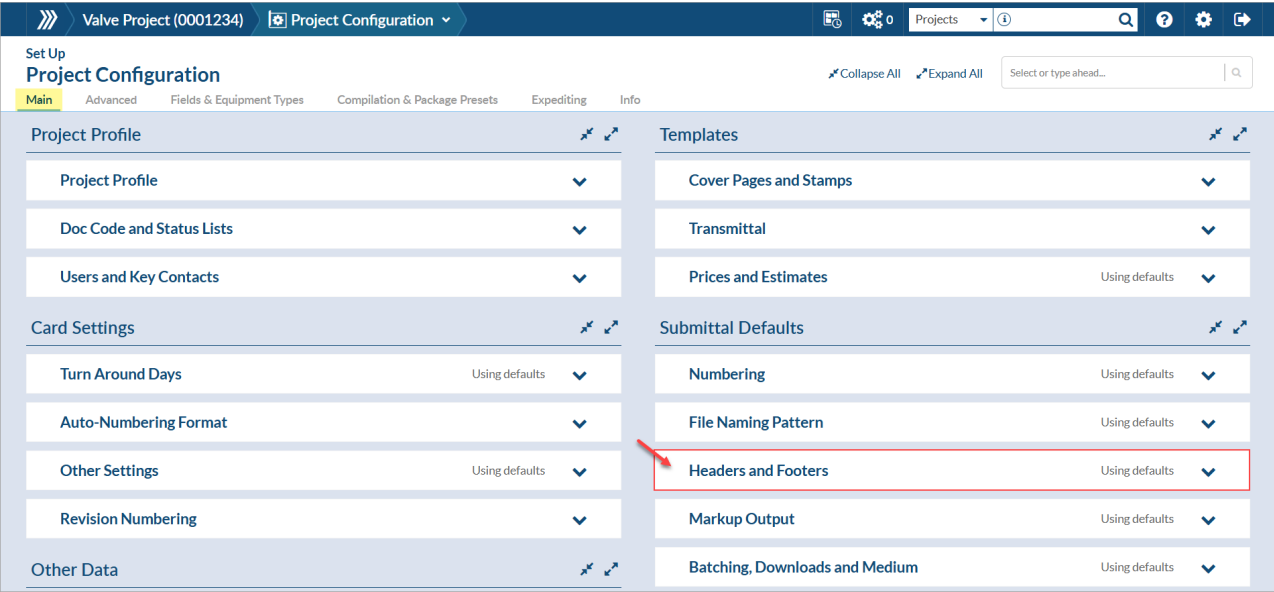


Header and Footer Format

10/02/2025 4:53 pm MDT

Headers and footers can be added to documents to provide information consistently on every page. In addition to automatically generated page numbering, this feature can be used to display document-specific information (e.g., card name, doc no., equipment list, etc.), and/or project-specific information (e.g., project name, PO no., etc.).

To add and edit headers and footers to your documents, navigate to the "Main" tab of the **Project Configuration** page. The "Headers and Footers" section can be found in the "Submittal Defaults" area.



Headers and Footers

Font size

9

Margin top

0

Margin bottom

0

☒ Show header/footer on cover pages

Header/footer output

☐ One column
 ☒ Three columns

Left header text

+ Add variable

Center header text

+ Add variable

Right header text

+ Add variable

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

Left footer text

+ Add variable

Center footer text

+ Add variable

Right footer text

+ Add variable

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

1. **Font** - Default is set to size 8, but can range anywhere from size 6 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).
4. **Document Header/Footer Format:** Explained below in detail.
5. **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.

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](#).

The screenshot shows the 'Document Header/Footer Format' editor. On the left, there are three text input fields for 'Left header text', 'Center header text', and 'Right header text'. The 'Left header text' field contains '<ProjectName>'. The 'Center header text' field contains '<PONumber>'. The 'Right header text' field contains '<DocNoOmega>OR<DocNoChemC>'. To the right of these fields is a 'Search variable' dropdown menu. The dropdown is open, showing a list of variables: Description, Description List, Discipline, Doc Code, Doc No. (Chem C), Doc No. (End User - ABC), Doc No. (Omega), Doc No. (Sub-Supplier), and Eq # List. Each variable has a '+' icon to its right. At the bottom of the dropdown is a '+ Add variable' button.

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

- a. All="text"
- b. Multiple="text"

The screenshot shows the 'Document Header/Footer Format' editor with the 'Right header text' field highlighted. The field contains '<TagNoList|All="All Tags">'. A red arrow points to the '|All="All Tags">' part of the variable. To the right of the field is a '+ Add variable' button.

