Contract and Offer Documentation: Managing Flexible Paragraphs Using MS Word™ Field Formatting

Contents

Summary

This document describes a solution for a common customer requirement relating to producing contract and offer letter templates from Lumesse TalentLink.

The document is intended as a step-by-step introduction to using Lumesse TalentLink in collaboration with MS Word 2010 and includes instructions for both tools.

Requirements

Lumesse TalentLink enables customers to create template contract and offer letters using MS Word. When details of a contract are stored within a TalentLink "Conditions Form" these details can be downloaded to a template using standard MS Word Mail Merge functionality.

For the majority of customers the contractual documentation changes depend on the terms of employment for an individual based on a wide variety of parameters, contract type, location, function of a position and so on. These variations are often reflected in the legal clauses and paragraphs that should be used within each issued document.

TalentLink does not store the specific text for these flexible paragraphs and sections and often customers have a very large number of variable sections or "boiler plates" which can become unmanageable for individual users or employees.

Standard MS Word includes a capability for Mail Merge called "Field Formatting" or "Field Switching". This gives a template owner the power to apply rules to individual sections of text which can automate the display or hiding of later text. These rules behave in a similar way to formulae in MS Excel.

Working Example for this Guide

The customer has a requirement that a contract sent to a Permanent new hire should include details of the holiday entitlement in the documentation. However, if the contract is sent to a Temporary worker then there are no Holiday and Pension details and a separate piece of text should be included in place of the Permanent text. In addition if the contractor is hired through a third party then a separate paragraph needs to detail any pension provision.

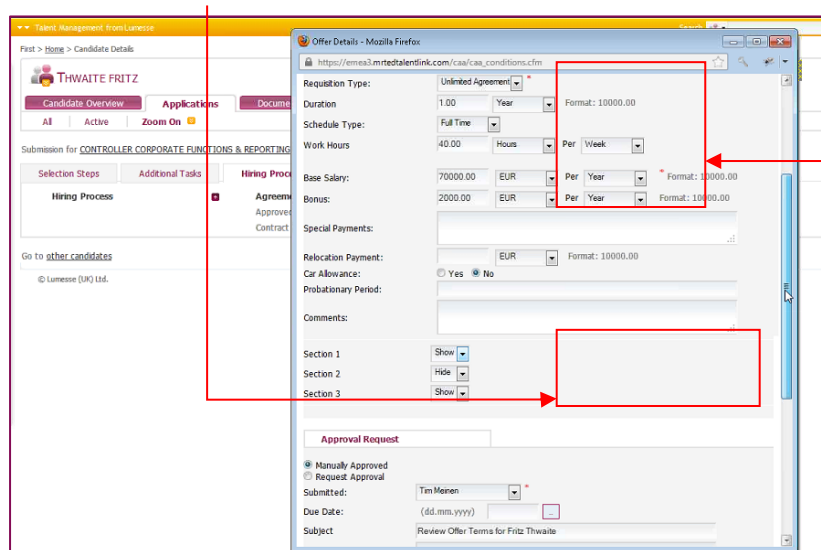| Text in document	Text to display for Permanent	Text to display for Temporary
Holiday	Holidays: You will be entitled to 1.66 days paid leave for each complete month worked. Leave may be taken at any time subject to prior approval. On termination of employment, an adjustment to final salary will be made in respect of leave taken in advance of entitlement. Public holidays shall be given in accordance with the Organisation of Working Time Act 1997.	Holidays: There is no paid holiday allowance for workers assigned to temporary contracts within the first 12 months.
Pension	Access to a standard Personal retirement savings account (PRSA): In accordance with the Pensions (Amendment) Act 2002 we are approved as a PRSA provider so as you can have access to a standard PRSA contract. We can deduct PRSA contributions from your salary on request by you and remit them, without deduction, into your PRSA policy by the end of the month in which the deductions are made. For further information on this please contact the HR department.	Access to a standard Personal retirement savings account (PRSA): There is no PRSA provision with a contract via a third party.

Setting up a Contract or Offer Template

Before editing a document with Field Formatting a customer should have a template correctly loaded and formatted within TalentLink.

The steps to create this document template are listed in the standard Administrator's Guide available from the Customer portal, in the section "*Create Word Templates*".

This template should include the fields used to help identify the specific paragraphs to be displayed. There are two ways to manage this:

1. Use existing standard or configurable fields and values and link these to the text (*which is what is done in this example*).
2. Create specific clauses or section fields only used for this action.


