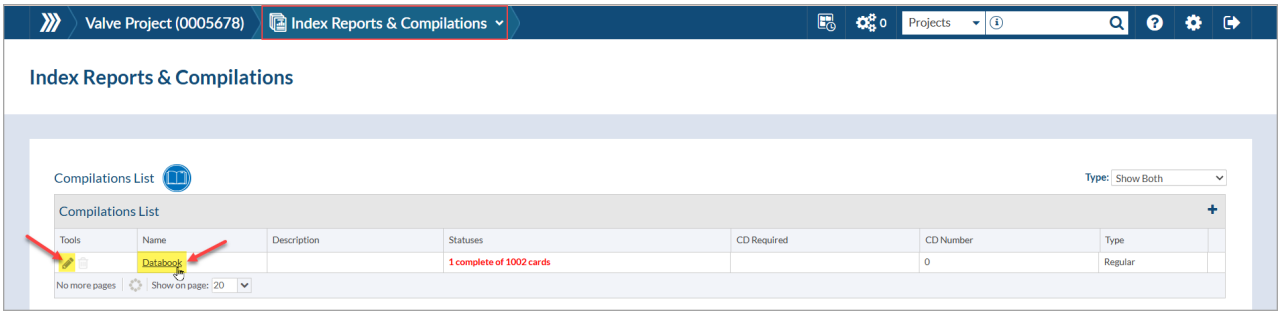
Overview of Table of Contents Options

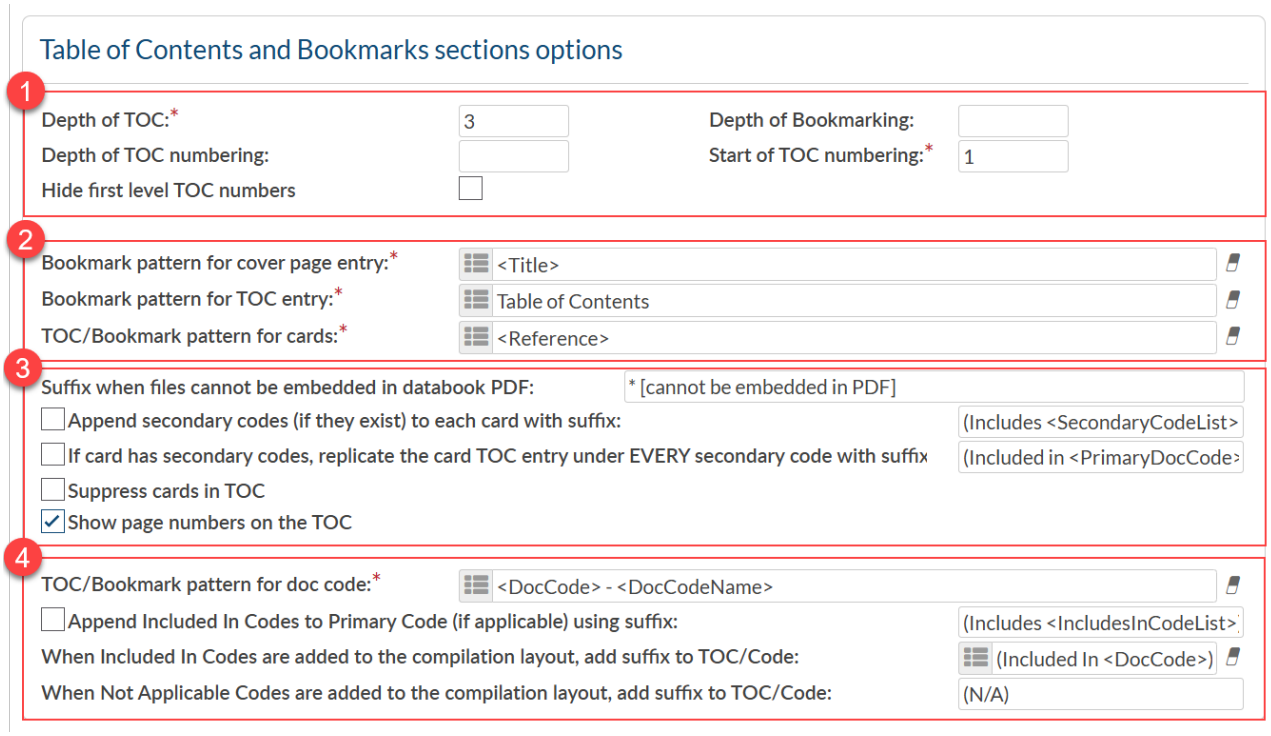
07/06/2026 12:42 pm MDT

After creating a compilation (see article: Create a Compilation), the organization options can be updated to reflect the requirements of your customer.

