Add Users / Edit / Disable Users

10/20/2026 4:20 pm MDT

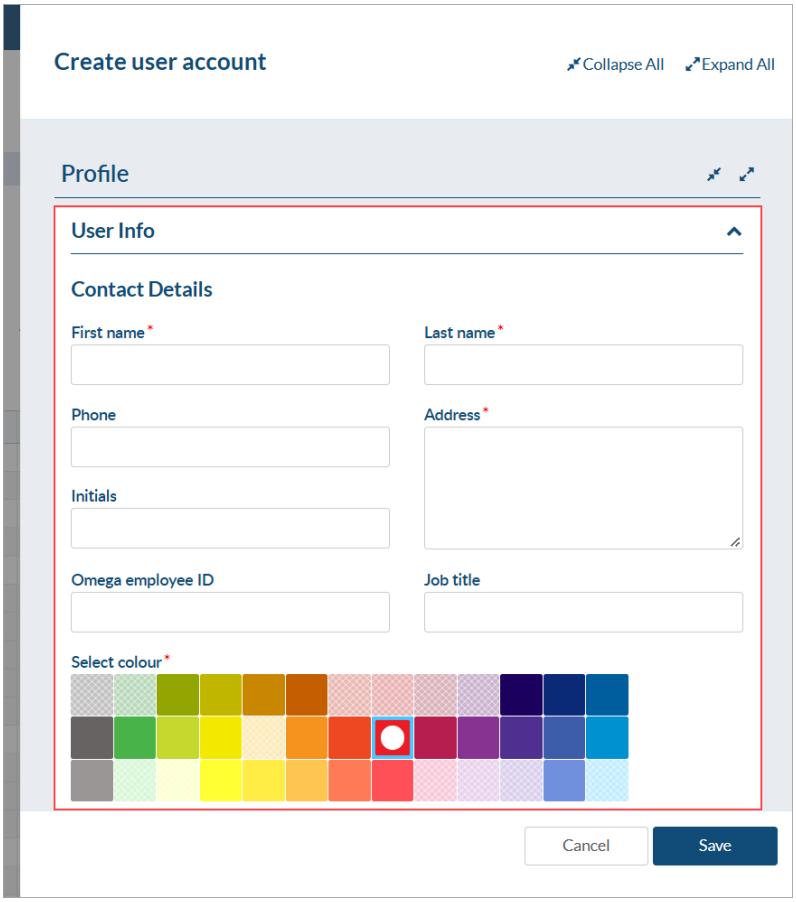
To begin managing DocBoss users, navigate to **System Menu > Users > Manage Users.**

These options available from the Manage Users screen are to:

- **Add**: Above the grid, click "**+ Add**" and follow the steps below.
- **Edit**: Click the pencil icon (under "Tools") for the specific user.
- **Inactivate**: Click the inactivate icon (under "Tools") for the specific user.
  - Note: If an inactivated user is involved in document review, their incomplete actions (and their involvement in routing scenarios) will remain. Before inactivating, be sure to reassign their actions and replace them in routing scenarios.
- **Reactivate**: Set "Inactive accounts" to SHOW and select the enable icon (under "Tools") for the specific user.
  - Note: The security permission is required to complete this function.

Add User

Add the basic information for the user in the **Profile** section. All users must represent a single person.

