

User Permissions

12/15/2025 4:33 pm MST

Permissions are managed from the **Manage Users** screen. Note that there is a **View Permissions** screen from the instance menu, but it is READ ONLY and is available to all user types.

To edit user permissions, navigate to **System Menu > Users > Manage Users**. From the grid, select the "Permissions" icon of the appropriate user

UsersManage Users

Send outstanding actions reports

User Accounts

Extended Support is N/A and Technical Support: 3 / 3

Keywords

Total Roles 15 / 26 Admin/Full 11 / 12 Reviewer 2 / 7 View 2 / 7

Filter by affiliate Select or type ahead... where user relationship is Primary Project Library Inactive accounts Show Add

Tools	ID	Colour	Login	Email	Role	Primary Affiliate	Job Title	Security Permission	Technical Support Access	Receive outstanding actions report
Permissions	192				admin	Wolfe Instruments	Coordinator	N	N	N
	19				admin	Wolfe Instruments	Admin	N	N	N
	151				admin	Wolfe Instruments	Admin	N	Y	N

Select page: alina@docboss.com - elena@docboss.com Show on page: 10

Excel Import/Export



Note: You must have admin permissions in order to edit the permissions of other users.

User specific permissions

Global permissions

These options control access to every occurrence of an object.



Example: If a user has **full** permissions to **projects** on the **Global** tab, then they will have full access to every project in the system.

IMPORTANT: Global permissions override the any specific permissions. If global permission are assigned, individual permissions are **not required**.

The available permission options are as follows:

All	An "auto-select" for all available permissions. If checked, all 7 options will be enabled.
Edit	Provides user with editing permissions (e.g., edit projects, contacts, companies, relationships, etc.).
Review	Provides user the ability to be involved in document review (including internal approval). Also provides ability to add signatures to documents.

