

Compilation Templates (and Layout Impacts)

05/21/2025 11:42 am MDT

There are five different templates used in compilations. Users can upload / update templates by navigating to **System Menu > Admin > Template Mgmt > Output Templates**.

Templates

Compilation Cover Page:	Default Compilation Cover Page (system) ▼
Table of Contents:*	Compilation Table of Contents Template (system) ▼
Section Title Page:*	Compilation Section Title Page (system) ▼
Doc Code Title Page:*	Compilation Doc Code Title Page (system) ▼
Sub-Package Title Page:	Compilation Sub-Package Title Page (system) ▼

Compilation Cover Page

The compilation cover page can be downloaded as a separate document and/or be included as the first page of the compilation structure. The system-generated compilation cover page includes the compilation name, project name, PO number, etc., and custom compilation cover pages can be created if desired.

Download Compilation

Generate Compilation

Download Table of Contents

Generate Table of Contents

Download **Compilation Cover Page**
























Document Codes and Sections

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

+ Compilation Cover Page

+ Index

+ Section

Name	Type	Tools	Sort Alphabetically
Compilation Cover Page	Cover Page	 	
Table of Contents	TOC		
▼ Certificates	Section	  	
L25 Hydrostatic / Pneumatic Test Certificates	Doc Code	  	
L99 Letter / Certificate of Material Compliance	Doc Code	  	
▼ Data Sheets	Section	  	
K11 Registration of Fittings, Valves and Vessels(CRN)	Doc Code	  	
L01 Material Test Certificate (Each)	Doc Code	  	
L14 Certificate of Compliance (Each)	Doc Code	  	



For customers who are still working with hard copy's, the compilation cover page is typically inserted into the clear plastic cover on the front flap of a three hole binder.

Table of Contents

The table of contents (TOC) is automatically included in the compilation. There are a variety of settings under the "Table of Contents and Bookmarks sections options" section that adjust the layout of the table of contents.











For detailed information on each of these options, see the following articles:

1. Sort Cards in Compilation
2. Table of Contents - Examples

Section Title Page

Section title pages are included if/when a section has been added to the compilation structure. The system-generated section title page includes the section name and a full list of the sub-hierarchy (sub sections and doc codes contained in the section), and custom section title pages can be created if desired.











If section title pages do not need to be included, they can be disabled in the compilation structure by clicking on the icon next to the section name.

Compilation Cover Page	Cover Page		
Table of Contents	TOC		
1 Engineering	Section		
1.1 AA Document Schedule (Order)	Doc Code		
1.2 DS Data Sheets (Tag (TE))	Doc Code		

Doc Code Title Page

Doc codes are treated as sections for the purposes of the table of contents. The system-generated doc code title page includes the doc code name and a full list of the cards contained, and custom doc code title pages can be created if desired.

If doc code title pages do not need to be included, they can be disabled in the compilation structure by clicking on the icon next to the doc code name.

Compilation Cover Page	Cover Page		
Table of Contents	TOC		
1 Engineering	Section		
1.1 AA Document Schedule (Order)	Doc Code		
1.2 DS Data Sheet (Tag (TE))	Doc Code		

To disable title pages for all doc codes, set the Doc Code Title Page option to "No Template" OR check the "Disable title page for Doc Code" box under the "Compilation Structure Options" section.

Instruments (45313AM)Index Reports & Compilations

Select Compilation Layout: - Select Compilation Layo Save As

Compilation Sub-Packages

Allow Sub-Packages per: Compilation

Create Sub-Packages by: Do not create Sub-Packages

CD Copy

CD Required

CD Copies Number: 0

Pagination

Page Number Position: No Numbering

Page Number Pattern: <PageNumber>

Templates

Compilation Cover Page: Default Compilation Cover Page (system)

Table of Contents: Compilation Table of Contents Template (system)

Section Title Page: Compilation Section Title Page (system)

Doc Code Title Page: Compilation Doc Code Title Page (system)

Sub-Package Title Page: No Template

Show page numbers on the TOC

TOC/Bookmark pattern for doc code: <DocCode> - <DocCodeName>

Append Included In Codes to Primary Code (if applicable) using suffix: (Includes <IncludesInCodeList>

When Included In Codes are added to the compilation layout, add suffix to TOC/Code: (Included In <DocCode>

When Not Applicable Codes are added to the compilation layout, add suffix to TOC/Code: (N/A)

Compilation Structure Options

Sort documents inside section: By pattern value Choose fields for sorting

On generation, do not include document files. Create structure only

Only display relevant equipment in lists

Show Not Applicable on Doc Code Title Page if no cards for a code

Disable title page for Sub-Package

Disable title page for Doc Code

Allow Submittal Anytime

Allow TOC Submittal Anytime

Download Compilation

Generate Compilation

Download Table of Contents

Generate Table of Contents

Download Compilation Cover Page

Sub-Package Title Pages

Sub-package title pages are included if/when the compilation has been set to be organized by sub-package. The system-generated sub-package title page includes the sub-package name and a full list of the sub-hierarchy (sub sections and doc codes contained in the section), and custom sub-package title pages can be created if desired.
