

E-Signatures How-to Guide

Contents

A) Adobe Acrobat Reader with a digital ID	2
B) Adobe Acrobat Reader with a stamp.....	5
C) Embedded signature image in a document.....	5
D) Wet signature and scan a document.....	6
E) Sign and Fill Function in Adobe Acrobat Reader.....	7
F) Email with signature block.....	11
G) Save Emails to PDF	12

Note:

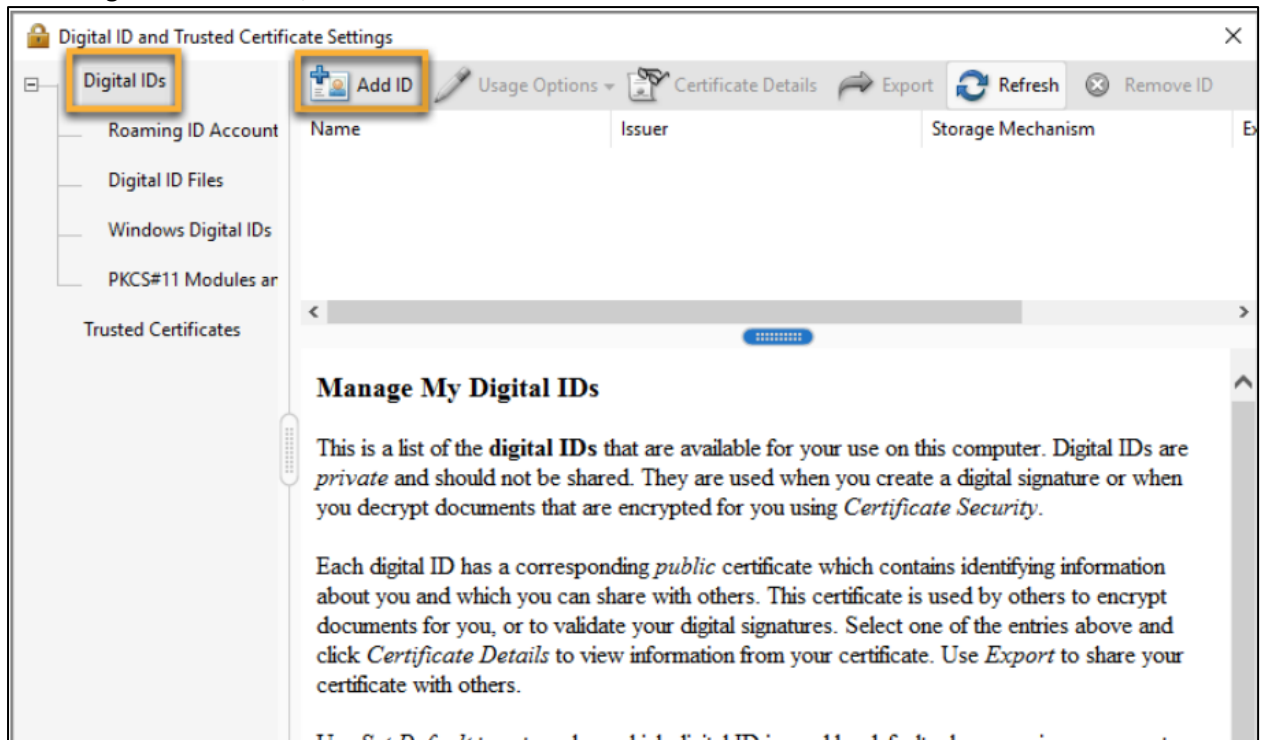
This guide is based on Adobe Acrobat Reader DC (Document Cloud) version 2021. Please note there might be a few variations in the steps based on the version on your desktop/laptop.

