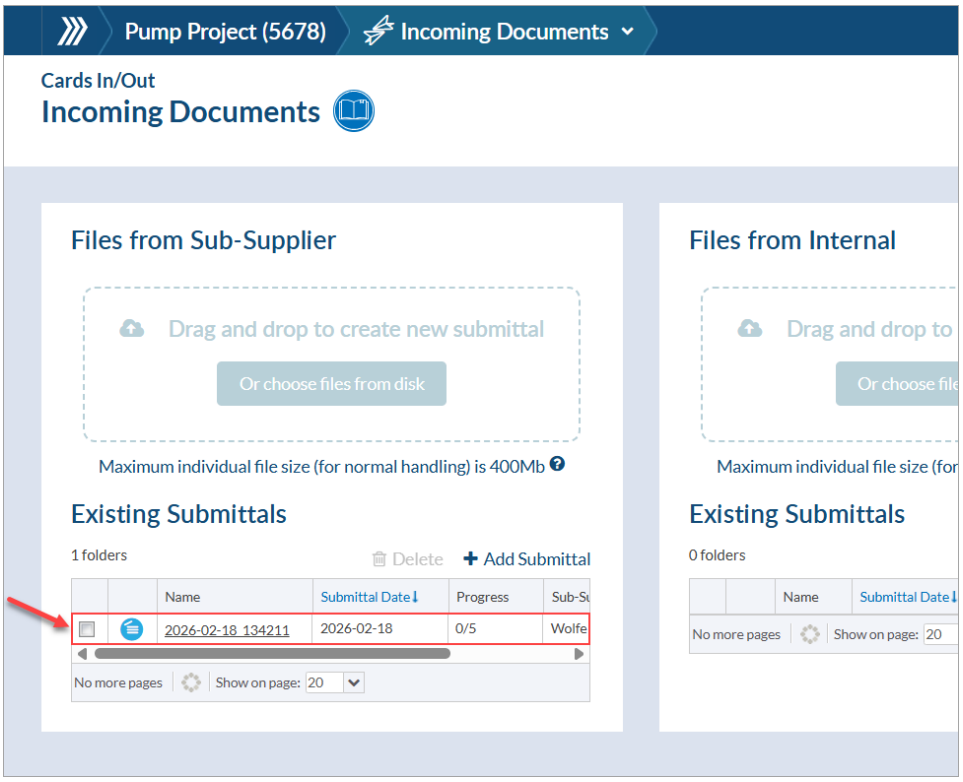
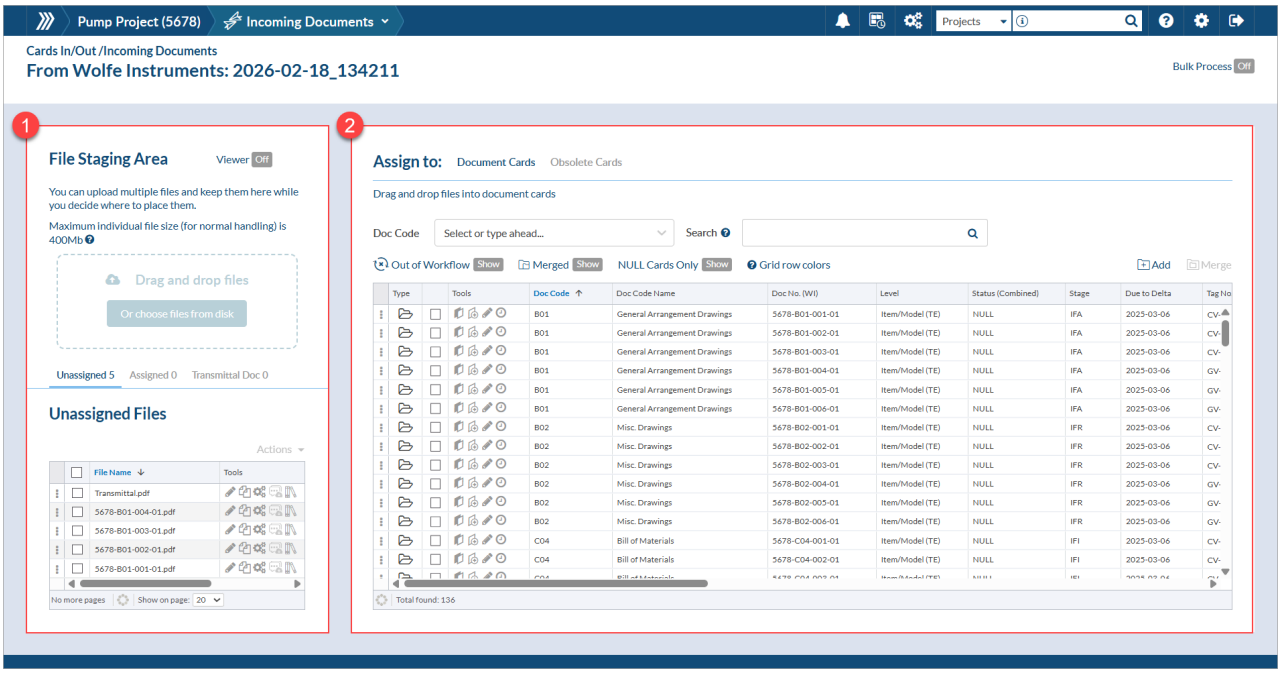
Assigning Files to Document Cards

