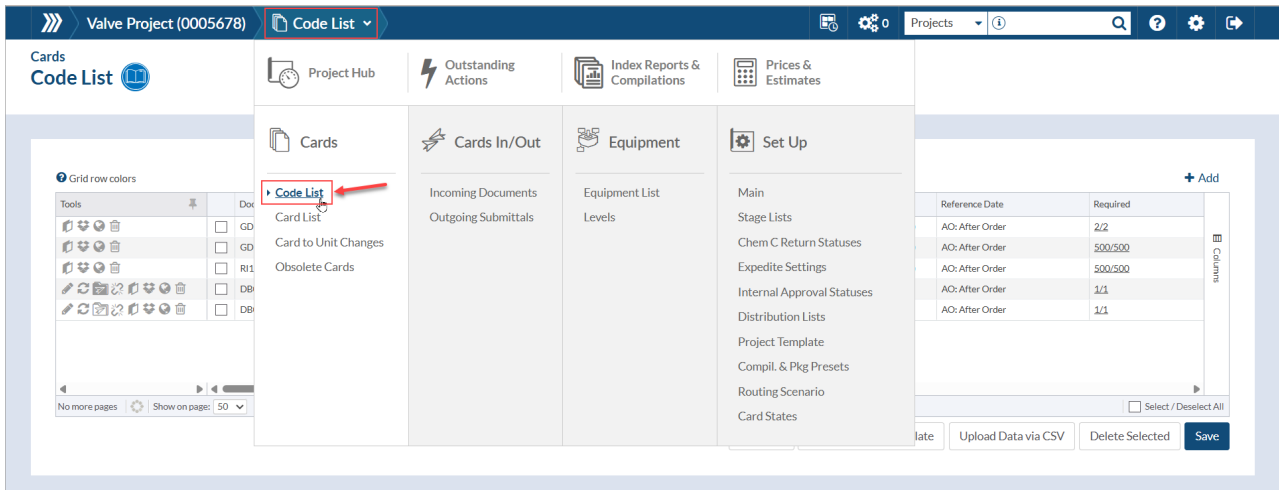


Change Compilation Level

08/27/2025 3:56 pm MDT

Though compilations are commonly generated at the order level, they can be generated per any equipment field (including custom fields!). To begin, navigate to **Project Menu > Cards > Code List**.

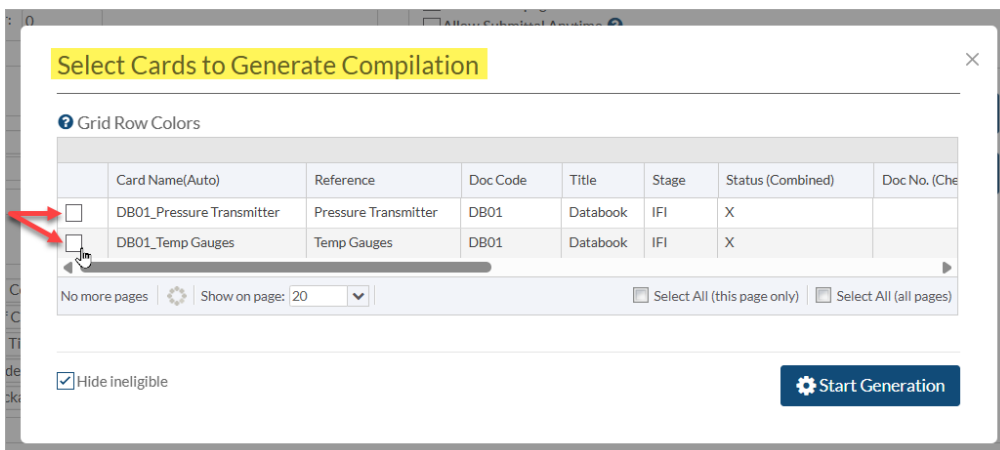


For instructions on how to set a level, see this article: [Configure Doc Code List](#).

Once the level is set to the desired value, the compilation must be attached to the doc code in order to generate the appropriate compilation cards (i.e., cards that include only the documents belonging to the selected equipment field). For instructions on attaching a compilation to a doc code, see this article: [Attach Compilation/TOC to a Doc Code](#).

Example: If the compilation level is set to "Tag," a compilation will be generated for each tag number, with each compilation including only the cards linked to the applicable tag number.

When the compilation level results in more than one compilation being generated, a pop-up will appear each time the compilation is regenerated. This pop-up is where you will select the cards that need to be re-generated. For more information about card regeneration, see this article: [Regenerate Compilation](#).



Compilations per Major Tag (Manual Level)

If your customer requires that compilations are generated per Major Tag, and the cards included within the compilations include **both levels of equipment (Major Tags and Tagged Equipment Units)**, we recommend setting the compilation level to "Major Tag."

In the case that the Card List is built entirely with manual cards, setting the compilation level to "Major Tag" is still recommended in order to auto-generate compilation cards, which in effect crosses the hierarchy of major tags/equipment tag and ensures that all applicable cards get included as part of the compilation(s).



There is the option to set the compilation level to "Manual," but in doing so, the compilation will include **only the cards linked to Major Tag units** and exclude cards which have been linked to Tagged Equipment Units.