3. Other available parameters are:
 - a. 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.
 - b. count=X where X is integer (or |count(X) or |count(X,"Y")
 - c. length(X,"Y") where X is integer, Y is optional parameter, ellipsis
 - d. uppercase

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

4. 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.

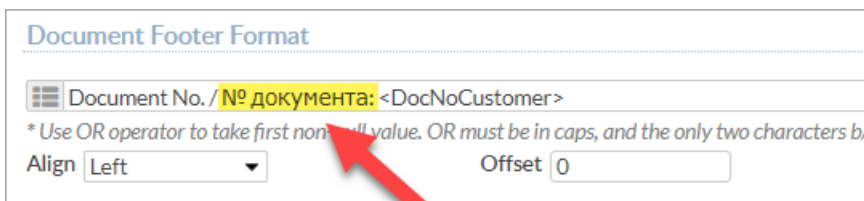
5. IF statements are available for Header/Footer formatting.

a. For more information on using IF statements, see our support article: [Using IF statements](#).

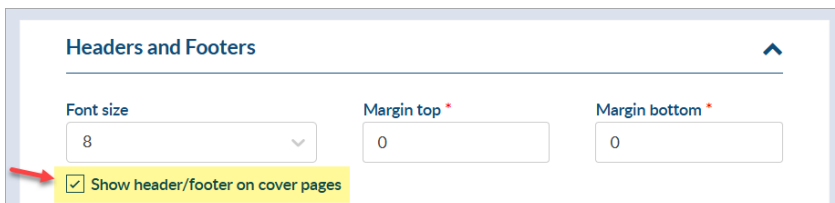
b. *Note: A variable for formatting header/footers based on if a card is Auto-generated or Manually created is available, but the option is not displayed as a selectable value. To use this option, type "<CardType>" and use the values "Manual" or "Auto".*

Non-standard characters supported in Header/Footer

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

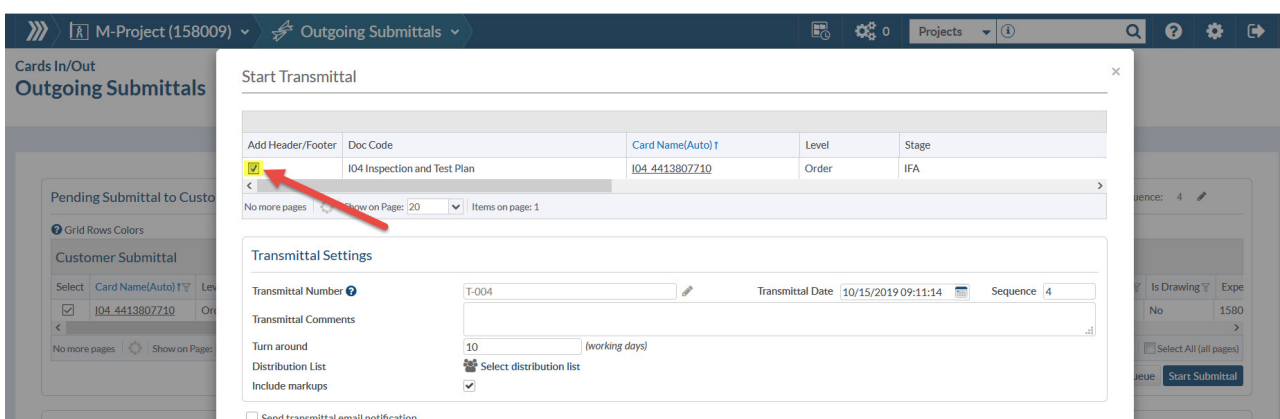


Show header/footer on cover pages – Be sure to mark the checkbox if you wish to use the header and footer format also in the cover pages.



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.



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.

Header/footer settings can also be pre-defined on project configuration templates (System Menu > Admin > Customization > Project Config. Templates) from the "Main" tab.

CustomizationProject Config. Templates

Admin / CustomizationProject Configuration Template: Default Project Fields Template

MainAdvancedFields & Equipment TypesCompilation & Package PresetsExpeditingInfo

Project Profile

Project Profile

Doc Code and Status Lists

Users and Key Contacts

Card Settings

Turn Around Days

Auto-Numbering Format

Other Settings

Revision Numbering

Other Data

Templates

Cover Pages and Stamps

Transmittal

Prices and Estimates

Submittal Defaults

Numbering

File Naming Pattern

Headers and Footers

Markup Output

Batching, Downloads and Medium