

# Create Package of Cards

07/04/2025 3:14 pm MDT

When files need to be managed individually but the customer requires that all related files be submitted together, the package function can be used. This function works by create cards for each individual file, while also auto-creating a package of the cards for submittal.



**Example:** There is one drawing for each tag, and the customer would like all the drawings to be packaged and submitted together.

## Create a package

To create a package, navigate to the code list (Project Menu > Cards > Code List). To create a package, perform one of the following actions:

### Option 1: Create package for a single code

Click the package icon beside the specific code.

The screenshot shows the 'Code List' interface for 'Pump Project (1234)'. The table lists various codes with columns for Doc Code, Doc Code Name, Level, Type, Required, Stage List, and Cover Page / Stamps. The 'B01' row is highlighted in red. A red arrow points to the 'Create Packages' icon in the 'Tools' column.

| Tools | Doc Code   | Doc Code Name                                   | Level                       | Type                     | Required | Stage List           | Cover Page / Stamps        |
|-------|------------|---|-----------------------------|--------------------------|----------|----------------------|----------------------------|
|       | A01        | Seller Document Register                        | Order                       | SDI Report               | 1/1      | IFA                  | No stamp and no cover page |
|       | B01        | General Arrangement Drawings (GAD's)            | Tag No. (TE)                | Generated (Sub-Supplier) | 12/12    | IFA                  | Cover page only (no stamp) |
|       | B02        | Misc Drawings/Descriptive Drawings              | Item/Model (TE)             | Generated (Sub-Supplier) | 3/3      | IFA                  | Cover page only (no stamp) |
|       | M01        | Material Certificates                           | Tag No. (TE)                | Generated (Sub-Supplier) | 12/12    | IFA                  | Cover page only (no stamp) |
|       | MTR - All  | Material Test Reports                           | Line Number (Customer) (TE) | Compilation              | 12/12    | IFA                  | Cover page only (no stamp) |
|       | MTR - Ind. | Individual MTR Certs                            | Certificate                 | Published                | 12/12    | Hide Cards from Cust | Cover page only (no stamp) |
|       | P01        | Shipping, Handling and Storage Procedure        | Sub-Supplier                | Generated (Sub-Supplier) | 1/1      | IFA                  | Cover page only (no stamp) |
|       | Q02        | Quality Control Plan and Inspection & Test Plan | Sub-Supplier                | Generated (Sub-Supplier) | 1/1      | IFA                  | Cover page only (no stamp) |
|       | R04        | Manufacturer's Record Book                      | Order                       | Compilation              | 1/1      | IFA                  | Cover page only (no stamp) |

### Option 2: Create packages for many codes at once

1. Select one (or multiple) codes to be packaged
2. Click the "Actions" button above the grid
3. Select the "Create Packages" option

The screenshot shows the 'Grid row colors' window with a table of document codes. A red circle with the number '1' points to the 'Tools' column. A red circle with the number '2' points to the 'Actions' dropdown menu. A red circle with the number '3' points to the 'Create Packages' option in the context menu.

| Tools | Doc Code ↑                              | Doc Code Name   | Level           | Type                     |
|-------|---|---|-----------------|--------------------------|
|       | <input type="checkbox"/> A01            | Supplier Document Register                                | Order           | Generated (Sub-Supplier) |
|       | <input checked="" type="checkbox"/> B01 | General Arrangement Drawings                              | Item/Model (TE) | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> C04            | Bill of Materials   | Item/Model (TE) | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> C15            | Equipment Vendor Catalogue Sheets                         | Item/Model (TE) | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> D01            | Data Sheets   | Order           | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> G02            | Preservation Procedure and Handling & Shipping Procedures | Sub-Supplier    | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> H05            | Non-Destructive Exam. Procedures (NDE)                    | Sub-Supplier    | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> J01            | Operating & Maintenance Manual                            | Sub-Supplier    | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> J02            | Lube Oil & Operating Fluids Schedule                      | Order           | Generated (Sub-Supplier) |
|       | <input type="checkbox"/> K01            | Vendor Data Book  | Order           | Generated (Sub-Supplier) |

Context Menu:

- Create Packages
- Create Translation Cards
- Delete Selected
- Set Query
- Update Routing Scenario

Footer: Select page: A01 - K01 [...], Show on page: 10, Select all (this page only)

After creating the package, the code splits in two lines; the first line is the packaged code which is set to "Order" level (Type = Compilation), and the second line is the code for each individual card (indicated by the "(Each)" suffix), which maintains the level that was set prior to packaging (e.g., "Tag").

The stage list of the "each" code can be set to "Hide Cards from Customer," to prevent the individual cards from being queued for submittal. Packaging will also prompt the auto-creation of a package compilation (accessible from **Project Menu > Index Reports & Compilations**), with the "each" code being added to the structure automatically.

## Packages in the card list

Once a package has been created on the code list, the changes are automatically reflected in the card list. There will be "each" cards created to individually manage the documents (as defined by the "level" set on the code list), and one card created for the compilation package.



