

**QUICK REFERENCE GUIDE**

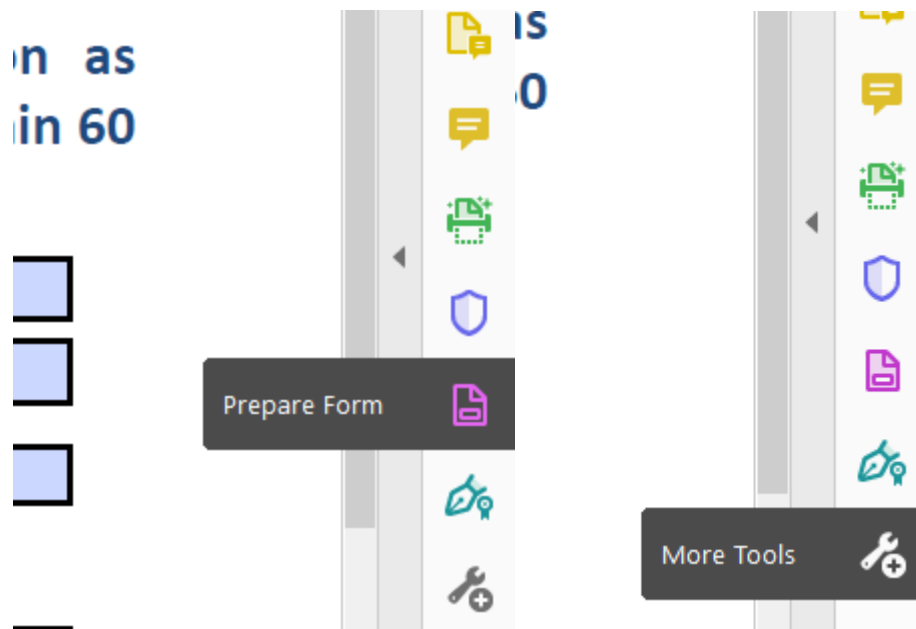
Table of Contents	
I.	<a href="#">General Information</a> – pg. 1
II.	<a href="#">Adding a Digital Signature Field to a PDF</a> – pg. 1-3
III.	<a href="#">Creating an Adobe Digital Signature ID</a> – pg. 4-6
IV.	<a href="#">Using a Digital Signature to Sign a Document</a> – pg. 7
I.	<a href="#">Troubleshooting – Document is locked for editing/signing</a> – pg. 8

## I. General Information

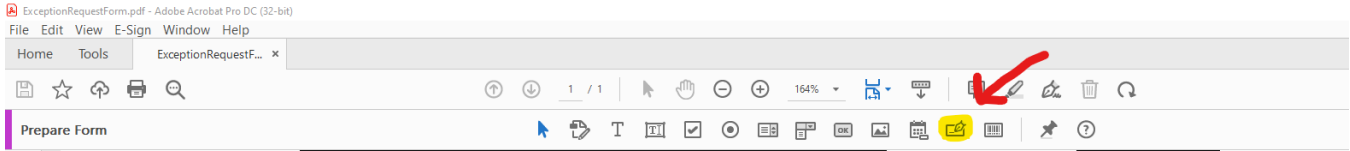
1. Digital signatures are now preferred or required for most university documents. Digital signatures are more secure than “wet” signatures, when used in the correct way. Wet signatures can easily be forged and tampered with, while electronic signatures have many layers of security and authentication built into them. In Adobe, using a certified digital signature links the signature to the signer’s Adobe account, and even puts an exact timestamp on the signature.

## II. Adding a Digital Signature Field to a PDF

1. Open the PDF document you wish to add the signature field to in Adobe
2. Click on the “Prepare Form” tool in the tool ribbon to the right, or if this tool is not available in your tool ribbon, click “More Tools” to add it



- Once the "Prepare Form" tool is open, click on the "Add digital signature" button located on the top ribbon



- Add the digital signature box to area desired

**By requesting approval for a preventable situation, include department procedures put into place to prevent a recurrence.**

**Contact Information:**

Name:

Email Address:  Phone Number:

**Approval(s):**

Traveler signature:  Date:

