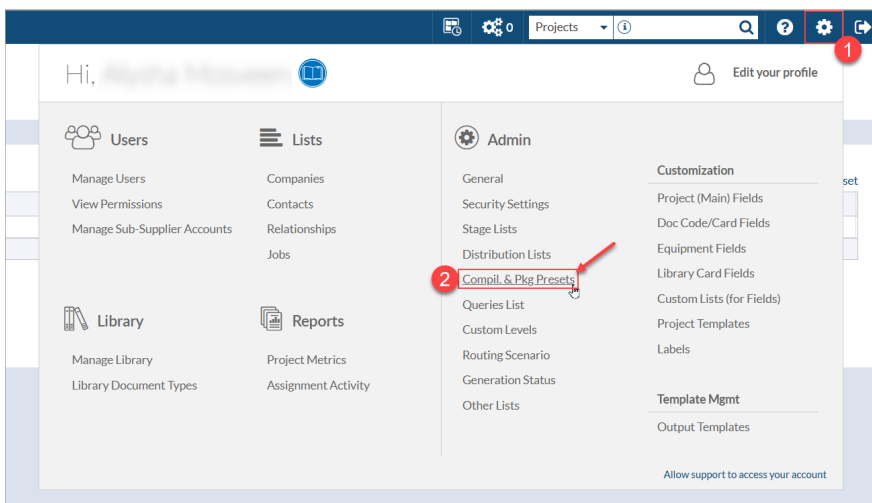


Compilation Structure & Styling Presets

10/02/2025 4:36 pm MDT

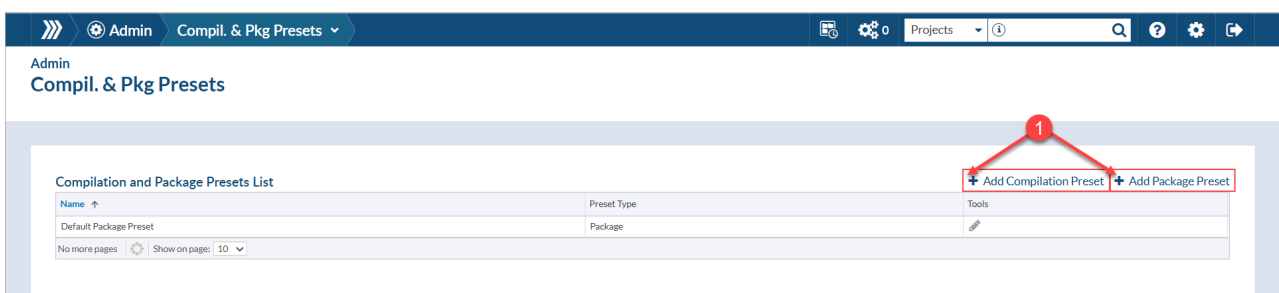
DocBoss uses presets to define various setting defaults for NEW compilations and packages created on a given project. Presets are defined on the project template, and once the project is created, the defaults are reflected.

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**.



