

Header and Footer Format

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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 'Main Setup' page with a 'Set Up Main' tab. The 'Formats' group is expanded, showing various settings. The 'Headers and Footers' option is highlighted with a red box and a red arrow pointing to it. The 'Project Settings' group includes: Project Profile, Doc Code and Status Lists, Users and Key Contacts, Turn Around Days, Document Auto-Numbering Format, Document Revision Settings, and Prices and Estimates. The 'Templates' group includes: Cover Pages and Stamps, Transmittal, Submittal Defaults, Numbering, File Naming Pattern, Headers and Footers, and Markup Output.

The screenshot shows the 'Headers and Footers' settings page. The page is divided into sections for headers and footers. The 'Font size' is set to 9 (callout 1). The 'Margin top' and 'Margin bottom' are both set to 0 (callout 2). The 'Header/footer output' is set to 'Three columns' (callout 3). The 'Left header text', 'Center header text', and 'Right header text' fields are empty, each with an 'Add variable' button (callout 4). The 'Troubleshoot multi column headers (add full width white background)' checkbox is unchecked. The 'Left footer text', 'Center footer text', and 'Right footer text' fields are empty, each with an 'Add variable' button. The 'Troubleshoot multi column footers (add full width white background)' checkbox is unchecked (callout 5).

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).
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](#).

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)

<ProjectName>

<PONumber>

<DocNoAcme>OR<DocNoWolfe>

CardName(Auto) Current Date Doc Code Doc No. (Acme) Doc No. (End User) Doc No. (Sub-Supplier)

Doc No. (Wolfe) Eq # List File Extension Job Line No. List (Acme) Line No. List (Wolfe) Other Data1 Other Data2

Other Data3 Other Data4 Other Data5 Other Data6 Page Number PO No. List (Acme) PO Number

PO Rev No. List (Acme) Project Name Reference Rev # (Demo) Sales Order/Quote Tag No. List Title Total Pages

* available variables

Footer format?

Left Footer Text
Center Footer Text
Right Footer Text
☐ Troubleshoot multi column footers (add full width white background)

Cancel

Save

- 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? ✕

Font Size

Margin Top

Margin Bottom

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) ?

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

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

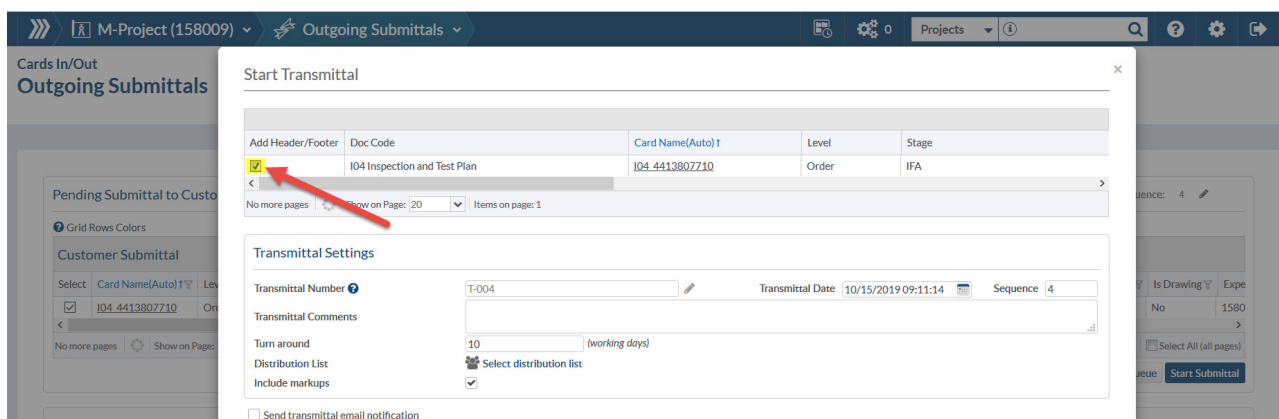
Show header/footer on cover pages – Be sure to mark the checkbox if you wish to use the header and footer format also in the cover pages.

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.



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.

Code List (Requirements)

Grid Rows Colors

Document Requirements

Select	Tools	Internal Code	Doc Code1	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.