Add Users / Edit / Disable Users

09/12/2024 2:39 pm MDT

How to get here:

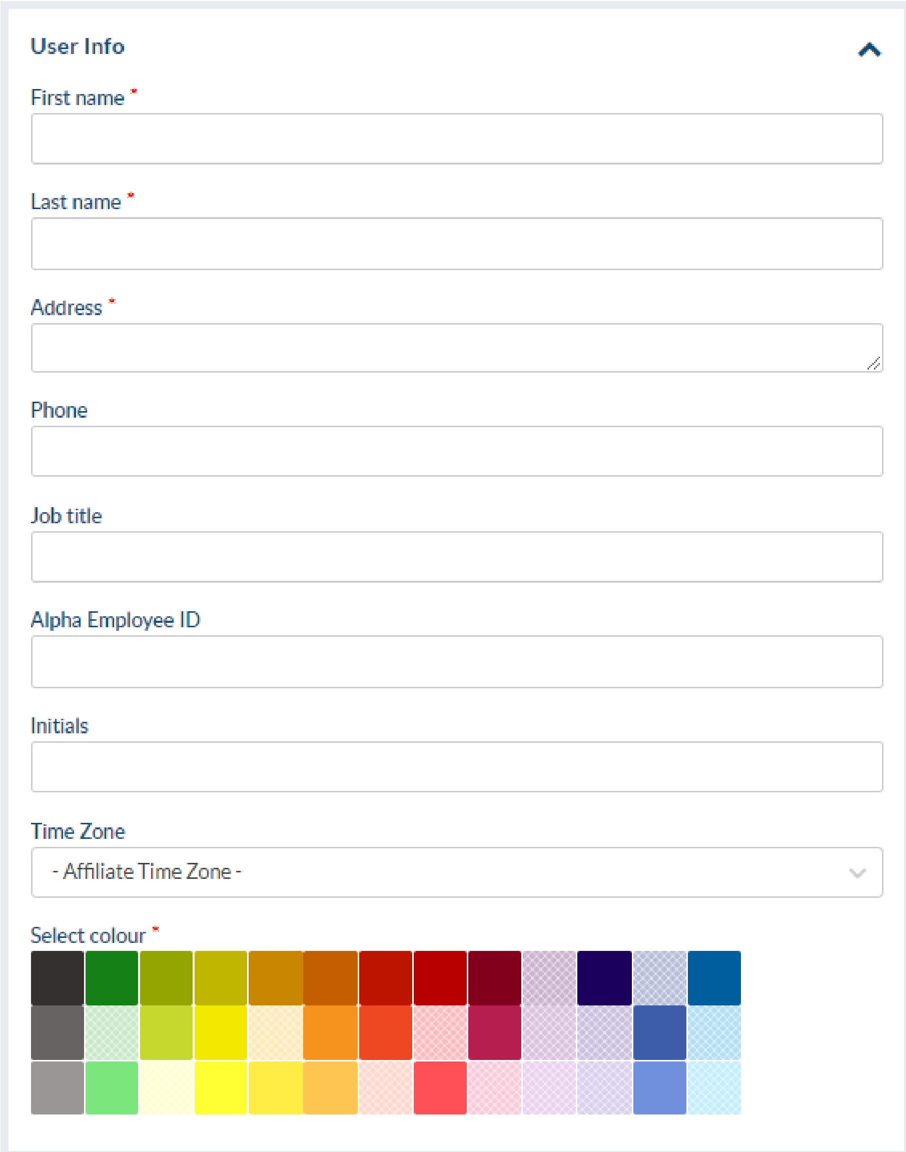
These options are only available from the Manage Users screen.

- **To Add**: Above the grid, click Add User.
- **To Edit**: Click the edit icon (tools column) for the specific user.
- **To Disable**: Click the disable icon.
- **To Reactivate**: Set "Inactive Accounts" to SHOW and select the reactivate icon (under the Tools column) for the applicable users. The Security permission is required to complete this function.

Add User

Add the basic information for the user. All users must represent a single person.

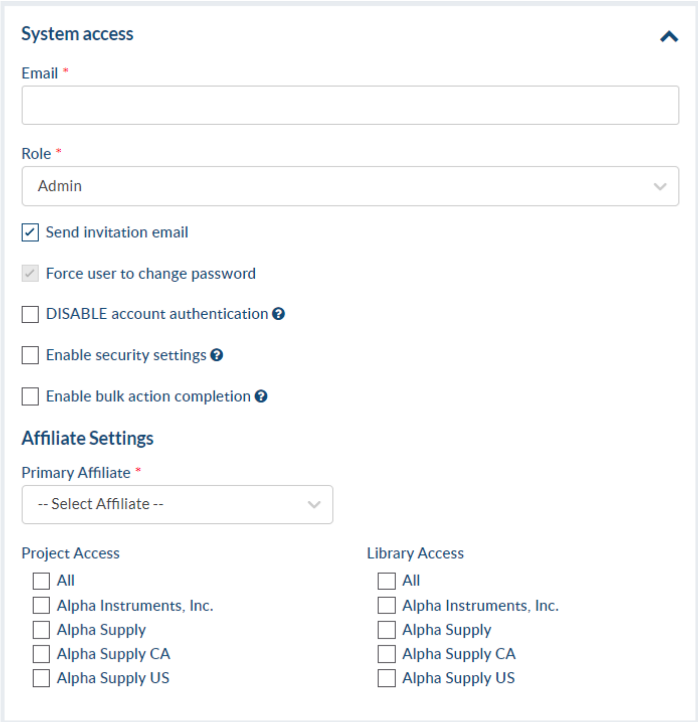
Select Colour: All markups by this user will appear in the selected color. The squares with a white person icon are in use by other users.



