How to Create Templates
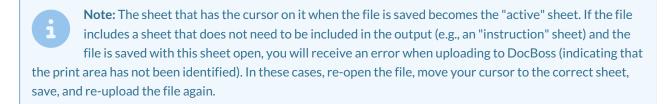
Steps for creating a template.

1. **Must be in excel format**

2. **Any cells where the output data is to be defined by DocBoss, must have applicable variable entered**

3. **You must set your print area (remember to include the last column)**

Convert to Excel

DocBoss Support will convert Word (.docx) to Excel (.xlsx) for you on request. If preferred to do this yourself, the easiest way is to save as a PDF and convert the PDF to Excel (.xlsx). Another option is to build the template from scratch (see article: Template Troubleshooting, Tips and Tricks).
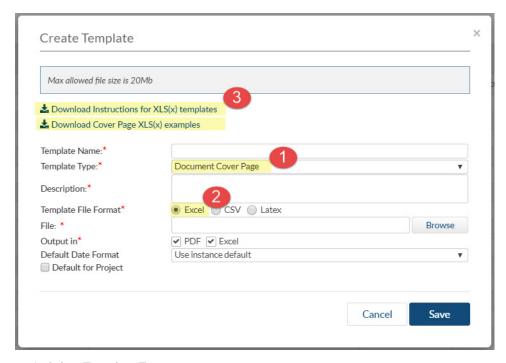
Excel Format

1. Do NOT save the file using compatibility view.

2. If file is xls, you must edit/save in Excel 2003 OR

3. If you edit in a newer version, please save as xlsx file.

4. Always define your print area. This is one of the features affected by compatibility view, and it is critical for cover pages.

   a. If the template has more than one page (i.e., multiple sheets), make sure to define the print area on **each** sheet that should be included in the output (see note).

> ℹ️ **Note:** The sheet that has the cursor on it when the file is saved becomes the "active" sheet. If the file includes a sheet that does not need to be included in the output (e.g., an "instruction" sheet) and the file is saved with this sheet open, you will receive an error when uploading to DocBoss (indicating that the print area has not been identified). In these cases, re-open the file, move your cursor to the correct sheet, save, and re-upload the file again.

Adding Variables

In order to download the instructions to add the variables to your templates - **Navigate to Settings > Output Templates and Click the +**.

First select the Template Type and, as soon as you check on Excel it allows you to Download Instructions for XLS(x) templates and also a link to examples of selected Template Type (i.e Download Cover Page XLS(x) examples).

1. Select Template Type

2. Choose a Template File Format

3. Download Instructions

If you download the instructions it will provide you with all of the applicable variables you can use. The variables dictate what information is pulled into that applicable cell. For example, it is typical that the customer purchase order would have to be referenced on all of the templates. If you download the instructions, on the General Variables Tab you will find <PO_Number>. So somewhere on your Excel Template, you will see something similar to:

Customer Purchase Order<PO_Number>

You will find the different variable sets on the seven SHEETS of the workbook (look at the bottom of the excel file to see the sheet tabs). Intro tab contains basic steps and instruction on using the Variables. The General Variables can be used anywhere. TYPE=Cover Page would be used on Document Cover Page templates, TYPE=Transmittal would be used on Transmittal templates, TYPE=Index would be used on Document Index templates, and TYPE=Compilation Cover Page would be used on Compilation Cover Page templates. Note that you can not create these variables yourself. There is also a Parameters tab where you will find parameters to be used with the variables.

Here is an example of an excel template with variables:

Document Cover Page

<Project_Name>

<Document_SupplierDocNumber> <Document_Title>

Supplier Name		<Supplier_Name>			
Purchase Order		<PO_Number>			
Document Number		<Document_CustomerDocNumber>	Rev		<Document_PrimaryR
				Rev	<Document_PrimaryR
Supplier Document Number		<Document_SupplierDocNumber>			
Reason For Submission		<Document_Status><Document_StageNameStatusAdder>			
Issue Date		<Current_Date|date_format=j-M-y>			

Approval Status:

1 – Review and Accepted - Work may proceed

2 – Revise and resubmit - Work may proceed subject to incorporation of comments

3 – Revise and resubmit - Work may NOT proceed

4 – Review not required - For Information Only

SUPPLIER PLEASE NOTE: Permission to proceed does not constitute acceptance or approval of design details, calculations, analyses, test methods or materials developed or selected by the supplier and does not relieve supplier from full compliance with contractual obligation.

By: _____   Date: _____

Here is the output after being used on a project. Note - the result of the variable will be specific to the information entered on each specific project.

Document Cover Page

Valves

1234-E01-0009-001 NEAL

Supplier Name		Z Rachel Process Equipment		
Purchase Order		1234		
Document Number		ABC123	Rev	000
Supplier Document Number		1234-E01-0009-001	Rev	000
Reason For Submission		Issued For Information		
Issue Date		3-Sep-14		

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By: _____   Date: _____

Note: you can use most variables in Header/Footers on your excel template.

For more information on working with Templates please check out our video: Templates

PDF Templates Manual

For reference, you can download the following templates manual: DocBoss Templates Manual.pdf 📎

Next steps:

Upload Templates into Docboss

Select Cover Page and Transmittal Templates on Project

Add an SDI Report to your project