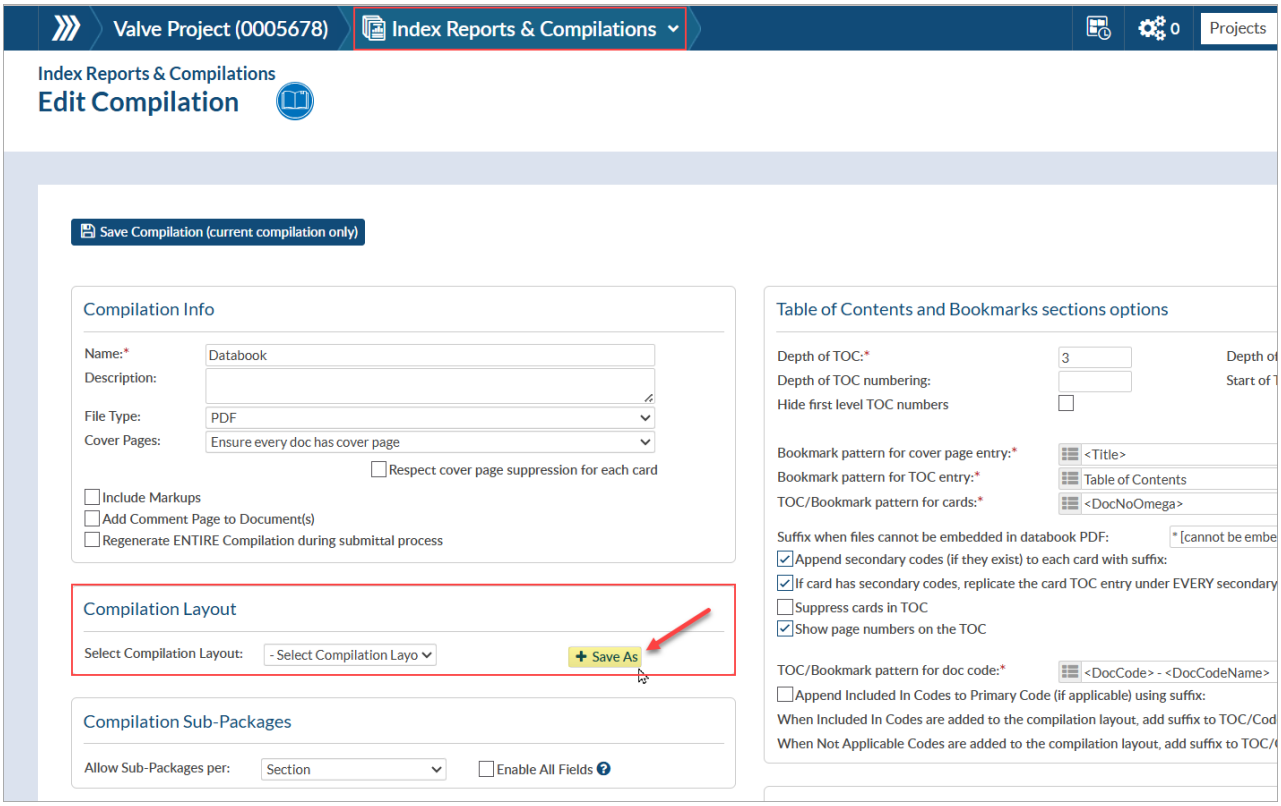
Create Reusable Compilation Layout

07/14/2026 4:13 pm MDT

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

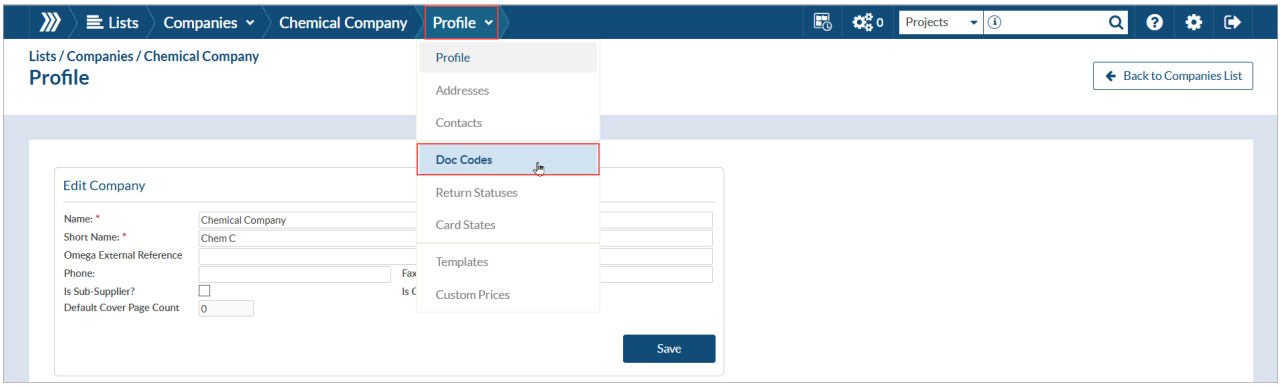
From Project (Compilation Editor)

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).

