

# Attach Compilation/TOC to a Doc Code

04/17/2025 8:20 am 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.

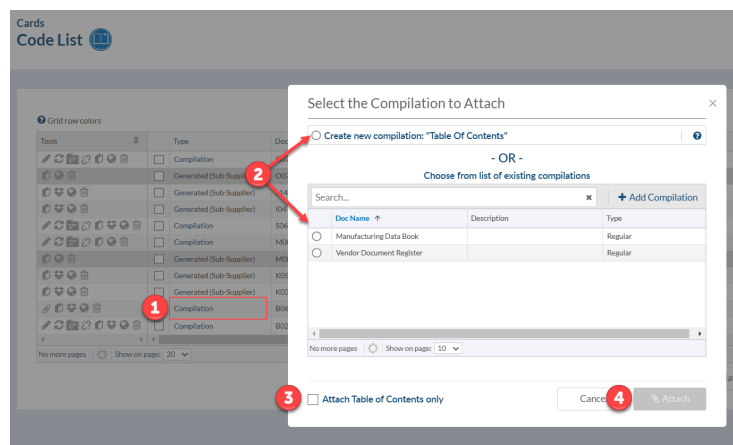
Follow the steps below to learn how to attach a Compilation/TOC to a Doc Code in DocBoss:

## Attach Compilation/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.

## Unlink Compilation/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.

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 |

Unlink Compilation

More options under Tools:

- 1. Regenerate Compilation
- 2. Submit Incomplete Compilation