



THE PATHAGORAS
SYSTEM

for Excel

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Supplemental Manual

**for use with
Microsoft® Excel®**

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Printed: June 2010 in Yorktown, Virginia

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1 Introduction to Pathagoras for Excel



for use with Microsoft Excel®

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We would greatly appreciate your input as to the usefulness and 'usability' of this Guide. If you have comments, corrections or suggestions for improvement, please send us an email to excel@pathagoras.com.

Pathagoras™ is a multi-faceted document authoring tool. It is primarily a 'plain-text based' document assembly and automation system. Pathagoras ships with its own Instant Database to store and replace information used to replace variables in an assembled document. It really shines when it comes to ease of creation and reuse of data records.

The Excel version of Pathagoras can be used to replace variables within a spreadsheet in the same manner as variables are replaced in a document.

And Excel can readily be used as a data *collection* source. With the Pathagoras module installed, a user can complete a properly configured Excel 'intake sheet' ('live' or posted on the Internet) and the collected data can be instantly converted into an Instant Database record. This record can be used, with no further processing, by Pathagoras for Word.

Extending the above, a properly designed spreadsheet can contain not just static values (for example, names, addresses, etc.) but perhaps more importantly to Excel users, *calculations*. The results of complex calculations can readily be transferred from a properly configured Excel spreadsheet to an Instant Database record in just a few clicks. The process can be made absolutely seamless to the end user.

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By the way: it's pronounced p'-THA-go-rus

1.1 Download and Installation

Installing Pathagoras for Excel

Pathagoras is distributed exclusively over the Internet. At the present time, it is in BETA TESTING only. You were (or upon request will be) mailed a zipped copy of the program. Unzip it using any program designed for that purpose. The result will be a file called 'pathagoras.xla'. You must place this file in the startup folder for Excel® projects. *If you wish to beta test this new product, please contact us a excel@pathagoras.com*

(Pathagoras is an Excel add-in and runs from within Excel. It has no 'stand-alone' capacity.)

The XLStart folder most likely is:

C:\Program Files\Microsoft Office\OfficeXX\XLStart

(If you wish to control Word from Excel, on some installations you must store the file in Word's 'Library' folder instead of XLStart.)

'XX' stands for the version number of Microsoft® Office that you have installed. (Office2007=12, Office2003=11, OfficeXP=10, Office2000=9)

When you open Excel for normal spreadsheet operations, Pathagoras will automatically run.

Access to Pathagoras' features is done through the new toolbar that now resides in the menu area of your screen:



The Pathagoras toolbar as it appears in Excel.

The first element "PathSmart" allows you quick access to your stored spreadsheets.

The second element displays the SaveSmart screen and its quick-save features

The last item is the Pathagoras dropdown features list. It displays the remaining tools available in the program



In 2007 installations, the Toolbar sits behind the 'Add-ins' tab.

If you wish to beta test this new product, please contact us a excel@pathagoras.com

2 General

Pathagoras for Excel is not the same program as its 'Pathagoras for Word' sister. For example, there is not presently a 'spreadsheet assembly' aspect to Pathagoras/Excel.

Nevertheless, most features work in Excel in a fashion identical to way they work in Word.

There are 4 distinct aspects to Pathagoras for Excel features, Each is discussed more fully in separate sections below:

1. "[Spreadsheet Management](#)"^[4]" This parallels the 'PathSmart' and 'SaveSmart' features in Word. Management features allow you to quickly recall, edit, and store spreadsheets in an organized fashion.
2. [Instant Database](#)^[4]. This feature is identical in form and purpose to the Instant Database in Pathagoras/Word. But unlike in Word, you can scan a spreadsheet for *two* kinds of variables:
 - Pathagoras can scan a spreadsheet for bracketed variables that appear as visible 'text' within a cell or a text box. This function is identical to that found in Pathagoras (Word).
 - Pathagoras can scan a spreadsheet for *named cells* and treat them as if they were bracketed variables.
3. [Control Word from Excel](#)^[5].

From Excel, you perform certain document assembly tasks in Word. While in Excel, you can select a Library, then a Book and then a Form to assemble. You can also tell Pathagoras which Instant Database matter record you want to apply against the assembled document. It is all quite automatic.

4. ['Intake' and 'Data Collection/Generation' Forms](#)^[7].

Excel allows you to easily create intake/data entry forms. The types of forms you can create within Excel can be more extensive, complex, powerful or attractive than the ones you can typically create in Word.

- Any form you generate using Excel can be completed 'in house' (by you or your staff).
- Perhaps better in terms of accuracy of content and spelling, forms can be completed by your client, customer or patient. You can e-mail out the form or post it to the Internet. Once completed, your client/customer/patient can send it back to you by e-mail, or if properly configured, by clicking a 'Submit' button on the forum with just data being returned. The completed form can then be processed as if were completed locally.

The majority of this Manual, beginning with Part 6, is devoted to the creation and use of forms for intake and data collection forms.

3 Spreadsheet Management

Under construction. But keep in mind--the functions are identical in principle to those found in the PathSmart and SaveSmart modules of Pathagoras for Word. Using only number that you assign to complex or lengthy folder names, you can quickly navigate to the various folders in which you store your spreadsheets. You can also save a new spreadsheet to its proper folder by a simple reference to the SmartPath's number.

4 Instant Database

Instant Database for Excel is identical in purpose and almost identical in form to the Instant Database module in Pathagoras for Word.

The main difference is the addition of the 'Scan where and what' checkboxes just above the Scan button in the lower left corner of the screen. (See figure below.) This feature allows you to select what sections of the spreadsheet you wish Pathagoras to look for variables. (Main spreadsheet, named cells, or text boxes.)

To replace variables with values, display the Instant Database screen.

- To recall a mask or a Matter record, click the IDB button. (Sorry. <Alt-D> is not available. We're working on a hot key that will work.)
- When the IDB screen appears, select the desired Mask (left side) or Matter Record (right side). Or, Scan the current spreadsheet for variables.
- Make any changes needed in the record to accurately complete the underlying spreadsheet. Press Next>> and the variables will be replaced with the designated replacement text.

Pathagoras for Excel can find and replace variables in a variety of 'places.' The lower left hand corner of the IDB screen lists them. Check where you want the Scan function to look and where you want the replacements to be made.

You can find and replace variables:

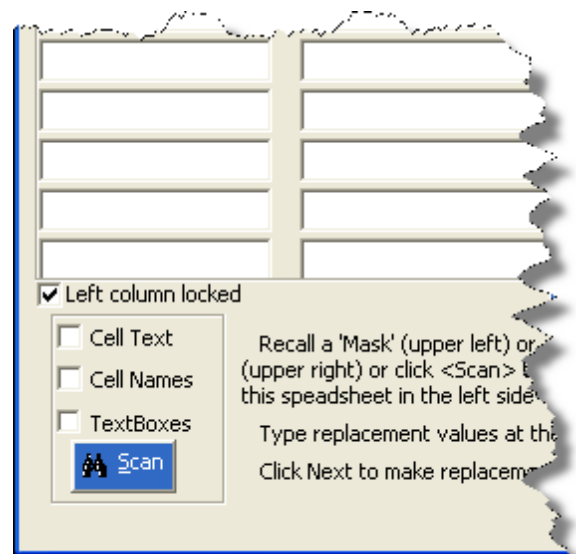
- (1) that appear as a bracketed variables within cells;

Just like in Word's version of Pathagoras, the entire spreadsheet, cell by cell, will be quickly scanned for the existence of matching variables. If found, a replacement will be made.

