

Orange Coast College

How To Sign Documents Digitally

Step by Step Guide

OCC Business Office
3-30-2020

Contents

General Information	2
Background Information	2
Locked PDF	2
Fillable PDFs	2
Digital Signatures	2
How to Digitally Sign Locked Documents (does not have a designated field for signatures).....	3
Setting up Your PDF Reader	3
Signing Your Document.....	6
How to Digitally Sign Fillable Documents (does have a designated field for signatures).....	9
Additional Notes	12

General Information

In a brief explanation, here at the college we are focusing on using PDFs and the main file type when submitting and approving documents. In general, we have two main types of PDFs, locked and “flattened” PDF’s, and “fillable” PDF’s (can be edited/modified).

Background Information

Locked PDF

These types of PDFs are the everyday PDF files most of us work with daily. The original information of the document itself can’t be altered, hence why it is referred to as “flattened” (there is only one layer of content). It is possible to overlay additional text, pictures, etc. on top of these types of PDFs creating layers.

Once a layer has been added (or multiple layers), it can then be saved either “locked”, which will flatten this new saved file into one single layer and won’t be editable for others.

If the file is saved as “unlocked” (or the “locked” option is left unchecked), then the next recipient can add/modify/edit/etc. the document.

Examples Specific to the College:

- Invoices from vendors
- Quotes from vendors
- Digital brochures
- ET’s (to an extent)

Fillable PDFs

These are the PDFs that open-up and have designated fields for a user to enter information. Fields are generally designed to contain certain type of information. Sometimes only text may be entered, sometimes only numbers, and sometimes it may be a drop-down menu which only allows the user to select from a specific range of choices. As it pertains to our purposes, some fields are specifically dedicated for digital signatures.

Once information has been entered, these types of files can be saved as “locked”, or “unlocked”. If signing the document, when the digital signature is applied, and the “Lock Document after signing” is check/marked, then it is flattened (as referred to earlier) and no changes can be made to it. If the file is saved as “unlocked”, then all information is saved, but can be modified by the original creator or anyone else that has that file.



Examples Specific to the College:

- Direct Pay Requests
- Change Order Requests

Digital Signatures

Digital signatures are personalized identification “stamps” that are as unique to individuals, as signatures. *Adobe* (the program we use for our PDFs) has a way of creating this digital “stamp”. These signatures are information embedded in them that certifies the user. These are generally accepted throughout the business world as valid as actual signatures.

Everyone should have been provided a link to create a digital signature, which should be stored on your individual computer. This will be required to approve and “sign-off” documents since we are migrating to a completely (or as close to as possible) digital organization. If you need help creating a digital signature, please let us know here in the Business Office and will arrange a meeting or call to get you set up.

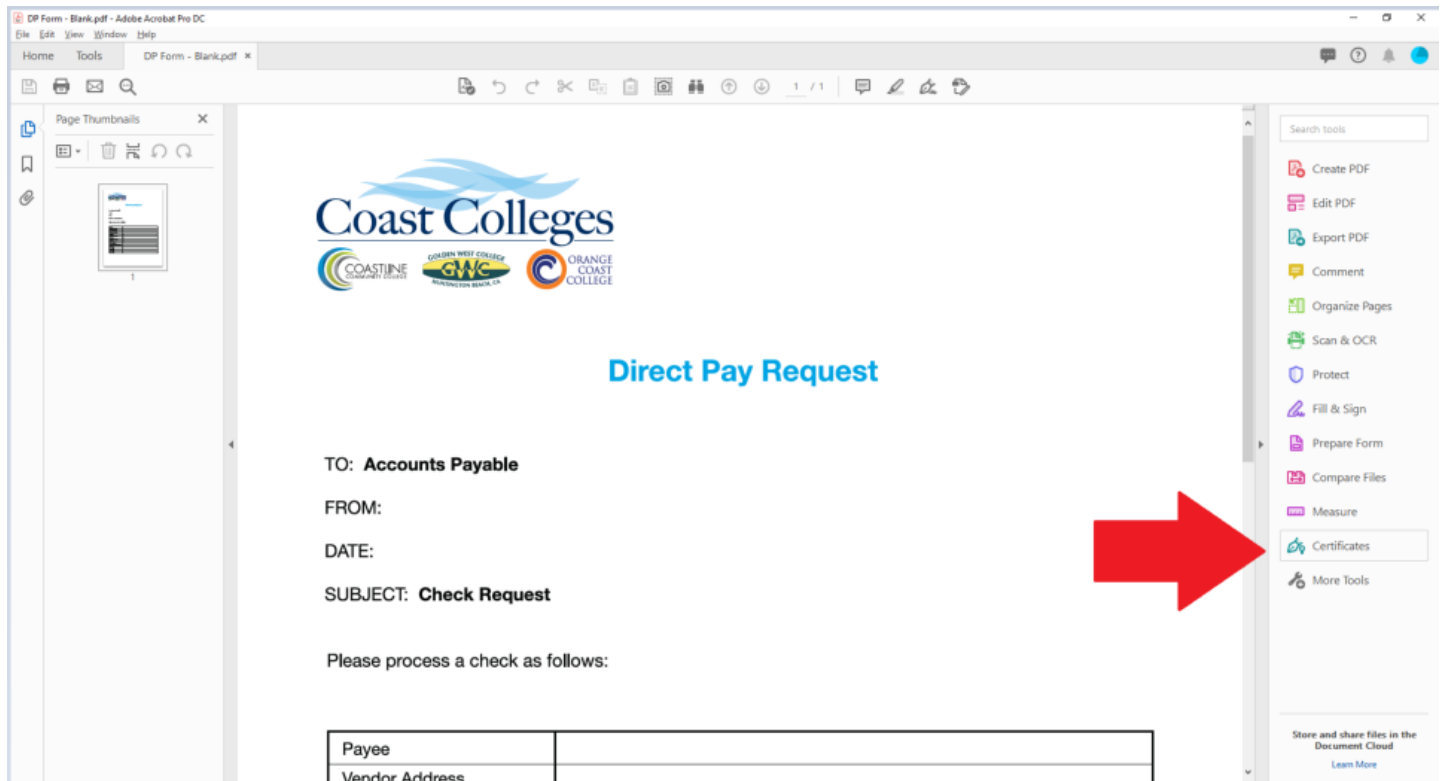
How to Digitally Sign Locked Documents (does not have a designated field for signatures)

This method works whether there is a dedicated “Signature” field on the document.

