

Understanding the Split Parameter in Bulk Matching Process



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If the uploaded files don't match with any card, we show you an error in the top area of the matching screen.

You can check the cause by hovering over the error symbol.

Matching Uploaded Files to Document Cards

Files that could not be matched
Unmatched files will remain in the staging area.







File Name	Pages	Error	Tools
P7564-PO018-400-30-BOM-0010_A1.pdf	27		


No more pages |  Show on Page: 20

Testing bulk match parameters

Select the info icon for the card you wish to test with.

Files that could not be matched
Unmatched files will remain in the staging area.

File Name	Pages	Error	Tools
15327-D16-002-01_sub001_rev0.pdf	1		 
15327-D16-004-01_sub001_rev0.pdf	1		 

No more pages |  Show on Page: 20

A popup will appear showing all segments which are compared against the document numbers in the Card List for potential matches.

Files that could not be matched

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File Name	Pages	Error	Tools
15327-D16-002-01_sub001_rev0.pdf	1	⚠	🔧 ⓘ
15327-D16-002-01_sub001_rev0.pdf			

No more pages | Show on Page: 20

Info

Using the parameter(s) "-" the following splits will be created for matching (each run separately)

- 1 15327
- 2 D16
- 3 002
- 4 01_sub001_rev0

In this case, none of the splits shown are a match for any document numbers on the project, so a hyphen would not be the correct choice for split parameter. (In this example, the correct split parameter would be an underscore.)

Changing the SPLIT PARAMETER

If the description is: "Files doesn't match any active card in Project", and the file name is accurate, take a look at the split parameter. The split parameter cuts the filename into little pieces based on the parameter.

For example, if your document number is: P7564-PO018-400-30-BOM-0010_A1 and your split parameter is "-", DocBoss tried to match the data between each hyphen, which doesn't match the doc number, so it fails.

We try to match:

P7564 OR PO018 OR 400 OR 30 OR BOM OR 0010

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No more pages | Show on Page: 20

Give unmatched files another chance

You can change the split parameter, or edit the file name, and re-run the matching process.

The files you already matched will not be affected.

Define split parameters

*Values must be inside quotation marks e.g. "-"

*Separate multiple values by a comma e.g. "_,_"

Input: "-"

Re-run matching

In this example the correct split parameter that we should use is "_" because the system will take all the information before and after the underscore:

i.e. P7564-PO018-400-30-BOM-0010OR A1

Of course, A1 is not a doc number, so it doesn't match anything and is discarded, BUT P7564-PO018-400-30-BOM-0010 DOES match a document number.

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File Name	Pages	Error	Tools
No more pages			

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Define split parameters

*Values must be inside quotation marks e.g. " _ "
*Separate multiple values by a comma e.g. " _ , "

Re-run matching

Matching Files

Suggested file-document card matches will appear (with values highlighted) if the file name matches with the document card info.

Unmatched files will remain in the staging area.

Unmatch

File Name	Card Name(Auto)	AMEC Doc #	DEMO Doc #	A
P7564-PO018-400-30-BOM-0010_A1.pdf	BOM_E14016-PO-018-RM-400-P-0013	P7564-PO018-400-30-BOM-0010	QLNG-BA00-QCL-RPT-000250	

Cancel

Accept Matches

Further understanding of the SPLIT PARAMETERS

Additional examples of split parameters as follows:

Parameter: "-"

File Name: J02-12341-1234-134-134-Code-A

- 1) J02
- 2) 12341
- 3) 1234
- 4) 134
- 5) 134
- 6) Code
- 7) A

If you have an underscore instead between the number and the Code-A you get:

Parameter: "_"

File Name: J02-12341-1234-134-134_Code-A

- 1) J02-12341-1234-134-134 [this will match]

2) Code-A

If you get a bit creative (if all files have -Code-XXX), you can use more than one character for the match:

Parameter: "-Code"

File Name: J02-12341-1234-134-134-Code-A

1) J02-12341-1234-134-134 [This will match]

2) -A

Note: If DocBoss cannot locate the split parameter you've chosen, it will run the match on the entire text.

What if:

Your customer includes the revision number in the document number with no "split" to differentiate between the document number and the revision?

File Name: 4531KR-MR-001-01-A

Card Document Number: 4531KR-MR-001-01

As long as you have the **document number and revision in separate fields** in DocBoss, the split parameter for this case is: "-A"

1) 4531KR-MR-001-01 [This will match]

2) -A

However, if your customer has included the revision as part of their actual document number and you've copied that number into the card list, the bulk match won't work without you editing the file names each time they come in.

File Name: 4531KR-MR-001-01-A

Card Document Number: 4531KR-MR-001-01-0

You will need to edit the File Name: 4531KR-MR-001-01-0 to exactly match the card document number.

In this case, we strongly suggest you use the revision column. The Document number should be 4531KR-MR-001-01 and the revision should be 0. This way you could run the matching.

For more on bulk matching see, [Bulk Processing for Incoming Documents](#).
