THE PATHAGORAS SYSTEM

The
'No Set-up'
Method

Absolute

The Basics. Nothing More.

Document Assembly
Document Automation
Document Management

Introduction

OK. We know why you are here. You have no time right now to set up a document assembly system with all the bells and whistles. But you do want a taste of what Pathagoras can do for you. This is the right place to start.

Pathagoras is quite functional right out of the box. We will prove it to you right now.

These two tools will save you hours of work.

The two Pathagoras' tools featured in this publication are available immediately after you install the program:

➤*DropDown Lists:* These are 'always on, always visible' lists which can point to up to 10 of your most frequently used folders. Creating one requires only that you navigate *one time* to an existing folder. It takes only a few mouse clicks to do this.

➤*Instant Database:* This feature will instantly scan a document for any variables that are enclosed with plain text [square brackets]. If you already have form documents with [square bracketed variables], you are ready to go. If not, just take any document, create one or more variables within square brackets, and then you are ready to go. It truly is as simple as that.

Using just these tools, you will be able to:

1. instantly display a copy of any existing document from any of up to 10 existing folders (never again having to navigate to find it) and

2. quickly personalize any document that you recall.

> *When we originally conceived Pathagoras, we set as a primary goal creating a program entry point that required absolutely no programming, and as little setup as possible.*
>
> *We have achieved that goal.*
>
> *Of course, there is much more to Pathagoras than the features illustrated here..*
> *But by implementing just these two, you will begin to save the time needed to explore and implement the many other robust features that Pathagoras has to offer.*

Sister Manuals:

Beginners' Guide (a wonderful resource to explore even more Pathagoras features)

The 7-day Plan (learn program basics in 7 days @ 15 minutes per day. Our most popular manual.)

The Main Manual (800+ pages of all Pathagoras has to offer, with copious examples and illustrations)

DropDown Lists

A 'drop down list' is any of those lists that currently sit in the toolbar area of your Word screen. They give you instant access to a variety of settings. You are already familiar with drop down lists that allow you to quickly select Fonts and Styles. We implement '*DropDown Lists'* in the same fashion.

'*DropDown Lists'* will give you instant access to the contents of up to 10 document folders that already exist on your computer or network.

Once created, each *List* is always on and always visible. Once created, you will never have to navigate to the contents of the folder represented by the *DropDown List* again.

What to Do:

To create your first *DropDown List*, click the button labeled "DropDown Lists" behind the Pathagoras tab (see image at right).

Click the "DropDown List" entry.

Follow the prompts. Accept the default answers for the first two screens. Read the instructions on the 3rd screen and then navigate to the folder containing the documents you want to populate the list.

When you arrive at the desired folder, select a document in that folder. *It absolutely does not matter which document you select.* It is the folder (not the document) that is being registered.

The resulting *DropDown List* will appear in the menu area of your Word screen. (See image below. '**Wills**' is the name of the DropDown List shown in the example). To create additional *DropDown Lists*, click the button that reads 'Create New DDL'. Follow the same instructions outlined above for each list (up to 10) you wish to create.
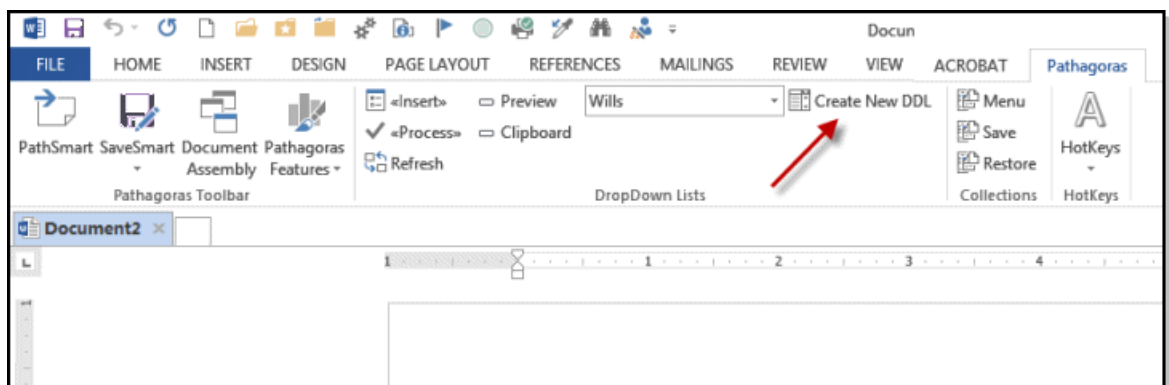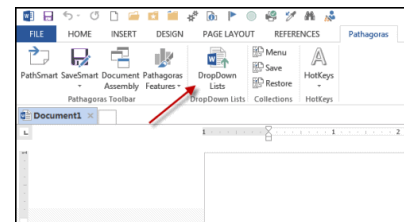
How to use a DropDown List:

