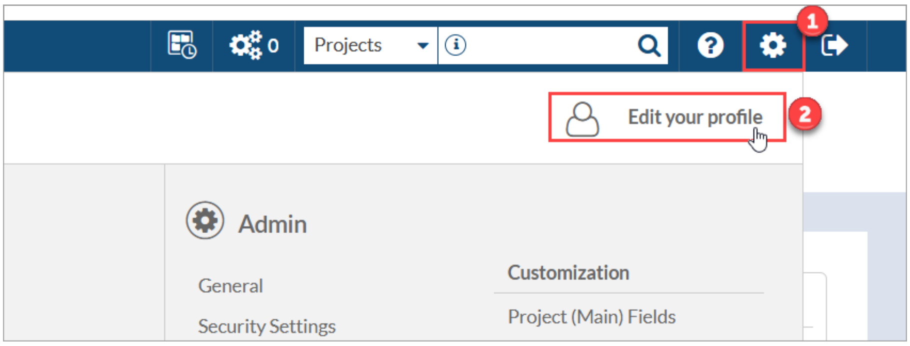
User Profile

09/08/2025 8:36 am 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:



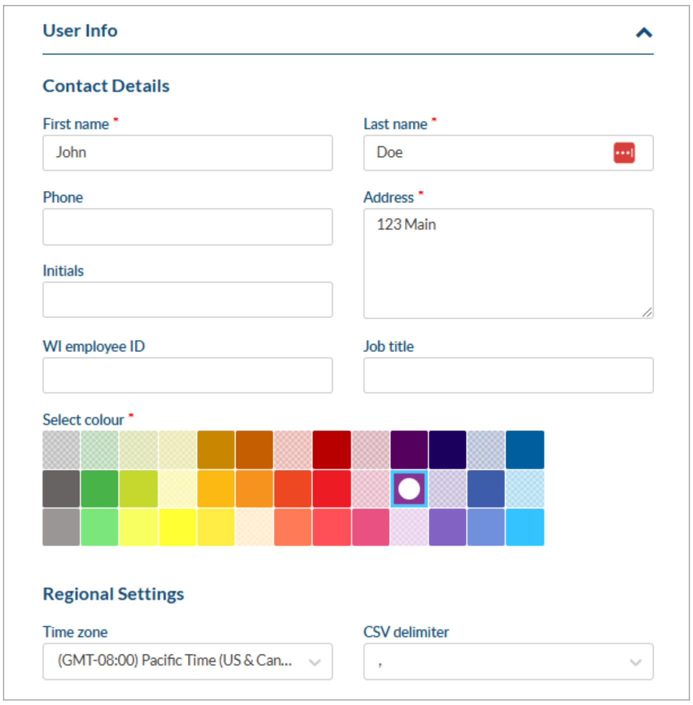
Profile

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.

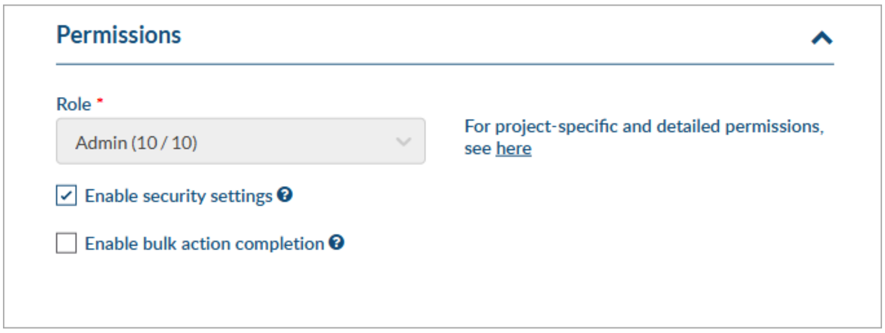


Access

Permissions

Your administrator will have defined your role. For additional information on roles, check here: User Roles.

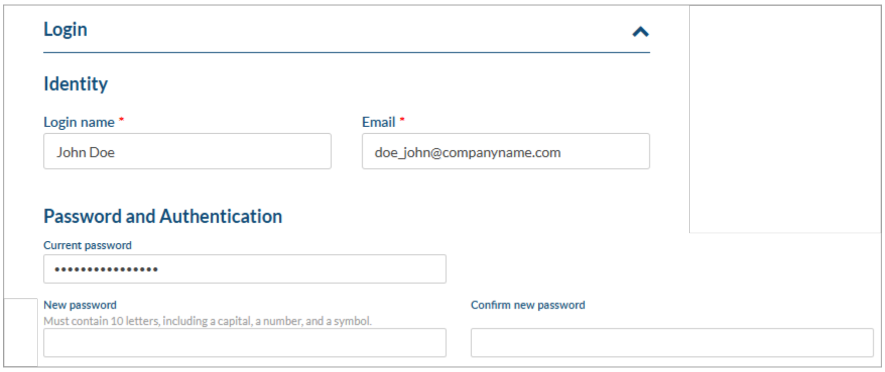
Access to project-specific and detailed permissions can also be found here.



