Templates Manual

July 2024

Contents

Overview

This training covers **Output Templates**, which are different from other types of templates used in DocBoss, such as **Project Templates**.

From the settings gear in the top right of your screen, select Template Management > Output Templates.

There are two grids on this page, and they relate to different types of templates.

PDF/CSV/XLS Templates: These templates are used to generate the following types of documents:

- Compilation (Cover Page, Title Page, and Table of Contents)
- Document Cover Page
- Document Index (SDI Report)
- Estimation (for Prices & Estimates)
- Stamp
- Transmittals

Email Templates: These templates are used to format emails that are sent out of DocBoss. They include:

- Submittals
- Expedite Requests

Email templates are not covered in this training guide. Information about email templates is available in [our documentation](#).

There is also a section below the template grids to allow users to upload various logos which can be used in templates. As well, the **Instance Logo** is used on the file download page when submittals are delivered with file hyperlinks.

PDF/CSV/XLS Templates

PDF/CSV/XLS templates refers to the available *output* formats for these templates.

- **PDF:** Most common – used for document cover pages, transmittals, and compilation cover/title pages.
- **CSV/XLS:** Most often used to output SDI Reports (document indexes) in a format that can be manipulated in Excel.

These templates can be uploaded to DocBoss in the following formats:

- **Excel:** This is used for the majority of output templates in DocBoss and provides lots of flexibility for formatting.
    - o Note that we have created updated Excel templates to replace many of our existing LaTeX templates, and can provide these files on request to any customer who wishes to use/modify them.

- **CSV:** Similar to Excel, but does not include many of the formatting options Excel provides.
- **LaTeX:** This is a programming language that is used to build more complicated templates in DocBoss such as compilation table of contents. We will not be covering this in training and don't expect our users to be able to edit LaTeX templates themselves. In the (unlikely) event that none of the other options will suit your needs and a custom LaTeX template needs to be built, DocBoss can provide this as a billable service.

If you receive a template from your customer in Word or PDF format, this will first need to be converted to Excel so that DocBoss can process it.

Existing Templates

New DocBoss instances come with a full set of existing templates for you to use. If you like our defaults as they are and never have any customer requests to use their templates, then you will have all the templates you need.

If your company is already using DocBoss, they will likely have existing custom templates. Your DocBoss administrator is the best person to talk to about what templates to use in different projects. You may want to take some time to explore the existing custom templates on your instance to see what is available. Templates added by your colleagues will typically have their name listed as the "Owner" of the template.

Sort and Filter

There are many options to view templates within the PDF/Excel templates grid.

Note the text search and customer filter options above the grid.

Type: What the template will be used for (cover page, transmittal, etc.).

Name: Name of the template. Helpful to keep it rather short as this is what will appear in the dropdown menus.

Description: You can just copy the template name to this field or you can write a longer description of what situations the template will be used for. This is helpful if someone is looking at the template in the future and wants to know why certain formatting was used.

Template Format: The format of the template file (i.e. whatever format the template was created in)

Output Format: The format(s) DocBoss can output the template to

Owner: The user who added the template to DocBoss

Default for Project: If checked, this template will be pre-selected on new projects, unless overridden by a selection in the project template.

No. of open Projects: Displays a count of the number of open projects this template is currently in use on. Clicking on the number will open a list of the individual projects on which the template is used.

Download an Existing Template

To download an existing template, select the magnifying glass icon under the Tools column.

☐ Download the default document cover page template

Converting to Excel

The formatting required by the user is to ensure the template is in Excel format. If your customer has provided a Word or PDF version of the template, there are instructions to convert this on the DocBoss support site, but these can also be sent to DocBoss support to convert for you.

Variables

DocBoss templates use **variables** to tell DocBoss which fields to pull information from.

Plain text entered on a template is output the same way every time the template is generated.

Variable text, indicated by greater than and less than symbols (< and >) for PDF/CSV/XLS templates, is replaced with information specific to the document being generated.

For example, a cover page will likely require information related to the project (project name, customer name, etc.) and information related to that specific card (document numbers, linked equipment list, revision history, etc.). When generating a submittal, DocBoss will replace the variable text on cover pages with data that is pulled from the relevant project and cards so that the user does not have to manually enter this information.

Parameters

Variables can be modified using parameters.

The most common example is the **AutoHeight** parameter, which functions similar to wrap text in Excel.