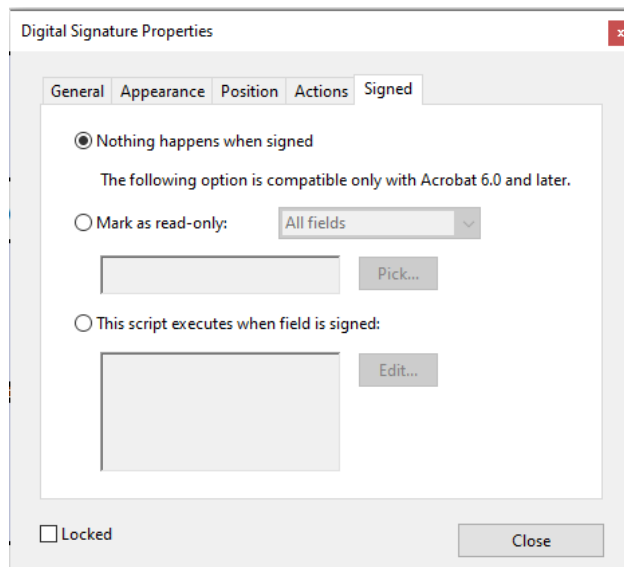
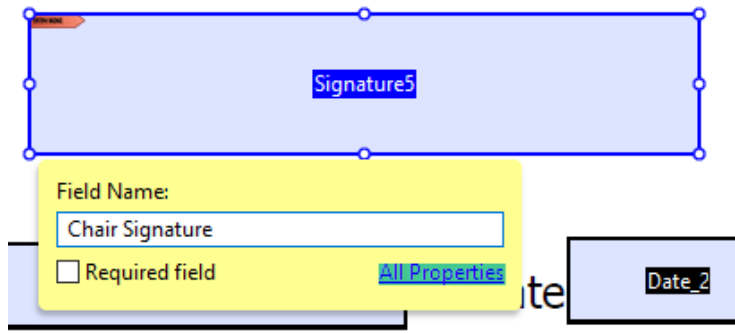
Procard Owner (signature):  (printed)  Date:   
(If reason #5 selected)

Business Officer (signature):  (printed)  Date:

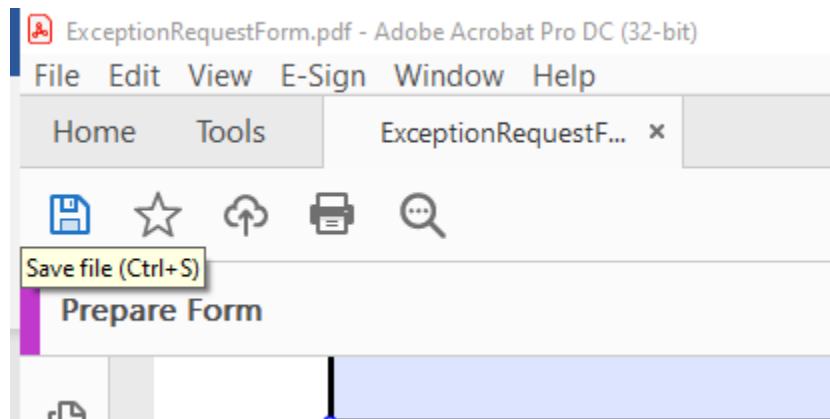
Administrative, Provost, EVPHA or EVPFA (when required):  Date:

University Financial Services:   Date:


- The field properties can be altered as necessary. If other signatures are required later on, ensure that the signature field is not marked as "locked" or "read-only". If these fields are checked, you will not be able to obtain further signatures or edit the document after signing.

