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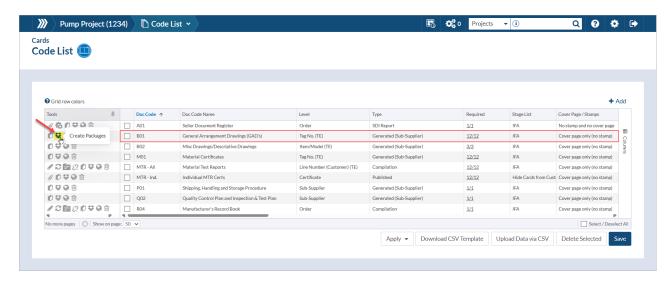
> 💡 **Example**: There is one drawing for each tag, and the customer would like all the drawings to be packaged and submitted together.

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:
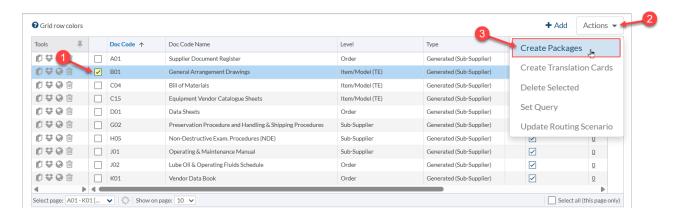
Option 1: Create package for a single code
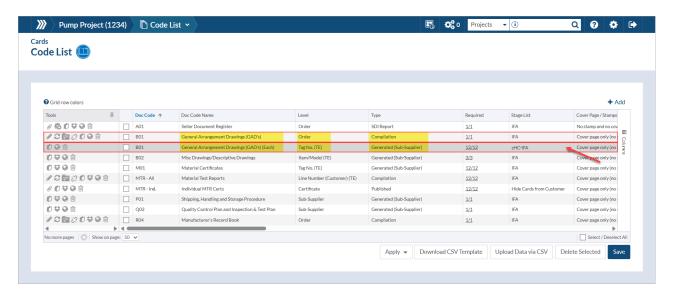Click the package icon beside the specific code.

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

After creating the package, the code splits in two lines; the <u>first</u> line is the packaged code which is set to "Order" level (Type = Compilation), and the <u>second</u> 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.
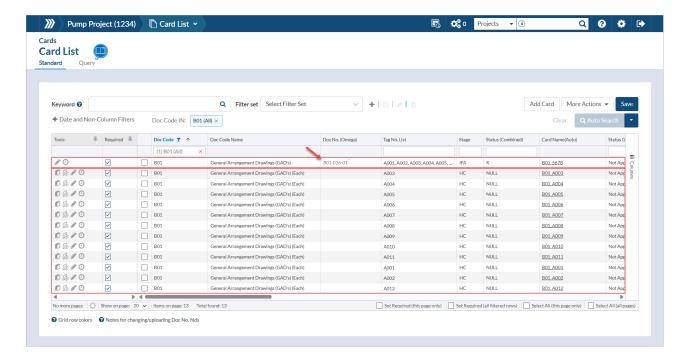

Packages in the card list

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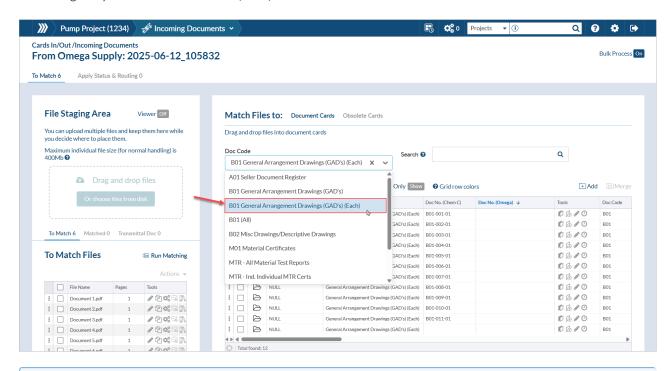
> Only the package card will have a document number. The "each" cards are for internal management only and are not numbered.

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.
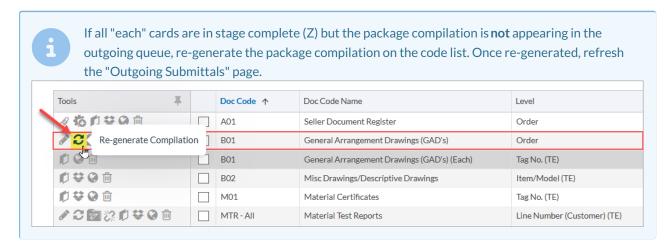

> ℹ️ If files are returned in the packaged format, they should be attached to the packaged card and unpacked (see article: Unpack Packaged Cards. It is also possible to return the packaged file without unpacking (see article: Upload Zip File without Unpacking)

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.

> ℹ️ 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