

# Matching Tag Numbers in Bulk Process

09/16/2024 1:50 pm MDT

If the file numbers are same as the tag numbers they could be easily matched in bulk process by DocBoss with the auto-created card number which automatically contains the tag number.

Project 1(001) | Incoming Documents | From Krohne: 2019-05-06\_17... | 0 Projects

Cards In/Out / Incoming Documents  
From Krohne: 2019-05-06\_172536 | Bulk Process On

To Match 50 | Matched 0 | Transmittal Doc 0

**File Staging Area** | Viewer Off  
You can upload multiple files and keep them here while you decide where to place them. Maximum file upload size is 400Mb.

Drag and drop files  
Or choose files from disk

To Match Files | Run Matching  
Mark as Transmittal | Download | Delete

Doc Code	Doc Code Name	Wolfe PA Doc #	ACME Doc #	Level	Status (Com)
SP-101-1892	DETAIL DWG			Tag (TE)	NULL
SP-101-1893	DETAIL DWG			Tag (TE)	NULL
SP-101-1894	DETAIL DWG			Tag (TE)	NULL
SP-101-1895	DETAIL DWG			Tag (TE)	NULL
SP-101-1896	DETAIL DWG			Tag (TE)	NULL
SP-101-1897	DETAIL DWG			Tag (TE)	NULL
SP-101-1898	DETAIL DWG			Tag (TE)	NULL
SP-101-1899	DETAIL DWG			Tag (TE)	NULL
SP-101-1900	DETAIL DWG			Tag (TE)	NULL
SP-101-1901	DETAIL DWG			Tag (TE)	NULL
SP-101-1902	DETAIL DWG			Tag (TE)	NULL
SP-101-1903	DETAIL DWG			Tag (TE)	NULL
SP-101-1904	DETAIL DWG			Tag (TE)	NULL
SP-101-1905	DETAIL DWG			Tag (TE)	NULL

But what if you have to include the same tags for two documents with the same document code. This could be the example of documents that you have to provide in English language and Russian language.

Project 1(001) | Code List (Requirements) | 0 Projects

Cards  
Code List (Requirements)

Grid Rows Colors | Save

Select	Doc Code	Doc Code Name	Type	Tools	Stage List	Level	Delivery Days	Reference Date	Eq#	Included In
<input type="checkbox"/>	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Generated (Sub-Supplier)		IFR/IFA/IFC	Tag (TE)	10	AO	Tag	--
<input type="checkbox"/>	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - RU	Generated (Sub-Supplier)		IFR/IFA/IFC	Tag (TE)	10	AO	Tag	--
<input type="checkbox"/>	PROCEDURE	CALIBRATION PROCEDURE - EN	Generated (Sub-Supplier)		IFI	Order	10	AO	Tag	--
<input type="checkbox"/>	PROCEDURE	CALIBRATION PROCEDURE - RU	Generated (Sub-Supplier)		IFI	Order	10	AO	Tag	--
<input type="checkbox"/>	CED	CERTIFICATION DOSSIER - EN	Compilation		IFI	Order	10	AO	Tag	--
<input type="checkbox"/>	CED	CERTIFICATION DOSSIER - RU	Compilation		IFI	Order	10	AO	Tag	--
<input type="checkbox"/>	LIST	CERTIFICATION DOSSIER INDEX - EN	Compilation		IFI	Order	10	AO	Tag	--
<input type="checkbox"/>	LIST	CERTIFICATION DOSSIER INDEX - RU	Compilation		IFI	Order	10	AO	Tag	--

If we run the bulk matching process, this will give us an error because the system finds two documents where to assign the files and can't difference if the files belongs to the English version or to the Russian version.

## Matching Uploaded Files to Document Cards



### Files that could not be matched

Unmatched files will remain in the staging area.

