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| **One Page Overview (Beginners)** |

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| **Insert variables into source document for automated replacement.**  Open a document that you wish to '*Pathagorize*.' We will call this document the ‘source’ document. Put [square brackets] around existing or new words or short phrases that you want to serve as 'variables.' (A ‘variable’ is simply a holding spot for a personal value.) Create multiple-choice variables in a similar fashion. List all choices within the square brackets (as above), but separate each choice with a forward ('/') slash. (See example below.)  Enclose text that you want to be “optional” (keep it or delete it) within {curly braces}. (See example below.)  Close and save the document into an appropriate forms folder.  **Example:**  This is an example of a 'Pathagorized' document:  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]  **Hints & Tips:**  Variables should have a ‘variable sounding,’ reasonably descriptive names. “[Date of Letter]” is more meaningful than just “[Date]”. Use “[Name of Customer]” instead of plain “[Name]”.  The style (upper/lower/bold/ italics, etc.) of the variable will control how it is replaced. (See ‘Assign Data to Variables’ in next column.)  The document you create can be a ‘complete’ (or overbuilt) document from which you will remove unwanted sections, or it can be a building block of text. With the ‘building block’ approach, you start from a ‘blank screen’ and pour in the desired building blocks using various Pathagoras tools.  Save the document you have *‘Pathagorized’* before proceeding to the next step(s).  (You can copy and paste the above into a ‘real’ editing screen to see its action. Or, press <Alt-P> to ‘p’rocess the document as if you had recalled it via document assembly. Pathagoras will highlight each optional text block it finds and will ask if you want to keep it. Answer ‘Yes’ or ‘No’, as appropriate. When the ‘optional text’ processing is done, press Alt-D to replace the variables with ‘real’ text.) | **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.) Press the Scan button (lower left) to tell Pathagoras to search for and display all bracketed variables.  Type an appropriate value into the textboxes at the right for each variable. If a multiple-choice variable, select from the drop-down lists. Press the Tab key to move from line to line. Type in upper and lower case (normal style) for most values. The style of the variable in the document controls how the replacement will look.  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 '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. Save the variables-to-values pairings as a new record, if desired.  **‘DropDown List’ and ‘Libraries & Books’**  You should avoid using original ‘source’ text for creating a document for a client or customer. That way you won’t accidentally overwrite you source text.  Pathagoras makes it easy to implement this rule by always presenting an exact copy of the source text. Pathagoras' '[DropDown Lists](http://www.pathagoras.com/help/dropdown_lists.htm)' and ‘[Libraries & Books](http://www.pathagoras.com/help/document_assembly.htm)’ modules protect your original work in a simple, but very elegant style. Read more about these tools in the Pathagoras Manual by clicking one of the above links.  **Creating a Document**  To create a new document:  ***A. Via a DropDown List*** *(single clause selection):*  1 Drop down the List that you previously created that points to the folder that contains the desired text.  2. Click on the desired clause. That’s it!  ***B. Via Document Assembly*** *(multiple clauses):*  1. Click the Document Assembly button.  2. Click the radio button on the line of the book from which clauses are to be drawn. Click 'Next'.  3. Choose the clauses/documents you wish to assemble from the left column and move them to the right. Click 'Next'.  As a document is being assembled, any *{Optional and Options}* text blocks will be automatically processed. To scan for and replace *[variables]*, press Alt-D (see top of this column). |