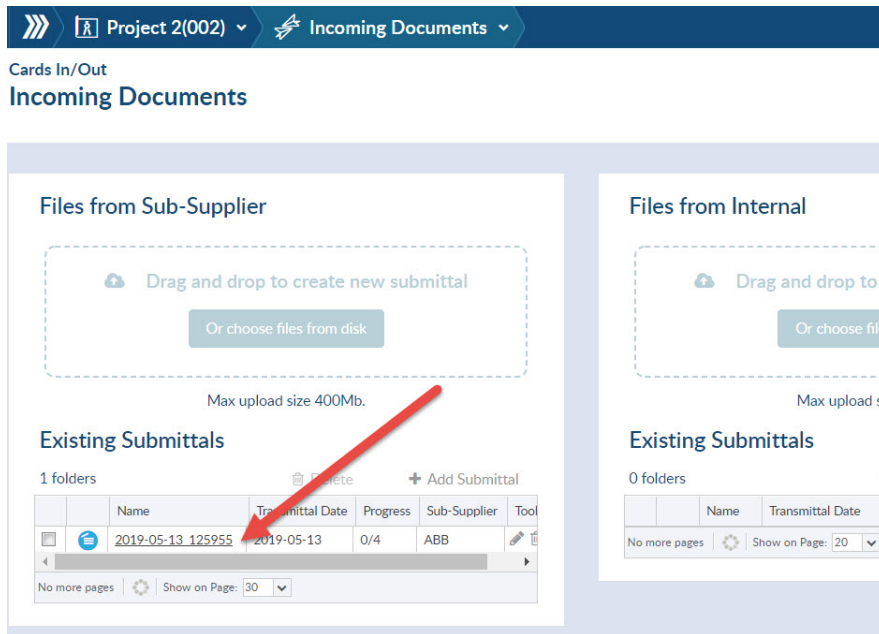# Assigning files to document cards
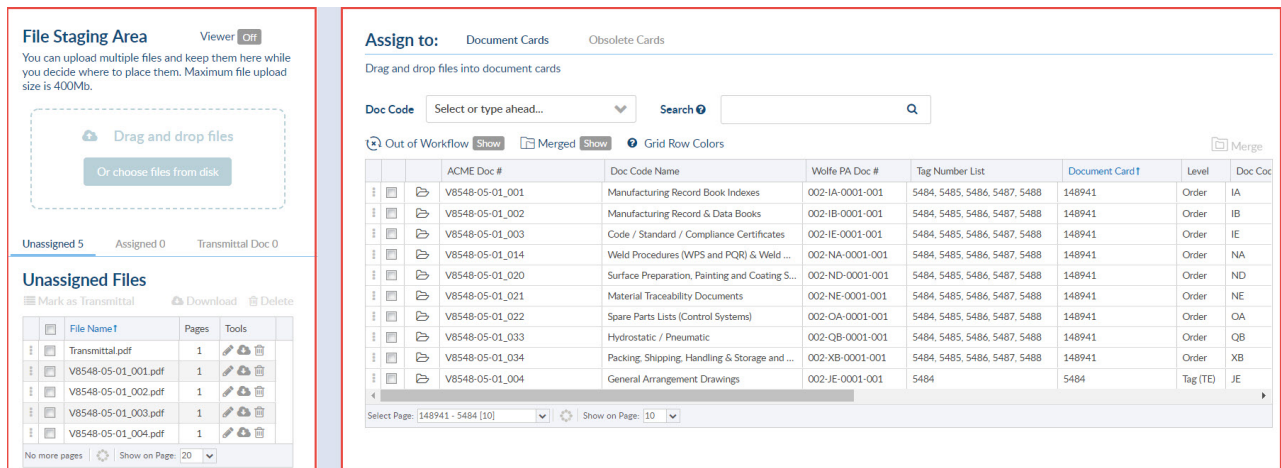
08/02/2024 3:15 pm MDT

To Get Here

1. *Incoming Documents Dashboard*

2. *Click on applicable submittal folder name*

Two main areas File Staging Area and the Document Card List

File Staging Area contains any files you uploaded on the previous step (Uploading Files) If you missed any files you can upload now

Match Files to Document Card is the project document card list. User may choose to enable/display custom card fields, as well as equipment line number lists as columns in the assign card grid.