To edit a compilation, navigate to **Project Menu > Index Reports & Compilations.** Open the compilation editor by clicking on the name, or on the pencil icon in the "Tools" column, and scroll to the "Table of Contents and Bookmarks sections options" section.



There are four categories of options available for adjustment:



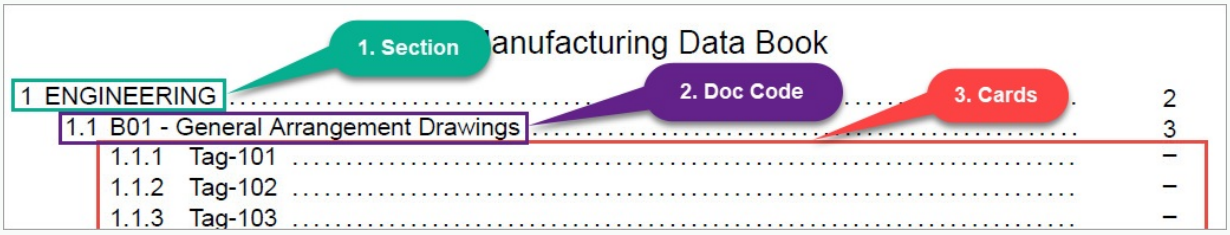
1. Depth & numbering



a. Depth of TOC

Option to increase/decrease the depth of information to be displayed on the TOC. Generally speaking, the levels of depth are: (1) section (*if applicable*), (2) doc code, and (3) card.

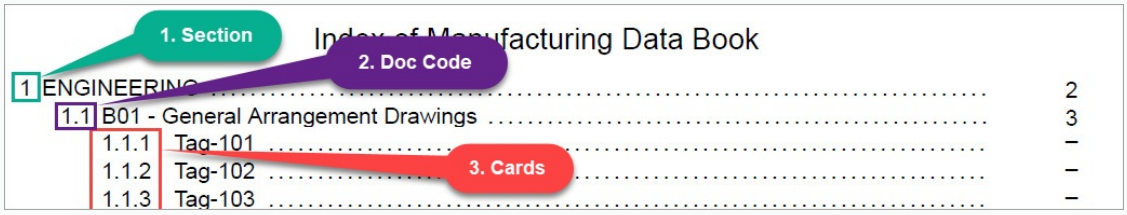
Example:
If the TOC depth is "3," three levels of detail will be displayed: (1) the section, (2) the doc code, and (3) the card(s).



b. Depth of TOC numbering

Option to increase/decrease the depth of TOC auto-numbering patterns. If left blank, auto-numbering will only apply to the first level, and if no numbers are required, "0" can be entered.

Example:
If the TOC numbering depth is set to “3,” auto-numbering will occur on 3 levels (1, 1.1, 1.1.1).



c. Hide first level of TOC numbers

Option to show or hide the first level of TOC auto-numbering. For example, if the first level is a section and sections do not require numbering, this box can be checked.

d. Depth of Bookmarking

Option to set the depth of bookmarking on PDF output. If all levels of the TOC should be bookmarked/clickable, set this number to match the "Depth of TOC" value.

e. Start of TOC numbering

Option to set the starting number for TOC auto-numbering. By default, this value is set to "1."

For examples that demonstrate the impact of TOC depth/numbering settings, see this article: Table of Contents - Examples.

2. TOC/Bookmark patterns



a. Bookmark pattern for cover page entry

Option to select variable(s) and/or type text to show on the cover page bookmark.

b. Bookmark pattern for TOC entry

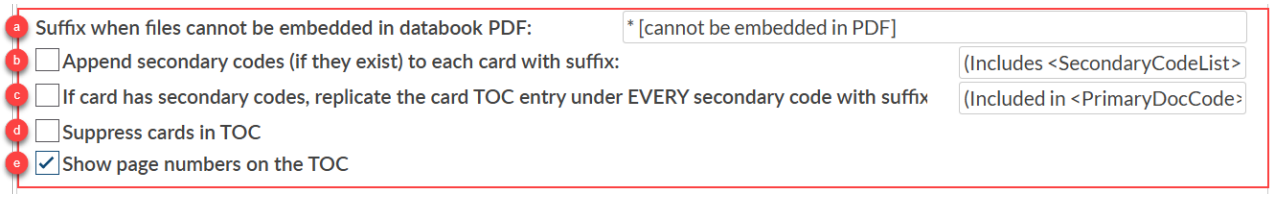
Option to select variable(s) and/or type text to show on the TOC bookmarks.

c. TOC/Bookmark pattern for cards

Option to select variable(s) and/or text to show on the TOC. The pattern established in this section impacts both the organization of the TOC, as well as the sorting of cards throughout the book.

