think \*States\*. Instead of you typing into a document a multiple choice list of the 50 United States separated by slashes: [Alabama/Alaska/Arkansas . . ./Wyoming], you would save that list in an Excel spreadsheet under the column head 'States'. In your document, you would just type [\*States\*] in place of the long list. (Indeed, \*States\* and its complement \*Capitals\* are part of the initial Pathagoras install. Using them, and the examples below, you can get a feel of the power and utility of Aliases.)

Any word or phrase (up to 39 characters) can be an alias. You can have an unlimited number of aliases, and each alias can have an unlimited number of choices which it represents.

The content of the list (and alias name) can be anything. Typically, aliases reflect names, addresses product names, descriptions, numbers. If you can put it into an Excel spreadsheet, it can be referenced by an alias. Pathagoras can feed the list automatically, or you can create a list or edit and existing list manually.

The name of the Excel spreadsheet that contains your \*Aliases\* is called 'Multichoice.xlsx'. It is stored in the same folder as are your instant Database records (typically C:\program files (x86)\Pathagoras\IDBs, but if you moved the folder for networking and sharing purposes, it will be in that new folder). It comes 'pre-populated' with the States and Capitals

Aliases can be used with both Variables [\*States\*] and any kind of Conditional text. { \*States\* }, <<\*Options\*!st!\*States\*>>. (Notice the double star in the last example. The first star closes the administrative text. The second star introduces the alias term.)

Aliases can be !grouped!. Indeed, the power of aliaas becomes most apparent when you group. E.g,

[!atty!\*Attorney Name\*]

[!atty!\*Attorney Bar number\*]

[!atty!\*Attorney Email\*]

!atty!\*Attorney Phone\*]

[!atty!\*Attorney Address\*]

### Creating:

*From scratch:* Type a variable containing an alias that does not exist and scan the document. When the alias is encountered (and Pathagoras cannot 'find' it), Pathagoras will ask you to provide the choices. Add all or some (you can add the rest later). When you press 'OK,' Pathagoras will save your list in the Excel spreadsheet under the proper column title that it creates

*Directly into Multichoice.xlsx:* Open up the spreadsheet and type (or cut and paste) away. It really is as simple as that. (The word or phrase in row 1 is the 'alias'. The words or phrases beneath are the choices.)

*From prepared lists in Word:* Type a list of choices. The list can be a column of choices in a single Word table, or it can be a string of choices separated by slashes. Highlight the list. Display the Alias menu and select the Tools tab. Select the 'Add prepared list' and then Go. Provide an alias name. All done.

*From a Table:* You can create a two column table, column 1 containing alias names and column two, lists that the alias represents, each choice separated by slashes. Display the Alias menu and select the Tools tab. Select the 'Add prepared list' and then Go. Provide an alias name. All done.

### Editing:

The more formal way to access the multichoice.xlsx file is via 'PathagorasFeatures |Editing Tools |\*Aliases\*'. Click the green button that says Edit. The easiest way, however, is simply to type 'alias' onto an editing screen and press <Alt-G>.

**DropDown Lists:** In addition to using 'Aliases' in [\*variables\*] and <<\*Options\* . . .>> blocks, you can place the choices of any alias list into a DropDown List. Just create a DropDown List and select 'Alias List' as the content under the 'Other' choices. Once created, you can then 'point and click' in any term in the DDL just like any other term.



## Repeat Text

The 'Repeat' command tells Pathagoras to duplicate a designated block of text 'X' number of times. Repeatable text can be anything: a word, a sentence, a table, paragraphs of text, etc. Use it anytime the number of actors may vary from document to document.

**Examples:** Enclose any text within the <<\*Repeat\* . . . >> boundary marks. <<\*Repeat\*Row>> your boat. When prompted, press '3' to get 'Row row row your boat.'

**Incrementing Variables:** If a variable resides within the Repeat block, that variable will be duplicated and incremented to create a distinct variable for each actor.

<<\*Repeat\*[Shareholder]>>, when processed, becomes [Shareholder@1], [Shareholder@2], [Shareholder@3], etc.

### 'Prose' arguments:

You can make your repeats read in a more 'prose-like' fashion (telling Pathagoras to add punctuation between the repeating text, instead of just a raw repetition) by adding 'arguments' following the repeat command. E.g., to put commas and the final 'and' between the incrementing values, add the '(and)' argument: <<\*Repeat(and)\*[Child Name], [Child DOB]>>

To insert a semi-colon separator between the incrementing values plus the final 'and': <<\*Repeat(and;)\*[Child Name], [Child DOB]>>

My children's names are <<\*Repeat(and;)\*[Child Name], [Child DOB]>>. If 3 children, the replacement will read: My children's names are [Child Name@1], [Child DOB@1]; [Child Name@2], [Child DOB@2]; and [Child Name@3], [Child DOB@3].

