

# Signing documents

Mendlesham Computer Club

By Giles Godart-Brown

# How to digitally sign documents

- If you receive a document via email, it will almost certainly be a Portable Document Format (PDF) so you have a couple of options;
  - Print - fill sign with a pen - scan,
  - Save to disk - open in Adobe, use 'Fill and Sign' and save
- If you receive a trusted link (e.g. DocuSign), click and it will display the document and give you options for digital signature.

## Health Warning

Forms often arrive as Email Attachments, exercise your usual caution before saving them to your disk or opening them.

- Were you expecting it?
- Is it from an email address you recognise?
- Is it a pdf attachment or a link to somewhere you trust?

# Why Portable Document Format (PDF)?

- PDF's are used for forms because, apart from adding signatures and filing in fields the underlying document cannot be edited.
- There are two types of PDF that are used
  - A pdf form that has defined boxes which are the only things you can add to
  - A straight PDF where you can add text and signatures anywhere.

# Document Management Web sites

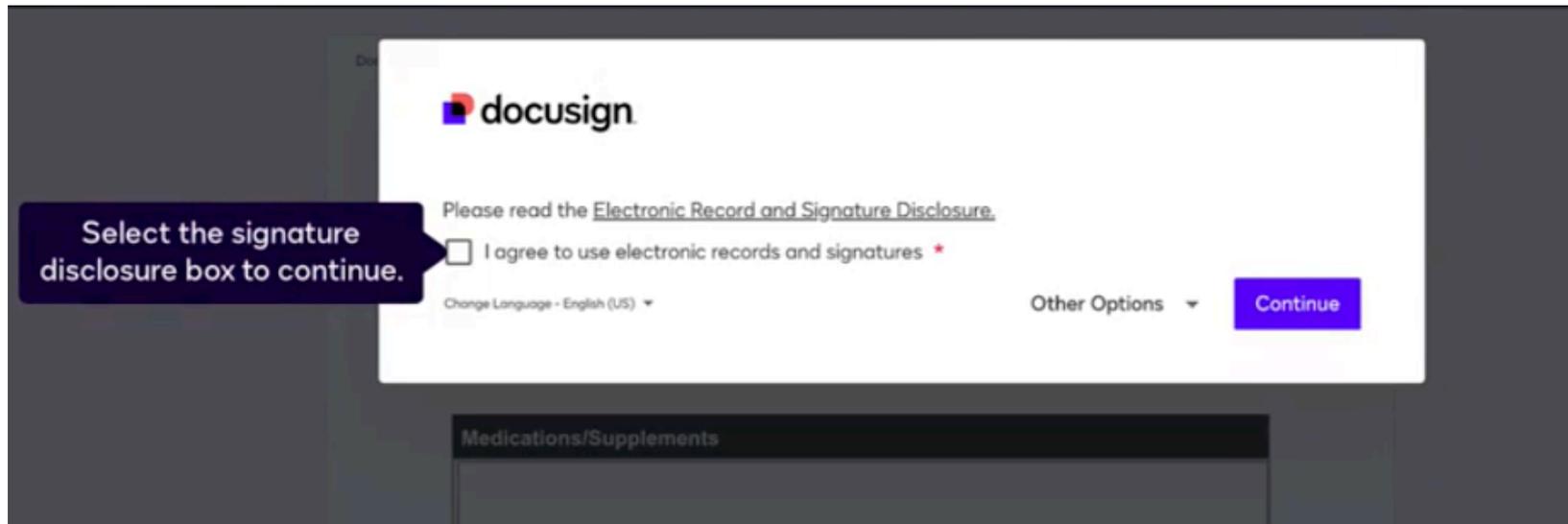
e.g. DocuSign

## DocuSign

- Increasingly companies are using DocuSign to send out documents for signature.
- This video shows how to do it

# DocuSign dialogue

It will ask you to confirm that you are happy to use an electronic signature.



# Signature files

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## Creating a signature image file.

- Write your signature on a white piece of paper with a clear pen (e.g. Sharpie)
- Take a picture of your signature with your phone.
- Crop this picture and send it to your PC to be used later.
- Save this where you can find it again e.g. a signatures folder
- You can then use this in any document.

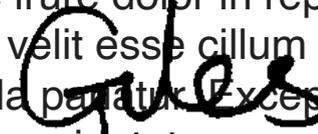
# Transparent background

- Your image will have a white background that will obscure writing behind it.
- There are internet sites that will give your signature a transparent background, but it is probably safer to email your signature file to me and I will do it for you

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# Exercise

## Create your own Signature file

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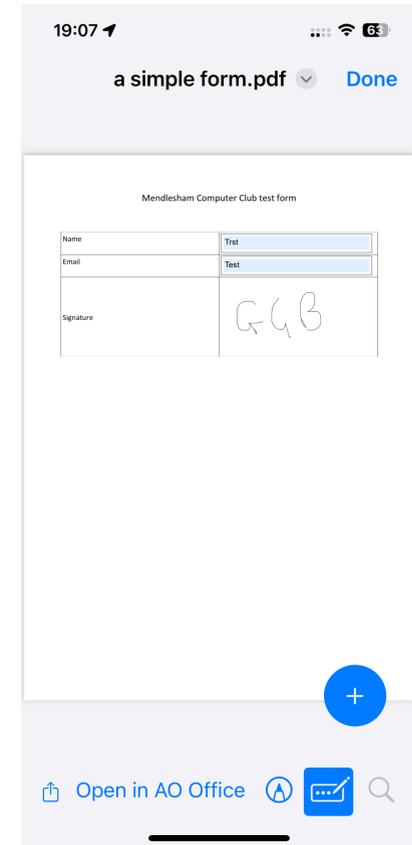
# Filling in and Signing PDFs