IF statements and parameters can also be used as part of the TOC/Bookmark patterns. For more information, see this article: Using IF statements.

3. Formatting options



a. Suffix when files cannot be embedded in databook PDF

Option to set the text that will be displayed for any non-pdf files in the compilation

b. Append secondary codes (if they exist) to each card with suffix

Option to add secondary codes to the line on the TOC.

Example:
Option enabled, and suffix set to "(Includes <SecondaryCodeList>)".

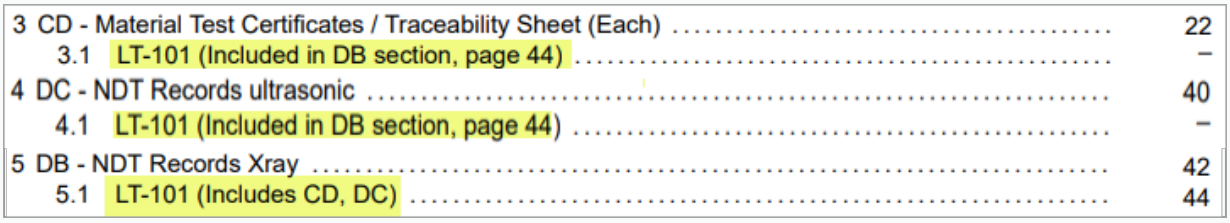


c. If card has secondary codes, replicate the card TOC entry under

EVERY secondary code with suffix

Option to list the card under the primary code, and EVERY secondary doc code (result is one card with multiple listings on the TOC).

Example:
Option enabled, and suffix set to "(Included in <PrimaryDocCode> section, page <PageNumber>)".



d. Suppress cards in TOC

Option to EXCLUDE individual documents from the TOC and still show all levels of hierarchy.

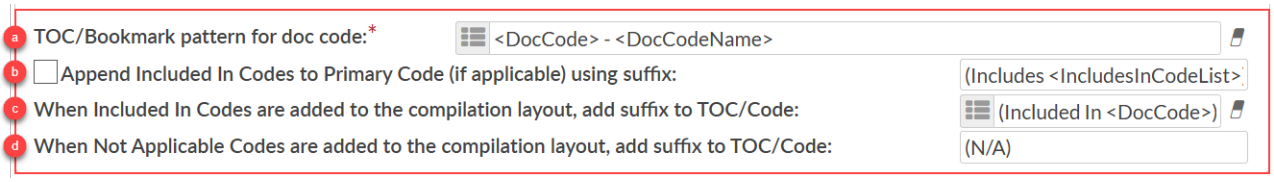
This option is useful when there are differing levels of hierarchy that cannot be limited via the TOC depth setting, and/or there is a large number of individual documents that do not need to be displayed on the TOC.

e. Show page numbers on the TOC

Option to display the page numbering irrespective of whether or not a card has a document.

Example:
Your customer requests a copy of the TOC at project initiation and requires that page numbers be included (even if some/all cards are NULL). By selecting this option, DocBoss will generate the expected page numbering using (1) the actual page count, or (2) the code list estimate (i.e., "Est. pgs") if card is NULL.

4. Additional TOC/Bookmark pattern options



a. TOC/Bookmark pattern for doc code

Option to select the pattern of variables that establishes the organization of the TOC (and sorts the cards to match).

For more information, see the following articles:
1. Sort Cards in Compilation.
2. Table of Contents - Examples

b. Append Included In Codes to Primary Code (if applicable) using suffix

Option to add a list of "Included In Codes" (as indicated on the doc code list) to cards in the primary code category, and set the suffix that appears.

