

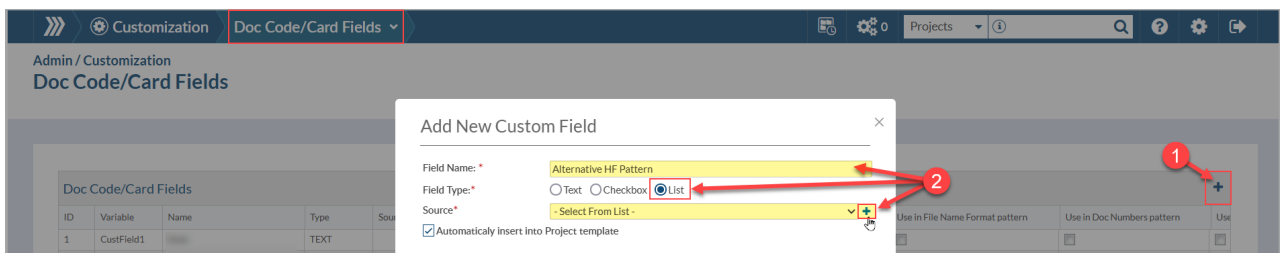
IF Statement for Header/Footer

10/01/2025 2:35 pm MDT

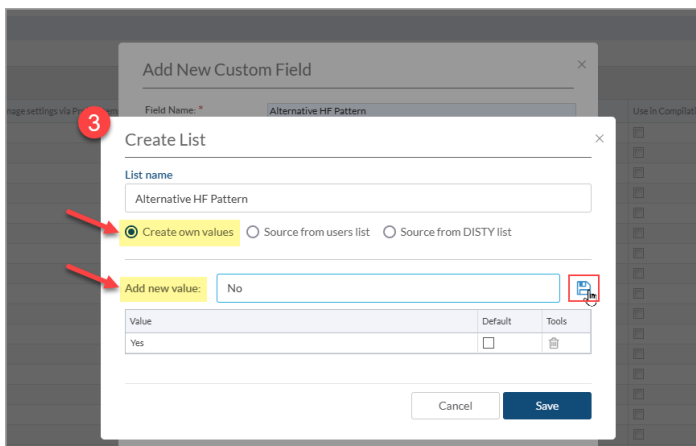
If statements can be used for header/footer patterns to draw different values for different conditions (e.g., drawings require a different heading than all other documents). In these situations, creating a custom doc code/card field can provide additional functionality/flexibility for the header/footer patterns.

To begin, navigate to **System Menu > Customization > Doc Code/Card Fields**.

1. Create a custom doc code/card field by clicking the "+" icon in the top right of the grid.
2. Name the custom field, set the field type to "List," and create a new list.



3. Name the list, select the "Create own values" option, and create a "Yes" and a "No" value by typing them into the "Add new value" field and clicking the save button. Once both values are added, save the list. (Note: the "No" value is optional).



4. Once the list source is set to the new list, click save.
5. Navigate to the project and enable the new field to be used (Project Menu > Set Up > Project Configuration). From the "Fields & Equipment Types" tab, expand the "Doc Code/Card Fields" section and click on the arrows icon to enable the custom field (changes will auto-save).

Pump Project (1234) Project Configuration

Set Up
Project Configuration

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting Info

Doc Codes and Cards Project

Doc Code / Card Fields

Import Doc Code / Card Field

Display Name Variable	Type	Current Status	
Note CustField1	Text	Enabled	≡
Discipline CustField2	Checkbox	Enabled	≡
Description CustField3	Text	Enabled	≡
Area CustField4	Text	Enabled	≡
Unit CustField5	Text	Enabled	≡
Requisition CustField8	Text	Disabled	≡
Comment/Change Log CustField13	Text	Disabled	≡
Alternative HF Pattern CustField19	List	Disabled	≡ Disabled. Click to Enable

Project Main Fields

6. Navigate to the code list (Project Menu > Cards > Code List) and set the values for the new custom field. Set the required code(s) to "Yes" and all other codes to "No." (Note: if the "No" value was not created, all other codes can be left blank (showing "- Select -"))

Pump Project (1234) Code List

Cards
Code List

Grid row colors

Tools	Doc Code	Doc Code Name	Level	Alternative HF Pattern	Stage List	Type	Est. pgs	Reference
	A01	Seller Document Register	Order	No	IFA	SDI Report		AO: After
	B01	General Arrangement Drawings	Tag No. (TE)	Yes	IFA	Generated (Sub-Supplier)	2	AO: After
	B02	Misc Drawings/Descriptive	Manual	- Select -	IFA	Generated (Sub-Supplier)	2	AO: After
	P01	Shipping, Handling and Storage Procedure	Sub-Supplier	No	IFA	Generated (Sub-Supplier)	2	AO: After
	Q02	Quality Control Plan and Inspection & Test Plan	Manual	Yes	IFA	Generated (Sub-Supplier)	2	AO: After
	R04	Manufacturer's Record Book	Manual	No	IFA	Generated (Sub-Supplier)	2	AO: After

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7. Navigate to the project header/footer settings (Project Menu > Set Up > Main > Headers and Footers) and set the header/footer pattern as required following this general formula: IF ("<CustomFieldName>="Yes", "<ValueIfYes>,"<ValueIfNo>").



Example:

All cards generated from drawing codes require the Item/Model number(s) in the header. If not a drawing, the PO number should be displayed in the header. The custom field name is "Alternative HF Pattern."

In this example, the formula would be set as follows:

Header text

IF("<AlternativeHFPattern>="Yes","<ItemModelList>","<PONumber>")



+ Add variable

Once the values have been set, click "Save Project"