Here are the possible arguments: (and) (and,) (and;) (or) (or,) (or;).

**!Groups!** Repeats can be tied to other repeats via a !groupname!. So 3 selected for number of stakeholders at the top of the document can be tied to 3 address blocks or 3 signature blocks at the end of the document.

<<\*Repeat\*!stkhldr![Stakeholder]

>> at top can automatically relate to this at bottom:

<<\*Repeat\*!stkhldr!\* [Stakeholder Name]

\_\_\_\_\_ (Seal)

>>

### Other arguments:

<<\*Repeat(return)\*. . .>> places the actual number associated with the return request. Typically used in conjunction with a !groupname!

I have <<\*Repeat(return)\*!cdn!\* children>> children, namely <<\*Repeat(and;)\*!cdn!\*[Child Name], [Child DOB]>>.

Adding a comma and a number, e.g., '(return,1)' or '(return,three)', to the return argument lets you set a default style (Arabic numeral or spelled out and a default display value for the repeat)

### Repeat command and Tables:

You can surround an entire table with a Repeat command; you can repeat text blocks within a cell in a table. But you cannot provide a repeat command that begins in one cell and ends in another cell or ends outside of the table.

### 'Cumulative' alternative to repeat command

Some users prefer to lay out all of the possible variables within the document and use the Cumulative command to give a similar result. Cumulative requires an 'over-listing' of the choices (up to the maximum expected). When processed you select the maximum number needed (e.g., number of children).

Pathagoras keeps the choices at that level and below, and deletes all above that level. (By contract, <<\*Repeat\* . . .>> just requires the first element, which will be duplicated as requested.

### Other tools:

You can tell Pathagoras where to place the incrementing value. By default it's at the end, but if you place an '@' elsewhere in the document, Pathagoras will use that location. Here is the above rewritten in a way that might make it a bit more readable.:

My children's names are <<\*Repeat(and;)\*[Child@ Name], [Child@ DOB]>>. If 3 children, the replacement will read: My children's names are [Child@1 Name], [Child@1 DOB]; [Child@2 Name], [Child@2 DOB]; and [Child@3 Name], [Child@3 DOB].

**'Don't increment this variable' character:** To prevent a variable within a repeat block (e.g., [Date of Signature] from incrementing, put the 'don't increment character, \_ by default as the last character before the closing bracket. [Date\_]

**Notes:** Pathagoras processes Repeat commands after<<\*Options and <<Optional blocks. Use <<\*AskRepeat\* (along with other <<\*Ask\* commands) at the documents top (Ask table) to precisely set the desired processing order.)

## Excel Connections

Excel spreadsheets can play numerous roles in the document assembly process, and Pathagoras takes full advantage of Excel's capabilities:

### Excel as a Data Source

Pathagoras can 'scrape' data from Excel spreadsheets in a variety of ways.

**'Plain text'** If you have a simple 2 row or two column setup, with the first row (or column) containing variables that match those in your document, and the second row (or column) contains personal values,

**'Named cells'** A more sophisticated use, Pathagoras can scrape data contained in named cells. The beauty of named cells is that you can create those attractive, fancy spreadsheets, send it to a client for completion. Upon return, Pathagoras can scrape the client provided data into your Instant Database where it can be blended with other important data regarding the case or project. The 'name' assigned to a cell would, of course, match the Pathagoras variable used in your documents.)

To scrape the spreadsheet, click the red Power Tools button and then click 'Import Data.' Select the appropriate choice (plain or 'fancy,' and, following the prompts, navigate to and select the desired spreadsheet. Pathagoras does the rest.

### DropDown Lists

You can assign a folder of Excel spreadsheets to a DropDown list. Once assigned, you can then import an entire spreadsheet into your document. (Obviously these would be 'small' ones.) But you can also assign named sections of a spreadsheet to a DropDown and import just sections.

If you assign a single spreadsheet to a DropDown List, you would be able to insert the content of named areas (individual cells or named ranges). To create the connection to a spreadsheet (or folder of spreadsheets), use normal DropDown List creation tools and select the 'Folder containing Excel files' or Spreadsheet option on second page. (The Excel option on the first page is 'Excel as text source discussed below.) When you click on the DropDown List that was generated by the above, you will be presented a menu of choices as to what you want to import. Make the appropriate selection.