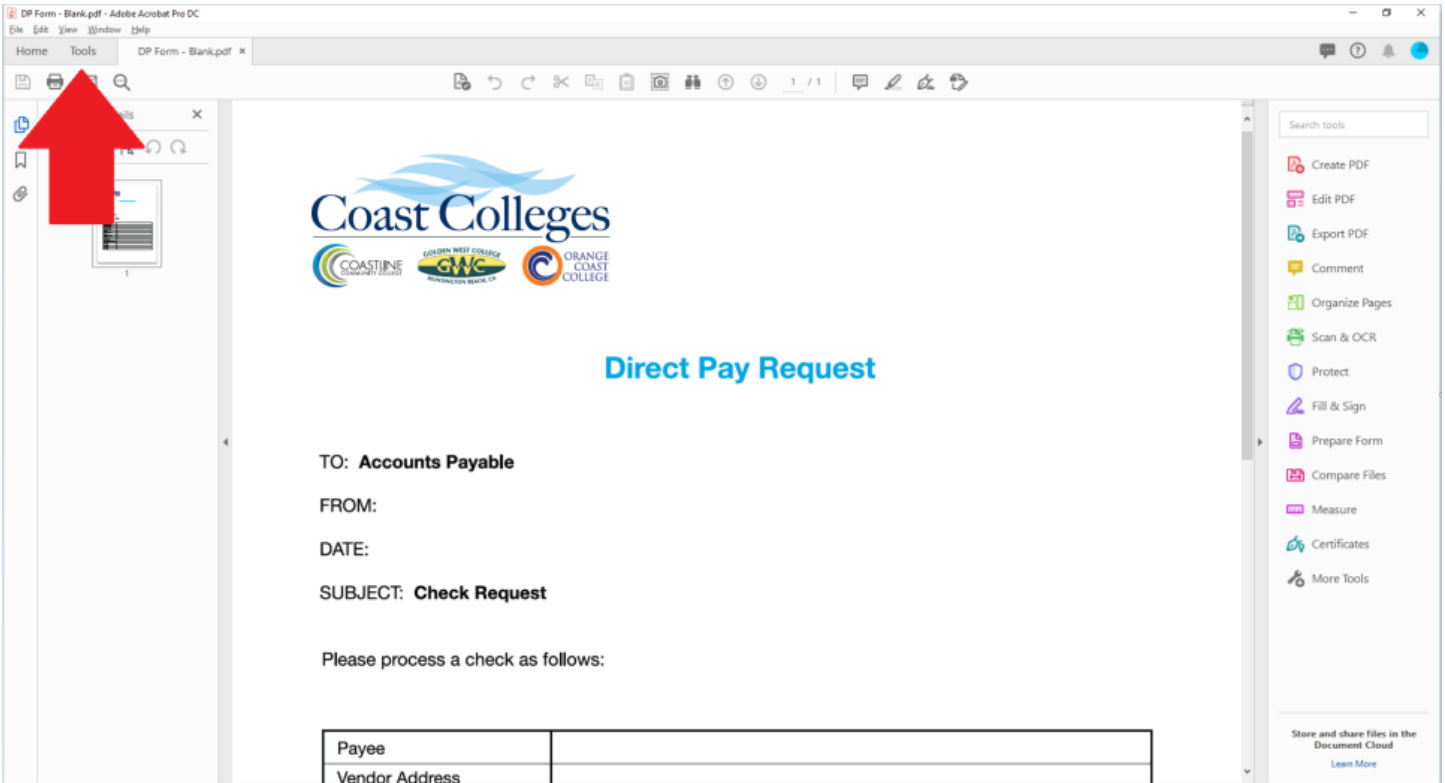
Setting up Your PDF Reader

In order to sign documents using your newly created digital signature, the “Certificates” tool should be readily available in your toolbox as illustrated below. If it is not there by default, follow these steps. This will only have to be done once and each time after, the tool should appear automatically when ever a PDF is opened.

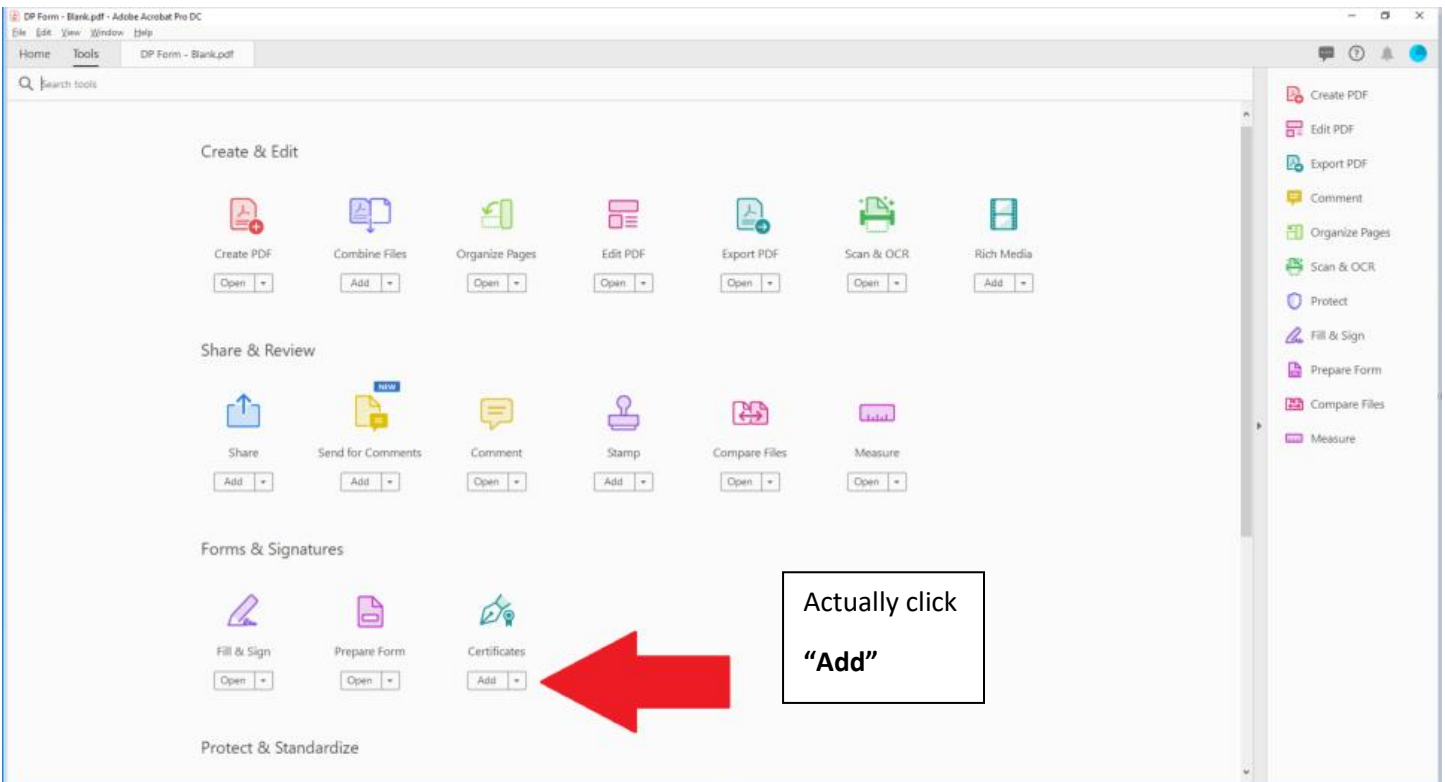
*****If it doesn't appear as shown below, follow all the steps (this will only need to be done your first time)*****



