

Create Package of Cards

06/20/2025 4:40 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 with a table of codes. The table has columns: Doc Code, Doc Code Name, Level, Type, Required, Stage List, and Cover Page / Stamps. The 'B01' row is highlighted with a red box. A red arrow points to the 'Create Packages' icon 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 "Apply" button below the grid
3. Select the "Create Packages (for Codes)" option

Pump Project (1234) Code List

Grid row colors

| Tools | Doc Code | Doc Code Name | Level | Type |
|-------|------------|---|-----------------------------|--------------------------|
| | A01 | Seller Document Register | Order | SDI Report |
| | B01 | General Arrangement Drawings (GAD's) | Tag No. (TE) | Generated (Sub-Supplier) |
| | B02 | Misc Drawings/Descriptive Drawings | Item/Model (TE) | Generated (Sub-Supplier) |
| | M01 | Material Certificates | Tag No. (TE) | Generated (Sub-Supplier) |
| | MTR - All | Material Test Reports | Line Number (Customer) (TE) | Compilation |
| | MTR - Ind. | Individual MTR Certs | Certificate | Published |
| | P01 | Shipping, Handling and Storage Procedure | Sub-Supplier | Generated (Sub-Supplier) |
| | Q02 | Quality Control Plan and Inspection & Test Plan | Sub-Supplier | Generated (Sub-Supplier) |
| | R04 | Manufacturer's Record Book | Order | Compilation |

Set Query (to Codes)
Cover Page / Stamps (to Cards)
Charges (to Cards)
Update eSign (on Cards)
Update Routing Scenario (for Codes)
Create Packages (for Codes)
Create Translation Cards (for Codes)
Stamp Template (to Cards)

Stage List

| Stage List | Cover Page / Stamps |
|------------|----------------------------|
| IFA | No stamp and no cover page |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |
| IFA | Cover page only (no stamp) |

Apply Download CSV Template Upload Data via CSV Delete Selected Save

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.

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 | Hide Cards from Customer | 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 |

Apply Download CSV Template Upload Data via CSV Delete Selected Save

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](#)