

# How to Create Templates

02/02/2026 3:36 pm MST

## 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).



**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

To begin filling in your template with variables, first download the instructions sheet. [Navigate to System Menu > Template Mgmt > Output Templates](#) and click the "Instructions" button to download.

The screenshot shows the 'Output Templates' section of the 'Template Mgmt' application. At the top, there are navigation links for 'Template Mgmt' and 'Output Templates'. Below this, a search bar and a 'Customer' dropdown are visible. On the right, there are buttons for 'Disabled', 'Show' (which is highlighted with a red box and arrow), 'Instructions' (also highlighted with a red box and arrow), and '+Add'. The main area is titled 'PDF/CSV/XLS Templates' and contains a search bar with the placeholder 'Select or type ahead...' and a 'Search' button.

You will find the different variable sets on the different SHEETS of the workbook (look at the bottom of the excel file to see the sheet "tabs").

- The "Intro" sheet contains basic steps and instructions on using the variables.
- The "General Variables" sheet provides variables which can be used on any template type.
- The "TYPE=Cover Page (Reg+Comp),Stamp" sheet provides variables which can be used on Document Cover Page, Compilation Cover Page, and Stamp templates.
- The "TYPE=Transmittal" sheet provides variables which can be used on Transmittal templates.
- The "TYPE=Index" sheet provides variables which can be used on Document Index templates.
- Etc...

The last sheet in the workbook ("Parameters") is where you will find a list of parameters that can be used to trim, filter, format, or otherwise modify the output of variables. The parameters that are supported with any given variable are listed beside the variable in the "Available Parameters" column.

Here is an example of an excel template with variables:

	A	B	C	D	E	F	G	H	I												
1																					
2	<b>Document Cover Page</b>																				
3																					
4																					
5	<Project_Name>																				
6																					
7	<Document_SupplierDocNumber> <Document_Title>																				
9	Supplier Name		<Supplier_Name>																		
10	Purchase Order		<PO_Number>																		
11	Document Number		<Document_CustomerDocNumber>	Rev	<Document_PrimaryR																
12	Supplier Document Number		<Document_SupplierDocNumber>	Rev	<Document_PrimaryR																
13	Reason For Submission		<Document_Status><Document_StageNameStatusAdder>																		
14	Issue Date		<Current_Date date_format=j-M-y>																		
15	<u>Approval Status:</u>																				
16	1 – Review and Accepted - Work may proceed																				
17	2 – Revise and resubmit - Work may proceed subject to incorporation of comments																				
18	3 – Revise and resubmit - Work may NOT proceed																				
19	4 – Review not required - For Information Only																				
20	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.																				
21																					
22																					
23																					
24	By: _____ Date: _____																				
25																					
26																					
27																					
28																					

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		
<b>Approval Status:</b> 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			
<i>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.</i>			
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](#)