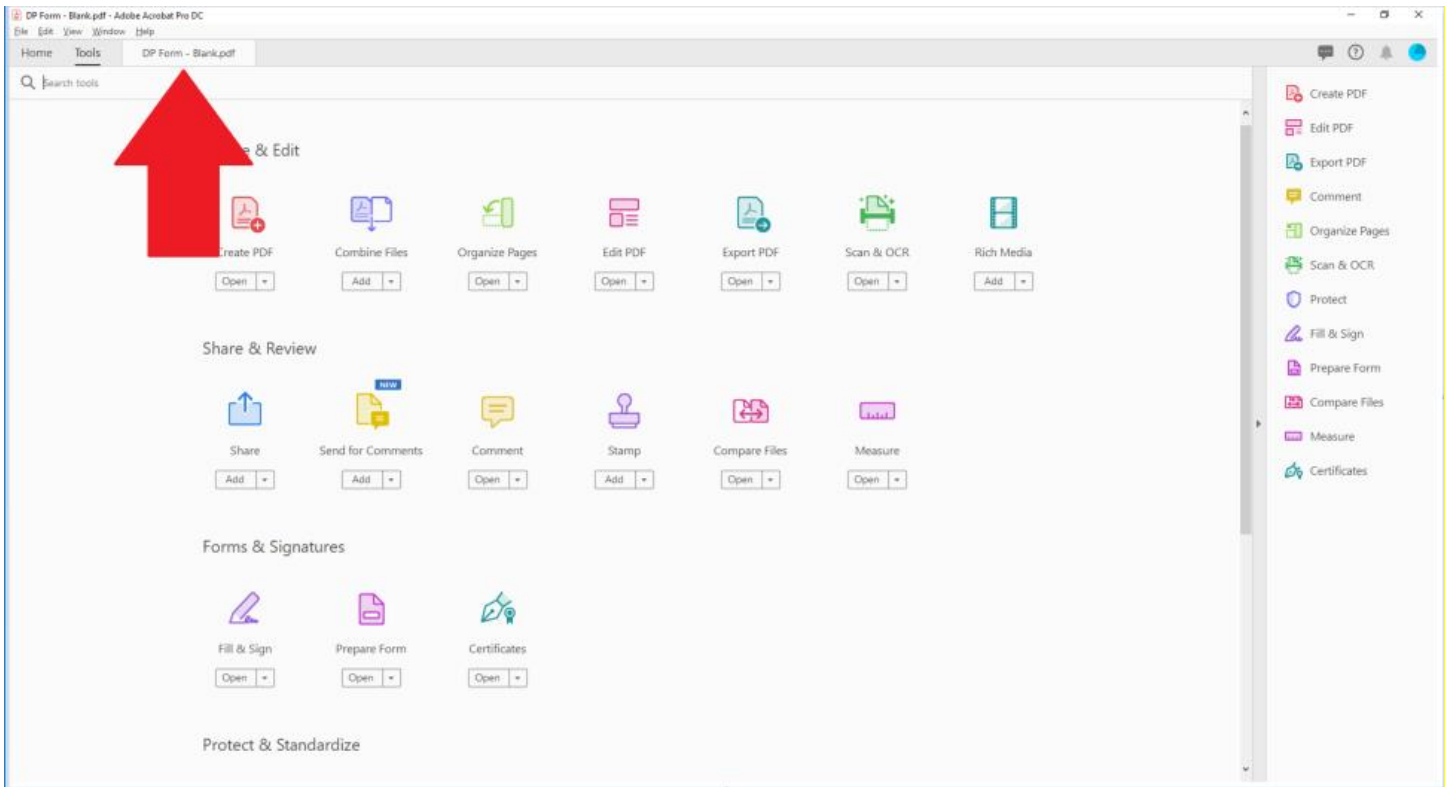
1. Click on “Tools” at the top right of the screen.