09/10/2026 12:34 pm MDT

To begin assigning files to cards, navigate to **Project Menu > Cards In/Out > Incoming Documents** and click on the applicable submittal folder name.



There are two main areas: (1) the File Staging Area, and (2) the Card List.

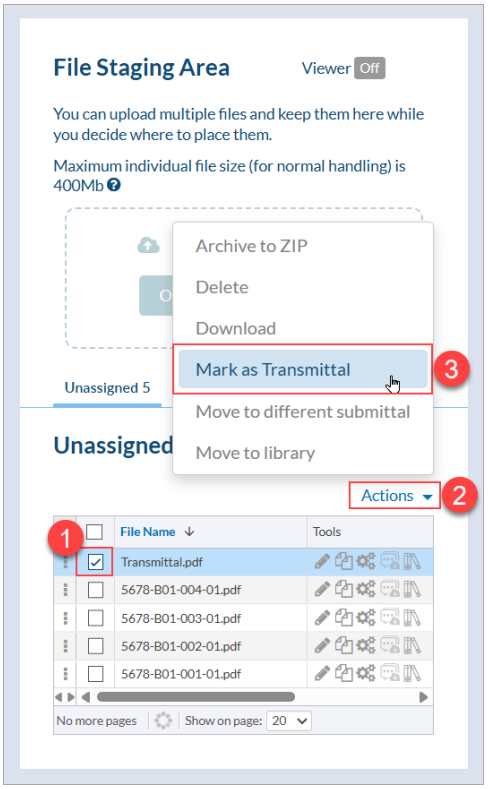


File Staging Area contains any files you uploaded on the previous step (Uploading Files). If you missed any files in the initial upload, you can add additional files using the drop zone.

The **Assign to** grid is a list of the cards on the project. You may choose to show/hide additional fields by hovering over a column header and choosing the columns to display.

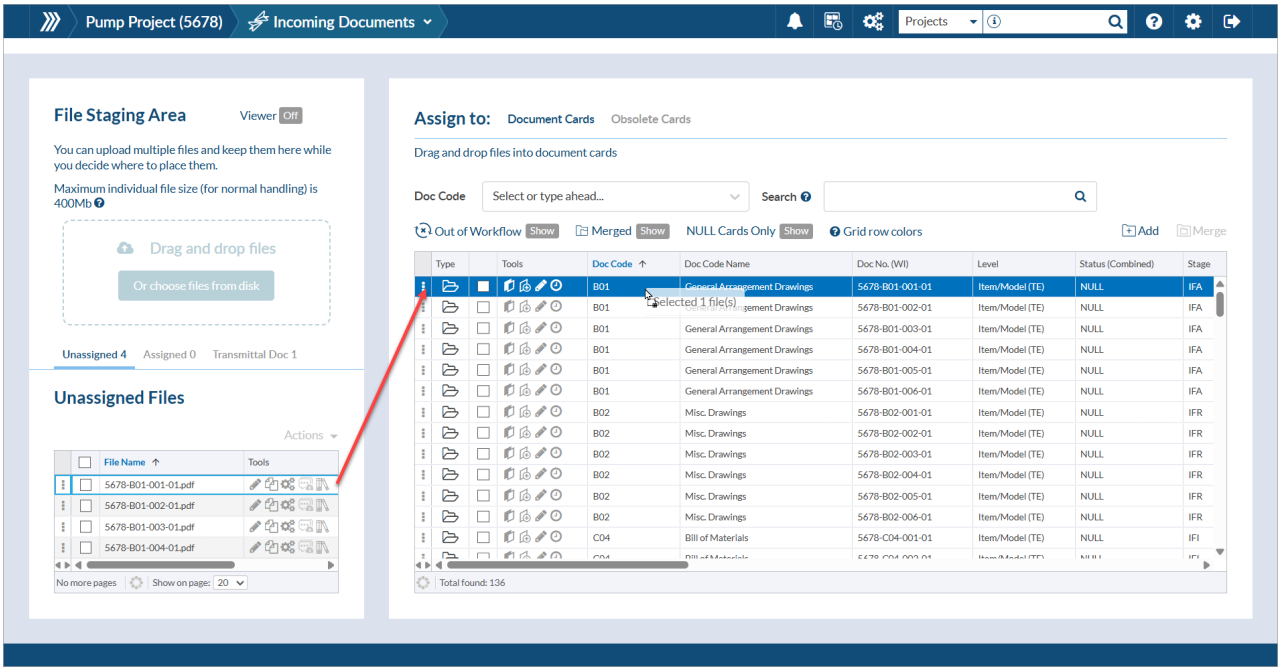
Assign transmittal file(s)