Login

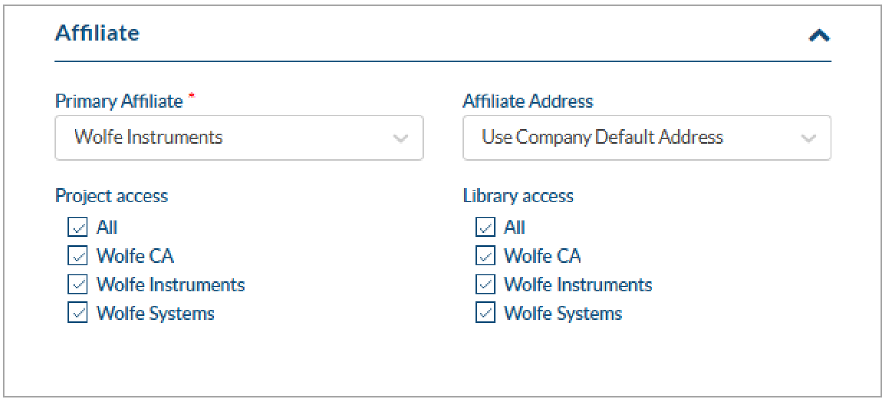
The users email address is the login value for system access.

Users may update/change their passwords from here.



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).



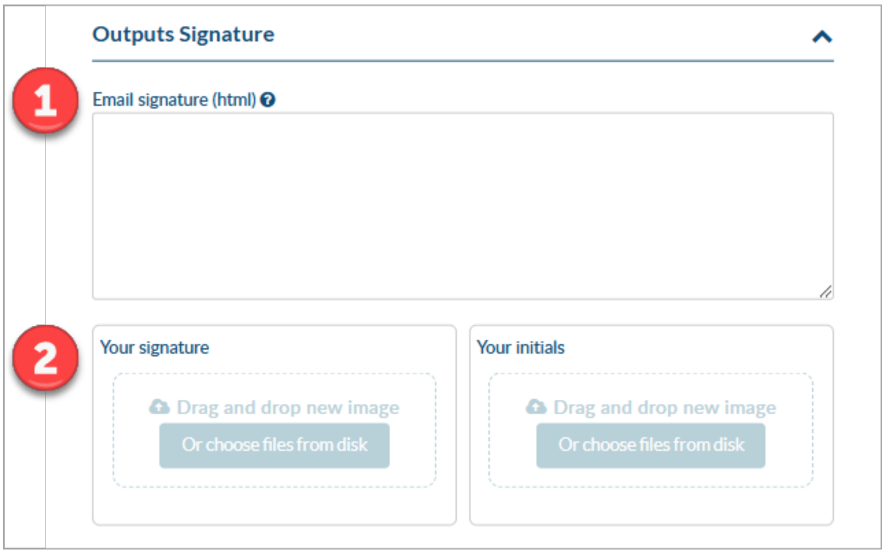
For more information, see Enable Affiliate Permissions for a User.

Signature and Certificates

Outputs Signature

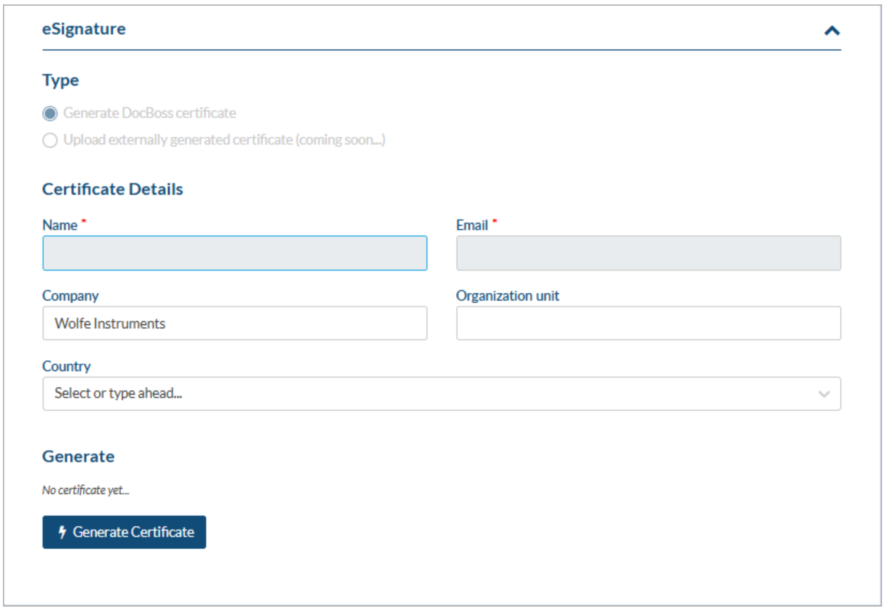
Sometimes customers request signatures or handwritten initials to be included on their cover sheets. Once uploaded, these files can be used on all the projects where this is required.

