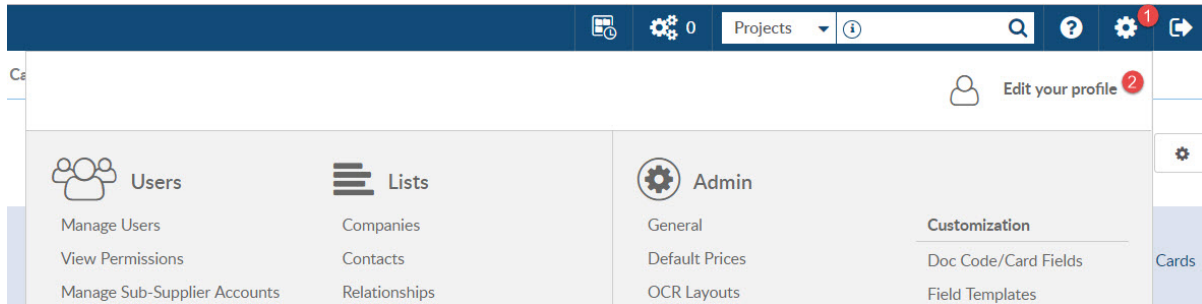# User Profile

08/02/2024 11:18 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

User Info

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

Select Colour: All markups by this user will appear in the selected color. The squares with a white person icon are in use by other users.

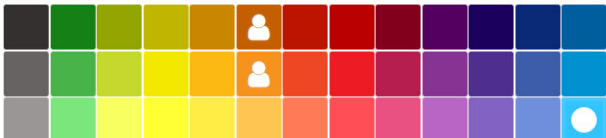Any data fields with an asterisk ('*') are mandatory.

System Access

Email, Role and Password

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

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

Users may update/change their passwords from this screen.

System access

Login name *

Role *

Change password

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

Confirm new password

☐ Force user to change password

Affiliate Settings

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 Settings

Default Affiliate

Wolfe Instruments

Affiliate Address

Use Company Default Address

Project Access
☐ All
☑ Wolfe Instruments
☐ Wolfe Systems

Library Access
☐ All
☑ Wolfe Instruments
☐ Wolfe Systems

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

Signature and Initials

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 a the files, simply sign a piece of paper, and take a photo of it.

To upload, just drag and drop the images in the applicable field.

Signature and Initials

Your Signature

☁ Drag and drop new image

Or choose files from disk

Your Initials

☁ Drag and drop new image

Or choose files from disk

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.

Dashboard settings

- Dashboard Landing Page – You can choose the first page that you want to see on your dashboard.

Dashboard Landing Page

Projects ⌄

Actions

Projects

Project list

Default Card Layout

For more information about "Incomplete with us" in your project dashboard click go to Project Dashboard Overview and Tile Layout.

Project Settings

Project Landing Page: Allows you to choose the first screen you see when accessing a project.

CSV Delimiter: Each user may define the separator to use. Typically, they will want to match the settings from EXCEL.

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.

Email Notifications

Enable/disable the automated emails which are sent from DocBoss. Additional options appear for Lists and Reports

where you can select how you want to receive the different reports.

Email Notifications

Alert

☐ Receive an email for each action assigned to me.

☑ Receive an email for each internal approval action assigned to me.

List

☑ Receive a list of my open actions

Send list...
◉ Every working day
○ Every Monday

☐ Hide empty cards

Report

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

Send report...
◉ Every working day
○ Every Monday

Report the following projects:
○ All projects
◉ Select projects

| Fabrication Project(147568) × | ⌄ |

☐ Send the email, even if there are no results.

Warnings

Warnings are pop ups that show up in DocBoss. You may choose to disable some standard system warnings if you find them to be a nuisance.

Warnings

☑ Warn on assign: When chosen status is not complete, but no routing is defined

☑ Warn on Requirements List: When changing stage list (force user to type CHANGE)

☑ Warn in Compilation Layout: When adding doc code with no required card

☑ Warn in Compilation Layout: When removing doc code