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| **Document Assembly** |
| **Document Assembly screen:** Displays current content of selected book (defined below) in left panel. Move desired sub-set of clauses to the right panel. Rearrange as needed and press Next. Selected clauses are instantly assembled into single document,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 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. | **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 repoint the ‘book’ and the DropDown List to the proper location.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 compete) 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 means a new line): 100/120/140/160/300f/wil.list |