- (2) that are values assigned to named cells;

While a cell, if named, must be named *without* brackets.

Do not worry that the variable cannot



be found. Pathagoras handles the presence or absence of [brackets] automatically,

(3) that appear as bracketed text within text boxes;

or

(4) any combination of the above.

Read more about the IDB screenage and functions in general in the [IDB pages](#) of the main Pathagoras Manual.

5 Controlling Word from Excel

Let's assuming that you have created a data record via Excel using one of the tools discussed in this Manual. While still in Excel:

- you can select a book from a Pathagoras(Word) library;
- you can select any form in the selected book
- you can select the Instant Database record that you want to apply to the selected form or document; and
- you can direct that form to be assembled. (Control is transferred at this point to Word, but the process is seamless.)

Here are the steps:

From Excel:

Click the Pathagoras dropdown features list (the rightmost element of the Pathagoras toolbar) and click <AutoMerge w/Word> from the list.



A screen similar to the one below will appear.

Word Automation

Source of files:

Current Library **Book**

1 DOCASSEMDEMO Select a Book:

2

3

Save Underlying Record

Option Block Names	
Name	Sel.

Use this screen to [1] select the library and book, [2] select a form from the book and [3] select the IDB Matter data that you wish to merge.

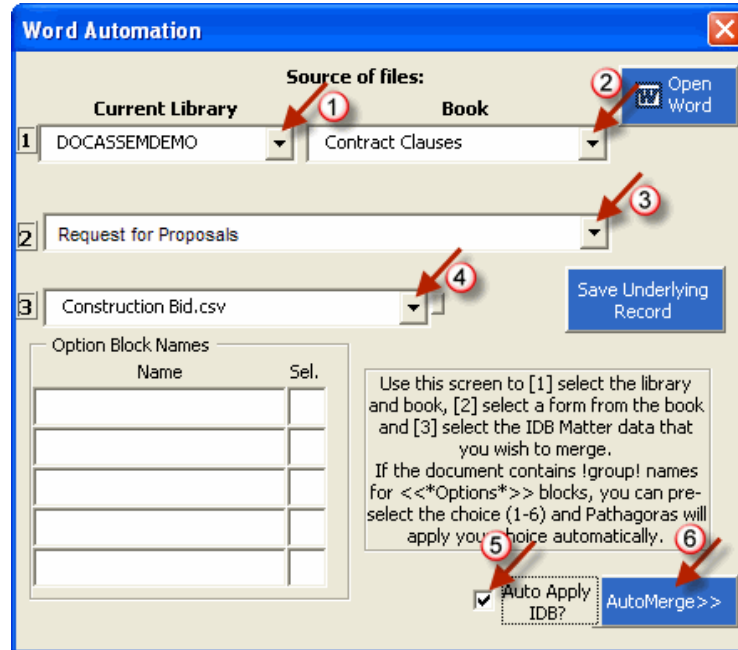
If the document contains !group! names for <<*Options*>> blocks, you can pre-select the choice (1-6) and Pathagoras will apply your choice automatically.

Auto Apply IDB? AutoMerge>>

If you want Excel to activate Word for you and call up the record you just saved (or any other record) click the Word Automation button to display the above screen.

After the initial screen displays:

- (1) & (2) Select the library and book.
- (3) Select the form you want to create.
- (4) Select the Matter Data Record you want to merge into the form selected in (3) above.
- (5) Check the Auto Apply box.
- (6) Click <<AutoMerge>>



(If you simply want to Open Word, press the blue <Open Word> button in the upper right corner.

You will be able to accomplish the exact same steps in Word.)

6 Data Collection Forms

One of the most powerful aspects of 'Pathagoras for Word' is that it can generate 'on-the-fly' a data collection form from the variables present in the currently on-screen document. It does so by reading the document's [bracketed variables] and placing them onto what we call the Instant Database screen.

The Instant Database screen is plain and unadorned in appearance, but it performs its assigned task with speed and accuracy. And it does away with the need for creating a separate input form before a document can be personalized.

In addition to the *ad hoc* method described above, 'Pathagoras for Word' also allows the administrator to create Input Form *masks* as part of the Instant Database system. These masks are intended to be true intake sheets. They can control the order of entry of data, can provide pre-typed examples and completion tips for the end user. They can provide answer lists from which the end user can select values from among a series of predetermined choices. Masks help the data-entry person to more accurately input the client/customer/patient's personal information used to complete the assembled document.

But the screen used by a mask is still the simple, unadorned, Instant Database form described above.

The Excel advantage: Sometimes a more extensive, complete, attractive, complex etc. intake form is needed or desired. Pathagoras for Excel can provide that.

Here are some situations we contemplate:

a. **Off-site collection of data.** The typical Instant Database routine in 'Pathagoras for Word' contemplates data entry on the computer on which you are working. It also contemplates that *you* will be providing the data input labor.

Sometimes the entity from whom you want to gather data isn't within your office and/or doesn't have Pathagoras installed. For example, it can be safer and more accurate when the client/customer/patient provides the basic information and does the spelling. In such cases, the Excel solution is ideal. Just send the form over to the client or customer to complete.

Almost everyone has Excel (or a spreadsheet program that can create an Excel-type spreadsheet, e.g. Corel's Quattro Pro). You can create a customer form --let's say an intake form -- specifically designed to gather the desired data from the customer. You can send it over to the client or customer for completion (or direct to client or customer to a website where it can be completed on-line or downloaded). Pathagoras is not needed to complete the forms discussed in this Manual.

Once completed, the customer can send it back by email. You then can open the spreadsheet and use Pathagoras (Excel) to instantly move the data into an IDB record.

b. **Intake form 'design control.'** Perhaps you just want something 'prettier' or with more eye-appeal. Much fancier and user-friendly intake sheets can be designed using Excel.

c. **More mathematical power and function.** Perhaps you need something more functional and powerful in terms of mathematics that only a spreadsheet can offer. Word is rather limited in its math 'skills.' Excel, on the other hand, is ideally suited for complex calculations.

d. **More control regarding validation and cascading answer sets.** In addition to powerful calculation capabilities, Excel provides very powerful validation, lookup and a myriad of other tools which promote speed and accuracy in the collection of data and selection of values. Excel allows you to select a 'top level' response (a 'category', a 'type') in one cell of the spreadsheet and by that choice alone, present to the user a limited selection of choices for the remaining cells that need to be completed. The end result of cascading answers is accuracy in result, accuracy in spelling, and less confusion by the end user as to what choices are available in a give setting.

The primary goal underlying creating Excel forms using this Manual is so that you will be able to export the data recorded in the form into an Instant Database "matter" record. This record, in turn, will be used to complete the personalization of a document assembled in Word.

