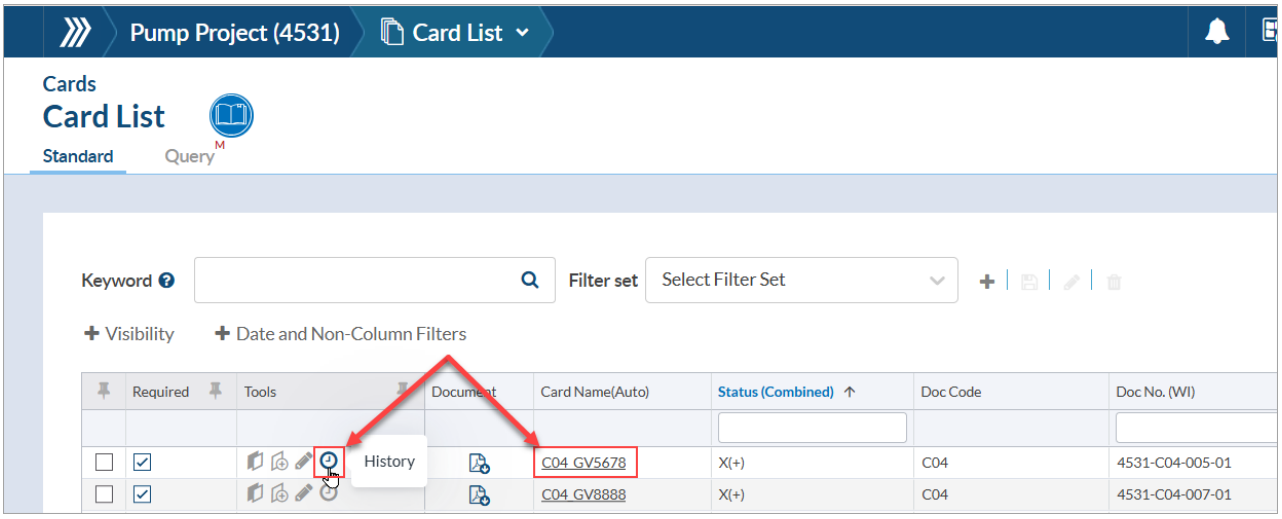
Testing Cover Pages

09/28/2026 9:04 am MDT

Before making a submittal, you can test the cover page for any card.

To do this, navigate to the card history screen. The card history can be accessed by clicking the clock icon under "Tools" on the Card List (or by clicking the **Card Name (Auto)** link on any grid which includes this column).

> **Tip:** It can be helpful to open the card history of a few different cards. We specifically recommend running a cover page test on a card with a large number of tags (to ensure the cover page will scale as expected).

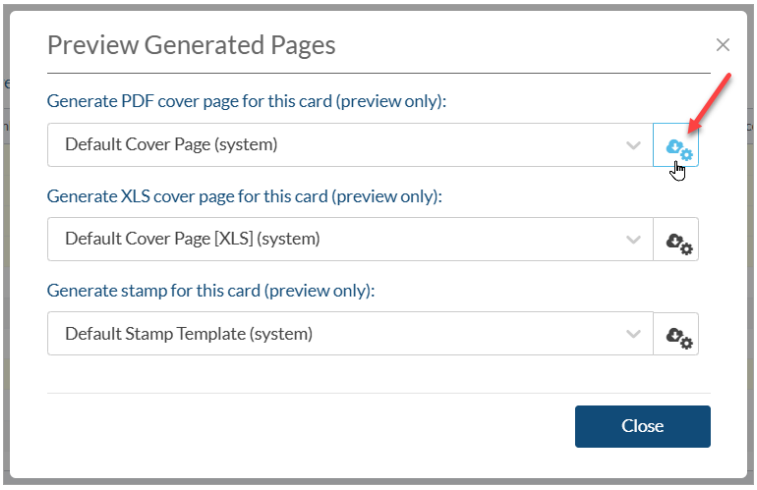


On the history screen, click the **Cover Page Test** option in the top right corner.



By default, you will have the option to test the cover pages templates (both PDF in XLS) that have been selected on the project (see article: Select Cover Page Templates and Settings on Project), but you can choose to test a different template if desired.

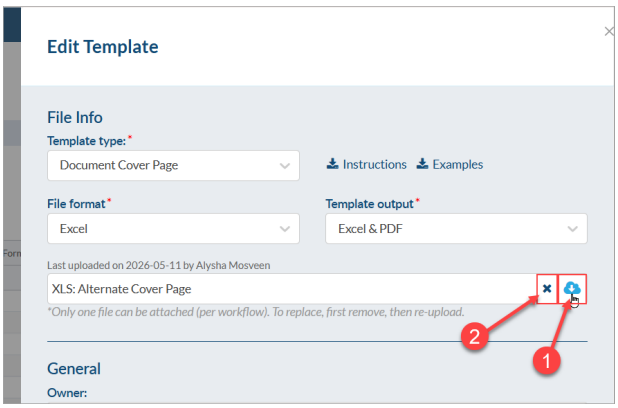
Click the generate button beside the template you wish to test.

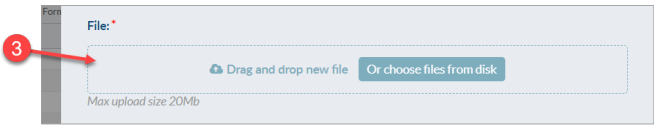


Modify the template

After running a cover page test, you notice that an adjustment is required. To modify an existing template, navigate to **Project Menu > Template Mgmt > Output Templates** and find the template in the grid. Click the pencil icon under "Tools" and follow the steps below to edit the template:

1. Download the existing XLS file and make the required adjustment(s)
    a. See article for more details on building/adjusting templates: Template Troubleshooting, Tips and Tricks
2. Return to the edit form and delete the existing file
3. Upload the adjusted XLS file and save.





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