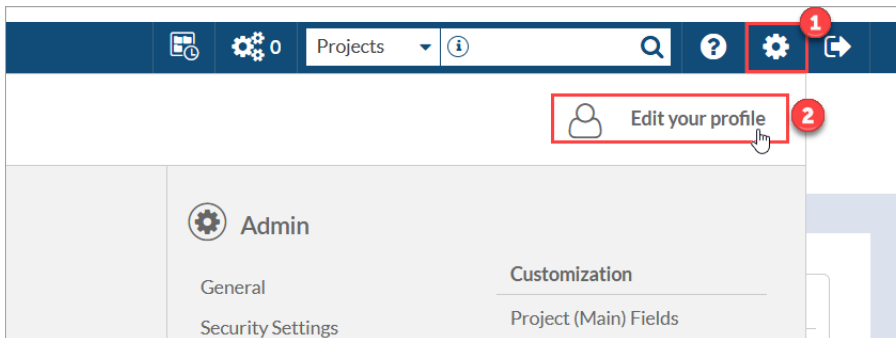


# User Profile

10/28/2025 4:14 pm MDT

The User Profile allows you to set specific values only for your user account, such as signature, landing page options, email notification and warnings messages.

**To get here:**



## Profile

## User Info

This tab contains basic information like your name, phone number, and address. All users must represent a single person.

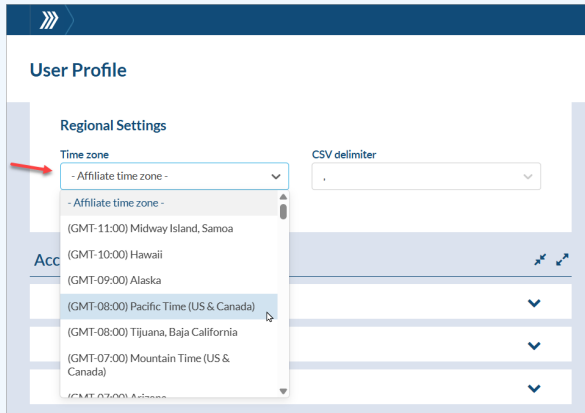
Select colour: All markups by this user will appear in the selected colour. The checkered squares indicate that the colour is in use by another user.

Any data fields with an asterisk (\*) are mandatory.

[illegible]



By default, the user's selected time zone will match the time zone set at Admin > General (i.e., instance time zone). If using [custom affiliate admin settings](#), the user's selected time zone will default to the time zone set for their primary affiliate. In either case, the user's selected time zone can be adjusted if desired.



## Access

### Permissions

Your administrator will have defined your role. For additional information on roles, check here: [User Roles](#).

Access to project-specific and detailed permissions can also be found here.

#### Permissions

Role \*

Admin (10 / 10)

For project-specific and detailed permissions, see [here](#)

☒ Enable security settings ?

☐ Enable bulk action completion ?

## Login

The users email address is the login value for system access.

Users may update/change their passwords from here.

Login

Identity

Login name \*

John Doe

Email \*

doe\_john@companyname.com

Password and Authentication

Current password

.....

New password

Must contain 10 letters, including a capital, a number, and a symbol.

Confirm new password

## Affiliate

For customers using Affiliates in DocBoss, by default, new users will get full access (still limited by their role type) to all affiliates that the user creating them has access to. The option to limit access to specific affiliates is only available under the **Edit** screen (available only after a new user is saved).

Affiliate

Primary Affiliate \*

Wolfe Instruments

Affiliate Address

Use Company Default Address

Project access

☒ All
 ☒ Wolfe CA
 ☒ Wolfe Instruments
 ☒ Wolfe Systems

Library access

☒ All
 ☒ Wolfe CA
 ☒ Wolfe Instruments
 ☒ Wolfe Systems

For more information, see [Enable Affiliate Permissions for a User](#).

## Signature and Certificates

### Outputs Signature

Sometimes customers request signatures or handwritten initials to be included on their cover sheets. Once uploaded, these files can be used on all the projects where this is required.

To create the files, you can either (1) bring over an HTML signature, or (2) simply sign a piece of paper, take a photo of it, and upload by dragging and dropping the images in the applicable field.

1

Email signature (html) ?

2

Your signature

Drag and drop new image

Or choose files from disk

Your initials

Drag and drop new image

Or choose files from disk

## eSignature

eSignatures allow you to apply a stamp of your signature onto documents. You can configure your eSignature certificate from here.

eSignature

Type

☒ Generate DocBoss certificate
 ☐ Upload externally generated certificate (coming soon...)