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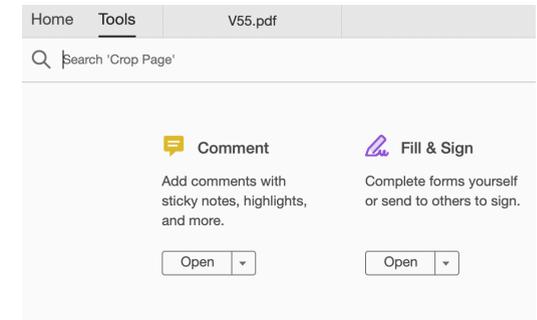
# How to fill in a form in an email on a phone or tablet

- iPad or iPhone
  - If you open a PDF form attachment on an iPhone or iPad it will open an app that allows you to edit it with your finger.
  - When you press 'done' it allows you to send it as a reply or save it to your files
- Android
  - Install the Adobe Reader app and open the attachment with this.



# How to fill in a PDF form saved to your computer's disk with Adobe Acrobat Reader 'Fill and Sign'

- Open the PDF with Acrobat Reader (you may need to change your PC default settings for this to work automatically)
- Click on Tools>Fill and Sign
- You can navigate around the document filling in the boxes.
- If you have a signature image file, you can also add this. Note if you want to change your signature file you must remove the old one first.
- When you have finished, save the document as a PDF.
- There is a simple example at [https://godartbrown.co.uk/MCC/docs/examples/pdf/a\\_simple\\_form.pdf](https://godartbrown.co.uk/MCC/docs/examples/pdf/a_simple_form.pdf)



# Creating a PDF

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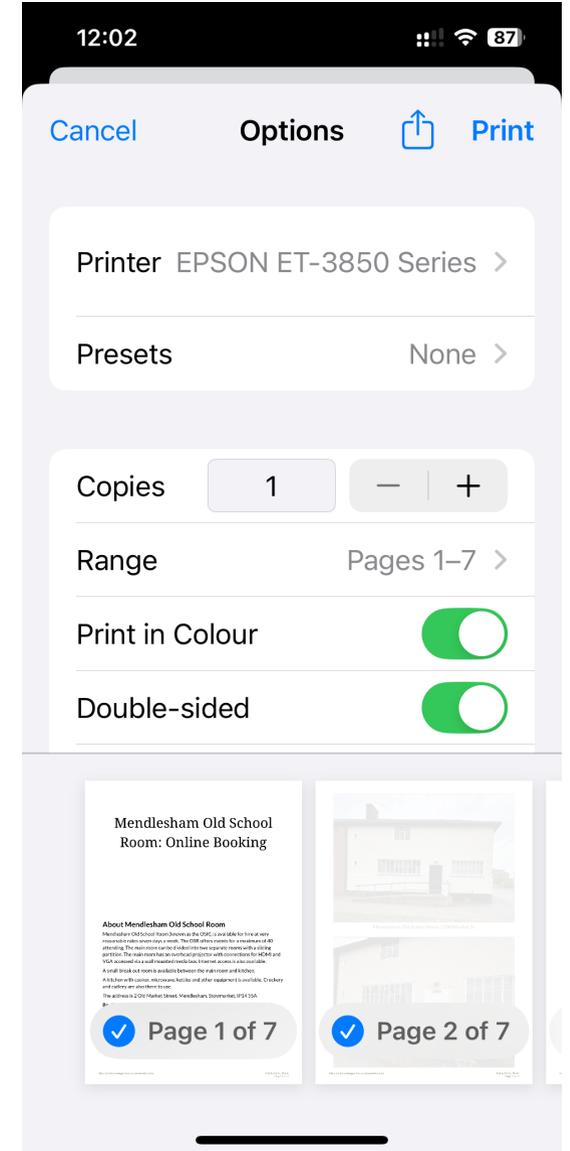
## How to create a PDF on a PC

- There are several options;
- Print the document but instead of selecting a printer, select print to PDF. This works pretty much everywhere, but can create very large documents.
- Most applications have a 'Save as PDF' or 'Export as PDF'. These produce smaller PDFs and can be used (depending on the Application) to create PDF forms.

# How to create a PDF on an iPhone or iPad

This works on anything that you can share.

- Press the share icon on the item you want to convert (web page, document etc.) 
- Scroll down and select print. At the bottom it shows a preview of the document
- ‘pinch out’ on the document display and it will create a PDF of the document which you can use the share button again to email etc.



# How to create a PDF form on a computer

- MS Word
  - There is no direct way of creating a PDF Form in Microsoft Office, you need to edit a straight PDF and add the boxes either in Adobe Acrobat or the Foxit PDF Editor.
- Open Office
  - Create a Text document in the usual way
  - Create a table to hold your prompts and boxed
  - Go to View>Toolbars and make sure Form controls is checked
  - Select the Text field icon in Form Controls, then create a box on the document where you want the field.
  - If you double click in the new box there are additional parameters (like a name)
  - Save with File>Export to PDF

