

Manage Internal Review Outside of DocBoss

09/11/2025 12:48 pm MDT

If your company prefers to complete their internal document review outside of DocBoss (using a service such as Bluebeam, Adobe Pro, etc.), you can still manage the documentation in DocBoss. To do this, we recommend following the process below.

1. Create a "placeholder" user account

The first step is to create a placeholder account to manage the internal approval workflow. In doing so, there will be increased traceability as to where your documents are (i.e., if they are out for review, or still in the system waiting to be sent).

To create a new user account, navigate to **System Menu > Users > Manage Users**. Above the grid, click the "+ Add" button and fill out the required fields. Since this is a placeholder account, you can fill in the details to clearly indicate this.

Example:

User Info	First name = EXTERNAL Last name = AWAITING UPLOAD Address = 123 Main Street.
Permissions	Role = Reviewer Login = Your email + 1 (e.g., doejohn+1@company.com) Password = *****
Affiliate	*If applicable
Email notifications	<i>Note: If this account is set up to your email address, you will receive any notifications that are enabled. If you would prefer not to receive notifications related to this account, you can disable all available options.</i>



Make sure to uncheck the the "Send initiation email" and "Force user to change password" options to avoid receiving emails related to this placeholder user.

The screenshot shows the 'Create user account' form with the following fields and options:

- Login**: (field)
- Identity**:
 - Email**: (field, value: doejohn+1@company.com)
- Password and Authentication**:
 - ☐ Send invitation email
 - New password**: (field, requirement: Must contain 10 letters, including a capital, a number, and a symbol.)
 - Confirm new password**: (field)
 - ☐ Force user to change password

2. Upload documents from source

Once the placeholder user is created, you can start the process of bringing documents in from the source (e.g., sub-supplier). Once uploaded, the files can either be assigned **individually** or **in bulk**.

- Option 1: If assigning files **individually**, set the internal routing to you (doc controller) and to the placeholder user created previously (preparer) for **each document**.
- Option 2: If assigning files **in bulk**, set the internal routing to you (doc controller) and to the placeholder user created previously (preparer) **all at once**.

Set Status And Routing

Status & Routing

Approval Status *
P - Pending - No Status Applied

☒ Review
☒ Set reviewers manually
☐ Add to Ad-Hoc

Internal (User) Routing - Approval Cycle

☒ Doc Controller User
Alysha Mosveen

☒ Preparer User
EXTERNAL AWAITING UPLOAD

☐ Checker User
Select or type ahead...

☐ Approver User
Select or type ahead...

Due to Doc Controller Date
2025-09-17

Cancel Save

3. Bulk document download & complete action

After assignment, navigate to **Project Menu > Outstanding Actions** and filter the grid to see the actions assigned to you (doc controller). Select the appropriate files from the grid, click "More Actions," and choose "Bulk Doc Download" to download the file assigned to each card.

Outstanding Actions

Users: Alysha Mosveen

Filter set: Select Filter Set

Users IN: Alysha Mosveen

Show action/card due date problems only

Card Name(Auto)	Doc No.(Omega)	Doc Code	Title	Status (Combined)	Doc Controller	Preparer	Checker	Date
B03_123ABC456DE	0001234-B03-001-01	B03	Cross Section Drawings	X[Pdp<->]	Alysha Mosveen	EXTERNAL AWAITING UPLOAD		2025-09-10 18:10
B03_234ABC567DE	0001234-B03-002-01	B03	Cross Section Drawings	X[Pdp<->]	Alysha Mosveen	EXTERNAL AWAITING UPLOAD		2025-09-10 18:10
B03_345ABC678DE	0001234-B03-003-01	B03	Cross Section Drawings	X[Pdp<->]	Alysha Mosveen	EXTERNAL AWAITING UPLOAD		2025-09-10 18:10
B03_456ABC789DE	0001234-B03-004-01	B03	Cross Section Drawings	X[Pdp<->]	Alysha Mosveen	EXTERNAL AWAITING UPLOAD		2025-09-10 18:10

More Actions

- Bulk Doc Download
- Export to CSV
- Update action due dates for null cards

Save

Once downloaded, send the files to your reviewer(s) and/or upload the files to your external review system outside of DocBoss. Once sent, complete your action (either [individually](#) or [in bulk](#)). To complete in bulk, select the appropriate files from the grid, click "More Actions," and choose "Bulk Complete Actions."

The screenshot shows the 'Outstanding Actions' page. At the top, there's a header with 'Valve Project (0001234)' and 'Outstanding Actions'. Below this, there's a filter section with 'Users: Alysha Mosveen' and 'Filter set: Select Filter Set'. A table of documents is displayed with columns: Card Name(Auto), Doc No. (Omega), Doc Code, Title, Status (Combined), Doc Controller, Preparer, and Checker. The table contains four rows of documents, all with status 'EXTERNAL AWAITING UPLOAD' and assigned to 'Alysha Mosveen'. A dropdown menu is open, showing options: 'Bulk Complete Actions', 'Bulk Doc Download', 'Export to CSV', and 'Update action due dates for null cards'. Red numbered callouts (1, 2, 3, 4) highlight specific elements: (1) the 'Users' filter, (2) the 'More Actions' dropdown, (3) the 'Bulk Complete Actions' option, and (4) the 'Bulk Complete Actions' option in the dropdown menu.



