

Compilation Sub-Packages

09/16/2024 1:40 pm MDT

When a compilation is generated without sub-packages, the output will be structured according to the data added to *Document Codes and Sections*:

Document Codes and Sections + Compilation Cover Page + Index + Section

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

Name	Type	Tools	Sort Alphabetically
Table of Contents	TOC		
1 General Documents	Section		
1.1 H03 Packing and Shipping Procedure	Doc Code		
2 Engineering Documents	Section		
2.1 B01 General Arrangement Drawings	Doc Code		
2.2 C02 Sizing Calculations	Doc Code		
3 Quality Documents	Section		
3.1 I01 Inspection and Test Plan	Doc Code		

- Includes Sections and Doc Codes

And as per the depth settings and pattern selected in *Table of Contents and Bookmarks sections options*:

Table of Contents and Bookmarks sections options

Depth of TOC:* Depth of Bookmarking:

Depth of TOC numbering: Start of TOC numbering:*

Hide first level TOC numbers

Bookmark pattern for cover page entry:*

Bookmark pattern for TOC entry:*

TOC/Bookmark pattern for cards:*

Need some help?

- Depth of TOC: 4
- Depth of TOC numbering: 4
- Start of TOC numbering: 1
- TOC/Bookmark pattern for cards: Title and Card Reference

Result

	Index of Value	Section	
1 General Documents			2
1.1 H03 - Packing and Shipping Procedure			3
1.1.1 Packing and Shipping Procedure 1234			4
2 Engineering Documents			6
2.1 B01 - General Arrangement Drawings			7
2.1.1 General Arrangement Drawings Butterfly Valve			8
2.1.2 General Arrangement Drawings Globe Steel Valve			10
2.1.3 General Arrangement Drawings Needle Steel Valve			12
2.2 C02 - Sizing Calculations			14
2.2.1 Sizing Calculations Tag1			15
2.2.2 Sizing Calculations Tag2			17
2.2.3 Sizing Calculations Tag3			19
2.2.4 Sizing Calculations Tag4			21
2.2.5 Sizing Calculations Tag5			23
2.2.6 Sizing Calculations Tag6			25
2.2.7 Sizing Calculations Tag7			27
2.2.8 Sizing Calculations Tag8			29
2.2.9 Sizing Calculations Tag9			31
2.2.10 Sizing Calculations Tag10			33
2.2.11 Sizing Calculations Tag11			35
2.2.12 Sizing Calculations Tag12			37
2.2.13 Sizing Calculations Tag13			39
2.2.14 Sizing Calculations Tag15			41
3 Quality Documents			43
3.1 I01 - Inspection and Test Plan			44
3.1.1 Inspection and Test Plan ABB			45
3.1.2 Inspection and Test Plan Wolfe PA			47

- First depth level: Section
- Second depth level: Doc Codes
- Third depth level: Cards

Compilation Sub-Packages

If the compilation structure is to be grouped by equipment value, this can be achieved using sub-packages.

Sub-packages can be created per **compilation** which will group the content per each equipment value or per **section** which will group the content only of the selected sections per equipment value.

Compilation Sub-Packages

Allow Sub-Packages per: Compilation ▼

Create Sub-Packages by:

Compilation

Section

↖

Sub-Packages per Compilation

Content of the compilation will be grouped per equipment value.

Compilation Sub-Packages

Allow Sub-Packages per:

Create Sub-Packages by:

CD Copy

CD Required

Pagination

Page Number Position:

Page Number Pattern:

- Do not create Sub-Packages
- Item/Model
- Line No. (ACME)
- Line No. (Wolfe PA)
- Master Line Number
- PO No. (ACME)
- PO Rev No. (ACME)
- Product Group
- Product Type
- Serial Number
- Shipment
- Sub-Supplier
- Tag No.

Once created, sub-package sections can be ordered as desired.

