

Osprey Approach: Use ASK and IF Statements

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Using IF and ASK statements within your Osprey documents can help generate personalised letters, reducing time and costs of having to manually amend letters. This guide will show you how to add them into your documents

IF statements use criteria to display specific words, phrases or even paragraphs. An example could be generating a letter in a conveyancing matter. Depending on if the property is Leasehold or Freehold, different wording can be displayed within a specific letter, removing the requirement of having multiple versions of the same document.

ASK statements capture information at the point of the document being generated. This could be used to insert the user's name into the document or ask if they require the header and footer to be displayed when printing to pre-headed paper.

ASK statements are generated by Microsoft Word and may appear behind any open program windows
If using ASK statements, you may need to minimise any open windows to display the ASK prompt.

Designing a Document

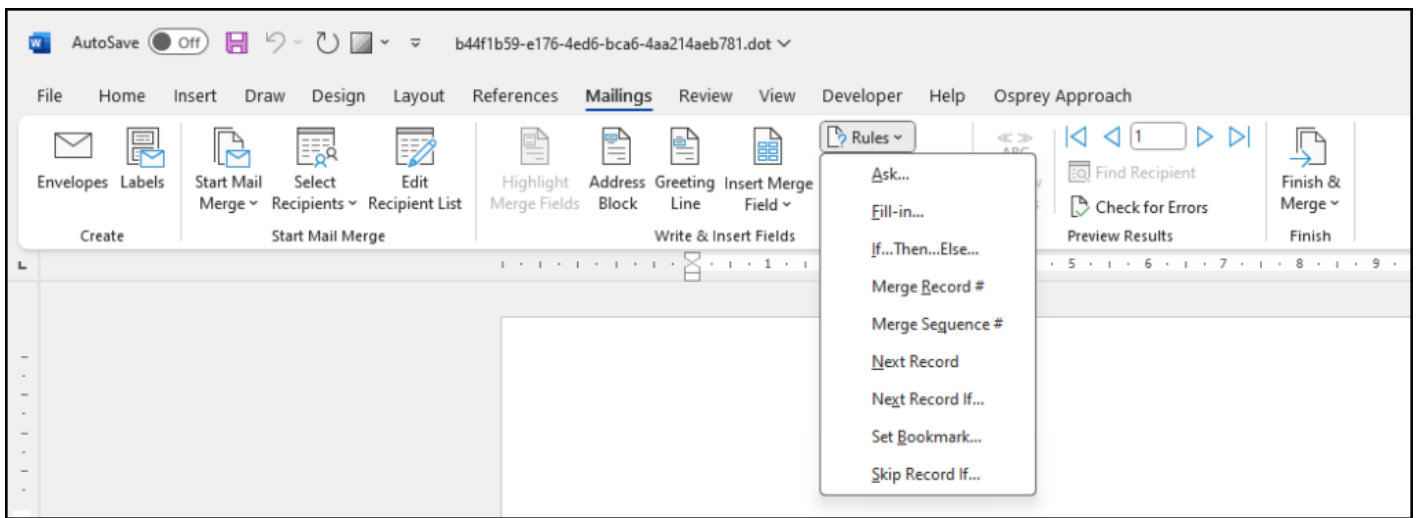
To incorporate IF and ASK statements into your letter templates, you must have access to be able to design Standard letters from Supervisor > Case Management > Standard Letters.

To be able to modify your document, you must open the template in design mode.

Adding IF Statements

If you are adding an IF statement, you must have the relevant field linked to your document before creating the IF Statement.

Left click within your document where you wish for the IF statement to start.
Then navigate to Mailings > Rules within the ribbon at the top.



Select If...Then...Else. The following screen will come up.

 A screenshot of the 'Insert Word Field: IF' dialog box. The 'Field name:' dropdown is set to 'RC_PROPDETAIL_FW_FHLH'. The 'Comparison:' dropdown is set to 'Equal to'. The 'Compare to:' text box contains 'Freehold'. The 'Insert this text:' text area contains 'This property is a freehold'. The 'Otherwise insert this text:' text area contains 'This property is a leasehold'. At the bottom right are 'OK' and 'Cancel' buttons.

Select the field name from the dropdown list. In the example above, it will check if the value of the dossier field is Freehold. If it is, it will display the text in the top box. If the field is not Freehold, it will display the text in bottom field.

To display no text, place a space into the relevant field.

Click OK.

Select Alt + F9 to toggle merge fields. You can now see how our IF statement operates.

```
{ IF { MERGEFIELD RC_PROPDETAIL_FW_FHLH } = "Freehold" "This property is a  
freehold" "This property is a leasehold" }
```

Nesting IF Statements

You can also nest IF statements, by replacing the text within the last "quotation marks".

```
{ IF { MERGEFIELD Field Value } = "1" "One" "{ IF { MERGEFIELD Field Value } = "2" "TWO"  
"Three }" }
```

The above example will check if the Field ID equals 1.

