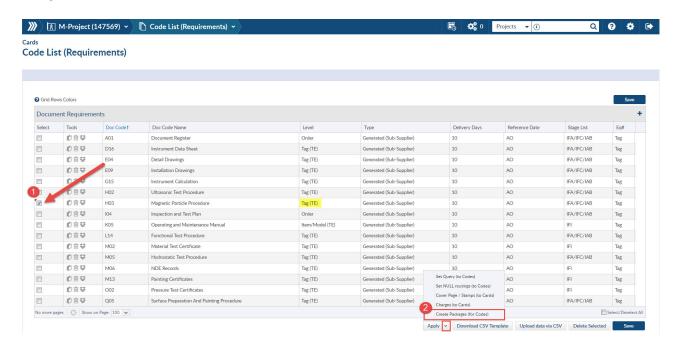# Auto-Creating Packages

09/16/2024 1:43 pm MDT

Assume you have a drawing for each tag, but your customer requires that you submit only **ONE PACKAGE** containing all drawings (sorted by tag numbers).

DocBoss makes this process easier by helping you manage each individual drawing (upload them into separate separate cards) but auto-creating the packages for submittal.

How to create packages from the Code List

Navigate to the Code List and:

Create packages for many codes at once:

1. Select one (or many) codes which need to be packaged.

2. Click apply below the grid, then select **Create Packages per Doc Codes**

OR

Create package for a single code

Click the package icon beside the specific code.

Results of Package creation.

After creating the package, the code splits in two lines.

The first line is automatically created at the Order Level. Type = Compilation. You can see that the package compilation is created (containing only the one code) and is linked to this code. The normal tool options are also available to unlink or re-generate the compilation.

In the **second line** the Stage List is changed to Hide Registers from Customer and we add the characters "(Each)" to the doc code name.
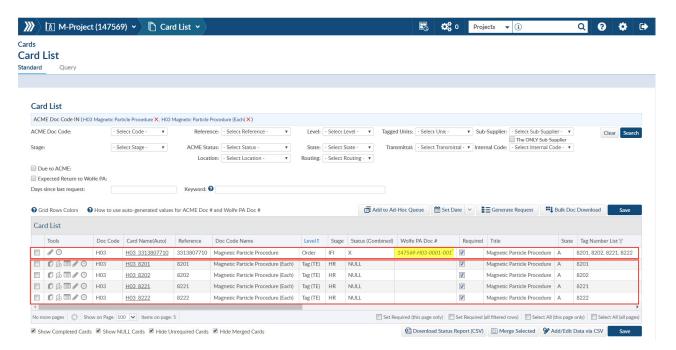
By default, when creating a package for any given code, DocBoss sets the stage list for the original "Each" codes to "Hide from Customer". DocBoss now checks the status of any existing cards, and if any cards have been submitted out of the system, the user may choose to keep the original stage on the code.

Select	Tools	Doc Code↑	Doc Code Name	Level	Type	Delivery Days	Reference Date	Stage List	Eq#
☐		A01	Document Register	Order	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		D16	Instrument Data Sheet	Tag (TE)	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		D04	Detail Drawings	Tag (TE)	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		E09	Installation Drawings	Tag (TE)	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		G15	Instrument Calculation	Tag (TE)	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		H02	Ultrasonic Test Procedure	Tag (TE)	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		H03	Magnetic Particle Procedure	Order	Compilation	10	AO	IFI	Tag
☐		H03	Magnetic Particle Procedure (Each)	Tag (TE)	Generated (Sub-Supplier)	10	AO	Hide Registers from Customer	Tag
☐		I04	Inspection and Test Plan	Order	Generated (Sub-Supplier)	10	AO	IFA/IFC/IAB	Tag
☐		K05	Operating and Maintenance Manual	Item/Model (TE)	Generated (Sub-Supplier)	10	AO	IFI	Tag

Impact on the Card List

All changes are automatically reflected in the Card List grid. If 4 tags, you will now see five different cards. One corresponding to the compilation package and the other four corresponding to the original "tag level" code.
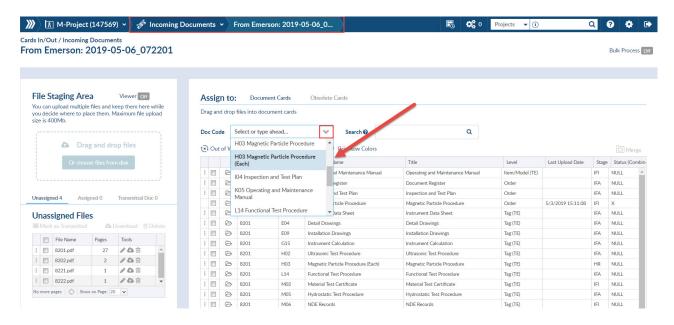
NOTE: Only the package will have a document number. The cards created to EACH file are for internal management only and are not numbered.
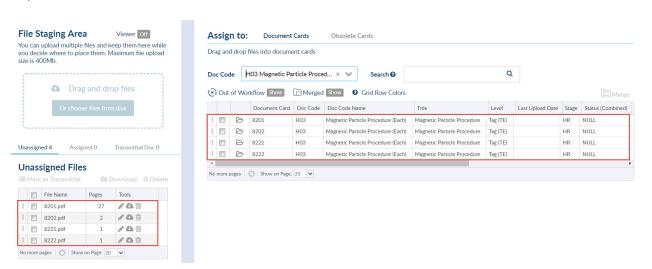

Upload and match files

Upload the files for each card line in Incoming Documents grid and match them with the Doc Name which included the "(Each)" descriptor.
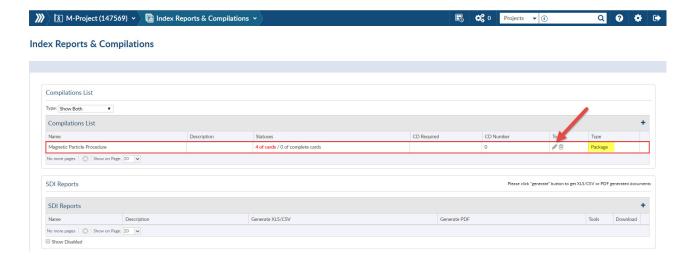
Step 1

Step 2

Review, Preview and Edit Packages

Each package is listed in the compilations list. Note the TYPE column will identify if the line in the grid is a package (highlighted), or a normal user-created compilation.

Index Reports & Compilations

Compilations List

Type: Show Both ▼

Compilations List							**+**
Name	Description	Statuses	CD Required	CD Number	To...	Type	
Magnetic Particle Procedure		4 of cards / 0 of complete cards		0	✎ 🗑	Package	

No more pages | ⚙ | Show on Page: 20 ▼

SDI Reports   Please click "generate" button to get XLS/CSV or PDF generated documents

SDI Reports					**+**
Name	Description	Generate XLS/CSV	Generate PDF	Tools	Download

No more pages | ⚙ | Show on Page: 20 ▼

☐ Show Disabled

You can edit/preview each package as you would a compilation. See here for more detail about editing compilations.

Generate package and submit

When you are ready to submit the package, navigate to the outgoing submittals screen. it should appear in the outgoing document list. NOTE: If all component "(Each)" files are not uploaded, the package may not show in the outgoing submittal screen.

Receive returned compilation

When you receive the returned compilation, we give the option to process the whole compilation as a single document or to un-pack and auto-split each of the original pages back into their components. More information related to un-packing is included in the article: Unpack

For more examples and details about packages have a look at our video "Packing & Unpacking".