Set eSignature requirements per Doc Code (or Card)

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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.

Tools 4	Doc Code ↑	Level	eSign	eSignatories
1 🗘 🖓 🛍	A01	Order		2
10 😳 💮 🛍	B01	Item/Model (TE)	User 🍾	None
10 😌 😧 🖻	C04	Item/Model (TE)	h	8
10 👽 🚱 🏛	C15	Item/Model (TE)	User	
10 😳 😳 🛍	D01	Order	System	
	C00	Cult Constitut		

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.

~	Route to Doc Control	
	Alysha Mosveen	\sim
~	Route to Engineer	
	Select or type ahead	Ň
	Route to Drafter	
	Select or type ahead	~
	Route to Manager	
	Select or type ahead	\sim
Be	tween the first two roles, which user should sign first? Engineer	
0	Doc Control	

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.

Tools I		Doc Code ↑	Doc Code Name	Level	eSign	eSignatories	Header/Footer	Charges	Required	Туре	
10 ♥ @ 🗎		A01	Supplier Document Register	Order				Q	<u>1/1</u>	Generated (Sub-Supplier)	
10 😌 \Theta 🛍		-B01	General Arrangement Drawings	Item/Model (TE)	User	÷	\checkmark	Q	<u>6/6</u>	Generated (Sub-Supplier)	2
∅♀♀⊜		C04	Bill of Materials	Item/Model (TE)			\checkmark	Q	6/6	Generated (Sub-Supplier)	į.
₿₩₿₿		C15	Equipment Vendor Catalogue Sheets	Item/Model (TE)			\checkmark	Q	6/6	Generated (Sub-Supplier)	1
∅♀♀⊜≘		D01	Data Sheets	Order				Q	<u>1/1</u>	Generated (Sub-Supplier)	
10 ♥ ♥ 🗎		G02	Preservation Procedure and Handling & Shipping Procedures	Sub-Supplier			\checkmark	<u>0</u>	3/3	Generated (Sub-Supplier)	
∅♀♀⊜≘		H05	Non-Destructive Exam. Procedures (NDE)	Sub-Supplier			\checkmark	Q	3/3	Generated (Sub-Supplier)	
₿₩₿₿		K01	Vendor Data Book	Order			\checkmark	Q	1/1	Generated (Sub-Supplier)	
Select all (this page only)								y)			
8						Apply 👻	Import/Export Save	1			
							Charges (to Cards)				
							Cover Page / Stamps (to Cards)				
						Stamp Template (to Cards)					
3						Update eSign (on Cards)					

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.

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.