

eForms Manager Permission

06/26/2024 8:53 am EDT

The ability to become an eForms Manager for custom forms (eForms) is a separate permission that can be enabled/disabled per user basis.

A manager in eForms can oversee other users open & completed forms in the home screen. You may assign as many users as you would like under a manager.

Note: You may also create multiple users as managers and may have a scenario where a user with a manager role oversees another user with a manager role.

The permission to become an eForms manager / custom forms manager is set up in the eForms module.

To setup the permission for deleting a form, follow the steps below:

1. Access the eForms module.
2. Access the Setup menu.
3. Access the Users menu.
4. Click on the username in question that requires the change.
5. Scroll all the way down and enable the permission 'Interactive Form'

The screenshot displays the 'Edit User Account' page. On the left is a navigation sidebar with items: Home, Templates, Setup, Reports, Razvan, eForms, Support Center, Tasks, and Logout. The main content area is titled 'Edit User Account' and contains the following fields and options:

- Username: [text input]
- First Name: [text input]
- Middle Initial: [text input]
- Last Name: [text input]
- Phone: Phone # [text input] ext. [text input]
- Email: [text input]
- User Role: Custom [dropdown menu]
- Products: AlarmBiller Time & Attendance eForms Sales Automation Sedona-X Mobile app

Below these fields are two tabs: 'Permissions' and 'Services'. The 'Permissions' tab is active and shows 'User Security Permissions:' with a list of 'Custom Forms' permissions:

- Design Form
- Delete Form
- Interactive Form Ability to fill out and sign a form.
- E Forms Manager
- Send Form

Note: This permission requires the user to log out completely and log back in to take effect.