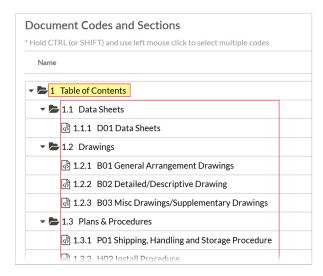
Sending Index Independently When Using Pre-Established TOC Template

10/30/2025 10:01 am MDT

When using a pre-established table of contents (TOC) template, it is uploaded as a**section title page** and the compilation structure is moved within one overarching section (see instructions: Use Pre-Established Table of Contents Template). In doing so, a section title page is added to the **beginning** of the compilation, and includes the entire compilation structure (providing the result the customer is looking for).

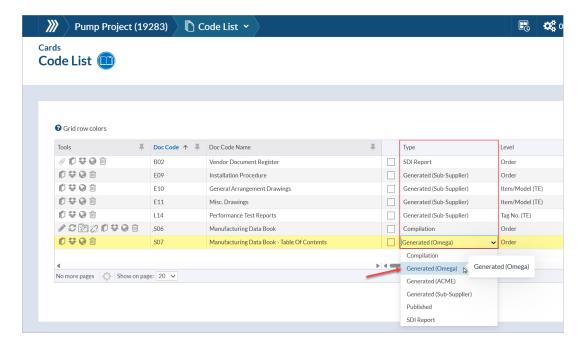


Section #	Title	Page No.
1	Data Sheets	2
	1.1 D01 - Data Sheets	3
2	Drawings	14
	2.1 B01 - General Arrangement Drawings	15
	2.2 B02 - Detailed/Descriptive Drawings	26
	2.3 B03 - Misc Drawings/Supplementary Drawings	37
3	Plans & Procedures	48
	3.1 P01 - Shipping, Handling and Storage Procedure	49
	3.2 H02 - Install Procedure	70
	3.3 Q02 - Quality Control Plan and Inspection & Test Plan	76

With the TOC being a section title page, it cannot be linked to a doc code (as it can with a LaTeX table of contents template (default) - see details). As such, if the customer has requested for the TOC to be submitted independently, follow the steps below.

Send TOC Independently

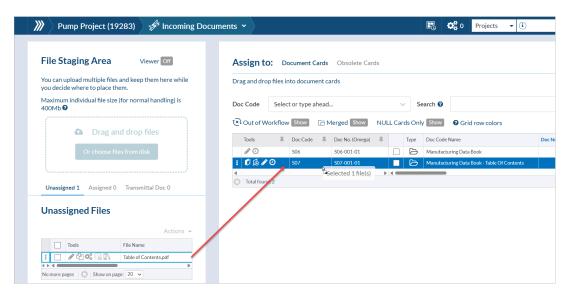
1. Navigate to the code list (**Project Menu > Card > Code List**), and set the index doc code type to "Generated [Internal]"



2. Navigate to the compilation editing screen (**Project Menu > Index Reports & Compilations**), and generate the <u>full</u> compilation. Once generated, download the compilation.



- 3. Once downloaded, open the book and remove all pages (other than TOC) using a PDF editor (e.g., Adobe).
- 4. Navigate to incoming documents (**Project Menu > Cards In/Out > Incoming Documents**) and upload the PDF as an incoming internal submittal. Then, assign the file to the index card.



TOC Document Number

If the pre-established TOC template includes a document number, the doc no. of the full compilation will be pulled,

as the compilation is attached to the compilation doc code.

If this is not the preferred behaviour, there are alternative solutions depending on the preferred outcome:

A. TOC doc no. should be displayed only when sending the TOC independently

The doc no. can be updated using a PDF editor (e.g., Adobe) before uploading and attaching the file to the index card.

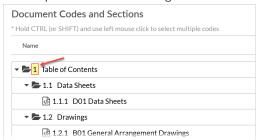
B. TOC doc no. should always be displayed (i.e., when generating the full compilation)

In the template, replace the doc no. variable with TOC doc no. as text (i.e., manually enter the TOC doc no. into the field).

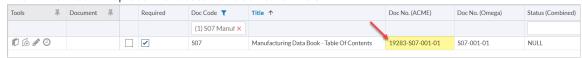
C. TOC doc no. should be displayed on TOC, but compilation doc no. should be displayed on all other section title pages

In the template, replace the doc no. variable with one of the following formulas (replacing the highlighted values):

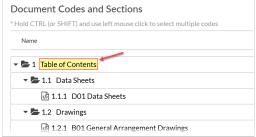
- =IF("<Section_TOCNumber>"="1","A01-123-456","<Document_CustomerDocNumber>")
 - "1" Replace with overarching section number



"A01-123-456" - Replace with customer doc no. for TOC



- =IF("<Section_TOCHeader>"="Table of Contents","A01-123-456","<Document_CustomerDocNumber>")



"A01-124-456" - Replace with customer doc no. for TOC

