Merge codes

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Introduction to F2 Merge Codes

F2 Merge Codes is an add-on module that supports the merging of data from F2 with Microsoft Word templates. The add-on simplifies the creation of standard documents and streamlines the process of creating multiple identical records and emails for different participants.

F2's participant register and metadata fields contain merge fields with information. Using merge codes, this information can be retrieved and inserted directly into documents. This allows users to add addresses, case titles, and other information quickly and efficiently, which in turn reduces the risk of errors and improves the quality of produced documents.

Merging is made possible using document templates, which are added to records. These templates contain one or more merge codes, and the codes determine which data are retrieved from merge fields in either F2's participant register or metadata fields.

The following instructions require familiarity with F2 Basics and the use of templates in F2.

Merge codes

A merge code is the code written in templates in place of the desired data that is retrieved from merge fields. Merge codes are always one of three general types:

- Codes retrieving metadata on records.
- Codes retrieving metadata on cases.
- Codes retrieving participant data used when copying records.

The merge codes follow a specific syntax. Every code starts with a "$" followed by text specifying the desired type of code.

For example:

- $dossier for record information.
- $case for case information.
- $mergeparty for merging information from multiple participants on copies of records.

The type is followed by the name of the desired merge field, and the code is finalised by another "$".

The merge code's parts are linked together with "_". For example, to insert the responsible user for a record, the corresponding merge code would look like this:

- $dossier_responsiblename$

NOTE Merge codes must follow the above syntax to work as intended. Further examples of correct merge codes can be found in Merge field examples.

Organisations using F2 Task Guides will also be able to retrieve data from related merge fields using the prefix $case_fielddata.

Merge codes referring to empty data fields will be removed when generating documents so any generated document will be free of codes. Please note that this does not apply to $mergeparty codes.

Merge codes can also be used in combination with the F2 Phrases (documentation available in Danish) to merge information into standard texts.

Merging with templates

F2 Merge Codes makes it possible to automatically merge data from F2 with templates for Microsoft Word. Create templates directly from the main window on the “Settings” tab by clicking on the **Document templates** menu item.

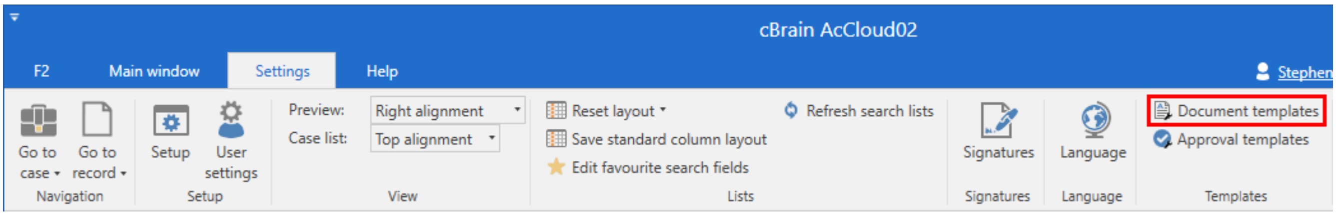


Figure 1. Accessing templates from the main window

The “Templates” dialogue offers an overview of existing templates available in F2 and the option of creating new templates.

Create a new template by writing its content in an editor outside F2 and then importing the document via the “Templates” dialogue. F2 Merge Codes supports the following types of files: DOTX, DOTM, DOCX, and DOCM.

