

# User Roles

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## Overview

There are 4 user access levels available in DocBoss: Admin, Full, Review, and View. User roles are default permission sets available to users. (To limit individual users' access beyond their default role access limits, see the article on [User Permissions](#).)

- **Admin:** Generally for doc control leads/project management leads
- **Full:** Generally for doc control and/or project co-ordinators.
- **Review:** Generally for project managers, engineers, and drafters.
- **View:** Generally for managers/supervisors.

Below is a list of default permissions for each role:

API		View	Review	Full	Admin	+ Security
Add API connection						✓
Authentication		View	Review	Full	Admin	+ Security
Manage user authentication settings				✓	✓	✓
Companies		View	Review	Full	Admin	+ Security
Manage	Excel import companies list			✓	✓	✓
Manage	Excel export companies list			✓	✓	✓
Profile	Add new company			✓	✓	✓
Profile	Edit company profile			✓	✓	✓
Profile	View company	✓	✓	✓	✓	✓
Doc codes	Add new doc code list for customer			✓	✓	✓
Doc codes	Add new doc code list for affiliate			✓	✓	✓
Doc codes	View doc code list for customer (admin)	✓	✓	✓	✓	✓
Doc codes	View doc code list for affiliate	✓	✓	✓	✓	✓
Return status	Add new return status list for customer			✓	✓	✓
Return status	Add new return status list for affiliate			✓	✓	✓
Return status	View return status list for customer (admin)			✓	✓	✓
Return status	View return status list for customer (on project)	✓	✓	✓	✓	✓
Return status	View return status list for affiliate			✓	✓	✓
Internal approval status	Add/Edit internal approval status list			✓	✓	✓
Internal approval status	View internal approval status list	✓	✓	✓	✓	✓
Compile & Pkg Presets		View	Review	Full	Admin	+ Security
Add/edit compilation and package presets (system)					✓	✓
Add/edit compilation and package presets (on project)				✓	✓	✓
Contacts		View	Review	Full	Admin	+ Security
Add/edit contacts				✓	✓	✓
View contacts (full list)		✓	✓	✓	✓	✓
Custom Fields		View	Review	Full	Admin	+ Security
Add custom equipment field (on project)				✓	✓	✓

Add custom equipment field (default)				✓	✓
Add custom doc code/card fields				✓	✓
Add/edit project main fields			✓	✓	✓
Add/edit library card fields				✓	✓
Add/edit custom lists (for fields)				✓	✓
Set (add) custom levels defaults				✓	✓
<b>Customization</b>	View	Review	Full	Admin	+ Security
Change labels (for project, etc.)				✓	✓
<b>Distribution Lists</b>	View	Review	Full	Admin	+ Security
Create/manage (on project)			✓	✓	✓
Create/manage from admin				✓	✓
<b>eSignature</b>	View	Review	Full	Admin	+ Security
Manage instance eSignature settings					✓
Sign documents		✓	✓	✓	✓
View documents pending signature		✓	✓	✓	✓
<b>Expedite Projects</b>	View	Review	Full	Admin	+ Security
Configure expedite report for projects			✓	✓	✓
Generate expedite requests			✓	✓	✓
View expedite list			✓	✓	✓
View expedite report configuration (on project)	✓	✓	✓	✓	✓
View expedite log (history of sent)			✓	✓	✓
<b>Generation Status</b>	View	Review	Full	Admin	+ Security
View document generation statuses			✓	✓	✓
<b>Jobs</b>	View	Review	Full	Admin	+ Security
Add/edit jobs		✓	✓	✓	✓
View jobs	✓	✓	✓	✓	✓
<b>Library</b>	View	Review	Full	Admin	+ Security
View library		✓	✓	✓	✓
Upload files to library		✓	✓	✓	✓
Add/edit library cards		✓	✓	✓	✓
Add new library folder (i.e., document type)		✓	✓	✓	✓
Edit existing library folder (i.e., document type)		✓	✓	✓	✓
<b>Multi-Project Card Report</b>	View	Review	Full	Admin	+ Security
Search across multiple projects	✓	✓	✓	✓	✓
Bulk download active (main) files	✓	✓	✓	✓	✓
Bulk download secondary/native files	✓	✓	✓	✓	✓
Bulk download comment files	✓	✓	✓	✓	✓
Generate & download CSV report	✓	✓	✓	✓	✓
Set expected date			✓	✓	✓
Create private filter set	✓	✓	✓	✓	✓
Create public filter set	✓	✓	✓	✓	✓
<b>Other Lists</b>	View	Review	Full	Admin	+ Security
Add/edit other lists			✓	✓	✓
View other lists			✓	✓	✓
<b>Prices and Estimates</b>	View	Review	Full	Admin	+ Security
Manage Prices & Estimates on project			✓	✓	✓
Set default prices				✓	✓
<b>Project List</b>	View	Review	Full	Admin	+ Security

