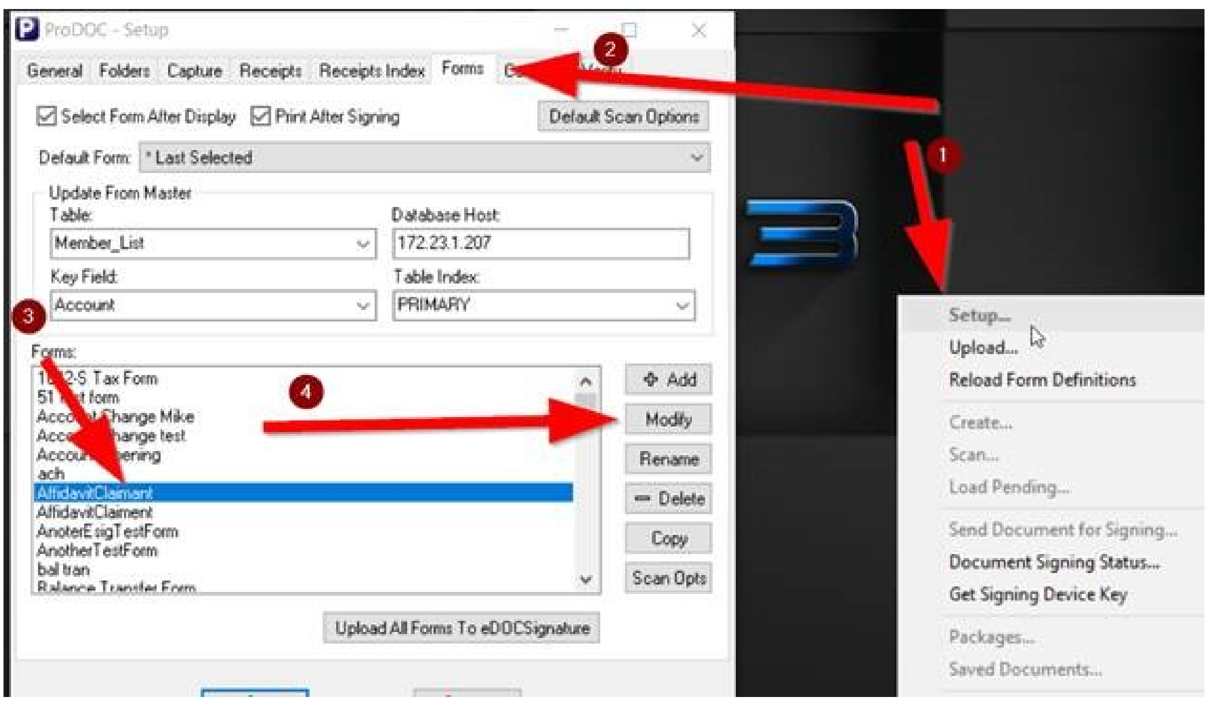
Tech Tip #50: Managing eSign Roles in ProDOC Forms

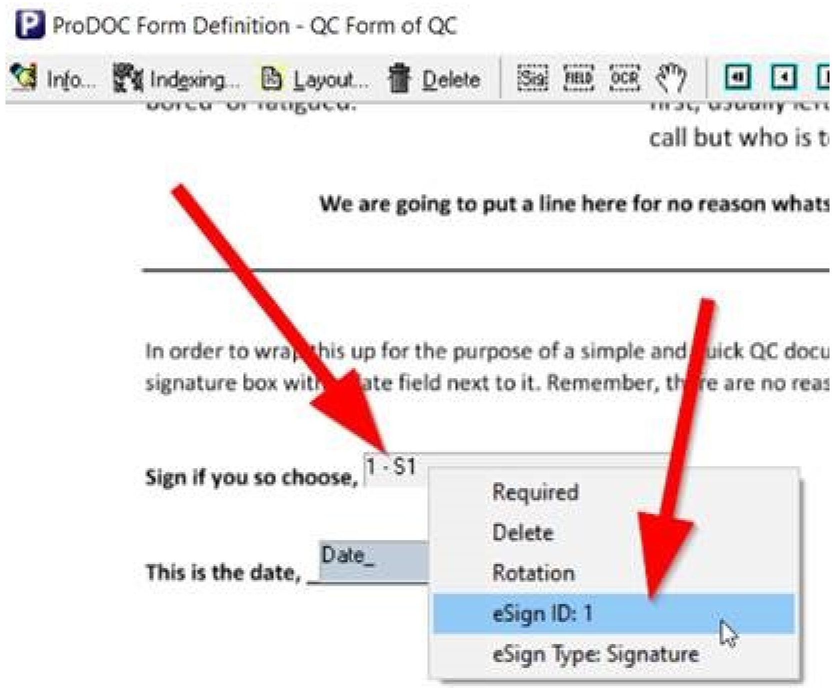
These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.

Updating the **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 make an update to in the list of forms on the bottom half of the window. Once you have selected the form, click **modify** on the right side menu.



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 and final window of this process will now open a box called **SigBox**. 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.