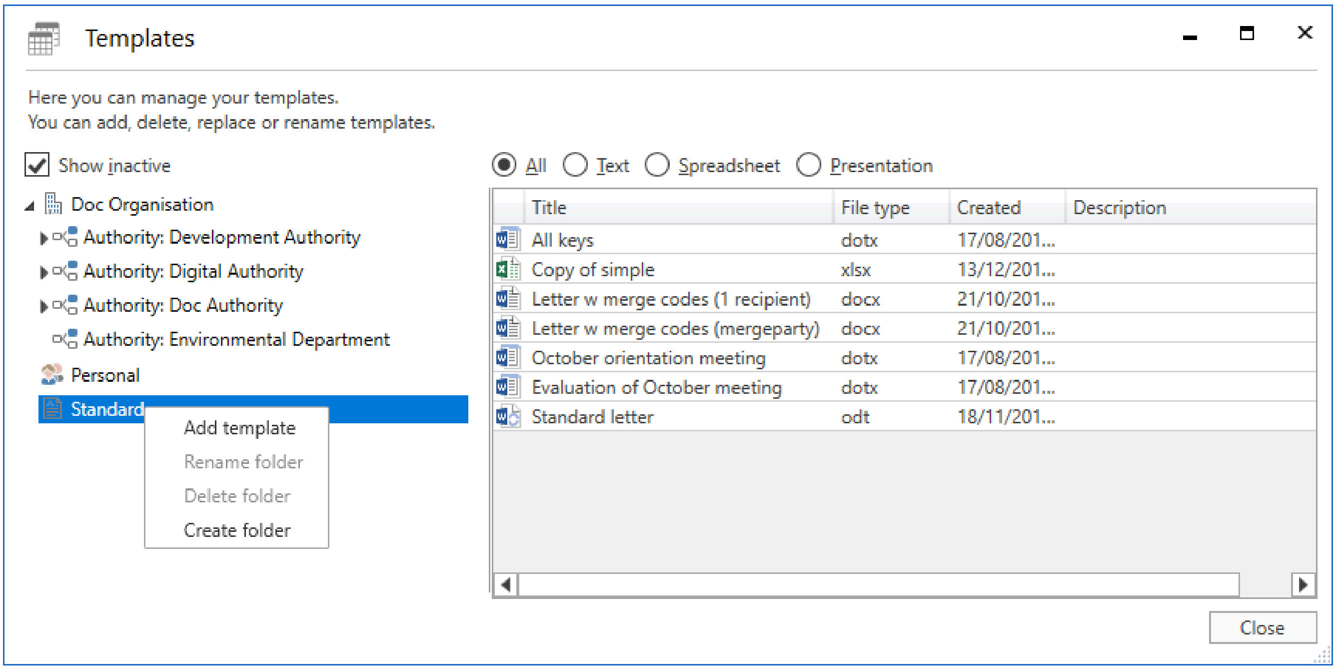


Figure 2. The “Templates” dialogue

Right-click on a folder to add a new template. Any user can add templates to their personal and their unit’s folders, while users with the “Template administrator” privilege can add templates that the entire organisation can access and use.

New document from template

Templates with merge codes work much the same way as regular templates. Attach the template to a record by clicking on **New document from template** in the record window ribbon. When the document template is attached, F2 immediately replaces all merge codes with the corresponding information retrieved from the specific record and its participants.

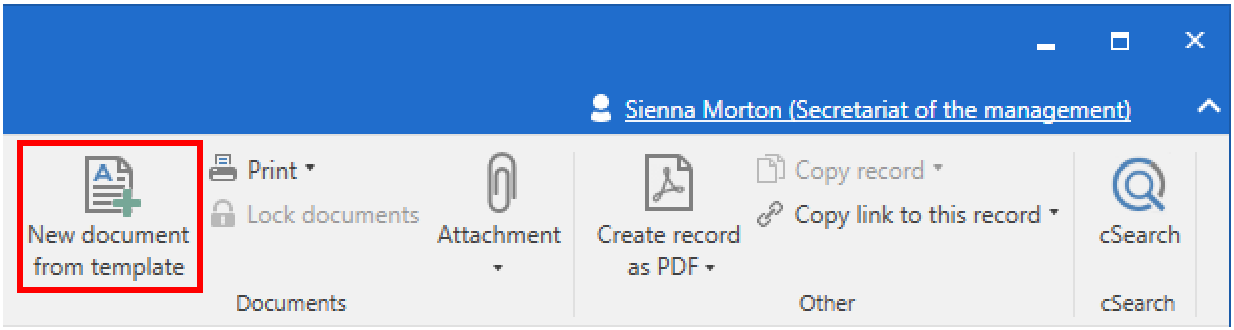


Figure 3. "New documents from template" in the record window

NOTE	Data from records and cases are merged immediately when a document from a template is attached. It is therefore important to ensure that all relevant information is already saved on the record and the case before attaching the template. Later changes to the metadata will not be merged with the generated document.

F2 will display a warning dialogue if a template containing merge fields is attached to a record with unsaved metadata (e.g. "Record participants"). This dialogue prompts the user to save any changes to the record before attaching the template.

The reason for the warning is that the database has not been updated with the latest information from the record. The database is only updated whenever a record or a case is saved. F2 displays a similar warning when a user attempts to attach a template to a record while editing it, as any unsaved changes will not be merged with the template.

Disable template merging

The merging of data with document templates can be disabled for specific templates in F2. This is useful if the merging fails, but it is necessary to create the document regardless. Click on **Document templates** in the ribbon of the "Settings" tab. Right-click on the relevant template and select **Properties** to open the "Document properties" dialogue. From here, the merge engine can be changed to "None" as shown in the example below.

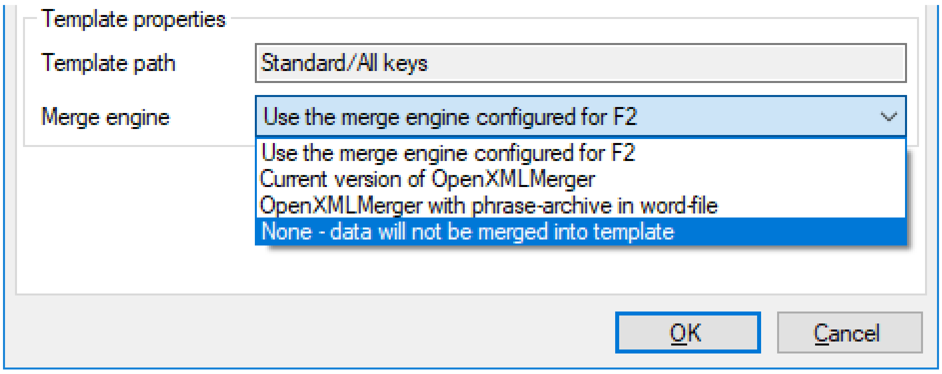


Figure 4. Template properties in the "Document properties" dialogue

Example of merging data for a letter

The following example demonstrates how merge codes can be used in a standard letter with a single recipient. The template for the letter contains a number of merge codes listed in the table below.