A) Adobe Acrobat Reader with a digital ID

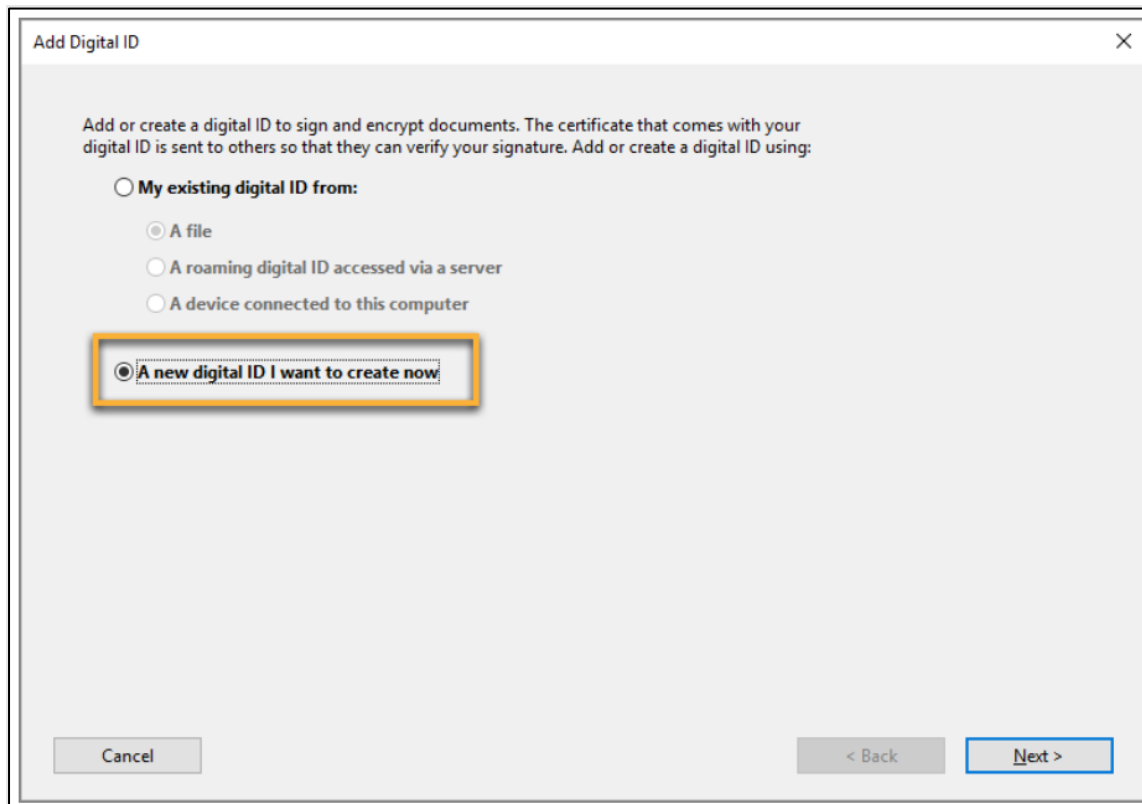
1. [Install Adobe Acrobat Reader](#). If you don't have it already, please contact your local Administrator for installation of the latest version of Adobe Acrobat Reader.

2. Obtain a Digital ID

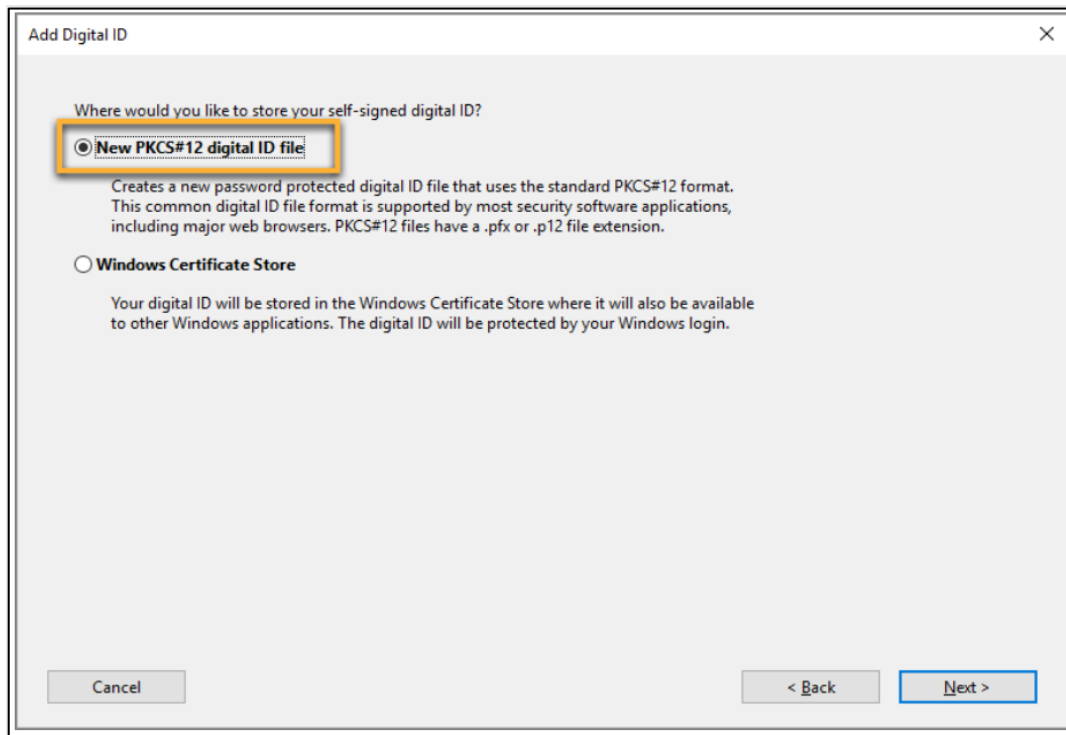
- Open Adobe Acrobat Reader.
- Go to "Edit" in the menu bar and select "Preferences."
- In the Preferences window, select "Signatures" from the left-hand side.
- Under the "Identities & Trusted Certificates" section, click on "More..."
- In the Digital IDs window, click on "Add ID"




- Select the radio button "A New Digital ID I want to create now".



