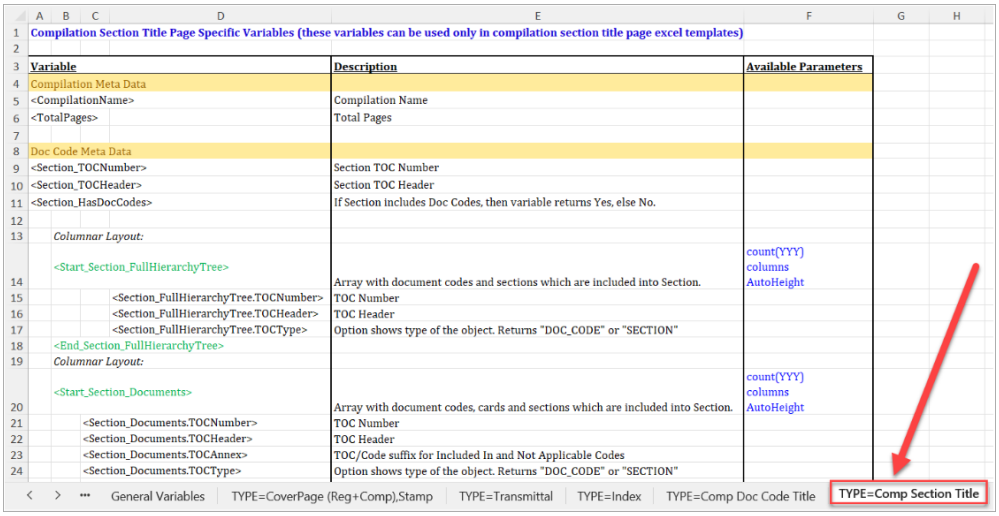
Use Pre-Established Table of Contents Template

05/20/2025 10:34 am MDT

If the customer provides a pre-established XLS template to use on a project, you can use it instead of using the default template. To use the XLS template, values will need to be replaced with general and/or section title page variables from the "TYPE=Comp Section Title" tab of the template variables sheet. For more information about template preparation, see section below.



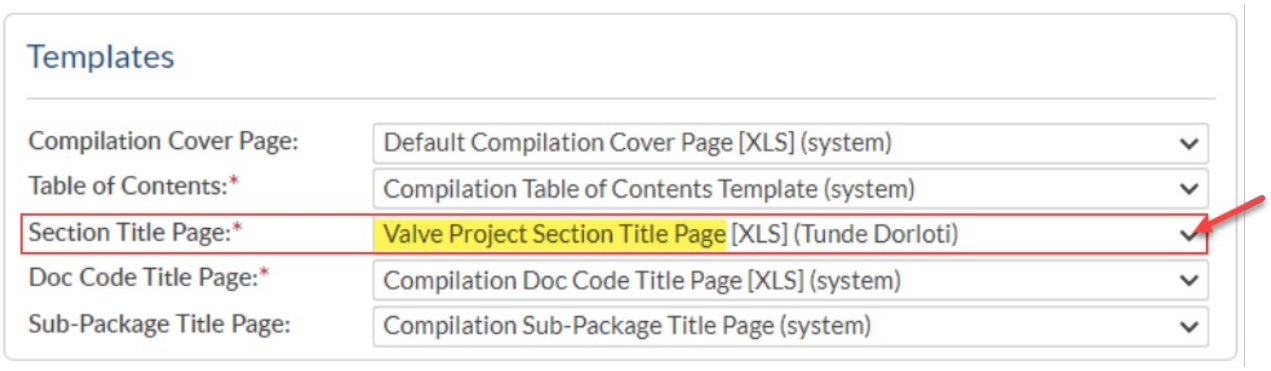
	A	B	C	D	E	F	G	H
1	**Compilation Section Title Page Specific Variables (these variables can be used only in compilation section title page excel templates)**							
2								
3	**Variable**				**Description**	**Available Parameters**		
4	Compilation Meta Data							
5	<CompilationName>				Compilation Name			
6	<TotalPages>				Total Pages			
7								
8	Doc Code Meta Data							
9	<Section_TOCNumber>				Section TOC Number			
10	<Section_TOCHeader>				Section TOC Header			
11	<Section_HasDocCodes>				If Section includes Doc Codes, then variable returns Yes, else No.			
12								
13		*Columnar Layout:*						
14				<Start_Section_FullHierarchyTree>	Array with document codes and sections which are included into Section.	count(YYY) columns AutoHeight		
15				<Section_FullHierarchyTree.TOCNumber>	TOC Number			
16				<Section_FullHierarchyTree.TOCHeader>	TOC Header			
17				<Section_FullHierarchyTree.TOCType>	Option shows type of the object. Returns "DOC_CODE" or "SECTION"			
18		<End_Section_FullHierarchyTree>						
19		*Columnar Layout:*						
20				<Start_Section_Documents>	Array with document codes, cards and sections which are included into Section.	count(YYY) columns AutoHeight		
21				<Section_Documents.TOCNumber>	TOC Number			
22				<Section_Documents.TOCHeader>	TOC Header			
23				<Section_Documents.TOCAnnex>	TOC/Code suffix for Included In and Not Applicable Codes			
24				<Section_Documents.TOCType>	Option shows type of the object. Returns "DOC_CODE" or "SECTION"			