The “Merge field” column contains the names of the fields in the database (metadata), and the “Description” column describes the content of the corresponding metadata field.

Merge field	**Description**
dossier_party_1_name	Recipient’s name
dossier_party_1_address1	First line of recipient’s address
dossier_party_1_postalcode	Recipient’s postcode
dossier_party_1_city	Recipient’s city
dossier_sendername	Case manager’s name
case_f2casenumber	Case number

The corresponding merge codes are created by adding “$” before and after the merge fields' names. Below is an example of a letter template with a single recipient (record participant):

$dossier_party_1_name$
$dossier_party_1_address1$
$dossier_party_1_city$
$dossier_party_1_postalcode$

Date: 16th of April 2020
Case number: $case_f2casenumber$

Dear $dossier_party_1_name$,

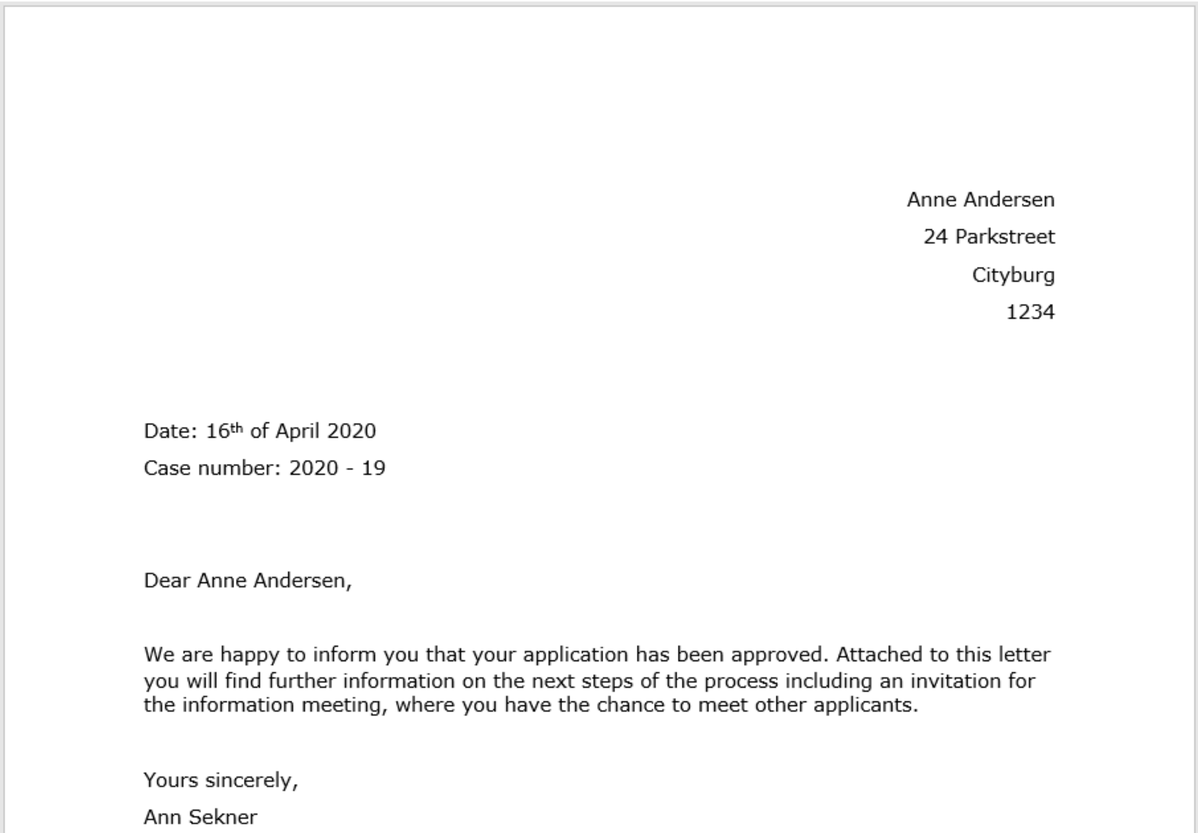
We are happy to inform you that your application has been approved. Attached to this letter you will find further information on the next steps of the process including an invitation for the information meeting, where you have the chance to meet other applicants.

Yours sincerely,
$dossier_sendername$

Figure 5. Letter template with merge codes for a single recipient

A letter template added to a record with the four following metadata fields will produce a letter like in the figure below:

- Case manager = Ann Sekner
- Case number = 2020 - 19
- Participant = Anne Andersen
- Participant’s address = 24 Parkstreet, 1234 Cityburg



Anne Andersen
24 Parkstreet
Cityburg
1234

Date: 16th of April 2020
Case number: 2020 - 19

Dear Anne Andersen,

We are happy to inform you that your application has been approved. Attached to this letter you will find further information on the next steps of the process including an invitation for the information meeting, where you have the chance to meet other applicants.

