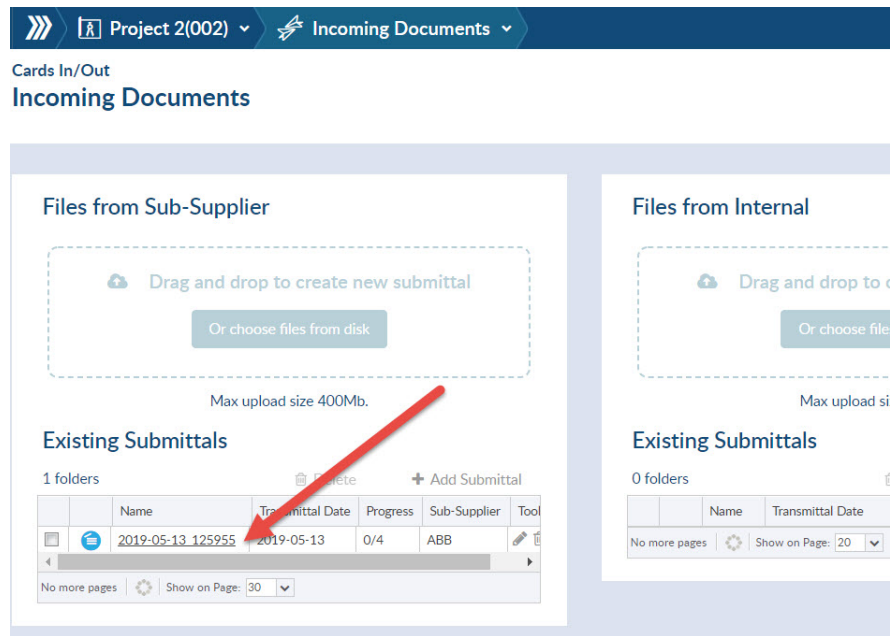


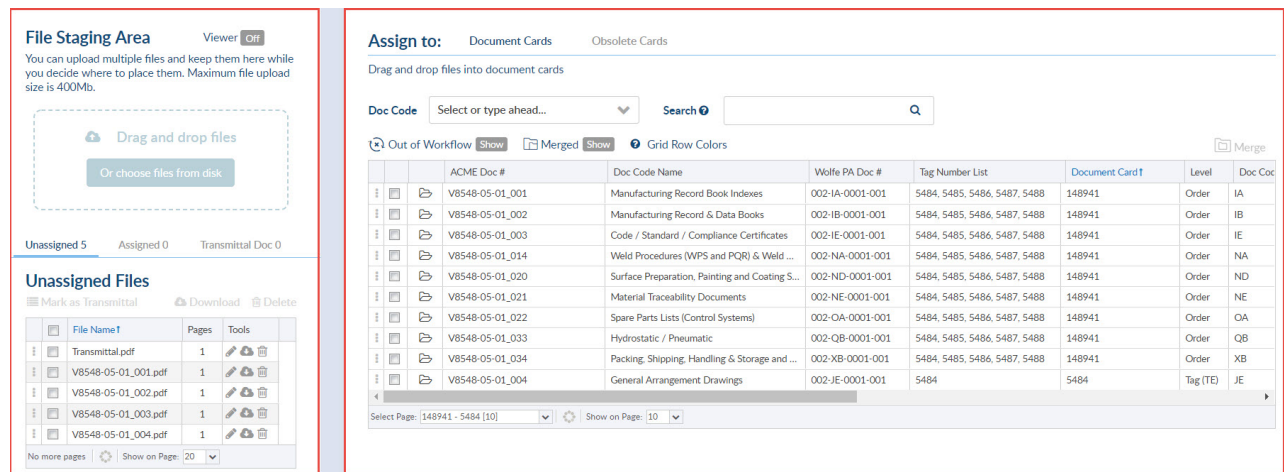
Assigning files to document cards

08/15/2025 8:43 am 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 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

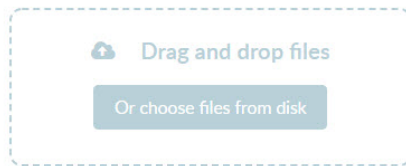
Match Files to Document Card is the project document card list. User may choose to enable/display custom card fields, as well as equipment line number lists as columns in the assign card grid.

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.

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.



Unassigned 5

Assigned 0

Transmittal Doc 0

Unassigned Files

Mark as Transmittal Download Delete

	File Name ↑	Pages	Tools
1	Transmittal.pdf	1	
	V8548-05-01_001.pdf	1	
	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

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

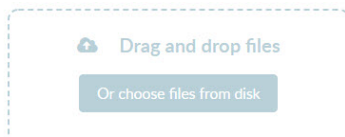
1. Find the applicable document card in the grid then drag the file from Unassigned Files grid (left) to Assign to Doc Card grid (right)

You can use the 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.

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.



Unassigned 4

Assigned 0

Transmittal Doc 1

Unassigned Files

Mark as Transmittal Download Delete

	File Name ↑	Pages	Tools
	V8548-05-01_001.pdf	1	
	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	Wolfe PA Doc #
	V8548-05-01_001	Manufacturing Record Book Indexes	002-IA-0001-001
	V8548-05-01_002	Manufacturing Record & Data Books	002-IB-0001-001
	V8548-05-01_003	Code / Standard / Compliance Certificates	002-IE-0001-001
	V8548-05-01_014	Weld Procedures (WPS and PQR) & Weld ...	002-NA-0001-001
	V8548-05-01_020	Surface Preparation, Painting and Coating S...	002-ND-0001-001
	V8548-05-01_021	Material Traceability Documents	002-NE-0001-001
	V8548-05-01_022	Spare Parts Lists (Control Systems)	002-OA-0001-001
	V8548-05-01_033	Hydrostatic / Pneumatic	002-QB-0001-001
	V8548-05-01_034	Packing, Shipping, Handling & Storage and ...	002-XB-0001-001
	V8548-05-01_004	General Arrangement Drawings	002-JE-0001-001

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

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

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

Continue this process until you have assigned all files.

For information regarding assigning multiple files to a single card, see our article [here](#).