

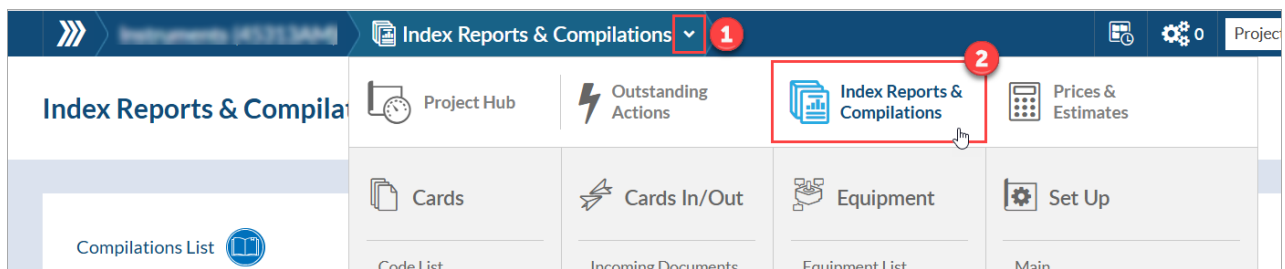
Create a Compilation

04/17/2025 11:55 am MDT

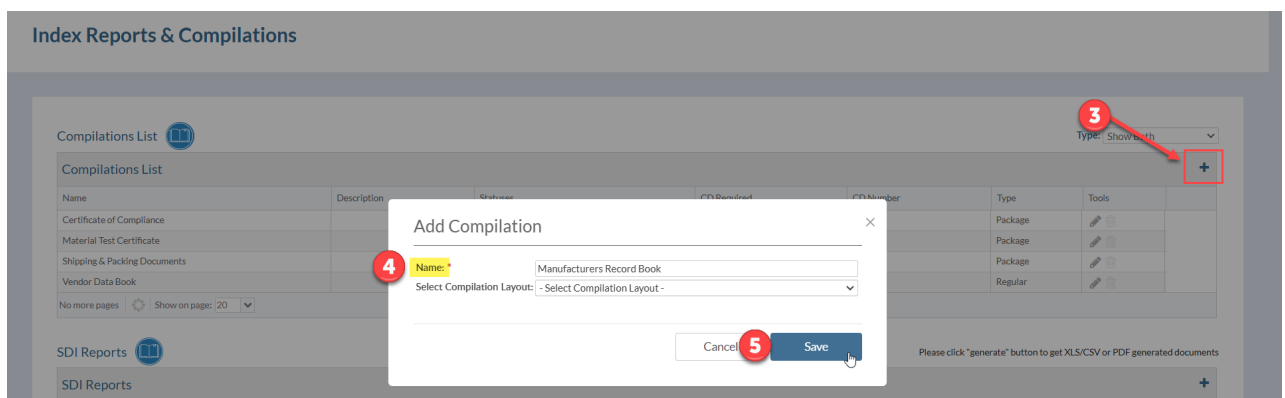
Compilations are a collection of documents combined into a single PDF output. Generally referred to as databooks, manufacturing record books, dossiers, etc., they generally require bookmarks, hyperlinks, tables of contents, sections and more.

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**.



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).

1

Compilation Info

Name:

Vendor Data Book

Description:

File Type:

PDF

Cover Pages:

Ensure every doc has cover page

☒ Respect cover page suppression for each card

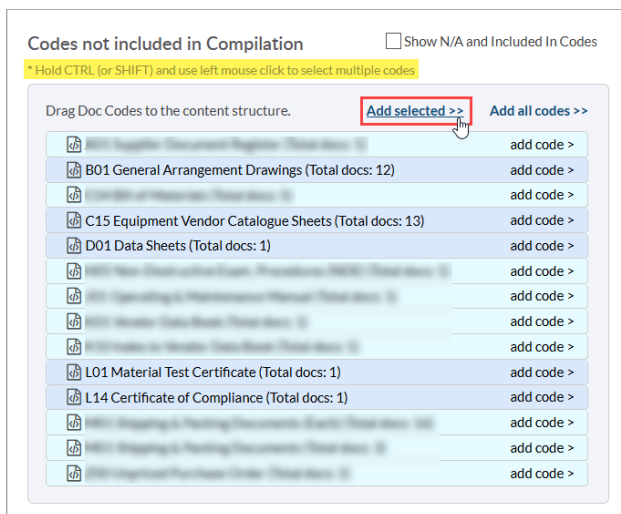
☐ Include Markups

☐ Add Comment Page to Document(s)

