## **IF Statement for Header/Footer**

05/02/2025 3:05 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.

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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*).

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4. Once the list source is set to the new list, enable the field setting for "Header/Footer Pattern" and click save when complete.

Field Settings
Use in:
File Name Format Pattern
Doc Numbers Pattern
Compilation Bookmarks/TOC Pattern
Compilation Sorting Card Pattern
Allow Manage Settings via Project Template

5. Navigate to the project and enable the new field to be used (Project Menu > Set Up > Project Template). In the "Doc Code/Card Fields" section, click on the arrows icon to enable the custom field (*changes will auto-save*).

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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 -")*)

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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>")</ponumber></itemmodellist></alternativehfpattern>	+ Add variable
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Once the values have been set, click "Save Project"