

# Manage Internal Review Outside of DocBoss

03/09/2026 12:19 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** (header)
- Identity**
  - Email** (required): doejohn+1@company.com
- Password and Authentication**
  - Send invitation email** (highlighted with a red box and arrow)
  - New password** (required): Must contain 10 letters, including a capital, a number, and a symbol.
  - Confirm new password** (required)
  - Force user to change password** (highlighted with a red box and arrow)

## 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**.

The screenshot shows the 'Assign Status to Document Cards' interface for 'E-House Project (13245)'. The main area displays a table of document cards with columns for Tools, Status, Doc Code, Doc No. (Omega CAN), Incoming Page Count, and Expected Cover Pages. Two cards are listed, both with a status of NULL. A modal window titled 'Set Status And Routing' is open on the right, showing configuration options for approval status, review settings, and internal routing. The 'Internal (User) Routing- Approval Cycle' section is highlighted with a red box, showing 'Doc Controller user' set to 'Alysha Mosveen' and 'Preparer user' set to 'EXTERNAL AWAITING UPLOAD'. The 'Doc Controller action due date' is set to 16-Mar-2026.

## 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.

The screenshot shows the 'Outstanding Actions' interface for 'E-House Project (13245)'. The main area displays a grid of document cards with columns for Card Name (Auto), Doc Code, Title, Doc No. (Omega CAN), Status (Combined), Action Due Date, Doc Controller, and Preparer. Two cards are listed, both with a status of X[Pdpc--]. A dropdown menu is open over the grid, showing options for 'Bulk Complete Actions', 'Bulk Doc Download', 'Export to CSV', 'Update Action Due Date', and 'User Actions Re-Assign'. The 'Bulk Doc Download' option is highlighted with a red box. A red box labeled 'A' highlights the 'Action Users IN: Alysha Mosveen' filter. A red box labeled 'B' highlights the selection checkboxes for the two document cards. A red box labeled 'C' highlights the 'More Actions' dropdown menu. A red box labeled 'D' highlights the 'Bulk Doc Download' option in the dropdown menu.

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."

Outstanding Actions

Filter set: Select Filter Set

+ Visibility: + Non-Column Filters Action Users IN: Alysha Mosveen x

Card Name(Auto)	Doc Code ↓	Title	Doc No. (Omega CAN)	Status (Combined)	Action Due Date	Doc Controller	Preparer
<input checked="" type="checkbox"/> B01_13245-B01-019-01	B01	General Arrangement Drawings	13245-B01-019-01	X(Rdp<->)	16-Mar-2026	Alysha Mosveen	EXTERNAL AWAI
<input checked="" type="checkbox"/> B01_13245-B01-022-01	B01	General Arrangement Drawings	13245-B01-022-01	X(Rdp<->)	16-Mar-2026	Alysha Mosveen	EXTERNAL AWAI

No more pages Show on page: 30

Grid row colors

Select all (this page only) Select all (all pages)



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).

Restart the approval process?

This is a new file, but others have already completed their review/comments.

Reset routing and IA status so all original reviewers see this file again

Just continue with remaining reviewers

Cancel Upload Submit

- 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).

Cards In/Out /Incoming Documents  
From Omega Supply - CAN: 2026-03-09\_111148

To Match 0 Apply Status & Routing 2

### Assign Status to Document Cards

Unprocessed 2 Processed 0

Unexpected Counts Only Show Grid row colors

Process Individually

<input checked="" type="checkbox"/>	Tools	Status	Doc Code	Doc No. (Omega CAN) ↑	Incoming Page Count	Expected Cover Pages
<input checked="" type="checkbox"/>		X[Pp<->]	B01	13245-B01-019-01	1	0
<input checked="" type="checkbox"/>		X[Pp<->]	B01	13245-B01-022-01	1	0

No more pages Show on page: 20

### Set Status And Routing

#### Status & Routing

Approval status \*

A - Approved

Review

Set reviewers manually

Add to Ad-Hoc queue on save (no workflow impact)

#### Comments

Comments for NEXT Chem C submittal

Drag and drop new file Or choose files from disk