2. Click “Add” for the Certificates tool

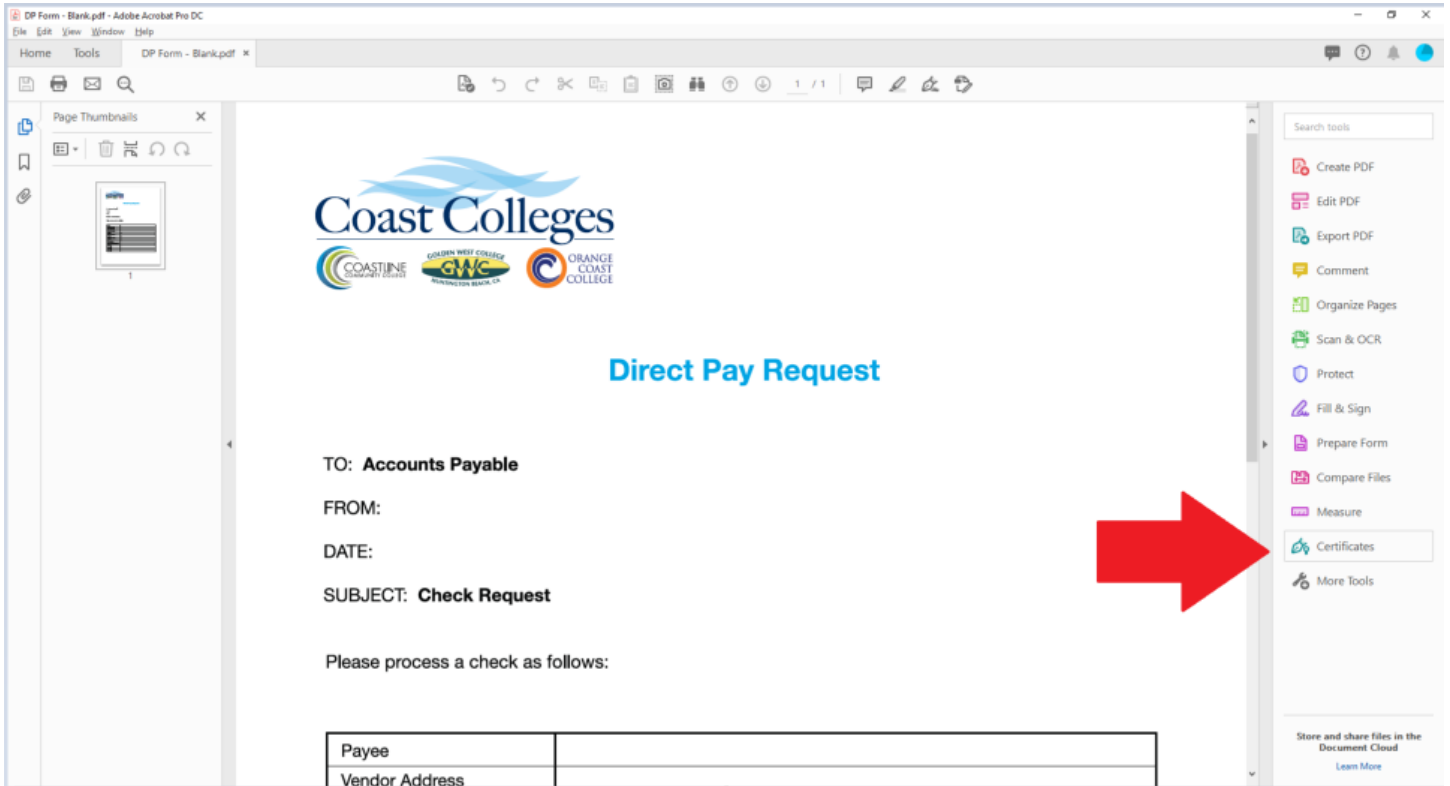


3. You can now go back to the document you need to sign.

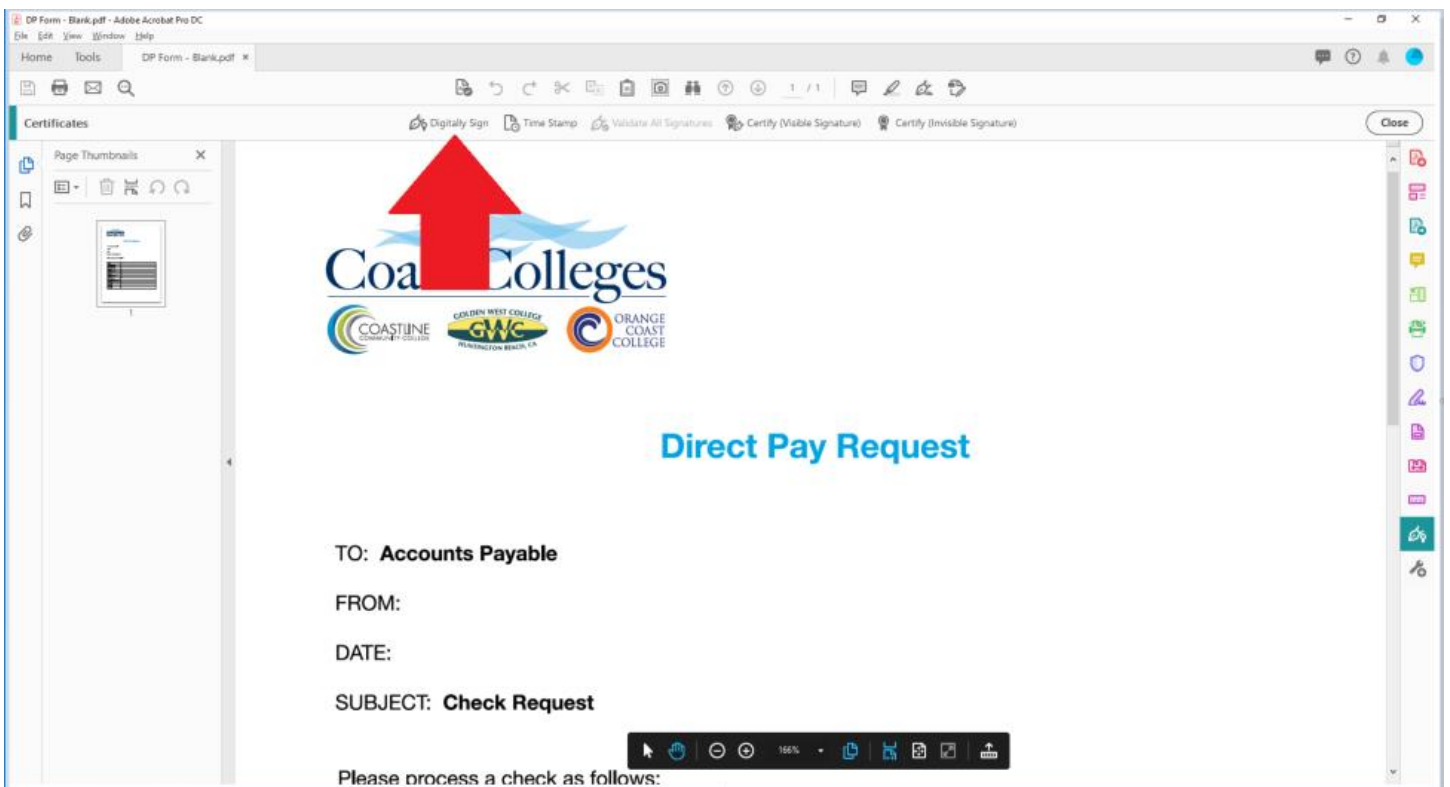


