

Manage Internal Review Outside of DocBoss

01/19/2026 3:13 pm MST

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 sections:

- Login**: A field for the login name.
- Identity**: A field for the email address, containing 'doejohn+1@company.com'.
- Password and Authentication**:
 - A checkbox for 'Send Invitation email' which is unchecked.
 - Fields for 'New password' and 'Confirm new password'.
 - A checkbox for 'Force user to change password' which is unchecked.

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	Due 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

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."

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



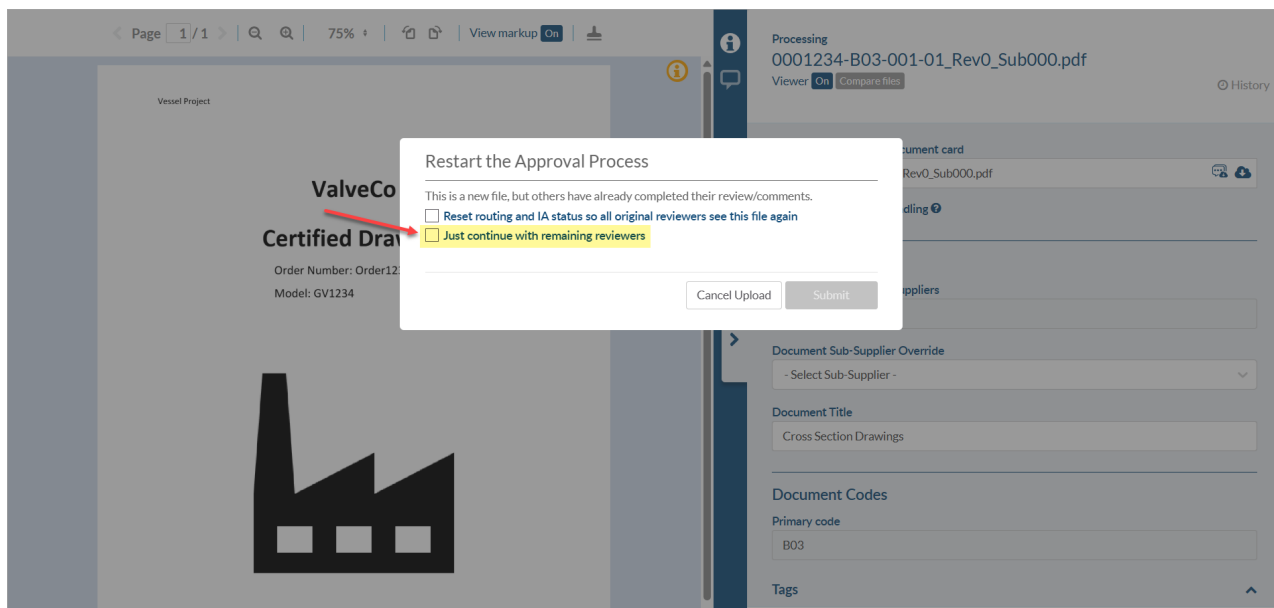
If you do not see the option to bulk complete actions, confirm that (1) the grid has been filtered to your name, and (2) the "Enable bulk action completion" setting has been enabled on your user profile (System Menu > Edit your profile > Permissions)

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 **manually remove the routing to the placeholder user**. Once a status is assigned and the card is processed, the workflow will continue 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 placeholder user will be automatically removed. Once a status is assigned and the card(s) is processed, the workflow will continue as defined by the stage settings (e.g., confirm to source, continue stage after IA).

