

Bulk Processing for Incoming Documents

02/20/2026 5:04 pm 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 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.

Receive New Submittal

Select Sub-Supplier *

- Select Sub-Supplier -

Include Submittal Number

Yes

No

Date *

2019-05-14

Add Description

Enable bulk process for new Sub-Supplier submittals

* This selection will be reflected when adding future submittal folders.

Cancel Create Folder

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.

Unmatch

	File Name	Card Name(Auto)	ACME Doc #	Wolfe PA Doc #	EU Doc #	Sub-Supplier Doc #	Tools
<input type="checkbox"/>	V8548-05-01_011.pdf	LF_5486	V8548-05-01_011	002-LF-0003-001			
<input type="checkbox"/>	V8548-05-01_012.pdf	LF_5487	V8548-05-01_012	002-LF-0004-001			
<input type="checkbox"/>	V8548-05-01_013.pdf	LF_5488	V8548-05-01_013	002-LF-0005-001			
<input type="checkbox"/>	V8548-05-01_014.pdf	NA_148941	V8548-05-01_014	002-NA-0001-001			
<input type="checkbox"/>	V8548-05-01_015.pdf	NB_Ball valve	V8548-05-01_015	002-NB-0001-001			
<input type="checkbox"/>	V8548-05-01_016.pdf	NB_Butterfly valves	V8548-05-01_016	002-NB-0002-001			
<input type="checkbox"/>	V8548-05-01_017.pdf	NB_Check valve	V8548-05-01_017	002-NB-0003-001			
<input type="checkbox"/>	V8548-05-01_018.pdf	NB_Gate valve	V8548-05-01_018	002-NB-0004-001			
<input type="checkbox"/>	V8548-05-01_019.pdf	NB_Globe valve	V8548-05-01_019	002-NB-0005-001			
<input type="checkbox"/>	V8548-05-01_020.pdf	ND_148941	V8548-05-01_020	002-ND-0001-001			

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Cancel **Accept Matches**

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

Unprocessed 10 Processed 0

Process Individually Process In Bulk

	File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title
<input type="checkbox"/>	V8548-05-01_011.pdf	LF	Valve Datasheets	Tag (TE)	5486	1	Valve Datasheets
<input type="checkbox"/>	V8548-05-01_012.pdf	LF	Valve Datasheets	Tag (TE)	5487	1	Valve Datasheets
<input type="checkbox"/>	V8548-05-01_013.pdf	LF	Valve Datasheets	Tag (TE)	5488	1	Valve Datasheets
<input type="checkbox"/>	V8548-05-01_014.pdf	NA	Weld Procedures (WPS and PQR) & Weld Maps	Order	148941	1	Weld Procedures (WPS and P
<input type="checkbox"/>	V8548-05-01_015.pdf	NB	NDE Procedures	Item/Model (TE)	Ball valve	1	NDE Procedures
<input type="checkbox"/>	V8548-05-01_016.pdf	NB	NDE Procedures	Item/Model (TE)	Butterfly valves	1	NDE Procedures
<input type="checkbox"/>	V8548-05-01_017.pdf	NB	NDE Procedures	Item/Model (TE)	Check valve	1	NDE Procedures
<input type="checkbox"/>	V8548-05-01_018.pdf	NB	NDE Procedures	Item/Model (TE)	Gate valve	1	NDE Procedures
<input type="checkbox"/>	V8548-05-01_019.pdf	NB	NDE Procedures	Item/Model (TE)	Globe valve	1	NDE Procedures
<input type="checkbox"/>	V8548-05-01_020.pdf	ND	Surface Preparation, Painting and Coating Schedules	Order	148941	1	Surface Preparation, Painting

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Process Individually

Drag and drop docume start standard apply pr

Process In Bulk

Drag and drop docume bulk apply status & rou

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

Unprocessed 10 Processed 0

<input type="checkbox"/>	File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title	ACME E
<input checked="" type="checkbox"/>	V8548-05-01_011.pdf	LF	Valve Datasheets	Tag (TE)	5486	1	Valve Datasheets	V8548-05-01_011
<input checked="" type="checkbox"/>	V8548-05-01_012.pdf	LF	Valve Datasheets	Tag (TE)	5487	1	Valve Datasheets	V8548-05-01_012
<input checked="" type="checkbox"/>	V8548-05-01_013.pdf	LF	Valve Datasheets	Tag (TE)	5488	1	Valve Datasheets	V8548-05-01_013
<input checked="" type="checkbox"/>	V8548-05-01_014.pdf	NA	Weld Procedures (WPS and PQR) & Weld Maps	Order	148941	1	Weld Procedures (WPS and PQR) & Weld Maps	V8548-05-01_014
<input checked="" type="checkbox"/>	V8548-05-01_015.pdf	NB	NDE Procedures	Item/Model (TE)	Ball valve	1	NDE Procedures	V8548-05-01_015
<input checked="" type="checkbox"/>	V8548-05-01_016.pdf	NB	NDE Procedures	Item/Model (TE)	Butterfly valves	1	NDE Procedures	V8548-05-01_016
<input checked="" type="checkbox"/>	V8548-05-01_017.pdf	NB	NDE Procedures	Item/Model (TE)	Check valve	1	NDE Procedures	V8548-05-01_017
<input checked="" type="checkbox"/>	V8548-05-01_018.pdf	NB	NDE Procedures	Item/Model (TE)	Gate valve	1	NDE Procedures	V8548-05-01_018
<input checked="" type="checkbox"/>	V8548-05-01_019.pdf	NB	NDE Procedures	Item/Model (TE)	Globe valve	1	NDE Procedures	V8548-05-01_019
<input checked="" type="checkbox"/>	V8548-05-01_020.pdf	ND	Surface Preparation, Painting and Coating Schedules	Order	148941	1	Surface Preparation, Painting and Coating Schedules	V8548-05-01_020

