User Roles

06/05/2025 9:20 am MDT

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:
 - $\circ \quad \text{Create submittals, setup/edit projects.} \\$
- 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						1
Authentication		View	Review	Full	Admin	+ Security
Manage user authent	ication settings			1	1	/
Companies		View	Review	Full	Admin	+ Security
Manage	Excel import companies list			1	1	1
Manage	Excel export companies list			1	1	1
Profile	Add new company			1	1	1
Profile	Edit company profile			1	1	✓
Profile	View company	1	1	1	1	✓
Doc codes	Add new doc code list for customer			1	1	✓
Doc codes	Add new doc code list for affiliate			1	1	✓
Doc codes	View doc code list for customer (admin)	1	1	1	1	✓
Doc codes	View doc code list for affiliate	1	1	1	1	✓
Return status	Add new return status list for customer			1	1	✓
Return status	Add new return status list for affiliate			1	1	✓
Return status	View return status list for customer (admin)			1	1	1
Return status	View return status list for customer (on project)	1	1	1	1	1
Return status	View return status list for affiliate			1	1	✓
Internal approval status	Add/Edit internal approval status list			1	1	1
Internal approval status	View internal approval status list	1	1	1	1	1

Compil & Pkg Presets	View	Review	Full	Admin	+ Security
Add/edit compilation and package presets (system)				1	1
Add/edit compilation and package presets (on project)			/	1	1
Contacts	View	Review	Full	Admin	+ Security
Add/edit contacts			1	1	1
View contacts (full list)	1	1	1	1	1
Custom Fields	View	Review	Full	Admin	+ Security
Add custom equipment field (on project)			1	1	1
Add custom equipment field (default)				1	1
Add custom doc code/card fields				1	1
Add/edit project main fields			1	1	1
Add/edit library card fields				1	1
Add/edit custom lists (for fields)				1	1
Set (add) custom levels defaults				1	1
Customization	View	Review	Full	Admin	+ Security
Change labels (for project, etc.)				1	1
Distribution Lists	View	Review	Full	Admin	+ Security
Create/manage (on project)			1	1	1
Create/manage from admin				1	1
eSignature	View	Review	Full	Admin	+ Security
Manage instance eSignature settings					✓
Sign documents		1	1	1	1
View documents pending signature		1	1	1	1
Expedite Projects	View	Review	Full	Admin	+ Security
Configure expedite report for projects			1	1	1
Generate expedite requests			1	1	1
View expedite list			1	1	/
View expedite report configuration (on project)	1	1	1	1	1
View expedite log (history of sent)			1	1	1
Generation Status	View	Review	Full	Admin	+ Security
View document generation statuses			1	1	1
Jobs	View	Review	Full	Admin	+ Security
Add/edit jobs		1	1	1	1
View jobs	/	1	1	1	1
Library	View	Review	Full	Admin	+ Security
View library		1	1	1	1
Upload files to library		1	✓	1	✓
Add/edit library cards		/	/	/	✓
Add new library folder (i.e., document type)		1	1	1	1
Edit existing library folder (i.e., document type)		/	1	1	✓
Multi-Project Card Report	View	Review	Full	Admin	+ Security
Search across multiple projects	/	1	/	√	✓
Bulk download active (main) files	/	1	/	1	/
Bulk download secondary/native files	/	/	/	/	✓
Bulk download comment files	1	/	/	✓	/
Generate & download CSV report	/	/	/	/	1
Set expected date			/	/	/

Add/edit other lists View other lists View Review Full Admin Securit	Create private filter set	✓	/	/	/	/
Add/edit other lists Image: Company of the company of th	Create public filter set	1	1	1	1	1
View other lists View Review Full Adental Security Prices and Estimates View Review Full Adental Security Manage Prices & Estimates on project View Review Full Admin Security Set default prices View Review Full Admin Security View list of projects ("with access given) View Review Full Admin Security Download list of projects ("with access given) View Review Full Admin Security Project Templates View Review Full Admin Security Edit in project Image: Add/edit own project fields templates View Review Full Admin Security View project (card list, code list, equipment list, etc.) View Project (admin, admin View Card list, code list, equipment list, etc.) View Project list View Review Full Admin Security Felit project (card list, code list, equipment list, etc.) View Card states View Card state View	Other Lists	View	Review	Full	Admin	+ Securit