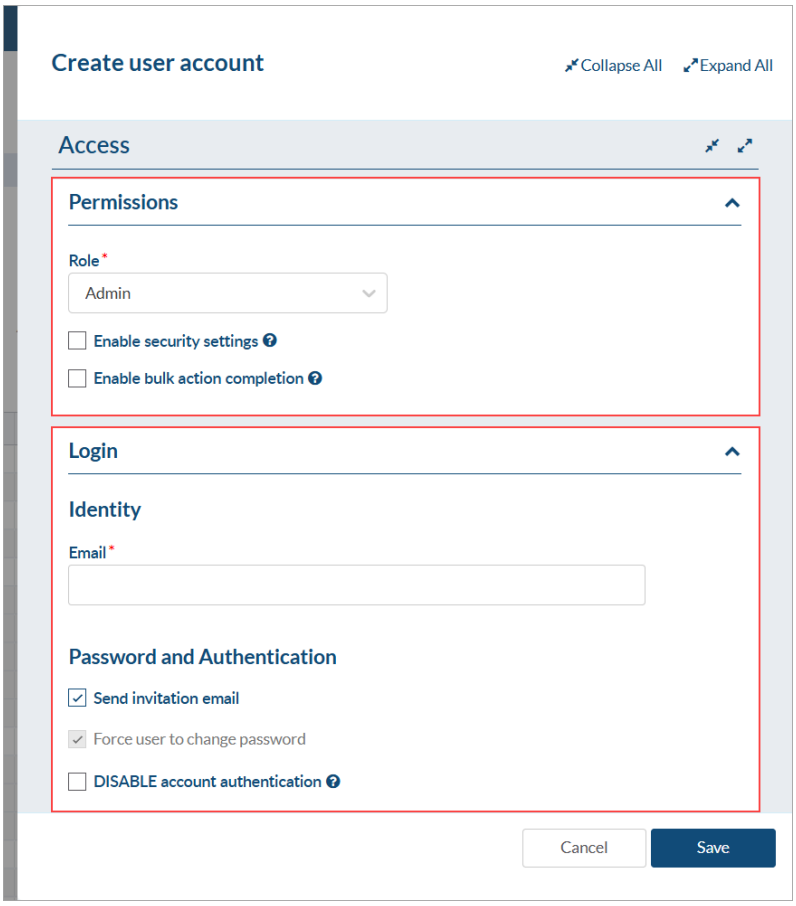


Select colour: All markups by this user will appear in the selected colour. The colours with a grid pattern are in use by other users.

Access

Select the user's license type as their **Role**. See this article for details about each license type: User Roles.

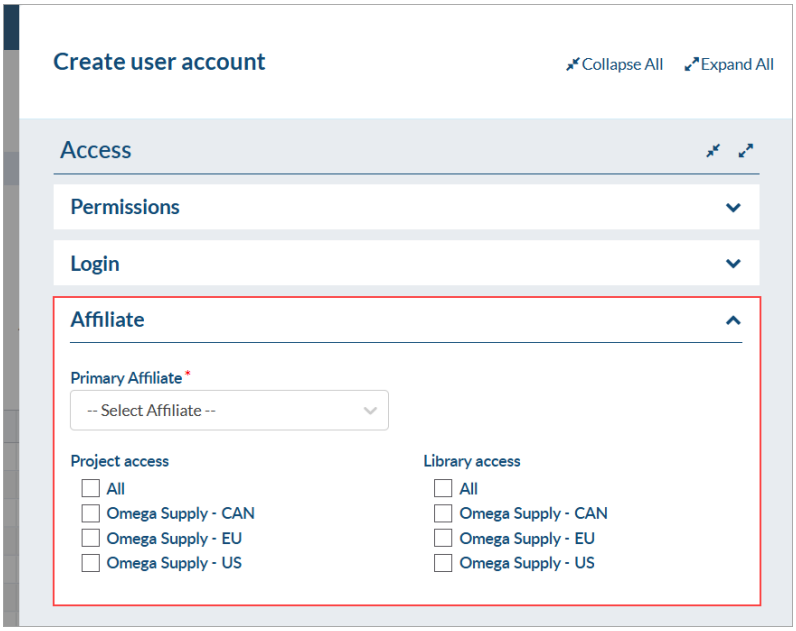
Enter their email address in the **Login** section. Once added, choose to either send an invitation email to the new user (where they can set up their own password), or set a password for them (by unchecking "Send invitation email").



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.

If upgrading a user's role, 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 (but an Admin user with the security permission can add all affiliates). If downgrading a user's role, affiliate settings remain as-is.



Notifications & Defaults

Edit the options for various system settings. For details on all available options, see this article: User Profile.