If it is, it will display "One", else it will check if Field Value = 2.

Then, if the Field Value equals 2, it will display "Two". If not, it will display "Three".

Multiple IF Statements

You can also use IF statements to pull through text only if criteria are met.

```
{ IF { MERGEFIELD Field Value } = "Yes" "Paragraph One" "" }  
{ IF { MERGEFIELD Field Value } = "No" "Paragraph Two" "" }
```

By not entering anything in the Else box, you can have text to display only if the criteria has been met.

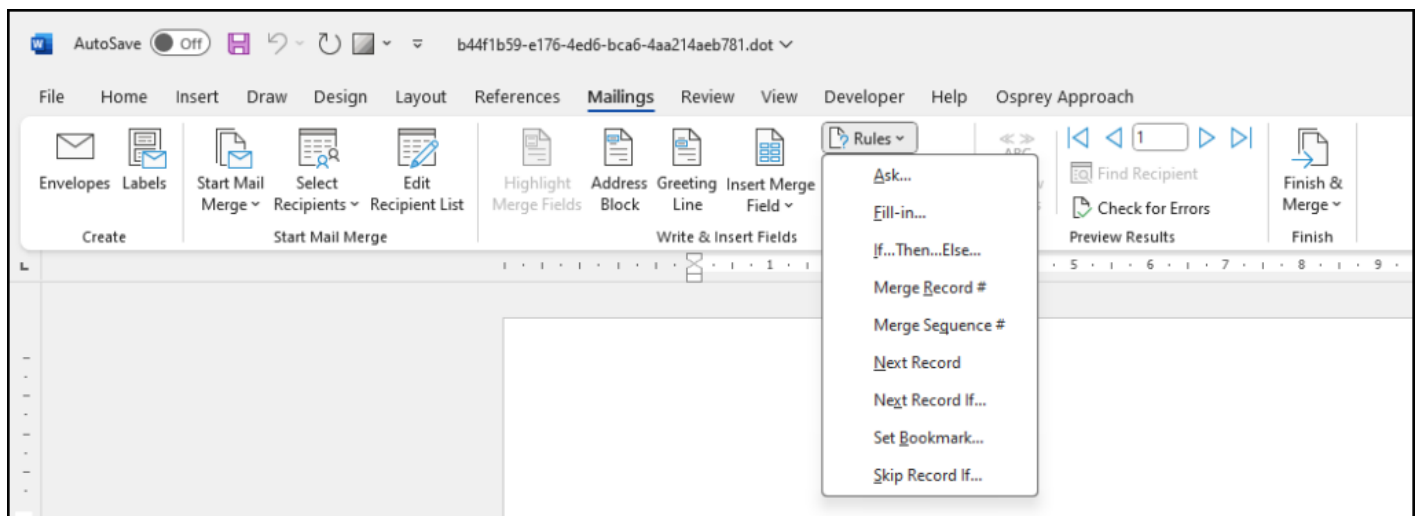
In the above example, Paragraph One will only appear if the field equals Yes.
If it equals No, it will display Paragraph Two.

If the field does not hold Yes or No, neither text will be displayed.

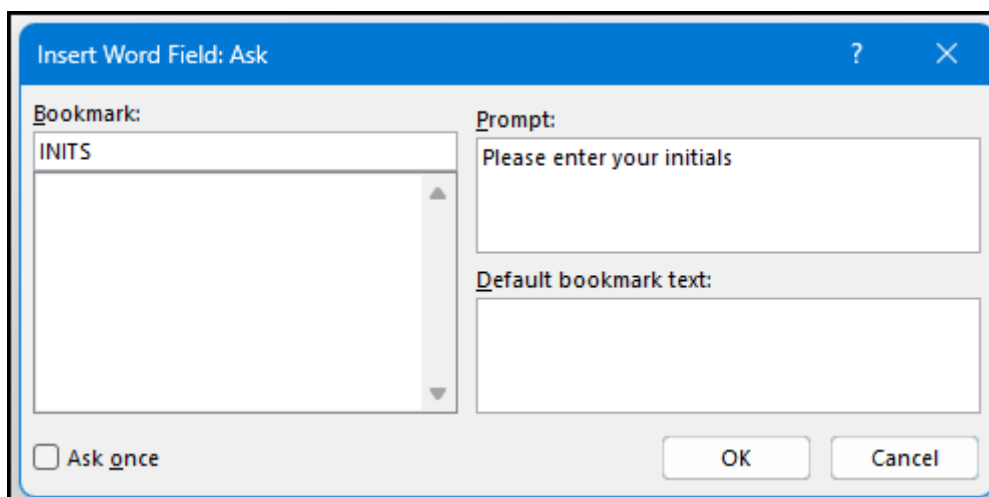
ASK Statements

To add an Ask statement into your document, open your document in design mode.

