

Compilation Sub-Packages

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In addition to sorting cards by TOC/Bookmark pattern (see article: [Sort Cards in Compilation](#)), a compilation can be further organized by a value from the equipment list (e.g., Item/Model, Tag No., etc.) by using the sub-packages option. By creating sub-packages, the compilation will be organized per equipment list value, and the applicable documentation for each value will be grouping together.



Example: Sub-packages created per Item/Model value.

Index of Vendor Data Book	
1 Butterfly Valve	3
1.1 General Documents	4
1.1.1 H03 - Packing and Shipping Procedure	
1.1.1.1 Packing and Shipping Procedure 1234	
1.2 Engineering Documents	
1.2.1 B01 - General Arrangement Drawings	
1.2.1.1 General Arrangement Drawings Butterfly Valve	
1.2.2 C02 - Sizing Calculations	12
1.2.2.1 Sizing Calculations Tag10	13
1.2.2.2 Sizing Calculations Tag11	15
1.2.2.3 Sizing Calculations Tag12	17
1.2.2.4 Sizing Calculations Tag13	19
1.2.2.5 Sizing Calculations Tag15	21
1.3 Quality Documents	23
1.3.1 I01 - Inspection and Test Plan	24
1.3.1.1 Inspection and Test Plan Wolfe PA	25

Documents linked to the equipment units that have Butterfly Valve item/model

Sub-packages can be created either **per compilation** (which groups content by equipment value) OR **per section** (which groups content by equipment value only for the selected sections).

Compilation Sub-Packages

Allow Sub-Packages per: Compilation Enable All Fields ?

Create Sub-Packages by: Compilation
Section

Sub-packages per compilation

To establish sub-packages by compilation, choose the "Compilation" option from the "Allow Sub-Packages per:" drop-down. Once selected, the "Create Sub-Packages by:" drop-down will appear, and the desired equipment value can be selected from the available options.

Compilation Sub-Packages

Allow Sub-Packages per: Compilation Enable All Fields ?

Create Sub-Packages by: Item/Model

Create separate sub-pack

Do not create sub-packages

- Item/Model
- Line no. (Chem C)
- Line no. (Omega CAN)
- Major Tag Value
- PO no. (Chem C)
- PO rev no. (Chem C)
- Sub-Supplier
- Tag No.

Once an equipment value has been selected, the sub-package sections can be (re)ordered as needed by clicking "Open Sub-Packages List."

The screenshot shows the 'Valve Project (0005678)' interface. A dialog box titled 'Sub-Packages List for Item/Model' is open, displaying a table with the following content:

Sub-Package	Action
Pressure Transmitter	
Temp Gauges	

Below the table, there is a search bar containing 'Pressure Transmitter' and a 'Close' button. The background interface shows the 'Compilation Sub-Packages' section with 'Item/Model' selected in the 'Create Sub-Packages by' dropdown, and the 'Open Sub-Packages List' button highlighted with a red box and arrow.



Example: Sub-packages created per Item/Model value.

Each sub-package contains only the applicable documents for each equipment value.

Index of Vendor Data Book

Section	Item/Model Sub-Package	Page
1	Butterfly Valve	3
1.1	General Documents	4
1.1.1	H03 - Packing and Shipping Procedure	
1.1.1.1	Packing and Shipping Procedure 1234	
1.2	Engineering Documents	
1.2.1	B01 - General Arrangement Drawings	
1.2.1.1	General Arrangement Drawings Butterfly Valve	
1.2.2	C02 - Sizing Calculations	12
1.2.2.1	Sizing Calculations Tag10	13
1.2.2.2	Sizing Calculations Tag11	15
1.2.2.3	Sizing Calculations Tag12	17
1.2.2.4	Sizing Calculations Tag13	19
1.2.2.5	Sizing Calculations Tag15	21
1.3	Quality Documents	23
1.3.1	I01 - Inspection and Test Plan	24
1.3.1.1	Inspection and Test Plan Wolfe PA	25
2	Globe Steel Valve	27
2.1	General Documents	28
2.1.1	H03 - Packing and Shipping Procedure	
2.1.1.1	Packing and Shipping Procedure 1234	
2.2	Engineering Documents	
2.2.1	B01 - General Arrangement Drawings	
2.2.1.1	General Arrangement Drawings Globe Steel Valve	
2.2.2	C02 - Sizing Calculations	36
2.2.2.1	Sizing Calculations Tag5	37
2.2.2.2	Sizing Calculations Tag6	39
2.2.2.3	Sizing Calculations Tag7	41
2.2.2.4	Sizing Calculations Tag8	43
2.2.2.5	Sizing Calculations Tag9	45
2.3	Quality Documents	47
2.3.1	I01 - Inspection and Test Plan	48
2.3.1.1	Inspection and Test Plan ABB	49