Prices and Estimates	Add/edit other lists			1	/	1
Manage Prices & Estimates on project Set default prices Yew Review Full Admin Securit Secu	View other lists			1	1	/
Set default prices	Prices and Estimates	View	Review	Full	Admin	+ Securit
Project List	Manage Prices & Estimates on project			1	1	1
View list of projects ("with access given) V					/	/
View list of projects ("with access given) V	Project List	View	Review	Full	Admin	+ Securit
Download list of projects ('with access given)		1	1	1	/	/
Project Templates		/	/	/	/	
Edit in project Image: Company of the project fields templates Image:		View	Review	Full	Admin	+ Securit
Add/edit own project fields templates Image: Complex of the complex of				1	1	1
Add/edit all project fields templates				/	/	/
Projects View project (card list, code list, equipment list, etc.) View project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project (card list, code list, equipment list, etc.) View Project Med list Project Metrics report View Review Pull Admin Project Project Metrics report View (generate) Project Metrics report View Review Pull Admin Project Project Project Metrics report View (generate) Project Metrics report View Review Pull Admin Project Proport View Review Pull Admin Project Project Project Metrics report View Review Pull Admin Project Pro					/	/
View project (card list, code list, equipment list, etc.) V		View	Review	Full	Admin	+ Securit
Edit project (card list, code list, equipment list, etc.) Image: content project proje	•	1	/	1	/	1
Create project View Review Full Admin + Securit Edit card states View Review Full Admin + Securit Edit card states View Review Full Admin + Securit View card states View Review View Review Full Admin + Securit Re-assign obsolete cards View Review Full Admin + Securit View list of projects (dashboard/list/search) View Review Full Admin + Securit Add/edit peries View queries list View Review Full Admin + Securit Add/edit queries View queries list View Review Full Admin + Securit Add/edit relationships View relationships View Review Full Admin + Securit Add/edit relationships View Review Full Admin + Securit Add/edit relationships View Review Full Admin + Securit						
Projects (Additional Actions) View Review Full Admin + Securit Edit card states 7				/	/	/
Edit card states View carc states View carc states View carc states View carc st		View	Review	Full	Admin	+ Securit
View card states V V V V Process card to unit changes 0 V V V Re-assign obsolete cards View Review Full Admin *Securi Project List View Review Full Admin *Securi View list of projects (dashboard/list/search) View Review Full Admin *Securi Add/edit queries View Review Full Admin *Securi Add/edit queries View Queries list View Review Full Admin *Securi Add/edit queries View Queries list View Review Full Admin *Securi Add/edit queries View Review Full Admin *Securi Add/edit queries View Review Full Admin *Securi Add/edit queries View Review Full Admin *Securi Add/edit queries View Review Full Admin *Securi Add/edit queries	•			1	1	/
Process card to unit changes Re-assign obsolete cards View Review Full Admin *Securi Add/edit queries View queries List View queries List View queries list Add/edit queries View queries list Add/edit relationships View queries list View queries list View queries list Add/edit relationships View queries list View queries View queries list View queries l		/	/	/	/	/
Re-assign obsolete cards Project List View Review Full Admin + Securit View list of projects (dashboard/list/search) Queries List View Review Full Admin + Securit Add/edit queries View queries list Relationships View Review Full Admin + Securit Add/edit relationships View Review Full Admin + Securit Add/edit relationships View Review Full Admin + Securit View (generate) Project Metrics report View (generate) Project Metrics report View (generate) Assignment Activity report Routing Actions (System Level) View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View Review Full Admin + Securit View Open actions View Review Full Admin + Securit View Open Admin + Securit View Review Full + Admin + Securit View Review Full + Admin + Securi				/	/	/
