

# Set eSignature requirements per Doc Code (or Card)

08/02/2024 1:51 pm MDT

This article explains the second step of the eSign process.

## Set Defaults per Doc Code

Default eSignature settings can be assigned to each Doc Code via the 2 eSign columns. This is step 2 in the eSign process.

Code List (Requirements)				
Doc Code ↑	Doc Code Name	Level	eSign	eSignatories
B02	Vendor Document Register	Order		
D16	Instrument Data Sheet	Tag (TE)		
E02	Cross Sect Dwg / Exploded View Diagram	Item/Model (TE)	User	None
F06	Instrument Termination and Hook Up Details	Order	User	
F13	Outline Dimensions	Order	User	
G15	Instrument Calculation	Order	System	
I03	Quality Plan	Order		

1. Set the Type in the eSign column first.

- Blank (no eSignature)
- User - route to each user to apply a stamp
- System - apply a hidden signature to each file without user input

Once you've made your eSign selection, press save on the code list.

2. After saving, you will see the hyperlink to set the default eSignature recipients. Click to set.

### Assign reviewers for eSign

Route to Doc Contol?  Route to Engineer?  Route to Drafter?  Route to Manager?

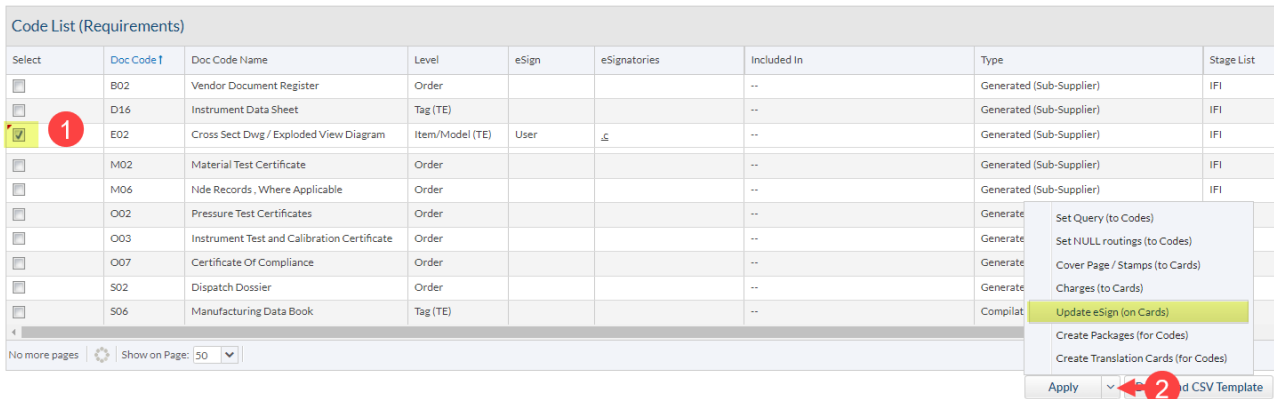
Brad Bowyer  
John Smith  
- Select User -  
Luis Berumen

Between the first two roles, which user should sign first?  Engineer  Doc Contol

Cancel Save

# Apply change to cards

Note that if you change the eSignature settings on the code list AFTER the cards already exist, you must **apply the change** to the cards. This is done by selecting the codes, and clicking the **APPLY** button under the code list grid.



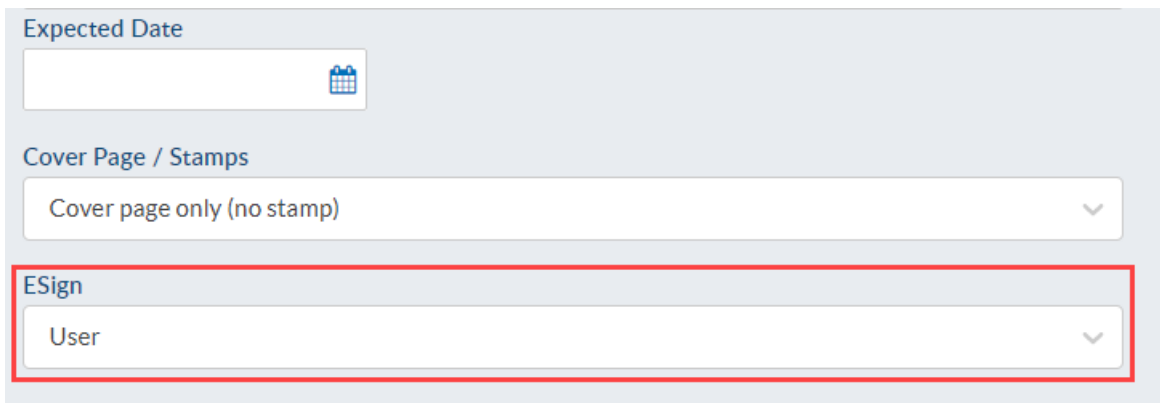
The screenshot shows a table titled "Code List (Requirements)" with columns: Select, Doc Code, Doc Code Name, Level, eSign, eSignatories, Included In, Type, and Stage List. The row for Doc Code E02 is selected, and a context menu is open over it. The menu options are: Set Query (to Codes), Set NULL routings (to Codes), Cover Page / Stamps (to Cards), Charges (to Cards), Update eSign (on Cards) (highlighted), Create Packages (for Codes), and Create Translation Cards (for Codes). Below the table, there is an "Apply" button and a "Download CSV Template" button. A red circle with the number "1" is next to the E02 row, and another red circle with the number "2" is next to the "Apply" button.

Select	Doc Code	Doc Code Name	Level	eSign	eSignatories	Included In	Type	Stage List
<input type="checkbox"/>	B02	Vendor Document Register	Order			--	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>	D16	Instrument Data Sheet	Tag (TE)			--	Generated (Sub-Supplier)	IFI
<input checked="" type="checkbox"/>	E02	Cross Sect Dwg / Exploded View Diagram	Item/Model (TE)	User	Δ	--	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>	M02	Material Test Certificate	Order			--	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>	M06	Nde Records , Where Applicable	Order			--	Generated (Sub-Supplier)	IFI
<input type="checkbox"/>	O02	Pressure Test Certificates	Order			--	Generate	
<input type="checkbox"/>	O03	Instrument Test and Calibration Certificate	Order			--	Generate	
<input type="checkbox"/>	O07	Certificate Of Compliance	Order			--	Generate	
<input type="checkbox"/>	S02	Dispatch Dossier	Order			--	Generate	
<input type="checkbox"/>	S06	Manufacturing Data Book	Tag (TE)			--	Compliat	

## Change eSignature type for a specific card:

On each card, you can edit ONLY the TYPE of eSignature (User or System). eSignatories (users who will sign the card) are managed via:

- default settings on the doc code, or
- changed during the submittal process.



The screenshot shows a form with three sections: "Expected Date" with a calendar icon, "Cover Page / Stamps" with a dropdown menu set to "Cover page only (no stamp)", and "ESign" with a dropdown menu set to "User". The "ESign" section is highlighted with a red border.

For information on how to Generate eSignature Certificates (Step 1), see our article [here](#).

For information on Applying eSignatures to Outgoing Submittals (Step 3), see our article [here](#).

For information on Signing files with eSignature (User action) (Step 4), see our article [here](#).