- Click Next
- Choose the type of digital ID you want to create (e.g., self-signed or certificate-based) and
- follow the prompts to provide the required information.
- Set a password for your digital ID to ensure its security.



3. Sign a Document

- Open the PDF document you want to sign in Adobe Acrobat Reader.
- Click on the "Fill & Sign" ( Sign) option in the right-hand pane.
- Select the "Sign" tool from the toolbar at the top of the screen. If a signature exists, select it from the dropdown.
- In the pop-up window, click on the "Place Signature" option.
- A rectangle will appear in the document where you can position your signature. Click within the rectangle to proceed.
- In the next window, choose the option to use your digital ID for signing.
- Enter the password for your digital ID when prompted.
- Once authenticated, you can select the appearance of your signature, such as hand-drawn, typed, or an image.
- Position and resize the signature within the rectangle, and then click "Apply."

4. Save and Finalize the Document


- Review the document to ensure your signature is placed correctly.
- Save the signed document by clicking on "File" in the menu bar and selecting "Save" or "Save As."

B) Adobe Acrobat Reader with a stamp

1. Install Adobe Acrobat Reader

If you don't have it already, please contact your local Administrator for installation of the latest version of Adobe Acrobat Reader.

2. Create a Signature Stamp

- Open Adobe Acrobat Reader.
- Go to "Edit" () in the menu bar and select "Preferences."
- In the Preferences window, select "Signatures" from the left-hand side.
- Under the "Identities & Trusted Certificates" section, click on "More..." next to "Create & Manage Stamps."
- In the Stamps window, click on "Create."
- Choose the option to create a custom stamp.
- Design your stamp by either selecting an image file or drawing a signature using the drawing tools provided.
- Adjust the size and position of the stamp as desired.
- Save the custom stamp with a recognizable name.

3. Sign a Document

- Open the PDF document you want to sign in Adobe Acrobat Reader.
- Click on the "Fill & Sign" option in the right-hand pane.
- Select the "Sign" tool from the toolbar at the top of the screen.
- In the pop-up window, click on the "Place Signature" option.
- Choose the option to use a stamp for signing.
- In the stamp options, select the custom stamp you created earlier.
- Position the stamp in the desired location within the document.

4. Save and Finalize the Document

- After placing the stamp, review the document to ensure its placement and appearance.
- Save the signed document by clicking on "File" in the menu bar and selecting "Save" or "Save As".

C) Embedded signature image in a document

1. Create or Obtain a Signature Image

- Create a signature image using an image editing software (e.g., Snagit) or a digital signature service. Ensure that the signature image includes the title and the department.
- Alternatively, you can scan your physical signature and save it as an image file (e.g., JPEG or PNG format).

2. Open the Document

- Open the PDF document you want to sign.

3. Insert the Signature Image

- Click Edit PDF.
- Locate the area in the document where you want to place the signature.
- Look for an "Insert Image" or "Add Image" option.
- Choose the option to insert an image and browse for the signature image file you created or obtained.
- Position and resize the signature image as needed within the document.

4. Adjust the Image Properties (Optional)

- Depending on the PDF editing software you are using, you may have options to adjust the properties of the signature image.

5. Save the Document

- Choose "Save" or "Save As" from the software's menu or toolbar to save the document.

D) Wet signature and scan a document

1. Prepare the Document

- Open the document you want to print and sign on your computer.
- Make any necessary edits or fill in the required information before printing.

2. Print the Document

- Go to the "File" menu and select "Print."
- Choose the appropriate printer and adjust the printing settings if needed.
- Click "Print".

3. Sign the Document

- Ensure that you sign within the designated signature area or wherever required.
- Allow the ink from your signature to dry completely before proceeding to avoid smudging.

4. Scan the Document

- Open the scanning software on your computer.
- Select the scanning options, such as file format (PDF, JPEG), resolution, and color settings.
- Preview the scanned image to ensure it is aligned and clear.
- Start the scan and wait for the process to complete.

5. Save the Scanned Document

- Choose a destination folder on your computer where you want to save the scanned document.
- Provide a name for the scanned file.
- Select the file format you prefer (e.g., PDF, JPEG).
- Click "Save" to save the scanned document to your computer.
- Verify the Scanned Document.
- Open the saved scanned file to verify that the document and your signature are clear and legible.