General Variables | TYPE=CoverPage (Reg+Comp),Stamp | TYPE=Transmittal | TYPE=Index | TYPE=Comp Doc Code Title | TYPE=Comp Section Title

Select a Section Title Page Template

First, you will need to prepare the template and upload it the DocBoss (see article for instructions: Upload Templates into DocBoss). For the template type, select "Compilation Section Title Page."

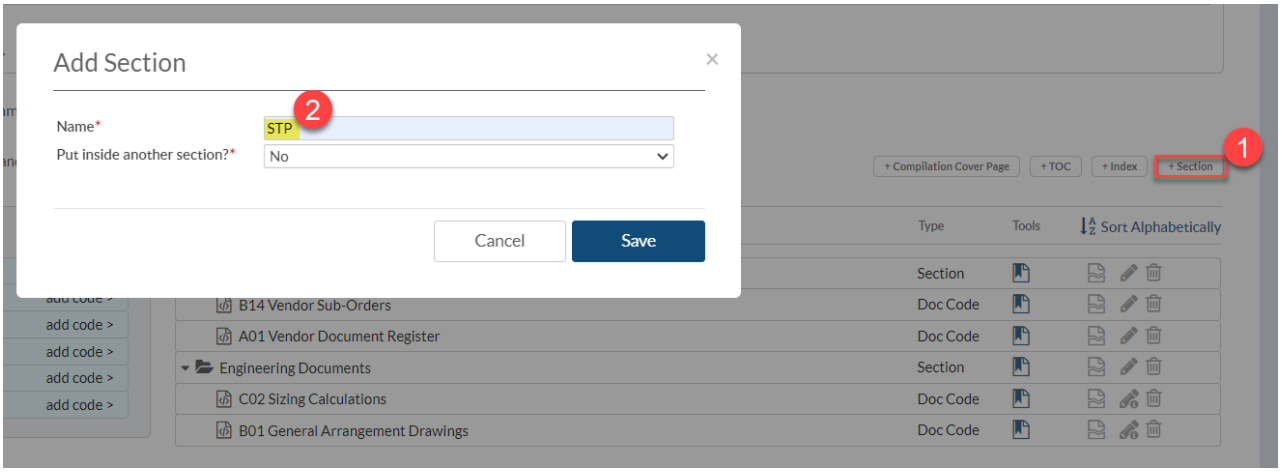
Once uploaded, select this template to be used on the compilation editing screen (Project Menu > Index Reports & Compilations > [*Compilation Name*] > Templates).



Manage Document Codes and Sections

Because a customer-provided template is being used, the system-generated table of contents will need to be removed. From the "Document Codes and Sections" area of the compilation editing screen, delete the table of contents from the compilation structure.

Once the table of contents is removed, create a new section by clicking the "+ Section" button above the grid. Give the new section a name, and leave the "Put inside another section?" option to "No".

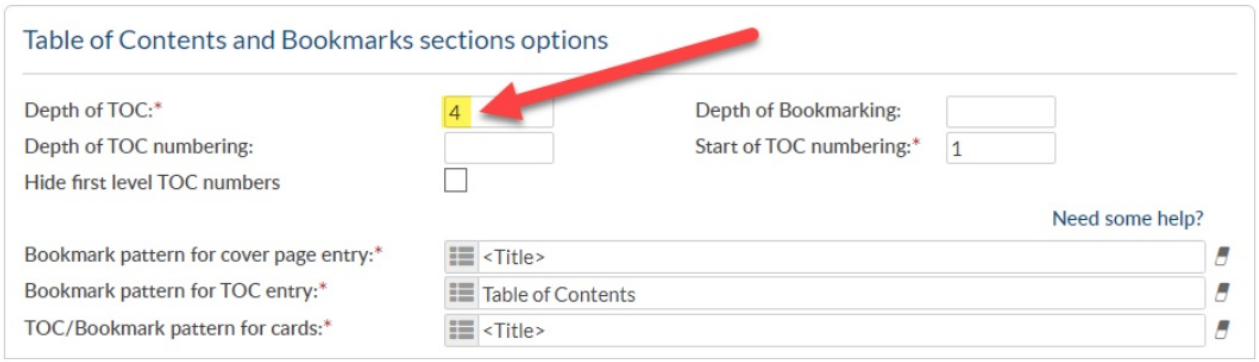


The section name will not appear in the table of contents but will be included in the bookmarks of the generated compilation.

