

Create Package of Cards

12/02/2025 12:12 pm MST

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, and the 'Create Packages' icon is visible in the left-hand tools menu.

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

Grid row colors

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

Select page: A01 - K01 [...] Show on page: 10

Actions: Create Packages, Create Translation Cards, Delete Selected, Set Query, Update Routing Scenario

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 will be set to "zHC-IFA," which is a system-generated stage list that prevents 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.

Pump Project (1234) Code List

Grid row colors

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 cov
	B01	General Arrangement Drawings (GAD's)	Order	Compilation	1/1	IFA	Cover page only (no
	B01	General Arrangement Drawings (GAD's) (Each)	Tag No. (TE)	Generated (Sub-Supplier)	12/12	zHC-IFA	Cover page only (no
	B02	Misc Drawings/Descriptive Drawings	Item/Model (TE)	Generated (Sub-Supplier)	3/3	IFA	Cover page only (no
	M01	Material Certificates	Tag No. (TE)	Generated (Sub-Supplier)	12/12	IFA	Cover page only (no
	MTR - All	Material Test Reports	Line Number (Customer) (TE)	Compilation	12/12	IFA	Cover page only (no
	MTR - Ind.	Individual MTR Certs	Certificate	Published	12/12	Hide Cards from Customer	Cover page only (no
	P01	Shipping, Handling and Storage Procedure	Sub-Supplier	Generated (Sub-Supplier)	1/1	IFA	Cover page only (no
	Q02	Quality Control Plan and Inspection & Test Plan	Sub-Supplier	Generated (Sub-Supplier)	1/1	IFA	Cover page only (no
	R04	Manufacturer's Record Book	Order	Compilation	1/1	IFA	Cover page only (no

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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.



Only the package card will have a document number. The "each" cards are for internal management only and are not numbered.

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
	<input type="checkbox"/>	A01	Seller Document Register	Order
	<input type="checkbox"/>	B01	General Arrangement Drawings (GAD's)	Order
	<input type="checkbox"/>	B01	General Arrangement Drawings (GAD's) (Each)	Tag No. (TE)
	<input type="checkbox"/>	B02	Misc Drawings/Descriptive Drawings	Item/Model (TE)
	<input type="checkbox"/>	M01	Material Certificates	Tag No. (TE)
	<input type="checkbox"/>	MTR - All	Material Test Reports	Line Number (Customer) (TE)

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