From the start of your project it is essential that you clearly structure the fields in TalentLink that act as triggers for your contractual variations. Map these before starting the configuration of your Merge field switches.

Adding MS Word Field Formatting

MS Word includes a field format called "if…then…else" with a wizard tool to help you create this correctly. This section guides you through the steps to use this rule wizard.

1. From within your master template select the section header that will have a rule.
2. Position your cursor at the start of the word or phrase you wish to add a rule to.
3. Under the Mailings Tab in MS Word select *RULES > If…then…else*.
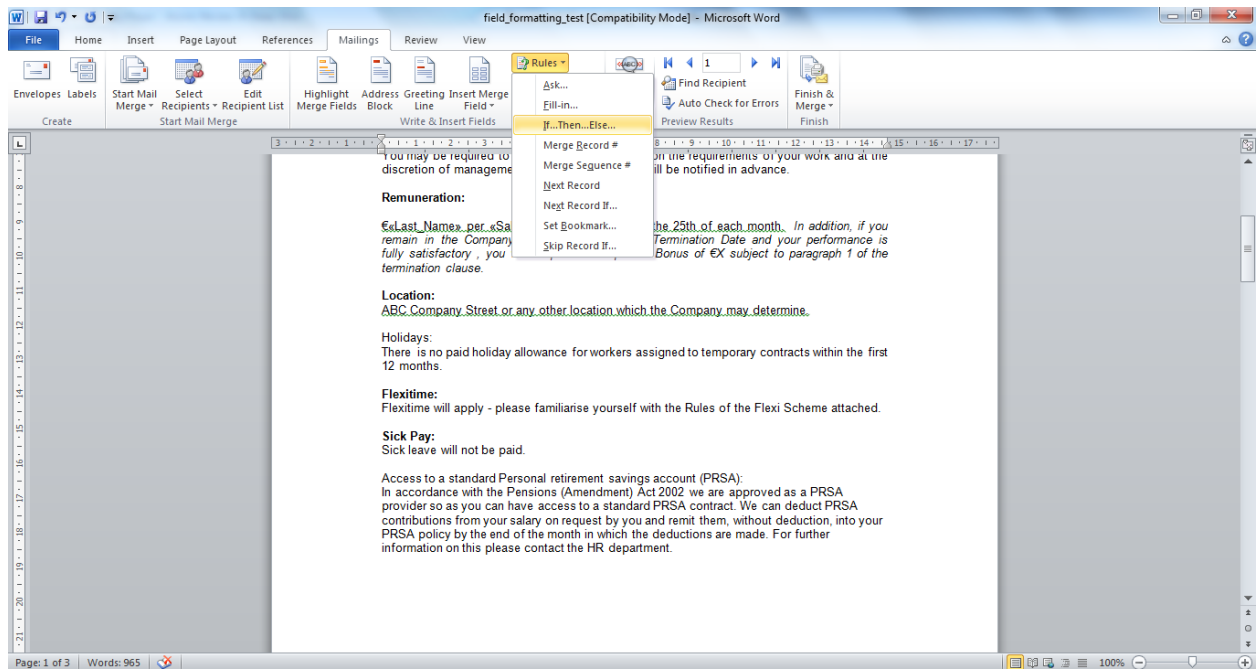
A dialog box is displayed:
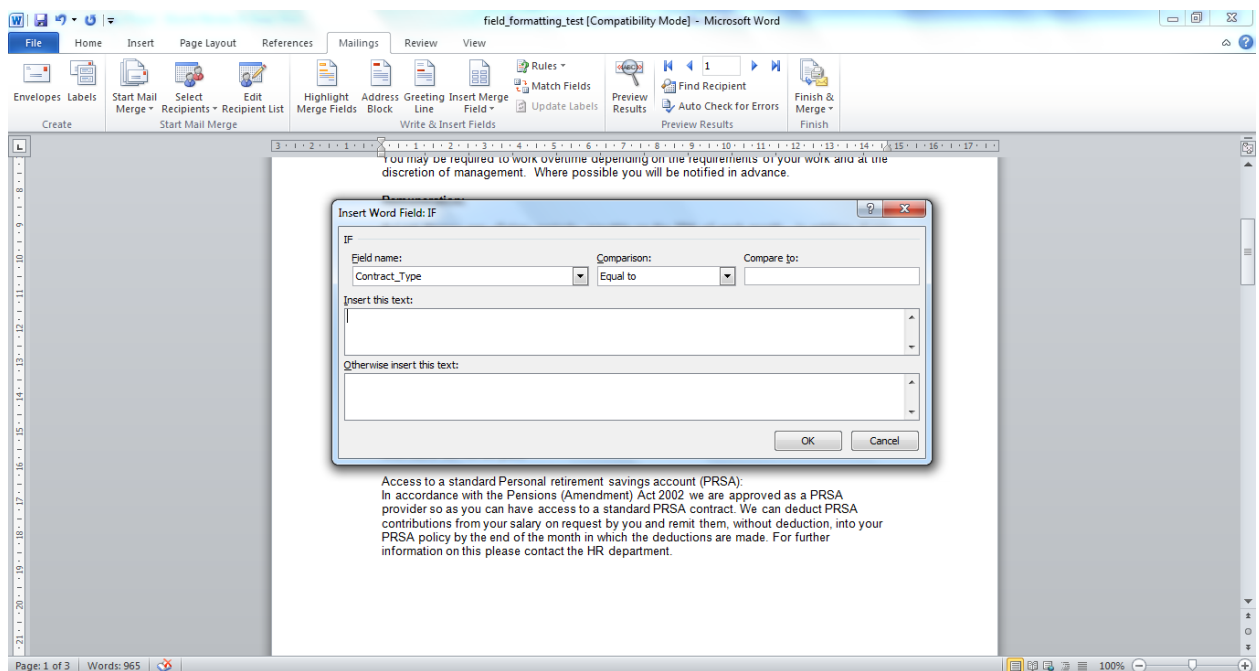
ⓘ You now select your merge fields from TalentLink and tell MS Word what to do when specific values from these fields are displayed in the document. The section **Field_Name** contains the merge fields from TalentLink.

