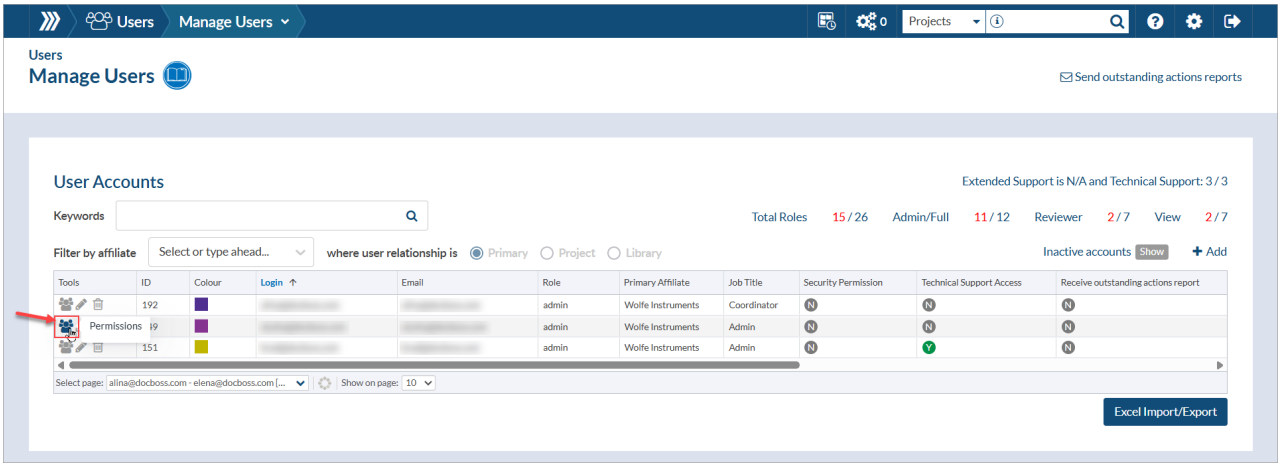
User Permissions

09/28/2026 9:45 am MDT

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



> **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.

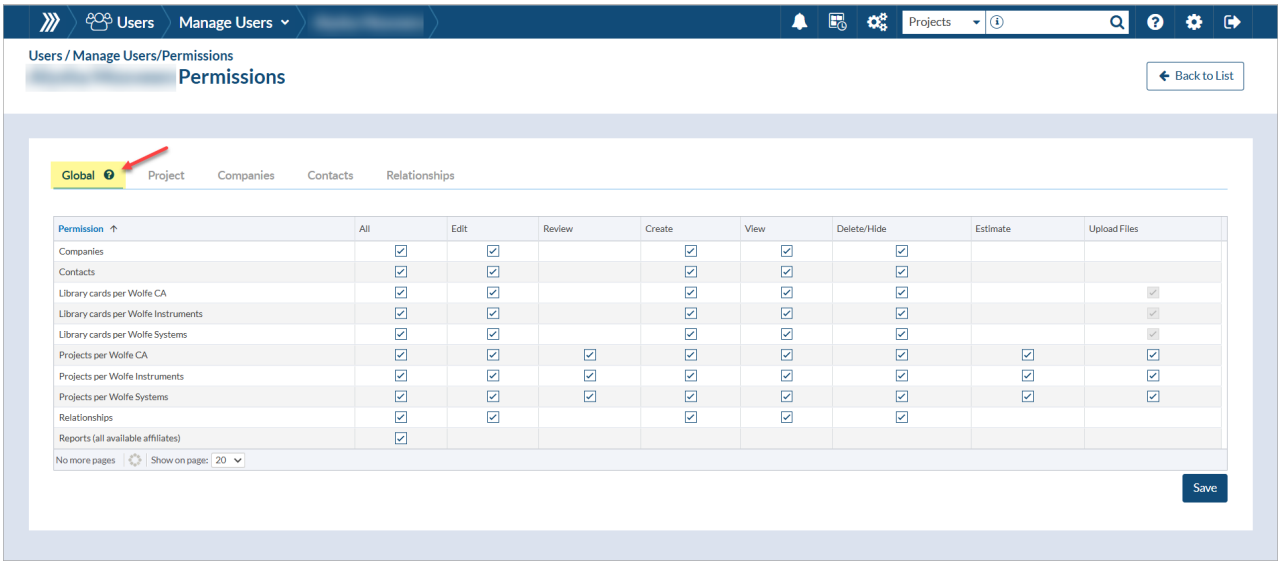
IMPORTANT: Global permissions **override** the any specific permissions. If global permission are assigned, individual permissions are **not required**.

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.