Signing Your Document

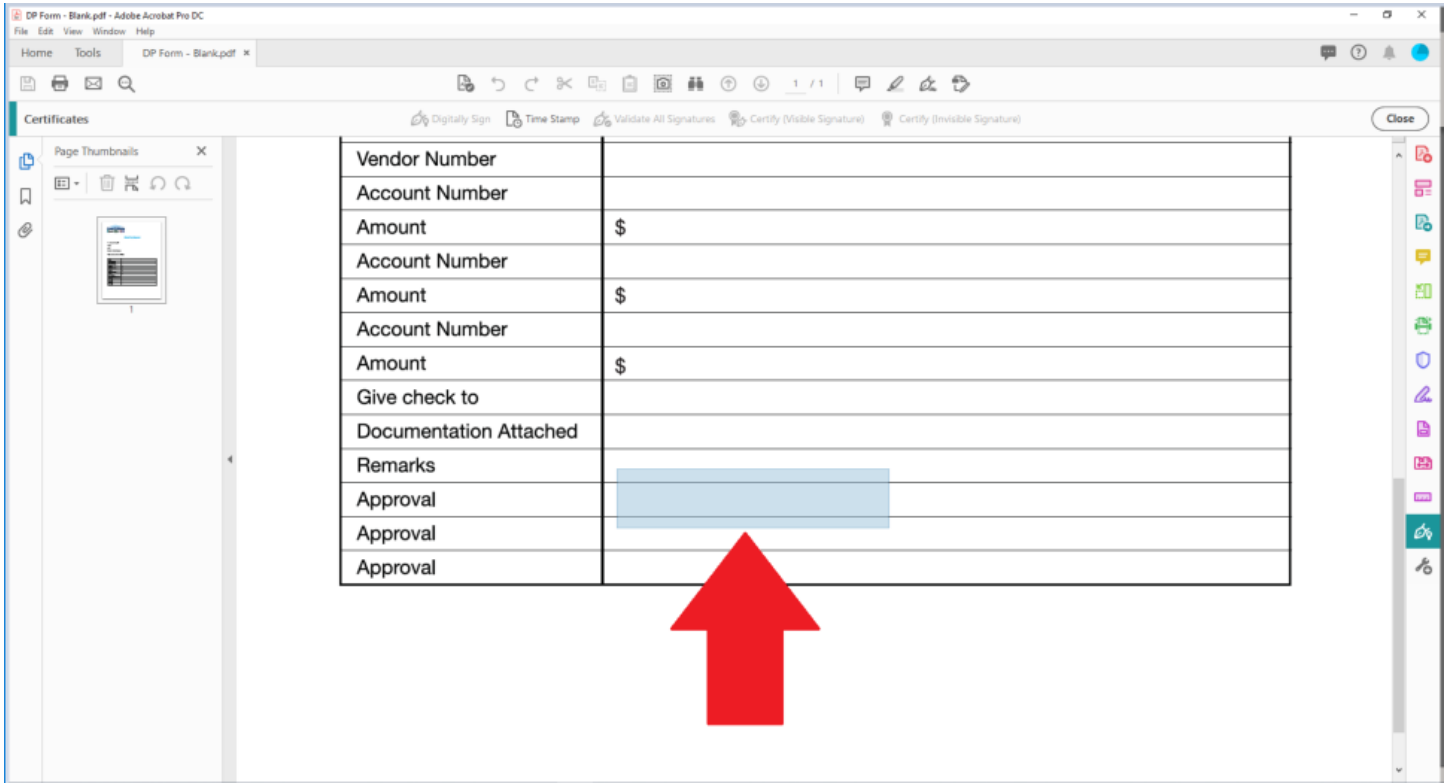
1. Click the "Certificate" tool



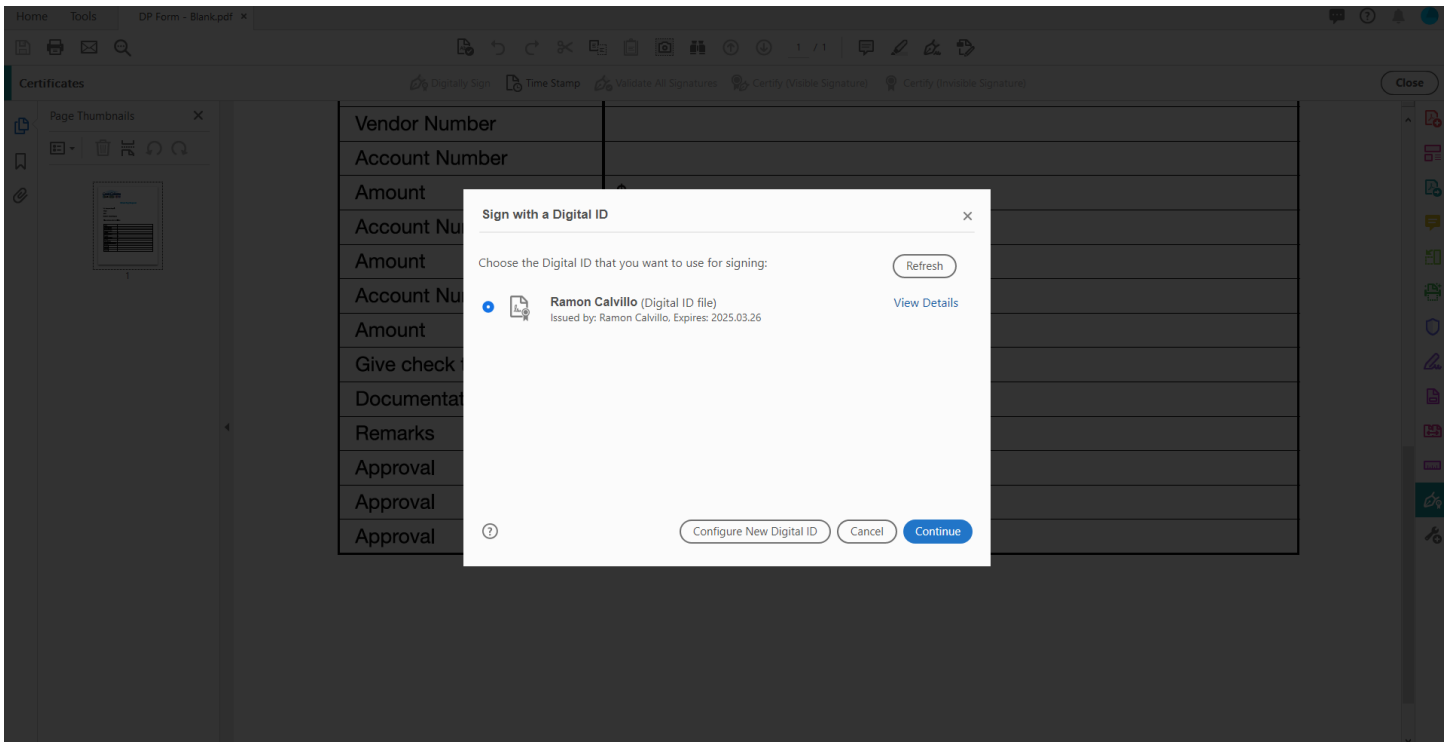
2. Click the "Digitally Sign" button.



