

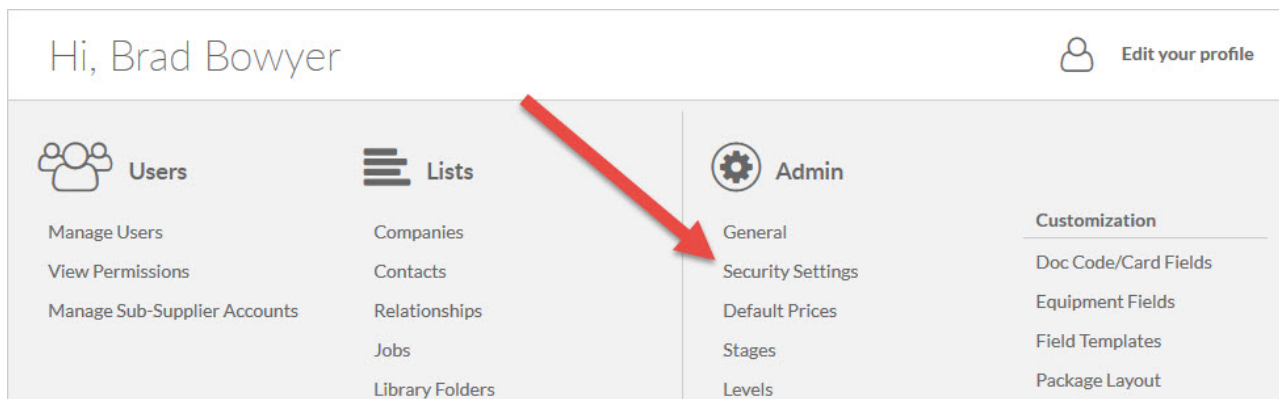
# Multi Factor Authentication (MFA) for Submittal Recipients

10/06/2025 2:54 pm MDT

## Enable for System

To enable Multi-Factor Authentication (MFA) your security enabled user should navigate to the security settings screen. Note that only the users with security settings will see this interface.

Admin > Security Settings.



1. Enable the option for submittal recipient authentication. By default this is disabled.
2. Define how often your users/recipients should authenticate. **As long as they are accessing the system from the same IP address**, the authentication will be maintained. This setting is used for both users and submittal recipients.

A screenshot of the 'Security Settings' form. It contains several fields: 'Password reset interval (days)' with a value of 45; a dropdown menu for 'Enable authentication option for submittal recipients (system wide)' currently set to 'No', with a red circle and the number '1' next to it; a dropdown menu for 'Select the user roles which require multi-factor authentication' with 'Admin' and 'Full' selected; and a field for 'Require authentication every X days' with a value of 30, with a red circle and the number '2' next to it. A 'Save' button is at the bottom.

## Enable MFA on Project Configuration

Once enabled for the entire system, this setting is available to turn ON/OFF under **Set Up > Project Configuration**

> Main > Submittal Defaults > Batching, Downloads and Medium > Downloads > Require recipient to authenticate when accessing submittals.

The screenshot shows the 'Set Up Project Configuration' interface. The 'Main' tab is selected. The 'Submittal Defaults' section is expanded, showing 'Batching, Downloads and Medium' settings. The 'Downloads' section is highlighted, showing the option 'Require recipient to authenticate when accessing submittals' set to 'Yes'.

1. Set Up Project Configuration

2. Submittal Defaults

3. Batching, Downloads and Medium

4. Downloads

Require recipient to authenticate when accessing submittals

Yes

The default for this can be set under Project Configuration Templates at Admin.

## Email Templates

Users can customize the authentication email which is sent to submittal recipients (when asked to authenticate).

Go to **Admin > Output Templates > Email Templates > Recipient Authentication Message** to modify.

The screenshot shows the 'Email Templates' interface. A table lists various email templates. The 'Recipient Authentication Message' template is highlighted in yellow, and a red arrow points to the 'Tools' column for this template.

Type	Name	Default for New Projects	Tools
Ad-Hoc Submittal	Ad-Hoc submittal notification	Y	Q [icon]
Customer Submittal	Customer submittal notification	Y	Q [icon]
Customer Submittal	Customer Submittal (separate file per submittal)		Q [icon]
Expedite Request (Customer)	Expedite Request (Customer Default)	Y	Q [icon]
Expedite Request (Internal)	Expedite Request (Internal Default)	Y	Q [icon]
Expedite Request (Reviewer)	Expedite Request (Reviewer Default)	Y	Q [icon]
Expedite Request (Sub-Supplier)	Expedite Request (Sub-Supplier Default)	Y	Q [icon]
Internal Submittal	Internal submittal notification	Y	Q [icon]
Recipient Authentication Message	Recipient Authentication Message		Q [icon]
Sub-Supplier Submittal	Sub-Supplier submittal notification	Y	Q [icon]

No more pages [gear icon] Show on page: 20

## Recipient View

When accessing the download from hyperlink option for a submittal, the user will first select their name from the list (\* see note). After selecting their name and clicking download, the user will be sent an email with an authentication code and prompted to enter the code on the download screen.

Thank you for using our document control system!

Project: Valve Project  
PO Number: 1234  
Submittal Number: T-026

**Please note:** Deliverability is important for us. To ensure all recipients have successfully retrieved this data, it is important that you carefully select your name from the distribution list.

ACME Engineering:

☒ Alice Smith

Account Authentication ?

Please enter the authorization code \*

**Please note:** When you click to download, your IP address will be recorded as a download location for these files for security, record keeping and troubleshooting purposes.

Download file

I did not receive a code - please resend

After completing this, they will only need to re-authenticate every X days (as configured above), as long as they access the submittal download links from the same IP address.



**Note:** When MFA is not required for submittal recipients, there is an option for users who do not appear in the recipient list to still access the submittal. However, when MFA is required, this option is unavailable as an additional security measure.

Without MFA requirement

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Omega Supply

**ACME  
CORPORATION**

Thank you for using our document control system!

Project: Pump Project  
PO Number: 5678  
Submittal Number: T-0047

**Please note:** Deliverability is important for us. To ensure all recipients have successfully retrieved this data, it is important that you carefully select your name from the distribution list.

Omega Supply:

☐ Alysha Moseven

☐ My name does not appear in list

With MFA requirement

DOCBOSS

Omega Supply

**ACME  
CORPORATION**

Thank you for using our document control system!

Project: Pump Project  
PO Number: 5679  
Submittal Number: T-0047

**Please note:** Deliverability is important for us. To ensure all recipients have successfully retrieved this data, it is important that you carefully select your name from the distribution list.

Omega Supply:

☐ Alysha Moseven