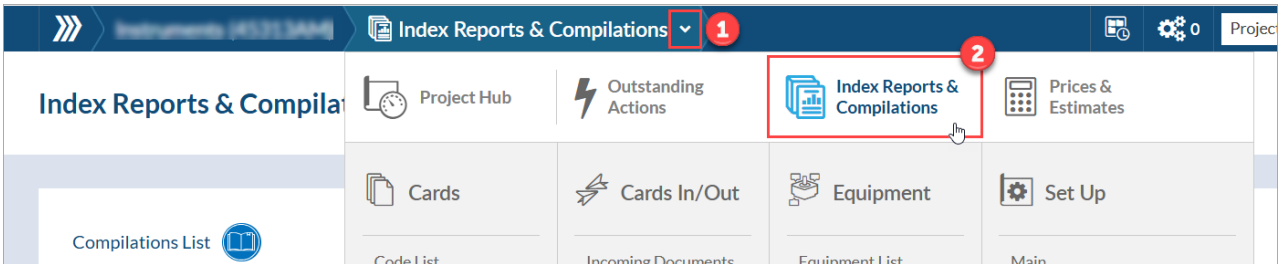


Create a Compilation

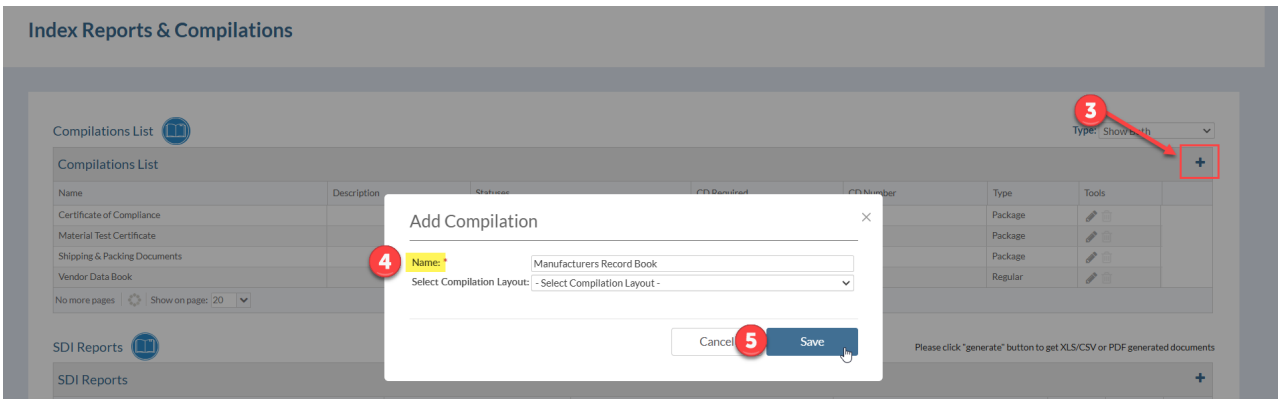
03/17/2025 3:16 pm MDT

Compilations are a collection of documents combined into a single PDF output. Generally referred to as databooks, manufacturing record books, dossiers, etc., they generally require bookmarks, hyperlinks, tables of contents, sections and more.

To create a compilation, navigate to **Project Menu > Index Reports & Compilations**.



In the compilations grid, click the "+" icon (top right), give the compilation a name, and click save.