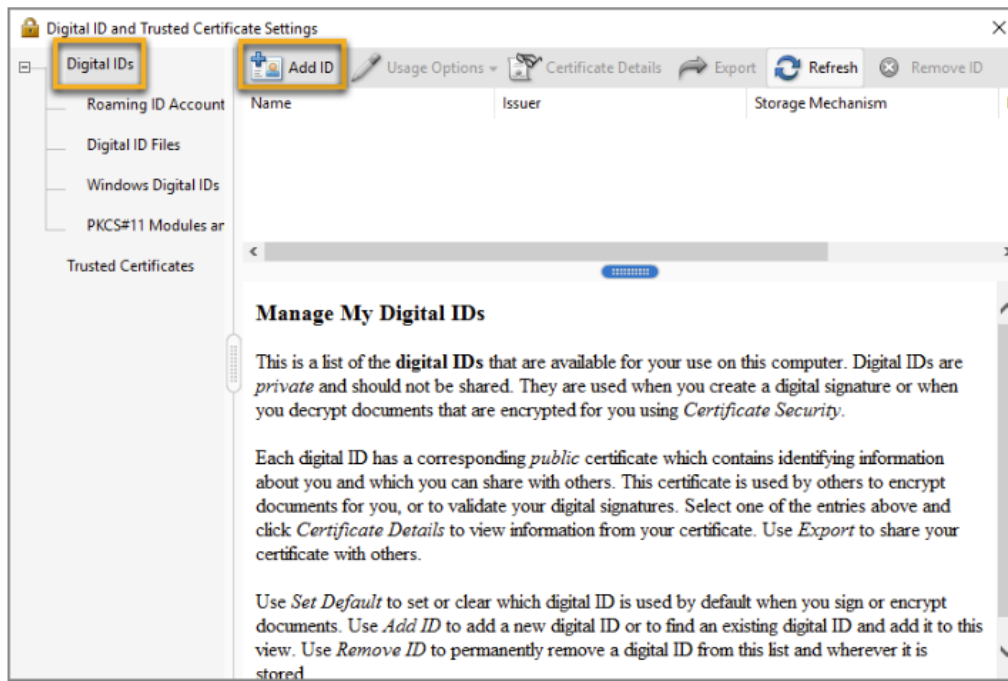


6. Save the edited form to apply your changes. Your signer should now be able to add their digital signature!

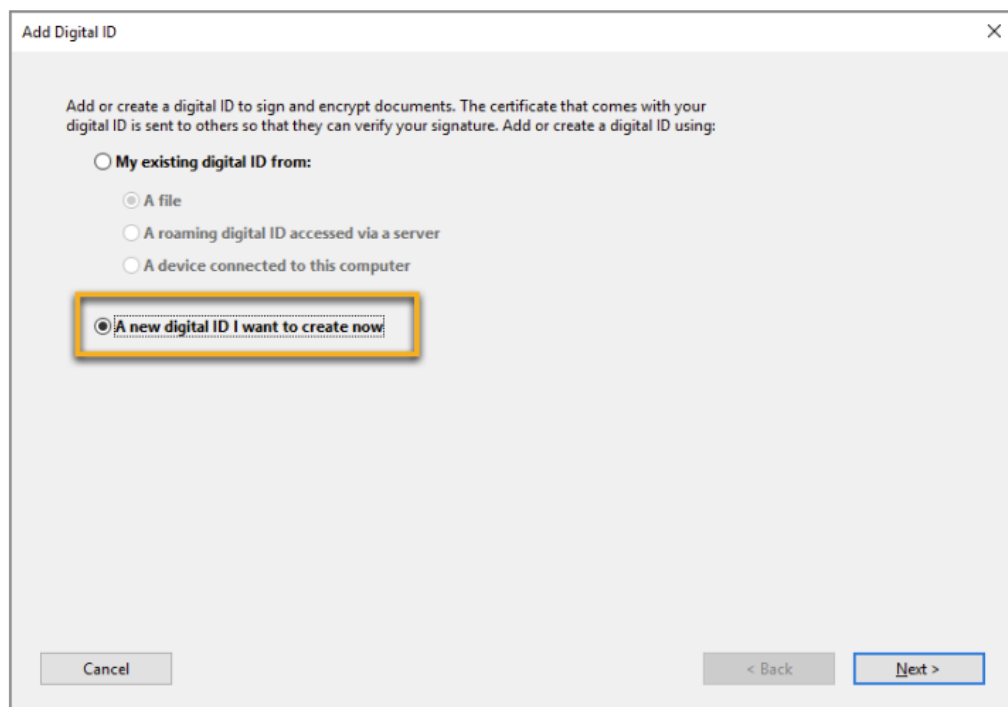


### III. Creating an Adobe Digital Signature ID

1. In Acrobat, click the Edit menu and choose **Preferences > Signatures**.
2. On the right, click More for **Identities & Trusted Certificates**.
3. Select **Digital IDs** on the left, and then click the **Add ID** button .