### Mail Merge

Excel is known for its mail merge capabilities. But setting up the merge letters in Word can be complicated or confusing. And the 'classic' setup requires constant connection of the document to the data source.

Pathagoras goes it one better. You can create a merge document using plain text '[variables]'. Pathagoras

#### **'Get value' command:**

You can ask Pathagoras to 'get' a certain value from an Excel file and assign it to a groupname. Once assigned, use the group value to handle other <<\*Options and <<\*Optional . . . >> processes.

<<\*Get\*!groupname!file.xlsx>> (groupname and specified spreadsheet)

<<\*Get\*!groupname,!\*. \*>> (groupname and unspecified spreadsheet. You will be prompted to navigate to spreadsheet)

**Get multiple values with single call:** List the target names as part of a 'long' groupname, separated by commas. E.g.

<<\*Get\*!DecedentName,DecedentCity,PRName!jones probate.xlsx>>

[IDB](#) (display entire collection of Excel files)

#### **Excel as aText source** [Excel Assembly](#)

Most of the previous discussion focused on drawing data from various cells in a spreadsheet. But you can store real document content (paragraphs of text) in a spreadsheet and assemble that text in the same fashion as assembling text from documents. You can create a book in a library or a DropDown List of content

An Excel spreadsheet can be used as a text source. It is used in the

### **Exporting from Pathagoras to Excel**

You can easily export data from an Instant Database record into an Excel file so that you can share that data with other program that can read from Excel. Simple display the IDB record, click the red 'Power Tool' button and click the 'Export' button. You export can be in either two columns or two rows, with the first row or column containing the variable names and the second row (or column) the values.

## Pathagoras Navigation Tools

**Getting from where you are to the folder in which you want to be can be frustrating and painfully slow.**

**Pathagoras offers many tools that, once mastered, will speed up your day by minimizing the task of navigating up and down folder trees**

**Prefix<alt-g>** Let's say you have edit a document and save it. You now need to recall it for further editing. Just type 'last'<Alt-G> and it instantly reappears. Or, more Pathagoras related, if you call for a document in a DropDown List, and note in the recalled copy a typo or other error that you want to fix. Type Last <Alt-G> and the *original* of the document is called for editing.

**'Instant Database':** While normally a straight 'data' tool, you can assign a folder as the value of a variable. This assignment displays the name of the folder in the 'value' column and a dropdown down which, when clicked, displays all the items in the folder. Select a document to be inserted. (Think a property description stored as a document in the folder.) One of the choices is 'Navigate', which allows you to move outside of the designated folder to find the desired document. So you can easily set the value to a parent 'Clients' folder and then quickly grab a document from a specific sub-folder of the parent..

**PathSmart/SaveSmart:** These are the ultimate navigation tools, but rarely used by most Pathagoras customers. Assign any folder (it doesn't have to be just a forms folder or client storage, although those are classic. Perhaps you have personal folders – volunteer work; family letters; anything. Assign them to a 'SmartPath' recall them via PathSmart visual tools or simply by the number in the profile you have created. Quickly save documents, again with no navigation, the same way.

**Libraries & Books screen:** When you display the Document Assembly | Libraries & Books screen, and select a deired book, the screen expands with additional options. Look for the 'Open Folder' choice to be quickly taken to inside the folder of where

**DropDown Lists:** At the foot of every DropDown List is an 'Open Folder' element. Use it to get to an original documnt in the folder, or to start navigating by using the DDL as a shortcut to get to your destination.

**QuickLinks:** Pair a folder with a name (any name you choose) to create a 'QuickLink'. From then on, just type the QuickLink name and press Alt-G. So, go ahead and assign the folder where you keep your clients' final product to the name 'Clients'. Then when you need to quickly get to the main folder, type 'client'<Alt-G>. If you want to get to a specific client's folder (let's say it's Don Johnsons) type 'clients/johnson, don'<Alt-G>. Quit navigating. This is an amazing tool

**Additional tools':** Look for the small arrow at the lower right of the left-most block of Pathagoras tools. Click it. A collection of tools is presented that will make your navigation trips. One choice is 'Open folder of underlying document.' Another is 'Copy file name' or 'Copy file folder' to clipboard. With in in your clipboard, future navigation is a piece of cake.

**Last<alt-g>:** This hotkey will display the last document that Pathagoras worked with, but with a slight variation. Remember that recalling a clause from the DropDown List brings up a copy of the target document. But Pathagoras has recorded the actual target as the 'last item used.' Therefore, when you type 'last<alt-g>', the actual target will be called up. Great for editing the original document when you noticed a typo (or Pathagoras reported a structure error.)

