User Roles

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Overview

There are 4 user access levels available in DocBoss: View, Review, Full and Admin. 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.)

- **View:** Generally for project managers/supervisors.
  - Access to all reports, documents, etc.
- **Review:** Generally for engineers/drafters.
  - All view functions, plus:
  - Upload documents to assigned cards, and participate in review routing/approvals, file markups, and vendor reviews.
- **Full:** Generally for doc control, inside sales, and/or project coordinators.
  - All review functions, plus:
  - Create submittals, setup/edit projects.
- **Admin:** Generally for doc control leads, project management leads, and/or IT.
  - All full functions, plus:
  - Add new users, create templates, define system settings/project defaults.
  - *Note: Any full user can be assigned administrator privileges.*

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**
Enable MFA (for users and/or submittal recipients)						✓
Enable requirement for submittal recipient authentication						✓
Enable MFA for submittal recipients on project (when required at admin)				✓	✓	✓
Disable MFA for submittal recipients on project (when required at admin)						✓
View authentication log						✓
Download data from authentication log						✓
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	✓	✓	✓	✓	✓
Compil & 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					✓	✓
Customization		**View**	**Review**	**Full**	**Admin**	**+ Security**
Change labels (for project, etc.)					✓	✓
Distribution Lists		**View**	**Review**	**Full**	**Admin**	**+ Security**
Create/manage (on project)				✓	✓	✓
Create/manage from admin					✓	✓
eSignature		**View**	**Review**	**Full**	**Admin**	**+ Security**
Manage instance eSignature settings						✓
Sign documents			✓	✓	✓	✓
View documents pending signature			✓	✓	✓	✓
Expedite Projects		**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)				✓	✓	✓
Generation Status		**View**	**Review**	**Full**	**Admin**	**+ Security**
View document generation statuses				✓	✓	✓
Jobs		**View**	**Review**	**Full**	**Admin**	**+ Security**
Add/edit jobs			✓	✓	✓	✓
View jobs		✓	✓	✓	✓	✓
Library		**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)				✓	✓	✓

Multi-Project Card Report	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	✓	✓	✓	✓	✓
Other Lists	**View**	**Review**	**Full**	**Admin**	**+ Security**
Add/edit other lists			✓	✓	✓
View other lists			✓	✓	✓
Prices and Estimates	**View**	**Review**	**Full**	**Admin**	**+ Security**
Manage Prices & Estimates on project			✓	✓	✓
Set default prices				✓	✓
Project List	**View**	**Review**	**Full**	**Admin**	**+ Security**
View list of projects (*with access given)	✓	✓	✓	✓	✓
Download list of projects (*with access given)	✓	✓	✓	✓	
Project Templates	**View**	**Review**	**Full**	**Admin**	**+ Security**
Edit in project			✓	✓	✓
Add/edit own project fields templates			✓	✓	✓
Add/edit all project fields templates				✓	✓
Projects	**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 (new/copy)			✓	✓	✓
Complete project			✓	✓	✓
Hide project			✓	✓	✓
Projects (Additional Actions)	**View**	**Review**	**Full**	**Admin**	**+ Security**
Edit card states			✓	✓	✓
View card states	✓	✓	✓	✓	✓
Process card to unit changes			✓	✓	✓
Re-assign obsolete cards			✓	✓	✓
Project List	**View**	**Review**	**Full**	**Admin**	**+ Security**
View list of projects (dashboard/list/search)	✓	✓	✓	✓	
Queries List	**View**	**Review**	**Full**	**Admin**	**+ Security**
Add/edit queries				✓	✓
View queries list				✓	✓
Relationships	**View**	**Review**	**Full**	**Admin**	**+ Security**
Add/edit relationships			✓	✓	✓
View relationships	✓	✓	✓	✓	✓
Reports	**View**	**Review**	**Full**	**Admin**	**+ Security**
View (generate) Project Metrics report			✓	✓	✓
View (generate) Assignment Activity report			✓	✓	✓
Routing Actions (System Level)	**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		✓	✓	✓	✓
Bulk re-assign action on any card				✓	✓
Bulk re-assign action on card they are assigned to		✓	✓	✓	✓
Routing Scenario	**View**	**Review**	**Full**	**Admin**	**+ Security**
Set routing scenario defaults				✓	✓
Stage Lists	**View**	**Review**	**Full**	**Admin**	**+ Security**
Create/manage on project			✓	✓	✓
Create defaults				✓	✓
Edit/delete defaults				✓	✓
Submittals	**View**	**Review**	**Full**	**Admin**	**+ Security**
Make submittals			✓	✓	✓
Supplier Portal	**View**	**Review**	**Full**	**Admin**	**+ Security**
Add/edit sub-supplier accounts				✓	✓
View sub-supplier accounts				✓	✓
Support Access	**View**	**Review**	**Full**	**Admin**	**+ Security**
Allow support access			✓	✓	✓
Templates	**View**	**Review**	**Full**	**Admin**	**+ Security**
Upload templates to company profile			✓	✓	✓
Add/edit own templates			✓	✓	✓
Add/edit all templates				✓	✓
User Management	**View**	**Review**	**Full**	**Admin**	**+ Security**
Edit own user	✓	✓	✓	✓	✓
Add/edit/inactivate users				✓	✓
Edit login name/email (for non-admin users - view/reviewer/full)				✓	✓
Edit login name/email (for admin users)					✓
Update login password (all users)				✓	✓
Reactivate inactive users					✓
Set commercial contact					✓
Enable security permission					✓
View user list				✓	✓
Change own user email (if SSO)					✓
Change own affiliate(s)					✓
Change own role					✓
User Permissions	**View**	**Review**	**Full**	**Admin**	**+ Security**
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.