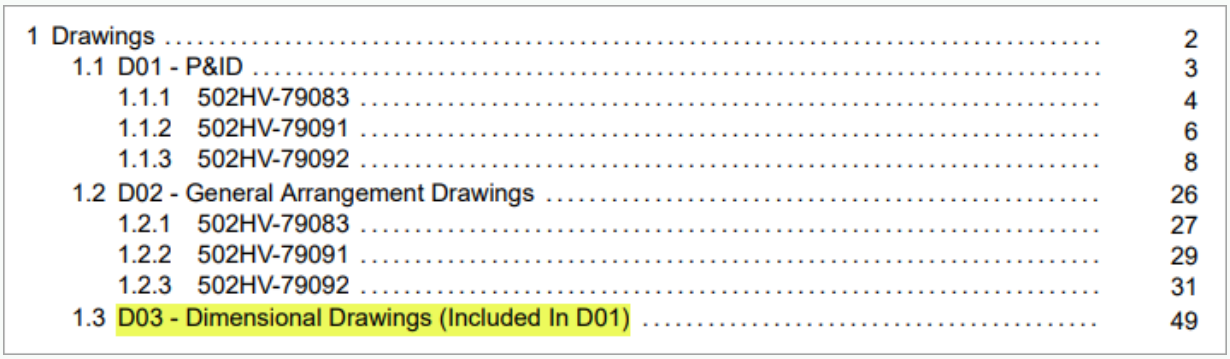
Example:
Option enabled, suffix set to "(Includes <IncludesInCodeList>)", and doc codes CD and DC marked as included in the DB doc code.



c. When Included In Codes are added to the compilation layout, add suffix to TOC/Code

Option to include the "Included In Codes" (as indicated on the doc code list) to the primary code category, and set the suffix that appears.

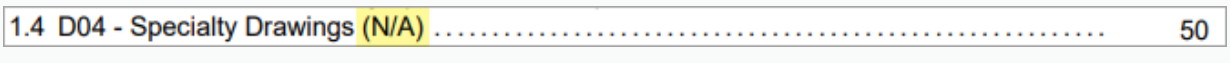
Example:
Option enabled, suffix set to "(Included In <DocCode>)", and doc code D03 marked as included in the DO1 doc code.



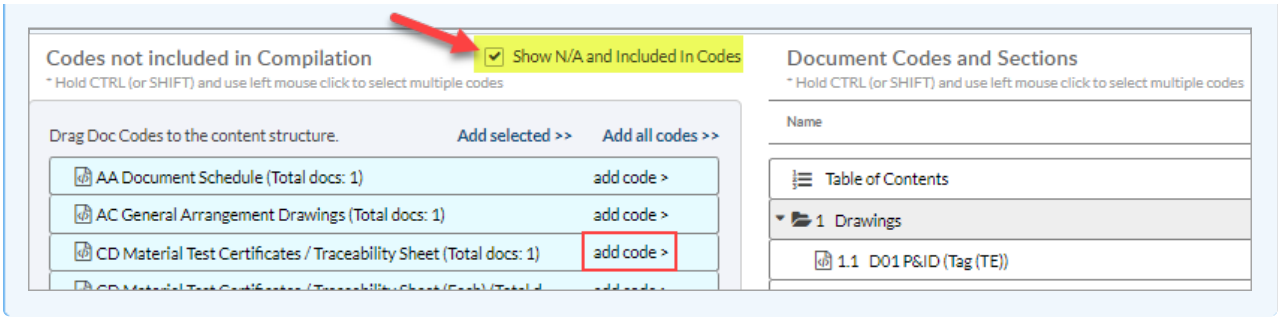
d. When Not Applicable Codes are added to the compilation layout, add suffix to TOC/Code:

Option to include codes set at level "N/A", and set the suffix that appears.

Example:
Option enabled, and suffix set to "(N/A)".



Note:
To see the "Included In Codes" and/or codes set to level "N/A" when establishing your compilation structure, you must enable the "Show N/A and Included In Codes" option and then add the code(s) to the structure.