**Cards**

## Card List

Standard Query

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Keyword  Filter set Select Filter Set + [Icons]

+ Date and Non-Column Filters Doc Code IN: B01 (All) Clear Auto Search

| Tools         | Required                            | Doc Code                 | Doc Code Name                                   | Doc No. (Omega) | Tag No. List                 | Stage | Status (Combined) | Card Name(Auto) | Status G |
|---------------|-------------------------------------|--------------------------|---|-----------------|------------------------------|-------|-------------------|-----------------|----------|
| (1) B01 (All) |                                     | B01                      | General Arrangement Drawings (GAD's)            | B01-016-01      | A001,A002,A003,A004,A005,... | IFA   | X                 | B01_5678        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A003                         | HC    | NULL              | B01_A003        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A004                         | HC    | NULL              | B01_A004        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A005                         | HC    | NULL              | B01_A005        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A006                         | HC    | NULL              | B01_A006        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A007                         | HC    | NULL              | B01_A007        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A008                         | HC    | NULL              | B01_A008        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A009                         | HC    | NULL              | B01_A009        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A010                         | HC    | NULL              | B01_A010        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A011                         | HC    | NULL              | B01_A011        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A001                         | HC    | NULL              | B01_A001        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A002                         | HC    | NULL              | B01_A002        | Not App  |
| [Icons]       | <input checked="" type="checkbox"/> | <input type="checkbox"/> | B01 General Arrangement Drawings (GAD's) (Each) |                 | A012                         | HC    | NULL              | B01_A012        | Not App  |

No more pages Show on page: 20 Items on page: 13 Total found: 13

Grid row colors Notes for changing/uploading Doc No. filds

# Upload incoming file(s)

If receiving returned files individually, files should be attached to the individual "each" cards. It can be helpful to filter the grid by the doc code with the "(Each)" suffix.

**File Staging Area** Viewer **OFF**

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

To Match 6 Matched 0 Transmittal Doc 0

**To Match Files** Run Matching

Actions

| File Name      | Pages | Tools |
|----------------|-------|-------|
| Document 1.pdf | 1     |       |
| Document 2.pdf | 1     |       |
| Document 3.pdf | 1     |       |
| Document 4.pdf | 1     |       |
| Document 5.pdf | 1     |       |
| Document 6.pdf | 1     |       |

**Match Files to:** Document Cards Obsolete Cards

Drag and drop files into document cards

Doc Code

B01 General Arrangement Drawings (GAD's) (Each)

A01 Seller Document Register

B01 General Arrangement Drawings (GAD's)

B01 General Arrangement Drawings (GAD's) (Each)

B01 (All)

B02 Misc Drawings/Descriptive Drawings

M01 Material Certificates

MTR - All Material Test Reports

MTR - Ind. Individual MTR Certs

Search

Only Show Grid row colors Add Merge

| Doc No. (Chem C)                            | Doc No. (Omega) | Tools | Doc Code |
|---|-----------------|-------|----------|
| GAD's (Each)                                | B01-001-01      |       | B01      |
| GAD's (Each)                                | B01-002-01      |       | B01      |
| GAD's (Each)                                | B01-003-01      |       | B01      |
| GAD's (Each)                                | B01-004-01      |       | B01      |
| GAD's (Each)                                | B01-005-01      |       | B01      |
| GAD's (Each)                                | B01-006-01      |       | B01      |
| GAD's (Each)                                | B01-007-01      |       | B01      |
| GAD's (Each)                                | B01-008-01      |       | B01      |
| GAD's (Each)                                | B01-009-01      |       | B01      |
| GAD's (Each)                                | B01-010-01      |       | B01      |
| GAD's (Each)                                | B01-011-01      |       | B01      |
| NULL  |                 |       | B01      |
| General Arrangement Drawings (GAD's) (Each) |                 |       | B01      |
| General Arrangement Drawings (GAD's) (Each) |                 |       | B01      |
| General Arrangement Drawings (GAD's) (Each) |                 |       | B01      |
| General Arrangement Drawings (GAD's) (Each) |                 |       | B01      |
| General Arrangement Drawings (GAD's) (Each) |                 |       | B01      |
| General Arrangement Drawings (GAD's) (Each) |                 |       | B01      |

Total found: 12



If files are returned in the packaged format, they should be attached to the packaged card and unpacked (see article: [Unpack Packaged Cards](#)). It is also possible to return the packaged file without unpacking (see article: [Upload Zip File without Unpacking](#))

## Generate package and submit

When you are ready to submit a package (i.e., all component "each" files have been uploaded), navigate to outgoing submittals (**Project Menu > Cards In/Out > Outgoing Submittals**) and it will appear in the outgoing document list.



If all "each" cards are in stage complete (Z) but the package compilation is **not** appearing in the outgoing queue, re-generate the package compilation on the code list. Once re-generated, refresh the "Outgoing Submittals" page.

| Tools                   | Doc Code  | Doc Code Name                               | Level                       |
|-------------------------|-----------|---|-----------------------------|
|                         | A01       | Seller Document Register                    | Order                       |
| Re-generate Compilation | B01       | General Arrangement Drawings (GAD's)        | Order                       |
|                         | B01       | General Arrangement Drawings (GAD's) (Each) | Tag No. (TE)                |
|                         | B02       | Misc Drawings/Descriptive Drawings          | Item/Model (TE)             |
|                         | M01       | Material Certificates                       | Tag No. (TE)                |
|                         | MTR - All | Material Test Reports                       | Line Number (Customer) (TE) |

For more examples and details about packages, see this video: [Packing & Unpacking](#)