Once the section is created, move the entire compilation structure (cards, sections, etc.) into the new section. To do this, hold CTRL (or SHIFT) and use the left mouse click to select multiple items. Once selected, click and drag the selected items into the section.

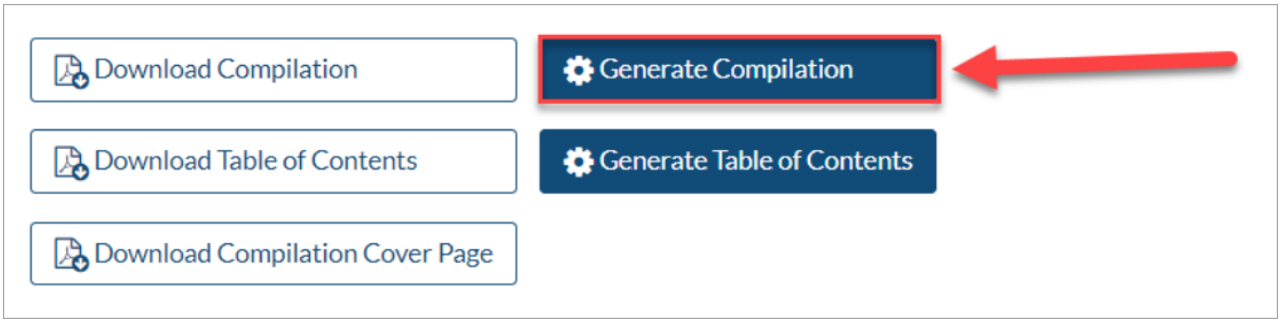
Update Depth of TOC

With the new section introducing an additional depth level to the compilation structure, the TOC depth should be increased to ensure all information is displayed in the output.



Generate Compilation (Result)

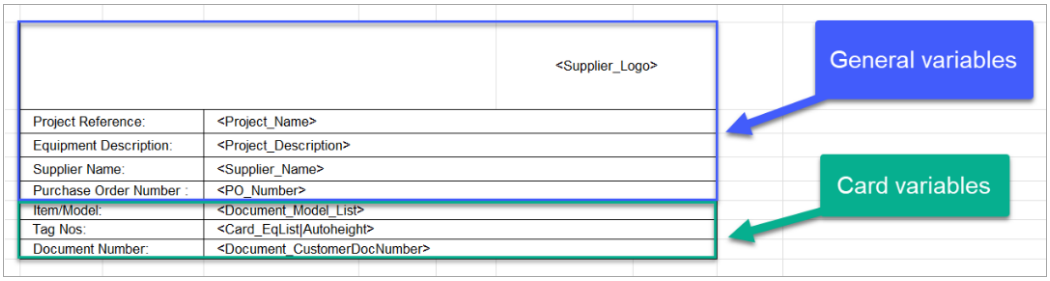
Because the separate system-generated table of contents is no longer in the compilation structure, the entire compilation must be generated to see the result of the above steps.



To see specific card details (e.g., doc numbers, etc.), the compilation must be linked to the doc code. For instructions on linking a compilation to a doc code, see this article: Attach Compilation/TOC to a Doc Code.

Variables

To prepare a pre-established TOC template, general and/or section title page variables from the "TYPE=Comp Section Title" tab can be used.



Content Layout Options

1. Full Hierarchy Tree arrays

The TOC Number and TOC Header variables included within the <Start_Section_FullHierarchyTree> and <End_Section_FullHierarchyTree> arrays will display the included document codes and section.

Doc Code Meta Data	
<Section_TOCNumber>	Section TOC Number
<Section_TOCHeader>	Section TOC Header
<Section_HasDocCodes>	If Section includes Doc Codes, then variable returns Yes, else No.
Columnar Layout:	
<Start_Section_FullHierarchyTree>	Array with document codes and sections which are included into Section.
<Section_FullHierarchyTree.TOCNumber>	TOC Number
<Section_FullHierarchyTree.TOCHeader>	TOC Header
<Section_FullHierarchyTree.TOCType>	Option shows type of the object. Returns "DOC_CODE" or "SECTION"
<End_Section_FullHierarchyTree>	

Result (Example):

Section	Description	Page No.
1.1	General Documents	2
1.1.1	B14 - Vendor Sub-Orders	3
1.1.2	A01 - Vendor Document Register	4
1.2	Engineering Documents	5
1.2.1	C02 - Sizing Calculations	6
1.2.2	B01 - General Arrangement Drawings	8

Section

Doc Code

2. Section Documents arrays

The variables included within the <Start_Section_Documents> and <End_Section_Documents> arrays will display the compilation structure hierarchy (including the cards).

