# **Auto-Reclaim Submittal**

08/26/2025 3:20 pm MDT

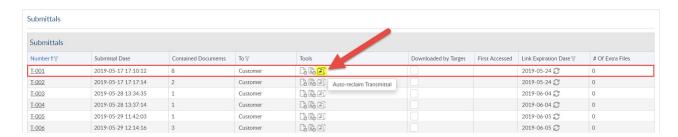
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The Auto-Reclaim feature allows users to complete the status of a document without uploading a new file. This is useful in situations where the customer approves a transmittal verbally or by email, but doesn't physically return the original transmittal or documents. Rather than re-upload all of the original docs (to maintain the workflow trail), users can click Auto-Reclaim Submittal, and work with the documents inside DocBoss. This process can also be used when a submittal is rejected, but a record trail is needed.

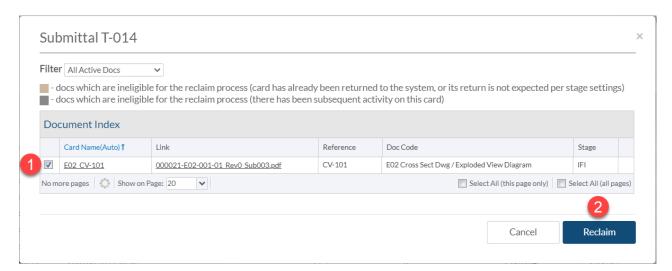
# **Auto-reclaim files**

To begin auto-reclaiming files, navigate to **Project Menu > Outgoing Submittals** and scroll to the "Submittals" section.

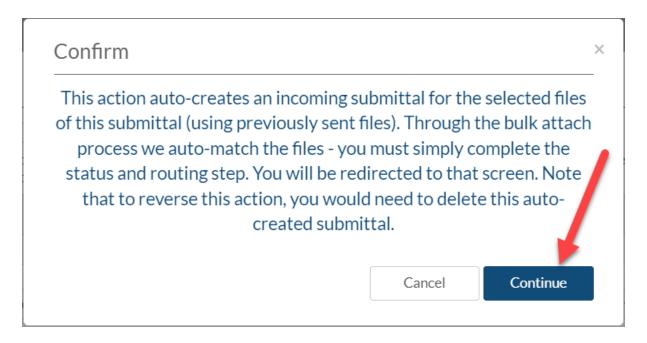
Select the **Auto-Reclaim Submittal** icon from the **Tools** column for the submittal containing the documents to be reclaimed.



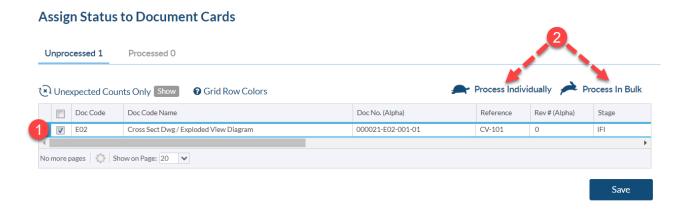
In the pop up screen, (1) select the applicable documents, and (2) select Reclaim.



A confirmation message will appear. Select Continue.



You will be redirected to the **Apply Status & Routing** screen. From here, (1) select the documents to be processed, and (2) select whether to process them individually (if different status and/or routing for each document) or in bulk (for documents to which the same status and routing will be applied).



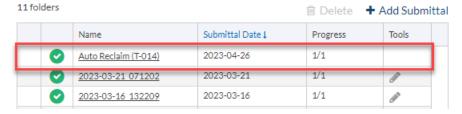
Select the appropriate doc status, apply a routing if required, then save to apply the changes.

# Processing 1 of 1 000021-E02-001-01\_Rev0\_Sub003.pdf Viewer Off Doc Status \* 2 - Approved with Major Comments. Re-submit Complete Current Stage Queue for Submittal Queue for submittal Osub-Supplier Internal/3rd party Add to Ad-Hoc Internal (User) Routing O Doc Control User Clark Kent ×

After all documents selected for auto-reclaim have been processed, a popup message will appear advising this, and the **Unprocessed** grid will not show any cards. The auto-reclaim process is complete.

To return to the auto-reclaimed submittal in the future, navigate to **Incoming Documents** and select the submittal from **Files from Customer** > **Existing Submittals**.

## **Existing Submittals**



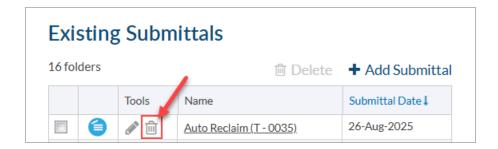
# Revert auto-reclaim

If an auto-reclaimed submittal needs to be reverted, this can be achieved at any point in the process. However, the earlier on in the process, the better!

### From auto-reclaim folder

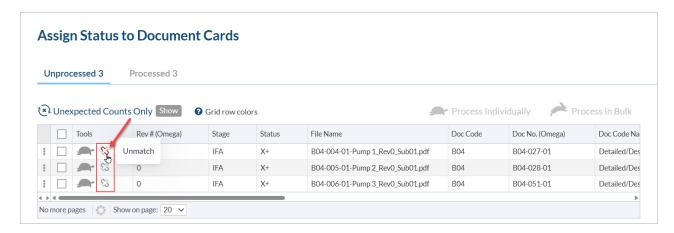
### No files processed

If the auto-reclaim folder has been created but no files have been processed, the auto-reclaim folder can simply be deleted. To do this, navigate to **Project Menu > Incoming Documents** and field the submittal in the grid. Under the "Tools" column, select the delete button.



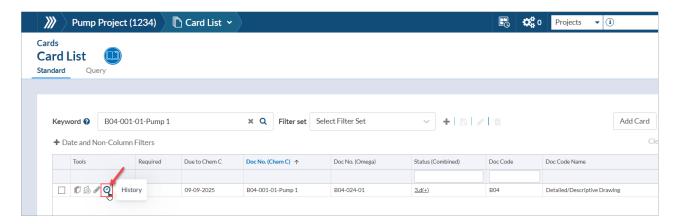
### Some files processed

If the auto-reclaim folder has been created and only **some** files have been processed, the unprocessed files can be removed from the auto-reclaim folder. To do this, navigate to **Project Menu > Incoming Documents** and open the auto-reclaim submittal. Under the "Unprocessed" tab, click the "Unmatch" icon under "Tools" for each file.



# From card history

Files that have already been processed can be reverted by navigating to the card list and opening the card history (via the clock icon under "Tools") for the cards(s) in question.



Once on the card history screen, find the history entry for the **most recent** submittal and click the "Revert file and meta-data" option under "Tools"



If history is reverted, the option to use auto-reclaim will not be available for this card when a return status is received. In this case, the files will need uploaded via Incoming Documents. If your customer does not return the files, simply download the original submittal and upload those same files to the "Customer" drop box via Incoming Documents.