There are, of course, many other uses for Excel spreadsheets, but this Manual focuses only on forms creation.

6.1 Sample Uses

For Gathering Personal Information:

Post a simple form on-line to gather the client, customer or patient's personal information and history. Or a form can be e-mailed to the client/customer/patient for completion 'at home' and then emailed back. When returned, use the Pathagoras for Excel tools to instantly create a Matter record.

In addition to the personal information that can be provided by the customer or client, you

might reserve a spot on the spreadsheet for "Office Use Only." When the completed spreadsheet is return, the 'rest' of the information can be added (e.g., responsible attorney, patient id, case number, etc.) before the Matter record is exported.

For Calculating Totals:

Bid Work: One user uses Excel to list and total the various components of a job that is being bid upon. He has name the cells that contain the identification information for the customer and the sub-totals for the various components, as well as a projected total for the entire proposal. Using Pathagoras for Excel, the totals (and other named cells) can be exported to an Instant Database record. While still in Excel, the user carries those totals automatically into a Word document designed especially to summarize the bid. The personalization of the letter occurs practically instantaneously when the autocomplete option is selected. The entire process is done without codes and fields.

Similar application: HUD-1 Settlement Statement Forms. The total amounts due from the borrower and owing to the seller can be exported to an Instant Database record and printed out in a 'summary letter.'

For Calculating Dates:

One user needs to advise a client of critical deadline dates. She has prepared a spreadsheet which calculates the dates, starting from a specific final date, and backing up for the intermediate dates. All date calculations are done by Excel. Once the spreadsheet has been populated, the Instant Database record is created and Word is activated. The user selects the appropriate Word document to mail. Press Alt-D to call up the client's IDB record (that was created in Excel but totally compatible with Word) and the deadline and intermediate dates are quickly replaced throughout the document. Print, stuff affix postage and you are done.

For Currency Conversions:

One user makes bids to recipients in many foreign countries. The Excel spreadsheet has been set up to perform conversions in several different currencies, and the conversions can be passed on to Pathagoras (Word) as the bid is being formulated.

6.2 Simple Form

Despite the fact that you can create fantastically elaborate intake forms, the first form we describe mimics the Pathagoras (Word) input method. It is simple in design. It is also likely to be the data collection form with which you will initially begin your form design work.

- In Column A place your document variables. For example, 'Name of Client', 'Customer Address', etc. There is no limit to the number of variables you can have. The only 'rule' is that the variables in the Column 1 must match the variables in the Word documents you will be associating with the data.
- Once you have listed the variables, save the form. Call it (perhaps) 'Intake Form'. That is all you need to do. (Don't worry about 'completeness.' If you need to add variables later on, just recall 'Intake Form' and add them. If you decide you want to change the order of the variables, change it. Pathagoras can handle any changes without any problems whatsoever.)
- When you are ready to create an Instant Database record, recall 'Intake Form'. In Column B

of the form, type the personal values with which you want the variables replaced.

- When you have typed in the proper values, and when you are ready to create the Instant Database record, click the Create IDB Matter Record button from the Pathogoras drop-down menu.

Notes and Limitations regarding 'Simple Forms':

- Variable names must start in Column A, Row 1.
- There can be no line/cell breaks between rows. If Pathogoras detects an empty row, it 'believes' that there are no more variables and processes only what it saw to that point.
- You must include enclosing brackets which identify the term as a variable (typically '[' and ']')

6.2.1 Augmented 'Simple Forms'

Even Simple Forms can contain references to [other cells](#)^[20] (either by name or location), [validation rules](#)^[20], cascading answer sets, and the like. Click on any of the links to read more about setting up these rules and links.

6.3 'Fancy' Forms

A 'fancy' form is so named because you can be as elaborate and fancy with its design as you wish. With the '[Simple Form](#)'^[9], the variables must be in Column A and the data you wish to export to a data record must be in Column B. With 'fancy forms' the data, the captions, the validation and lookup tables can be anywhere.

The 'drawback' (if that is a proper term) is that the name for the Instant Database variable does not derive from a list of variables in Column A. Rather, variable names derive from the names that you have assigned to the various cells which contain the variables' values.

Its 'strength' is everything else. Because you are not limited in where you place any data-carrying cell, you have much more flexibility in the design of your forms. The user input can occur in any cell and the label that introduces a particular cell can be as descriptive as you want (both in terms of text, of layout, of indenting, or spacing). There are simply no design constraints.

If you are likely to use Excel for generating your Instant Database records, you will likely adopt this second method.

The remainder of this section of the manual will be focused on the creation and design of 'fancy' forms.

6.3.1 From 'Scratch'

To create the Intake form, we start simple and then build on that. The first thing we are going to do is name cells to match the names of the variables that reside in your Word documents as closely as possible.

1. Create a rough design of how you want the worksheet to look/operate. For now, each row should reflect one item of data. Place a one or two word term that describes the first item of data that you want to collect in Column A, Row 1. This should, at least for the time being,

be the variable name. So, in A1 you might type "ClientName".

Note: If you have already adopted a set of variable in Pathagoras for Word, then the names in column A should be identical to those used in your documents, but without the brackets. The text you ultimately use in Column A can be quite descriptive. However, for reasons discussed below, for this initial markup (which involves using Excel's automated cell naming features), the text you type in this column should be the *same* as you want the actual variable to be. You will see why in the next section.

2. Repeat for Row 2 of Column A. Perhaps "ClientAddress" would reside in this line.
3. Repeat down the rows in Column A for each desired value.
4. After you have finished the typing your variables, it is time to 'name' the cells immediately to the right of the list.



Before typing any variables into cells, read the next section called "Create a Form from a Mask." You may be able to save yourself a lot of typing (and prevent typographical errors) by using an already existing mask.

