

Upload Templates into DocBoss

09/16/2024 1:38 pm MDT

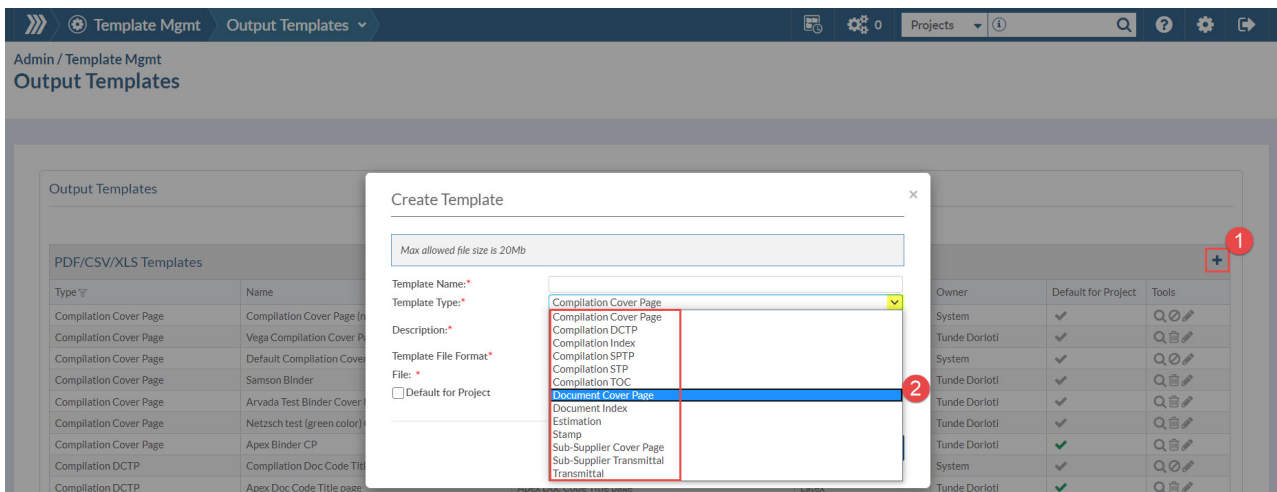
Before starting, note that templates:

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)

For more information about how to create template, click [here](#) to read the complete article.

Let's start!

In order to upload templates in DocBoss: *Navigate to Settings > Template Mgmt > Output Templates*



1. Click + button
2. Select Template Type

Create Template
✕

Max allowed file size is 20Mb

[Download Instructions for XLS\(x\) templates](#)

[Download Cover Page XLS\(x\) examples](#)

Template Name:*

1

Template Type:*

Document Cover Page

2

Description:*

3

Template File Format*

Excel
 CSV
 Latex

4

File: *

Browse

Output in*

PDF
 Excel

Default Date Format

Use instance default

Default for Project

Cancel

5 Save

1. Fill in the Template Name
2. Fill in the Description
3. Select the Template File Format (Excel, CSV or Latex)
4. Browse and select the template with the variables
5. Click Save

Now the templates are ready for use!

For more information on working with Templates please check out our video: [Templates](#)

Next steps:

[Select Cover Page and Transmittal Templates on Project](#)

[Select Transmittal Templates on Project](#)

[Add an SDI Report to your project](#)