Documents linked to the equipment units that have Butterfly Valve item/model

Documents linked to the equipment units that have Globe Steel Valve item/model

Sub-packages per section

To establish sub-packages by section, choose the "Section" option from the "Allow Sub-Packages per:" drop-down.

Compilation Sub-Packages

Allow Sub-Packages per: Section

Once selected, navigate to the "Document Codes and Sections" section. For each section that should have sub-packages, click the pencil icon (under "Tools") and select the desired equipment value from the "Create Sub-Packages by:" drop-down.

Edit Section

Name*

Put inside another section?

Create Sub-Packages by: Do not create Sub-Package

- Do not create Sub-Packages
- Equipment Type
- Item/Model**
- Line No. (Chem C)
- Line No. (Omega)
- PO No. (Chem C)
- PO Rev No. (Chem C)
- Product Type
- Sub-Supplier
- Tag No.

Cancel Save



Example: Sub-packages in the "Engineering Documents" section are created per Item/Model value. Sub-packages are created under the appropriate section, and each sub-package will contain only the applicable documents for each equipment value.

1 General Documents	3
1.1 H03 - Packing and Shipping Procedure	4
1.1.1 Packing and Shipping Procedure	5
2 Engineering Documents	7
2.1 Butterfly Valve	8
2.1.1 B01 - General Arrangement Drawings	9
2.1.1.1 General Arrangement Drawings Butterfly Valve	10
2.1.2 C02 - Sizing Calculations	12
2.1.2.1 Sizing Calculations Tag10	13
2.1.2.2 Sizing Calculations Tag11	15
2.1.2.3 Sizing Calculations Tag12	17
2.1.2.4 Sizing Calculations Tag13	19
2.1.2.5 Sizing Calculations Tag15	21
2.2 Globe Steel Valve	23
2.2.1 B01 - General Arrangement Drawings	24
2.2.1.1 General Arrangement Drawings Globe Steel Valve	25
2.2.2 C02 - Sizing Calculations	27
2.2.2.1 Sizing Calculations Tag5	28
2.2.2.2 Sizing Calculations Tag6	30
2.2.2.3 Sizing Calculations Tag7	32
2.2.2.4 Sizing Calculations Tag8	34
2.2.2.5 Sizing Calculations Tag9	36

Additional options

If required, there are additional options that allow you to create a separate sub-package for order-level doc codes and/or hide sections and/or doc codes if they do not contain any cards.

To enable the option to create a separate sub-package for all order-level documents, (a) check the appropriate box and (b) create a title for the order-level sub-section (e.g., General Documents).

Compilation Sub-Packages

Allow Sub-Packages per:

Create Sub-Packages by:

Create separate sub-package for order level docs

Name:

1 General Documents	3
1.1 H03 - Packing and Shipping Procedure	4
1.1.1 Packing and Shipping Procedure 1234	5
2 Butterfly Valve	7
2.1 Engineering Documents	8
2.1.1 B01 - General Arrangement Drawings	9
2.1.1.1 General Arrangement Drawings Butterfly Valve	10
2.1.2 C02 - Sizing Calculations	12
2.1.2.1 Sizing Calculations Tag10	13
2.1.2.2 Sizing Calculations Tag11	15
2.1.2.3 Sizing Calculations Tag12	17
2.1.2.4 Sizing Calculations Tag13	19
2.1.2.5 Sizing Calculations Tag15	21
2.2 Quality Documents	23
2.2.1 I01 - Inspection and Test Plan	24
2.2.1.1 Inspection and Test Plan Wolfe PA	25



If choosing to create a separate sub-package for order-level docs, and the compilation structure also includes sections, the "If a section does not contain any cards, hide the section" option should also be selected in order to avoid duplication within each equipment sub-package.