Project List View list of projects (dashboard/list/search) View Review Review Full Admin + Security Queries List View Review Full Admin + Security Add/edit queries View Queries list View Review Full Admin + Security Add/edit queries View Review Full Admin + Security Add/edit relationships View Review Full Admin + Security Add/edit relationships View Review Full Admin + Security View (generate) Project Metrics report View Review Full Admin + Security View (generate) Project Metrics report View Review Full Admin + Security View (generate) Assignment Activity report View Review Full Admin + Security View open actions (System Level) View Review Full Admin + Security View open actions View Review Full Admin + Security View open actions View Review Full Admin + Security View open actions View Review Full Admin + Security View open actions View Review Full Admin + Security View open actions View Review Full Admin + Security View open actions View Review Full Admin<	-				/	/
View list of projects (dashboard/list/search) J </td <td></td> <td>View</td> <td>Review</td> <td>Full</td> <td>Admin</td> <td>+ Securit</td>		View	Review	Full	Admin	+ Securit
Queries List View Review Full Admin + Securi Add/edit queries		/	/	1	/	
Add/edit queries View queries list Relationships View Review Full Admin *Securi View (generate) Project Metrics report View (generate) Project Metrics report View (generate) Assignment Activity report Routing Actions (System Level) View open actions View Review Full Admin *Securi View open actions View Open actions View Review Full Admin *Securi View open actions View Open actions View Open actions View Review Full Admin *Securi View open actions View Open actions View Open actions View Review Full Admin *Securi View open actions View Open actions View Review Full Admin *Securi View Open Open Open Open Open Open Open Open		View				+ Securit
View queries list View Review Full Admin + Securit Add/edit relationships View relationships View Review Full Admin + Securit View relationships View Review Full Admin + Securit Reports View (generate) Project Metrics report View (generate) Admin + Securit View (generate) Assignment Activity report View Review Full Admin + Securit View open actions View Review Full Admin + Securit View open actions View View View View View View View View View View View View View					/	/
Relationships View Review Full Admin + Securi Add/edit relationships J J J J View relationships J J J J Reports View Review Full Admin + Securi View (generate) Project Metrics report J J J J View (generate) Assignment Activity report J J J J Routing Actions (System Level) View Review Full Admin + Securi View open actions J J J J J Download files J J J J J Download CSV report J J J J J Complete actions J J J J J Assign action on any card J J J J Assign action on card they are assigned to J J J J Routing Scenario View Review Full Admin + Securi Stage Lists View Review Full Admin + Securi Create/manage on project J J J J J	•				/	/
Add/edit relationshipsJJJView relationshipsJJJJReportsViewReviewFullAdmin+ SecuriView (generate) Project Metrics reportJJJView (generate) Assignment Activity reportJJJRouting Actions (System Level)ViewReviewFullAdmin+ SecuriView open actionsJJJJDownload filesJJJJDownload CSV reportJJJJComplete actionsJJJJAssign action on any cardJJJJAssign action on card they are assigned toJJJJRouting ScenarioViewReviewFullAdmin+ SecuriSet routing scenario defaultsJReviewFullAdmin+ SecuriCreate/manage on projectJJJJCreate defaultsJJJJ		View	Review	Full	Admin	+ Securi
View relationships View Review Full Admin + Securi View (generate) Project Metrics report View (generate) Assignment Activity report View Review Full Admin + Securi Routing Actions (System Level) View Review Full Admin + Securi View open actions View open actions View View <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td></td<>						