When you click the down-pointing arrow to the right of a *DropDown List*, every document in the target folder will display. Point to and click on a desired document. Pathagoras will instantly transfer an exact duplicate of the selected document onto your editing screen. It will be identical in every regard to the original (but it is not the original, so you cannot accidentally overwrite it).
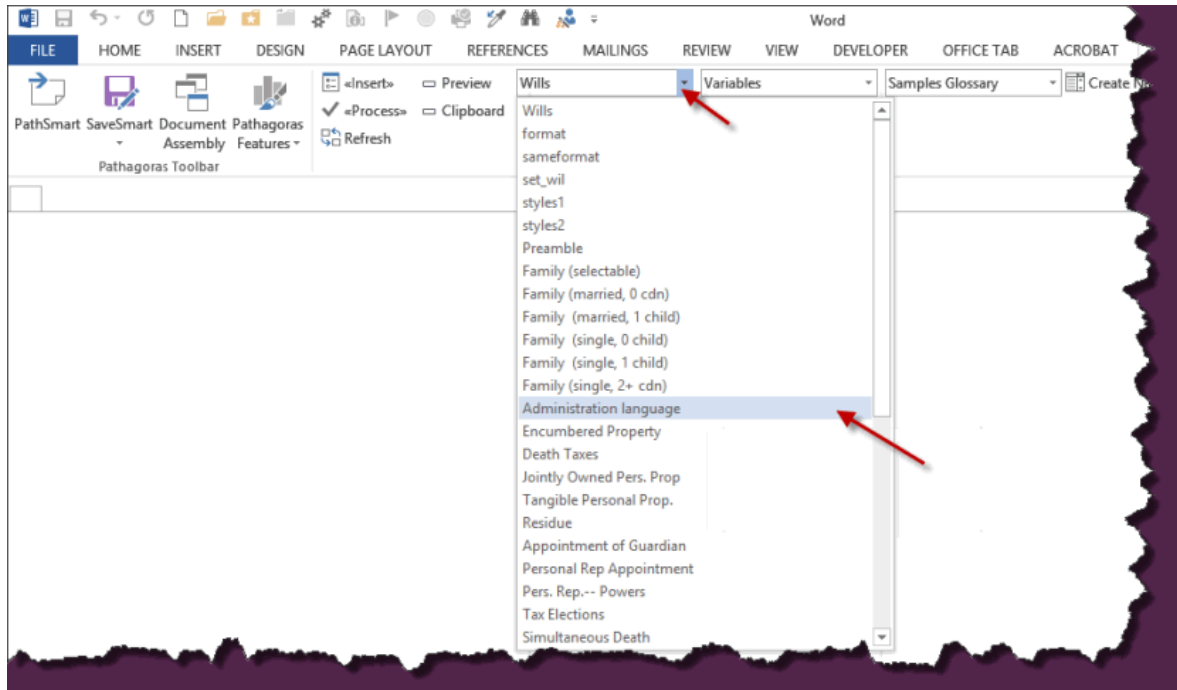
Notes and other useful information about DropDown Lists:

The contents of a *DropDown List* can be any folder on your system. The folder can contain just about anything -- Word documents (of course), Word Perfect® documents, images, PDF files, Excel spreadsheets, and more.

You can maintain up to 10 *DropDown Lists* simultaneously, five in tray 1 and five in tray 2. (Five only in the Demo version.)

These Lists will remain on-screen during your entire Word processing session and they will reappear each time you exit and then re-open Word.

Note the button stacks to the left of the *Lists*. The top/left most button will read either **«New Doc»** or **«Insert».** You can toggle this button to either **«Insert»** your selection in the current document or to first create a **«New Document»** before applying the selected text. Check out the other buttons as well which allow you to Preview a clause before you select it. You can even transfer the content of the selection into clipboard memory instead of into your document. In that case, the target clause or document can be used in any Windows application by using a Paste command.

If you add more clauses to the folder represented by a DropDown List, you must **«Refresh»** the list to make sure it has captured everything. Scroll down to the bottom of the List and press the **«Refresh»** button. That will cause Pathagoras to re-read the folder and keep the contents of the list up-to-date.