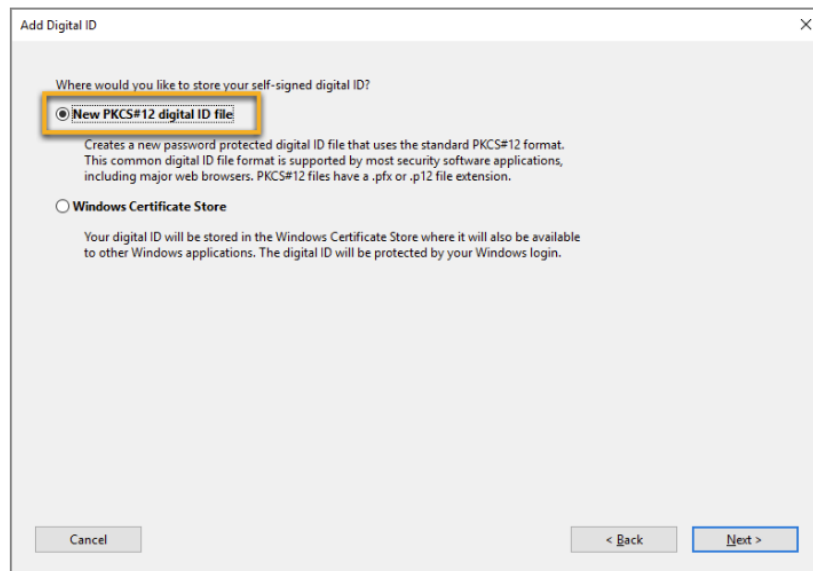


4. Select the option **A New Digital ID I Want to Create Now**, and click **Next**.



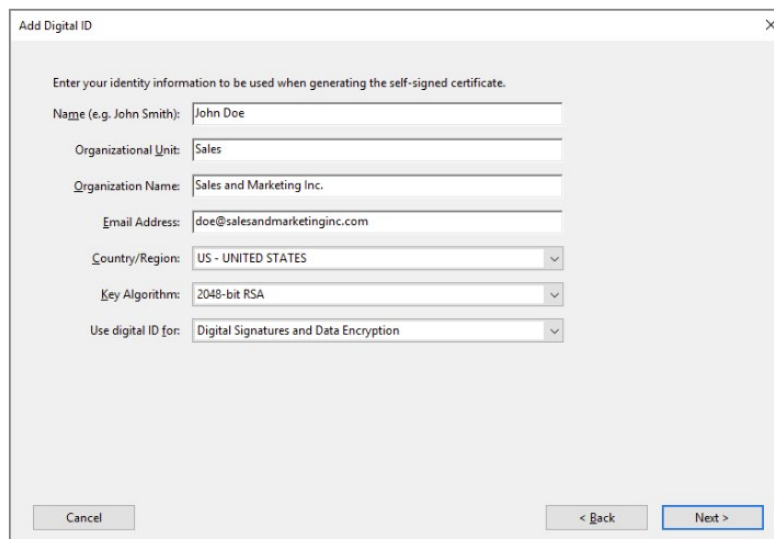
5. Specify where to store the digital ID, and click **Next**.

- **New PKCS#12 Digital ID File**
  - Stores the digital ID information in a file, which has the extension .pfx in Windows and .p12 in Mac OS. You can use the files interchangeably between operating systems. If you move a file from one operating system to another, Acrobat still recognizes it.
- **Windows Certificate Store (Windows only)**
  - Stores the digital ID to a common location from where other Windows applications can also retrieve it.



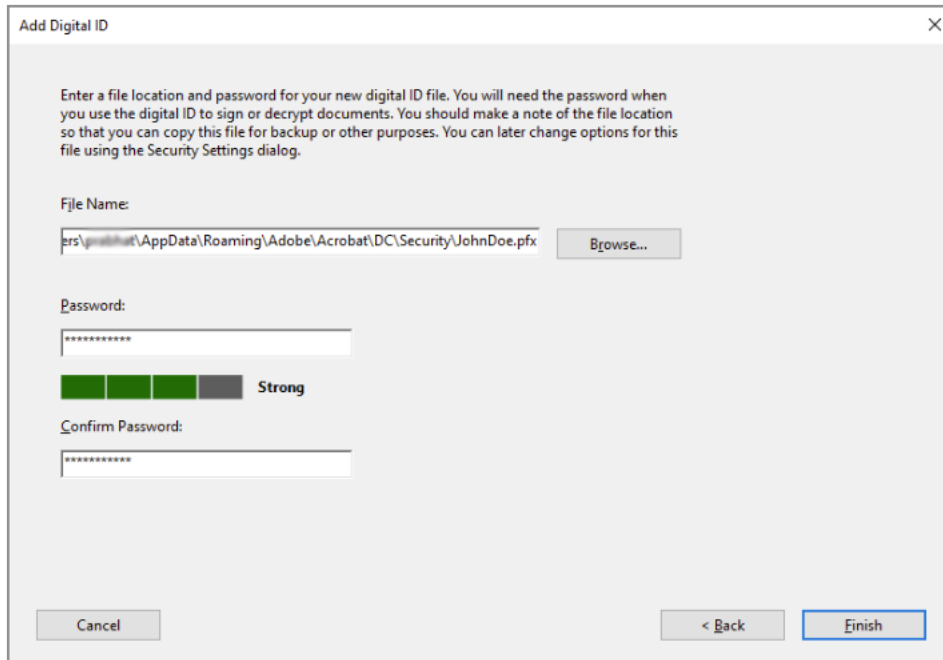
6. Do the following:

- Type a name, email address, and other personal information for your digital ID. When you certify or sign a document, the name appears in the Signatures panel and in the Signature field.
- Click Next.

