

Header and Footer Format

09/16/2024 1:53 pm MDT

To add and edit headers and footers to your documents, navigate to the Main Setup page of your project where available fields are shown in the Formats group > Document Header/Footer Settings.

The screenshot shows the 'Document Header/Footer Settings' dialog box. At the top, there is a 'Formats' section with 'Outgoing File Name Format' and 'Document Header/Footer Settings' (highlighted with a red box). Below this is the 'Document Header/Footer Settings' dialog itself. It has a title bar with 'Document Header/Footer Settings' and a 'How it works?' link. The dialog is divided into several sections: 1. 'Font Size' (set to 8), 'Margin Top' (set to 0), and 'Margin Bottom' (set to 0). 2. 'Header/Footer Output' with radio buttons for 'One Column' (selected) and 'Three Columns'. 3. 'Header format' section with 'Header Text' (containing '<ProjectName>') and 'Header Align' (set to left). 4. A variable selection grid with 'Project Name' highlighted in green. 5. 'Footer format' section with 'Footer Text' and 'Footer Align'. 6. 'Cancel' and 'Save' buttons at the bottom right.

1. **Font** - Default is set to size 8 but can be changed to any other size up to 72.
2. **Margin Top/Margin Bottom** – This setting establishes the distance from page margins. Note that "0" is the shortest distance and subsequent numbers gradually move Header/Footer away.
3. **Header/Footer Output:**
 - a. **One Column:** This will show all the data included in the header and footer in only one column with the selected alignment (left, center, right).
 - b. **Three Columns:** This options allows you to set the data in the header and footer in 3 different columns for each alignment (left, center, right).
 - i. **Troubleshoot multi column headers/footers (add full width white background)**- Only available on Three Columns Output: Column blocks are added in sequence. If there is a lot of text, then the size of one block could overwrite the other column. As a result some of the previous column block may be hidden in the output. If you enable this option, all data is written to one block. Any text

which is too long will be displayed on screen - overwriting other text, you can then identify the conflict and edit the variables/text as required to fix, or put all data into a single block to avoid overwriting.

4. **Document Header/Footer Format** – To edit format, select the desired variables by clicking on each available field, or type text manually. It's also possible to add new variables by creating custom Doc Code/Card fields. For more details about new fields click [here](#).

- i. Data can also be added in more than one line if required, by pressing Enter on your keyboard, in any of the Text fields.
- ii. Parameters are available for use with TagList, Eq_List, SupplierLineNumbers_List variables in header/footers as follows:

i. All="text"

ii. Multiple="text" Example if result is all tags, output will be "All Tags"

Document Header/Footer Settings How it works? x

Font Size: 8
Margin Top: 0
Margin Bottom: 0

Header/Footer Output: One Column Three Columns

Header format

Left Header Text:
Center Header Text:
Right Header Text:

Troubleshoot multi column headers (add full width white background) ?

Footer format

Left Footer Text:
Center Footer Text:
Right Footer Text:

Troubleshoot multi column footers (add full width white background) ?

Cancel Save

iii. Other available parameters are:

i. split("-",X,"Y") where - is delimiter, X is segment (integer), Y is optional parameter, text to replace value in segment in the case if delimiter is not found inside value, or there is no X segment inside value.

ii. count=X where X is integer (or |count(X) or |count(X,"Y")

iii. length(X,"Y") where X is integer, Y is optional parameter, ellipsis

iv. uppercase

v. separator="X", where X is text/symbol

iv. OR operator can also be used to take first non-null value. OR must be in caps and the only two characters between two variables.

v. IF statements are available for Header/Footer formatting.

i. A variable for formatting header/footers based on if a card is Auto-generated or Manually created is available, even though it is not in the selectable values. Type "`<CardType>`" and use the values "Manual" or "Auto". For more information on using IF statements see our article [here](#).

5. **Align** – If using One Column Header/Footer choose between Left, Center and Right alignment.

6. **Save** - Click save after all changes are made.

Non-standard characters supported in Header/Footer

All non-standard characters such as other languages, are now supported in headers and footers.

Formats

Outgoing File Name Format

Type of Format: Single Pattern
File Name Format: <DocNoWolfePA>_r<WolfePARev>.pdf
Suffix added to all comment files: _Comment
Suffix added to all native files: _Native

Document Header Format

<ProjectName>

** Use OR operator to take first non-null value. OR must be in caps, and the only two characters b/w two variables*

Align: Left Offset: 0

Document Footer Format

Document No. / № документа: <DocNoCustomer>

** Use OR operator to take first non-null value. OR must be in caps, and the only two characters b/w two variables*

Align: Left Offset: 0

Output Doc Settings

Page Size Format: ANSI A Submittal Count Format: ###
Wolfe PA Rev # Format: ###
 Show header/footer on cover pages

Show header/footer on cover pages – Be sure to mark the checkbox if you wish to use the header and footer format also in the cover pages.