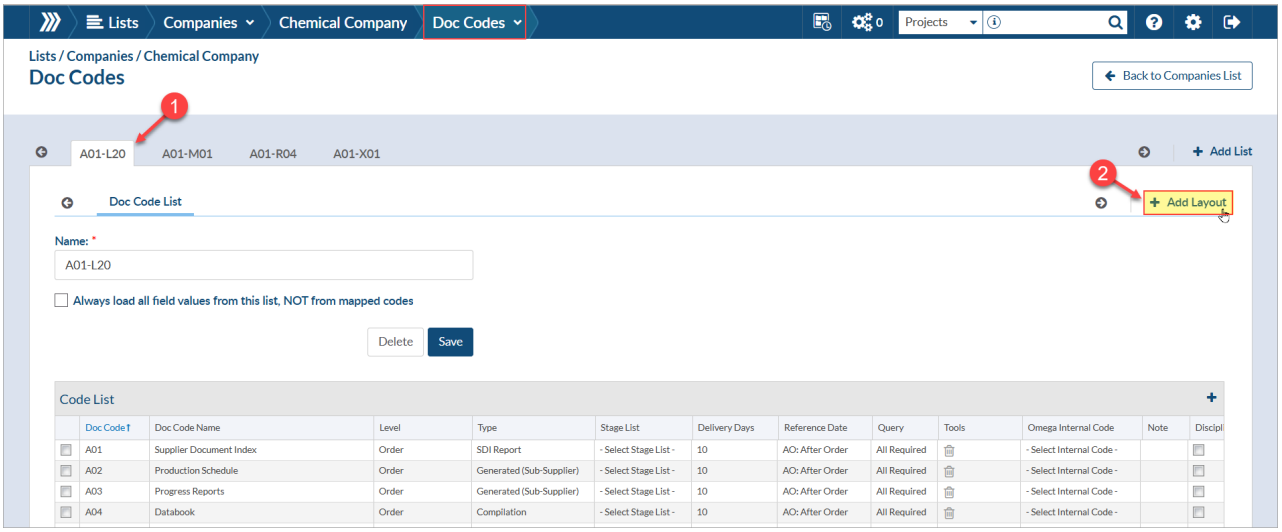


From Company (Doc Code List)

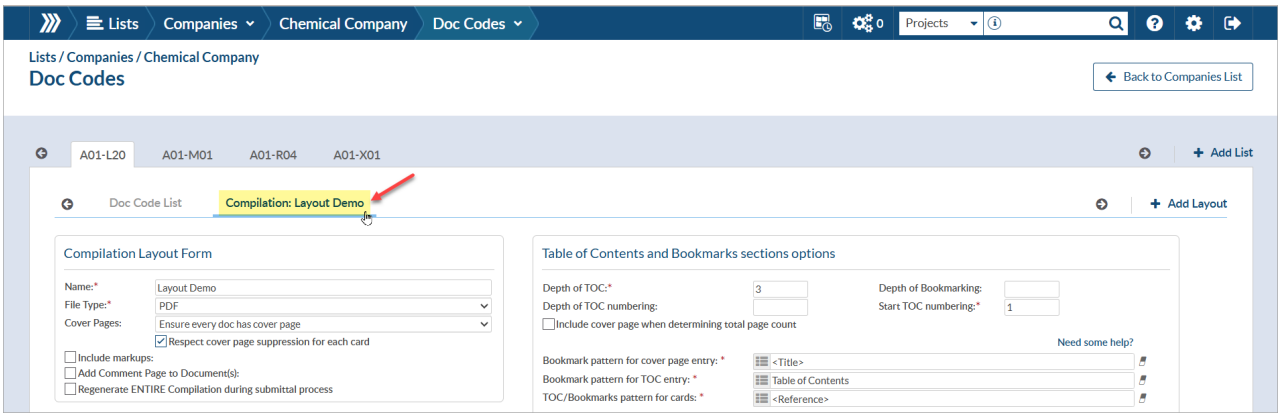
From the Companies list (**System Menu > Lists > Companies**), open the company profile where the compilation layout should be saved. From the company profile, open the list of company doc codes.

