Tech Tip #46: Managing eSign Signer Roles in ProDOC Forms

These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.

Updating the signer role in a ProDOC form is very easy and something you may need to adjust from time to time.

First, open **ProDOC – Setup** and navigate to the **Forms** tab. From here, find the form you need to update in the list of forms in the bottom half of the window. Once you have selected the form, click **Modify**.
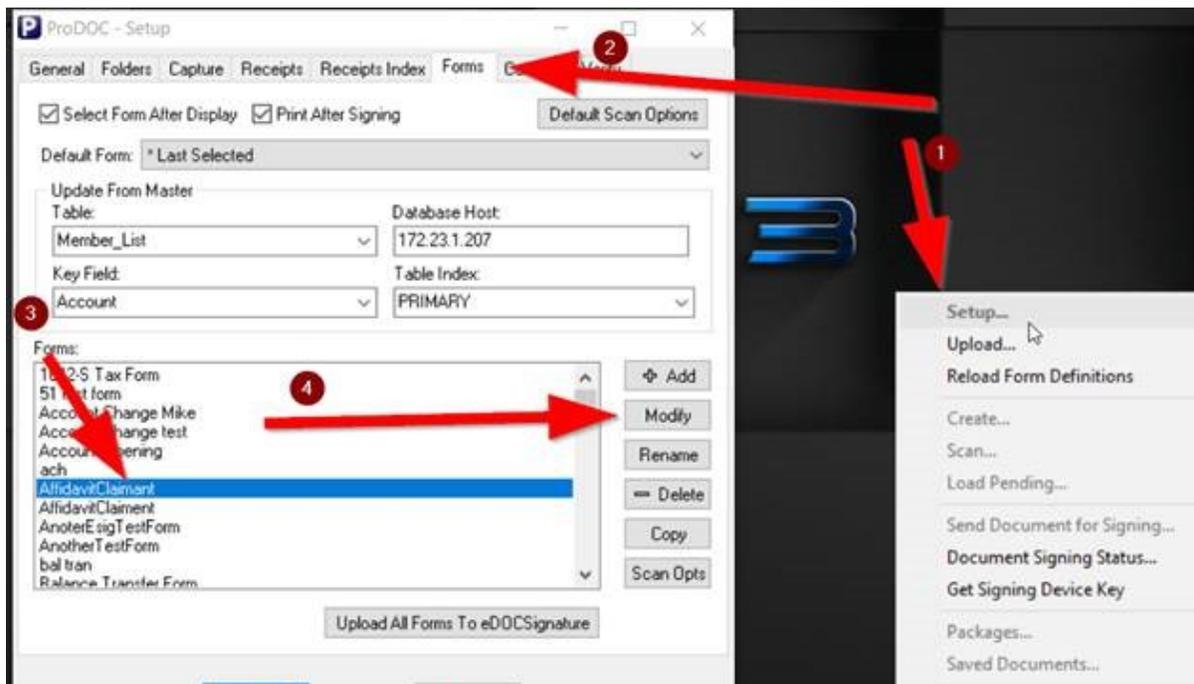
You will now have a new window open called ProDOC Form Definition – <Form Name>. Scroll down and find the field on which you need to adjust the role. Right-click on the field and select **eSign ID**.

The last step of this process called **SigBox** will now open. The option at the very top under "eSign Signer" is how you can change the role. If you need to make a new role, use the **eSign Signer Roles** button. This will open the list of available roles and allow you to add or make changes to existing roles.