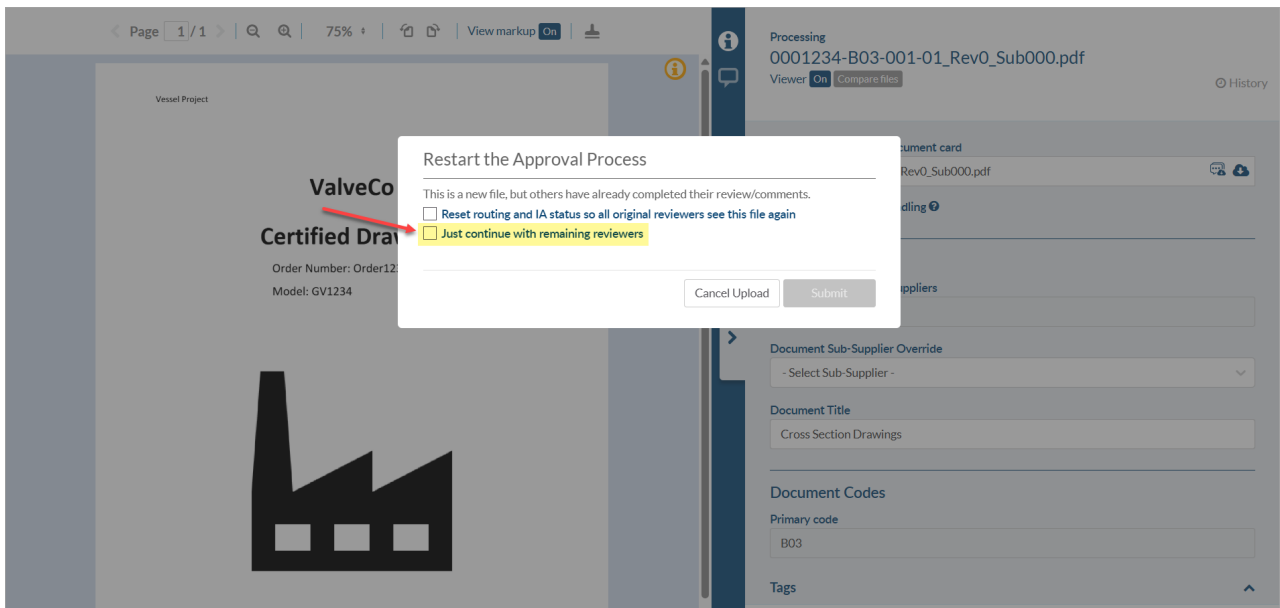
If you do not see the option to bulk complete actions, confirm that (1) the grid has been filtered to your name, and (2) the "Enable bulk action completion" setting has been enabled on your user profile (System Menu > Edit your profile > Permissions)

Once the action is complete, the card will automatically move to the next reviewer (i.e., the placeholder), indicating that the files have been sent out of DocBoss for review, and they are awaiting return.

4. Upload files & assign approval status

After the files have been reviewed outside of DocBoss, bring the files back into the system via incoming documents (using the "internal" drop zone). Once uploaded, the files can either be assigned [individually](#) or [in bulk](#).

- Option 1: If assigning files **individually**, you will receive a pop-up indicating that internal approval is in progress. To move forward, check the option to "Just continue with remaining reviewers" and remove the routing to the placeholder user. Once a status is assigned, the document will continue through the workflow as defined by the [stage settings](#) (e.g., confirm to source, continue stage after IA).



- Option 2: If assigning files (AND processing them) in **bulk**, the IA process will automatically be reset, and all previous routings will be removed. Once a status is assigned, all processed documents will continue through the workflow as defined by the **stage settings** (e.g., confirm to source, continue stage after IA).

Valve Project (0001234)
Incoming Documents

Cards In/Out /Incoming Documents
From Omega: 2025-09-10_182900

To Match 0
Apply Status & Routing 4

Assign Status to Document Cards

Unprocessed 4
Processed 0

Unexpected Counts Only
Show
Grid row colors
Process Individually

Tools	Rev # (Omega)	Stage	Status	File Name	Doc Code	Doc No.
<input checked="" type="checkbox"/>	0	IFA (IA)	X[Pg<->]	0001234-B03-001-01_Rev0_Sub000.pdf	B03	0001234
<input checked="" type="checkbox"/>	0	IFA (IA)	X[Pg<->]	0001234-B03-002-01_Rev0_Sub000.pdf	B03	0001234
<input checked="" type="checkbox"/>	0	IFA (IA)	X[Pg<->]	0001234-B03-003-01_Rev0_Sub000.pdf	B03	0001234
<input checked="" type="checkbox"/>	0	IFA (IA)	X[Pg<->]	0001234-B03-004-01_Rev0_Sub000.pdf	B03	0001234

Set Status And Routing

☐ Force exceptional handling

Status & Routing

Approval Status *

- Select Approval Status -

- Select Approval Status -

A - Approved - No Comments

AwCR - Approved - With Comments (Resubmit)

P - Pending - No Status Applied

R - Rejected - Apply Changes (Resubmit)

Comments for NEXT ACME submittal

Drag and drop new file
Or choose files from disk

Comments for NEXT Sub-Supplier submittal

Drag and drop new file
Or choose files from disk