

Assign Primary and Native Files in Bulk

10/14/2025 3:28 pm MDT

If receiving both primary and native files, the files can be assigned and processed in bulk using a "batching" method. Follow the steps below to get started:

1. Upload and match primary files

To start the process, upload the primary files to the appropriate drop zone (e.g., sub-supplier). Once the files are uploaded, run bulk matching to assign the files to their corresponding cards.

Matching Uploaded Files to Document Cards

File Staging Area Viewer: off

You can upload multiple files and keep them here while you decide where to place them.

Maximum individual file size (for normal handling) is 400Mb

Drag and drop files

Or choose files from disk

To Match 3 Matched 0 Transmittal Doc 0

To Match Files Run Matching

Tools File Name Pages

File Name	Card Name(Auto)	Doc No. (Chem C)	Doc No. (Omega)	Doc No. (End User - ABC)	Doc No. (Sub-Supplier)	Tools
B04-055-01.pdf	R02_A010	B04-010-01-Pump 3	B04-055-01			<input type="checkbox"/>
B04-056-01.pdf	R02_A011	B04-011-01-Pump 3	B04-056-01			<input type="checkbox"/>
B04-057-01.pdf	R02_A012	B04-012-01-Pump 4	B04-057-01			<input type="checkbox"/>

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Assign as native files to matched cards Cancel Accept Matches

2. Process primary files

Once the files have been matched, accept the matches and navigate to the "Apply Status & Routing" tab to begin processing. Process these files as-needed (either [individually](#) or [in bulk](#)).

Pump Project (1234) Incoming Documents

Cards In/Out/Incoming Documents
From Sub-Supplier 1: 2025-10-14_170318

To Match 0 **Apply Status & Routing 3**

Assign Status to Document Cards

Unprocessed 3 Processed 0

Unexpected Counts Only **Show** Grid row colors

Process Individually **Process In Bulk**

Tools	Rev # (Omega)	Status	Doc Code Name	Doc Code	Doc No. (Omega)	Level	Reference
<input checked="" type="checkbox"/>	0	NULL	Detailed/Descriptive Drawing	R02	B04-055-01	Tag No. (TE)	A010
<input checked="" type="checkbox"/>	0	NULL	Detailed/Descriptive Drawing	R02	B04-056-01	Tag No. (TE)	A011
<input checked="" type="checkbox"/>	0	NULL	Detailed/Descriptive Drawing	R02	B04-057-01	Tag No. (TE)	A012

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Save

Process Individually
Drag and drop document card(s) to start standard apply process

Process In Bulk
Drag and drop document card(s) to bulk apply status & routing



The primary files must first be processed **before** attempting to match the native files. If the primary files are matched but not processed, the native files will not successfully match to cards (due to unprocessed files already being matched to the cards).

3. Upload and match native files

Return to the "To Match" tab and upload the native files to the same submittal (via the File Staging Area). Once the files are uploaded, run bulk matching again by selecting the "Run Matching" button. Once the files have been matched, select the option to "Assign as native files to matched cards".

Pump Project (1234) Incoming Documents

Cards In/Out/Incoming Documents
From Sub-Supplier 1: 2025-10-14_170318

To Match 3 **Apply Status & Routing 0**

File Staging Area

Viewer **Off**

You can upload multiple files and keep them here while you decide where to place them.
Maximum individual file size (for normal handling) is 400Mb

Drag and drop files
Or choose files from disk

To Match 3 Matched 0 Transmittal Doc 0

To Match Files **Run Matching**

Tools File Name

<input type="checkbox"/>	B04-055-01_Native.pdf
<input type="checkbox"/>	B04-056-01_Native.pdf
<input type="checkbox"/>	B04-057-01_Native.pdf

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Matching Uploaded Files to Document Cards

Define split parameters:
Regular expression **File**
*Values must be inside quotation marks e.g. " " " "
*Separate multiple values by a comma e.g. " " " "

File only has the Reference? (like Tag No for Tag level)
Select code here **?**
☒ Main Code List ☐ Cross Reference (Internal) list
Select or type ahead...

Matching Files
Suggested file-document card matches will appear (with values highlighted) if the file name matches with the document card info.
Unmatched files will remain in the staging area.

File Name	Card Name(Auto)	Doc No. (Chem C)	Doc No. (Omega)	Doc No. (End User - ABC)	Doc No. (Sub-Supplier)
<input type="checkbox"/> B04-055-01_Native.pdf	R02_A010	B04-010-01-Pump 3	B04-055-01		
<input type="checkbox"/> B04-056-01_Native.pdf	R02_A011	B04-011-01-Pump 3 - TEST	B04-056-01		
<input type="checkbox"/> B04-057-01_Native.pdf	R02_A012	B04-012-01-Pump 4 - TEST	B04-057-01		

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Assign as native files to matched cards

Accept Matches

