

Bulk Processing Default Settings

09/16/2024 1:50 pm MDT

How is the default setting determined on a project?

On each project the default values for bulk process are undefined until a submittal is made.

On the first submittal to a target, the default value is assigned from the USER profile and is shown in the submittal pop up (checked or unchecked).

Why? Some users are comfortable with bulk processing and like to use it. This format allows the default to be enabled for those users while leaving it off for less comfortable users.

How to change the setting on the user profile

Users can change the default value (per target) on their profile.

To Get Here:

1. *Click Settings*
2. *Click Edit your profile*
3. *Scroll to Defaults Settings*

Hi, Tunde Dorloti Edit your profile

- Users**
 - Manage Users
 - View Permissions
 - Manage Sub-Supplier Accounts
- Lists**
 - Companies
 - Contacts
 - Relationships
 - Jobs
 - Library Folders
- Library**
 - Manage Library
- Reports**
 - Project Metrics
 - Assignment Activity (By User)
- Admin**
 - General
 - Default Prices
 - OCR Layouts
 - Stages
 - Levels
 - Distribution Lists
 - Delivery Mediums
 - Queries List
 - Ignored Values
 - Documents Generation Status
- Customization**
 - Doc Code/Card Fields
 - Field Templates
 - Lists
 - Labels
- Template Mgmt**
 - Output Templates
 - Templates Types

Defaults

Dashboard settings

Dashboard Landing Page: Projects

Default Card Layout for "Incomplete with us":

Project setting

Project Landing Page:

Track Changes on page

CSV Delimiter: :

Grid settings

Copy Grid Settings: Do Not Copy (use system defaults)

250 rows per grid

Incoming Submittal Setting

- Use bulk processing on submittals from customer
- Use bulk processing on submittals from Internal
- Use bulk processing on submittals from sub-supplier

Save

Change the default on a project

The default for bulk process is only visible (and changeable) on when creating a NEW SUBMITTAL. When creating the submittal, uncheck "Enable bulk process".

Receive New Submittal
✕

Include Submittal Number *

Yes

No

Date *

2019-04-04

Add Description

Enable bulk process for new Customer submittals

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

Cancel
Create Folder

This setting will be saved for the project.

Setting is stored for EVERY submittal separately

The bulk process setting is saved for EVERY submittal. You may notice that when all files of a submittal are processed, the setting is automatically unchecked. This is to allow users to see the submittal data in an easier format when the processing is complete. So - while you can default the bulk process for new submittals - once it is complete it will automatically revert to unchecked.

What if I change inside the submittal?

There is an option to enable and disable the setting inside any given submittal. Note that this affect only the current submittal. It does not change the overall default for the project.

Cards In/Out / Incoming Documents
 From Sub-Sup: 2019-04-04_154213

Bulk Process Off

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

Unassigned 0 Assigned 0 Transmittal Doc 0

Assign to: Document Cards Obsolete Cards

Drag and drop files into document cards

Doc Code Select or type ahead... Search

Out of Workflow Show
Merged Show
Grid Row Colors

 Add
 Merge

		Customer Doc #	Code	Code Name 1	Document Card
		P7564-PO018-400-30-PRO-0015	PRO	Dye Penetrant Examination Procedure	E14016-PO-018-RM-400-P-0013
		P7564-PO018-400-30-PRO-0013	PRO	Hardness Test Procedure	E14016-PO-018-RM-400-P-0013
		P7564-PO018-400-30-PRO-0016	PRO	Heat Treatment Procedure	E14016-PO-018-RM-400-P-0013