**mru<Alt-G>:** Recall for editing the document that Word has saved as the 'most recently used' document.

Pathagoras is infinitely configurable. Here are just a few items you can set:

Value ('default')	Use	How to change
Variables markers ('[' and ']')	Change the boundary markers which identify your variables	Alt-D   Power Tools   More Tools
Simple Options markers ('{' and '}')	To identify simple options blocks	Settings   Options/Optional
Width of IDB screen	Show full names of variables when initial screen is too narrow	Alt-D   Power Tools   Screen Sizer
Width of IDB drop downs	Show full names of IDB records when initial drop down is too narrow	Alt-D   Power Tools   More Tools   Custom
Maximum width of variables w/out warning (40 characters)	Increase size of 'maximum characters' to be recognized as variable	Alt-D   Power Tools   More Tools   Other
A 'QuickLink'	type a word, press Alt-G and a designated folder instantly opens	
A 'Super Folder'.	Designate additional 'hunt path' element. Any document in the SuperFolder can be called by typing the documents name followed by Alt-G	Settings   All Settings   File Location
DropDown Lists	Designate a folder to display in Pathagoras toolbar. Click to instantly insert external document into document you are creating.	
A 'Quick Pick'	Assign frequently used command to one of up to 16 Quick Picks. Alt-Q shows current collection.	
DropDown List Collections	While 10 is the max # of DDLs, you can have 4 'collections' of DDLs, expanding the available DDLs to 40.	The 'SE' pointing arrow in the DropDown List section of the Pathagoras toolbar.
Display (or suppress) highlighting, fields, etc.		Settings   Initial Displays

Pathagoras is infinitely configurable. Here are a few things you can do with no programming:

Value ('default')	Use	How to do it.
Open folder of current document	To view potentially related documents that reside in the same (or nearby) folder as the document you are working. No need to re-navigate up and down folder tree to see these items.	
Delete current document	A handy clean-up tool. If you don't want to keep a document that you have opened on the screen, delete it directly. (Word's process is to close the document, try to find it on your own -- sometimes hard to do, and delete it manually.)	
Recall any document by just typing its name + Alt-G	If the document called resides in your SuperFolder or in any DropDown List, Pathagoras will find it and insert it.	
Begin a GoToMeeting session with Pathagoras support	Type Meeting + <Alt-G>	
Automatically create Options and Optional blocks.	You don't need to memorize the coding for more complex options and optional text blocks. Let Pathagoras do the coding for you.	Place slashes between your choices (options blocks). Then highlight entire block. Press <Alt-O>. Answer a few prompts and Pathagoras creates the proper administrative text.
Create DropDown List of Variables	Once you have a list of variables you want to use, transfer them into a DropDown List. Point and click them in as desired.	Alt-D, PowerTools, Transfer, Variables DropDown
Keep lists of things and reference them via an *Alias*	Keep lists of attorney names, bar numbers; addresses; anything. Use in variables or Options blocks. Using !groupnames!, you can call the proper address with the designated name.	Pathagoras Features   Editing Tools   *Aliases*   Edit. Add, edit, delete, rearrange. Save and done
Insert any document anywhere with a 'document call'.	Build external text into a document so that the text is automatically placed into the document when it is processed. Letterhead, signature blocks and things that appear in many document that would be a pain to change in each document if a staff, name, address, etc. change were to occur.	Simply type the name of a document between '<<' and '>>' markers. If the document resided in your DropDown List, just the short name is all that is required.
Text Expander	Pathagoras is a text expander, but unlike others on the market, Pathagoras calls in Word documents that can be easily edited. There is no separate database you need to maintain. Simply type the name of a document and press <Alt-G>.	
Move any item to QAT	If you frequently use an item (an item in any menu, the DropDown menu or even any individual DropDown List	

## One Page FAQs

### Where should I save my documents?

Anywhere you want. Pathagoras points to what you have, as opposed to other programs which demand that you follow their rules. That said, you should save documents in a reasonable organized fashion. Don't mix client files with form documents; keep files of similar subject together, and files of disparate subjects in different folders. If you have multiple licenses, make sure your files are in folders that all users can reach (network server, Dropbox, OneDrive, etc., not your C:\ drive).

### What is difference between Document Assembly button and a DropDown List?

Not a whole lot. Both can point to the same folder. But DA is used when you want to assemble multiple items at a single selection time ('building block' assembly). DDLs assume you want to select a single item

**Can I share settings and records with others in my work group?** Yes. To share your Instant Database records, first move them to a location where everyone can access them. Then press Alt-D, right click on the current path to your records (it's at the bottom of the screen) and repoint. Repeat on everyone's computer. To share DropDown Lists and Library settings, follow the steps outlined at this link to 'mirror' your computers.