File Name	Pages	Error	Tools
SP-101-1892.pdf	27	⚠	✎
SP-101-1893.pdf	2	⚠	✎
SP-101-1894.pdf	1	⚠	✎
SP-101-1895.pdf	1	⚠	✎
SP-101-1896.pdf	2	⚠	✎
SP-101-1897.pdf	2	⚠	✎
SP-101-1898.pdf	1	⚠	✎
SP-101-1899.pdf	27	⚠	✎
SP-101-1900.pdf	2	⚠	✎
SP-101-1901.pdf	1	⚠	✎
SP-101-1902.pdf	1	⚠	✎
SP-101-1903.pdf	2	⚠	✎
SP-101-1904.pdf	2	⚠	✎
SP-101-1905.pdf	1	⚠	✎
SP-101-1906.pdf	1	⚠	✎
SP-101-1907.pdf	1	⚠	✎
SP-101-1908.pdf	2	⚠	✎
SP-101-1909.pdf	2	⚠	✎
SP-101-1910.pdf	1	⚠	✎

#### 🔄 Give unmatched files another chance

You can change the split parameter, or edit the file name, and re-run the matching process.

The files you already matched will not be affected.

#### Define split parameters:

\*Values must be inside quotation marks e.g. " - "  
\*Separate multiple values by a comma e.g. " - , "

Only have the tag number? Choose code here

#### 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.

In order allow users to match these files properly we have included the option to select the doc code to which you want to assign the files. This way DocBoss will know to which code belong the files and process them accordingly.

Once the matching process is completed click on "Accept Matches".

Step 1

## Files that could not be matched

Unmatched files will remain in the staging area.

File Name	Pages	Error	Tools
SP-101-1892.pdf	27	⚠	✏
SP-101-1893.pdf	2	⚠	✏
SP-101-1894.pdf	1	⚠	✏
SP-101-1895.pdf	1	⚠	✏
SP-101-1896.pdf	2	⚠	✏
SP-101-1897.pdf	2	⚠	✏
SP-101-1898.pdf	1	⚠	✏
SP-101-1899.pdf	27	⚠	✏
SP-101-1900.pdf	2	⚠	✏
SP-101-1901.pdf	1	⚠	✏
SP-101-1902.pdf	1	⚠	✏
SP-101-1903.pdf	2	⚠	✏
SP-101-1904.pdf	2	⚠	✏
SP-101-1905.pdf	1	⚠	✏
SP-101-1906.pdf	1	⚠	✏
SP-101-1907.pdf	1	⚠	✏
SP-101-1908.pdf	2	⚠	✏
SP-101-1909.pdf	2	⚠	✏
SP-101-1910.pdf	1	⚠	✏

### Give unmatched files another chance

You can change the split parameter, or edit the file name, and re-run the matching process.

The files you already matched will not be affected.

#### Define split parameters:

\*Values must be inside quotation marks e.g. " \_ "

\*Separate multiple values by a comma e.g. " \_ , "" "

" \_ " 2 Re-run matching

Only have the tag number? Choose code here

Select or type ahead... 1

- CED-ZZ1 - MATERIAL CERTIFICATES
- CED-ZZ1 - MATERIAL CERTIFICATES (Each)
- DETAIL DWG - ASSEMBLY DRAWING WITH PART NUMBERS - EN
- DETAIL DWG - ASSEMBLY DRAWING WITH PART NUMBERS - RU
- DETAIL DWG - NAME PLATE DRAWING - EN