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.



eSignature

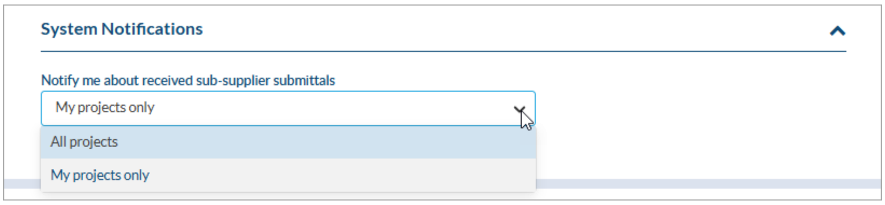
eSignatures allow you to apply a stamp of your signature onto documents. You can configure your eSignature certificate from here.



Notifications

System Notifications

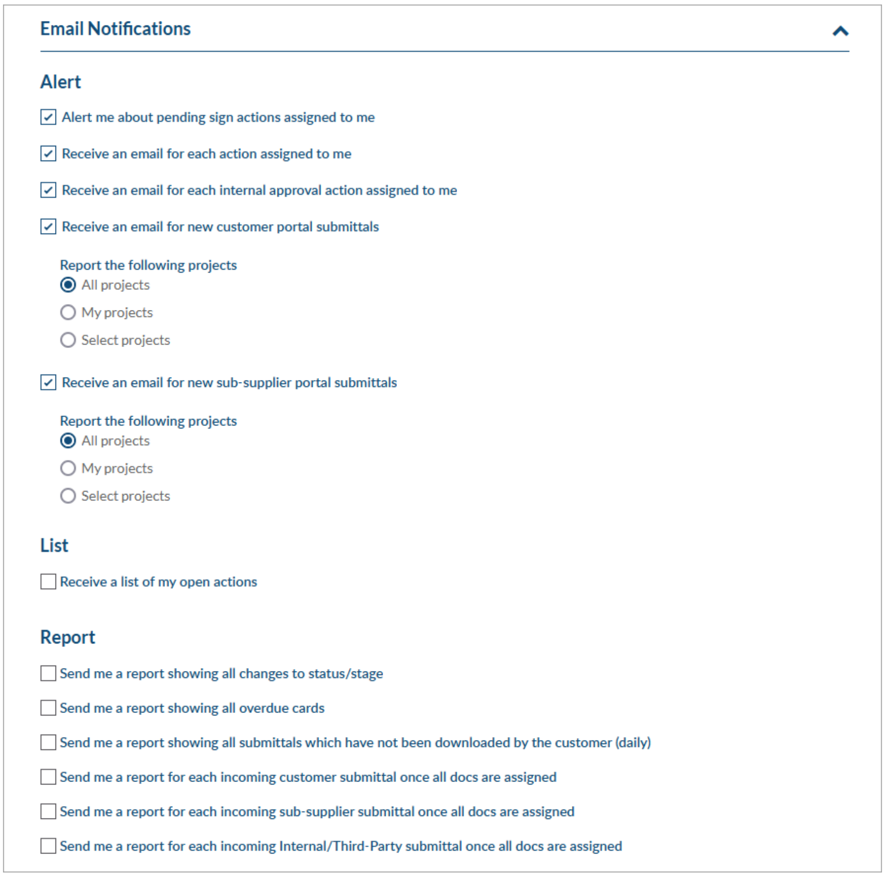
User can choose whether to receive system notifications about all projects, or only those that they are involved with.



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.



