

Attach Compilations/TOC to a Doc Code

03/10/2025 4:48 pm MDT

Compilations/Table of Contents (TOC) are initially configured as stand-alone documents that are linked to ALL equipment units. In order to include these documents in a submittal and/or manage the level at which these documents are generated (e.g., per order, per major tag, etc.), these documents should be attached to a Doc Code in the Code List.

Follow the steps below to learn how to attach a Compilation/TOC to a Doc Code in DocBoss:

Attaching Compilations/TOC

Navigate to **Project Menu > Cards > Code List**

Compilation (E.g., Data Book)

- Step 1: Set the applicable Doc Code and change the "Type" to "Compilation"
- Step 2: When prompted*, create a new compilation. If you have already set up a compilation for this code, choose it from the grid.
- Step 3: Click "Attach"

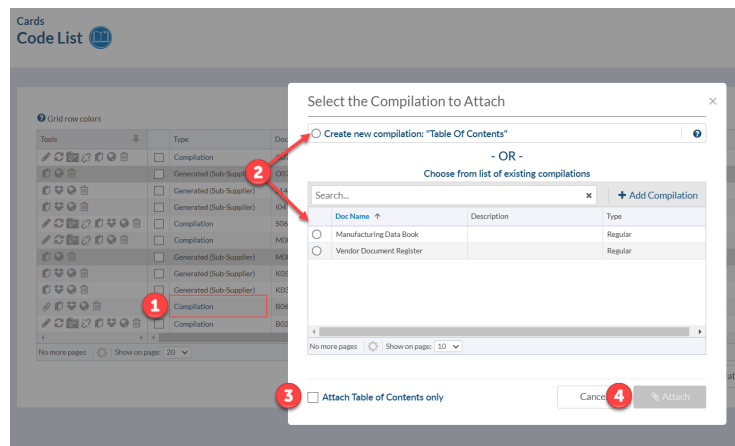


Table of Contents

- Step 1: Set the applicable Doc Code and change the "Type" to "Compilation"
- Step 2: When prompted*, choose the appropriate compilation from the grid (e.g., Data Book).
- Step 3: Check the box that reads "Attach Table of Contents only"
- Step 4: Click "Attach"

*If you are not prompted with a pop-up, click the  icon under Tools.



If you are looking to send the TOC to your customer, navigate to **Project Menu > Index Reports & Compilations** and choose the compilation. From the compilation settings, generate the TOC.

Note: There must be at least one Doc Code or Card in the compilation structure for it to generate.

Once generated, download the TOC and choose the TOC card by selecting the box from the grid in the pop-up. Once completed, the TOC card will appear in the list of Outgoing Submittals to your customer.

Unlinking Compilations/TOC





























Each compilation can only be linked to **one** compilation Doc Code (+ a TOC Doc Code, if applicable). If a compilation/TOC is already linked to a Doc Code, the compilation cannot be linked to another. In addition, if a compilation/TOC is linked to a Doc Code, you will not be able to delete the Doc Code until the compilation/TOC is un-linked.

To unlink a compilation/TOC, navigate to **Project Menu > Cards > Code List** and click on the unlink icon.

Navigation: **M-Project (158009)** > **Code List (Requirements)**

Cards
Code List (Requirements)

Grid Rows Colors

Code List (Requirements)				
Doc Code ↓	Doc Code Name	Tools	Type	Level
S06	Manufacturing Data Book	      	Compilation	Order
Q05	Surface Preparation And Painting Procedure	      	Generated (Sub-Supplier)	Order
O02	Pressure Test Certificates	      	Generated (Sub-Supplier)	Order
M13	Painting Certificates	      	Generated (Sub-Supplier)	Order

A red arrow points to the unlink icon in the Tools column of the first row (S06). A tooltip labeled "Unlink Compilation" is visible over the icon.

More options under Tools column:

[How to Re-generate Compilations](#)

[Submitting Incomplete Compilations](#)