# Unpack Packaged Cards

06/23/2025 11:02 am MDT

If individual files from a package are returned in the packaged format, they should be attached to the packaged card and unpacked.

To begin the process on unpacking, navigate to the incoming documents page (**Project Menu > Cards In/Out > Incoming Documents**). Bring the file in as usual, and assign the incoming package to the package card (i.e., the card without the "(Each)" suffix). Once assigned, a notification will appear indicating that the option to unpack is available once file processing is complete.
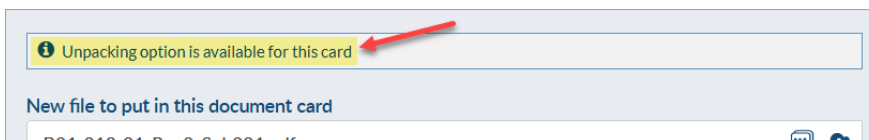

After processing the file, a pop-up will appear providing the following options:

- Unpack the file? Yes or no.
- Navigate immediately to the sub-folder to complete the unpacking? Yes or no (checkbox).
  - If checked, user will be redirected to the unpacking sub-folder
  - If unchecked, user can process the file and return to unpack later
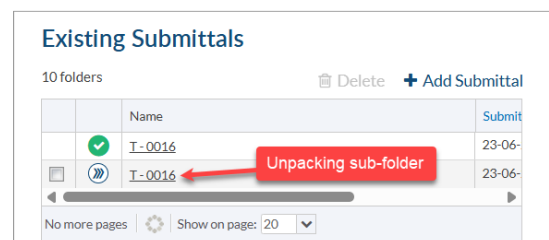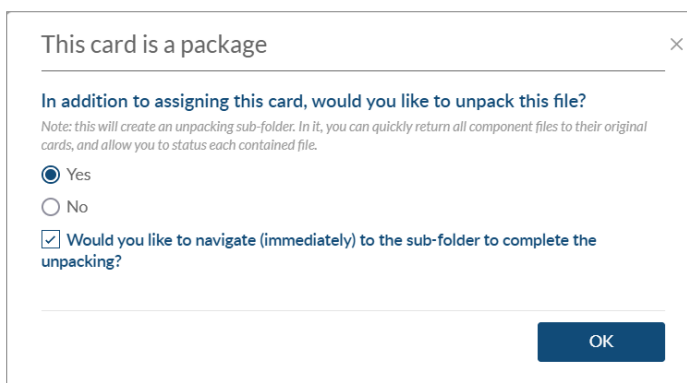
Unpacking

If the option to unpack has been selected, an unpacking sub-folder is created and the auto-generated results can be reviewed.
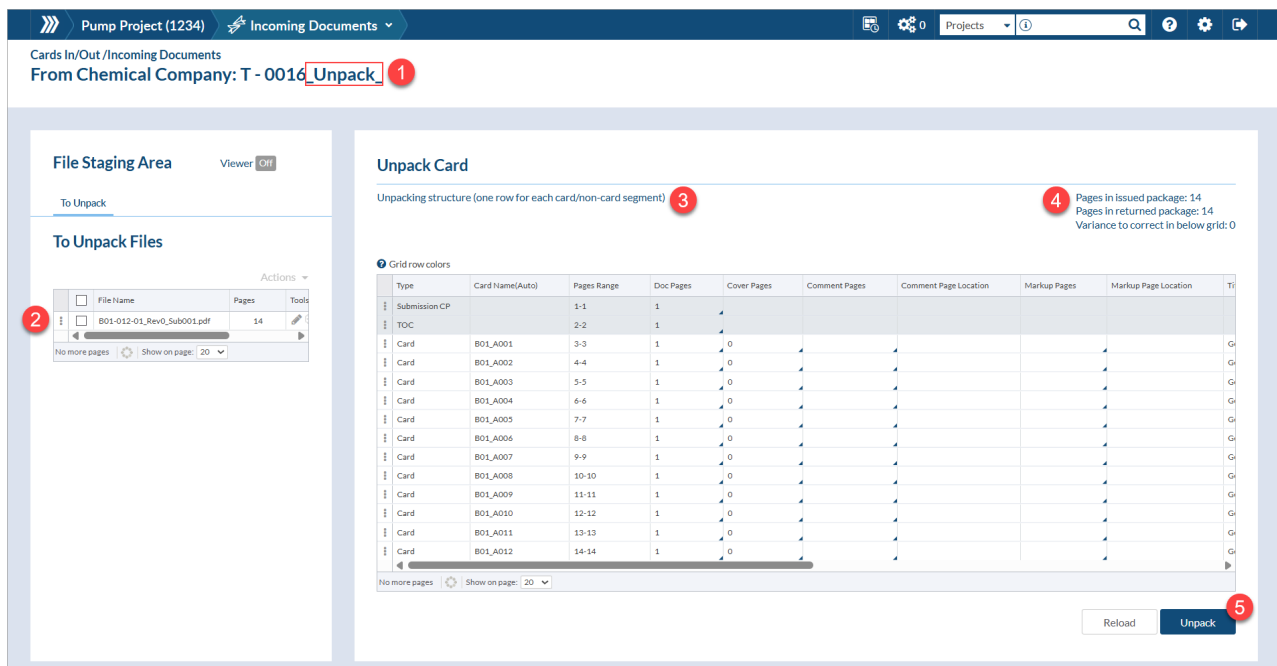
1. Sub-folder name, which adds "_Unpack_" to the original submittal number.
   - *Note: In the submittals list (and on reports), only the original submittal number is shown.*

2. Card which is being unpacked.
   - *Note: This is a **copy** of the uploaded file. The original assignment is still in place, but pages can now be assigned to each individual card.*

3. Grid matching "each" cards to pages in the uploaded file. Values can be edited in the grid.

4. Grid summary, identifying the pages issued, returned, and any variance (if applicable).
   - *Note: The variance must balance to 0 to allow unpacking.*

5. Unpack button, which proceeds to split the file(s) and assign to cards.

Edit segments

If the package was edited before returning, the pre-populated data can be adjusted to reflect the structure of the returned file.

