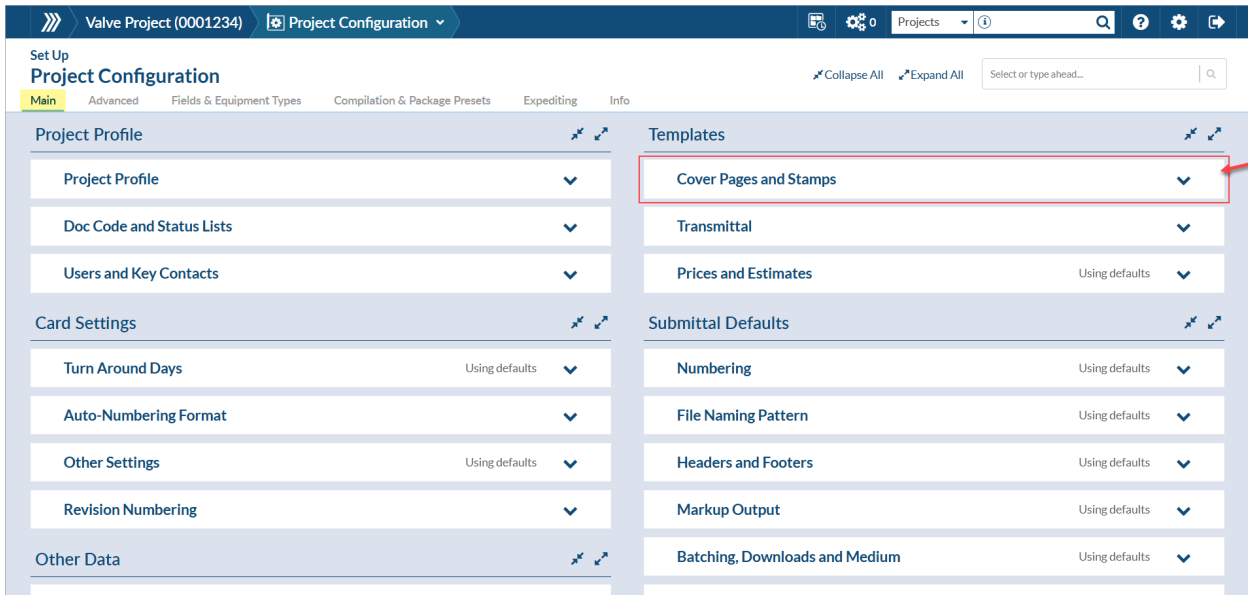


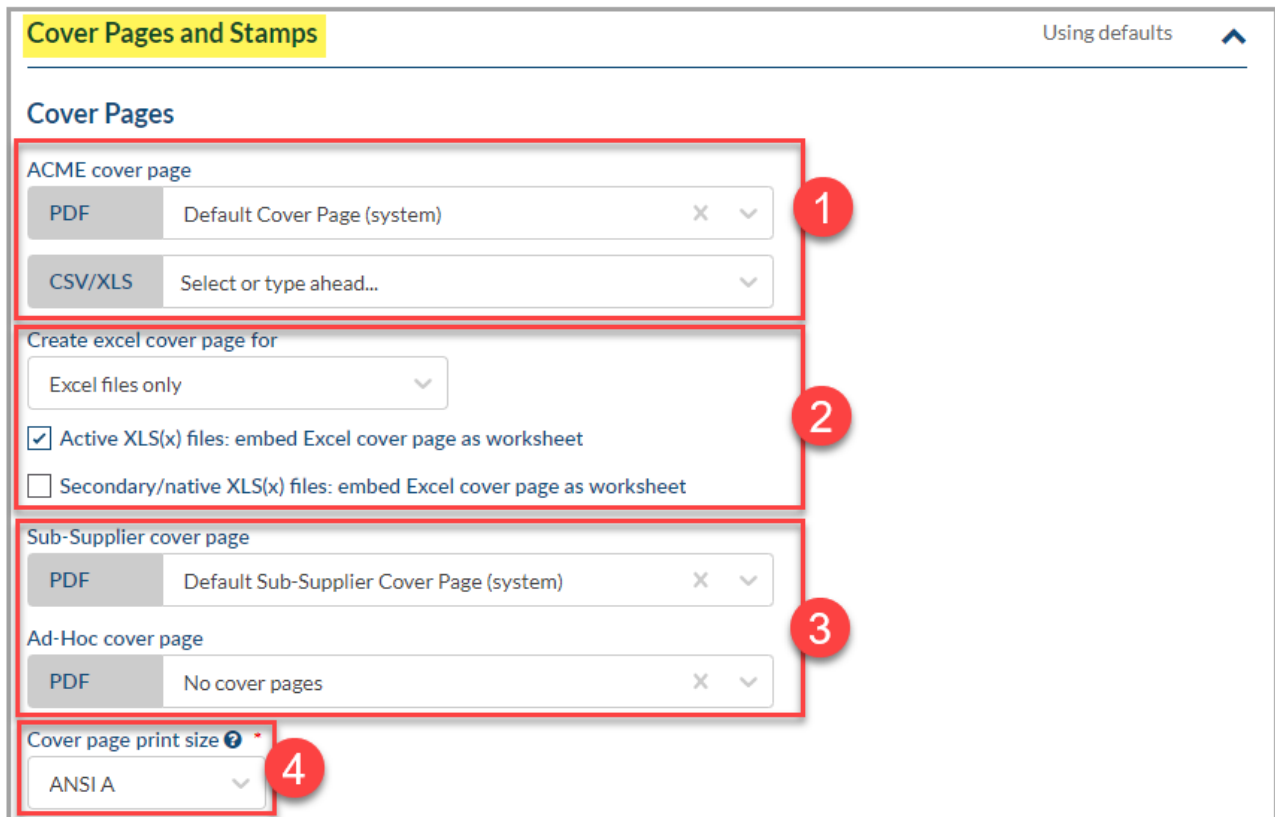
Select Cover Page Templates and Settings on Project

04/08/2026 4:07 pm MDT

On the "Main" tab of the Project Configuration page, you can choose which template you want to use for your project, for both Customer and Sub-Supplier submittals. To begin, expand the "Cover Pages and Stamps" section.



You can also choose here how you want to create Excel cover pages - add to Excel files only or All Files, and if you want to embed the excel cover page into the Excel document you are sending out.



1) Select from drop down list of available Cover Page templates that are available for your use on the project - select both PDF and Excel version.

2) Select from drop down if you want to create **Excel** cover pages for Excel files only, or **All files**. Once this selection is made, choose whether to embed the Excel file as a worksheet within your Excel files, or submit as separate files. If submitted as separate files, the files will be named using the "Stand alone cover page pattern" defined in the "File Naming Pattern" area of the Project Configuration page.

3) Select from drop down which Sub-Supplier cover page you want to use on the project.

4) Select the cover page print size.

Remember to click **Save Project** on the top left of the screen once your selections have been made!

If you wish to modify the cover page preferences based on each Doc Code, [click here](#) to read the article Cover page and Stamp preference for each doc code.

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