### Where are Instant Database records stored?

Initially at c:\proram files (x86)\Pathagoras\IDBs. But you can move the anywhere. Press Alt-D to display the IDB screen. At the bottom is the current location. Right click to move it. If sharing data, place in a location that all users can reach.

**Is it dangerous to press a button when I don't know exactly what it's for.** Absolutely not. Don't e afraid of pressing buttons. Our plain text setups make recovery from any accidental, unwanted, change very easy. If you don't like the result, press Alt-Z to undo the previous step(s). So, we absolutely encourage random buton pressing.

## Pathagoras 'Cool' Exclusives

**Pathagoras can do all of the 'standard' stuff the big guys can. In addition, we claim these exclusives:**

**Instant recall of clauses** (including whole documents): Pathagoras 'leans to' clause assembly, and focuses on instant recall of documents wherever they may be stored. To recall a document, just type its name followed by Alt-G. If the document is found in your 'Super Folder' (or sub-folder), the 'last used' folder, or in any one of your up to 10 DropDown Lists, Pathagoras will find it and insert it. (Programs that concentrate on 'template assembly' cannot function in this fashion.)

**QuickLinks:** Pair a folder with a name (any name you choose) to create a 'QuickLink'. From then on, just type the QuickLink name and press Alt-G. So, go ahead and assign the folder where you keep your clients' final product to the name 'Clients'. Then when you need to quickly get to the main folder, type 'client' <Alt-G>. If you want to get to a specific client's folder (let's say it's Don Johnsons) type 'clients/johnson, don' <Alt-G>. Quit navigating. This is an amazing tool.

**Last<alt-g>** Let's say you have edit a document and save it. You now need to recall it for further editing. Just type 'last' <Alt-G> and it instantly reappears. Or, more Pathagoras related, if you call for a document in a DropDown List, and note in the recalled copy a typo or other error that you want to fix. Type Last <Alt-G> and the *original* of the document is called for editing.

**Names & Subject Editor:** Change the Names and/or Subjects of all the documents in a folder. Use to conform names to an office standard, to add alpha-numeric sorting prefixes, to implment Pathagoras prefix/suffix naming style.

**\*Alias\* reference:** A very easy, very intuitive way to create, edit and recall any list of items. Attorney Names; Attorney Bar Numbers; Jurisdctions; Clerk of Court names; addresses; Product lines and specs; anything. Keep a list of these things in Excel. Pathagoras can quickly read the lists and present them as selectable choices during document assembly.

### **Plain-text Mail Merge**

Assembly (Options) using a table's rows as choices.

**DropDown Lists:** Always on, always active lists of the content of any folder of your choosing. Quick iinsert text by (1) point and click or (2) type the name of any element of any list and press Alt-G to 'g'et the item. Documents, Excel, Word Perfect(tm) documents, images. Anything Word can do, DropDown Lists can do better.

**Navigation tools:** Easily open the folder of underlying document (you no longer have to 're-navigate' just to get to the folder of the current document); easily copy file name or the path to clipboard (great when you have to change applications -- perhaps to Excel -- but want to preserve this information; easily delete the open document.

**Widest variety of Intake forms:** Once you have settled on your collection of variables, Pathagoras can automatically create a 'fancy' intake form that you can mail to your clients or customers for completion. OR you can create a fancy intake form using Excel and Pathagoras can scrape the data from that form. OR you can create (or use existing) PDFs for input forms and scrape the data from the face of the form.

**Scrape Acrobat Forms for data input; Complete Acrobat forms with IDB data.**

### **Excel Assembly**

Store clauses in separate cells in Excel (or any other spreadsheet you can import into Excel). Assemble clauses into complete documents.

**Assembly By Color:** Keep the red and blue paragraphs; discard the green and violet ones. No other program has the capability to allow you to mark up and then process text in this simple but very effective fashion.

**Variables = 'documents'; Variable = 'folder':** A variable can be assigned to an entire document (or to multiple choices of documents.) A variable can be assigned to a folder. Click on the variable in the Instant Database screen and the folder appears.

**Document Assembly Environments:** Easily create various 'environment' for most efficient assembly and automation. E.g., an Estate Planning environment; a Business Law environment; a Family Law environment. Keep the most relevant documents at the fore-front. Switch between environments with a single click.