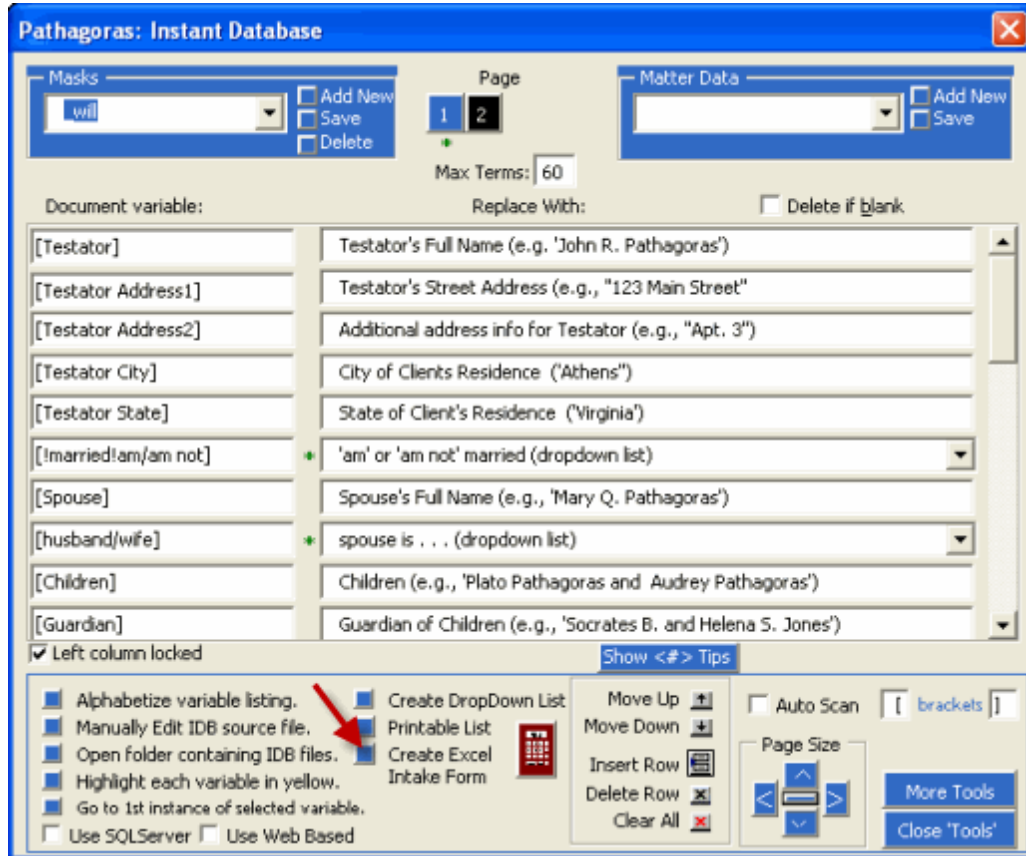
6.3.2 Create Form from a Mask

Create Intake Form from a Mask -- Automatically

Let's assume you are starting from 'scratch.' You have variables from Word but nothing in Excel. You can quickly and easily create a form by following the steps below.

1. In Excel, display the Instant Database screen.
2. Select from the dropdown list in the upper left corner of the screen the mask that contains the variables you want to work with. (If you do not have a mask, create one following the steps in the main Pathagoras Help System. [Click here for that screen.](#))
3. Click the red 'Power Tools' button to reveal additional buttons.
4. Click the Create Excel 'Intake Sheet.' (Arrow in figure below points to the button.)

Pathagoras will create a listing of the variable names down column 1 of a new Excel spreadsheet. From there you can name the cells to the right using any of the cell naming techniques discussed in earlier sections of this Manual.



Once you have finished naming your cells, go back and relabel the contents of 'Column A' to something more meaningful for the user. (Remember, once the cell is named, it doesn't matter what the content of any surrounding cell is. So use those cells to provide meaningful instructions on how to complete the adjacent cell.)

7 Naming Cells

Except for 'simple forms' Pathogoras uses *cell names* to generate the variables needed by the Instant Database module.

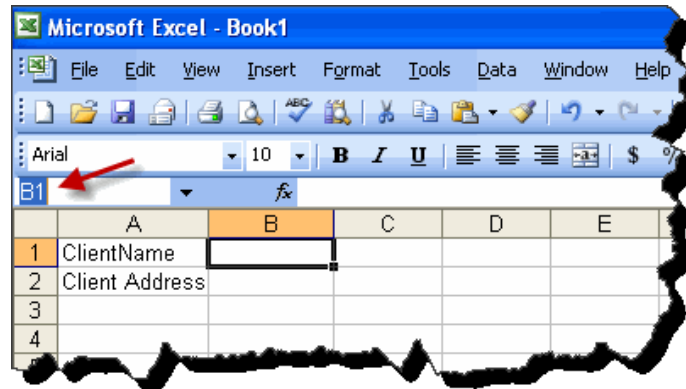
Therefore, the 'trick' in designing a most forms is in naming the cells you want to pass onto the Instant Database system. The bulk of the remainder of this section will offer tips on how to create those names.

7.1 Naming Individual Cells

Excel and Pathogoras provide several tools for automatically naming cells based on the values of adjacent cells. We'll cover that further down in the manual. But let's start at the 'beginning.'

Manually naming cells.

Activate the cell you want to name. (By activate, we just mean 'click inside of it'.) Then, click the 'Cell Name' box. (The Cell Name box is not actually labeled such. It is the box immediately above Column A. See screen shot below.) When you click inside this box, you see the last 'active' cell name highlighted in the name box ("B1" in the below example). Type "ClientName" as the name and then press the Enter key from the keyboard to lock in the name.



The arrow in the above image points to Cell Name box.
Type the name of the variable.
Press the Enter key to lock in the name.

➔Note: You must hit the Enter key when you have finished typing the name. You cannot just leave the Name box using your mouse. You can tell the name has been accepted when it centers in the box.

The Ctrl + F3 shortcut.

Activate the cell you want to name (just click inside of it). Then press Ctrl + F3. The Name window will display, showing all existing named cells and allow you to provide a name for the cell in which the cursor current resides. Type the name. Read *Tip* for more on this helpful naming feature that Excel provides.



When you press Ctrl-F3, Excel presumes that the value contained in the cell immediately to the left of the cell you are naming is the name you want to assign, and will propose it to you. (If the name of the adjacent cell is made up of two words, such as "Client Name", Excel will automatically place an underline (_) between the two words and propose "Client_Name".)

So, if you are starting from scratch, you can quickly assign the names you want as variables in the left column and then just as quickly assign names to the cells immediately adjacent.

See the next section for additional ways to name a cell from any adjacent cell.

7.2 Naming Multiple Cells

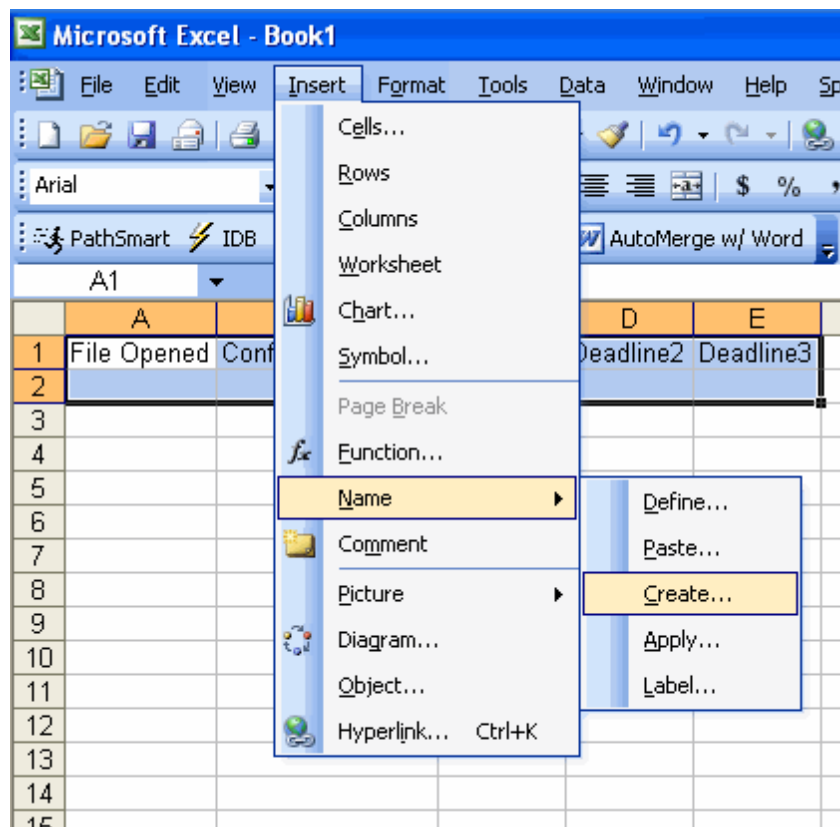
The method by which you can name a single cell was covered in the preceding section. The following discusses tricks you can use to name large groups of cells, whether adjacent or not.

