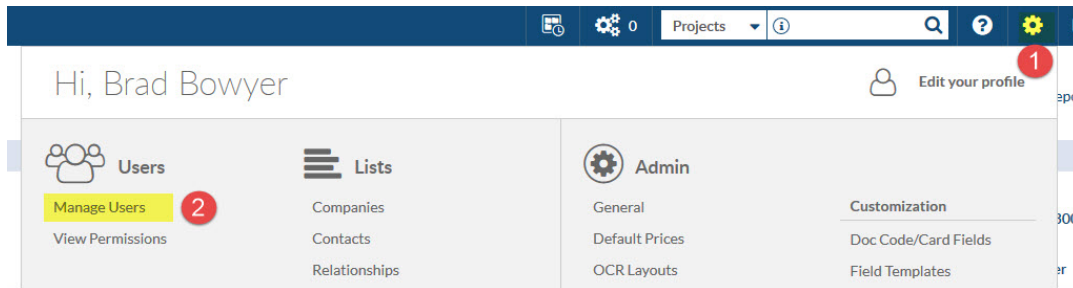


Manage Users

10/02/2025 2:31 pm MDT

Admin users can manage their instance's user list from the **Manage Users** screen.

From the **Instance Menu**, select **Manage Users** to navigate here.



Manage Users

Users
Manage Users

Colour	Login	Name	Role	Receive outstanding actions report	Receive outstanding actions alert	Receive internal approval actions alert	Security Permission	Commercial Contact	Technical Support Access	Tools
Yellow	brad@id...	Brad Bo...	admin	N	N	N	Y	Y	Y	[Edit] [Delete]
Green	brad+vi...	Jessica J...	admin	N	N	N	N	N	N	[Edit] [Delete]
Red	brad+re...	Lisa Sim...	reviewer	N	N	N	N	N	N	[Edit] [Delete]
Purple	brad+re...	Peter Pa...	reviewer	N	N	N	N	N	N	[Edit] [Delete]

From the **Manage Users** screen, admin users can:

1. Manually initiate the sending of outstanding action report
2. View whether Extended Support is available, and how many Technical Support users are assigned/available
3. View the number of available/used licenses for the instance
4. Add users
5. View existing users
6. Edit user permissions
7. Edit user settings
8. Designate the Commercial Contact (the user responsible for the contract with DocBoss - see article: [Set Commercial Contact](#))
9. Designate users with Technical Support access (the user(s) that have been selected for correspondence with the DocBoss support team)

The user list can be filtered by [affiliates](#). The filtering can be applied based on primary affiliate, project access, or

library access to the selected affiliate.

Users

Manage Users

User accounts

Filter by affiliate

Wolfe Instruments

✕

▼

where user relationship is

☒ Primary

☐ Project

☐ Library

Tools		Primary Affiliate	Role	Security Permission	Receive outstanding actions report
	Wolfe CA				
	Wolfe Instruments	Instruments	admin	Y	N
	Wolfe Instruments	Instruments	admin	Y	N
	Wolfe Systems	Instruments	reviewer	N	N

Licenses per affiliate

For information about license allotment per affiliates, see [this article](#).

Add/Edit users

Information about adding, editing, and reactivating users is available [here](#).

User permissions

Information about setting/managing user permissions is available [here](#).