ⓘ You are asked to prepare **either ….OR** behaviours – named in the pop-up as **insert … Otherwise**. This is either the text to display based on the field value selected OR the default text that is displayed in all other situations.

4. Within the Field_Name box, locate the required merge field (for example Contract Type).

5. In the **Compare To** box type the exact wording of the value from the field. Type in standard alpha characters, with no underscores or other punctuation required (For examples "Temporary Contract").

6. Within the **Insert this text** box type or copy and paste the first variation of text (it is a good idea to save your text in a different software package, for example Notepad, if you want to copy and paste. MS Word does not allow you to leave the dialog box whilst you are using it.

7. Within the **otherwise insert this text** type or copy and paste the default paragraph text.
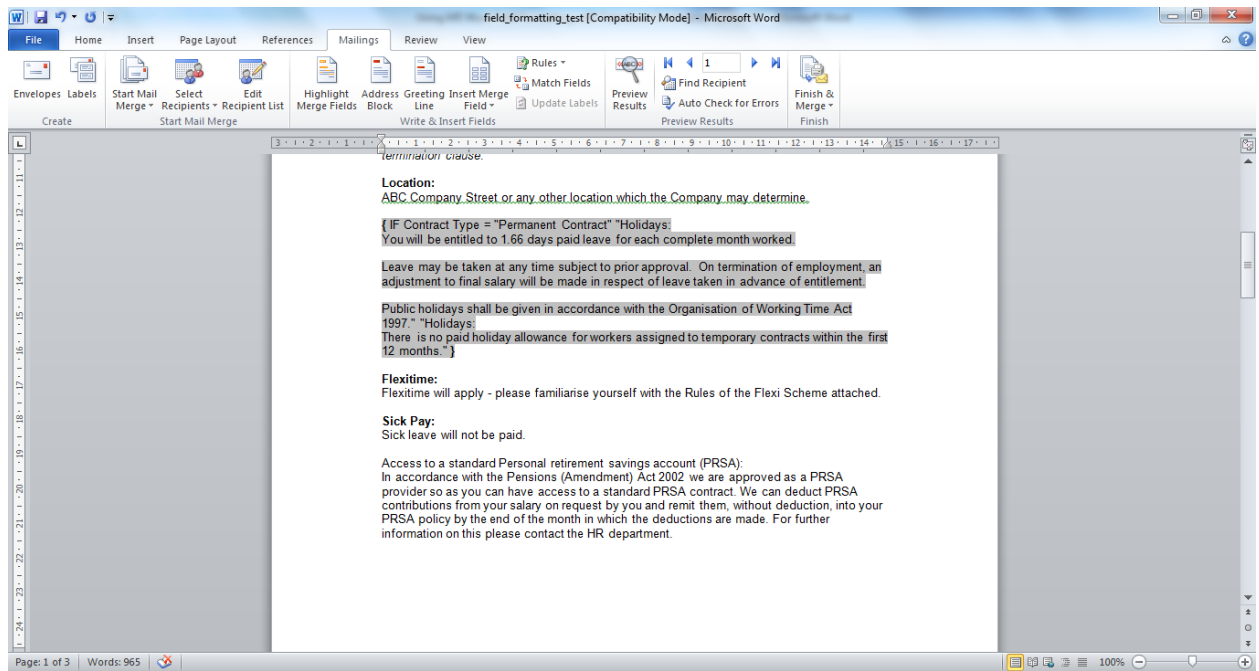
ⓘ Once you have added your field formatting, the document text may change to reflect the nature of the rules.
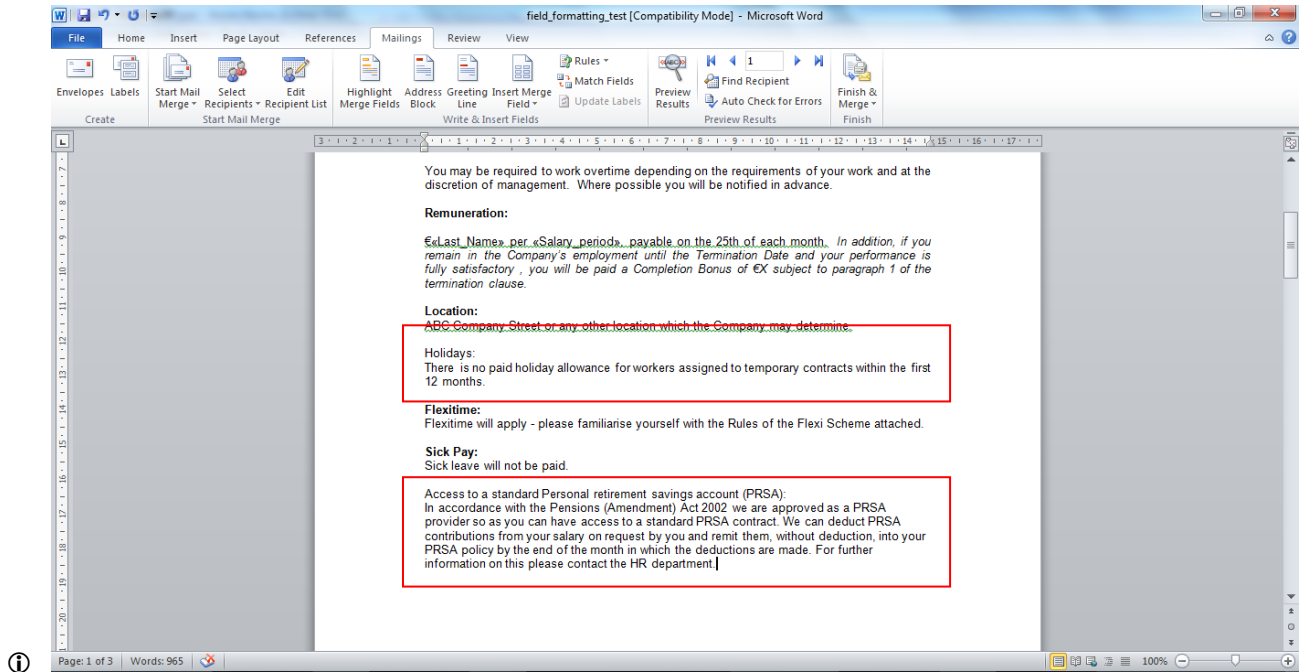
8. To review what you have done, right click and select **Toggle Field Codes**
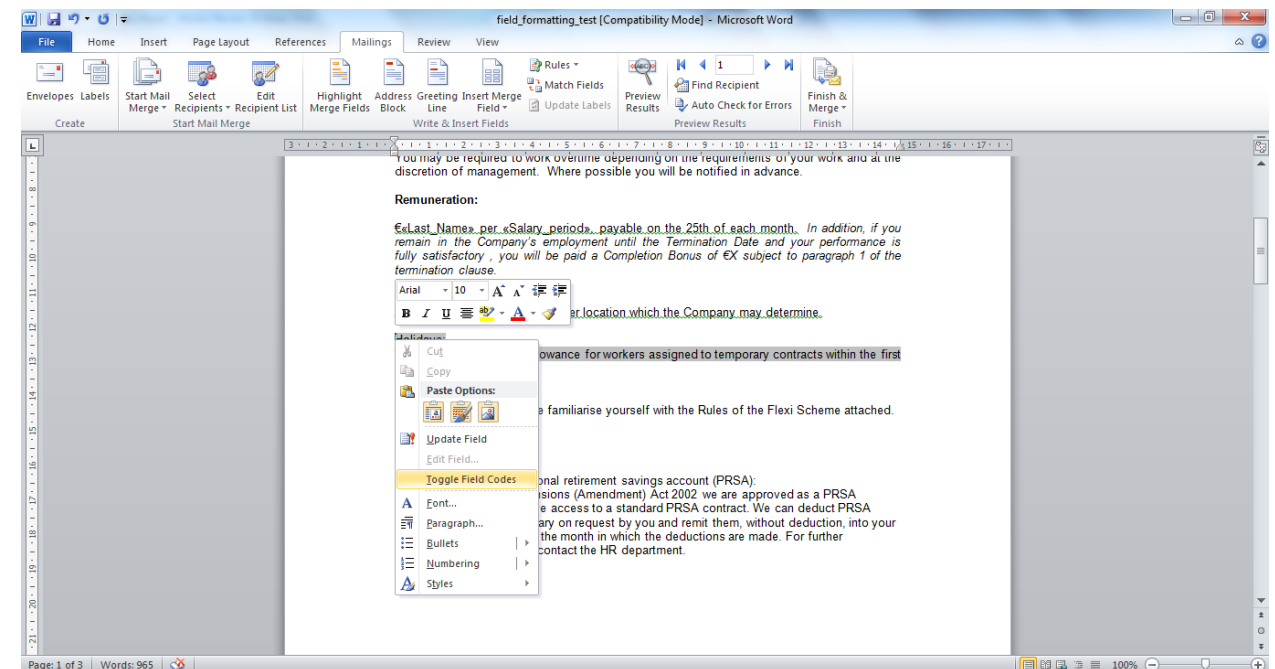
If you have successfully added text, you should see the following.