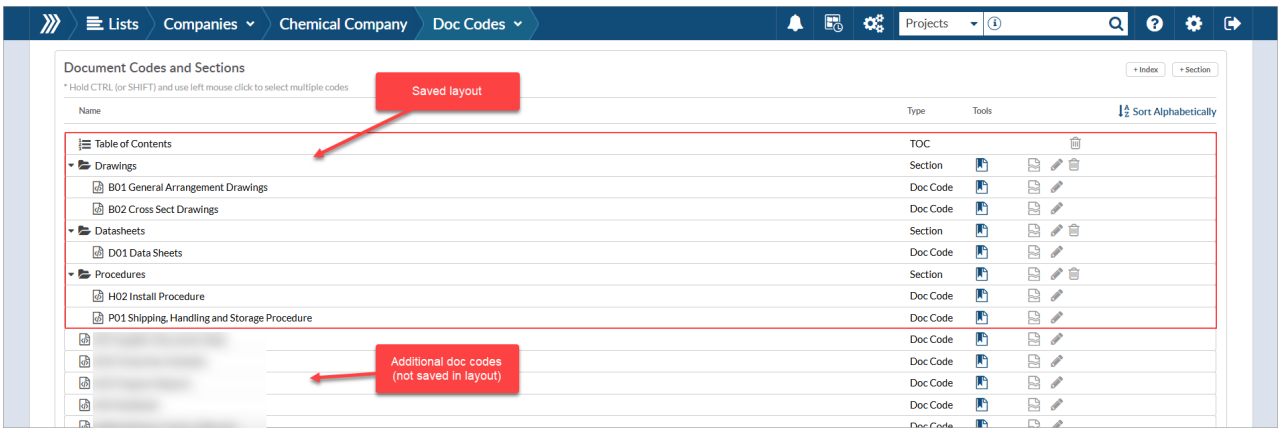


Open the doc code list where the compilation layout should be saved. A company may have multiple doc code lists, so be sure to select the correct list (as compilation layouts are linked directly to the selected doc code list).



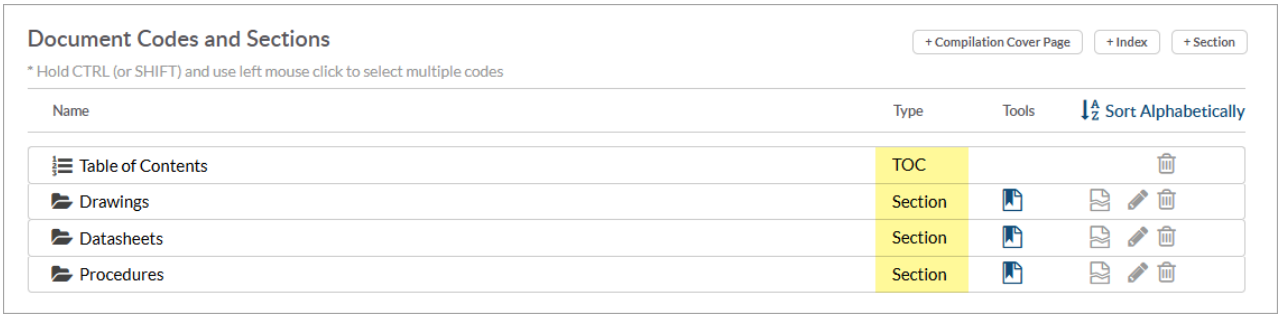
Give the layout a recognizable name (that will help identify it amongst other options when selecting the layout in the future). Once saved, updates can be made to the layout as needed.



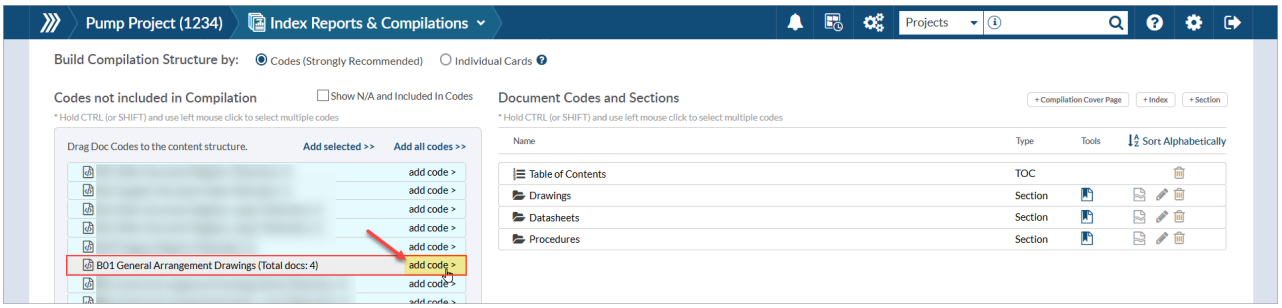


Doc Codes and Sections

Once a layout is selected for use on a project, the table of contents and sections from the saved layout will be **automatically added** to the compilation structure.



If doc codes were saved as part of the layout, they will be automatically organized into their applicable section**upon adding them to the structure**. Simply click "add code >" to add the doc codes to the structure, and the doc codes will be assigned their applicable section.



If an additional doc code is added to the structure (that was not included in the saved layout), it will be added to the end of the structure and can be re-organized as needed. If this additional code (or any other structure changes) should be saved for future use, you can save the layout (to overwrite the existing saved layout) or can save as a new layout (by clicking + Save As).