## Step 2

### 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"/>	SP-101-1892.pdf	DETAIL DWG_SP-101-1892		001-DETAIL DWG-0001-001			✏
<input type="checkbox"/>	SP-101-1893.pdf	DETAIL DWG_SP-101-1893		001-DETAIL DWG-0002-001			✏
<input type="checkbox"/>	SP-101-1894.pdf	DETAIL DWG_SP-101-1894		001-DETAIL DWG-0003-001			✏
<input type="checkbox"/>	SP-101-1895.pdf	DETAIL DWG_SP-101-1895		001-DETAIL DWG-0004-001			✏
<input type="checkbox"/>	SP-101-1896.pdf	DETAIL DWG_SP-101-1896		001-DETAIL DWG-0005-001			✏
<input type="checkbox"/>	SP-101-1897.pdf	DETAIL DWG_SP-101-1897		001-DETAIL DWG-0006-001			✏
<input type="checkbox"/>	SP-101-1898.pdf	DETAIL DWG_SP-101-1898		001-DETAIL DWG-0007-001			✏
<input type="checkbox"/>	SP-101-1899.pdf	DETAIL DWG_SP-101-1899		001-DETAIL DWG-0008-001			✏
<input type="checkbox"/>	SP-101-1900.pdf	DETAIL DWG_SP-101-1900		001-DETAIL DWG-0009-001			✏
<input type="checkbox"/>	SP-101-1901.pdf	DETAIL DWG_SP-101-1901		001-DETAIL DWG-0010-001			✏
<input type="checkbox"/>	SP-101-1902.pdf	DETAIL DWG_SP-101-1902		001-DETAIL DWG-0011-001			✏
<input type="checkbox"/>	SP-101-1903.pdf	DETAIL DWG_SP-101-1903		001-DETAIL DWG-0012-001			✏
<input type="checkbox"/>	SP-101-1904.pdf	DETAIL DWG_SP-101-1904		001-DETAIL DWG-0013-001			✏
<input type="checkbox"/>	SP-101-1905.pdf	DETAIL DWG_SP-101-1905		001-DETAIL DWG-0014-001			✏
<input type="checkbox"/>	SP-101-1906.pdf	DETAIL DWG_SP-101-1906		001-DETAIL DWG-0015-001			✏
<input type="checkbox"/>	SP-101-1907.pdf	DETAIL DWG_SP-101-1907		001-DETAIL DWG-0016-001			✏
<input type="checkbox"/>	SP-101-1908.pdf	DETAIL DWG_SP-101-1908		001-DETAIL DWG-0017-001			✏
<input type="checkbox"/>	SP-101-1909.pdf	DETAIL DWG_SP-101-1909		001-DETAIL DWG-0018-001			✏
<input type="checkbox"/>	SP-101-1910.pdf	DETAIL DWG_SP-101-1910		001-DETAIL DWG-0019-001			✏
<input type="checkbox"/>	SP-101-1911.pdf	DETAIL DWG_SP-101-1911		001-DETAIL DWG-0020-001			✏

Select Page: SP-101-1892.pdf - SP-101-1911.pdf [20] Show on Page: 20

Cancel

Accept Matches

After matching files, keep in mind that you still need to set status and routing as applicable.

Cards In/Out / Incoming Documents  
From Krohne: 2019-05-06\_172593  
To Match 0 Apply Status & Routing 50

Bulk Process On

### Assign Status to Document Cards

Unprocessed 50 Processed 0

Process Individually Process In Bulk

File Name	Doc Code	Doc Code Name	Level	Reference	Sheet	Title	ACME Doc #	Wolfe PA Doc #	EU Do
SP-101-1892.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1892	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0001-001	
SP-101-1893.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1893	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0002-001	
SP-101-1894.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1894	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0003-001	
SP-101-1895.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1895	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0004-001	
SP-101-1896.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1896	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0005-001	
SP-101-1897.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1897	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0006-001	
SP-101-1898.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1898	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0007-001	
SP-101-1899.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1899	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0008-001	
SP-101-1900.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1900	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0009-001	
SP-101-1901.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1901	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0010-001	
SP-101-1902.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1902	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0011-001	
SP-101-1903.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1903	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0012-001	
SP-101-1904.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1904	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0013-001	
SP-101-1905.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1905	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0014-001	
SP-101-1906.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1906	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0015-001	
SP-101-1907.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1907	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0016-001	
SP-101-1908.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1908	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0017-001	
SP-101-1909.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1909	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0018-001	
SP-101-1910.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1910	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0019-001	
SP-101-1911.pdf	DETAIL DWG	ASSEMBLY DRAWING WITH PART NUMBERS - EN	Tag (TE)	SP-101-1911	1	ASSEMBLY DRAWING WITH PART NUMBERS - EN		001-DETAIL DWG-0020-001	

**Process Individually**

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

**Process In Bulk**

20 registers are selected  
Drag and drop document card(s) to bulk apply status & routing

Select Page: SP-101-1892.pdf - SP-101-1911.pdf [20] Show on Page: [20]