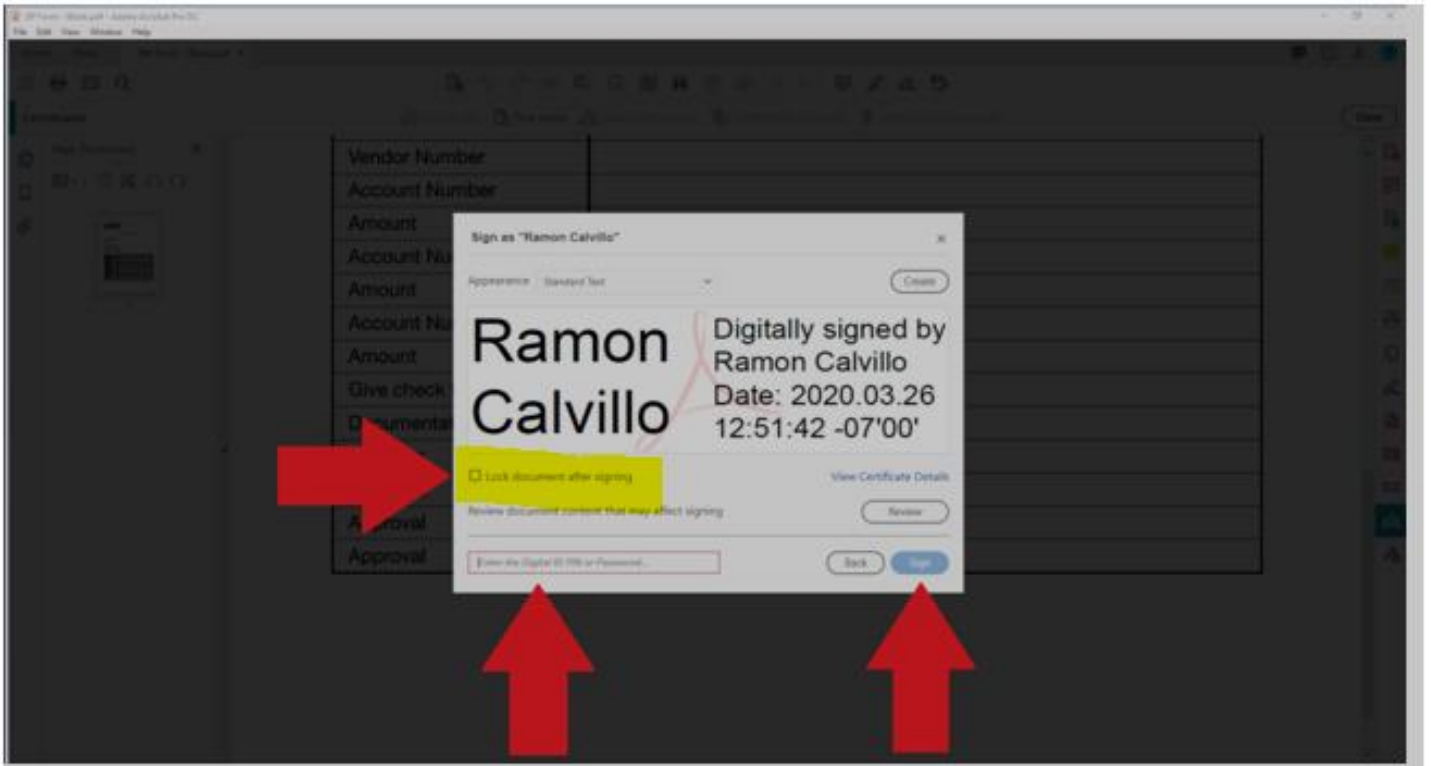
3. **Click and Hold** the mouse to create a box in the exact place where you would like your digital signature to be, then release.



4. A dialog box will appear showing all the available signatures on that computer. Select the one you wish to use, then click "Continue".



5. Since these documents will need multiple signatures, *****DO NOT***** lock the documents. Enter your digital signature password (the password entered when creating your digital signature) and click “sign”

