Bulk Processing for Incoming Documents

11/14/2024 7:55 am MST

When receiving submittals with many files, users may want to use bulk processing to bring incoming documents into DocBoss. Instead of users individually dragging files into each card, DocBoss will attempt to automatically match each file to the appropriate card.

Prepare for bulk processing

Before uploading the files for bulk matching, users should:

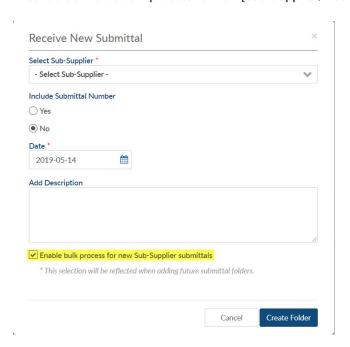
- 1. Ensure they know the return status of the files they are uploading (if applicable).
- 2. Confirm that the file names are formatted so DocBoss can link them to existing cards (see below for instructions).

Bulk matching process

1. Create submittal

Upload the files for bulk processing into DocBoss through the Incoming Documents screen.

Ensure that Enable bulk process for new [Sub-Supplier/Internal/Customer] submittals is checked.



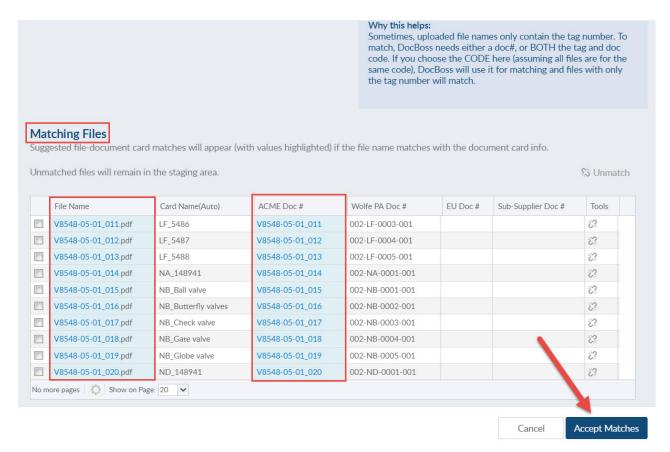
After completing the submittal details, select Create Folder.

2. Review and accept matches

DocBoss is breaking up the file name and looking for matches with existing document numbers. The results are shown in the pop-up below.

Matching Uploaded Files to Document Cards

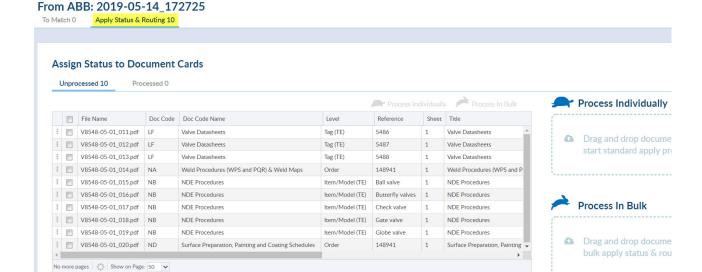




After reviewing the matches to ensure they are correct, select **Accept Matches** from the bottom right of the grid.

3. Apply status and routing

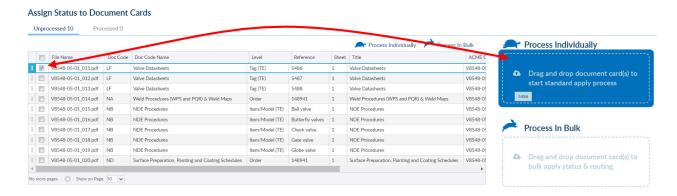
Cards In/Out / Incoming Documents



You have now matched the files to the cards, you still need to assign the status and define the routing. You have the option to Process Individually or Process In Bulk.

4a. Process individually

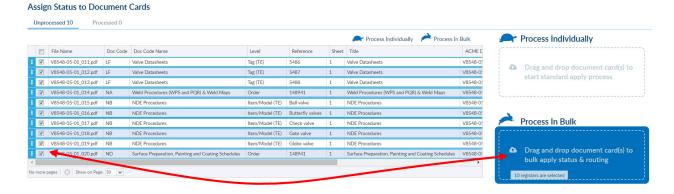
- 1. Select the applicable card from the drag & drop column
- 2. Drop in Process Individually



Complete the information for each document and save.

4b. Process In bulk

- 1. Select multiple cards from the drag & drop column
- 2. Drop in Process in Bulk



You can now assign the same status (and routing) to a group of cards all at once.

Once you have assigned details to all files the grid will be empty and the submittal will be marked complete.

Formatting file names for bulk processing

When trying to match your file with an existing card, DocBoss takes

- 1. Each segment of your file name (based on your split parameter)
- 2. The full file name

and compares it to

- 1. Each document number (internal, sub-supplier, customer, end user).
- 2. Card Name (Auto) which is always "code_reference" (e.g. "D01_TT-101")
- 3. The reference field **BUT user MUST select the doc code in the match box (if more than one code uses the same reference).

Bulk process native files

To bulk process native/secondary files, match the files as usual, and then select "Assign as Native Files to Matched Cards".