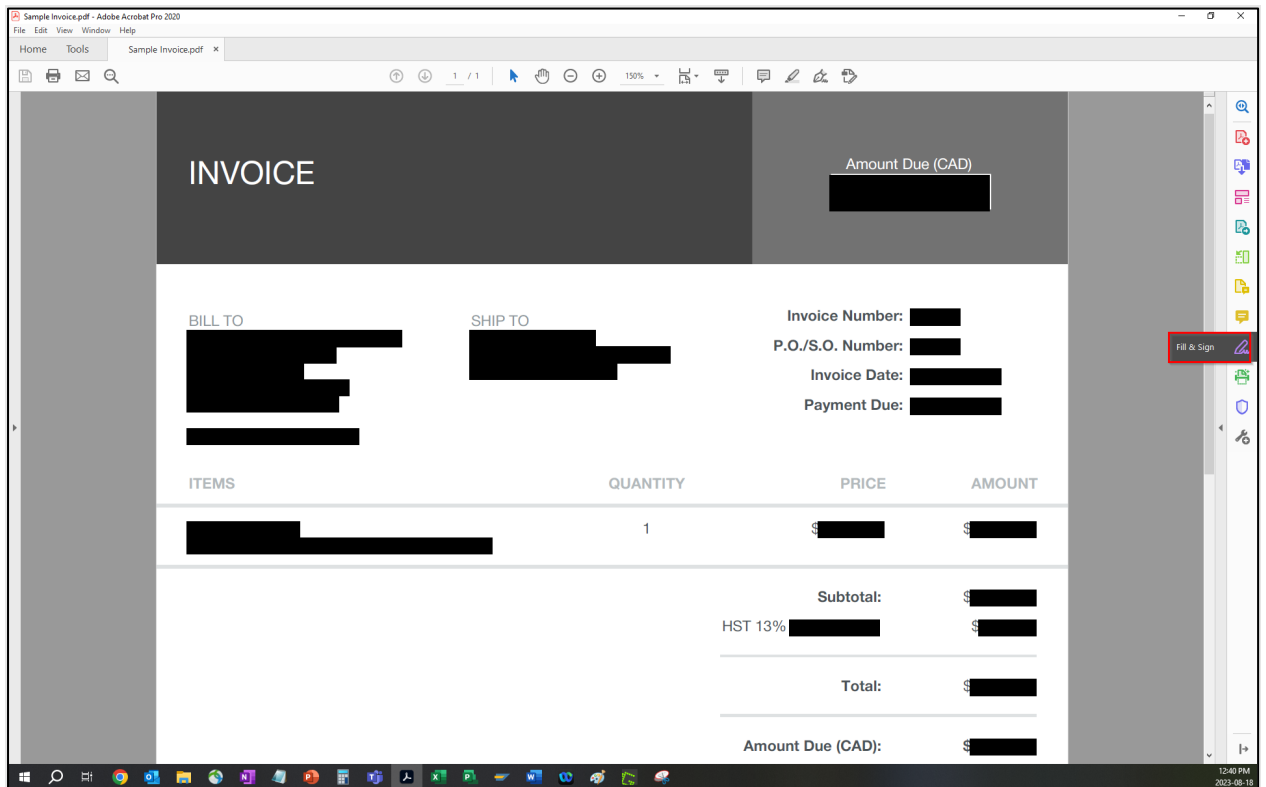
E) Sign and Fill Function in Adobe Acrobat Reader

1. Install Adobe Acrobat Reader

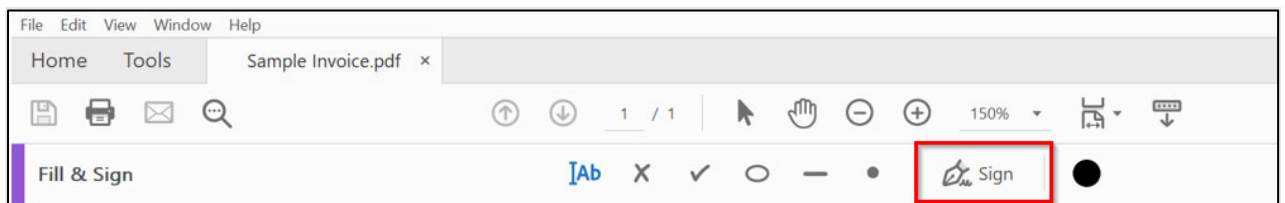
If you don't have it already, please contact your local Administrator for installation of the latest version of Adobe Acrobat Reader.

2. Open a PDF Document

- Open the PDF document you want to sign or fill out by clicking on "File" in the menu bar and selecting "Open," or by dragging the file into the Adobe Acrobat Reader window.
- In the right-hand pane, click on the "Fill & Sign" option. This will open the Sign and Fill toolbar with various options for adding text and a signature.



- The following tool bar will appear above the document.