View list of projects (*with access given)	✓	✓	✓	✓	✓
Download list of projects (*with access given)	✓	✓	✓	✓	
<b>Project Templates</b>	View	Review	Full	Admin	+ Security
Edit in project			✓	✓	✓
Add/edit own project fields templates			✓	✓	✓
Add/edit all project fields templates				✓	✓
<b>Projects</b>	View	Review	Full	Admin	+ Security
View project (card list, code list, equipment list, etc.)	✓	✓	✓	✓	✓
Edit project (card list, code list, equipment list, etc.)			✓	✓	✓
Create project			✓	✓	✓
<b>Projects (Additional Actions)</b>	View	Review	Full	Admin	+ Security
Edit card states			✓	✓	✓
View card states	✓	✓	✓	✓	✓
Process card to unit changes			✓	✓	✓
Re-assign obsolete cards			✓	✓	✓
<b>Project List</b>	View	Review	Full	Admin	+ Security
View list of projects (dashboard/list/search)	✓	✓	✓	✓	
<b>Queries List</b>	View	Review	Full	Admin	+ Security
Add/edit queries				✓	✓
View queries list				✓	✓
<b>Relationships</b>	View	Review	Full	Admin	+ Security
Add/edit relationships			✓	✓	✓
View relationships	✓	✓	✓	✓	✓
<b>Reports</b>	View	Review	Full	Admin	+ Security
View (generate) Project Metrics report			✓	✓	✓
View (generate) Assignment Activity report			✓	✓	✓
<b>Routing Actions (System Level)</b>	View	Review	Full	Admin	+ Security
View open actions	✓	✓	✓	✓	✓
Download files	✓	✓	✓	✓	✓
Download CSV report	✓	✓	✓	✓	✓
Complete actions		✓	✓	✓	✓
Assign action on any card			✓	✓	✓
Assign action on card they are assigned to		✓	✓	✓	✓
<b>Routing Scenario</b>	View	Review	Full	Admin	+ Security
Set routing scenario defaults				✓	✓
<b>Stage Lists</b>	View	Review	Full	Admin	+ Security
Create/manage on project			✓	✓	✓
Create defaults				✓	✓
Edit/delete defaults				✓	✓
<b>Submittals</b>	View	Review	Full	Admin	+ Security
Make submittals			✓	✓	✓
<b>Supplier Portal</b>	View	Review	Full	Admin	+ Security
Add/edit sub-supplier accounts				✓	✓
View sub-supplier accounts				✓	✓
<b>Support Access</b>	View	Review	Full	Admin	+ Security
Allow support access			✓	✓	✓
<b>Templates</b>	View	Review	Full	Admin	+ Security

Upload templates to company profile			✓	✓	✓
Add/edit own templates			✓	✓	✓
Add/edit all templates				✓	✓
<b>User Management</b>	<b>View</b>	<b>Review</b>	<b>Full</b>	<b>Admin</b>	<b>+ Security</b>
Edit own user	✓	✓	✓	✓	✓
Add/edit/delete users				✓	✓
Reactivate inactive users					✓
View user list				✓	✓
Change own user email (if SSO)					✓
Change own affiliate(s)					✓
Change own role					✓
<b>User Permissions</b>	<b>View</b>	<b>Review</b>	<b>Full</b>	<b>Admin</b>	<b>+ Security</b>
View user permissions				✓	✓
Edit user permissions				✓	✓



Security permissions provide additional access that can be added to the admin role. To learn more, see this article: [Enable Security Permission for a User](#).