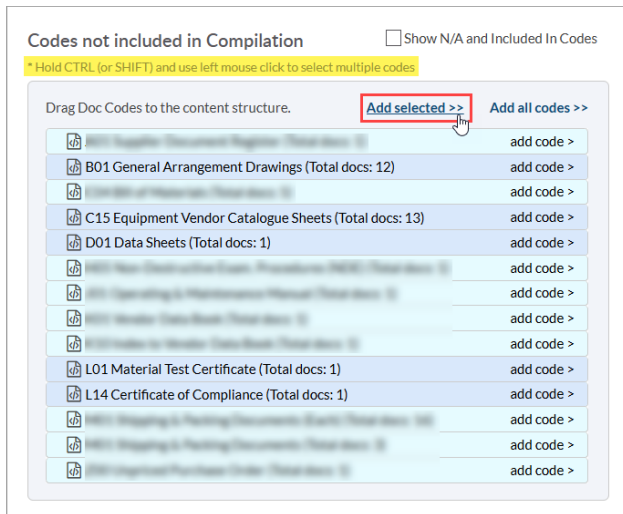


Quick & Easy

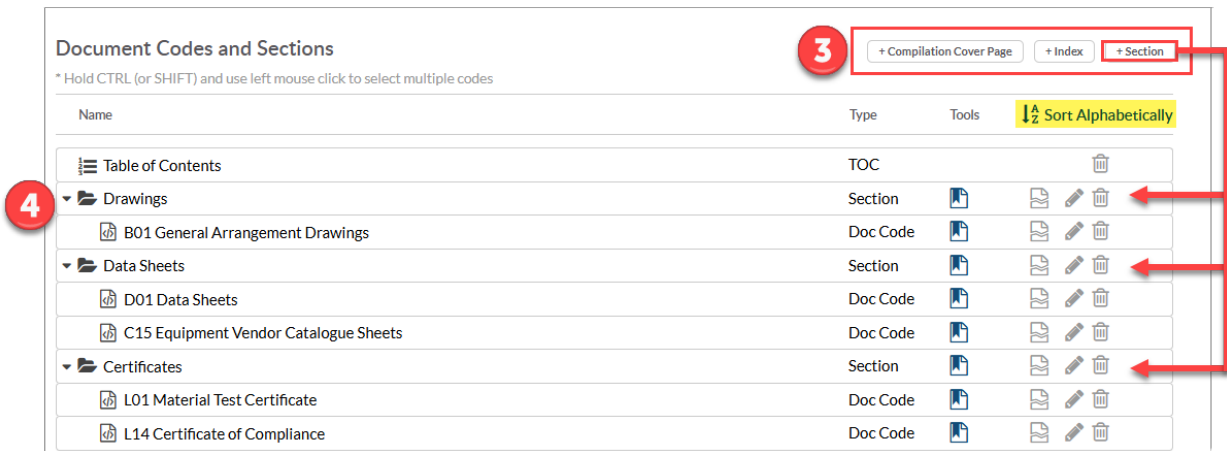
- **Step 1** - Name your compilation (as mentioned above).

The screenshot shows the 'Compilation Info' form. A red box with the number '1' is next to the 'Name:' field. The 'Name:' field contains the text 'Vendor Data Book'. Below it are fields for 'Description:', 'File Type:' (set to 'PDF'), and 'Cover Pages:' (set to 'Ensure every doc has cover page'). There is a checkbox labeled 'Respect cover page suppression for each card' which is checked. At the bottom, there are three unchecked checkboxes: 'Include Markups', 'Add Comment Page to Document(s)', and 'Regenerate ENTIRE Compilation during submittal process'.

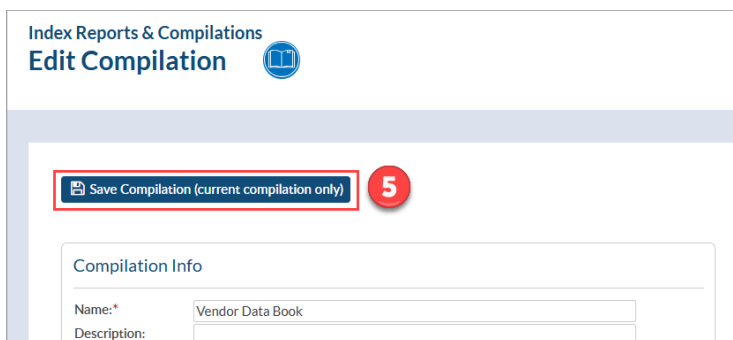
- **Step 2** - Scroll to bottom of page. Choose the Doc Codes to be included in the compilation, holding down the CTRL or SHIFT key to multi-select. Selected Doc Codes will appear in a darker shade of blue. Once all desired codes have been added, click "Add selected >>".



- **Step 3** - Add a cover page, index, and/or sections, if desired (top right of "Document Codes and Sections" grid).
- **Step 4** - Drag and drop the codes into applicable sections, and sequence accordingly. If desired, you can also sort the codes (and corresponding sections) alphabetically.



- **Step 5** - Make any additional formatting changes, and once happy with the layout, click save.



- **Step 6** - Click "Generate Compilation" and "Download Compilation" once generation is complete.

The screenshot displays a settings panel for compilations. On the left, there is a vertical sidebar with several dropdown menus. The main panel contains the following elements:

- Four checkboxes with labels: "Disable title page for Sub-Package", "Disable title page for Doc Code", "Allow Submittal Anytime" (with a question mark icon), and "Allow TOC Submittal Anytime" (with a question mark icon). The last checkbox is checked.
- A yellow button labeled "Download Compilation" with a download icon.
- A dark blue button labeled "Generate Compilation" with a gear icon and a red circle containing the number "6" next to it.
- A light blue button labeled "Download Table of Contents" with a download icon.
- A dark blue button labeled "Generate Table of Contents" with a gear icon.
- A light blue button labeled "Download Compilation Cover Page" with a download icon.



If any of the Compilation templates contain information related to the Card (e.g., Document number, Revision, Title, etc.), the variables will only populate if the Compilation/TOC has been attached to a Doc Code.

See this article for more information.

Note: The compilation cover page preview cannot be linked to a doc code, so it will never show data related to the compilation card when generated on its own.

Additional settings

Compilations in DocBoss are designed to be highly customizable to meet the needs of your customer. Check out the resources below to learn more about the available options.

- [Create Compilations in DocBoss \(video\)](#)
- [Compilation Details and Structure Options \(article\)](#)
- [Table of Contents \(article\)](#)
- [Attach Compilations/TOC to a Doc Code \(article\)](#)
- [Templates Used on Compilations \(and Layout Impacts\) \(article\)](#)
- [Sorting Options in Compilations \(article\)](#)