Naming adjacent cells

If any row of cells contains the names of the variables that you wish to use in the Instant Database system, Excel can be used to automatically name the cells immediately *beneath* the row. (In this setting, Excel presumes that you intentionally named the top row as a label to identify what the user should insert into the next row.)

In the below example, cells it would be A1 through E1 contain variable names. You want to name the cells A2 through E2 with the identical names.

1. Highlight the entire section. In this example, cells A1 through E2 should be highlighted.
2. Click Insert from the tool bar.
3. Click Name and then click Create.



4. The below window will open. Click that the names appear in the "Top Row". (Note that Excel doesn't require that a name reference a single cell. A name can reference a large range of cells. What you are telling Excel in this routine is that the top row cell contains the text you want to use for the name, but that the top row should not itself be part of the named range.

The cells referenced by the name will be the remaining highlighted cells in the same column. As applied to this example, the top-most cell will remain the 'title' (but otherwise unaffected) and the single cell beneath the title will be named.)



Of course, if you had filled in cells down the left side of any section of your worksheet, you would highlight the block containing the names and the column to the immediate right. And you would check the Left Column box.

You can check out the results of your work simply by clicking in the various cells you just named. If you click in A2, you will see the word "File_Opened" in the name box. (Note that Excel automatically replaced the space between "File" and "Opened" with an underline. This was to insure compliance with Excel's [cell-name naming requirements](#)¹⁵.)

7.3 Cell Naming Rules

 There are some **rules** about Excel cell names that must be observed:

1. Names cannot have spaces in them.
2. Names cannot be the same as a cell reference. For example, you could not use 'Q1' as a name for a cell which contains the sales for your first quarter, because Q1 is a valid cell reference. You could however, name the range 'Q1Sales' or 'Q1_sales'.
3. Names cannot begin with "c" plus and number or "r" plus any number. Excel treat this as a cell or row reference no matter what follows. So "C1Sales" and "R5QuarterlyResults" are not valid names. "_C1Sales" and "R_5QuarterlyResults" will, however, work.
4. Names cannot *begin* with a number.
5. Names cannot include any special characters (, @, #, \$, %, &, *, [,], {, }, /, etc). The underscore character is allowed. 'ClientName' and 'Client_Name' are ok. 'Client Name' and 'Client-Name' are not.
6. If you try to name a cell something that Excel will not accept, you might get an error message, but just as often, you will not..

➔ **Note:** Excel will not accept a cell name containing brackets, the preferred marker for Pathogoras variables. Even if you are using brackets for your IDB (a preferred practice), name the cell without brackets. When you export the record, Pathogoras will ask if you want to enclose the variable names with brackets. If you say Yes, then brackets will be added, theu making them fully compatible with Pathogoras-Word.

➔ **Note:** Excel will not accept a cell name containing a slash, the character used for separating

Pathagoras multiple choice variables. Therefore, multiple choice variables cannot be used as the name for a cell. But, as discussed below, to the extent that you handle multiple choices using Excel tools, you won't need multiple choice or MultiChoice variables in Word anymore.

7.4 Cell Names and Pathagoras for Word

When Pathagoras creates an intake sheet based on a mask, it attempts to correct for 'illegal' cell names. And before it is done, it may have created cell names that do not precisely match the original variables. Any changes Pathagoras made in order to complete the process are shown in the 3rd column, in red. The most common change is the insertion of an underscore between each word of a multi-word variable. Client Name would become Client_Name because spaces are 'illegal' in a cell name

You need to make a choice here:

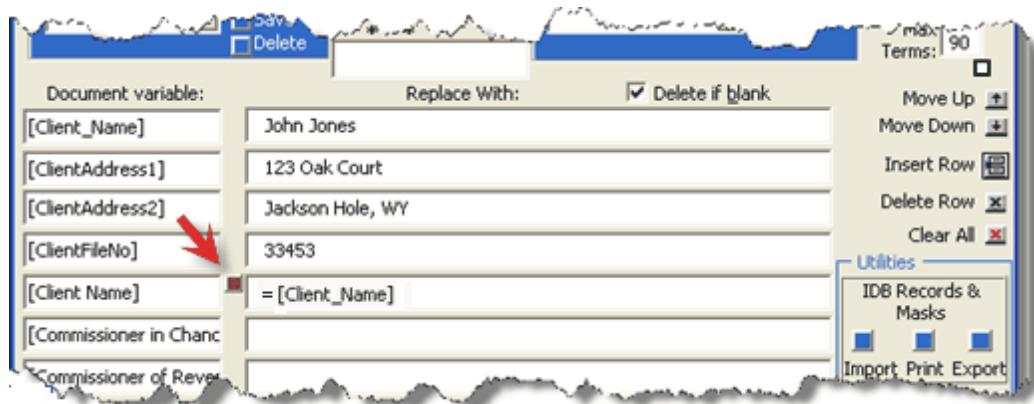
(1) You can keep the new cell (and proposed variable) name. If you decide to keep it, you will have to change the variable in all of your Word documents so that compatibility is maintained. Pathagoras provides tools to do this, or you can just use standard Find and Replace tools to replace [Client Name] with [Client_Name].

(2) You can reject the change. You should then delete that line from the data collection screen (and delete the name from the named cell) to prevent the automatic processing of the term. Just complete the value by hand the next time you call up the IDB screen.

(3) A third, slightly more complex, and not necessarily recommended, option exists. You can keep both the Word variable and the Excel variable. You can do so by creating an Equivalency between the two In the Instant Database screen. Continuing with the example term, this would be done by placing "[Client_Name]" in the space to the right of [Client Name] in the variable list. When you are completing the form to personalize the document, simply click the red button that will be present when Pathagoras detects the equivalency.

