Bulk Processing for Incoming Documents

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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 can 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.

Select Sub-Supplier *		
- Select Sub-Supplie	r-	~
Include Submittal Nur	nber	
🔾 Yes		
No		
Date *		
2019-05-14	m	
Add Description		
Add Description		
Add Description	s for new Sub-Supplier submittals	
Add Description Enable bulk proces * This selection will i	<mark>s for new Sub-Supplier submittals</mark> be reflected when adding future submittal folders.	,
Enable bulk proces * This selection will	<mark>s for new Sub-Supplier submittals</mark> be reflected when adding future submittal folders.	

After completing the submittal details, select Create Folder.

2. Review and accept matches

DocBoss will parse the file name and look for matches with existing document numbers. The results are shown in the pop-up below.

Matching Uploaded Files to Document Cards

Why this helps:

Sometimes, uploaded file names only contain the tag number. To match, DocBoss needs either a doc#, or BOTH the tag and doc code. If you choose the CODE here (assuming all files are for the same code), DocBoss will use it for matching and files with only the tag number will match.

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)	ACME Doc #	Wolfe PA Doc #	EU Doc #	Sub-Supplier Doc #	Tools
100	V8548-05-01_011.pdf	LF_5486	V8548-05-01_011	002-LF-0003-001			52
	V8548-05-01_012.pdf	LF_5487	V8548-05-01_012	002-LF-0004-001			53
1	V8548-05-01_013.pdf	LF_5488	V8548-05-01_013	002-LF-0005-001			53
-	V8548-05-01_014.pdf	NA_148941	V8548-05-01_014	002-NA-0001-001			53
	V8548-05-01_015.pdf	NB_Ball valve	V8548-05-01_015	002-NB-0001-001			52
	V8548-05-01_016.pdf	NB_Butterfly valves	V8548-05-01_016	002-NB-0002-001			52
	V8548-05-01_017.pdf	NB_Check valve	V8548-05-01_017	002-NB-0003-001			53
F	V8548-05-01_018.pdf	NB_Gate valve	V8548-05-01_018	002-NB-0004-001			53
1	V8548-05-01_019.pdf	NB_Globe valve	V8548-05-01_019	002-NB-0005-001			22
[]	V8548-05-01_020.pdf	ND_148941	V8548-05-01_020	002-ND-0001-001			<u>~</u>
No m	ore pages 🛛 🔅 Show on Page	20 🗸					
						Cancel	Accent Matche

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 From ABB: 2019-05-14_172725 To Match 0 Apply Status & Routing 10

Assign Status to Document Cards

Processed 0

Unprocessed 10

	File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title	1	
	V8548-05-01_011.pdf	LF	Valve Datasheets	Tag (TE)	5486	1	Valve Datasheets		Description
	V8548-05-01_012.pdf	LF	Valve Datasheets	Tag (TE)	5487	1	Valve Datasheets		Drag and drop docume
	V8548-05-01_013.pdf	LF	Valve Datasheets	Tag (TE)	5488	1	Valve Datasheets		start stariuaru appry pri
	V8548-05-01_014.pdf	NA	Weld Procedures (WPS and PQR) & Weld Maps	Order	148941	1	Weld Procedures (WPS and P		
	V8548-05-01_015.pdf	NB	NDE Procedures	Item/Model (TE)	Ball valve	1	NDE Procedures		
	V8548-05-01_016.pdf	NB	NDE Procedures	Item/Model (TE)	Butterfly valves	1	NDE Procedures	-	
	V8548-05-01_017.pdf	NB	NDE Procedures	Item/Model (TE)	Check valve	1	NDE Procedures		Process In Bulk
	V8548-05-01_018.pdf	NB	NDE Procedures	Item/Model (TE)	Gate valve	1	NDE Procedures	1	
	V8548-05-01_019.pdf	NB	NDE Procedures	Item/Model (TE)	Globe valve	1	NDE Procedures		127 R. B. C.
100	V8548-05-01_020.pdf	ND	Surface Preparation, Painting and Coating Schedules	Order	148941	1	Surface Preparation, Painting 👻	6	Drag and drop docume

0

🖇 Unmatch

Once the files have been matched to the appropriate cards, they will need to be assigned statuses and routing will need to be defined. Processing the files can either be done (a) individually OR (b) in bulk.