Create	Provides user the ability to create new items (e.g., initiate a project, add new contacts, add new companies, add new relationships, etc.).
View	Provides user with view-only permissions (e.g., view projects, contacts, companies, relationships, etc.)
Delete/Hide	Provides user the ability to hide and/or delete items (e.g., hide a project, disable a company, disable/delete a contact, etc.).
Estimate	Provides user the ability view estimates (i.e., quotes).
Upload Files	Provides user the ability to upload files to a project (see this article for more details: Can reviewer users upload files to DocBoss?). **Note: Also indicates ability to upload files to the **library**. If the user has "View" permissions to the library, they will have the ability to upload files by default.*

Note: A user's role will control the options available on the permissions screens. For example, a reviewer role cannot edit projects, so the **edit** option will not be available.



Global project permissions are defined PER AFFILIATE. For more information, see this article: Enable Affiliate Permissions for a User.

Individual permissions

Each of the other tabs contains a list. In each of the specific grids (i.e., Project, Companies, Contacts or Relationships), you can set permissions for each item in the list.

The available permission options are as follows:

Project

All	An "auto-select" for all available permissions. If checked, all 6 options will be enabled.
Edit	Provides user with editing permissions (e.g., edit card details, doc codes, etc.).

Review	Provides user the ability to be involved in document review (including internal approval). Also provides ability to add signatures to documents.
View	Provides user with view-only permissions (e.g., view card details, doc codes, etc.).
Delete/Hide	Provides user the ability to hide a project.
Estimate	Provides user the ability view estimates (i.e., quotes).
Upload Files	Provides user the ability to create new submittals and upload/assign files via Incoming Documents. If provided this permission, the user does not require a Full user role to perform these functions.
Confidential	Provides user with access to confidential projects (see article).

Companies

All	An "auto-select" for all available permissions. If checked, all 3 options will be enabled.
Edit	Provides user the ability to edit a company (e.g., profile information, add doc codes, update addresses, etc.).
View	Provides user the ability to view (but not edit) a company.
Delete/Hide	Provides user the ability to disable a company.

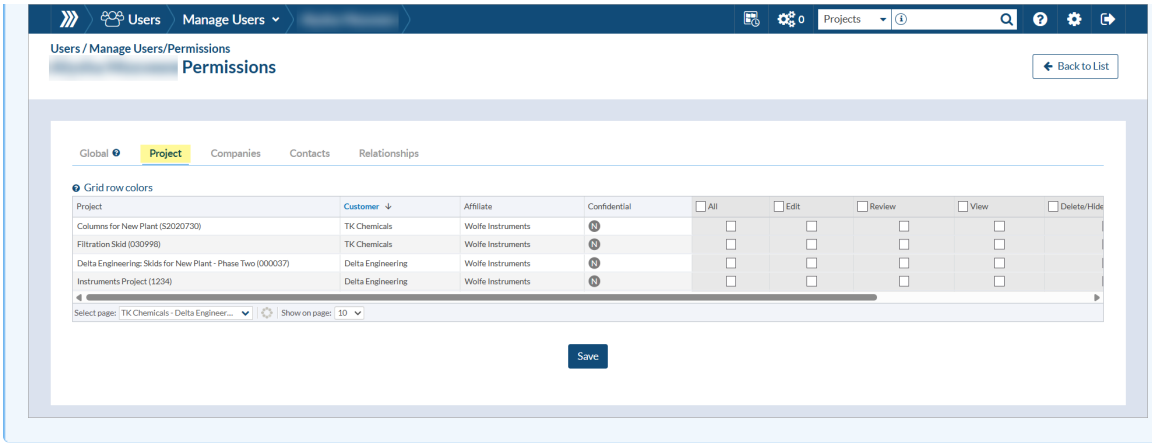
Contacts

All	An "auto-select" for all available permissions. If checked, all 3 options will be enabled.
Edit	Provides user the ability to edit a contact (e.g., first and last name).
View	Provides user the ability to view (but not edit) a contact.
Delete/Hide	Provides user the ability to disable and/or delete a contact.

Relationships

All	An "auto-select" for all available permissions. If checked, all 3 options will be enabled.
Edit	Provides user the ability to edit a relationship (e.g., change company, update job title, enable web access, etc.).
View	Provides user the ability to view (but not edit) a relationship.
Delete/Hide	Provides user the ability to disable and/or delete a relationship.

If the permission for the group (e.g., Projects) are being set at the global level, the individual permission options will be greyed out.


Users
Manage Users
Projects
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Permissions
Back to List
Global
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Companies
Contacts
Relationships
Grid row colors
Project
Customer
Affiliate
Confidential
All
Edit
Review
View
Delete/Hide
Columns for New Plant (S2020730)
TK Chemicals
Wolfe Instruments
Filtration Skid (030998)
TK Chemicals
Wolfe Instruments
Delta Engineering: Skids for New Plant - Phase Two (000037)
Delta Engineering
Wolfe Instruments
Instruments Project (1234)
Delta Engineering
Wolfe Instruments
Select page:
TK Chemicals - Delta Engineer...
Show on page:
10
Save