If the submittal includes a transmittal file(s), select the file(s) from the grid, expand the "Actions" drop-down, and choose "Mark as Transmittal." Doing so will categorize the file(s) correctly and remove them from the "Unassigned Files" grid.



Assign files to cards

To assign files to their corresponding cards, first locate the card in the grid. Once located, drag the file from "Unassigned Files" grid to the card in the "Assign to" grid.



Use the Doc Code Filter above the grid to trim down the cards populated in the grid. You can also use the keyword to trim down results further.

Once the file is dropped onto the card, the assignment (processing) form will appear on the right. In the form, you will see sections related to the workflow that is expected to occur:

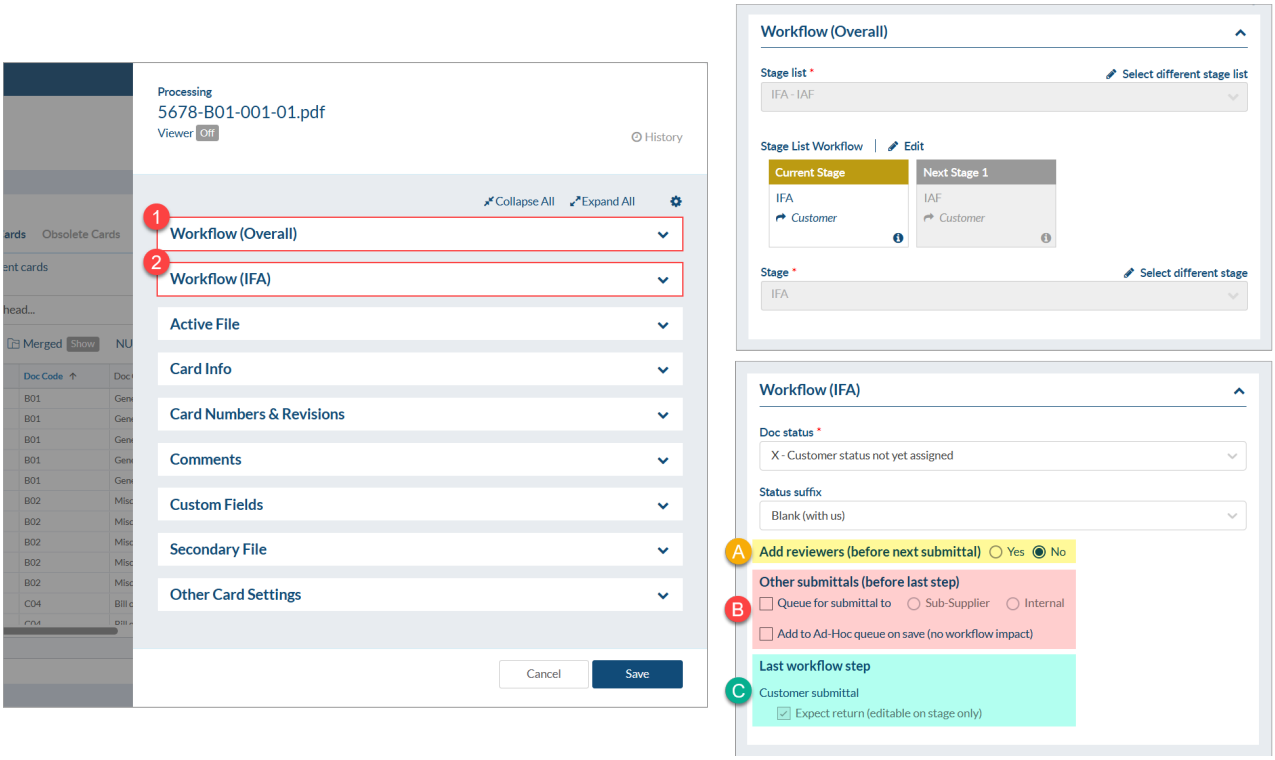
1. **Workflow (Overall):** Shows the full stage list workflow that is set on the card.

