

# Create Reusable Compilation Layout

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Once a compilation layout has been established, it can be saved for use on future projects.

## From Project (Compilation Editor)

From the compilation editor (**Project Menu > Index Reports & Compilations**), locate the "Compilation Layout" section and click "+ Save As". Give the layout a recognizable name (that will help identify it amongst other options when selecting the layout in the future).

The screenshot shows the 'Edit Compilation' window. At the top, the breadcrumb navigation is 'Valve Project (0005678) > Index Reports & Compilations > Edit Compilation'. The 'Compilation Info' section contains fields for Name (Databook), Description, File Type (PDF), and Cover Pages (Ensure every doc has cover page). The 'Table of Contents and Bookmarks sections options' section includes settings for Depth of TOC, Depth of TOC numbering, Hide first level TOC numbers, Bookmark pattern for cover page entry, Bookmark pattern for TOC entry, TOC/Bookmark pattern for cards, Suffix when files cannot be embedded in databook PDF, and TOC/Bookmark pattern for doc code. The 'Compilation Sub-Packages' section has a dropdown for 'Allow Sub-Packages per' (Section) and a checkbox for 'Enable All Fields'. The 'Compilation Layout' section is highlighted with a red box, showing a dropdown for 'Select Compilation Layout' and a '+ Save As' button with a red arrow pointing to it.

## From Company (Doc Code List)

From the Companies list (**System Menu > Lists > Companies**), open the company profile where the compilation layout should be saved. From the company profile, open the list of company doc codes.

The screenshot shows the 'Chemical Company Profile' window. The breadcrumb navigation is 'Lists / Companies / Chemical Company > Profile'. The 'Doc Codes' tab is highlighted with a red box. The 'Edit Company' form includes fields for Name (Chemical Company), Short Name (Chem C), Omega External Reference, Phone, Is Sub-Supplier (checkbox), and Default Cover Page Count (0). The 'Save' button is at the bottom right.

Open the doc code list where the compilation layout should be saved. A company may have multiple doc code lists, so be sure to select the correct list (as compilation layouts are linked directly to the selected doc code list).

Lists / Companies / Chemical Company  
Doc Codes

← Back to Companies List

A01-L20 A01-M01 A01-R04 A01-X01 + Add List

Doc Code List

Name: \*  
A01-L20

☐ Always load all field values from this list, NOT from mapped codes

Delete Save

Code List

Doc Code	Doc Code Name	Level	Type	Stage List	Delivery Days	Reference Date	Query	Tools	Omega Internal Code	Note	Disciplinary
A01	Supplier Document Index	Order	SDI Report	- Select Stage List -	10	AO: After Order	All Required		- Select Internal Code -		
A02	Production Schedule	Order	Generated (Sub-Supplier)	- Select Stage List -	10	AO: After Order	All Required		- Select Internal Code -		
A03	Progress Reports	Order	Generated (Sub-Supplier)	- Select Stage List -	10	AO: After Order	All Required		- Select Internal Code -		
A04	Databook	Order	Compilation	- Select Stage List -	10	AO: After Order	All Required		- Select Internal Code -		

Give the layout a recognizable name (that will help identify it amongst other options when selecting the layout in the future). Once saved, updates can be made to the layout as needed.

Lists / Companies / Chemical Company  
Doc Codes

← Back to Companies List

A01-L20 A01-M01 A01-R04 A01-X01 + Add List

Doc Code List

Compilation: Layout Demo

Compilation Layout Form

Name: \*  
Layout Demo

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

Table of Contents and Bookmarks sections options

Depth of TOC: \*  
3

Depth of TOC numbering: \*  
1

Depth of Bookmarking: \*  
1

Start TOC numbering: \*  
1

☐ Include cover page when determining total page count

Need some help?

Bookmark pattern for cover page entry: \*  
<Title>  
Table of Contents  
<Reference>

Bookmark pattern for TOC entry: \*  
<Title>  
Table of Contents  
<Reference>

TOC/Bookmarks pattern for cards: \*  
<Title>  
Table of Contents  
<Reference>

## Doc Codes and Sections

Once a layout is selected for use on project, the sections are automatically created but the doc codes still need to be selected. If doc codes were selected and saved as part of the layout, these doc codes will automatically be put into the applicable section.