

# Add Users / Edit / Disable Users

09/12/2024 2:39 pm MDT

## How to get here:

These options are only available from the [Manage Users](#) screen.

- **To Add:** Above the grid, click Add User.
- **To Edit:** Click the edit icon (tools column) for the specific user.
- **To Disable:** Click the disable icon.
- **To Reactivate:** Set "Inactive Accounts" to SHOW and select the reactivate icon (under the Tools column) for the applicable users. The Security permission is required to complete this function.

## Add User

Add the basic information for the user. 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.

### User Info ▲

First name \*

Last name \*

Address \*

Phone

Job title

Alpha Employee ID

Initials

Time Zone  
- Affiliate Time Zone - ▼

Select colour \*  


# System Access

We suggest entering the users email address as the **Login name** to ensure it is unique.

Roles are already established. If you need more information about what each role means you can find it in [Definition of the Roles](#).

**System access** ^

Email \*

Role \*

Send invitation email

Force user to change password

DISABLE account authentication ?

Enable security settings ?

Enable bulk action completion ?

**Affiliate Settings**

Primary Affiliate \*

<p><b>Project Access</b></p> <p><input type="checkbox"/> All</p> <p><input type="checkbox"/> Alpha Instruments, Inc.</p> <p><input type="checkbox"/> Alpha Supply</p> <p><input type="checkbox"/> Alpha Supply CA</p> <p><input type="checkbox"/> Alpha Supply US</p>	<p><b>Library Access</b></p> <p><input type="checkbox"/> All</p> <p><input type="checkbox"/> Alpha Instruments, Inc.</p> <p><input type="checkbox"/> Alpha Supply</p> <p><input type="checkbox"/> Alpha Supply CA</p> <p><input type="checkbox"/> Alpha Supply US</p>
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Only Admin users can change user email addresses.

## Affiliate Settings

If using affiliates, access per affiliate can be configured when setting up a new user, or changed for existing users. For more information, see [Enable Affiliate Permissions for a User](#).

When upgrading a user role to full, affiliate permissions will be removed, and must be added back. Note that an admin user can only add affiliates to which they also have access. Admin users with the security permission have full access to add all affiliates.

On downgrade (from full to review/view), affiliates are not affected.

## Default User settings

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

**Defaults** ▲

**Dashboard settings**

Dashboard Landing Page  
Project Dashboard ▼

Default Tile Layout for "Incomplete with us"  
By Due Date ▼

**Learning Mode**

Enable Learning Mode

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

**Project settings**

Project Landing Page  
Default (per role settings) ▼

Track Changes on page

CSV Delimiter  
,

Notify me about received sub-supplier submittals  
My Projects Only ▼

Add me to the recipients list when I send submittal emails  
Add me as CC contact ▼

**Grid settings**

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

Locally 

Globally 

**Incoming Submittal Setting**

Use bulk processing on submittals from customer

Use bulk processing on submittals from Internal/3rd party

Use bulk processing on submittals from sub-supplier

# Email Notifications

Enable/disable the automated emails which are sent from DocBoss. Additional options appear for some of the settings.

**Email Notifications** 

**Alert**

- Alert me about pending eSign actions assigned to me.
- 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

**Report**

- Send me a report showing all changes to status/stage
- Send me a report showing all overdue cards

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)

# Warnings

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