Certificate Details

Name \*

Email \*

Company

Wolfe Instruments

Organization unit

Country

Select or type ahead...

Generate

No certificate yet...

Generate Certificate

## Notifications

### System Notifications

User can choose whether to receive system notifications about all projects, or only those that they are involved with.

System Notifications

Notify me about received sub-supplier submittals

My projects only

All projects

My projects only

# Email Notifications

Enable/disable the automated emails which are sent from DocBoss.

Additional options appear for Lists and Reports where you can select your preferences.

Email Notifications

Alert

☒ Alert me about pending sign actions assigned to me

☒ Receive an email for each action assigned to me

☒ Receive an email for each internal approval action assigned to me

☒ Receive an email for new customer portal submittals

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

☒ Receive an email for new sub-supplier portal submittals

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

List

☐ Receive a list of my open actions

Report

☐ Send me a report showing all changes to status/stage

☐ Send me a report showing all overdue cards

☐ Send me a report showing all submittals which have not been downloaded by the customer (daily)

☐ Send me a report for each incoming customer submittal once all docs are assigned

☐ Send me a report for each incoming sub-supplier submittal once all docs are assigned

☐ Send me a report for each incoming Internal/Third-Party submittal once all docs are assigned

**Note for Admin users:** to make changes to the overdue cards report, see [Edit the Default Overdue Cards Report](#)

# Defaults

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

## Interface

### Project Dashboard

- **Dashboard landing page:** You can choose the first page that you want to see on your dashboard.
- **Default tile layout for "Incomplete with us":** You can choose whether to see these tiles by due date or by location
  - For more information about "Incomplete with us" in your project dashboard click go to [Project Dashboard Overview and Tile Layout](#).

### Projects

- **Project landing page:** Allows you to choose the first screen you see when accessing a project.
- **Track changes on page:** Keeps track of your changes in real-time, warning you if you try to leave the page without saving.

## Grids

- **Copy grid settings:** It is possible to copy all grid settings from another user. Generally only users when launching a new user.
- **250 rows per grid:** By default, the system shows a maximum of 100 rows per grid. This is generally to make page loading faster. The option exists to display up to 250 rows, but performance may suffer.
- **Changes to card layout should be applied:** Choose whether to apply card list layout changes globally or locally.

The screenshot shows the 'Interface' settings panel. It has a title bar 'Interface' with an upward arrow. The panel is divided into three sections: 'Project Dashboard', 'Projects', and 'Grids'. Under 'Project Dashboard', there is a 'Dashboard landing page' dropdown set to 'Project List' and a 'Default tile layout for "Incomplete with us"' dropdown set to 'By Due Date'. Under 'Projects', there is a 'Project landing page' dropdown set to 'Card list' and a checkbox 'Track changes on page' which is unchecked. Under 'Grids', there is a 'Copy grid settings' dropdown set to 'Select user and save for one-time copy of grid settings', a checkbox '250 rows per grid' which is unchecked, and a 'Changes to card list layout should be applied' dropdown set to 'Globally'.

## Submittals

Choose to allow bulk processing for incoming documents, and/or update whether you receive submittal emails sent through DocBoss.

The screenshot shows the 'Submittals' settings panel. It has a title bar 'Submittals' with an upward arrow. The panel is divided into two sections: 'Incoming' and 'Outgoing'. Under 'Incoming', there are three checkboxes: 'Use bulk processing on submittals from customer' (unchecked), 'Use bulk processing on submittals from Internal/3rd party' (unchecked), and 'Use bulk processing on submittals from sub-supplier' (unchecked). Under 'Outgoing', there is a section 'Add me to the recipients list when I send submittal emails' with a dropdown menu. The dropdown is open, showing four options: 'Add me as CC contact' (selected), 'Do not add', 'Add me as CC contact', and 'Add me as BCC contact'. There is a downward arrow at the bottom right of the panel.

## Warnings

Warnings are pop ups that show up in DocBoss. You may choose to disable some standard system warnings if you prefer.

## Warnings



### File Assignments

- ☒ Warn on assign: when chosen status is not complete, but no routing is defined

### Code List (Requirements)

- ☒ Warn on code list: when changing stage list (force user to type CHANGE)

### Compilation Layout

- ☒ Warn in compilation layout: when adding doc code with no required card
- ☒ Warn in compilation layout: when removing doc code

## Learning Mode

Learning mode is a quick and effective way to find information pertinent to the area of DocBoss you are in. You can choose to enable or disable the icons from appearing on your account.

## Learning Mode



- ☒ **Enable Learning Mode**

Click the Learning Mode icon anywhere it appears to learn more about the feature it appears next to