Left click to place your cursor at top of the document, and from the Word Ribbon at the top, navigate to Mailings > Rules and select Ask...

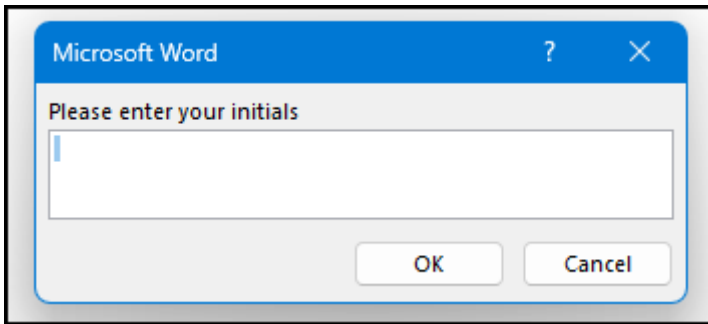


This will open a box which will allow you to create an ask field.



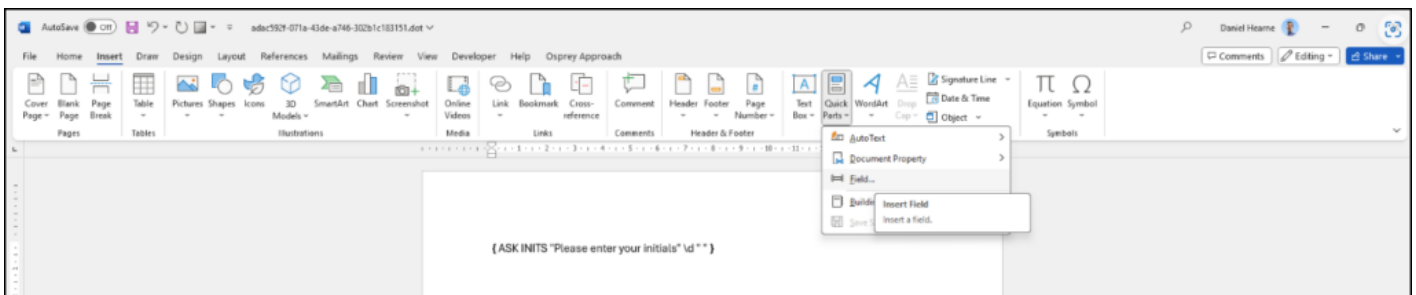
- In the Bookmark box, enter a name which the field will be known by.
In our example, we will ask for the user's initials, so we have used the bookmark "INITIS"
- In the Prompt box, enter the question which will appear to a user who opens the letter.
In the above example, the prompt will ask "Please enter your initials"
- In the Default Bookmark Text box, enter a space if you do not wish anything to show up as default.
If there is any default text you wish to show, enter it here.

Once those have been completed, click on OK. This will bring up an example of what the ask field will look like to a user. Click OK on the example to return to the document.



With the Ask question created, you will need to add the reference to display the results of the Ask field within your document.

Place the mouse cursor where you wish the information to be displayed, then navigate within the Word Ribbon to Insert > Quick Parts > Field.



This will open up a new window. Ensure Categories is set to (All). Scroll down the Field Names and select Ref.

Field ? X

Please choose a field

Categories: (All) v

Field names:

- NumPages
- NumWords
- Page
- PageRef
- Print
- PrintDate
- Private
- Quote
- RD
- Ref**
- RevNum
- SaveDate
- Section
- SectionPages
- Seq
- Set
- SkipIf
- StyleRef

Description:
Insert the text marked by a bookmark

Field Codes

Field properties

Bookmark name: (none) INITs

Format: (none) v

Field options

- ☐ Number separator:
- ☐ Include and increment reference numbers
- ☐ Hyperlink to paragraph
- ☐ Paragraph # from marked paragraph
- ☐ Relative position of paragraph
- ☐ # of paragraph in relative context
- ☐ Suppress all non-delimiter chars
- ☐ Paragraph # in full context
- ☐ Preserve formatting during updates

OK Cancel

The Bookmark name will display a list of all our bookmark IDs. Select the relevant one, then select Ok.

The field will now display in your document.

{ ASK INITs "Please enter your initials" \d " " }

{ REF INITs }

Make any other changes, then close and save the letter.

Supervisor > Case Management Setup > Standard Documents > > Standard Document:Ask Document

Design Document Preview Document

Click Preview Mode in Osprey to check that the field has worked, and the reference is bringing through the information.