First, assign any transmittal documents. This will file them correctly and get them out of the way. If your submittal did not include a transmittal document, no problem just move on.

Now, assign all of the uploaded documents to the correct cards.

1. Find the applicable document card in the grid then drag the file from Unassigned Files grid (left) to Assign to Doc Card grid (right)

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

4. Once dropped, the Status and Routing window will slide in. Complete the required information and click save.

Processing
V8548-05-01_001.pdf
Viewer `Off`   ⟳ History

New file to put in this document card

| V8548-05-01_001.pdf | ☁ |

Document Info

Linked Equipment Sub-Suppliers

| ABB |

Document Sub-Supplier Override

| - Select Sub-Supplier - | ⌄ |

Document Title

| Manufacturing Record Book Indexes |

Document Codes

Primary code

| IA |

Tags ⌃

Tag(s) List

| 5484, 5485, 5486, 5487, 5488 |

Pages in Document

[Cancel] [**Save**]

*Note once complete the file will move from the "Unassigned" to "Assigned" process tab.

File Staging Area   Viewer `Off`

You can upload multiple files and keep them here while you decide where to place them. Maximum file upload size is 400Mb.

☁ Drag and drop files

Or choose files from disk
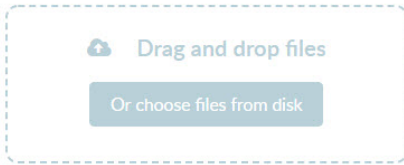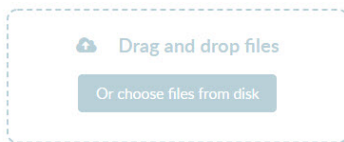
Unassigned 3   Assigned 1   Transmittal Doc 1

Unassigned Files

≣ Mark as Transmittal   ☁ Download   🗑 Delete

		File Name ↑	Pages	Tools
⋮	☐	V8548-05-01_002.pdf	1	✎ ☁ 🗑
⋮	☐	V8548-05-01_003.pdf	1	✎ ☁ 🗑
⋮	☐	V8548-05-01_004.pdf	1	✎ ☁ 🗑

No more pages   ⚙ Show on Page: 20 ⌄

Assign to: Document Cards   Obsolete Cards

Drag and drop files into document cards

Doc Code | Select or type ahead... ⌄ | Search ❓ | |

⟲ Out of Workflow `Show`   🗀 Merged `Show`   ❓ Grid Row Colors

			ACME Doc #	Doc Code Name
	☐	🗀	V8548-05-01_001	Manufacturing Record Book Indexes
⋮	☐	🗀	V8548-05-01_002	Manufacturing Record & Data Books
⋮	☐	🗀	V8548-05-01_003	Code / Standard / Compliance Certificates
⋮	☐	🗀	V8548-05-01_014	Weld Procedures (WPS and PQR) & Weld ...
⋮	☐	🗀	V8548-05-01_020	Surface Preparation, Painting and Coating S...
⋮	☐	🗀	V8548-05-01_021	Material Traceability Documents
⋮	☐	🗀	V8548-05-01_022	Spare Parts Lists (Control Systems)
⋮	☐	🗀	V8548-05-01_033	Hydrostatic / Pneumatic
⋮	☐	🗀	V8548-05-01_034	Packing, Shipping, Handling & Storage and ...
⋮	☐	🗀	V8548-05-01_004	General Arrangement Drawings

Select Page: 148941 - 5484 [10] ⌄ ⚙ Show on Page: 10 ⌄

5. Continue until you have assigned all files.

For information regarding assigning multiple files to a single card, see our article here.