4a. Process individually

- 1. Select the applicable card from the grid
- 2. Drag and drop the cards into the "Process Individually" box

Assign Status to Document Cards

							Process Individually Process In	Bulk	Process Individually
	File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title	ACME E	*
1	V8548-05-01_011.pdf	LF	Valve Datasheets	Tag (TE)	5486	1	Valve Datasheets	V8548-0	
	V8548-05-01_012.pdf	LF	Valve Datasheets	Tag (TE)	5487	1	Valve Datasheets	V8548-0	etart standard apply process
	V8548-05-01_013.pdf	LF	Valve Datasheets	Tag (TE)	5488	1	Valve Datasheets	V8548-0	
	V8548-05-01_014.pdf	NA	Weld Procedures (WPS and PQR) & Weld Maps	Order	148941	1	Weld Procedures (WPS and PQR) & Weld Maps	V8548-0	5486
	V8548-05-01_015.pdf	NB	NDE Procedures	Item/Model (TE)	Ball valve	1	NDE Procedures	V8548-0	
	V8548-05-01_016.pdf	NB	NDE Procedures	Item/Model (TE)	Butterfly valves	1	NDE Procedures	V8548-0	4
	V8548-05-01_017.pdf	NB	NDE Procedures	Item/Model (TE)	Check valve	1	NDE Procedures	V8548-0!	Process In Bulk
	V8548-05-01_018.pdf	NB	NDE Procedures	Item/Model (TE)	Gate valve	1	NDE Procedures	V8548-0	
	V8548-05-01_019.pdf	NB	NDE Procedures	Item/Model (TE)	Globe valve	1	NDE Procedures	V8548-0	
	V8548-05-01_020.pdf	ND	Surface Preparation, Painting and Coating Schedules	Order	148941	1	Surface Preparation, Painting and Coating Schedules	V8548-0	Drag and drop document card(s) to
								•	bulk apply status & routing

Fill out the necessary information for each document and save.

4b. Process In bulk

Assign Status to Document Cards

- 1. Select multiple cards from the grid
- 2. Drag and drop the cards into the "Process In Bulk" box

							🔎 🗲 Process Individually 🛛 📌 Process In	Bulk	-	Process Individually
	File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title	ACME E		
V	V8548-05-01_011.pdf	LF	Valve Datasheets	Tag (TE)	5486	1	Valve Datasheets	V8548-0		5
7	V8548-05-01_012.pdf	LF	Valve Datasheets	Tag (TE)	5487	1	Valve Datasheets	V8548-0!		Drag and drop document card(s) to
1	V8548-05-01_013.pdf	LF	Valve Datasheets	Tag (TE)	5488	1	Valve Datasheets	V8548-05		start standard apply process
V	V8548-05-01_014.pdf	NA	Weld Procedures (WPS and PQR) & Weld Maps	Order	148941	1	Weld Procedures (WPS and PQR) & Weld Maps	V8548-0		
V	V8548-05-01_015.pdf	NB	NDE Procedures	Item/Model (TE)	Ball valve	1	NDE Procedures	V8548-05		
1	V8548-05-01_016.pdf	NB	NDE Procedures	Item/Model (TE)	Butterfly valves	1	NDE Procedures	V8548-0		
v	V8548-05-01_017.pdf	NB	NDE Procedures	Item/Model (TE)	Check valve	1	NDE Procedures	V8548-0!		Process In Bulk
1	V8548-05-01_018.pdf	NB	NDE Procedures	Item/Model (TE)	Gate valve	1	NDE Procedures	V8548-0	(
1	V8548-05-01_019.pdf	NB	NDE Procedures	Item/Model (TE)	Globe valve	1	NDE Procedures	V8548-0		
1	19.05-01_020.pdf	ND	Surface Preparation, Painting and Coating Schedules	Order	148941	1	Surface Preparation, Painting and Coating Schedules	V8548-0!		Drag and drop document card(s) t

The same status (and routing) can be applied to the selected group of cards simultaneously.

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

If processing documents that are returned with a complete status, a new stage list can be started. This is useful in cases where there are no further stages in the current stage list, but additional workflow is required after stage completion.

	Pump 4.pdf				
Reference	B03-047-01				
Doc No. (Chem C)	B03-008-01-				
Doc No. (Omega)	B03-047-01				
Doc No. (End User)					
Doc No. (Sub-Supplier)					
Cile Name	Dump 5 add				
Peference	R02-049-01				
Doc No. (Chem C)	B03-009-01-				
Doc No. (Omega)	B03-048-01				
Doc No. (End User)					
Doc No. (Sub-Supplier)					
Force exceptional han Status & Routing	dling		_		
Force exceptional han Status & Routing Doc Status *	dling	v	-		
Force exceptional han Status & Routing Doc Status * 1- Approved	dling	×	-		
Force exceptional han Status & Routing Doc Status 1 - Approved Start a different stage	dling list (on save)	v.	2		

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".

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 Doc No. (Delta) Card Name(Auto) Doc No. (End User) Doc No. (WI) Doc No. (Sub-Supplier) Tools 1234-035.xlsx 1234-035 M08_VL-4099 S210715-M08-009-01 2 1234-036.xlsx M17_VL-4099 S210715-M17-005-01 1234-036 22 No more pages 🛛 🔅 Show on Page: 20 🗸 Accept Matches Assign as native files to matched cards Cancel