Columnar Layout:	
<Start_Section_Documents>	Array with document codes, cards and sections which are included into Section.
<Section_Documents.TOCNumber>	TOC Number
<Section_Documents.TOCHeader>	TOC Header
<Section_Documents.TOCAnnex>	TOC/Code suffix for Included In and Not Applicable Codes
<Section_Documents.TOCType>	Option shows type of the object. Returns "DOC_CODE" or "SECTION"
<Section_Documents.DocCode>	Primary Document Code
<Section_Documents.IncludedCode>	String with doc codes which are included into Card
<Section_Documents.StageAbbr>	Document Current Stage abbribiation
<Section_Documents.Title>	Document Title
<Section_Documents.SupplierDocNumber>	Document Supplier Doc Number
<Section_Documents.CustomerDocNumber>	Document Customer Doc Number
<Section_Documents.EndUserDocNumber>	Document End User Doc Number
<Section_Documents.SubSupplierDocNumber>	Document Sub-Supplier Doc Number
<Section_Documents.DocCodeSupplierDocNumberList>	List of all Supplier Doc Numbers for Doc Code.. Value is empty for section.
<Section_Documents.DocCodeCustomerDocNumberList>	List of all Customer Doc Numbers for Doc Code.. Value is empty for section.
<Section_Documents.CustFieldX>	Document Custom FieldX, X is ID of custom Doc Code / Card Field. Value is empty for non-card objects.
<Section_Documents.PageStartShow>	Page number
<Section_Documents.DocumentPages>	Document Pages Count (including Cover Sheets). Value is empty for non-card objects.
<End_Section_Documents>	

Result (Example):

Section	Description	Customer Doc Number	Page No.
1.1	General Documents		2
1.1.1	B14 - Vendor Sub-Orders		3
1.1.1.1	Vendor Sub-Orders	1234-B14-5	
1.1.2	A01 - Vendor Document Register		5

Section

Doc Code

Card

3. Order Data Source arrays

The variables included within the <Start_AllUnits|highOrderDataSource(Section_Documents)> and <End_AllUnits> arrays will list information related to all equipment data. These arrays should be used within the <Start_Section_Documents> and <End_Section_Documents> arrays in order to cross-reference card variables with the equipment units.

Columnar Layout:	
<Start_Section_Documents>	Array with document codes, cards and sections which are included into Section.
<Start_AllUnits|highOrderDataSource(Section_Documents>	Array with document units Every unit is shows, regarldess of duplicate equiment number values. i.e. If Tag is set as equipment number, and Tag1 is used on 5 equipment unit rows, there will be 5 rows in this output for Tag1. Array with list of ALL equipment units. Each value is treated separately. It is possible to show only units with unique set of variables using distinct parameter. Not listed in the parameter variables will be empty. Example of applying "distinct" parameter: <Start_AllUnits|HighOrderDataSource(Section_Documents)|distinct(Model, Tag)> It is possible to define own sorting rule using sortBy or (and) SortOrder paratemers
<AllUnits.SupplierLineNumber>	Supplier Line Number Value
<AllUnits.CustomerLineNumber>	Customer Line Number Value
<AllUnits.Model>	Item/Model Value
<AllUnits.Tag>	Tag Value
<AllUnits.SubSupplier>	Sub-Supplier Value
<AllUnits.CustomerPoNumber>	Customer PO Number Value
<AllUnits.CustomerPoRevNumber>	Customer PO REV Value
<AllUnits.ShipDate>	Shipment Date
<AllUnits.Milestone>	Milestone Date
<AllUnits.MajorTag1>	MajorTag1 Value
<AllUnits.CustomX>	CustomX Value (X is ID of custom Equipment Field)
<AllUnits.CombinationUnitX>	CombinationUnitX Value (X is ID of CombinationUnit Field, integer starting from 1)
<End_AllUnits>	
<End_Section_Documents>	

Result (Example):

SIZING CALCULATIONS INDEX

Item	Tag Number	Item/Model	Page No.
1	Tag1	Needle Steel Valve	2
2	Tag2	Needle Steel Valve	3
3	Tag3	Needle Steel Valve	4
4	Tag4	Needle Steel Valve	11
5	Tag5	Globe Steel Valve	12
6	Tag6	Globe Steel Valve	13
7	Tag7	Globe Steel Valve	18
8	Tag8	Globe Steel Valve	19
9	Tag9	Globe Steel Valve	23
10	Tag10	Butterfly Valve	24
11	Tag11	Butterfly Valve	25
12	Tag12	Butterfly Valve	26
13	Tag13	Butterfly Valve	27
14	Tag15	Butterfly Valve	28
15	Tag15	Butterfly Valve	28

This layout is helpful for creating an index for packages of engineering documents (e.g., drawings, data sheets, calculations, etc.) to list the equipment units with the applicable page number of each document.