

Bulk Processing for Incoming Documents

09/16/2024 2:36 pm MDT

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.

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 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



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			

No more pages Show on Page: 20

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

<input type="checkbox"/>	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

No more pages Show on Page: 50

Process Individually

Drag and drop docume start standard apply pr

Process In Bulk

Drag and drop docume bulk apply status & rou

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

Assign Status to Document Cards

Unprocessed 10 Processed 0

Process Individually Process In Bulk

<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

No more pages Show on Page: 50

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

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

Assign Status to Document Cards

Unprocessed 10 Processed 0

Process Individually Process In Bulk

<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

No more pages Show on Page: 50

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

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".

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				

No more pages | Show on Page: 20