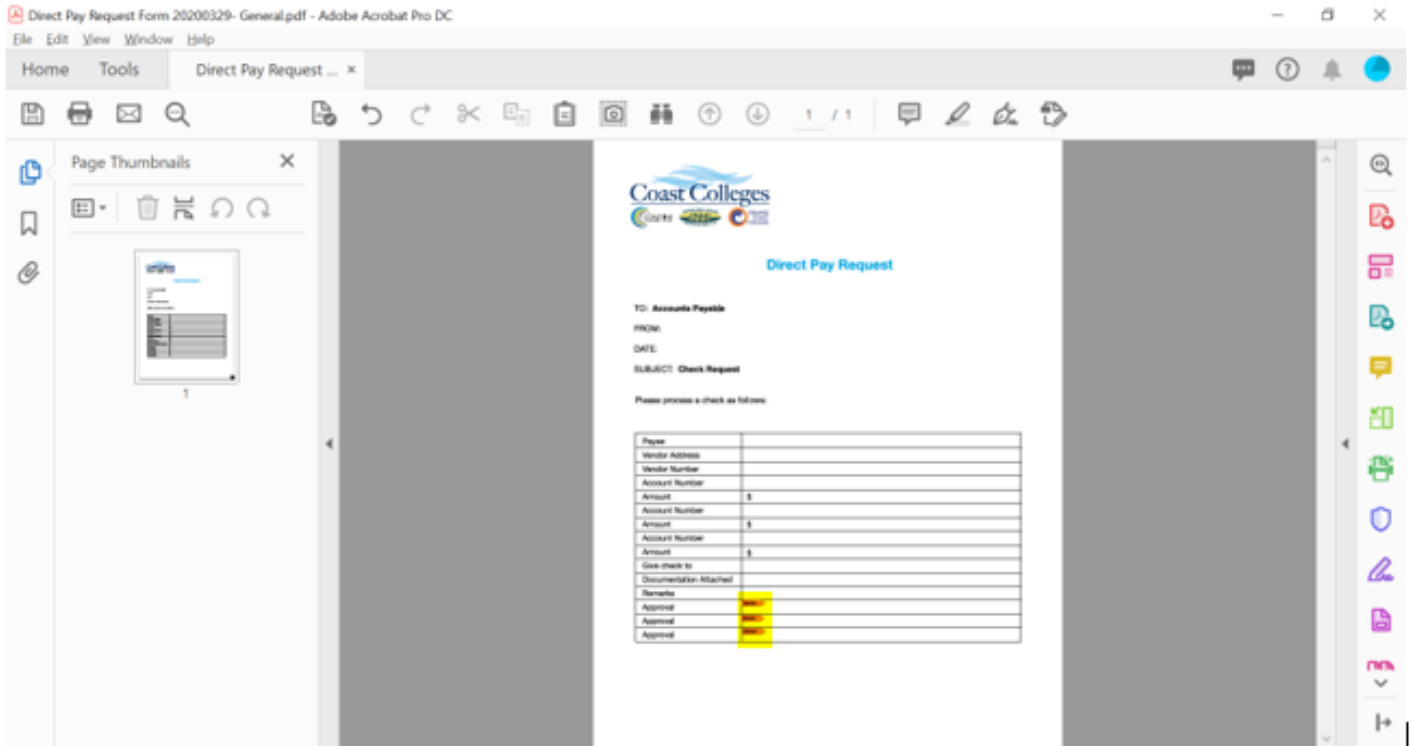


Adobe will prompt you to save a copy. You can save this wherever you like (I suggest modifying the file name to include “signed”). This is your copy.

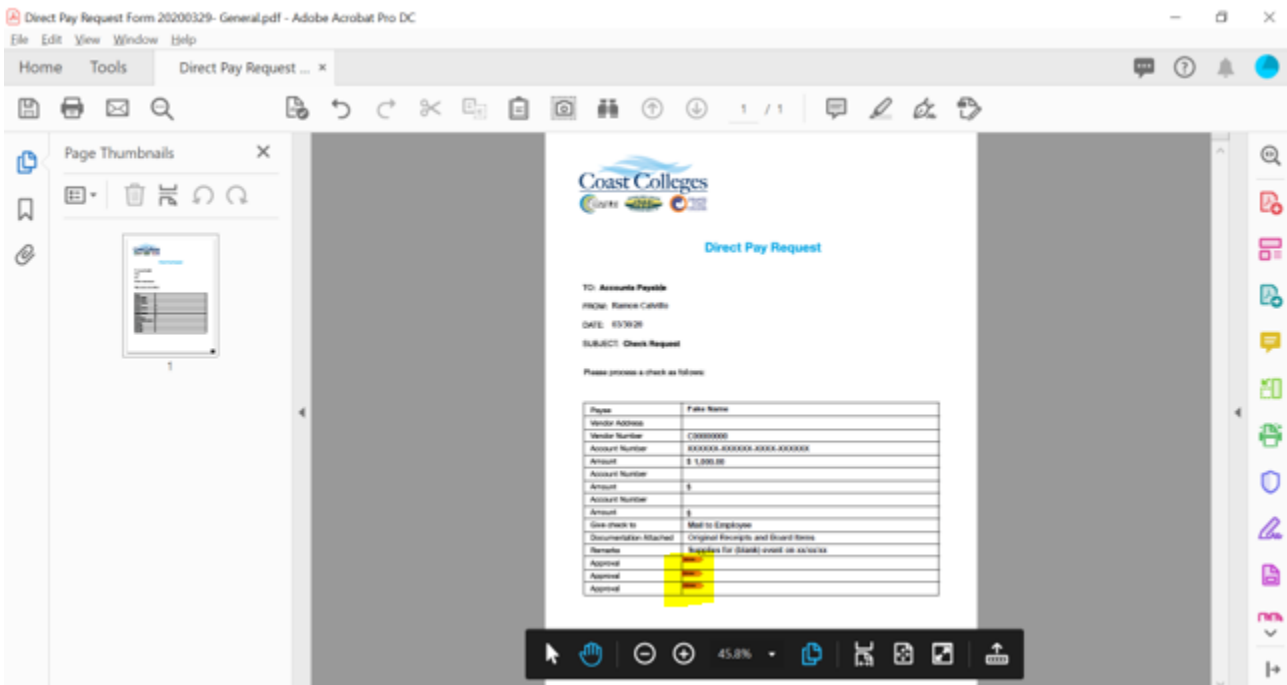
6. Your document is now signed. Please forward to the next approver for signatures (this is the reason the document shouldn't be locked as the next person will repeat these steps).

How to Digitally Sign Fillable Documents (does have a designated field for signatures)