Reports View (generate) Project Metrics report View (generate) Assignment Activity report View (generate) Assignment Activity report View Review Full Admin + Security Admin	·	/	/	/	/	/
View (generate) Project Metrics report J J J View (generate) Assignment Activity report J J J J Routing Actions (System Level) View Review Full Admin + Security View open actions J	·	View	Review	Full	Admin	+ Securit
View (generate) Assignment Activity report View Review Full Admin + Security View open actions View open acti				1	1	/
Routing Actions (System Level) View Review Full Admin + Security View open actions V						
View open actions J J J J Download files J J J J Download CSV report J J J J Complete actions J J J J Assign action on any card J J J Assign action on card they are assigned to J J J Routing Scenario View Review Full Admin + Securi Set routing scenario defaults J J J Stage Lists View Review Full Admin + Securi Create/manage on project J J J Create defaults J J J		View	Review			+ Securi
Download files \(\forall \fo						
Download CSV report Complete actions Assign action on any card Assign action on card they are assigned to Routing Scenario Set routing scenario defaults Stage Lists View Review Full Admin + Securi Create/manage on project Create defaults Type View Review Full Admin Create defaults Full Admin Create defaults	·					
Complete actions Assign action on any card Assign action on card they are assigned to Routing Scenario Set routing scenario defaults Stage Lists View Review Full Admin +Securi Create/manage on project Create defaults View Review Full Admin +Securi View Review Full Admin +Securi Create defaults						
Assign action on any card Assign action on card they are assigned to Routing Scenario View Review Full Admin +Securi Set routing scenario defaults Stage Lists View Review Full Admin +Securi Create/manage on project Create defaults		•				
Assign action on card they are assigned to Routing Scenario View Review Full Admin +Securi Set routing scenario defaults Stage Lists View Review Full Admin +Securi Create/manage on project Create defaults	·		•			
Routing ScenarioViewReviewFullAdmin+ SecurionSet routing scenario defaultsJJStage ListsViewReviewFullAdmin+ SecurionCreate/manage on projectJJCreate defaultsJJ			./			
Set routing scenario defaults J Stage Lists View Review Full Admin + Securi Create/manage on project J J J Create defaults J J J		View				
Stage ListsViewReviewFullAdmin+ SecuriCreate/manage on project✓✓✓Create defaults✓✓✓			Review	- Tall		
Create/manage on project		View	Review	Full		
Create defaults			Review			
				V		
	Edit/delete defaults				/	/

Submittals	View	Review	Full	Admin	+ Security
Make submittals			1	1	1
Supplier Portal	View	Review	Full	Admin	+ Security
Add/edit sub-supplier accounts				1	1
View sub-supplier accounts				1	1
Support Access	View	Review	Full	Admin	+ Security
Allow support access			1	1	1
Templates	View	Review	Full	Admin	+ Security
Upload templates to company profile			1	1	1
Add/edit own templates			1	1	1
Add/edit all templates				1	1
User Management	View	Review	Full	Admin	+ Security
Edit own user	✓	1	1	1	1
Edit own user Add/edit/delete users	✓ ·	✓	√	<i>J</i>	✓ ✓
	/	/	/		
Add/edit/delete users	✓ ————————————————————————————————————	<i>J</i>	<i>J</i>		/
Add/edit/delete users Reactivate inactive users	✓ ————————————————————————————————————	✓ 	✓ 	✓	<i>y</i>
Add/edit/delete users Reactivate inactive users View user list	✓ ————————————————————————————————————	✓	✓	✓	\frac{1}{\sqrt{1}}
Add/edit/delete users Reactivate inactive users View user list Change own user email (if SSO)	\frac{1}{2}	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \		✓	<i>J J J</i>
Add/edit/delete users Reactivate inactive users View user list Change own user email (if SSO) Change own affiliate(s)	View	Review	Full	✓	\frac{1}{1}
Add/edit/delete users Reactivate inactive users View user list Change own user email (if SSO) Change own affiliate(s) Change own role				<i>y</i>	/ / / / /



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.