Output Doc Settings

Page Size Format: ANSI A Submittal Count Format: #
Rev # (SCG) Format: #
 Show header/footer on cover pages

Note: When a document doesn't change (i.e. new version is not updated), the system will NOT re-apply the header footer. This usually happens when re-sending the documents received from the customer for final approval.

To edit the setting on a specific submittal, you can check the "Add Header/Footer" checkbox on the submittal window.

Start Transmittal

Add Header/Footer	Doc Code	Card Name(Auto) 1	Level	Stage
<input checked="" type="checkbox"/>	I04 Inspection and Test Plan	I04.4413807710	Order	IFA

No more pages | Show on Page: 20 | Items on page: 1

Transmittal Settings

Transmittal Number: T-004 Transmittal Date: 10/15/2019 09:11:14 Sequence: 4

Transmittal Comments:
Turn around: 10 (working days)

Distribution List:
Include markups:

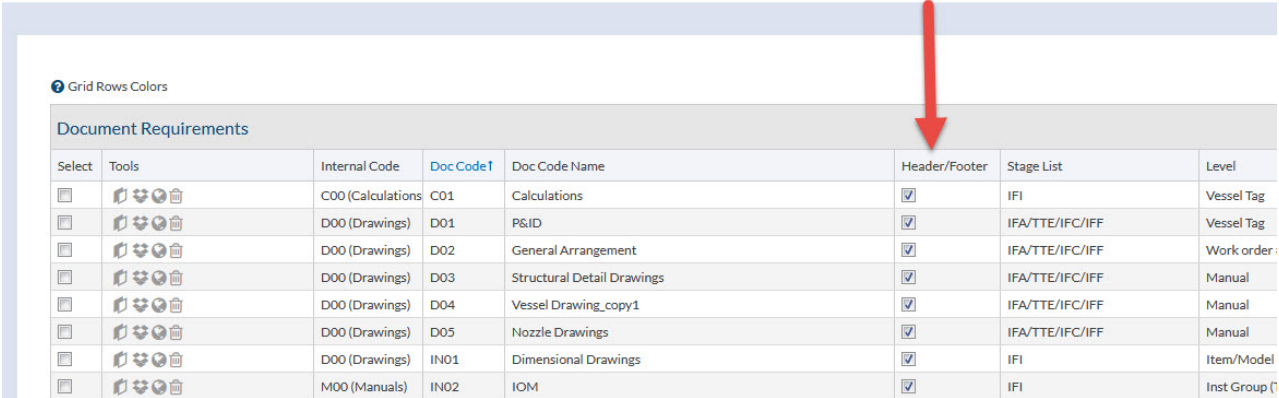
Send transmittal email notification

You can edit this setting on each card prior to the submittal window if you prefer.

If you wish to toggle the header/footer for all cards for a doc code, you can do that on the code list.

Cards

Code List (Requirements)



Grid Rows Colors

Document Requirements							
Select	Tools	Internal Code	Doc Code	Doc Code Name	Header/Footer	Stage List	Level
<input type="checkbox"/>		C00 (Calculations)	C01	Calculations	<input checked="" type="checkbox"/>	IFI	Vessel Tag
<input type="checkbox"/>		D00 (Drawings)	D01	P&ID	<input checked="" type="checkbox"/>	IFA/TTE/IFC/IFF	Vessel Tag
<input type="checkbox"/>		D00 (Drawings)	D02	General Arrangement	<input checked="" type="checkbox"/>	IFA/TTE/IFC/IFF	Work order
<input type="checkbox"/>		D00 (Drawings)	D03	Structural Detail Drawings	<input checked="" type="checkbox"/>	IFA/TTE/IFC/IFF	Manual
<input type="checkbox"/>		D00 (Drawings)	D04	Vessel Drawing_copy1	<input checked="" type="checkbox"/>	IFA/TTE/IFC/IFF	Manual
<input type="checkbox"/>		D00 (Drawings)	D05	Nozzle Drawings	<input checked="" type="checkbox"/>	IFA/TTE/IFC/IFF	Manual
<input type="checkbox"/>		D00 (Drawings)	IN01	Dimensional Drawings	<input checked="" type="checkbox"/>	IFI	Item/Model
<input type="checkbox"/>		M00 (Manuals)	IN02	IOM	<input checked="" type="checkbox"/>	IFI	Inst Group

* **Note** that if you want to immediately apply the change to all cards for that code (if the file is already uploaded to the card) you must select the code and click **Apply to Cards** (button at bottom) after you make the setting in the code list.