

Auto-Reclaim Submittal













09/16/2024 1:59 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.

Navigate to **Outgoing Submittals > Submittals**.

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

Submittals									
Number ↑	Submittal Date	Contained Documents	To ↓	Tools	Downloaded by Target	First Accessed	Link Expiration Date ↓	# Of Extra Files	
T-001	2019-05-17 17:10:12	8	Customer		<input type="checkbox"/>		2019-05-24 	0	
T-002	2019-05-17 17:17:14	2	Customer		<input type="checkbox"/>		2019-05-24 	0	
T-003	2019-05-28 13:34:35	1	Customer		<input type="checkbox"/>		2019-06-04 	0	
T-004	2019-05-28 13:37:14	1	Customer		<input type="checkbox"/>		2019-06-04 	0	
T-005	2019-05-29 11:42:03	1	Customer		<input type="checkbox"/>		2019-06-05 	0	
T-006	2019-05-29 12:14:16	3	Customer		<input type="checkbox"/>		2019-06-05 	0	

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

Submittal T-014

Filter: All Active Docs

- docs which are ineligible for the reclaim process (card has already been returned to the system, or its return is not expected per stage settings)
- docs which are ineligible for the reclaim process (there has been subsequent activity on this card)

Document Index						
	Card Name(Auto) ↑	Link	Reference	Doc Code	Stage	
1	<input checked="" type="checkbox"/>	E02 CV-101	000021-E02-001-01_Rev0_Sub003.pdf	CV-101	E02 Cross Sect Dwg / Exploded View Diagram	IFI

No more pages | Show on Page: 20 | Select All (this page only) | Select All (all pages)

2

Cancel Reclaim

A confirmation message will appear. Select **Continue**.

Confirm

This action auto-creates an incoming submittal for the selected files of this submittal (using previously sent files). Through the bulk attach process we auto-match the files - you must simply complete the status and routing step. You will be redirected to that screen. Note that to reverse this action, you would need to delete this auto-created submittal.

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).

Assign Status to Document Cards

Unprocessed 1 Processed 0

Unexpected Counts Only Grid Row Colors

Process Individually Process In Bulk

<input type="checkbox"/>	Doc Code	Doc Code Name	Doc No. (Alpha)	Reference	Rev # (Alpha)	Stage
<input checked="" type="checkbox"/>	E02	Cross Sect Dwg / Exploded View Diagram	000021-E02-001-01	CV-101	0	IFI

No more pages Show on Page: 20

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

1

Doc Status *

2 - Approved with Major Comments. Re-submit

Complete Current Stage

Queue for Submittal

Queue for submittal to Sub-Supplier Internal/3rd party

Add to Ad-Hoc

Internal (User) Routing

Doc Control User

Clark Kent

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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

11 folders

Delete Add Submittal

	Name	Submittal Date ↓	Progress	Tools
<input checked="" type="checkbox"/>	Auto Reclaim (T-014)	2023-04-26	1/1	
<input checked="" type="checkbox"/>	2023-03-21 071202	2023-03-21	1/1	
<input checked="" type="checkbox"/>	2023-03-16 132209	2023-03-16	1/1	