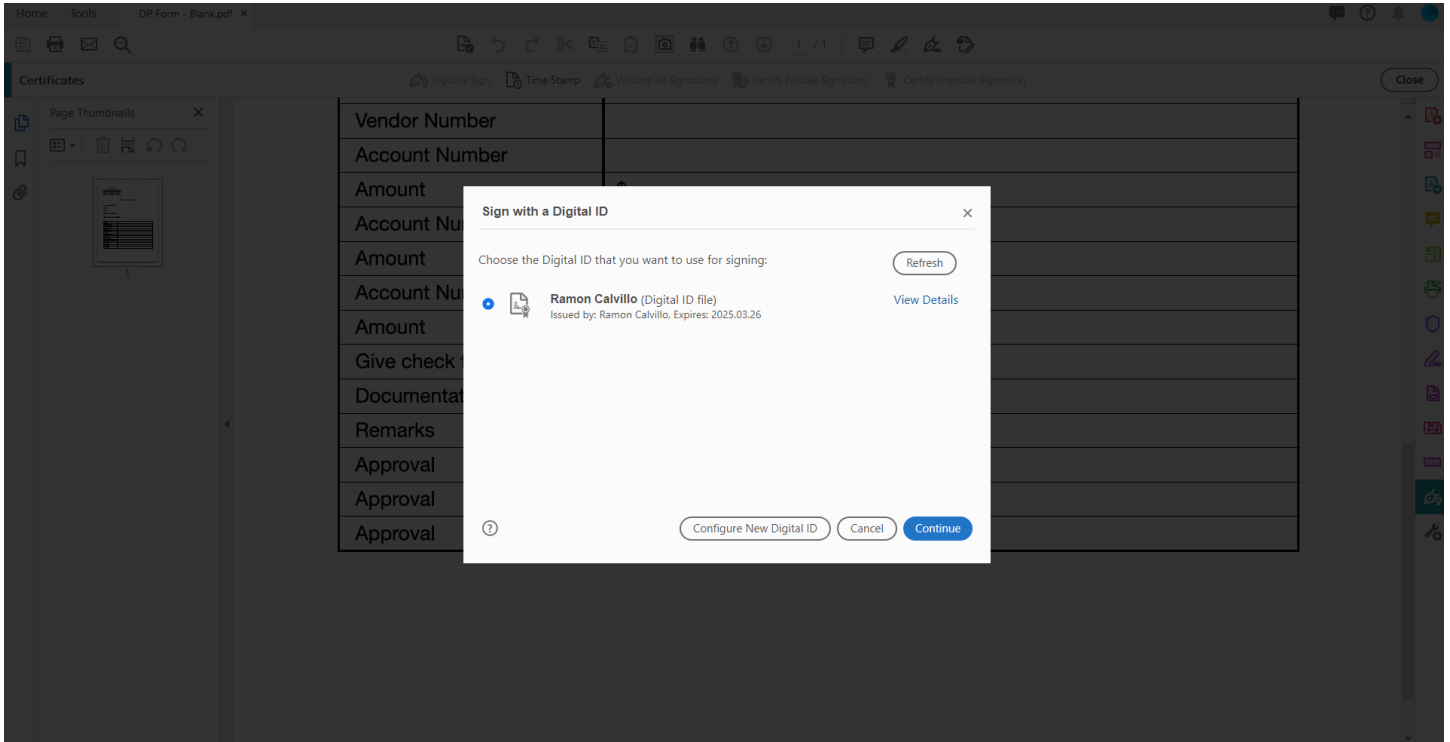
1. Open your file



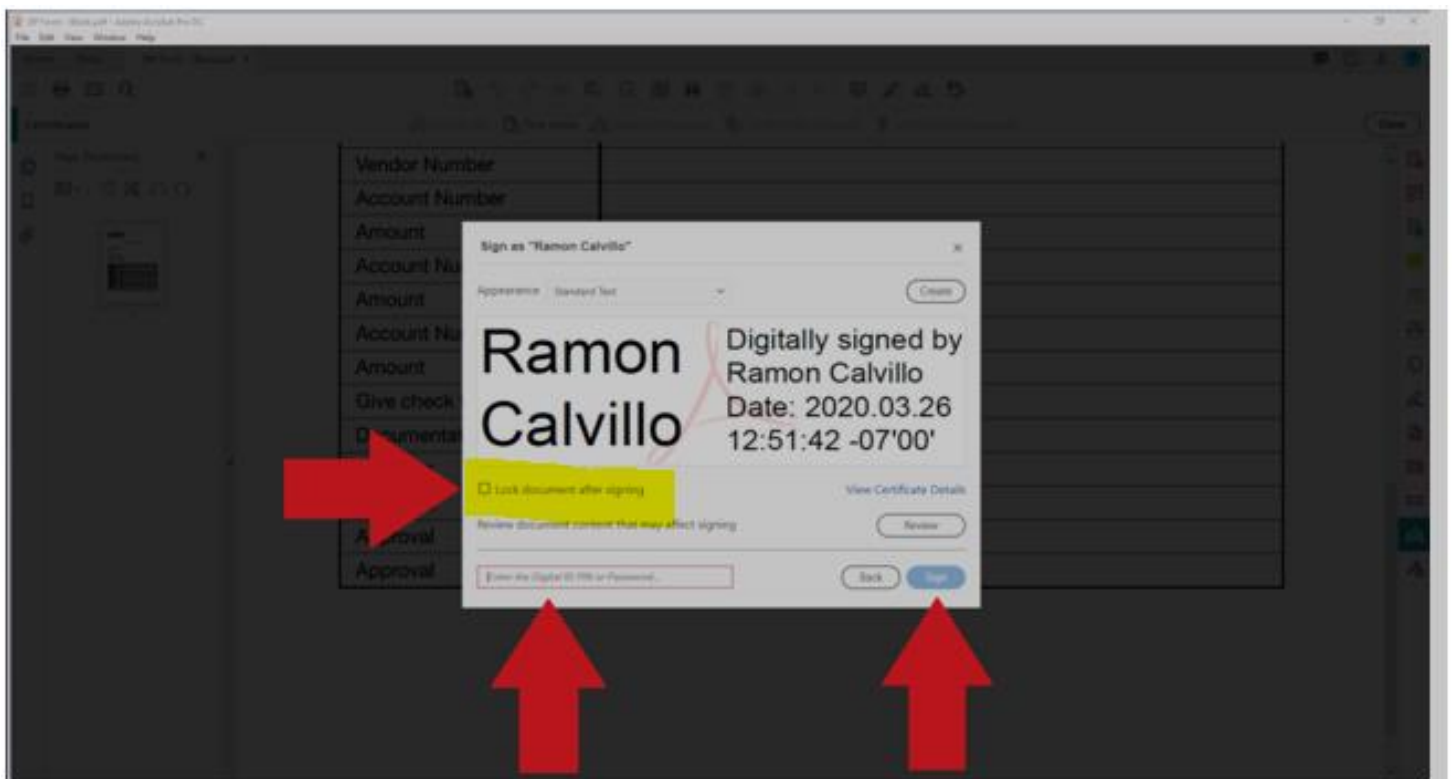
2. Fill out the required information



- Click directly into the signature field. A dialog box will appear showing all the available signatures saved on that computer. Select the one you wish to use, then click “Continue”.



- Since these documents will need multiple signatures, *****DO NOT***** lock the documents. Enter your digital signature password (the password entered when creating your digital signature) and click “sign”



Adobe will prompt you to save a copy. You can save this wherever you like (I suggest modifying the file name to include "signed"). This is your copy.

5. Your document is now signed. Please forward to the next approver for signatures (this is the reason the document shouldn't be locked as the next person will repeat these steps).

Additional Notes

The reason it is asked for you not to lock your PDFs is because the documents will need to be digitally signed by approvers, the exact same way as if a hard copy of the form was submitted. Because they won't be locked, please keep tight control of these PDF and **ONLY** forward the signed versions to the next approver or to the Business Office.

Be aware, since the document is not locked, information can be changed/altered by anyone with access to that file AFTER it has been digitally signed.

If you are the only one required to sign (such as signing off invoices), they you **CAN** lock the document.

Any questions, please feel free to contact me:

Ramon Calvillo

rcalvillo@coastline.edu

X16632