Yours sincerely,
Ann Sekner

Figure 6. Single recipient letter generated from letter template with merge codes

Copy to case participants (multiple recipients)

A letter template can be used for generating multiple identical letters to different recipients simultaneously. The process differs slightly from letter templates for a single recipient. This is partially due to differences in merge codes and to the structure of the process.

Use this function when sending the same information to a large number of participants. The following sections describe this process of generating letters.

Generating individual letters for multiple recipients

First add the relevant participants to the case in question. The participants and their information must exist in F2's participant register. The participants are added by entering their names in the "Case participants" metadata field.

The figure below shows the case window with two participants added to "Case participants".

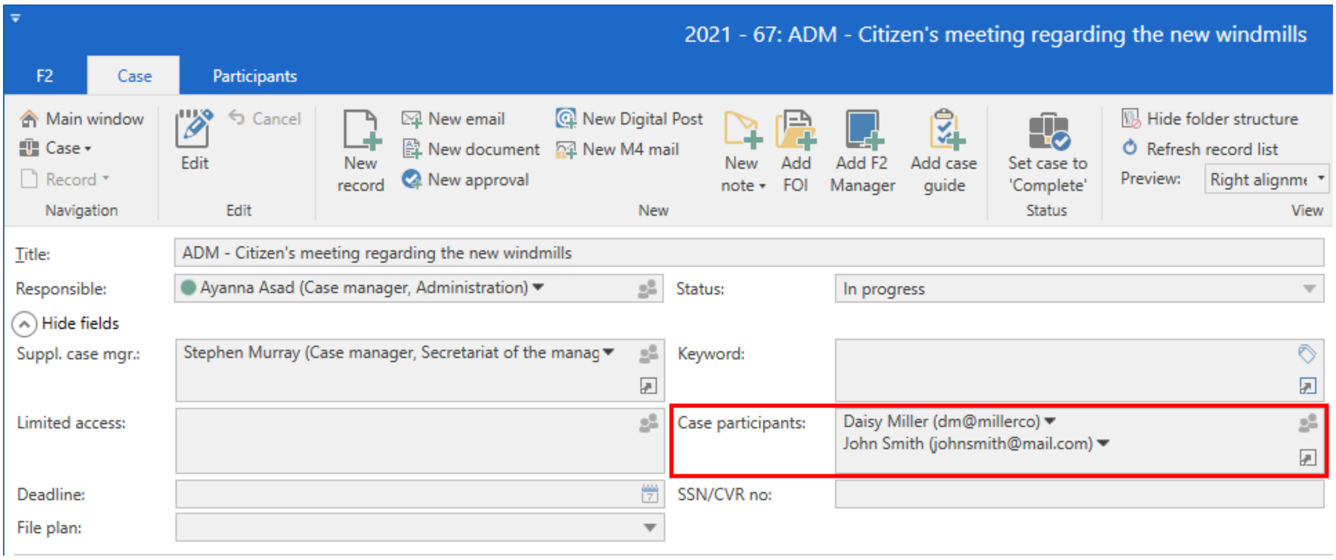


Figure 7. Examples of participants in the "Case participants" field

Choose a template containing merge codes for this particular type of merging.