To learn more about the many other features and tools contained within DropDown Lists, [click here](). You will be taken to the appropriate page of the main Pathagoras Help Manual.

Instant Database

Pathagoras' *'Instant Database'* lets your quickly replace 'plain text' [bracketed variables] that you place in a source document with 'personal' values. It will also let you save those personal replacement values for reuse with other documents. (You may already have documents containing [bracketed variables]. Many 3rd party forms providers so 'code' their variables. If so, you can use those documents for this exercise.)

Creating Variables: It is remarkably easy to create variables. Just find a document to which you want to add them. Perhaps a cover letter, or a pleading. Type variables such as [Client Name], [Customer Address], [Date of Meeting], and the like in strategic places throughout the document. Save the document. (**Tip 1**: initially start with just two or three variables to get a feel for what is happening. Then go back and add more once you have a feel for the action. **Tip 2**: consider saving the document in the folder to which you assigned a *DropDown List* in the previous exercise.)

You can 'pre-list' a collection of values in a 'multiple choice' variable. It's just like a regular variable, but the choices are separated by a forward slash. E.g., "My favorite ice-cream flavor is [chocolate/vanilla/Rocky Road]."

Replacing Variables:

1. Recall to the editing screen any document that contains [bracketed variables]. See above paragraphs for instructions on creating bracketed variables.)

2. Press the key combination <Alt-D> from your keyboard. The Instant Database screen will display. (It will be similar to the screen at the right, but the section which contains the variables and replacement values will be blank.)

3. Press the button labeled Scan at the lower-left corner of the screen. Pathagoras will quickly scan your document for [bracketed variables] that are present and list them in the left side of the form.

4. Provide an appropriate value for each variable in the right side of the form. (Any multiple choice variables will be presented in drop down lists so that you can just select a value instead of typing it. A multiple choice variable is a regular variable with multiple possible choices, each choice separated from the next with a forward slash.)

5. Click the Next>> button in the lower right corner of the form. Pathagoras will ask if you want to save the data as a new record. Say "Yes," and give this record a name (name, number or other value will work). When you press the final OK button, the data record will be saved

and all of the [bracketed variables] will be quickly replaced with the personal data you assigned.

6. Let's now try the 'Database' part of 'Instant Database'. Repeat steps 1 and 2 above. Instead of pressing "Scan" (which is step 3), we want you to recall the previously saved Matter Data: click the drop down list in the upper right corner of the Instant Database screen marked "Matter Data" and locate the record you saved in Step 4, above. Make any changes to the values you wish to make. Then press the Next>> button. All replacements are quickly made.

Imagine for a moment that you have lots of documents (pleadings, forms, cover letters, contracts, etc.) each of which is composed using identically named [bracketed variables] at appropriate locations. Once you have saved out the Matter Data, you will never have to enter that data again.

To learn more about the Instant Database, click here. You will be taken to the appropriate section of the main Help Manual. While there, explore the many hidden features of this powerful tool.

Notes and other information about variables and the Instant Database:

- While this exercise suggested that you would start an Instant Database session using the original document, this was for exercise purposes only. In practice, you should *never* use the original document, lest you run the risk of accidentally overwriting it. Pathagoras makes it easy to avoid that risk. How that is done is explained in the sister manuals and in the Main Manual, which we hope you will explore shortly.

- Instant Database lets you search for and replace up to 900 distinct variables with 'personal' data. The style (case, font, emphasis) of the variable in the source document controls its replacement when the Instant Database is run against it. So if the document variable is **[CLIENT NAME]** (bold and upper case) and the replacement text in the IDB screen is 'John Doe', the resulting value will be **JOHN DOE** (bold and upper case).

- The Instant Database feature works for all of your documents. We implore you not to think of Pathagoras as a 'Will' program or a 'Contract' writing program. It can handle every single document, letter, form, cover sheet, etc. you produce in your office.

- Click here 10 to go to the page in this pamphlet labeled "Sample 'Pathagorized' Text" for more instructions and examples of how to create more advanced automated variables.

- While not demonstrated in this Guide, Pathagoras provides several 'cool tools' that will let you Pathagorize a document much more quickly and automatically than the manual method we showed you above. You can convert 'people names' to addresses en masse and with little effort. See the Main Manual for a discussion on the Create Variables Assistant.

It is easy now to pull the two features discussed in this Pamphlet together. Make sure that the document you 'Pathagorized' above is in the folder represented by one of the DropDown Lists you created in the previous exercise. (If the document was created or added after the DropDown List was created, scroll to the bottom of the DropDown List and click the **«Refresh»** button. That will cause Pathagoras to 're-read' the folder and present its updated contents.)

