

infotech®



Doc Express®

Roles and Access Guide

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Doc Express® Role and Access Introduction

The *Doc Express Roles and Access Guide* provides a high-level overview of the abilities of each role in the Doc Express® service. If you have any questions or need additional help, please contact Doc Express customer support.

The Role Description section identifies the access and abilities of each specific role. The Roles and Access section breaks down which roles can perform specific actions within the Doc Express service.

New users in a non-manager role from your agency are assigned read-write access when added to a contract. New users not in your agency are assigned prime access. Managers can change these roles.

Doc Express Role Descriptions

Name	Description
Manager	<p>The manager role is an administrator at the contract level and is automatically assigned to every contract within the Doc Express service. This role is given full access and is usually assigned to only one or two users within an agency, so that processes are standardized, monitored, and followed according to management's directive.</p> <p>Managers are not listed in the access lists as they have access to all contracts.</p>
Editor	<p>The editor role is a non-manager user that performs supervisory workflow actions only after a contract has been created. This role may be assigned to a user given the authority to perform and change certain processes allowed in a manager's role. Editors do not have access to create, edit, or manage user groups or drawers under Preferences, nor do they have access to email user roles. Editors can see all comments in drawers to which they are assigned. The role must be initially assigned to a contract by a manager. Existing editors can assign other editors.</p>
Read-Write	<p>The read-write role is a non-manager user that performs routine workflow actions. This role is usually assigned to multiple users and follows the day-to-day processes set up by a manager or changed by an editor. Read-Write users can see all comments in drawers to which they are</p>

Name	Description
Read-Only	<p>assigned. An user in a non-administrative role is given the read-write role when first assigned to a contract.</p> <p>The read-only role is a non-manager user that has access to see contract information and download and view documents, share their location with others, review the audit trail, see comments, and export a contract archive and drawer's log within each drawer. It cannot submit, edit, or comment on any document. It can see all dashboard information and all comments in drawers to which they are assigned. If assigned to a document in a workflow step, the role can receive email notifications.</p>
Reviewer	<p>The reviewer role is a non-manager user that usually performs audit workflow actions within the Doc Express service. This role is assigned by the agency to a few users, and follows the processes set up by a manager or changed by an editor.</p> <p>Reviewers cannot submit main documents (only supporting) to a contract, and if the Restrict Document Access check box is selected, they will not be able to download and view a document or add any comments. Reviewers can see all comments in drawers to which they are assigned. Contract and drawer access must still be assigned.</p>
Prime	<p>The prime role is assigned by a manager or editor to the prime contractors on a contract. The role can be assigned to the prime's business name, where all employees will have access, or to individual employees within the prime's business. Primes can see all comments in drawers to which they are assigned. This</p>

Name	Description
	role performs workflow actions within the Doc Express service that have been set up by the agency.
Associate	<p>The associate role is a subcontractor assigned by a manager, editor, or prime contractor. The role can be assigned to the subcontractor's business name, where all employees will have access, or to individual employees within the subcontractor's business. Associates can see all comments in drawers to which they are assigned. This role performs workflow actions within the Doc Express service that have been set up by the agency.</p>

Doc Express Roles and Access

Function	Actions Performed by User Role	Manager	Editor	Read-Write	Read-Only	Reviewer	Prime	Associate
Preferences	Create, edit, and manage user groups	X						
	Create, edit, and manage new and existing template drawers	X						
	Create, edit, and manage drawer workflows	X						
	Email to any user role or all roles at one time	X						

Function	Actions Performed by User Role	Manager	Editor	Read-Write	Read-Only	Reviewer	Prime	Associate
Contracts	Search for contracts	X	X	X	X	X	X	X
	Create a contract	X						
	Edit a contract name, description, location, bid order number, letting date, start date, and end date	X	X					
	Mark a contract favorite	X	X	X	X	X	X	X
	Lock a contract	X	X					
	Unlock a contract	X	X					
	Export a contract archive	X				X		
	Assign individual agency users, agency groups, primes, and associates (outside organizations) access	X	X					
	Remove individual agency users, agency groups, primes, and associates (outside organizations) access	X	X					
	Search documents across all contracts	X	X	X	X	X	X	X
	Manage Tags (¹ for outside reviewer only)				X ¹		X	X
	Assign a subcontractor access	X	X				X	
	After assigning a subcontractor, can remove the same subcontractor	X	X				X	

Function	Actions Performed by User Role	Manager	Editor	Read-Write	Read-Only	Reviewer	Prime	Associate
Drawers	Change a drawer name and/or type	X	X					
	Change the standard workflow, executed by, type of signature, publish, resubmission, revision and bond verification options	X	X					
	Assign access to individual users, agency groups, primes and associates.	X	X					
	Remove access to individual users, agency groups, primes and associates.	X	X					
	Search and view all documents in any drawer (² for Agency Owner reviewer role only)	X	X	X	X ²	X		
	Search and view all documents in a non-restricted drawer (³ and if Enable Downloads is selected for Associate)	X	X		X	X	X	X ³
	Enable downloads for associates to view documents submitted by the agency in a non-restricted drawer	X	X					
	Enable downloads for associates to view documents submitted by the prime in a non-restricted drawer						X	
	Enable downloads for associates to view documents submitted by the associate in a non-restricted drawer							X
	Submit documents (⁴ Reviewer role can submit only supporting documents)	X	X	X	X ⁴		X	X
	Remove a document that this same user submitted provided it hasn't been transitioned by another user or no comments have been made	X	X	X	X		X	X
	Archive or restore any document	X	X					
	Enter and edit a due date for any document (⁵ only for documents they upload)	X	X	X			X ⁵	X ⁵

Function	Actions Performed by User Role	Manager	Editor	Read-Write	Read-Only	Reviewer	Prime	Associate
Drawers	Change any document's title and type (⁵ only for documents they upload)	X	X	X			X ⁵	X ⁵
	Transition any document as long as an agency user role is assigned to the step	X	X					
	Revert any previous transition and those of any other role within the agency	X	X					
	Transition a document	X	X	X	X		X	X
	Revert a previous transition that this same user transitioned	X	X	X	X		X	X
	Comment on any document (⁶ only during transition steps to which they have been assigned for outside reviewers)	X	X	X	X ⁶		X	X
	Can see all comments in drawers to which they are assigned	X	X	X	X	X	X	X
	Add supporting document to any document (⁶ only during the transition step to which they have been assigned for outside reviewers)	X	X	X	X ⁶		X	X
	Export a drawer's log (⁷ for Agency Owner reviewer role only)	X	X	X	X ⁷	X	X	X

Function	Actions Performed by User Role	Manager	Editor	Read-Write	Read-Only	Reviewer	Prime	Associate
Dashboard	Overview of total number of contracts, documents, and supporting documents (⁷ for Agency Owner reviewer role only)	X	X	X	X ⁷	X		
	Documents past due and ready to be transitioned	X	X	X	X	X	X	X
	Contracts ending soon	X	X	X	X	X	X	X