Adobe Scraping / Adobe Filling

## Miscellaneous Tools and Features

### Intake Forms

Let your clients, patients or customers provide as much data as possible. Create intake forms using Excel, Acrobat pdf files, Word documents.

**Instant Intake forms:** Once you have a standard list of variables, tell Pathagoras to create an Intake Form. It's quick and automatically.

### Navigation:

#### Open folder of current doc

We all occasionally need to get other documents from the same folder as the current document. Sometime we just want to delete underlying document. For these and other routines, Click the 'other menu' button in the lower right corner and select the appropriate entry.:Alt-G tools

**Open DDL folder.** At the foot of each DropDown List is an entry that will open the folder to which the DDL points.

**Alt-G calls.** Press Alt-G next to certain keyword result in helpful actions. E.g.

Last (alt-g) displays the last document called via Pathagoras. Great for editing when you see and error.

Meeting (alt-g) starts a scheduled GoToMeeting session with Pathagoras support.

For a full list of calls, type altG followed by Alt-G keys.

**Quick Access Toolbar.** Any item in the Pathagoras toolbar or drop down listing can be elevated to the Quick Access Toolbar, and we recommend that you take advantage. Just right click on an item and pick the 'Add to Quick Access Toolbar' choice.

### Adobe Acrobat scraping and completing

**PLoader:** If you open and close Word several times during the day and have a slow computer, consider this tool.

### Names and Subjects Editor

**Painting Variables:** Plain text colding does have the drawback of being 'plain text'. But you can make the brackets, slashes and other Pathagoras markers 'pop' with color.

**Structure Checker:** The more you add Pathagoras features to your document, the more you will need the handy 'Structure Checker,' which scans the document for balance of command boundaries and for the correct structure of your Options/Optional and Repeat blocks)

**QuickLinks:** Pair a folder with a name (any name you choose) to create a 'QuickLink'. From then on, just type the QuickLink name (plus subfolder, if you want to dig down)) and press Alt-G. The desired folder quick opens. No navigation any more. This is an amazing tool.

**QuickPicks:** Pathagoras offers may tools. You can assign your favorite tools (up to 15 of them) to your QuickPicks menu.

**Navigation tools:** Click the small arrow at the lower right of the first block of Pathagoras tools. You will be presents a collection of tools that will make your navigation processes easier. There you can open the folder of underlying document  
Copy file name to clipboard

### Document Disassembly

This is a 'must-know' tool for real document assembly-philes. It's the quickest way to build your libraries of clauses, snippets, signature blockes etc. Simple highlight a block of text. DropDown a List into which you wish to add the highlighted text. Select the 'Save Text to Folder' element at the foot of the selected list. When prompted, provide a name.



### 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 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' level of help as well.

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

Contact information is spread across as many places as we could find so that you do not have to hunt for an email address or telephone number, and we repeat it here. Let us know if we can ever be of service.

Pathagoras

Innovative Software Products of VA, LLC

Roy Lasris, President

[www.pathagoras.com](http://www.pathagoras.com)

[info@pathagoras.com](mailto:info@pathagoras.com)

tel: 866-PATHAGOras (1-866-728-4246) (tollfree)

tel2:+1 (757) 877-2244 (USA)

117 Chisman Landing  
Seaford, VA 23696 USA

**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.)

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], [red/#yellow/blue/white] (default set); [!seller!he/she/it/them] . . .  
[!seller!his/hers/its/theirs] (grouped)

***Sample Optional text:***

Simple: { Please call me so that we can discuss the various options outlined in this letter. }

Robust: <<\*Optional\*Request call\*Please call me so that we can discuss the various options outlined in this letter.>>

***Sample Options (multiple choice) text:***

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

<<\*Options\*Call/Write/Fax\*Please call me so that we can discuss the various options outlined in this letter./Please email me with any questions you may have at the following address: info@getawidget.com./Please send us a fax with your order and questions.>>