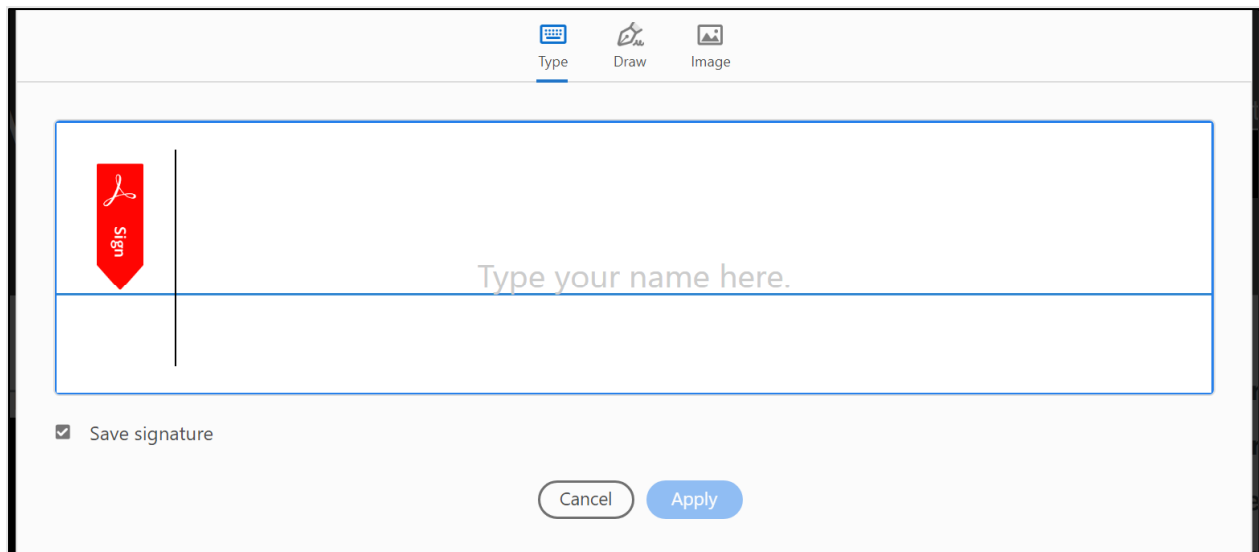
- Select 'Sign' button in the tool bar.
- If you already have a signature set up, then please go to step 4.

3. Set Up Your Signature (if you have not already done so)

- Skip this step if you already have your signature set up.
- Choose 'Add Signature.'

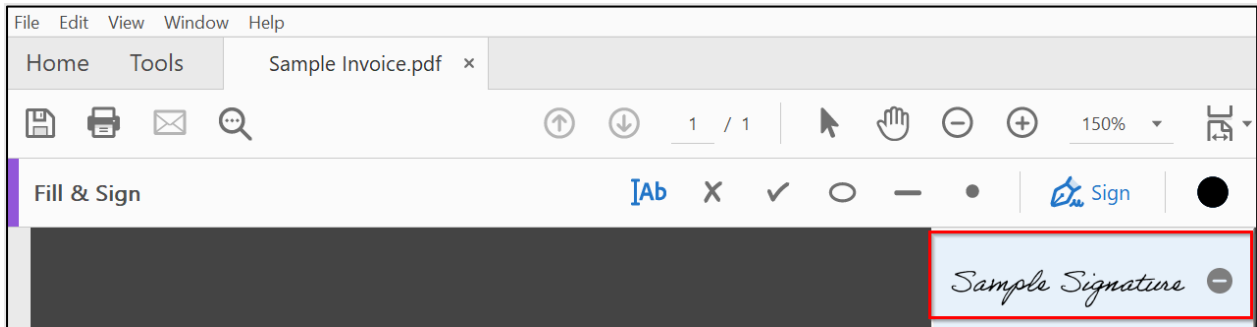


- Select the option that you want:
- Type your signature using a font that resembles handwriting.
- Draw your signature using your mouse, touchpad, or stylus.
- Insert an image of your signature saved on your computer.
- Select the signature option and follow the prompts to apply your signature on the document.
- Position and resize the signature as needed.