Cover Pages: Keep cover pages on returned documents

Include Markups

Add Comment Page to Document(s)

Regenerate ENTIRE Compilation during submittal process

Compilation Layout

Select Compilation Layout:

Compilation Sub-Packages

Allow Sub-Packages per:

Create Sub-Packages by:

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

Sub-Packages List for Item/Model

Drag and Drop element for reordering

Sub-Package	Action
<input type="checkbox"/> Butterfly Valve	<input type="button" value="🗑"/>
<input type="checkbox"/> Globe Steel Valve	<input type="button" value="🗑"/>
<input type="checkbox"/> Needle Steel Valve	<input type="button" value="🗑"/> <input type="button" value="📄 Needle Steel Valve"/>

Compilation Structure Options

Sort documents inside section: By pattern value Choose

On generation, do not include document files. Create structure

Result

Each sub-package will contain only the applicable documents for each equipment's 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	
	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	30
	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

3 Needle Steel Valve	51
3.1 General Documents	52
3.1.1 H03 - Packing and Shipping Procedure	
3.1.1.1 Packing and Shipping Procedure 1234	
3.2 Engineering Documents	
3.2.1 B01 - General Arrangement Drawings	
3.2.1.1 General Arrangement Drawings Needle Steel Valve	58
3.2.2 C02 - Sizing Calculations	60
3.2.2.1 Sizing Calculations Tag1	61
3.2.2.2 Sizing Calculations Tag2	63
3.2.2.3 Sizing Calculations Tag3	65
3.2.2.4 Sizing Calculations Tag4	67
3.3 Quality Documents	69
3.3.1 I01 - Inspection and Test Plan	70
3.3.1.1 Inspection and Test Plan ABB	71

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

Separate sub-package for order level documents

Notice how, in the above example, the order level document (ie. Packing and Shipping Procedure) has been included in each sub-package.

Order level documents can also be grouped in a separate section, being included only once in the compilation.

Compilation Sub-Packages

Allow Sub-Packages per:

Create Sub-Packages by:

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](#)

Name:

If compilation structure also includes sections, the checkbox: *If a section does not contain any cards, hide the section* should be marked also to avoid duplicating them within each equipment sub-package.

In these situations, since a new section will be automatically created, there is no need to include the order level documents in a separate section within *Document Codes and Sections*.

Document Codes and Sections

+ Compilation Cover Page + Index + Section

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

Name	Type	Tools	Sort Alphabetically
Table of Contents	TOC		
1 H03 Packing and Shipping Procedure	Doc Code		
2 Engineering Documents	Section		
2.1 B01 General Arrangement Drawings	Doc Code		
2.2 C02 Sizing Calculations	Doc Code		
3 Quality Documents	Section		
3.1 I01 Inspection and Test Plan	Doc Code		

Result

Order level documents will be included in a separate section and equipment value sub-packages will contain only the applicable documents (excluding order level documents).

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
3 Globe Steel Valve	27
3.1 Engineering Documents	28
3.1.1 B01 - General Arrangement Drawings	29
3.1.1.1 General Arrangement Drawings Globe Steel Valve	30
3.1.2 C02 - Sizing Calculations	32
3.1.2.1 Sizing Calculations Tag5	33
3.1.2.2 Sizing Calculations Tag6	35
3.1.2.3 Sizing Calculations Tag7	37
3.1.2.4 Sizing Calculations Tag8	39
3.1.2.5 Sizing Calculations Tag9	41
3.2 Quality Documents	43
3.2.1 I01 - Inspection and Test Plan	44
3.2.1.1 Inspection and Test Plan ABB	45


4 Needle Steel Valve	47
4.1 Engineering Documents	48
4.1.1 B01 - General Arrangement Drawings	49
4.1.1.1 General Arrangement Drawings Needle Steel Valve	50
4.1.2 C02 - Sizing Calculations	52
4.1.2.1 Sizing Calculations Tag1	53
4.1.2.2 Sizing Calculations Tag2	55
4.1.2.3 Sizing Calculations Tag3	57
4.1.2.4 Sizing Calculations Tag4	59
4.2 Quality Documents	61
4.2.1 I01 - Inspection and Test Plan	62
4.2.1.1 Inspection and Test Plan ABB	63