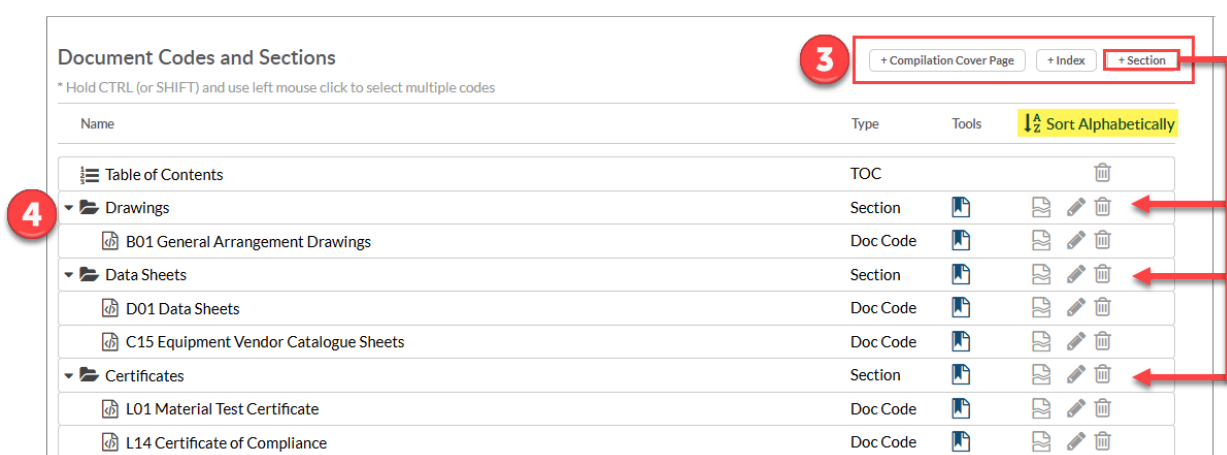
☐ Regenerate ENTIRE Compilation during submittal process

- **Step 2** - Scroll to bottom of page. Choose the Doc Codes to be included in the compilation, holding down the

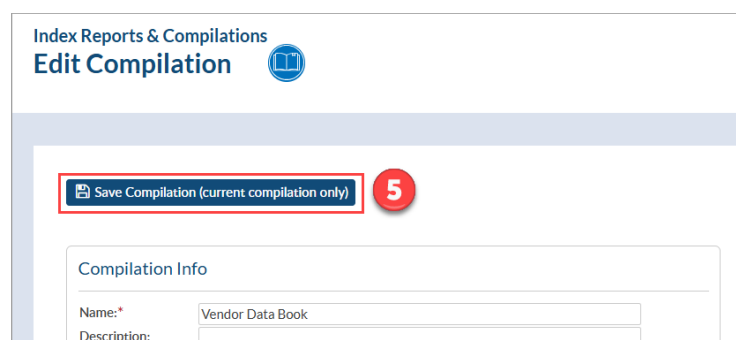
CTRL or SHIFT key to multi-select. Selected Doc Codes will appear in a darker shade of blue. Once all desired codes have been added, click "Add selected >>".



- **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 shows a web interface for managing compilations. On the left is a sidebar with several empty input fields and dropdown menus. The main area contains a settings section with four checkboxes: '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' (checked, with a question mark icon). Below the settings are three buttons: 'Download Compilation' (yellow), 'Download Table of Contents' (light blue), and 'Download Compilation Cover Page' (light blue). To the right of these are two dark blue buttons: 'Generate Compilation' and 'Generate Table of Contents', both featuring a gear icon. A red circle with the number '6' is positioned to the right of the 'Generate Compilation' button.



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)
- [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)