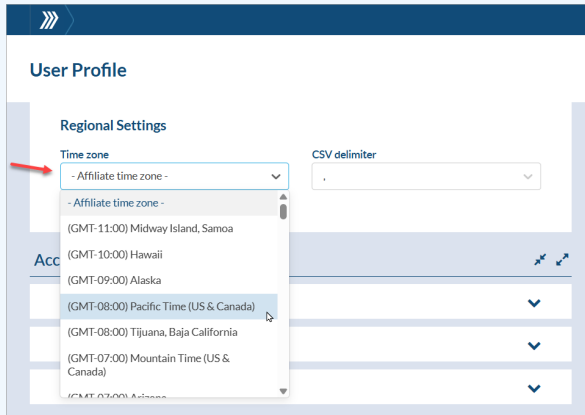




By default, the user's selected time zone will match the time zone set at Admin > General (i.e., instance time zone). If using custom affiliate admin settings, the user's selected time zone will default to the time zone set for their primary affiliate. In either case, the user's selected time zone can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

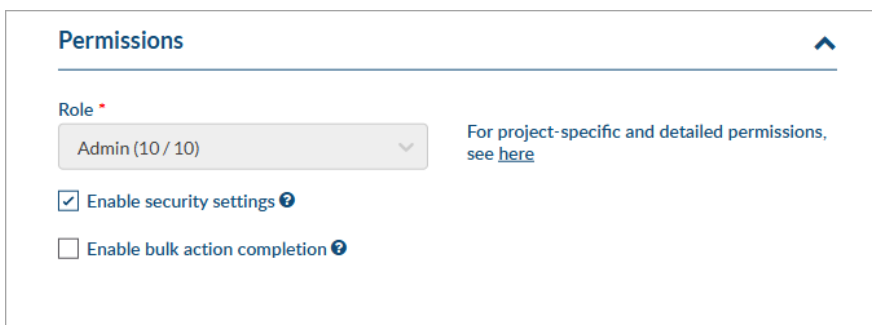


Access

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.



Login

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

Users may update/change their passwords from here.

Login
^

Identity

Login name *

Email *

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 *

Affiliate 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.

Outputs Signature ^

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 *
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Company	Organization unit
<input style="width: 95%;" type="text" value="Wolfe Instruments"/>	<input style="width: 95%;" type="text"/>
Country	
<input style="width: 95%;" type="text" value="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.

- **Outgoing submittal landing page:** Allows you to choose the first screen you see when accessing the outgoing submittals page. By default, will be set to show the last visited page.

Grids

- **Copy grid settings:** It is possible to copy all grid settings from another user. Generally only used 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 loading time may increase.
- **Use expandable card list grid (height follows row count):** The default card list grid is fixed to the viewport height with horizontal scrolling, loading records in paginated sets. Enabling this option restores the classic layout, where the grid height expands to follow the configured row count and can extend beyond the viewport, requiring full-page vertical scroll. The tradeoff is loss of the horizontal scroll available in the default view
- **Apply grid layout changes:** Choose whether to apply card list layout changes across all projects or only to individual projects.

Interface

Project Dashboard

Dashboard landing page

Project Dashboard

Default tile layout for "Incomplete with us"

By Due Date

Projects

Project landing page

Default (per role settings)

Track changes on page

Outgoing submittal landing page

Last visited

Grids

Copy grid settings

Select user and save for one-time copy of grid settings

250 rows per grid

Use original (long page) card list grid

Apply grid layout changes

Across all projects

Submittals

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

Submittals ^

Incoming

Use bulk processing on submittals from customer

Use bulk processing on submittals from Internal/3rd party

Use bulk processing on submittals from sub-supplier

Outgoing

Add me to the recipients list when I send submittal emails

Add me as CC contact v

Do not add

Add me as CC contact

Add me as BCC contact

v

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