Sub-Packages per Sections

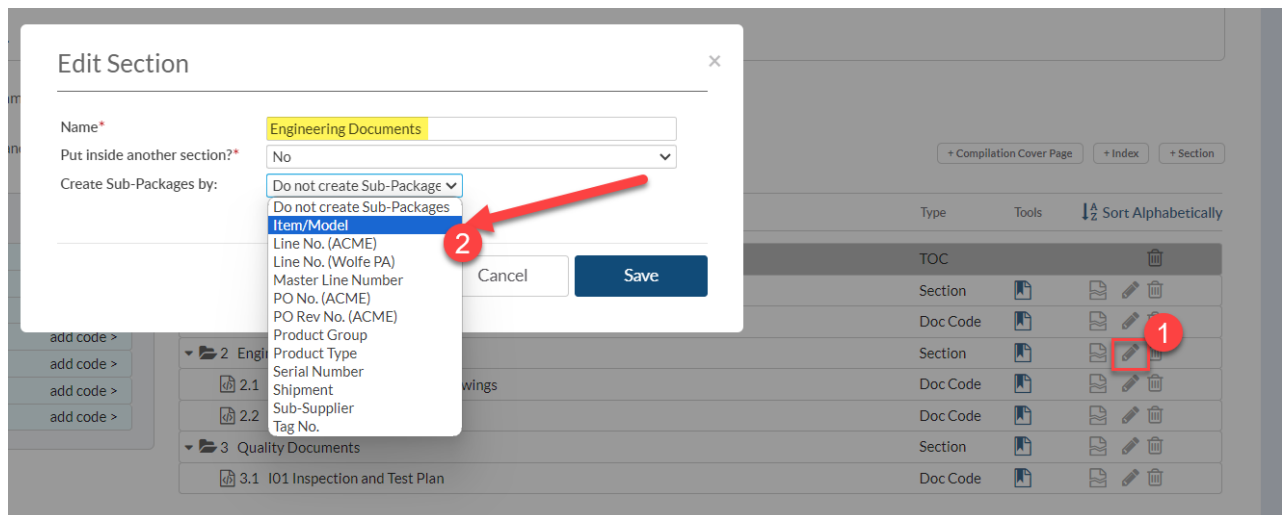
Only content of the selected sections will be grouped per equipment value.

Compilation Sub-Packages

Allow Sub-Packages per: Section ▼



Navigate to Document Codes and Sections and click on the Edit button next to the Section that should have sub-packages and select the appropriate equipment value.



The screenshot shows the 'Edit Section' dialog box with the following fields:

- Name*: Engineering Documents
- Put inside another section?*: No
- Create Sub-Packages by:
 - Do not create Sub-Package
 - Do not create Sub-Packages
 - Item/Model** (highlighted with a red circle '2')
 - Line No. (ACME)
 - Line No. (Wolfe PA)
 - Master Line Number
 - PO No. (ACME)
 - PO Rev No. (ACME)
 - Product Group
 - Product Type
 - Serial Number
 - Shipment
 - Sub-Supplier
 - Tag No.

Buttons: Cancel, Save

The background shows the 'Document Codes and Sections' table with the following rows:

Type	Tools	Sort Alphabetically
TOC		
Section	[Icons]	
Doc Code	[Icons]	
Section	[Icons]	
Doc Code	[Icons]	
Doc Code	[Icons]	
Section	[Icons]	
Doc Code	[Icons]	

A red circle '1' highlights the edit icon in the 'Section' row.

Result

Sub-packages are created under the selected section grouping each document per the 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
2.3	Needle Steel Valve	38
2.3.1	B01 - General Arrangement Drawings	39
2.3.1.1	General Arrangement Drawings Needle Steel Valve	40
2.3.2	C02 - Sizing Calculations	42
2.3.2.1	Sizing Calculations Tag1	43
2.3.2.2	Sizing Calculations Tag2	45
2.3.2.3	Sizing Calculations Tag3	47
2.3.2.4	Sizing Calculations Tag4	49
3	Quality Documents	51
3.1	I01 - Inspection and Test Plan	52
3.1.1	Inspection and Test Plan ABB	53
3.1.2	Inspection and Test Plan Wolfe PA	55

Section

Item/Model Sub-Package