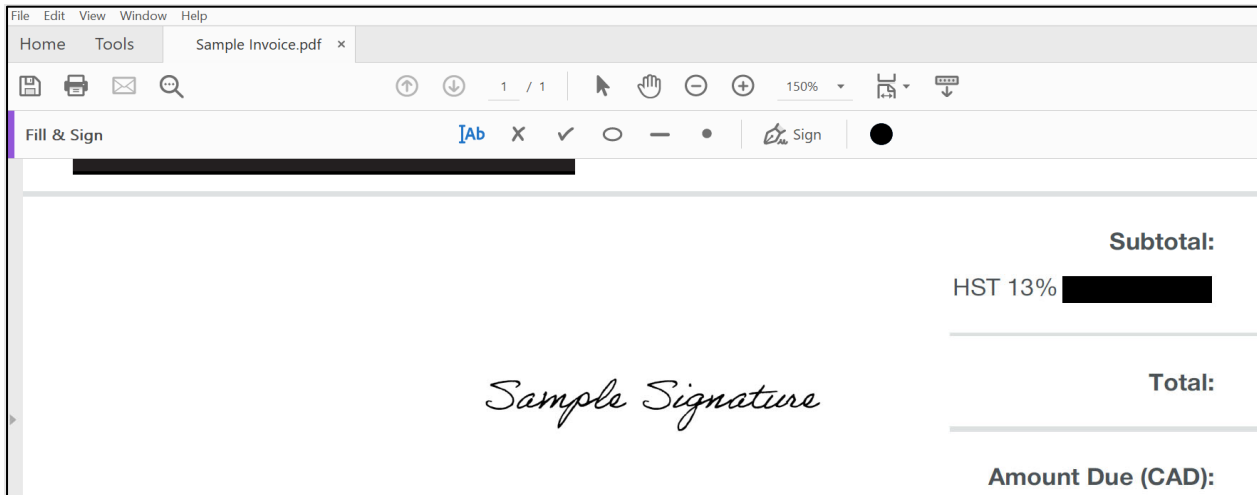


4. Sign a PDF Document

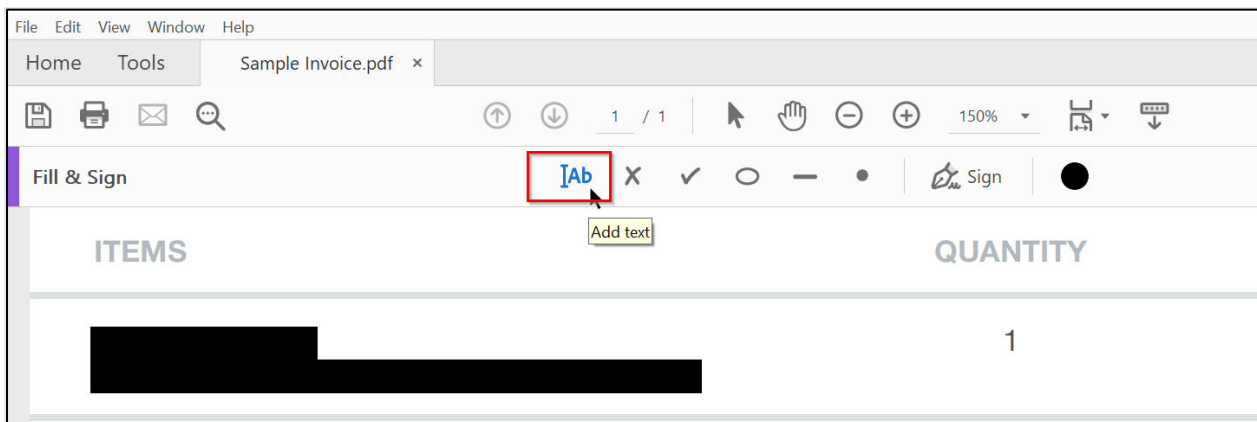
- Click on the form field you want to fill out or area you wish to sign.
- Ensure you are still in "Fill & Sign" and select "Sign".



- Place the signature where you would like it and adjust the size.



- You can also add accompanying text if needed by using the text button below.



5. Save and Finalize the Document

- Once you have completed signing and filling out the document, review it to ensure accuracy.
- Click on "File" in the menu bar and select "Save" or "Save As" to save the filled and signed document.

F) Email with signature block

Approvals provided by email with a signature block may be accepted if, the following conditions are met:

- The email is sent from a University of Toronto email address (i.e., accessed using your UTORid).
- The document(s) being approved are attached to the email (i.e., the approver should re-attach the approved document in their email to the individual processing the transaction).
- The email thread contains sufficient information to identify the document/ transaction that is being approved (for example, when approving a vendor invoice, the name of the vendor, the invoice number and the amount of the invoice being approved should be included in the email). The information may be provided anywhere in the e-mail trail (i.e., by the requester or the approver).
- The signature block of the approver must include their title and department.
- A statement indicating the intent of the signatory, such as "Approved for payment" or "Approved for posting".
- The name, current title, department of the signatory, and date of signature.
- Any other information required to process the transaction (e.g., general ledger accounts, funding source, cost allocation, and tax code) that is not already provided on the document.
- Please see examples below:

Example #1:

From: Emily Smith <Emily.Smith@utoronto.ca>

Sent: May 11, 2023 2:08 PM

To: Joe Daniels <J.Daniels@utoronto.ca>;

Joe,

The attached invoice #555 from XYZ Services Co. in the amount of \$11,300 is approved for payment.