Final Remarks

Please note: The tools discussed above just scratch the surface of the many powerful features and tools that Pathagoras provides.

After implementing just those discussed above, many customers feel that Pathagoras is still a 'bargain.' However, by spending just a bit more time with your documents, you can reap many more rewards from your investment.

- You can add 'logic' to your documents with the programs powerful <<Options/Optional>> blocks.

- You can 'Pathagorize' documents *en masse*. You can also replace variables *en masse* across multiple documents.

- You can add 'repeat' functions when multiple instances of the same clause are required.

- You can easily create what we call MultiChoice *Lists* reflecting a selectable collection of names, locations, numbers, etc., which can be referenced by a single 'alias' word. You can (optionally) tie individual elements of these lists together using a !groupname! so that when you select one item from one list, you can retrieve the appropriate value from another list. (Great for setting pronouns and for selecting a name, and getting the corresponding address, phone number, etc.)

- You can easily disassemble documents into their component parts and reassemble them into complete, perfect documents.

- You can create 'clause-sets': Clause-sets are lists of clauses that represent, and can be quickly assembled into, complete documents. The benefit of clause-sets is that you can edit a single clause within the set and the changes will permeate across the entire range of other documents which use that clause.

- You can create an unlimited number of 'libraries and books' so that you can quickly access any element of your collection of clause, organized in a logical and meaningful fashion.

The list of features goes on and on.

When you finish this booklet, we encourage you to check out The Pathagoras 7-Day Plan or the Beginners Guide (or both). And we invite you to the Main Manual which will be a terrific resource for you as you begin to develop and personalize your complete document assembly system.

One Page Quick Start Guide

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 example below.)

Enclose text that you want to be "optional" within {curly braces}. (See example 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 'Pathagorized' text:

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 and always call up a copy of the source text. 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!

Sample 'Pathagorized' Text

It takes only a few moments to create variables for your documents.

1. Recall any document that you want to be a 'form' document (also called a 'template').

2. Locate the personal terms in the document and place brackets around each term. Then change the personal term to something more generic. (By 'personal terms' we mean things like names, addresses, dates, colors, quantities and similar items. By 'brackets', we mean 'plain text' square brackets -- the ones next to your Enter key on the keyboard.) If you want to create a list of choices from which the end user may choose, enclose the entire list within the brackets, and separate the individual items in the list with a forward slash.

- So, for example 'John Quincy Doe' would become '[Client Name].' While you can covert a date inside the document to a variable that you might call "[Date]", that is not particularly descriptive. Consider something like "[Date Contract Signed]".

- If, for example, the original document references a city, but you want to provide the end-user a list of cities from which to choose, use something like this: [Miami/Ft. Lauderdale/West Palm Beach/Boca Raton].

3. Save the document. Consider saving the document in a folder to which you have assigned a DropDown List in the earlier lesson.

Sample Variables:

Simple: [Client Name], [product]

MultipleChoice: [red/yellow/blue/aqua marine], [he/she/it/them]

Grouped Multiple Choice [!seller!he/she/they] . . . [!seller!him/her/their] . . . [!seller!his/hers/theirs]

Sample Optional text **(enclosures are plain text 'curly brackets')***:*

{Please call me as soon so that we can discuss the various options that I have outlined in this letter.}

Sample Options (multiple choice) text:

{Please call me as soon so that we can discuss the various options that I have 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.}

Technical Support

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' 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 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.

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Remote Assistance:

If you call us for guidance, or to report a bug that can be best explained visually, we likely can most effectively address the situation via 'virtual presence.' In other words, we can (and would like to) virtually sit at your machine. That way we can see the same thing that you are seeing at the same time that you are seeing it.

This can be readily accomplished via a wide variety of remote assistance tools. Our tool of preference is GoToMeeting®, a product of the Citrix Corporation. It is easy to use, offers quick response time and allows us to sit together while we share information on your computer. If you feel a virtual meeting would be helpful, don't hesitate to say "Can we do a GoToMeeting?" (If you are otherwise covered under the Annual Support Agreement, there is no charge for the meeting. And don't worry about costs on our end. We have none beyond the annual subscription that we pay for GoToMeeting.)

To activate remote assistance after we have agreed to a session, display the Utilities/Settings screen and click the Miscellaneous tab. Click the red "Remote Assistance" button. Enter the Meeting ID number that we will provide in the text box and click the Remote Assistance button again to make the connection.

GoToMeeting® is a registered trademark of the Citrix Corporation

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