2. **Workflow ([*Stage Abbreviation*]):** Shows the workflow specific to the stage the card is currently in (organized in sequential order by steps):

    A. **Before next submittal:** Define internal users to review the file prior to submitting the file.

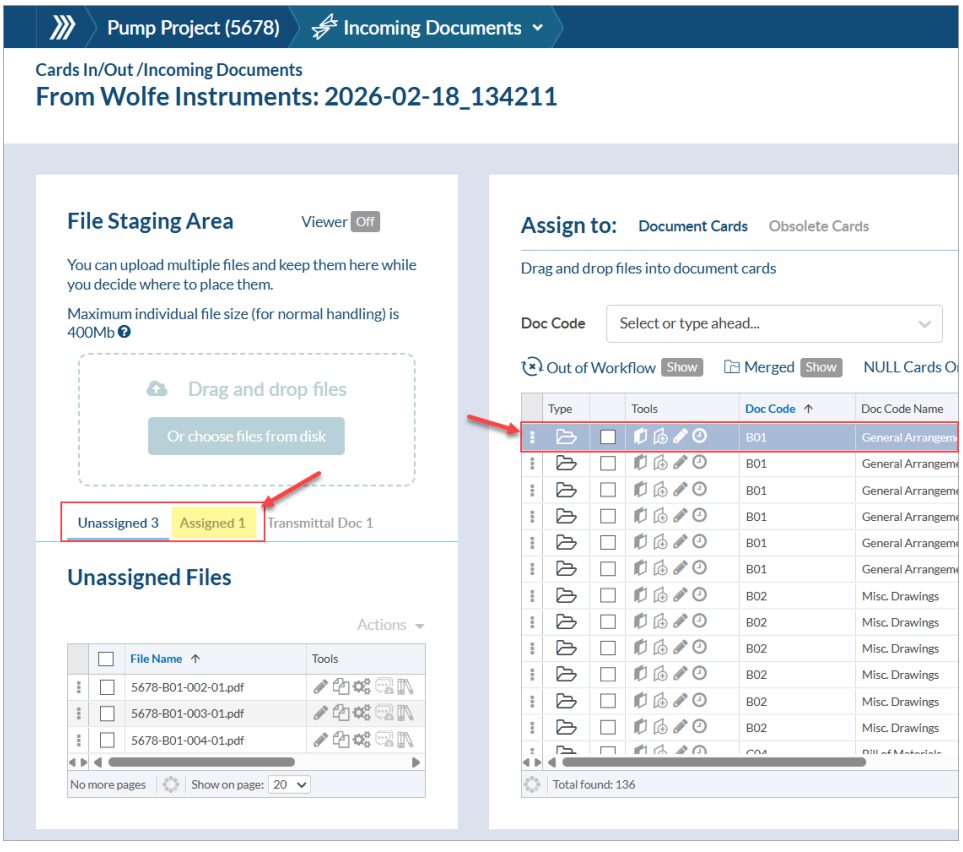
    B. **Before last step:** Define an alternate target to submit the file to (e.g., sub-supplier) before submitting to the stage target (e.g., customer). If the file is queued for submittal to an alternate target, the file will await return from this target prior to being queued for submittal to the stage target.

    C. **Last workflow step:** The target where the file will be queued for submittal (as defined by the stage list). This section will also indicate whether or not the file is expected to be returned from the stage target. If the stage includes an internal approval step, the "Workflow ([Stage Abbreviation])" section will be further organized by "Internal approval workflow" steps, and "Standard workflow" steps.



Other card information (e.g., document title, document numbers, revision number, submittal comments, etc.) can be adjusted as needed. When all the required information has been adjusted, click "Save" in the bottom right.

Once saved, the file will be moved from the "Unassigned" to "Assigned" tab in the File Staging Area and the card will be highlighted in blue (identifying it as an unlikely target for attaching a file).



Continue this process until all of the uploaded files have been assigned to their corresponding cards.

To learn how to assign files to cards in bulk, see this article: Bulk Processing for Incoming Documents.