## **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						1
Authentication		View	Review	Full	Admin	+ Security
Enable MFA (for users and/or submittal recipients)						1
Enable requirement for submittal recipient authentication						/
Enable MFA for submittal recipients on project (when required at admin)				1	1	✓
Disable MFA for subm admin)	Disable MFA for submittal recipients on project (when required at admin)					1
View authentication lo	g					✓
Download data from a	Download data from authentication log					✓
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	1
Profile	View company	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	1
Doc codes	View doc code list for customer (admin)	1	1	1	1	1
Doc codes	View doc code list for affiliate	/	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	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
Return status	View return status list for affiliate			1	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	5	View	Review	Full	Admin	+ Security
Add/edit compilation and package presets (system)					1	1
Add/edit compilation and package presets (on project)				1	1	1
Contacts		View	Review	Full	Admin	+ Security
Add/edit contacts				1	1	1
View contacts (full lis	t)	1	1	1	1	1
Custom Fields		View	Review	Full	Admin	+ Security
Add custom equipme				1	1	1
Add custom equipme					/	1
Add custom doc code					✓	1
Add/edit project main				1	/	/
Add/edit library card					/	/
Add/edit custom lists					/	/
Set (add) custom leve	els defaults				1	1
Customization		View	Review	Full	Admin	+ Security
Change labels (for pro	oject, etc.)				/	/
Distribution Lists	• •	View	Review	Full	Admin	+ Security
Create/manage (on p				/	/	<b>/</b>
Create/manage from	admin	View	Davison	Full	√ A dusin	√ Carwit
eSignature  Manage instance eSig	anaturo cottingo	view	Review	Full	Admin	+ Securit
Sign documents	gnature settings		/	/	/	/
View documents pen	ding signature		/	/	/	/
Expedite Projects	unig signature	View	Review	Full	Admin	+ Security
Configure expedite re	eport for projects			1	1	1
Generate expedite requests				/	1	/
View expedite list				1	1	1
View expedite report configuration (on project)		1	1	/	1	1
View expedite log (history of sent)				/	1	/
Generation Status		View	Review	Full	Admin	+ Securit
View document generation statuses				1	1	✓
Jobs		View	Review	Full	Admin	+ Securit
Add/edit jobs			1	1	1	1
View jobs		1	/	/	/	1
Library		View	Review	Full	Admin	+ Securit
View library			<b>✓</b>	1	1	/
Upload files to library			<b>✓</b>	1	<b>√</b>	1
Add/edit library card			<b>✓</b>	1	<b>√</b>	1
Add new library folder (i.e., document type)			<b>✓</b>	1	<b>√</b>	1
Edit existing library for	older (i.e., document type)		✓	✓	✓	/

Multi-Project Card Report	View	Review	Full	Admin	+ Security
Search across multiple projects	/	1	1	1	1
Bulk download active (main) files	/	/	/	/	/
Bulk download secondary/native files	/	/	/	/	/
Bulk download comment files	/	1	/	1	1
Generate & download CSV report	/	/	/	/	1
Set expected date			1	1	/
Create private filter set	<b>✓</b>	1	/	1	1
Create public filter set	/	/	✓	/	1
Other Lists	View	Review	Full	Admin	+ Security
Add/edit other lists			/	1	1
View other lists			1	1	1
Prices and Estimates	View	Review	Full	Admin	+ Security
Manage Prices & Estimates on project			✓	/	1
Set default prices				1	1
Project List	View	Review	Full	Admin	+ Security
View list of projects (*with access given)	<b>✓</b>	/	/	/	<b>✓</b>
Download list of projects (*with access given)	✓ <u> </u>	/	<b>√</b>	1	
Project Templates	View	Review	Full	Admin	+ Security
Edit in project			/	✓ ·	<i></i>
Add/edit own project fields templates			/	✓ /	<i>\</i>
Add/edit all project fields templates	View	Review	Full	Admin	+ Security
Projects View project (card list, code list, equipment list, etc.)	View ✓	Review	ruii ✓	Admin /	+ Security
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			1	1	1
View card states	/	/	/	/	1
Process card to unit changes			1	1	1
Re-assign obsolete cards			/	1	1
Project List	View	Review	Full	Admin	+ Security
View list of projects (dashboard/list/search)	1	1	1	1	
Queries List	View	Review	Full	Admin	+ Security
Add/edit queries				1	1
View queries list				1	1
Relationships	View	Review	Full	Admin	+ Security
Add/edit relationships			✓	/	1
View relationships	1	1	1	1	<b>√</b>
Reports	View	Review	Full	Admin	+ Security
View (generate) Project Metrics report			/	/	✓
View (generate) Assignment Activity report			<b>√</b>	/	<b>√</b>
Routing Actions (System Level)	View	Review	Full	Admin	+ Security
View open actions	<i>\</i>	1	/	<b>✓</b>	<b>√</b>
Download files	/	/	/	/	1

Download CSV report	1	1	1	1	1
Complete actions		1	/	/	/
Assign action on any card			1	1	1
Assign action on card they are assigned to		1	1	1	1
Bulk re-assign action on any card				1	1
Bulk re-assign action on card they are assigned to		1	1	1	1
Routing Scenario	View	Review	Full	Admin	+ Security
Set routing scenario defaults				1	1
Stage Lists	View	Review	Full	Admin	+ Securit
Create/manage on project			1	1	1
Create defaults				1	1
Edit/delete defaults				1	/
Submittals	View	Review	Full	Admin	+ Securit
Make submittals			1	1	/
Supplier Portal	View	Review	Full	Admin	+ Securit
Add/edit sub-supplier accounts				1	1
View sub-supplier accounts				1	1
Support Access	View	Review	Full	Admin	+ Securit
Allow support access			1	1	✓
Templates	View	Review	Full	Admin	+ Securit
Upload templates to company profile			1	1	1
Add/edit own templates			1	1	/
Add/edit all templates				1	1
User Management	View	Review	Full	Admin	+ Securit
Edit own user	/	1	1	1	1
Add/edit/delete users				1	1
Reactivate inactive users					1
View user list				1	1
Change own user email (if SSO)					1
Change own affiliate(s)					1
Change own role					1
User Permissions	View	Review	Full	Admin	+ Securit
View user permissions				1	1
Edit user permissions				1	1



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.