Page counts, cover pages & comment pages

If cover pages or doc pages were removed, comment pages were added, etc., that information can be adjusted in the grid, and the value in the "Pages Range" column will auto-update.

Note: Any adjustments made must result in a variance of 0 before unpacking can be completed.

Unpack Card

Unpacking structure (one row for each card/non-card segment)

Pages in issued package: 14
Pages in returned package: 14
Variance to correct in below grid: 2

Grid row colors

Type	Card Name(Auto)	Pages Range	Doc Pages	Cover Pages	Comment Pages	Comment Page Location	Markup Pages	Markup Page Location	Ti
Submission CP		1-1	1						
TOC		2-2	1						
Card	B01_A001	3-3	1	0					G
Card	B01_A002	4-4	1	0					G
Card	B01_A003	5-6	1	0	1	End			G
Card	B01_A004	7-8	2	0					G
Card	B01_A005	9-9	1	0					G
Card	B01_A006	10-10	1	0					G
Card	B01_A007	11-11	1	0					G
Card	B01_A008	12-12	1	0					G
Card	B01_A009	13-13	1	0					G
Card	B01_A010	14-14	1	0					G
Card	B01_A011	15-15	1	0					G
Card	B01_A012	16-16	1	0					G

No more pages   Show on page: 20

Reload   Unpack

Reorder cards

If the order of the cards was adjusted, the grid can be rearranged to match the returned file.

Grid row colors

Type	Card Name(Auto)	Pages Range	Doc Pages	Cover Pages	Comment Pages	Comment Page Location	Markup Pages	Markup Page Location	Ti
Submission CP		1-1	1						
TOC		2-2	1						
Card	B01_A001	3-3	1	0					G
Card	B01_A002	4-4	1	0					G
Card	B01_A003	5-6	1	0	1	End			G
Card	B01_A004	7-8	2	0					G
Card	B01_A005	9-9	1	0					G
Change position	B01_A006	10-10	1	0					G
Card	B01_A007	11-11	1	0					G
Card	B01_A008	12-12	1	0					G
Card	B01_A009	13-13	1	0					G
Card	B01_A010	14-14	1	0					G
Card	B01_A011	15-15	1	0					G
Card	B01_A012	16-16	1	0					G

No more pages   Show on page: 20

Reload   Unpack

Add or remove segments

If certain cards are not returned, they can be removed from the grid. In addition, non-card segments can be added to reflect additional pages in the package (e.g., the customer embedded old cards into the package). After unpacking, non-card segments can be assigned back into existing cards.

To add a non-card segment, click the "+" icon (under "Tools") beside the appropriate card and choose the type:

1. Non-Card Segment

2. Package Comment Sheet - see below.

Add package comment sheet

If **all** comments are added to a <u>single comment sheet</u> for the entire package (as opposed to a comment sheet per-returned card), a set of pages can be designated as the package comment sheet, and will then be circulated with each individual card.

Example: Comments are included on the cover page of the package (instead of on an additional comment sheet), and this page needs to be circulated with each individual card. To accomplish this, first add the package comment sheet. Once added, the cover page can be removed and the appropriate page range can be set for the comment sheet.

	Tools	Type	Card Name(Auto)	Pages Range	Doc Pages	Cover Pages	Comment Pages	Comment Page Location	Markup Pages	Markup F
	🗑	Submission CP			1					
	➕ 🗑	Package Comment Sheet	Comment Page	1-1	1					
	➕ 🗑	TOC		2-2	1					
	➕ 🗑	Card	B01_A001	3-3	1	0				
	➕ 🗑	Card	B01_A002	4-4	1	0				

Unpacking results

Once the returned file has been unpacked, the user is automatically re-directed to the bulk match interface to complete processing.

Initially in the "To Match" tab, the "To Match," "Matched," and "Non-Card Segments" can be reviewed. The structure of the unpackaged documents can also be reviewed by clicking the "Unpacking Structure" option.

If a non-card segment should be moved into the "To Match" area, select it from the grid, click on "Actions" and choose "Match segment".

Once the review is complete, files can be assigned statuses and routing by switching to the "Apply Status & Routing" tab. Files can be processed either individually or in bulk (see article: Bulk Processing for Incoming Documents)

Final result

Once processing is complete, the unpacking process will result in the following:

1. The original package card, with a status/routing applied.

2. Individual "each" cards containing the applicable pages from the package. The individual "each" cards will have their own status/routing applied.

> For more examples and details about packages, see this video: Packing & Unpacking.
>
> Instructions for creating a package can be found in this article: Create Package of Cards.