

Auto-Reclaim Submittal

05/11/2026 12:07 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 open the "Submittals Sent" section.

Select the "Auto-reclaim submittal" icon from the "Tools" column for the submittal containing the documents to be reclaimed.

The screenshot shows the 'Outgoing Submittals' section of a software interface. At the top, there are navigation tabs for 'Pump Project (4531)' and 'Outgoing Submittals'. Below this, the 'Cards In/Out' section is visible, with 'Outgoing Submittals' selected. A red box highlights the 'Submittals Sent' tab. Below the tabs is a table with columns: Tools, Number, Created, Submittal Date, To, and Link Expiration Date. The table contains several rows of submittals. A red box highlights the 'Auto-reclaim submittal' icon in the 'Tools' column of the row for submittal T-017.

Tools	Number	Created	Submittal Date	To	Link Expiration Date
	T-019	2026-04-27 12:30:31	2026-04-27 13:27:46	Customer	2026-05-04
	T-017	2026-02-18 12:48:30	2026-02-18 12:48:17	Customer	2026-02-25
	T-016	2026-02-17 16:22:40	2026-02-17 16:21:40	Customer	2026-02-24

In the pop up screen, select the applicable documents and then click **Reclaim**.

The screenshot shows a pop-up window titled 'Submittal T-018'. It contains a table with columns: Card Name(Auto), Doc Code, Reference, Doc No. (WI), Doc No. (Delta), and Rev # (WI). The first row is selected, and a red box highlights the 'Reclaim' button at the bottom right.

Card Name(Auto)	Doc Code	Reference	Doc No. (WI)	Doc No. (Delta)	Rev # (WI)
<input checked="" type="checkbox"/> B02_CV9876	B02 Misc. Drawings	CV9876	4531-B02-004-01		0
<input type="checkbox"/> B02_GV1234	B02 Misc. Drawings	GV1234	4531-B02-006-01		0
<input type="checkbox"/> B02_GV5678	B02 Misc. Drawings	GV5678	4531-B02-007-01		0

A new incoming submittal (source set as the submittal target) will be created using the outgoing submittal number and the prefix "Auto Reclaim". This incoming submittal number can be modified, or you can choose to not record a submittal number. Then, click "Create".

Create Auto Reclaim Folder

From source: Customer

Include Submittal Number *

Yes

No

Auto Reclaim (T-018)

Date *

2026-04-27

Add Description

Cancel Create

You will be redirected to the **Incoming Documents > Apply Status & Routing** screen. From here, select the document(s) to be processed, and choose whether to process 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). Then, process the document(s) as usual (i.e., apply the appropriate status, add internal routing (if required), etc.).

Assign Status to Document Cards

Unprocessed 1 Processed 0

Tools Restart IA process Status Doc Code Doc Code Name Rev # (WI) Reference Level

X+ B02 Misc. Drawings 0 CV9876 Item/Model (TE)

Process Individually Process In Bulk

Process Individually

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

Save

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 **Project Menu > Cards In/Out > Incoming Documents** and select the submittal from **Files from [Customer] > Existing Submittals**.

Existing Submittals

13 folders Delete + Add Submittal

	Tools	Name	Progress	Submittal Da
<input checked="" type="checkbox"/>		<u>Auto Reclaim (T-018)</u>	3/3	2026-04-27

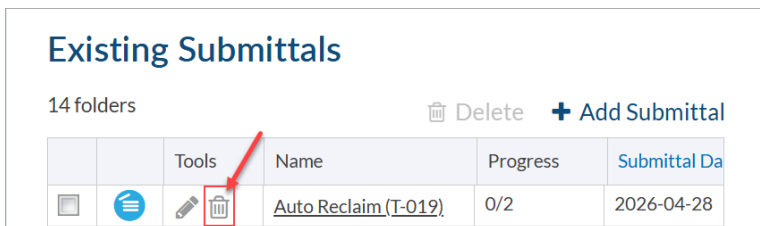
Revert auto-reclaim

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.



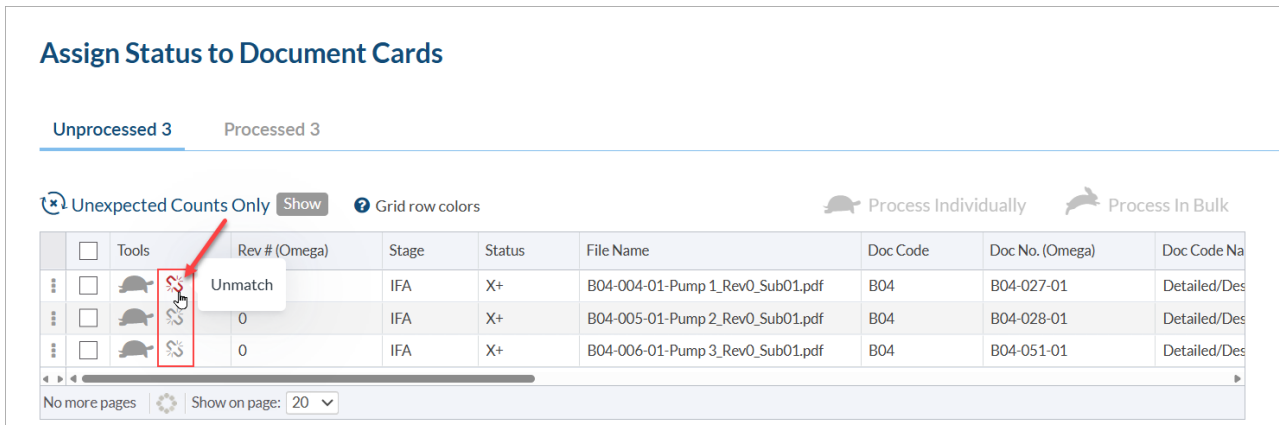
Existing Submittals

14 folders Delete + Add Submittal

	Tools	Name	Progress	Submittal Da
		Auto Reclaim (T-019)	0/2	2026-04-28

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
		0	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

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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

+ 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 location

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.