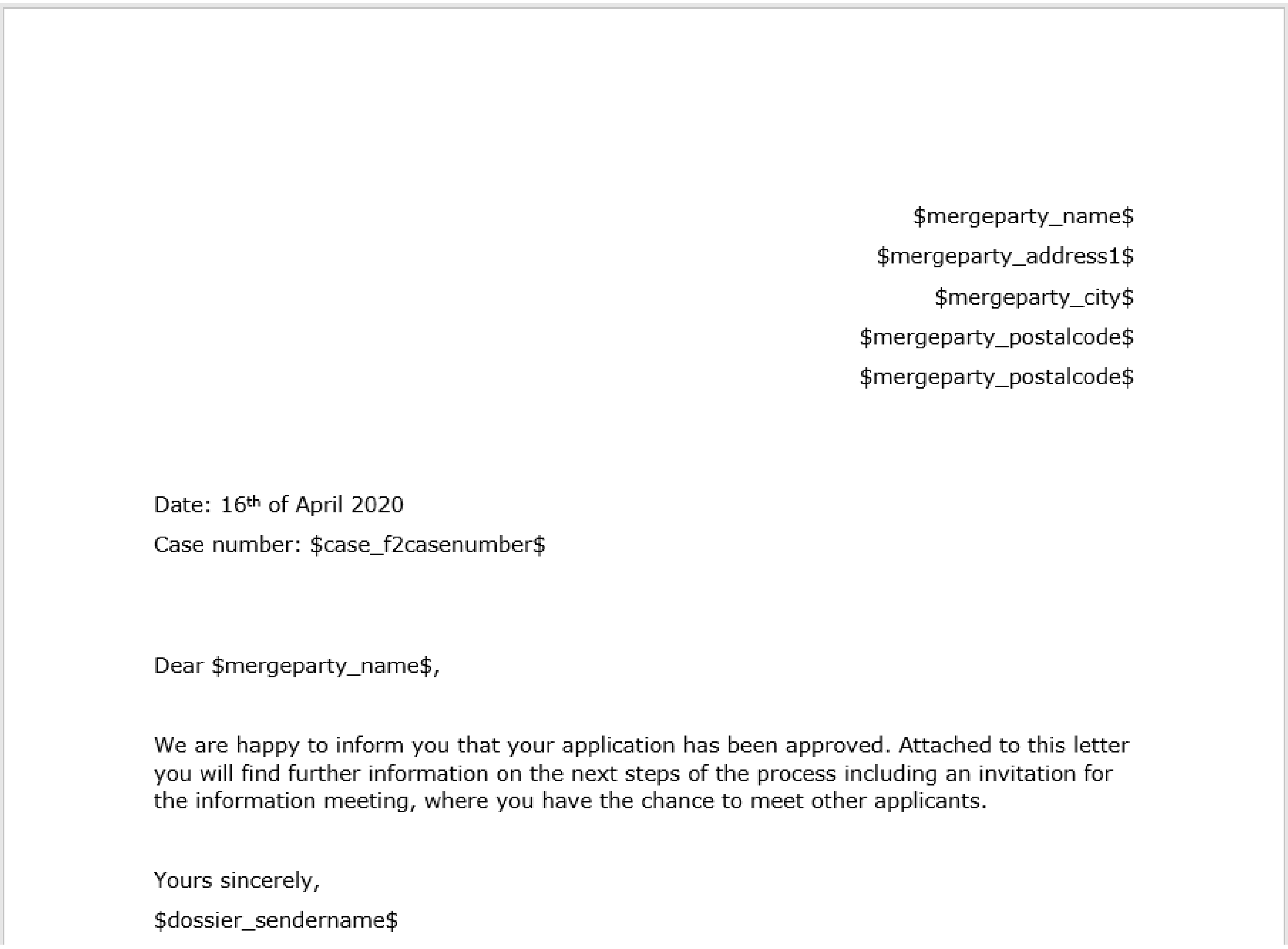
The merge code must begin with "mergeparty" when merging data from multiple participants with a template.

The table below contains some examples.

Merge field	Description
mergeparty_name	Recipient’s name
mergeparty_address1	First line of recipient’s address
mergeparty_postalcode	Recipient’s postcode
mergeparty_city	Recipient’s city
dossier_sendername	Case manager’s name
case_f2casenumber	Case number

The corresponding merge codes are created by adding “$” before and after the merge fields' names.

The example from the previous section, Example of merging data for a letter, is used here to illustrate a letter template for sending standardised information to multiple recipients. In this example, the template uses the string “mergeparty” in the merge codes to ensure that the letter will be sent to any participant identified in the “Case participants” metadata field.



$mergeparty_name$
$mergeparty_address1$
$mergeparty_city$
$mergeparty_postalcode$
$mergeparty_postalcode$

Date: 16th of April 2020

Case number: $case_f2casenumber$

Dear $mergeparty_name$,

We are happy to inform you that your application has been approved. Attached to this letter you will find further information on the next steps of the process including an invitation for the information meeting, where you have the chance to meet other applicants.

Yours sincerely,

$dossier_sendername$

Figure 8. Letter template with merge codes for multiple participants

To generate letters for multiple recipients, choose a record from which to retrieve the letter template. The record must be attached to the case with the participants.

Click on **New document from template** as shown below.

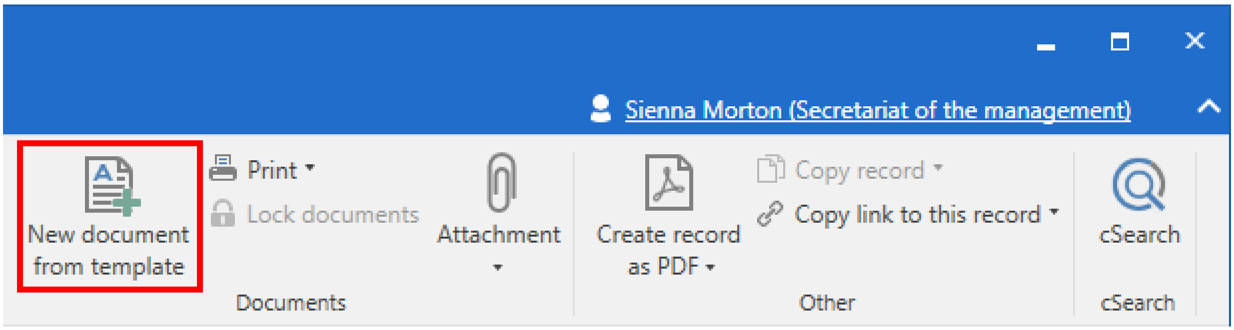


Figure 9. Attach template to record

No final letters are generated immediately upon attaching the letter template. If the document is previewed, it will still contain merge codes (mergeparty).

