

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

Create user account ✖ Collapse All ✖ Expand All

Login

Identity

Email *
doejohn+1@company.com

Password and Authentication

Send invitation email (Red arrow)

New password
Must contain 10 letters, including a capital, a number, and a symbol.

Confirm new password

Force user to change password (Red 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 'Incoming Documents' screen for 'Valve Project (0001234)'. The left panel displays a grid of document cards with columns: Doc Name, Doc Code, Status, and Doc No. The right panel, titled 'Set Status And Routing', shows the 'Status & Routing' section. The 'Doc Controller User' field is populated with 'Alysha Mosveen' (highlighted with a red box). The 'Preparer User' field is populated with 'EXTERNAL AWAITING UPLOAD' (highlighted with a red box). Other fields like 'Checker User' and 'Approver User' are empty. The 'Due to Doc Controller Date' is set to '2025-09-17'. The 'Save' button is at the bottom right.

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' screen for 'Valve Project (0001234)'. The grid lists actions assigned to 'Alysha Mosveen'. Numbered arrows point to specific elements: 1 points to the 'Users' filter dropdown; 2 points to a selected row in the grid; 3 points to the 'More Actions' dropdown menu; 4 points to the 'Bulk Doc Download' option in the dropdown menu. Other visible options in the menu include 'Save', 'Export to CSV', and '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."

1. Users filter input: Alysha Mosveen

2. Selected row in the grid: B03_123ABC456DE, Doc No. (Omega): 0001234-B03-001-01, Doc Code: B03, Title: Cross Section Drawings, Status: X[Pdp<->], Preparer: Alysha Mosveen, Checker: Alysha Mosveen, Status: EXTERNAL AWAITING UPLOAD, Due Date: 2025-09-10 18:11

3. More Actions button

4. Bulk Complete Actions option in the context menu



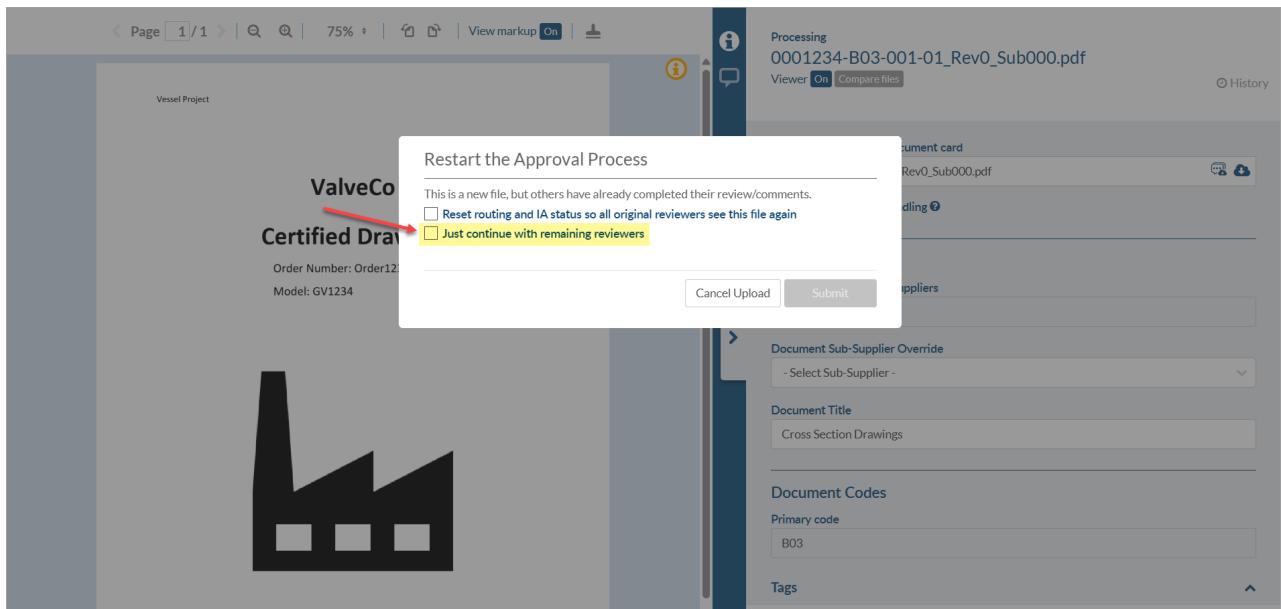
If you do not see the option to bulk complete actions, confirm that (1) the grid has been filtered to your name, and (2) the "Enable bulk action completion" setting has been enabled on your user profile ([System Menu > Edit your profile > Permissions](#))

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 [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).