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Process Individually

Process In Bulk

Process Individually

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

5486

Process In Bulk

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

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

Assign Status to Document Cards

Unprocessed 10 Processed 0

<input type="checkbox"/>	File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title	ACME E
<input checked="" type="checkbox"/>	V8548-05-01_011.pdf	LF	Valve Datasheets	Tag (TE)	5486	1	Valve Datasheets	V8548-05-01_011
<input checked="" type="checkbox"/>	V8548-05-01_012.pdf	LF	Valve Datasheets	Tag (TE)	5487	1	Valve Datasheets	V8548-05-01_012
<input checked="" type="checkbox"/>	V8548-05-01_013.pdf	LF	Valve Datasheets	Tag (TE)	5488	1	Valve Datasheets	V8548-05-01_013
<input checked="" type="checkbox"/>	V8548-05-01_014.pdf	NA	Weld Procedures (WPS and PQR) & Weld Maps	Order	148941	1	Weld Procedures (WPS and PQR) & Weld Maps	V8548-05-01_014
<input checked="" type="checkbox"/>	V8548-05-01_015.pdf	NB	NDE Procedures	Item/Model (TE)	Ball valve	1	NDE Procedures	V8548-05-01_015
<input checked="" type="checkbox"/>	V8548-05-01_016.pdf	NB	NDE Procedures	Item/Model (TE)	Butterfly valves	1	NDE Procedures	V8548-05-01_016
<input checked="" type="checkbox"/>	V8548-05-01_017.pdf	NB	NDE Procedures	Item/Model (TE)	Check valve	1	NDE Procedures	V8548-05-01_017
<input checked="" type="checkbox"/>	V8548-05-01_018.pdf	NB	NDE Procedures	Item/Model (TE)	Gate valve	1	NDE Procedures	V8548-05-01_018
<input checked="" type="checkbox"/>	V8548-05-01_019.pdf	NB	NDE Procedures	Item/Model (TE)	Globe valve	1	NDE Procedures	V8548-05-01_019
<input checked="" type="checkbox"/>	V8548-05-01_020.pdf	ND	Surface Preparation, Painting and Coating Schedules	Order	148941	1	Surface Preparation, Painting and Coating Schedules	V8548-05-01_020

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Process Individually

Process In Bulk

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

10 registers are selected

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.

Bulk process - additional details:

1. 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.

Set Status And Routing

File Name: 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):

File Name: Pump 5.pdf
 Reference: B03-048-01
 Doc No. (Chem C): B03-009-01-
 Doc No. (Omega): B03-048-01
 Doc No. (End User):
 Doc No. (Sub-Supplier):

Force exceptional handling

Status & Routing

Doc Status *
 1 - Approved

Start a different stage list (on save)
 Select or type ahead...

Add to Ad-Hoc

- If documents have undergone internal approval and the IA process needs to be restarted, check the "Restart IA process" box on the applicable documents before bulk processing. This check box will only be available for cards which already have an approved IA status applied.

To Match 0 **Apply Status & Routing 1**

Assign Status to Document Cards

Unprocessed 1 Processed 4

Unexpected Counts Only Show Grid row colors Process Individually Process In Bulk

Tools	<input type="checkbox"/> Restart IA process	Doc Code ↑	Doc Code Name	Incoming Page Count	Expected Pages	Expect
	<input checked="" type="checkbox"/>	K11	Registration of Fittings, Valves and Vessels(CRN)	2		0

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Example: A set of cards underwent internal approval (all receiving an "approved" status) and were submitted to the source with no return expected, resulting in status Z.{A}. The documents were **unexpectedly returned**, and a new internal approval cycle needs to be started to prompt the review of these documents. The documents are brought in via Incoming Documents and are bulk matched to the applicable cards. The box to "Restart IA process" is checked for each card, and the cards are then processed in bulk.

**Note: In this case, because the cards were auto-completed in relation to the internal approval process, DocBoss expects that internal approval should be restarted upon return. As such, a pop-up will appear to remind you to check the "Restart IA process" box before bulk processing (if/when there are cards in Z{A} status that do not have this box checked).*

Assign Status to Document Cards

Unprocessed 1 Processed 0

Unexpected Counts Only Show Grid row colors Process Individually Process In Bulk

Tools	<input type="checkbox"/> Restart IA process	Status	Doc Code
	<input checked="" type="checkbox"/>	Z{A}	K11

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Confirmation ×

The step before these cards were auto-completed was related to internal approval. Often when users bring new files into a card after such a step, they mean to restart IA. BUT - the "restart IA" checkbox has not been selected on any/all of the applicable cards. Do you want to go back so you can select the "restart IA" checkbox?

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. Unmatch

	File Name	Doc No. (Delta)	Card Name(Auto)	Doc No. (WI)	Doc No. (End User)	Doc No. (Sub-Supplier)	Tools	
<input type="checkbox"/>	1234-035.xlsx	1234-035	M08_VL-4099	S210715-M08-009-01				
<input type="checkbox"/>	1234-036.xlsx	1234-036	M17_VL-4099	S210715-M17-005-01				

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If looking to process both primary and native files in bulk, see the following article: [Assign Primary and Native Files in Bulk](#).