Create a Compilation

04/17/2025 11:55 am 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.

Note: If you are looking for information about packages (and package-type compilations), see this article: Create Package of Cards.

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

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Index Reports & Compila	Project Hub	Outstanding Actions	Index Reports & Compilations	Prices & Estimates	
	Cards	🖨 Cards In/Out	🖉 Equipment	Set Up	
Compilations List	CodeList	Incoming Documents	FauinmentList	Main	

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

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Compilations List 🔟						Type: Show b.	h v
Compilations List							+
Name	Description	Statucoe	CD Permired	CD Number	Туре	Tools	
Certificate of Compliance		Add Compilation		×	Package	# 🗊	
Material Test Certificate		Add Compliation		_	Package	# 🗇	
Shipping & Packing Documents		Name: * Manufacturers Record Book			Package	er 🗇	
Vendor Data Book	•	Select Compilation Layout: - Select Compilation Layout -		~	Regular	Ø 🗇	
No more pages 🔹 Show on page: 20 🗸							

Quick & Easy

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

Name:*	Vendor Data Book	
Description:		
File Type:	PDF	~
Cover Pages:	Ensure every doc has cover page	~
	Respect cover page sup	pression for each card
Include Marku	ips	
Add Common	t Page to Document(s)	

• 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 >>".

odes not included in Compilation		d Included In Cod
old CTRL (or SHIFT) and use left mouse click to selec	t multiple codes	
Drag Doc Codes to the content structure.	Add selected >>	Add all codes >
a)		add code >
🚯 B01 General Arrangement Drawings (Tot	al docs: 12)	add code >
மி		add code >
🚯 C15 Equipment Vendor Catalogue Sheets	s (Total docs: 13)	add code >
🚯 D01 Data Sheets (Total docs: 1)		add code >
di la constante de	NEE Travelous 1	add code >
ு	and these life	add code >
d)		add code >
ு	en 10	add code >
🕼 L01 Material Test Certificate (Total docs:	1)	add code >
🚯 L14 Certificate of Compliance (Total docs	:: 1)	add code >
ு	to Tenar days 140	add code >
ு	a des la	add code >
a	- 10	add code >

- 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.

Document Codes and Sections	5 + Con	pilation Cover P	age + Index + Section
Hold CTRL (or SHIFT) and use left mouse click to select multiple codes	<u> </u>		
Name	Туре	Tools	$\downarrow^{\mathbf{A}}_{\mathbf{Z}}$ Sort Alphabetically
Table of Contents	TOC		Ĩ
- 🖕 Drawings	Section		🗟 🖉 û 🖛
B01 General Arrangement Drawings	Doc Cod	e 💽	🗟 🖋 🛍
🖈 🗁 Data Sheets	Section		🗟 🖉 û 🔶
💩 D01 Data Sheets	Doc Cod	e 📭	🗟 🖋 🛍
C15 Equipment Vendor Catalogue Sheets	Doc Cod	e 🖪	🗟 💉 🛍
- 🔁 Certificates	Section		🗟 🖉 🛍 🔶
🕢 L01 Material Test Certificate	Doc Cod	e 🖪	🖹 💉 🛍
L14 Certificate of Compliance	Doc Cod	e 🃭	R 🖉 🛍

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

dex Reports & C dit Compil		
Save Compila	ion (current compilation only)	
Compilation	Info	
Name:*		

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

	Disable title page for Sub-Package Disable title page for Doc Code Allow Submittal Anytime ? Allow TOC Submittal Anytime ?		
	Bownload Compilation	🔅 Generate Compilation	6
	Download Table of Contents	Generate Table of Contents	
> > > >	Download Compilation Cover Page		

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 <u>cannot</u> 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)
- Overview of Compilation Options (article)
- Overview of Table of Contents Options (article)
- Attach Compilations/TOC to a Doc Code (article)
- Compilation Templates (and Layout Impacts) (article)
- Sorting Cards in Compilation (article)