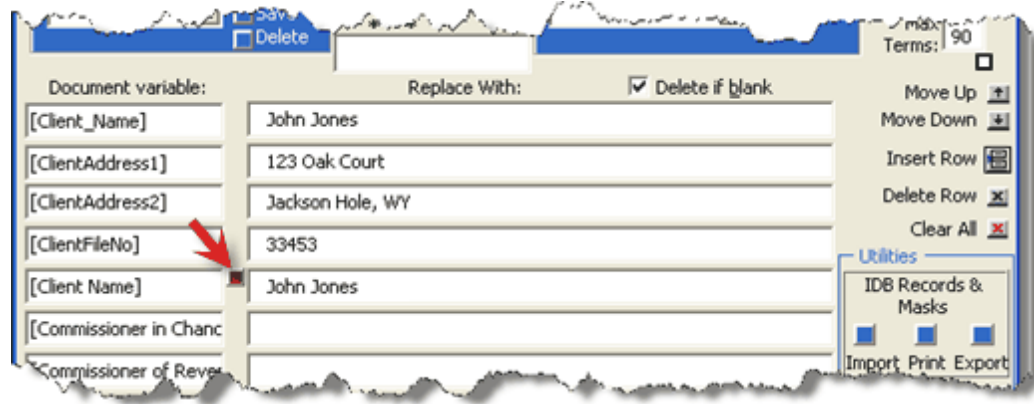
The value of the 'equivalent field' is transferred and replaces the equivalency statement.

Here is are some screen shots.



The equivalency function as it appears in an almost completed record.

[Client Name] is the equivalent of [Client_Name].



Press the red button to instantly transfer the value from the referenced cell to the current one. When replacements are made, both [Client_Name] and [Client Name] will be replaced with the desired value.

7.5 Multiple Choice and MultiChoice Variables

Multiple Choice variables and MultiChoice *star* variables are two tools used in Pathagoras for Word to provide quick options from which the end user can choose a proper answer. Using the tools provided in Pathagoras for Excel, you can do away with most of those variables in Word.

As a practical matter, however, not everything can be (or needs to be) collected using Excel forms. To the extent that you can eliminate making the choices in a 'complex' Word variable, you should. Just use a simple variable in your Word documents, and make the 'hard' or 'complex' decisions using Excel tools (if/then choices; lookup tables, etc.) Of course, if Excel is not otherwise feeding them, you can still keep other complex variables within Word.

7.6 Modifying an existing form

The steps described below discuss the three cell-naming techniques previously discussed. The examples are intended to illustrate and reiterate what you have learned, not to offer still more alternatives.

Perhaps you have a form in Excel with which you already capture data. Terrific. Now you can automate it for use with Pathagoras (Word).

The steps here are similar to the above 'from scratch' instructions, but you want to make sure that the names of the cells match the names in your IDB mask.

Manually: With a printed list of your variables in hand, manually name the appropriate cells with names of the variables. See [this link for how to manually name a single cell](#)¹².

We presume, since you are using an existing form, that descriptive names already reside in the cells adjacent (above, below, to the left or to the right) of the cell(s) that you have named and which will contain the value(s) for the variables you will transfer into the Instant Database system. If the descriptive names are themselves 'boring', consider the below Tip.



If the labels or descriptions that tell the end user what goes into the adjacent cell are simply a 'repeat' of the variable name, consider adding a more descriptive term. If you had ClientName in Column A as the lead in for naming the cell in Column B, once the cell is named, you can change the value in Column A to something quite meaningful and useful, perhaps: "Insert Client's Full Name Here:". Be sure to consider who is actually going to be completing the form. If you are sending the form to the client for him or her to complete, "Insert Your Full Name Here:"

Click the cell you want to name and then click a name from the drop down list. Pathagoras will present 4 choices reflecting the 4 ways that you may wish to use this variable.

Click in to the column immediately to the right of the one you just modified. click the same variable from the dropdown list, but this time, choose the <Insert as Cell Name> option. If the variable contains 'illegal' characters for cell-naming purposes (see Cell Naming Rules

See Naming rules below, however.

8 Creating a Matter Record

Exporting the data into an IDB Personal Data Record.

With the completed data entry form on the screen, click the "Create IDB Matter Record" button on the "Pathagoras for Excel" toolbar. The following screen will appear:

Figure 1. The default settings are "All named cells on current page, in top-to-bottom order"

You can pass the values of all named cells in the entire spreadsheet into the new matter record (the default). You can also limit the cells that will be captured to those that begin or end with a designated prefix or suffix.

Note the following additional choices/features:

(a) you can limit the cells that will be captured to those on just the current page, or a highlighted range on the current page. These choices are useful when you have created a 'cover page' or a 'summary sheet.' These sheets can contain personal data and capture (by reference) the important values from other pages. (Consider computing complex calculations on 'back' sheets and create references to the answers on the cover sheet.

(b) If you use the 'cover' or 'summary page' method, you can tell Pathagoras to order the results in the Matter record alphabetically (the default), or by the order in which the cells appear on the cover or summary page ("top to bottom" or "left to right"). So you can have full control over how the resulting IDB record will be created by a thoughtful design of the cover page.

(c) You can have Excel automatically add [brackets] to your terms so that they match exactly the variables in your Pathagoras (Word) system.

(d) If you were forced to 'add' underscore characters to comply with Excel's cell naming rules (those rules do not allow spaces), you can return those underscores to spaces before saving the values out as an IDB record.

After you have made your choices on the first screen, click the Next button. The following screen will appear whereby you can provide a name for the matter record. The 'default' name is the name of the spreadsheet. Change the name to anything you wish. An appropriate name would be the name of the client of customer. The name you type will be what will appear in the IDB "Matter Records" list when you display IDB.)

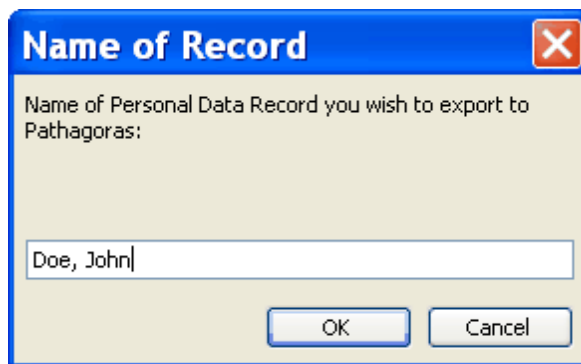


Figure 2. After "Export" is clicked, Pathagoras asks for a name. Provide a name as you wish for it to appear in the IDB "Personal Data Records" listing.

→ Note: Once the Matter Record has been created, it is immediately usable by Pathagoras IDB/Word and Pathagoras IDB/Excel. You can open Instant Database in either program, see and, if appropriate, edit the data. ←

9 Forms Management

Enter topic text here.

9.1 Locking and Protecting Form

Converting your work into a 'real' form in Excel: Locking and Protecting

In order to insure that a user will be filling in data in designated named fields, you must 'lock' the other cells, and then turn on 'protection.' (Locking and protecting cells make them unmodifiable.)

Further, by protecting and locking the cells you don't want your users to enter, the tab key will jump from one 'proper' cell to the next. (Otherwise, it marches inexorably to the right.)

To 'protect' a cell, click "Cell, Format, Protect" and check the lock box. Actually, the best way to accomplish this is to lock all cells en masse and then select the cells you want users to enter and unlock them. (If you are holding down the Ctrl button while you are clicking on cells, you can select many cells at the same time. You can also select groups of cells by 'painting' them with your mouse. You can also select a column or a row by clicking the number at the left or the letter at the top.

A cell marked 'locked' is not yet actually locked. You must formally 'protect' the worksheet before 'lock' is in effect. Click Tools|Protection|Protect Sheet to enable protection. Save the form. You are now ready to distribute it.

