Compilation Structure & Styling Presets

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DocBoss uses presets to define various setting defaults for NEW compilations and packages created on a given project. Presets are defined on the project template, and once the project is created, the defaults are reflected.

Users of different groups, project types or affiliates may wish to have different default settings apply to new compilations and packages, and these compilation/package presets can be created by navigating to **System Menu > Admin > Compil. & Pkg Presets**.

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Manage Users	Companies	General	Customization
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Manage Sub-Supplier Accounts	Relationships	Stage Lists	Doc Code/Card Fields
	Jobs	Distribution Lists	Equipment Fields
		2 Compil. & Pkg Presets	Library Card Fields
-BA	R	Queries List	Custom Lists (for Fields)
Library	Reports	Custom Levels	Project Templates
Manage Library	Project Metrics	Routing Scenario	Labels
Library Document Types	Assignment Activity	Generation Status	
		Other Lists	Template Mgmt
			Output Templates
			Allow support to access your acco

Create (and Apply) Presets

1. Choose to create either a compilation or package preset.

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2. Name your preset, and set the default values according to requirements.

3. Once settings reflect requirements, save the preset.

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		Table of Contents and Bookmarks Sections Options	~
		Compilation Structure Options	~
		Templates	~
			3
			Cancel Save

4. Navigate to **System Menu > Admin > Customization > Project Templates.**Open a project template and select the desired preset for both compilations and packages.

Admin / Customization Project Templates: Default Project Fields Template 2 General Project Settings Submittal Settings Doc Code/Card Fields Major Tag Field Additional Unit Types Combination Fields Project Mainy Fields Doc Code Queries Expediting Settings Doc Code Queries Expediting Settings Complete on Upload Vis Complete on Upload Vis Numbering	💓 😨 Customization	Project Templates 🗸	E	0 80	Projects	• (i)	Q	8	٠	•
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Update Preset Values (on Project)

Once a project has started, the presets on the project can be updated as-needed. These changes can be made by navigating to **Project Menu > Set Up > Compil. & Pkg Presets**.

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Set Up Compil. & Pkg Presets Compilation Presets Package Presets	Project Hub	Outstanding Actions	Index Reports & Compilations	Prices & Estimates	
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Cover Pages: Ensure every doc has cover page Respect cover page suppression for				Compil. & Pkg Presets Routing Scenario Card States	
Include markups Add Comments Page to Document(s Regenerate ENTIRE Compilation due					
Compilation Sub-Packages					~

If changes are made to the presets on the project, the option to apply the changes to the system-level preset is available (ensuring that the new preset values are set as defaults on the future projects). The option to create a new preset is also available.



Once the compilation/package has been created, any changes/adjustment made to the presets will not be reflected. For pre-existing compilations/packages, adjustments must be made directly in the compilation editor. If a new compilation/package is created <u>after</u> changing/adjusting the presets, the presets will be reflected.