Task	Boundary Markers	Example	Result
<b>Simple variables.</b> (Variables are place holders in documents which will be replaced with personal text.)	“[” and “]” surrounding the variable. A variable name can be 1 to 40 characters	... by and between <b>[Party 1]</b> , party of the first part ....	after entering “ <i>John Smith</i> ” in Instant Database screen, ... by and between John Smith, party of the first part . . .
<b>Multiple Choice variables.</b> (Variables used to provide short choices from which the end user can select.)	<b>[choice1/choice2/choice3]</b>	[he/she/it] ; [red/yellow/blue/white]	Dropdown of multiple choices is presented in Instant Database screen for selection.
<b>Default</b>			
<b>Groups</b>	<b>! and !(within a variable)</b>	[!sex!he/she] . . . [[!sex!him/her]	
<b>Aliases</b>	<b>*and *(within a variable)</b>	[*States*]	
<b>Titles</b>	A colon after the title	[custodial parent:mother/father]	
<b>The ‘Intelligent A’</b>	<b>[**a] or **[a/an]</b>	<b>[**a]</b> <b>[Alabama/Georgia/Florida]</b> <b>corporation</b>	Processed after you select noun, Intelligent A will automatically become the appropriate article.
<b>Calculations (in line)</b>	“ <b>[#Math#varname=</b> ” and “ <b>]</b> ”	You ordered [quantity] widgets at [price] each. The total of your order is <b>[#Math#totprice=</b> [quantity] x [price] <b>]</b>	If quantity is 50 and price is 2 then totprice will be 100.
<b>Date Math</b> (Add any time period to a fixed date. Calculate the ‘calendar’ results of the date math, or the ‘expiry’ date (the day before the calendar result). E.g., Jan 1 + 2 weeks is Jan 15 on the ‘calendar.’ The ‘expiry date’ of that calculation is Jan 14 (at midnight)	“ <b>[#Math#varname=</b> ” and “ <b>]</b> ” (the presence of “day”, “week”, “month” or “year” in the second operand triggers date math.) If the <i>varname</i> starts or ends with Age, an age will be calculated.	The contract will begin on [start date] and will terminate in three months, to wit: <b>[#Math#end date=</b> [start date] + [3 months] <b>]</b> I was born on [Birthdate] and I am <b>[#Math#MyAge=</b> [today]-[birthdate] <b>]</b> years old.	If start date=[January 1, 2013] , the end date will be March 1, 2013. (If you want the ‘expiry date,’ i.e., the day before, insert “(exp)” after ‘days’, ‘weeks’, etc.) E.g., <b>[#Math#end date=</b> [start date] + [3 months(exp)] <b>]</b>
<b>Date functions: (ext), (day), (month), (mon), (year), (yr)</b>	<b>[dateterm(ext)]</b>	[Date of Contract(ext)]	
<b>[Today]</b>			

Task	Boundary Markers	Example	Result
'Don't save'	'- and -' at each side of variable	[-Date of Contract-)	
Spellouts: <s>, <ss>,<S>,<SS>,<\$>,<\$ \$>,<%>	<s>[Variable] or [Variable]<s>	<<\$ \$>>[Purchase Price]	\$5,432.10 (Five thousand four hundred thirty-two and 10.100 dollars)
Natural Slashes	[“1/4”/”1/2”/”all”] (quotes) OR [1/4/OR1/2/ORall] (/OR divider)		1/4 (if first choice selected)  All (if 3 <sup>rd</sup> choice selected)
Nested Variables	Outside bracket to denote multiple-choices, insided bracktets to denote the nestings.	[[Client Name]/[Client1 Name] and [Client2 Name]]	Once selection is made in IDB screen, double click the result. Proper variables will be added to IDB screen.