9.2 Copy one cell to another

As you are assigning values to cells, keep in mind that Excel makes it easy for you copy the value of one cell into that of another. There is no need to manually type an already existing value into any cell.

By way of example, let's say you want Sheet 1 of your Excel project to contain a summary of calculations made on Sheets 2 through 5. It is on Sheet 1 that you have named the various cells, and it is from Sheet 1 that you want to create the Matter record you want to use in Pathagoras for Word.

By Cell location:

Your objective is to 'copy' the results from one or more cells in Sheets 2 through 5 into the summary section of Sheet 1. To do so, highlight the first cell on Sheet 1 that is the 'target' cell. Press the "=" key to signal to Excel that you are creating an equivalency link. Now, simply navigate to the proper sheet and cell which contains the source data (the value that you want to place in Sheet 1). Press the Enter button and you are done. Repeat as often as needed to complete the summary section.

By Cell name:

The objective is the same but let's say that you have named the source cells on Sheets 2 through 5. To the extent that you can recall the names, you need only highlight the first 'target' cell on Sheet 1, press "=" and then type the source cell's name. Press the Enter button and you are done. Repeat as often as needed to complete the summary section.

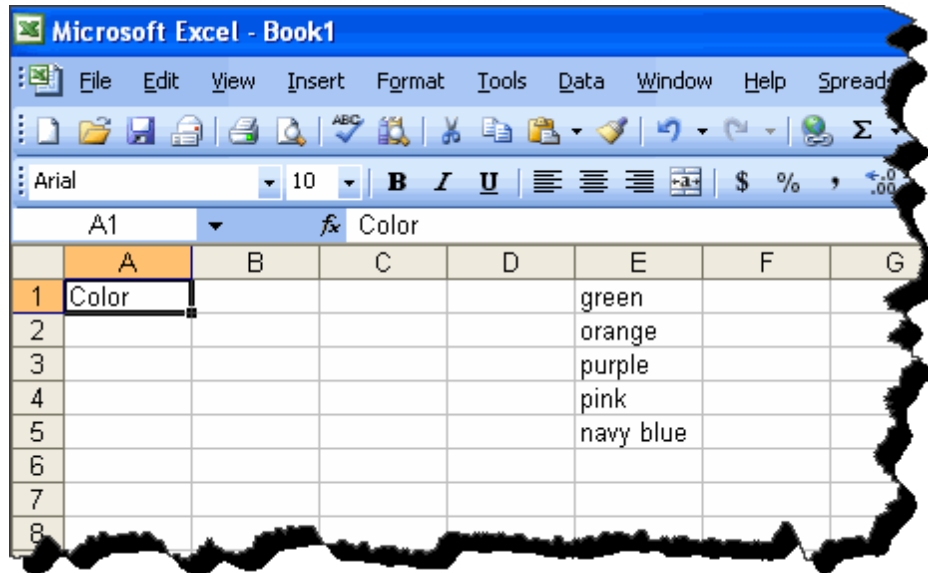
9.3 'Validation' (select from a list)

If you wish to limit the end user, in completing the value of a particular cell, to a particular set of values (let's say the only colors of the widgets you are selling are green, orange, purple, pink and navy

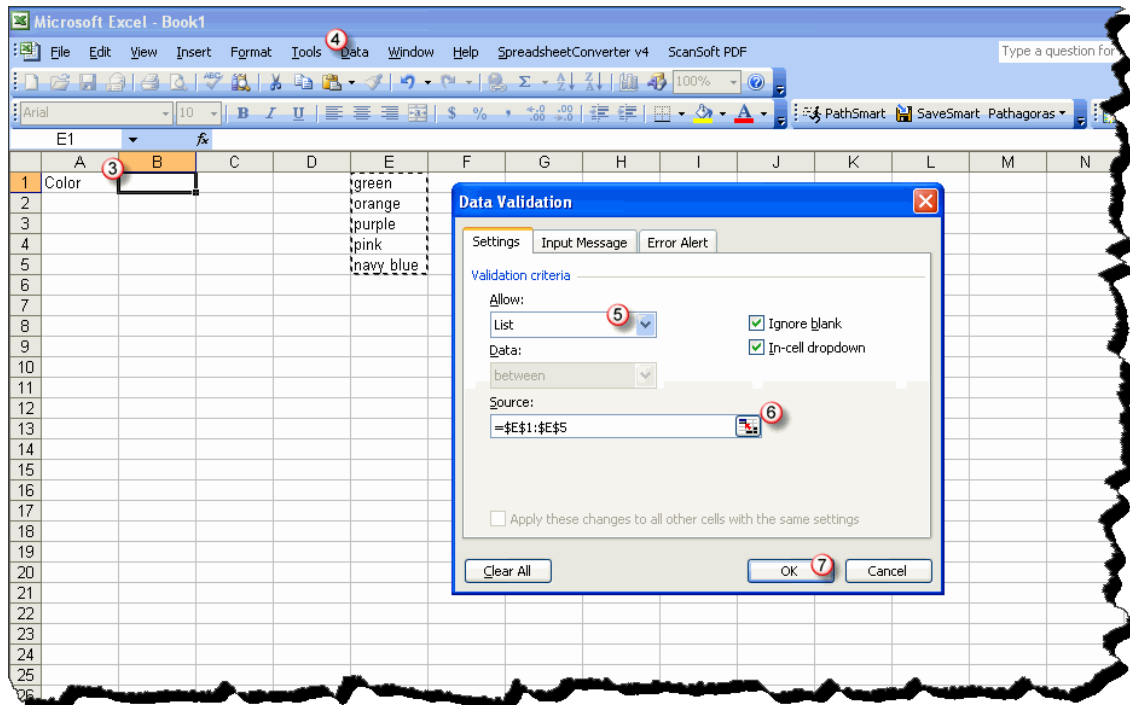
blue), you can create a validation rule for the cell, point

For example, you can type a list into any other column of your spreadsheet and use that list to provide the end user selection choices. Here is a hands-on example.

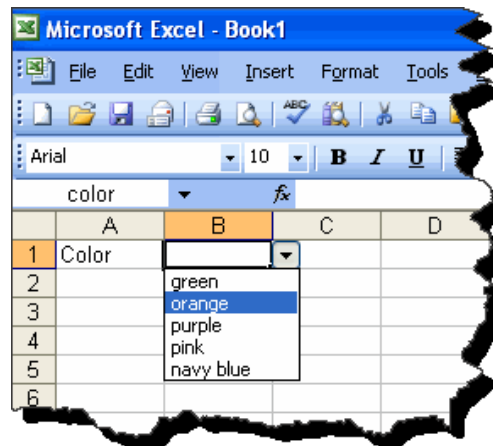
1. Type the list of colors in Column E of your spreadsheet a list of colors. One color per row. (The instruction as to location is for convenience sake only. You can type the list anywhere.)
2. In cell A1, type 'Color'. It actually can be any word you want. This will serve solely as the 'title' or 'label' for what you are going to accomplish in the next step. This is what you should have thus far:



3. Click inside of cell B1 (where you want the user to provide the 'answer'). (See image below.)
4. Click 'Data' and then 'Validation' from the Excel tool bar.
5. The Data Validation screen now appears. Click down the 'Allow' list and select the 'List' entry. (This just means that you want to present the end user a 'List' of choices from which to choose.)
6. Click in the Source box. You will now tell Excel where the list appears in the spreadsheet. You can either type "=E:E" (the equal sign and colon are necessary elements) which tells Excel to use 'Column E') or you can click the cell selection button at the right and highlight the area of the spreadsheet that contains your list of colors. (You can also type, let's say, "=\$E\$1:\$E\$5" to limit the scope to the first 5 rows of column E.) (The '\$'s are not necessary, but Excel will always add them. "=E1:E5" is a functional equivalent.)