Save the record with the template. Click on **Copy record** and then on **Merge to case participants** to start generating the letters to multiple recipients as displayed in the figure below.

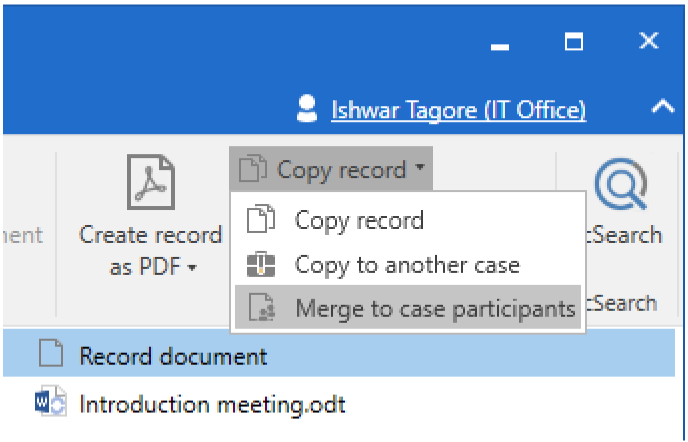


Figure 10. Merge to case participants

Click on **Merge to case participants** to open a dialogue in which it is possible to select the participants for merging.

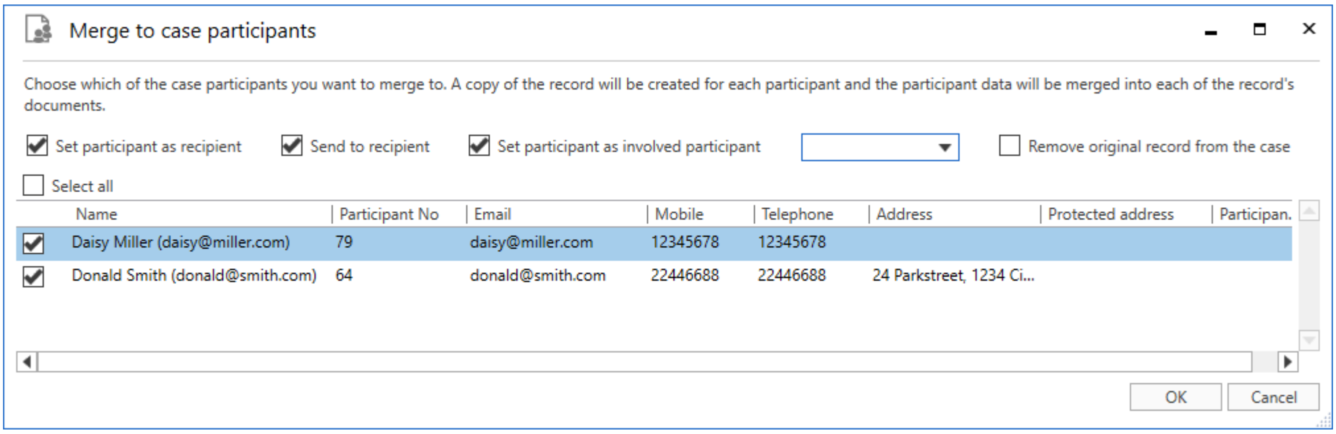
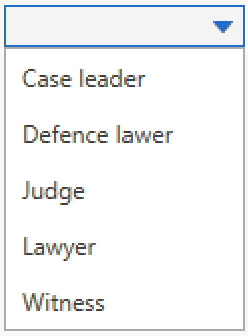


Figure 11. Select case participants

A record is generated for each selected participant.

Options in the “Merge to case parties” dialogue

Function	Description
Set participant as recipient	Tick this box to add the selected participants as recipients on the newly generated records.
Send to recipient	Tick this box to automatically send the records to the selected participants when clicking **OK**. **NOTE** The following limitations apply to records sent using this function: • No case help. • No • Attached documents will be sent in their original format. • The F2 Metadata Remover add-on (documentation available in Danish) cannot be used.
Set participant as involved participant	Tick this box to add the selected participants as involved participants on the record.
Participant type	From this drop-down menu, it is possible to assign participant types to the participants on the new record.  *Figure 12. Select participant type* **NOTE** Only applicable to external participants.
Remove original record from the case	Tick this box to remove the original record from the attached case.
Open case	

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>Set participant as recipient</td><td>Tick this box to add the selected participants as recipients on the newly generated records.</td></tr>
<tr><td>Send to recipient</td><td>Tick this box to automatically send the records to the selected participants when clicking OK.

NOTE
The following limitations apply to records sent using this function:
No case help.
No
Attached documents will be sent in their original format.
The F2 Metadata Remover add-on (documentation available in Danish) cannot be used.</td></tr>
<tr><td>Set participant as involved participant</td><td>Tick this box to add the selected participants as involved participants on the record.</td></tr>
<tr><td>Participant type</td><td>From this drop-down menu, it is possible to assign participant types to the participants on the new record.

