

# Create Cards and Match

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The **Create Cards and Match** option is available for documents related to Major Tags. This allows users to create cards from information in the file name, skipping the step to add manual cards on the project's Card List.

When running bulk match, if there is not already an existing match for a card, it will show under the **Files that could not be matched** grid. To create manual cards for these:

1. Select the applicable files.
2. Click **Create Cards and Match** (2).

### Matching Uploaded Files to Document Cards

**Files that could not be matched** + Create Cards and Match

Unmatched files will remain in the staging area.

<span style="border: 1px solid red; border-radius: 50%; padding: 2px;">1</span> <input type="checkbox"/>	File Name	Pages	Error	Tools
<input checked="" type="checkbox"/>	1000-GAD-ABC.pdf	5		
<input type="checkbox"/>	1000-GAD-YYZ.pdf	5		
<input type="checkbox"/>	1000-MTR-0202-1.pdf	5		
<input type="checkbox"/>	1000-MTR-0202-2.pdf	5		
<input checked="" type="checkbox"/>	1001-GAD-ABC.pdf	5		

No more pages | Show on Page: 20



Don't see this option? Make sure Manual Cards and Major Tags are enabled on your project template, and that a Major Tag field has been created.

3. Select the applicable Major Tag(s). If you have documents related to different sets of major tags, go back and select only the documents in the first grouping, and import the groups one at a time.

4. Select the primary doc code.

### Matching Uploaded Files to Document Cards

**Files that could not be matched** + Create New Manual Cards

Unmatched files will remain in the staging area.

<input type="checkbox"/>	File Name	Pages
<input checked="" type="checkbox"/>	1000-GAD-ABC.pdf	5
<input type="checkbox"/>	1000-GAD-YYZ.pdf	5
<input type="checkbox"/>	1000-MTR-0202-1.pdf	5
<input type="checkbox"/>	1000-MTR-0202-2.pdf	5
<input checked="" type="checkbox"/>	1001-GAD-ABC.pdf	5

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#### Create New Manual Cards

**Major Tag(s)**

3 Major Tag \*  
MT-1 x

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**General**

4 Primary Code \*  
D03 - General Arrangement Drawings

Secondary Code(s)  
Select or type ahead...

5. Enter the pattern to be used for the **Document Title**. This field supports RegEx.

- To use the entire file name (without the extension) in a RegEx field, enter only the following text: `./`
- To output plain text at the beginning of the value, use the following format: `YourText<./>`
- To output plain text at the beginning of the value, use the following format: `<./>YourText`
- To output plain text in the middle of the value, use the following format: `<./>YourText<./>`



**RegEx (Regular Expression)** patterns are a standard type of coding used to parse text from the file name. They are powerful, but can be complex. Our Support team is happy to help, or you can check [here](#) for a quick reference guide.

6. Enter the pattern to be used for the **Supplier Document Number**. This field supports RegEx as well.

7. Save.

The screenshot shows a form titled "Create New Manual Cards". It has several sections: "Document Title" with a text input field containing "/\*" and a red circle with the number 5; "Status" section with "Stage List" and "Routing Scenario" dropdown menus; "Document Card Numbers" section with "Doc No. (AT)" text input field containing "/\*" and a red circle with the number 6, and "Rev # (Alpha)" text input field; and a bottom section with "Cancel" and "Save" buttons, where the "Save" button is highlighted with a red circle and the number 7.

8. When done using the bulk match process, go to the **Assign Status & Routing** tab and complete the process. See [this article](#) for steps.