Adding Multiple Rules to a Single Merge Field

It is possible to add multiple rules to a single merge field. Simply create the first rule, ensure that your cursor is still in the same place, then select the rules icon again and re-complete the process.

Adding Field Switches Without Using the Wizard

As well as the rules wizard approach described previously it is possible to create the same effect on your document manually, building up the rules as you go. Learning how to do this can help later when you want to increase the levels of complexity within your document.

Field Code Syntax

Field codes appear between curly brackets ({ }). Fields behave like formulae in Microsoft Excel — the field code is like the formula, and the field result is like the value that the formula produces. You can switch between displaying field codes and results in your document by pressing ALT+F9.

When you view a field code in your document, the syntax looks like this:

{ *FIELD NAME Properties Optional switches* **}**

- ✦ **FIELD NAME -** The name that appears in the list of field names in the **Field** dialog box.
- ✦ **Properties** - Any instructions or variables that are used in a particular field. Not all fields have parameters, and in some fields, parameters are optional instead of mandatory.
- ✦ **Optional switches** - Any optional settings that are available for a particular field. Not all fields have switches available, other than those that govern the formatting of the field results.

Insert a Field

1. Click where you want to insert a field.
2. From the **Insert** tab, in the **Text** group, click **Quick Parts**, and then **Field**.
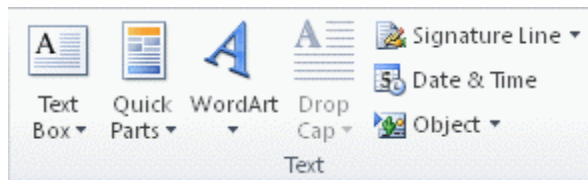
3. From the **Categories** list, select a category.
4. From the **Field names** list, select a field name.
5. Select any required properties or options.

   ⓘ To see the codes for a particular field in the **Field** dialog box, click **Field Codes**.

   ⓘ To nest a field within another field, first insert the outer, or container, field, using the **Field** dialog box. In your document, place the insertion point inside the field code where you want to insert the inner field, then use the **Field** dialog box to insert the inner field.

   Tip If you know the field code for the field that you want to insert, you can type it directly in your document. Press CTRL+F9, and then type the code within the brackets.

Edit a Field

1. Right-click in the field, and then click **Edit Field**.
2. Change the field properties and options. For information about the properties and options available for a particular field, see [Field Codes in Word](#) or search on the field name in Help.

