

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).

Document Codes and Sections

* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes

Name

1 Table of Contents

1.1 Data Sheets

1.1.1 D01 Data Sheets

1.2 Drawings

1.2.1 B01 General Arrangement Drawings

1.2.2 B02 Detailed/Descriptive Drawing

1.2.3 B03 Misc Drawings/Supplementary Drawings

1.3 Plans & Procedures

1.3.1 P01 Shipping, Handling and Storage Procedure

1.3.2 H02 Install Procedure

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]"

Pump Project (19283) Code List

Grid row colors

Tools	Doc Code	Doc Code Name	Type	Level
	B02	Vendor Document Register	SDI Report	Order
	E09	Installation Procedure	Generated (Sub-Supplier)	Order
	E10	General Arrangement Drawings	Generated (Sub-Supplier)	Item/Model (TE)
	E11	Misc. Drawings	Generated (Sub-Supplier)	Item/Model (TE)
	L14	Performance Test Reports	Generated (Sub-Supplier)	Tag No. (TE)
	S06	Manufacturing Data Book	Compilation	Order
	S07	Manufacturing Data Book - Table Of Contents	Generated (Omega)	Order

No more pages Show on page: 20

Generated (Omega) dropdown menu:

- Compilation
- Generated (Omega)
- Generated (ACME)
- Generated (Sub-Supplier)
- Published
- SDI Report

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

Download Compilation Generate Compilation

Download Table of Contents Generate Table of Contents

Download Compilation Cover Page

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.

Pump Project (19283) Incoming Documents

File Staging Area

You can upload multiple files and keep them here while you decide where to place them.

Maximum individual file size (for normal handling) is 400Mb

Drag and drop files

Or choose files from disk

Unassigned 1 Assigned 0 Transmittal Doc 0

Unassigned Files

Table of Contents.pdf

Assign to: Document Cards Obsolete Cards

Drag and drop files into document cards

Doc Code Select or type ahead... Search

Out of Workflow Show Merged Show NULL Cards Only Show Grid row colors

Tools	Doc Code	Doc No. (Omega)	Type	Doc Code Name	Doc No.
	S06	S06-001-01		Manufacturing Data Book	
	S07	S07-001-01		Manufacturing Data Book - Table Of Contents	

Total found: 2 Selected 1 file(s)

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

Document Codes and Sections	
* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes	
Name	
▼ 1	Table of Contents
▼ 1.1	Data Sheets
1.1.1	D01 Data Sheets
▼ 1.2	Drawings
1.2.1	B01 General Arrangement Drawings

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

Tools	Document	Required	Doc Code	Title	Doc No. (ACME)	Doc No. (Omega)	Status (Combined)
			(1) S07 Manuf				
		☒	S07	Manufacturing Data Book - Table Of Contents	19283-S07-001-01	S07-001-01	NULL

- =IF("<Section_TOCHHeader>"="Table of Contents", "A01-123-456", "<Document_CustomerDocNumber>")
 - "Table of Contents" - Replace with overarching section name

Document Codes and Sections	
* Hold CTRL (or SHIFT) and use left mouse click to select multiple codes	
Name	
▼ 1	Table of Contents
▼ 1.1	Data Sheets
1.1.1	D01 Data Sheets
▼ 1.2	Drawings
1.2.1	B01 General Arrangement Drawings

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

Tools	Document	Required	Doc Code	Title	Doc No. (ACME)	Doc No. (Omega)	Status (Combined)
			(1) S07 Manuf				
		☒	S07	Manufacturing Data Book - Table Of Contents	19283-S07-001-01	S07-001-01	NULL