

# User Roles

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## Overview

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](#).

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## Definition of the user access levels

There are 4 user access levels available in DocBoss. Sorted by increasing levels of access, they are:

### **View:**

- Full view access. Run reports, view/downloads.
- Generally for managers/supervisors

### **Review:**

All view user access, plus:

- Can upload documents, and participate in review routing/approvals (be assigned documents)
- Generally project managers, engineers, drafter

### **Full:**

All review user access, plus:

- Full project access. Create transmittals, setup / edit project details.

- Generally doc control and/or project coordinators.
- Or any user who needs to make submittals.

### Admin:

All full user access, plus:

- Add new users, define system settings, and change template ownership.
- Generally doc control leads / project mgmt. leads

# Menu options per user role

The tables below show which screens each user role has access to select from the major menus within DocBoss (logo menu, project menu, and system menu). Please note that the actual access users have on the different screens will vary depending on their role and individual permissions.

## Logo menu



From the DocBoss logo menu, users of each role type have access to the following screens (note that available actions within each screen vary per role):

ROLE	ADMIN	FULL	REVIEW	VIEW
Actions Dashboard	X	X	X	X
Project Dashboard	X	X	X	X
Project List	X	X	X	X
Multi-Project Card Report	X	X	X	X
Expedite Projects	X	X		
Sign Documents	X	X	X	
Add New Project	X	X		

## Project menu

From the DocBoss project menu, users of each role type have access to the following screens (note that available actions within each screen vary per role):

ROLE	ADMIN	FULL	REVIEW	VIEW
Project Hub	X	X	X	X
Outstanding Actions	X	X	X	X
Index Reports & Compilations	X	X	X	X
Prices & Estimates	X	X		
<b>Cards</b>				
Code List (Requirements)	X	X	X	X
Card List	X	X	X	X
Card to Unit Changes	X	X	X	X
Obsolete Cards	X	X	X	X

Request Cards from Supplier	X	X	X	X
<b>Cards In/Out</b>				
Incoming Documents	X	X	X	X
Outgoing Submittals	X	X	X	X
<b>Equipment</b>				
Equipment List	X	X	X	X
Levels	X	X	X	X
<b>Set Up</b>				
Main	X	X	X	X
Stage Lists	X	X	X	X
[Customer] Return Statuses	X	X	X	X
Expedite Settings	X	X	X	X
Internal Approval Statuses	X	X	X	X
Distribution Lists	X	X	X	X
Project Template	X	X	X	X
Compilation & Package Presets	X	X	X	X
Routing Scenario	X	X	X	X
Card States	X	X	X	X

## System menu

From the DocBoss system menu, users of each role type have access to the following screens (note that available actions within each screen vary per role):

ROLE	ADMIN	FULL	REVIEW	VIEW
Edit Your Profile	X	X	X	X
Allow Support Access	X*	X*		
<b>Users</b>				
Manage Users	X			
View Permissions	X			
<b>Lists</b>				
Companies	X	X	X	X
Contacts	X	X	X	X
Relationships	X	X	X	X
Jobs	X	X	X	X
<b>Library</b>				
Manage Library	X	X		
Library Folders	X	X		
<b>Reports</b>				
Project Metrics	X	X		
Assignment Activity (By User)	X	X		
<b>Admin</b>				
General	X			
Security Settings	X**			
Stage Lists	X	X		
Distribution Lists	X			
Compil. & Package Presets (List)	X			

Queries List	X			
Custom Levels	X			
Routing Scenario	X			
Generation Status	X	X		
Other Lists	X			
Project (Main) Fields	X			
Doc Code/Card Fields	X			
Equipment Fields	X			
Custom Lists (for fields)	X			
Project Templates	X	X		
Labels	X			
Output Templates	X	X		

*\*May not be available for some users if "Allow other users to grant system access to DocBoss support" is disabled under **Admin > Security Settings**.*

*\*\*Only available if **Security Settings** permission enabled under user's profile.*

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