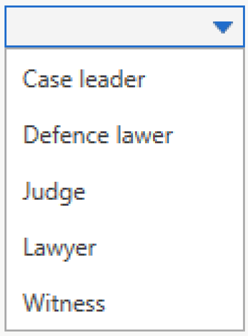


Figure 12. Select participant type

NOTE Only applicable to external participants.</td></tr>
<tr><td>Remove original record from the case</td><td>Tick this box to remove the original record from the attached case.</td></tr>
<tr><td>Open case</td><td>Tick this box to automatically open the case window after clicking OK.</td></tr>
</table>

NOTE	The fields shown in the dialogue “Merge to case participants” depend on the installation’s configurations and add-on modules. F2 is configured in cooperation with cBrain.

Click on **OK** to generate the emails and add them to the case. Each record contains a copy of the attached document with all merge codes replaced by the corresponding information. If the records have not already been sent via the “Merge to case parties” dialogue, they can now be sent to the different recipients.

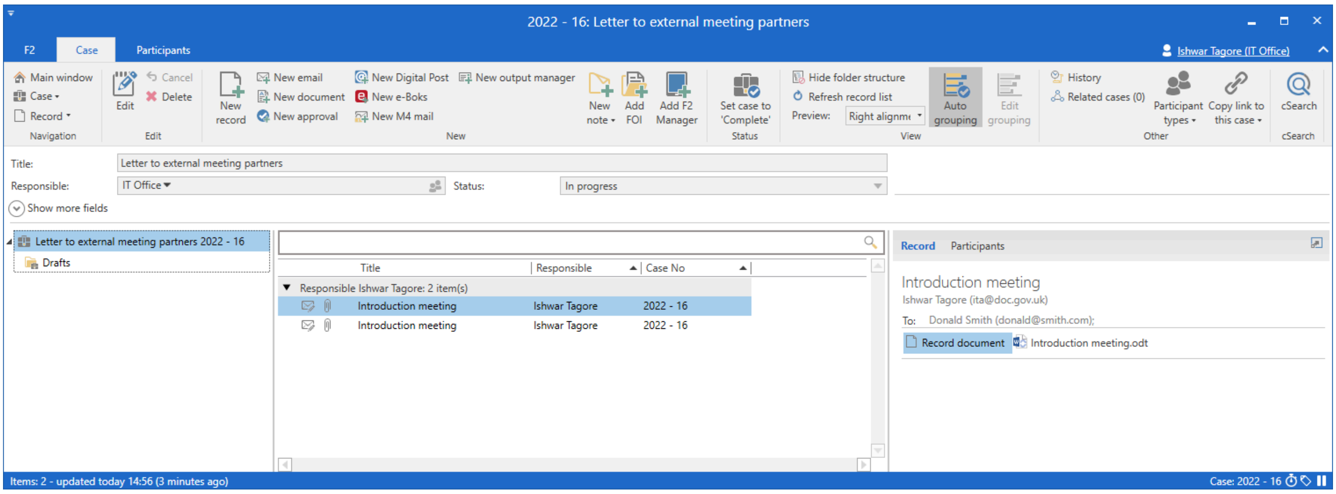


Figure 13. New emails on the case

Participant types

Participants can be assigned specific participant types. Each type has a number of corresponding merge fields, which makes it possible to refer directly to the wanted participant type when creating templates.

Participant types are assigned in the case window. A participant who has been assigned a type is automatically merged with the corresponding participant type merge codes.

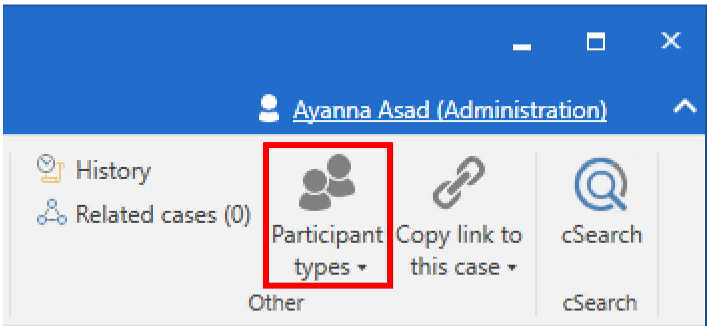


Figure 14. Participant types

Read more about participant types in the Danish documentation.

Configurable merge codes

Certain merge codes can be configured to display information in more than one format.

The configurable merge codes must be handled in accordance with the merge engine used in F2.

An example of this type of merge code is date fields. To merge a record’s letter date with a document, use the merge code $dossier_letterdate$. The standard format for dates is dd-mm-yyyy.

Specify a different format by appending it to the merge code:

- $dossier_letterdate.date(“MM-dd-yyyy”)$

Exact specifications for date formatting options are available in Microsoft’s online documentations of .NET.

Insert automatic text alternatives in boolean fields

You can use the function $field.TrueFalse("text1", "text2")$ in boolean merge fields. The function allows you to define two text alternatives where one will be automatically merged into a Word document. Which of the two text alternatives is inserted depends on whether the true or false value is selected in the field, for example in a case guide. This function may be relevant to use in tandem with F2 Task Guides.