Thanks.

Emily Smith

<<TITLE>>

<<DEPARTMENT>>

Example #2:

From: Emily Smith <Emily.Smith@utoronto.ca>

Sent: May 11, 2023 2:08 PM

To: Joe Daniels <J.Daniels@utoronto.ca>;

Approved.

Thanks.

Emily Smith

<<TITLE>>

<<DEPARTMENT>>

From: Joe Daniels <J.Daniels@utoronto.ca>;

Sent: May 11, 2023 2:08 PM

To: Emily Smith <Emily.Smith@utoronto.ca>

Emily,

Please find attached invoice #555 from XYZ Services Co. in the amount of \$11,300. Please approve this invoice for payment.

Thanks.

Joe

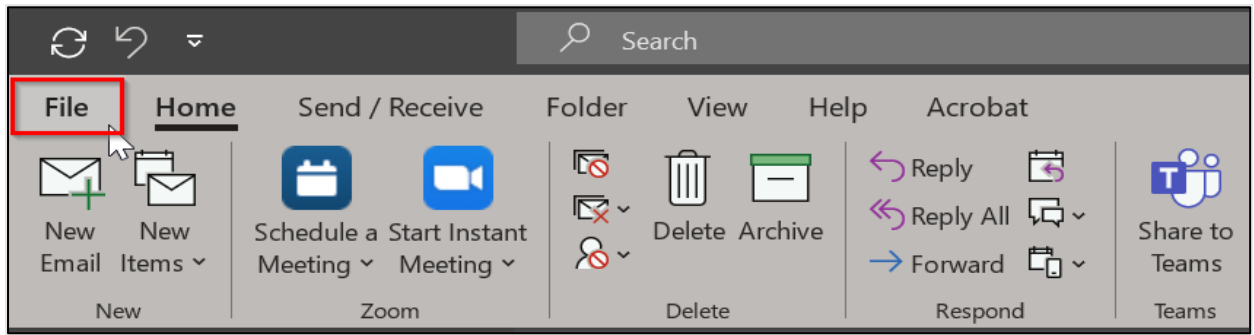
<<TITLE>>

<<DEPARTMENT>>

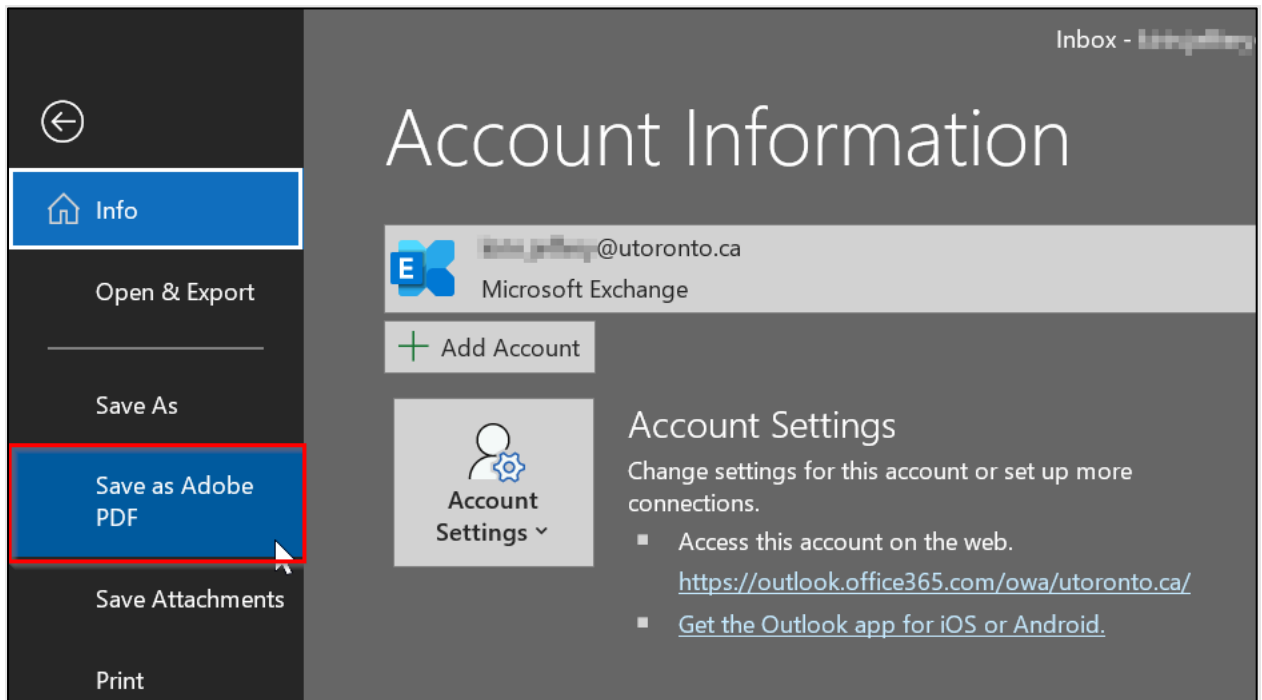