***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.*

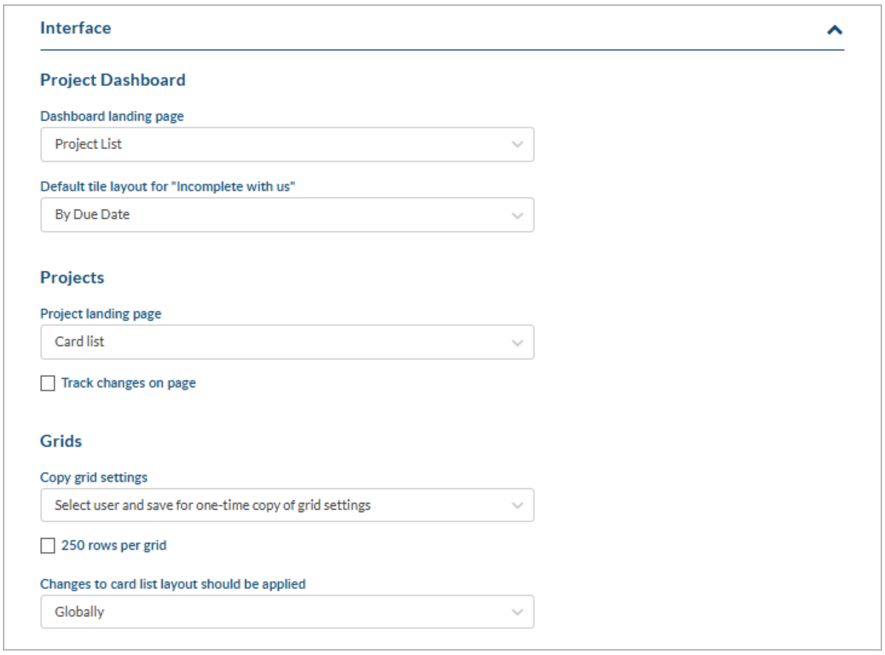
Projects

- **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

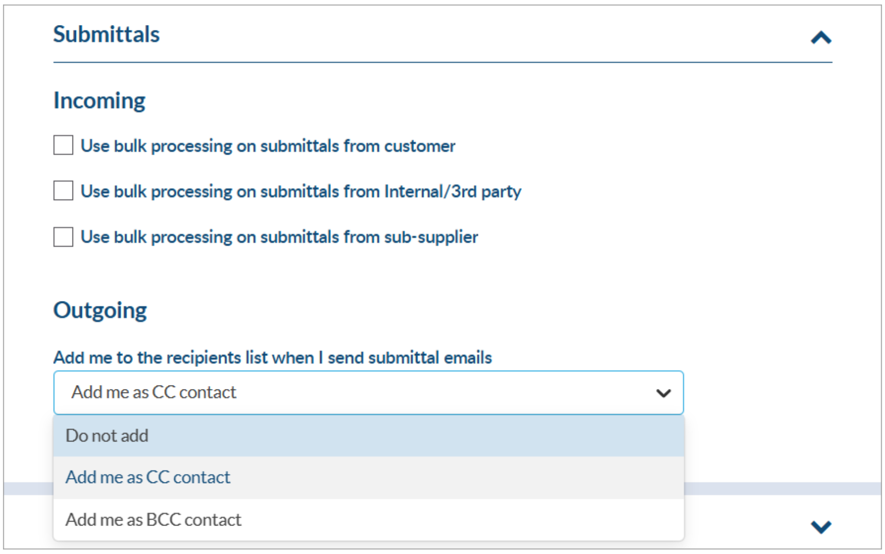
- **Copy grid settings:** It is possible to copy all grid settings from another user. Generally only users when launching a new user.
- **250 rows per grid:** By default, the system shows a maximum of 100 rows per grid. This is generally to make page loading faster. The option exists to display up to 250 rows, but performance may suffer.

- **Changes to card layout should be applied:** Choose whether to apply card list layout changes globally or locally.



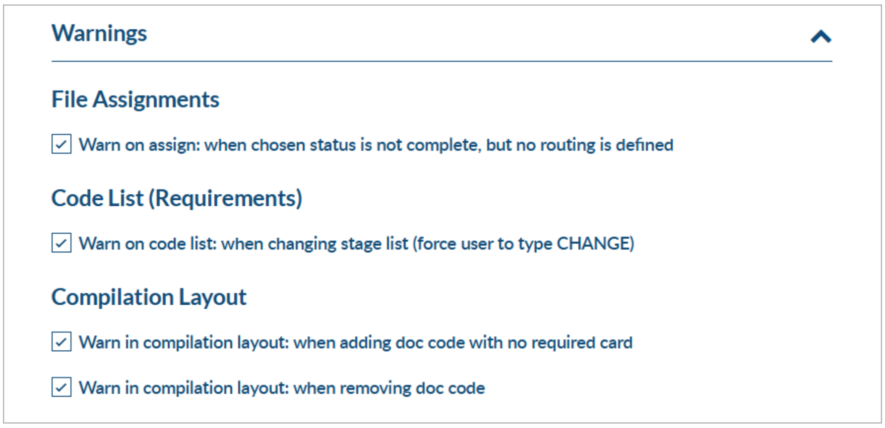
Submittals

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



Warnings

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



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.