7. Click OK to confirm. The Data Validation screen will disappear.
8. Now click in cell B1. Notice that it now has a dropdown button at its right. Click it and you will see the colors that are available for selection.



In addition to the Validation rules, you can create VLookup and HLookup (vertical and horizontal) tables and rules. Excel provides the guidance for implementing these more elaborate tools. But spending a little bit of time designing and using them can save you a tremendous amount of time in the future.

9.4 Lookup Tables

It is easy to use a lookup table to fill in a value of a particular cell.

9.5 Posting Form to Internet

You can readily post any form you create locally to the Internet as a pure HTML form. There are several programs out that can convert your Excel spreadsheets to HTML ready forms. Here is one: [SpreadSheet Converter](#)

Here is what an on-line spreadsheet might look like (if you are viewing this as a live PDF form with a live Internet connection, click the image and you will be taken to the live form.)

The screenshot shows a web browser window displaying an online form. At the top, there are three buttons: 'Reset', 'Submit', and 'Print'. Below them is the title 'Intake Sheet, Regional Law Center'. A paragraph of text explains that the form was created from an Excel spreadsheet and is a pure HTML form. The form itself is organized into three main sections, each with a distinct background color: a cyan section for 'Court Data', a blue section for 'Marital Information', and a green section for 'Attorney Name'. Each section contains several text input fields. The 'Court Data' section includes fields for Plaintiff Name, Defendant Name, Court locale, Case Number, and DCSE Case Number. The 'Marital Information' section includes fields for Date of Marriage, Place of Marriage, Date of Separation, and Date of SepAgree. The 'Attorney Name' section includes fields for Attorney Name and Opp. Atty Name. The form also includes fields for Date, Client Name, Street Address1, Street Address2, City, ST ZIP, Home Phone, Cell Phone, Work Phone, and Spouse Name. Example phone numbers are provided for the Home, Cell, and Work Phone fields. The browser's status bar at the bottom shows 'Done' and 'Internet'.

This is a sample of a 'plain vanilla' Excel form converted to a web based data collection form.

The form can be as simple of as fancy as you desire.

Whatever you can create in Excel can be easily converted and posted to the Internet.

You can direct your customers (actual or potential), clients, patients or inquirers to this form. They fill it out (shifting the accuracy of form completion from you to the customer, etc.) When the customer presses Submit, the data is automatically emailed to you. When you receive the email copy of the data, you can readily convert it into an Instant Database record.

10 Support

10.1 Technical Support

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.



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Innovative Software Products of VA, LLC
Roy Lasris, President

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Website: www.pathagoras.com

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 +1 (757) 877-2244 (USA) (direct line, not tollfree)
 +1 (757) 898-7374 (evenings, weekends)

Address:

117 Chisman Landing
Seaford, VA 23696 USA (I read all mail)

Reporting a 'bug':

We ask you to report any and all program 'bugs' you encounter.

- Most error messages that Pathagoras and Word generate are rather generic in nature. If you receive an error message while Pathagoras is in operation, and can duplicate it at will, please send us a list of the steps that will generate the error. If we can duplicate it on our end, we can come up with a much quicker fix.
- We would also greatly appreciate your sending any screen shots that may help us to better describe 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.)

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 preferred meeting tool 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.)

- If you have a Remote Assistance program that you would prefer that we use, just let us know.

GoToMeeting® is a registered trademark of the Citrix Corporation

10.2 Non-technical Support

Pathagoras Author & Staff For Sale!

I am for sale! Yes, me personally, and my staff, too.

We are available to help you set up Pathagoras, establish your Pathagoras network if you have multiple licenses, create or refine your books and libraries, etc.

- **Let us Pathagorize You:** If you simply do not have the time or the energy to Pathagorize your forms and create a system, we can handle it all for you. We have skilled and talented 'Pathagorizers' on staff who can quickly respond to your every request.
- Send one or more of your current systems. We will set up a Pathagorized model system in return. What you will get back is a complete, immediately usable, book. We will also send you instructions on how to place it onto a new or existing library shelf. Since the returned material will be a collection of standard Word documents, you will be able to augment or freshen the text on your own as needed.

Our rates are posted on the website, or call us for a quote. Your savings in future document assembly time will more than recapture the investment.

(If you want to take us up on this offer, we suggest that you send us just one of your systems, not all of them. When you get it back, study what we did and how we did it. Hopefully, then, you will feel so confident in how simple and easy it really is that you will attempt to 'Pathagorize' the next system yourself.)

- **Private Lessons:** If you choose not to read the manuals (I hate reading manuals too), you can simply 'buy' me to provide extended lessons and some 'on-site' (via GoToMeeting) guidance on how to get set up and fully operational with Pathagoras. Put your whole office staff in front of a computer and a speaker phone and we will be all set. And when you consider how far I can get in that time, that can be quite a deal for you.
- **"Will you travel?"** Heck yes! I would love to! (Get me out of my law office, please!) Of course, the airplane ticket and accommodations would be on you. My on-site charges are a bit higher, but the work that I could accomplish in that day or two (setup and training) should make the investment very worthwhile.

10.3 Uninstalling Pathagoras for Excel

Uninstalling Pathagoras

If you need to uninstall Pathagoras for Excel, do must navigate to the XLStart folder into which you originally installed the module and deleting the "pathagoras.xla" file.

1. The XLStart folder most likely is:
C:\Program Files\Microsoft OfficeXX\XLStart
2. Delete any 'pathagoras.xla' file present.

If you cannot find 'pathagoras.xla' in the manner described above, follow these steps:

1. Make sure you have exited Excel.
2. From your main Windows screen, press the 'Start' button.
3. Press 'Find.'
4. Press 'Files or Folders.'
5. Type 'pathagoras.xla' in the 'Named' field.
6. Make sure that the 'Look in' field is set to your C: drive, and 'Include Subfolders' is checked.
7. Delete any 'pathagoras.xla' files that are displayed.

10.4 Help System Improvement Project

Please help us to make this Help System the best it can be.

- If you find an error, please copy a snippet of the text containing the error and shoot it over to us in an [email](#).
- If a topic that you would like to see is missing or misplaced or not indexed appropriately, please [let us know](#).
- If you were looking for a piece of information under a name or topic where you thought it might be and did not find it, [please write](#) so that we can add that link.
- If you have any suggestions whatsoever, [please write](#).

Thanks.

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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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