

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 grouped together.



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

Index of Vendor Data Book		
Item/Model Sub-Package		
1	Butterfly Valve	3
1.1	General Documents	4
1.1.1	H03 - Packing and Shipping Procedure	12
1.1.1.1	Packing and Shipping Procedure 1234	13
1.2	Engineering Documents	14
1.2.1	B01 - General Arrangement Drawings	15
1.2.1.1	General Arrangement Drawings Butterfly Valve	17
1.2.2	C02 - Sizing Calculations	18
1.2.2.1	Sizing Calculations Tag10	19
1.2.2.2	Sizing Calculations Tag11	21
1.2.2.3	Sizing Calculations Tag12	23
1.2.2.4	Sizing Calculations Tag13	24
1.2.2.5	Sizing Calculations Tag15	25
1.3	Quality Documents	26
1.3.1	I01 - Inspection and Test Plan	27
1.3.1.1	Inspection and Test Plan Wolfe PA	28

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:	<input type="button" value="Compilation"/>	<input type="checkbox"/> Enable All Fields
Create Sub-Packages by:	<input type="button" value="Compilation"/>	
	<input type="button" value="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

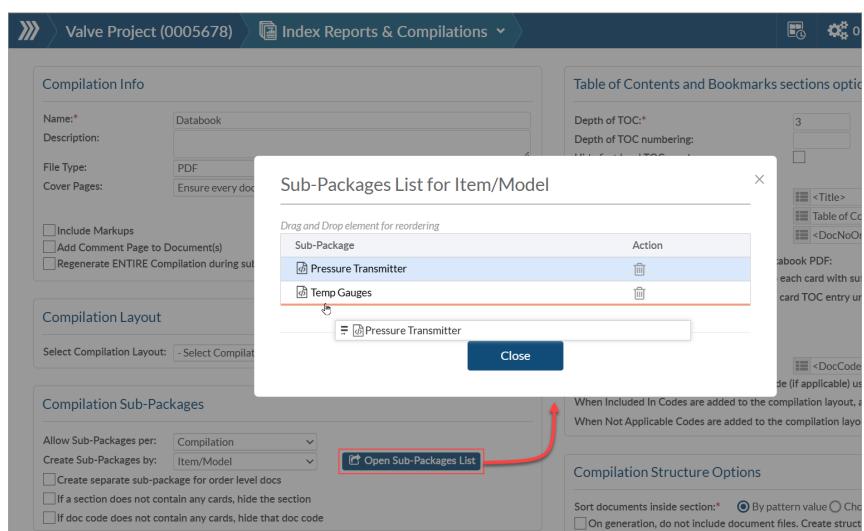
Allow Sub-Packages per: Enable All Fields [?](#)

Create Sub-Packages by: Create separate sub-packages

Do not create sub-packages

[Open Sub-Packages List](#)

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



Sub-Packages List for Item/Model

Drag and Drop element for reordering

Sub-Package	Action
Pressure Transmitter	
Temp Gauges	

Close

Compilation Sub-Packages

Allow Sub-Packages per: Enable All Fields [?](#)

Create Sub-Packages by: Create separate sub-packages

Do not create sub-packages

Create separate sub-package for order level docs

If a section does not contain any cards, hide the section

If doc code does not contain any cards, hide that doc code

[Open Sub-Packages List](#)



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	
Item/Model Sub-Package	
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	10
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	30
2.1.1.1 Packing and Shipping Procedure 1234	
2.2 Engineering Documents	
2.2.1 B01 - General Arrangement Drawings	35
2.2.1.1 General Arrangement Drawings Globe Steel Valve	
2.2.2 C02 - Sizing Calculations	37
2.2.2.1 Sizing Calculations Tag5	39
2.2.2.2 Sizing Calculations Tag6	41
2.2.2.3 Sizing Calculations Tag7	43
2.2.2.4 Sizing Calculations Tag8	45
2.2.2.5 Sizing Calculations Tag9	
2.3 Quality Documents	47
2.3.1 I01 - Inspection and Test Plan	48
2.3.1.1 Inspection and Test Plan ABB	49

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*: Engineering Documents

Put Inside another section?: No

Create Sub-Packages by: **Item/Model**

Tools: **Save**

Document Codes and Sections

Type Tools **Sort Alphabetically**

Type	Tools
Cover Page	
TOC	
Section	
Doc Code	
Section	
Doc Code	
Doc Code	



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.

Index of Vendor Data Book	
1 General Documents	3
1.1 H03 - Packing and Shipping Pro.....	4
1.1.1 Packing and Shipping Pro.....	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:	Compilation
Create Sub-Packages by:	Item/Model
<input checked="" type="checkbox"/> Create separate sub-package for order level docs	
Open Sub-Packages List	
Name:	General Document

Index of Vendor Data Book	
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.