

Create Cards and Match

11/18/2024 7:25 am MST

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 2 **+ Create Cards and Match**

Unmatched files will remain in the staging area.

1	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.

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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

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**. For instructions on formatting the pattern, see [Using Regular Expressions \(Create Cards and Match\)](#).

6. Enter the pattern to be used for the **Supplier Document Number**. This field uses regular expressions as well.

7. Save.

Create New Manual Cards

Document Title ⓘ *

/*/*

Status

Stage List

Select or type ahead...

Routing Scenario

Select or type ahead...

Document Card Numbers

Doc No. (AT) ⓘ *

/*/*

Rev # (Alpha) ⓘ

Cancel Save

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