System Access

We suggest entering the users email address as the **Login name** to ensure it is unique.

Roles are already established. If you need more information about what each role means you can find it in Definition of the Roles.



Only Admin users can change user email addresses.

Affiliate Settings

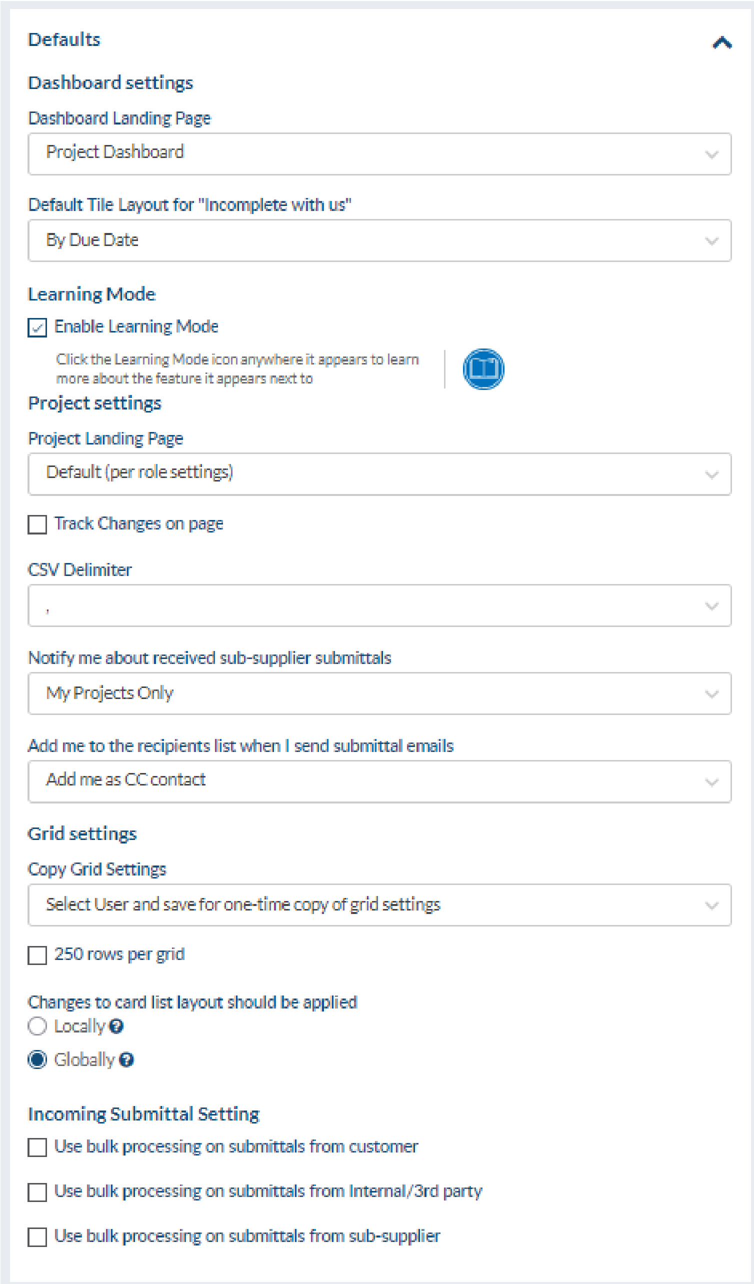
If using affiliates, access per affiliate can be configured when setting up a new user, or changed for existing users. For more information, see Enable Affiliate Permissions for a User.

When upgrading a user role to full, affiliate permissions will be removed, and must be added back. Note that an admin user can only add affiliates to which they also have access. Admin users with the security permission have full access to add all affiliates.

On downgrade (from full to review/view), affiliates are not affected.

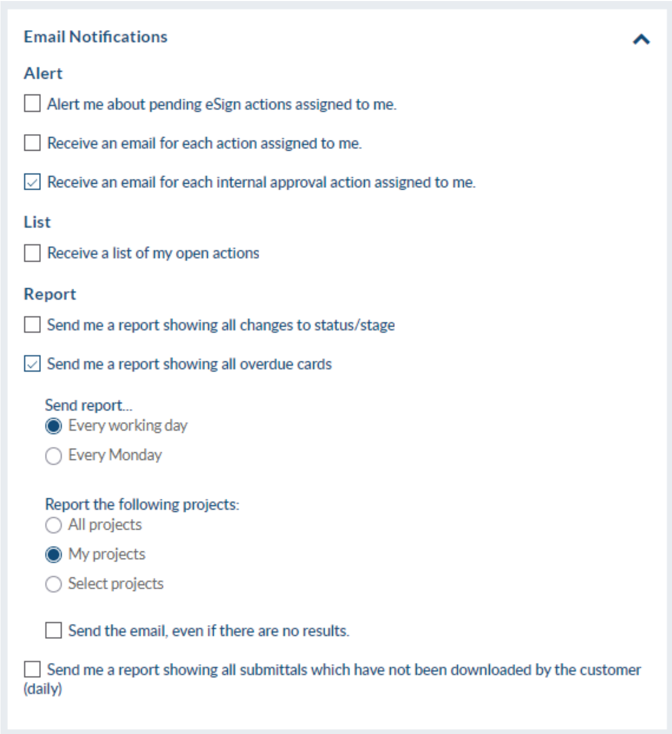
Default User settings

Edit the behaviour for various system settings. In many cases, these settings are defaulted from your role, but can be overridden in this section.



Email Notifications

Enable/disable the automated emails which are sent from DocBoss. Additional options appear for some of the settings.



Warnings

You may choose to disable some standard system warnings if you find them to be a nuisance.