

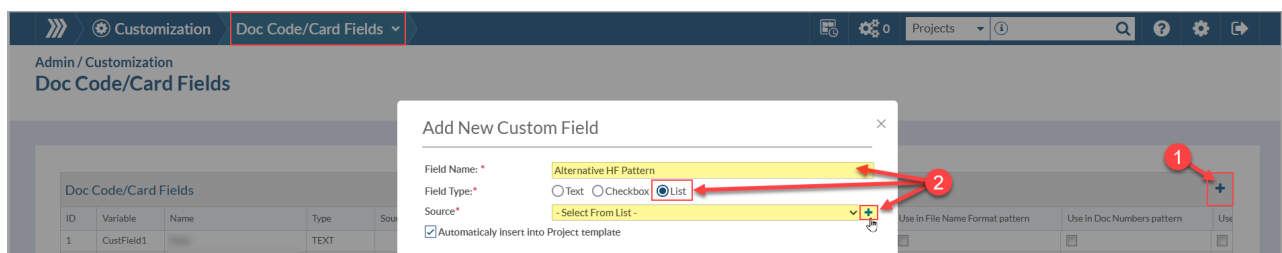
IF Statement for Header/Footer

05/02/2025 3:05 pm MDT

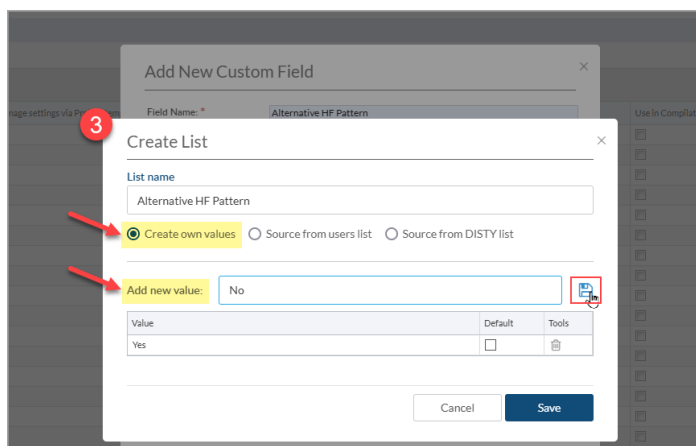
If statements can be used for header/footer patterns to draw different values for different conditions (e.g., drawings require a different heading than all other documents). In these situations, creating a custom doc code/card field can provide additional functionality/flexibility for the header/footer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

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

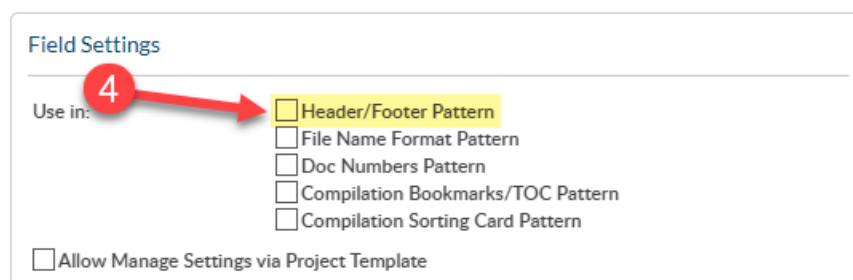
1. Create a custom doc code/card field by clicking the "+" icon in the top right of the grid.
2. Name the custom field, set the field type to "List," and create a new list.



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, enable the field setting for "Header/Footer Pattern" and click save when complete.



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*).

Pump Project (1234) **Project Template** Projects 0

Set Up
Project Template: Omega: Default Project Fields Template (system)

Project Settings
Doc Code/Card Fields
Major Tag Field
Additional Unit Types
Combination Fields
Equipment Fields
Project (Main) Fields
Doc Code Queries
Compilation / Package Presets

Doc Code/Card Fields

Add Field to Template

| Variable | Name | Type | Source | Settings | Use in Patterns | | | | | Current Status | | |
|-------------|------------------------|----------|-------------------------|----------|-------------------------------------|------------------|-------------|---------------------------|--------------------------|----------------|-------|------|
| | | | | | Header/Footer | File Name Format | Doc Numbers | Compilation Bookmarks/TOC | Compilation Sorting Card | Enabled | Order | Icon |
| CustField1 | Note | Text | | Q | | | | | | Disabled | 11 | |
| CustField2 | Discipline | Checkbox | | Q | | | | | | Disabled | 11 | |
| CustField3 | Equipment Type | Text | | Q | | | | | | Disabled | 11 | |
| CustField4 | Area | Text | | Q | | | | | | Disabled | 11 | |
| CustField5 | Unit | Text | | Q | | | | | | Disabled | 11 | |
| CustField19 | Alternative HF Pattern | List | Alternative H/F Pattern | Q | <input checked="" type="checkbox"/> | | | | | Enabled | 11 | |

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 |

No more pages Show on page: 50

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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"