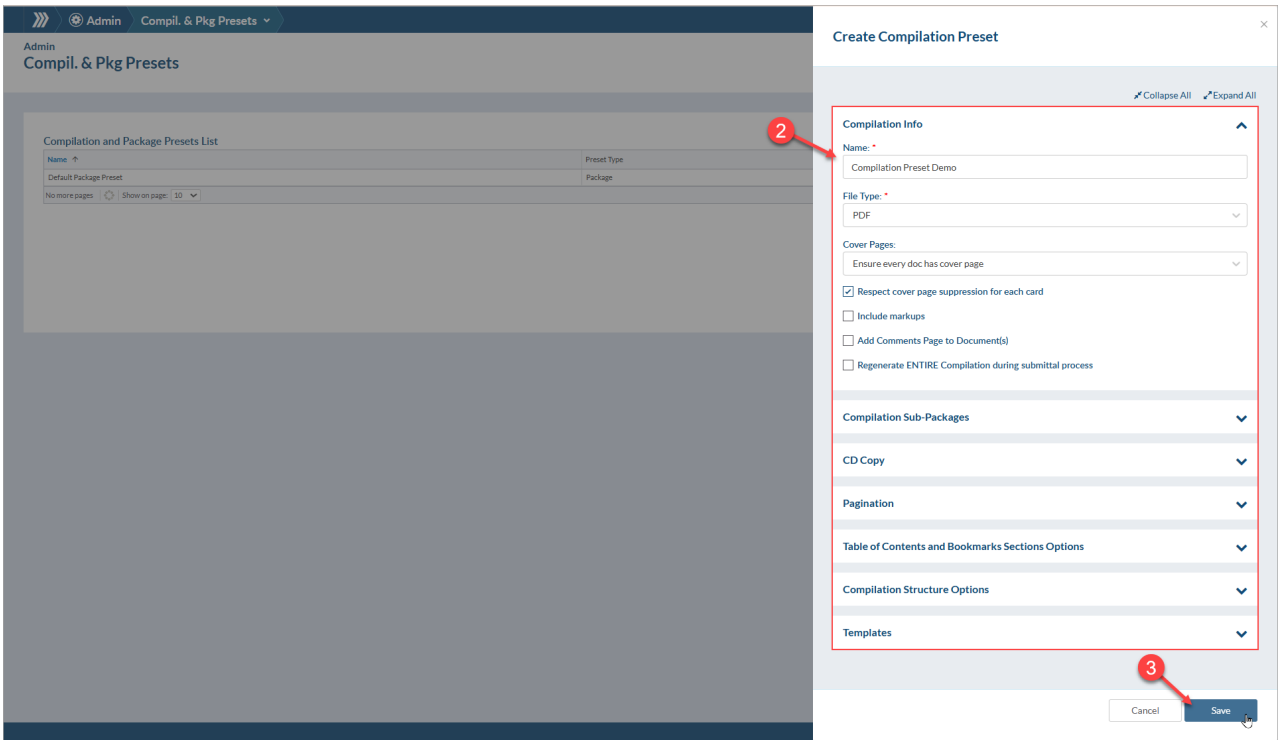
Create (and Apply) Presets

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

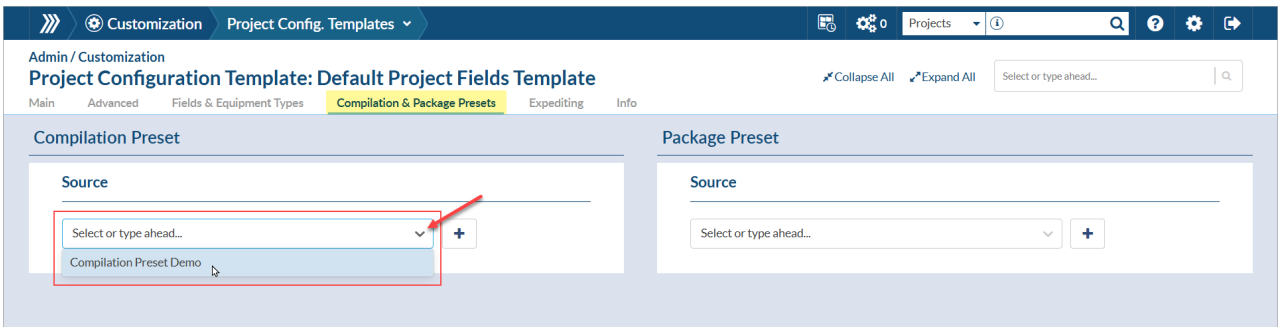


2. Name your preset, and set the default values according to requirements.

3. Once settings reflect requirements, save the preset.



4. Navigate to **System Menu > Admin > Customization > Project Config. Templates**. Open a project template and from the "Compilation & Package Presets" tab, select the desired preset for both compilations and packages.



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 the "Compilation & Package Presets" tab of the **Project Configuration** page (Project Menu > Set Up > Project Configuration).

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.

Pump Project (1234) Project Configuration

Set Up
Project Configuration

Main Advanced Fields & Equipment Types **Compilation & Package Presets** Expediting Info

Compilation Preset Package Preset

Original Source for Project Settings
Compilation Preset Demo

Original Source for Project Settings
Default Package Preset

Switch preset source Save as new preset Update original source

Compilation Info
Compilation Sub-Packages
CD Copy
Table of Contents and Bookmarks Sections Options
Pagination
Compilation Structure Options
Templates

Save Compilation Preset Save Package Preset



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 after changing/adjusting the presets, the presets **will** be reflected.