

# 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.

Submittals									
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.

Cancel

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).

### Assign Status to Document Cards

Unprocessed 1    Processed 0

Unexpected Counts Only [Show](#)    Grid Row Colors

Process Individually    Process In Bulk

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

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Save

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

2

### Internal (User) Routing ⓘ

☒ 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

11 folders

Delete Add Submittal

		Name	Submittal Date ↓	Progress	Tools
	✓	<a href="#">Auto Reclaim (T-014)</a>	2023-04-26	1/1	
	✓	<a href="#">2023-03-21 071202</a>	2023-03-21	1/1	
	✓	<a href="#">2023-03-16 132209</a>	2023-03-16	1/1	

## 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 find the submittal in the grid. Under the "Tools" column, select the delete button.

## Existing Submittals

16 folders

 Delete  Add Submittal

	Tools	Name	Submittal Date ↓
   		Auto Reclaim (T - 0035)	26-Aug-2025

## 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.


## Assign Status to Document Cards

Unprocessed 3

Processed 3




 Unexpected Counts Only

Show

 Grid row colors

 Process Individually

 Process In Bulk

	Tools	Rev # (Omega)	Stage	Status	File Name	Doc Code	Doc No. (Omega)	Doc Code Na
		Unmatch	IFA	X+	B04-004-01-Pump 1_Rev0_Sub01.pdf	B04	B04-027-01	Detailed/Des
		0	IFA	X+	B04-005-01-Pump 2_Rev0_Sub01.pdf	B04	B04-028-01	Detailed/Des
		0	IFA	X+	B04-006-01-Pump 3_Rev0_Sub01.pdf	B04	B04-051-01	Detailed/Des



No more pages





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## 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 card(s) in question.



 Pump Project (1234)  Card List


 Cards

**Card List** 

Standard Query

Keyword  B04-001-01-Pump 1  Filter set Select Filter Set     Add Card

 Date and Non-Column Filters 

Tools	Required	Due to Chem C	Doc No. (Chem C) ↑	Doc No. (Omega)	Status (Combined)	Doc Code	Doc Code Name
		09-09-2025	B04-001-01-Pump 1	B04-024-01	3.d(+)	B04	Detailed/Descriptive Drawing

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"

Pump Project (1234) / Card History  
B04-024-01 (B04\_A001)

File History

Ⓢ Active send/return pairs [Show](#) Ⓢ Entries displayed on cover pages [Show](#) ⓘ Grid row colors [Move active file to a different](#)

Tools	Rev # (Omega)	Stage	System Comments	Status	Active SEND record	Active RETURN record
	0	IFA	Document reclaimed from T - 0037.	3.d(+)		Ⓢ
	0	IFA	Card submitted on T - 0037	X+	Ⓢ	
	0	IFA		X(+)		
	0	IFA	Doc No. (Supplier) was re-generated due to change on Code List.	NULL		
	0	IFA	Card set to required.	NULL		

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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.