G) Save Emails to PDF

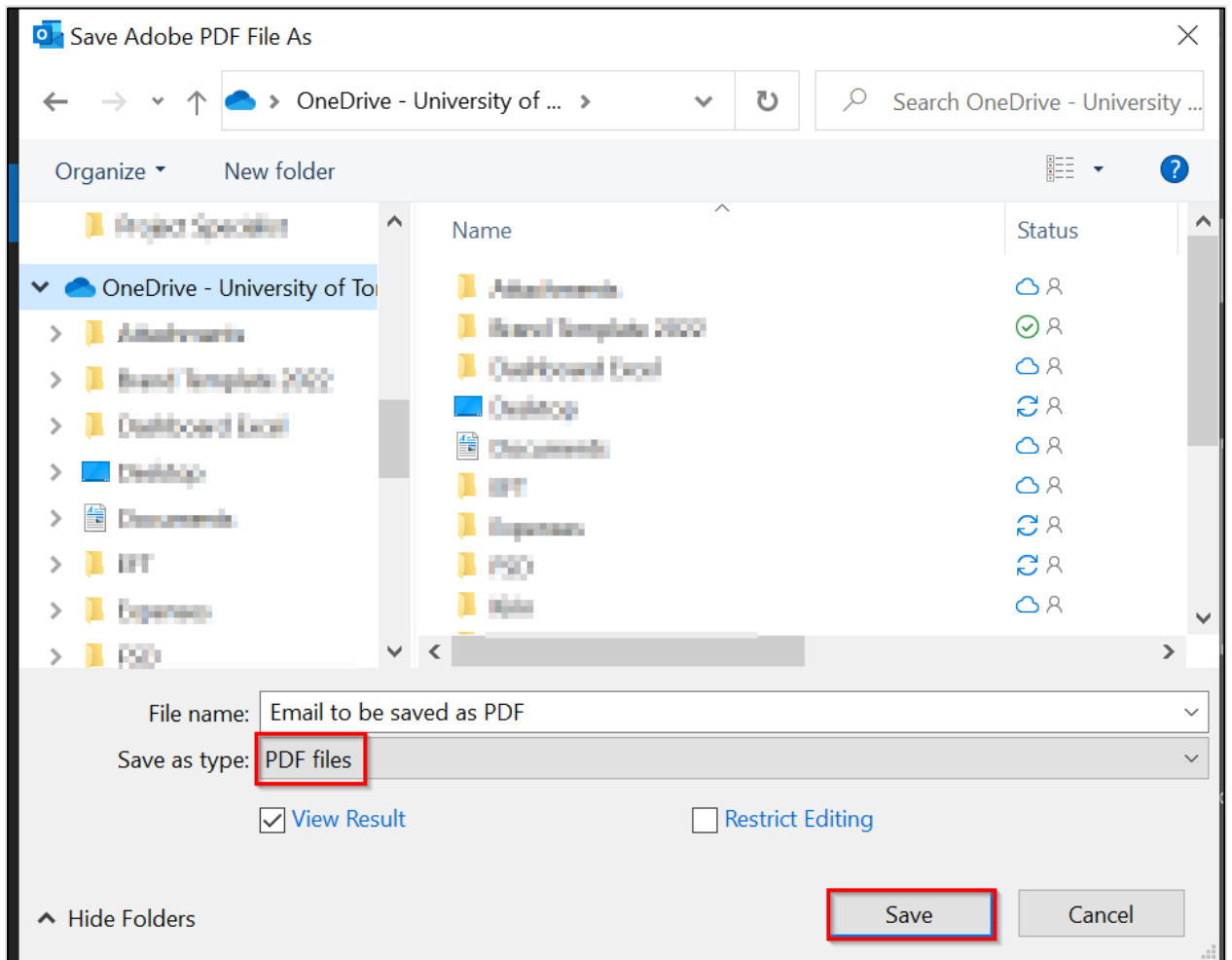
- Open Outlook and sign into your account.

- Locate the email you want to save as a PDF and open it.
- Click on the "File" tab located in the top-left corner of the Outlook window.



- From the dropdown menu, select "Save as Adobe PDF".





- Choose a location on your computer where you want to save the PDF file. Provide a suitable file name for the PDF.
- Click on the "Save" button.

Reference links:

<https://helpx.adobe.com/ca/acrobat/using/digital-ids.html>

<https://helpx.adobe.com/ca/acrobat/using/adding-stamp-pdf.html>