<p><b>Simple Optional text blocks.</b> ‘Keep it’ or ‘delete it’ text snippets. Enclose the word(s), sentence(s) or paragraph(s) between curly braces (shown in next column) When encountered during document processing, Pathagoras asks ‘Keep’ or ‘Delete’?</p>	<p>“{” and “}”</p>	<p>... { You may return this product within 30 days for a full refund. }</p>	<p>After answering ‘Yes’ to ‘Do you want to keep this text?’ question:</p> <p>You may return this product within 30 days for a full refund.</p>
<p><b>Simple Options text blocks.</b> Choices (typically sentences and paragraphs) processed at document assembly time. Choices are indicated by the separator “/OR”.</p>	<p>“{” and “}” with “/OR” (mutually exclusive choices) or “/ANDOR” (multiple choices) as separator (caps required)</p>	<p>... { AAAAA/ORBBBB/ORCCCC } ...</p>	<p>after choosing the 2<sup>nd</sup> option text: .... BBBB...</p>
<p><b>Advanced *Optional* text blocks</b> These allow you to pose a question. To set up, enclose the word(s), sentence(s) or paragraph(s) that you want to be optional between angle brackets. Add an introductory *Optional* and the question, followed by a closing “*”,</p>	<p>&lt;&lt;*Optional*Question* . . . . &gt;&gt;</p>	<p>&lt;&lt;*Optional* Allow returns?* You may return this product within 30 days for a full refund.&gt;&gt;</p>	<p>If answered ‘Yes,’ to the ‘Allow returns’ question, the substantive text remains:</p> <p>You may return this product within 30 days for a full refund.</p> <p>If answered ‘No,’ all text removed.</p>
<p><b>Advanced *Options* text block.</b> Use to provide specific short multiple choice questions. To set up, enclose the word(s), sentence(s) or paragraph(s) between angle brackets. Add an introductory *Optional* and the questions, also separated by slashes, followed by a “*” to close out administrative section of the block.</p>	<p>&lt;&lt;*Options*Q1 /Q2/Q3*Option 1 text/Option 2 text/Option 3 text&gt;&gt;</p>	<p>&lt;&lt;*Options*FedEx/1<sup>st</sup> Class Mail/Ground*by Federal Express (2 day delivery)/ by United States Postal Service (first class)/by ground delivery via United Parcel Service.&gt;&gt;</p>	<p>After choosing the 3<sup>rd</sup> option in the short question list (“Ground”):</p> <p>by ground delivery via United Parcel Service.</p>
<p><b>!Groups!</b> A !groupname! can be used to tie together related multiple choice variables or Options text blocks. When one member of the group is selected the same choice (based on <i>position</i>, not value) is made for each other member of the group.</p>	<p>!groupname!choice 1/choice 2/choice 3] !groupname!optional text in document}</p>	<p><b>Variables:</b> [!client!he/she/it] . . . [!client!his/hers/its] <b>Optional:</b> {!returns! Returns are allowed within 14 days.} . . . {!returns! Returns must contain all original parts.} ;</p>	<p>All members of the group are treated identically. If the second position of the group is selected when the first member of the group is encountered, the second position is selected</p>

			for all other members of the group.
<b>Advanced *Options* text block, with groupname.</b> This routine allows you to pose specific short multiple choice question. To set up, enclose the word(s), sentence(s) or paragraph(s) between angle brackets. Add an introductory <b>*Optional*</b> and the questions, also separated by slashes, followed by a “*” to close out administrative section of the block.	<b>&lt;&lt;*Options*!shipping!Q1/Q2/Q3*Option 1 text/Option 2 text/Option 3 text&gt;&gt;</b>	<<*Options*!shipping!FedEx/1 <sup>st</sup> Class Mail/Ground*by Federal Express (2 day delivery)/ by United States Postal Service (first class)/by ground delivery via United Parcel Service.>>  Additional Cost for shipping: <<*Options*!shipping!*\$15/\$10/\$0>>	After choosing the 3 <sup>rd</sup> option in the short question list (“Ground”):  by ground delivery via United Parcel Service.  Additional Cost for shipping: \$0





<b>Repeat.</b> Allows text to be repeated a designated number of time. If a [variable] appears within the Repeat text block, it will be duplicated and incremented.. !Groupnames! can be added so that repeat values are carried to other document sections.	<<*Repeat*text text text>> <<*Repeat*[variable name]>>	<<*Repeat*[Seller Name]>> <<*Repeat(and)*[Seller Name]>> <<*Repeat(or)*[Seller Name]>> <<*Repeat*!seller![Seller Name]>>	If you respond “3” when Pathagoras asks “How many of the group are there”: [seller@1] [seller@2] [seller@3].  If you used the (and) modifier: [seller@1], [seller@2] and [seller@3].
Note: Colors are for illustration purposes only. They are not required. If used, the colors ‘disappear’ upon document processing.			





---

# Index

## - C -

Customer Service 25

## - E -

Error Messages 26

## - H -

Help 25

## - I -

Introduction 5

## - S -

Support 25

## - T -

Technical Support 25

If you are looking for a document assembly program to help you to create standard documents/pleading/contracts, etc., there is not one out there with a shallower learning curve than Pathagoras. We make this claim because:

\*An automated variable is nothing more than a word or phrase between square brackets. No formulas or fields are required. All text is standard keyboard text.

\*Automated optional text is simply any text between curly brackets. It just cannot get any easier or faster than that.

\*Pathagoras even self-generates its own data collection form for each document you create. (No other program can do that.) The data entered can be used for all future documents for that same client.

While we understand how precious time is, if you want to create time, you should be adopting a program that does that for you.

Pathagoras is such a program.

Pathagoras prides itself on providing 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. We will call you back 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.

Pathagoras  
Innovative Software Products of VA, LLC  
Roy Lasris, President  
[www.pathagoras.com](http://www.pathagoras.com)  
[info@pathagoras.com](mailto:info@pathagoras.com)  
tel: 866-PATHAGOras (1-866-728-4246) (tollfree)  
tel2:+1 (757) 877-2244 (USA)