

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 ^{*}

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 *

Company

Wolfe Instruments

Organization unit

Country

Select or type ahead...

Generate

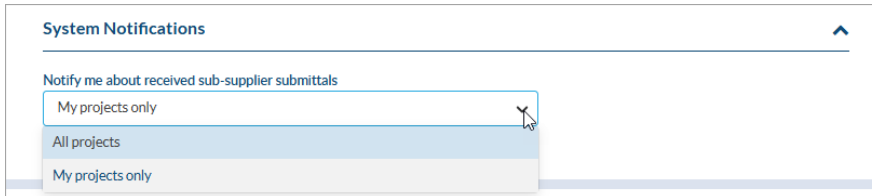
No certificate yet...

⚡ Generate Certificate

Notifications

System Notifications

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

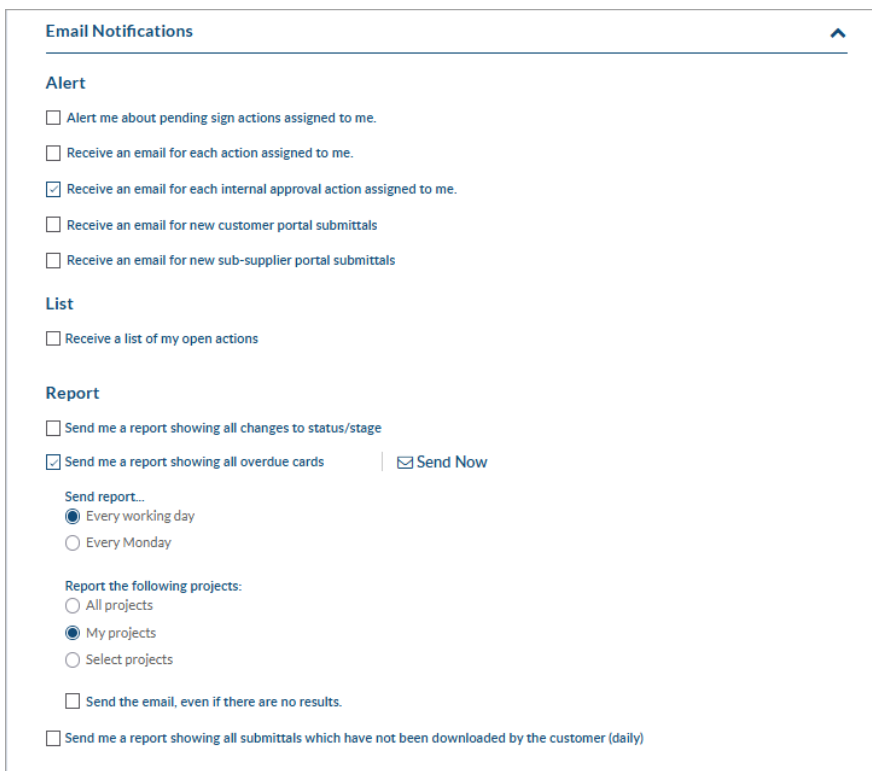


The screenshot shows a 'System Notifications' section with a dropdown menu. The dropdown is open, showing three options: 'My projects only' (highlighted), 'All projects', and 'My projects only'.

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.



The screenshot shows the 'Email Notifications' settings page. It is divided into three sections: Alert, List, and Report. Each section contains several checkboxes and radio buttons for configuring email preferences.

- 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
 - Receive an email for new sub-supplier portal submittals
- 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 Now
 - Send report...
 - Every working day
 - Every Monday
 - Report the following projects:
 - All projects
 - My projects
 - Select projects
 - Send the email, even if there are no results.
 - Send me a report showing all submittals which have not been downloaded by the customer (daily)

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.

Interface ^

Project Dashboard

Dashboard landing page
Project List ▼

Default tile layout for "Incomplete with us"
By Due Date ▼

Projects

Project landing page
Card list ▼

Track changes on page

Grids


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

250 rows per grid

Changes to card list layout should be applied
Globally ▼

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




- Do not add
- Add me as CC contact
- Add me as BCC contact



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 