Choose uppercase or lowercase for merge fields

You can choose whether the content of a merge field in a Word template should be written in uppercase or lowercase. Add "ToLower()" to the merge code to choose lowercase, or "ToUpper()" to choose uppercase, for example:

- $case_status.ToLower()$ merges the case status written in lowercase.
- $case_progresscode.ToUpper()$ merges the case progress code written in uppercase.

"ToLower()" can be used, for example, if the content in a merge field needs to be merged into the middle of a sentence and therefore needs to be written in lowercase. This function may be relevant to use in tandem with F2 Task Guides.

Extracting existing merge fields

Changes to existing fields and addition of new fields to the F2 database may eventually occur. It is thus relevant to extract a list of available fields periodically.

Such a list of merge fields can be generated in the same way as with the letters described above. Read more in Merging with templates.

Create a Word template containing only the following merge code:

- all_keys

NOTE The template cannot contain any other merge codes.

Attach this template to a record to generate an exhaustive list of merge fields in F2 available at the time of creation.

It can be challenging to identify the exact merge field to use. It is recommended to fill in as many metadata fields on the record and case as possible before generating the document, since the information from these fields is displayed next to their corresponding merge fields in the "all keys" document.

The following is an excerpt from such a list. Bolded text indicates information retrieved from filled-in metadata fields:

dossier_createdbyuserid: **634381**
dossier_createdbyusername: **Ann Sekner**
dossier_createddate: **16/04/2020**
dossier_createreceiverregistrations: **False**
dossier_currentlocation:
dossier_currentlocationdocid:
dossier_currentlocationpartytype:
dossier_deadline: **23/04/2020**
dossier_deliverytype: **Email**
dossier_digitalmaildispatchexternalstatus:
dossier_digitalmaildispatchfailed: **False**

NOTE Other F2 lists can also be merged with a Word template, e.g. lists created from case guide fields or case metadata. Contact cBrain for further information.

Merge field examples

On this page you can find lists of merge code examples for records and cases.

Merge fields on records

The table below shows examples of commonly used merge fields on a record. The prefix dossier must be added to the field names in the “Metadata field” column to indicate that the fields refer to data from a record. The “Merge field” column shows the field name prefixed with the record type. The “Merge code” column shows how the field is referred to when using merge codes.

Metadata field	Merge field	Merge code
Access	dossier_accesstype	$dossier_accesstype$
Bcc	dossier_bccreceivernames	$dossier_bccreceivernames$
Case help	dossier_casehelp	$dossier_casehelp$
Cc	dossier_ccreceivernames	$dossier_ccreceivernames$
Created by	dossier_createdbyusername	$dossier_createdbyusername$
Creation date	dossier_createddate	$dossier_createddate$
Deadline	dossier_deadline	$dossier_deadline$
Flag	dossier_myflag	$dossier_myflag$
Keywords	dossier_keywords	$dossier_keywords$
Letter date	dossier_letterdate	$dossier_letterdate$
Locked	dossier_locked	$dossier_locked$
Personal control	dossier_caseworker	$dossier_caseworker$
Personal deadline	dossier_mydeadline	$dossier_mydeadline$
Previous case no.	dossier_previouscasenumber	$dossier_previouscasenumber$
Received date	dossier_mailreceiveddate	$dossier_mailreceiveddate$
Recipient	dossier_receivernames	$dossier_receivernames$
Record no.	dossier_documentnumber	$dossier_documentnumber$
Record type	dossier_documenttype	$dossier_documenttype$
Registered	dossier_archived	$dossier_archived$
Reminder date	dossier_reminddate	$dossier_reminddate$
Responsible user	dossier_responsiblename	$dossier_responsiblename$
Sender	dossier_sendername	$dossier_sendername$
SSN/Company no.	dossier_cprnumber	$dossier_cprnumber$
Status	dossier_status	$dossier_status$
Title	dossier_title	$dossier_title$
Undefined	dossier_undefined	$dossier_undefined$

Merge fields on cases

The table below shows examples of commonly used merge fields on a case. The prefix case must be added to the field names in the “Metadata field” column to indicate that the fields refer to data from a case. The “Merge field” column shows the field name prefixed with the case type. The “Merge code” column shows how the field is referred to when using merge codes.

Metadata field	Merge field	Merge code
Case no.	case_f2casenumber	$case_f2casenumber$
Case title	case_title	$case_title$
Deadline	case_deadline	$case_deadline$
Keywords	case_keywords	$case_keywords$
Previous case no.	case_previouscasenumber	$case_previouscasenumber$
Progress code	case_progresscode	$case_progresscode$
Responsible user	case_responsiblename	$case_responsiblename$
SSN/Company no.	case_cprcvrnumber	$case_cprcvrnumber$
Status	case_status	$case_status$
Suppl. case manager	case_supplcaseworkers_0_name	$case_supplcaseworkers_0_name$
Suppl. case manager	case_supplcaseworkers_1_name	$case_supplcaseworkers_1_name$