

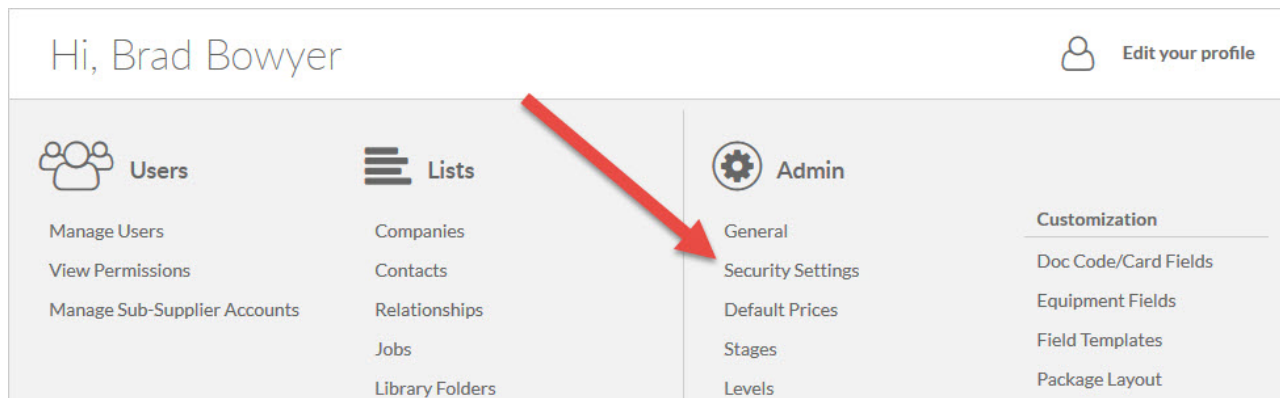
Multi Factor Authentication (MFA) for Submittal Recipients

07/23/2024 3:47 pm EDT

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.



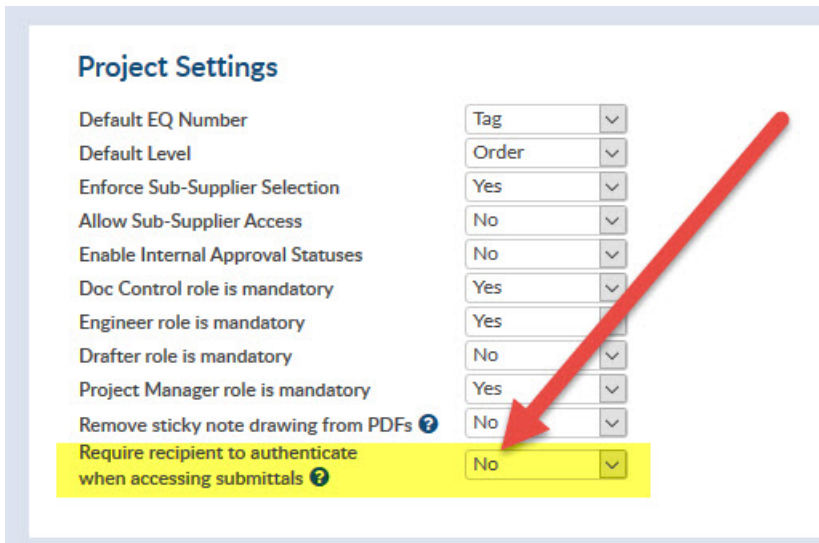
1. Enable the option for submittal recipient authentication. By default this is disabled.
2. Define how often your users/recipients should authenticate. **As long as they are accessing the system from the same IP address**, the authentication will be maintained. This setting is used for both users and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

A screenshot of the 'Security Settings' form. The form has several fields: 'Password reset interval (days)' with a value of 45; 'Enable authentication option for submittal recipients (system wide)' with a dropdown menu set to 'No'; 'Select the user roles which require multi-factor authentication' with a dropdown menu set to 'Admin + Full'; and 'Require authentication every X days' with a value of 30. A 'Save' button is at the bottom. Two red circles with numbers 1 and 2 are overlaid on the form, pointing to the 'Enable authentication option...' and 'Require authentication every X days' fields respectively.

Enable MFA on Project Fields

Template

Once enabled for the entire system, any user can enable the function directly on the Project Field Template for a project (or in the admin PFT, for all future projects).



Project Settings

Default EQ Number	Tag
Default Level	Order
Enforce Sub-Supplier Selection	Yes
Allow Sub-Supplier Access	No
Enable Internal Approval Statuses	No
Doc Control role is mandatory	Yes
Engineer role is mandatory	Yes
Drafter role is mandatory	No
Project Manager role is mandatory	Yes
Remove sticky note drawing from PDFs ?	No
Require recipient to authenticate when accessing submittals ?	No

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 to modify.

Email Templates			
Type	Owner	Default for Project	Tools
Ad-Hoc Submittal	System	✓	🔍🗑️✎
Customer Submittal	System	✓	🔍🗑️✎
Download Code	System		🔍✎
Internal Submittal	System	✓	🔍🗑️✎
Sub-Supplier Submittal	System	✓	🔍🗑️✎

No more pages | 🔄 Show on Page: 20 | ▾

Hide disabled