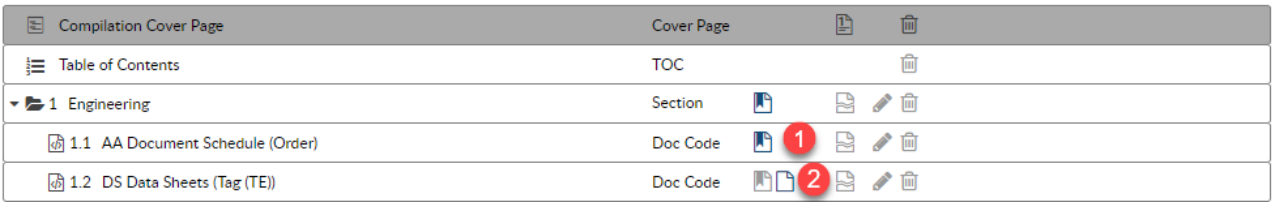


Additional TOC options

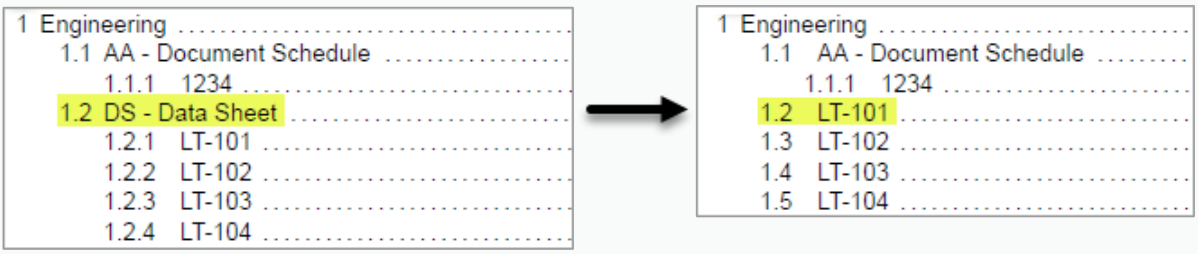
From the compilation structure builder, there are three additional options available impacting the TOC:

1. Hide a doc code from the TOC

To hide a specific doc code from the TOC, first select the icon to disable the title page, and subsequently select the icon to hide the doc code from the TOC/Bookmark list. The end result will have both icons greyed out ( ).

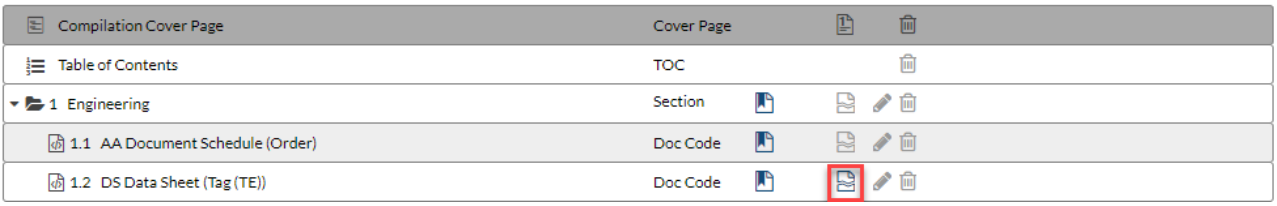


Example:
By hiding the DS (Data Sheets) doc code, the individual cards move up a level.



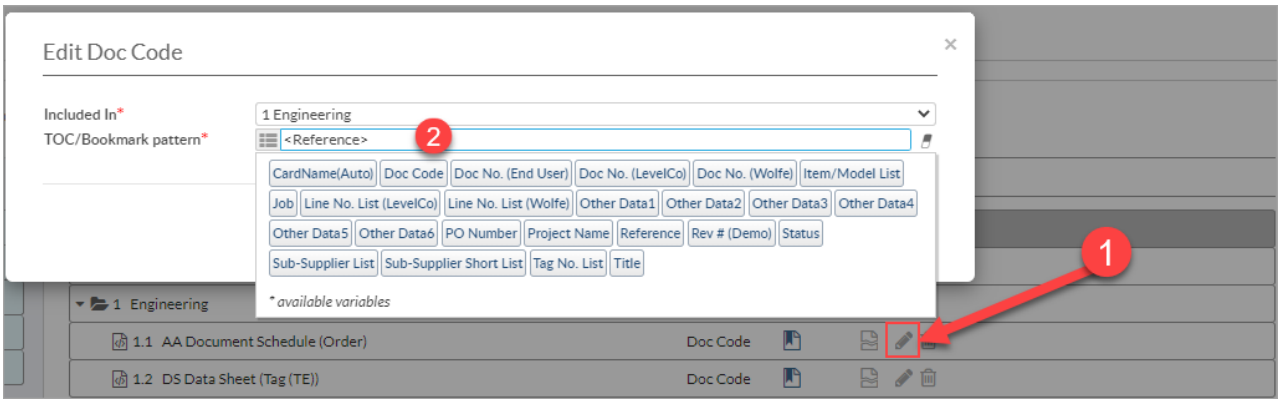
2. Start a section/doc code on a new page

To have a section or doc code start on a new page of the TOC, select the icon.



3. Change the naming convention for specific doc code

If a specific doc code requires a different naming convention (than what has been set in the "TOC/Bookmark patterns" section) , select the icon and modify the pattern as required.



TOC Templates

The TOC is structured using a LaTeX template, and minor adjustments can be made to it (seearticle: Adjust Default Table of Contents Styling).

If the customer provides a pre-established XLS template to use instead, follow the instructions in this article: Use Pre-Established Table of Contents Template.

If the customer has very specific requirements **but does not** provide a pre-established XLS template, reach out to the DocBoss team for support.