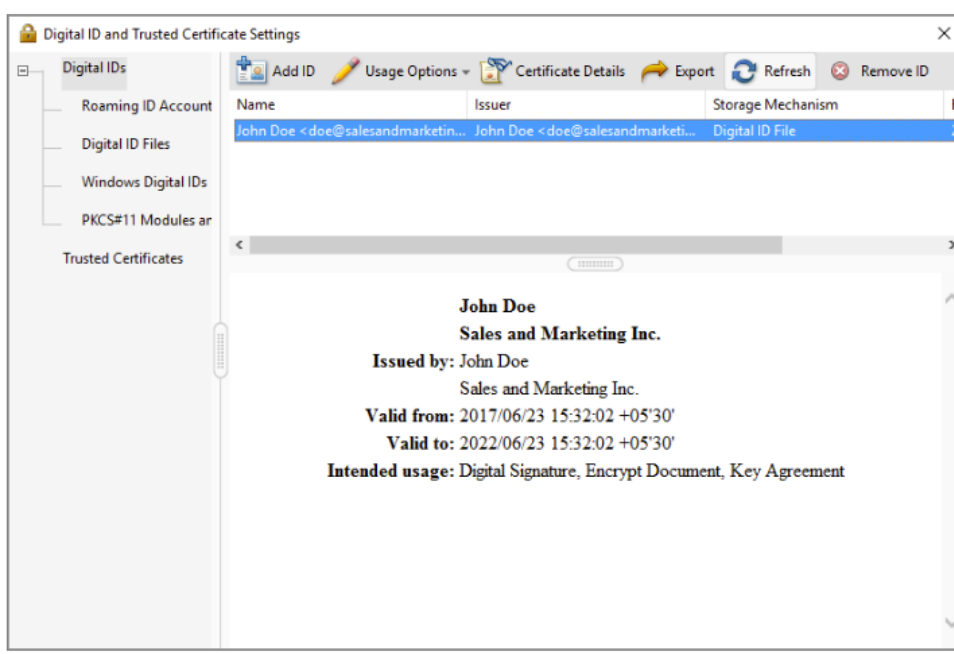


**7. Do the following:**

- Type a password for the digital ID file. For each keystroke, the password strength meter evaluates your password and indicates the password strength using color patterns. Reconfirm your password.
- The digital ID file is stored at the default location as shown in the File Name field. If you want to save it somewhere else, click Browse and choose the location.
- Click Finish.



- 8.** The ID is created. You can export and send your certificate file to contacts who can use it to validate your signature.



## IV. Using a Digital Signature to Sign a Document

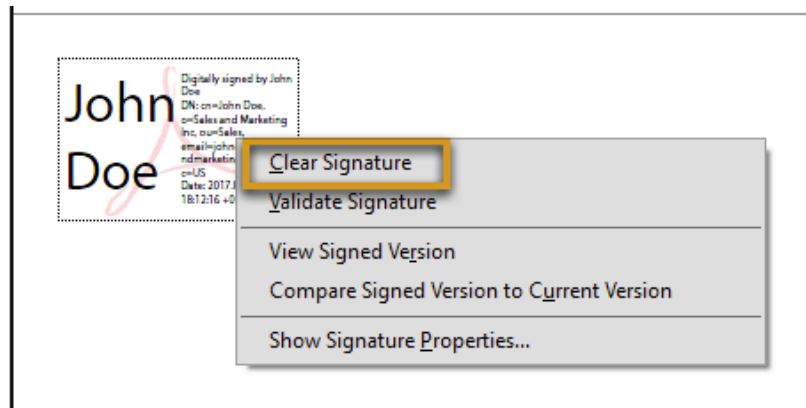
1. The first signer will need to download the form from their web browser or email and open with Adobe.
2. There are two options to complete the signature.
  - 1st Option - The signer can simply click on the pre-created digital signature box, if available.
  - 2nd Option - The signer can select the "certificates" tool (select "more tools" to add "certificates" if it is not available in your tool ribbon).
    - If you do not have a saved Adobe signature, you will need to create one. See section III for instructions.
3. Save a new copy of the document with the digital signature added and send to the appropriate person.

## V. Troubleshooting – Document is locked for editing/signing

1. If further signatures are needed, be sure you have not selected the "lock document after signing" option. Selecting this option allows no further edits to be made or signatures to be added to the document. (Example below)



2. If you are the only one signer, you can remove the signature and make any needed edits.
  - To remove your signature, right-click the signature and then choose Clear Signature.



3. If multiple signatures are needed and the document is locked after the first signature, there is no other option than to create the PDF again or request the blank PDF from the owner. Generally, the PDF is locked for editing, but not for signing unless you or the first signer chooses the Lock document after signing option while signing.