Parameters are added after the variable name, before the greater than (>) sign. A vertical bar (|) is added to separate the variable from the parameter, and to separate multiple parameters if more than one is used. For example, to add the **AutoHeight** parameter to the variable for **<Project_Name>**, a user would type **<Project_Name|AutoHeight>**.

Formulas

Excel formulas can be used in templates to set up specific formatting that is not otherwise available.

Variables can be used inside of Excel formulas. For more information, see our Support site.

Page size

Cover pages use the page size from the project settings.

Transmittals and SDI reports use the page size from the template.

Template Instructions sheet

The template instructions file is the repository for all possible variables that can be used in DocBoss templates.

Download Updated Template Instructions

To download the most recent version of the template instruction file, select the plus symbol (+) on the top right of the **PDF/CSV/XLS Templates** grid. This will open the **Create Template** popup. From this popup, select "Download instructions for XLS(x) templates" and open the file.

☐   Download the instructions for XLS(x) templates

As we occasionally update this file with new variables, you may want to download a new copy periodically.

Using Template Instructions

You will notice there are several tabs on the template instructions file. It is separated into general variables (most of which are project-level info) and variables specific to the template type. Ensure that the worksheet you are on is consistent with the template type you're using.

There is also a worksheet at the end of the file that explains all of the available parameters for modifying variables.

Cover Page Templates

Cover Page templates are used for individual documents and compilations.

Preparing Cover Page Templates

There are three basic ways to approach this:

1. Your customer has provided you with a cover page they require you to use (most common)
2. You want to make changes to an existing template
3. You want to build a new template from scratch (least common)

Formatting
It is best to keep the formatting simple:

- Arial font
- No special programming (the document inspector in Excel is a good indicator of document properties which may cause issues generating templates)

Variables
There are two tabs on the template instructions sheet which are relevant to Cover Pages: General Variables and Cover Page Variables. You will use a combination of these to replace the information on the template.

Parameters
Parameters are available on the last worksheet of the instruction file.

These are primarily ways to filter information or change the format it is displayed in.

If the default output a variable provides is not as you need it, then you would look for the appropriate parameter.

Testing Cover Page Templates

Upload
Note that templates can also be uploaded to individual customer profiles (not covered here).

To upload your template to DocBoss, navigate from the system menu to the **Template Mgmt** > **Output Templates** screen. In the **PDF/CSV/XLS Templates** grid, select the plus symbol (+) in the top right to add a new template.

Set the type as **Document Cover Page**.

Cover Page Test
From the **Card List** in a project, select the **History** (clock) icon under **Tools** for the card you wish to test the cover page on.

From the history screen, in the top right of the page, select **Cover page test**. Choose the applicable cover page from the dropdown on the popup, and generate. The result will download as a PDF when it is complete.

SDI Report Templates

SDI Report templates are used in DocBoss to generate document indexes and similar reports. Essentially, these take the information from your Card List grid and export it into a customized format. There are default templates available in DocBoss, as with all of our template types. However, you may have an internal document tracker that is required in a specific format, or your customer may provide you with a document index format they require you to use.

Preparing Document Index Templates

Formatting
The same formatting basics apply as with cover page templates (explained above).

Variables
The variables for SDI reports are a little different than with cover pages.

Variables which can be used:

- General variables: anything related to the project as a whole. Typically goes in the header.
- Index variables: information related to specific cards.

Parameters
Same as with cover pages.

Testing Document Index Templates
Before using a template, you always want to test it to be sure that it outputs in the way you expect.

Upload

To upload your template to DocBoss, navigate from the system menu to the **Template Mgmt** > **Output Templates** screen. In the **PDF/CSV/XLS Templates** grid, select the plus symbol (+) in the top right to add a new template.

Complete the required fields, being sure to set the template type as **Document Index**.

Add to Project and Generate

To test the template, open one of your projects. If you have custom fields included in the template, you may wish to test the template in a project it will actually be used on so it is easier to check that the information is displaying as you want it to.

From the project menu, select **Index Reports & Compilations**.

Download Example Templates

While you are learning how to create templates, you may find it helpful to copy and paste the variables into your customers' templates from one of the example templates available in DocBoss.

- ☐ Select the + to open the "Create Template" popup
- ☐ Select Document Cover Page template type
- ☐ Download the example cover pages file

Additional Resources

For additional information on templates, see our documentation.