   ⓘ For some fields, you must display the field code to edit the field. To do this, click the field, and then press SHIFT+F9. Or, to display all the field codes in the document, press ALT+F9.

ⓘ Some fields are edited in their own dialog boxes instead of in the **Field** dialog box. For example, if you right-click a hyperlink and then click **Edit Hyperlink**, the **Edit Hyperlink** dialog box opens

Adding Greater Sophistication to Your Document

Once you have created your first rule it is entirely possible to add increasing levels of complexity, linking new text to previously managed sections.

You are can use as many *if…then…else* rules connected to the same Mail Merge field and value as you like.

You can also use a simpler *If* rule and add all the possible options into the merge field switch. This ultimately creates a master document incorporating all the possible mail merge results but of course only displays the relevant information based on the final merged data fields.

For example:
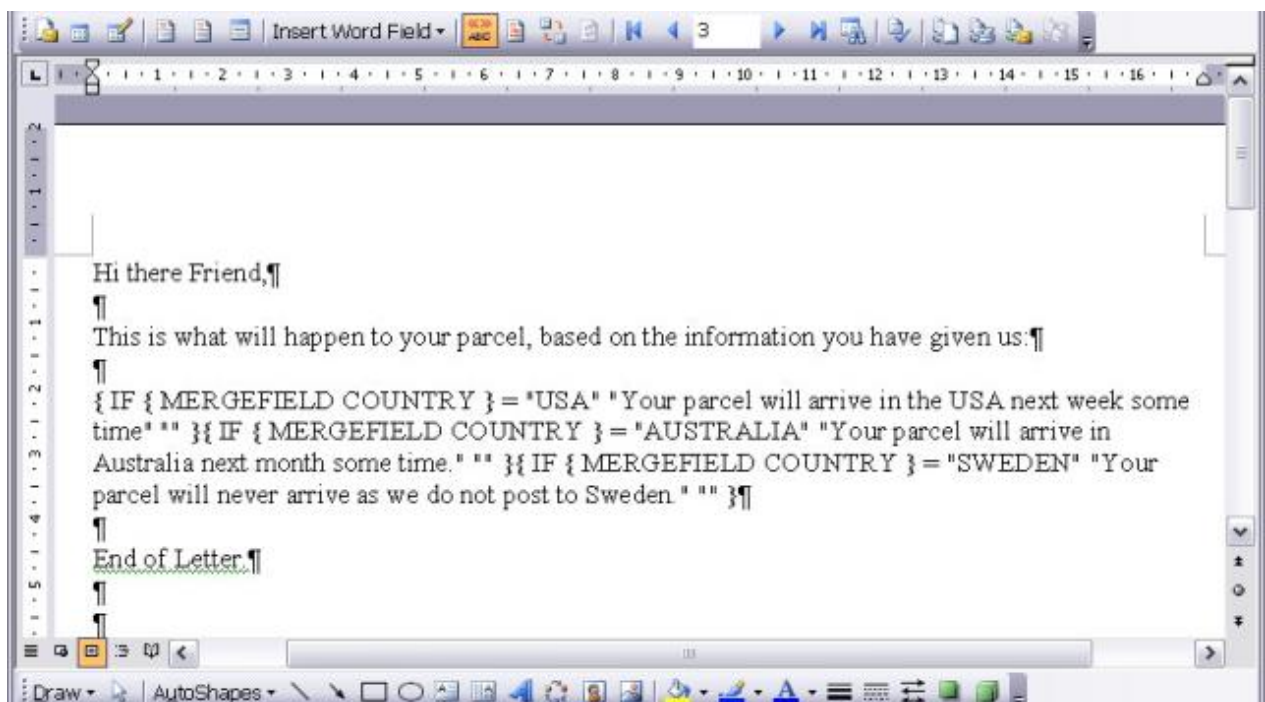
Notice that in this example there are several *IF* rules nesting together, connecting the database field, *COUNTRY*" to the different sections of text.

Appendix 1 – Additional Sources

Insert Field Codes in MS Word 2010
http://office.microsoft.com/en-gb/word-help/insert-and-format-field-codes-in-word-2010-HA101830917.aspx

Field Codes in MS Word:
http://office.microsoft.com/en-gb/word-help/field-codes-in-word-HA102110133.aspx?CTT=5&origin=HA101830917

Field Code and Nesting Codes:
http://www.christiano.ch/wordpress/office/microsoft-office-word-mail-merge-merge-fields-rules-and-conditions/