Tips for Signing Forms Remotely

Office of Graduate Studies & Research

General Information

- The OGSR is accepting forms sent via W&M email to dean-gsr@wm.edu and will accept signatures added to these forms through a variety of digital means.

- These slides are meant to help introduce some of the common ways you might add your signature to forms such as those signed at the end of a successful thesis or dissertation defense, including the Dissertation Approval Page and the Defense Examination Form. We hope these tips make this process easier for all involved!

N.B. – Because of variations in PDF viewers and differences between Mac and PC platforms, please note that you may find some of these tips don't work for you. You may need to experiment. See page 7 for extra help.

Contents

Print, Sign, and Scan

- One way to obtain a signature on a form being submitted via email, is to print the form, sign it by hand, then scan it (or take a photo using a phone) and email it as a PDF to the intended recipient.
- However, if multiple people need to sign the same form, the quality of the image degrades with each additional signature. This sometimes makes the form unreadable by the time it has made the rounds through an entire committee.
- **For forms that require multiple signatures, try using the other methods described below on pages 3-6.**

The Approval Page

This form is signed by all committee members at the successful conclusion of a dissertation or thesis defense. The formatting of the filled-out Approval Page must be reviewed by the OGSR prior to the defense. Following the defense and after signatures have been obtained, it must be inserted into the final version of the dissertation or thesis prior to being submitted.

- The Approval Page template is available as either a Word document or a PDF. Students must fill out the template and gain approval on its content from the OGSR for prior to the defense.
- Templates: https://www.wm.edu/as/graduate/studentresources/thesis-dissertations/physicalstandards/index.php
- **The easiest way to obtain signatures on the Approval Page following the defense is to circulate the Word version by email--one committee member at a time--asking each to cut and paste into the document a .jpg image of their signature.** This is similar to adding an image of one's signature to a letter of recommendation.
- As each person adds their signature to the document, they need to save the file and then email it to the next committee member on the list.

Signing PDF forms using Adobe Acrobat Reader (free)

Steps:
- First, be sure to download the PDF form to your computer. Do not simply open the form in a web browser.
- Open the form in Adobe Acrobat. Acrobat is free and available online to download. It is compatible with both Mac and PC.

- Select the Tool called "Fill & Sign." (See red arrow at right).

Tip: if the right hand column shown here doesn't appear on your screen, you can select the "Fill & Sign" tool from the "Tools" dropdown menu.
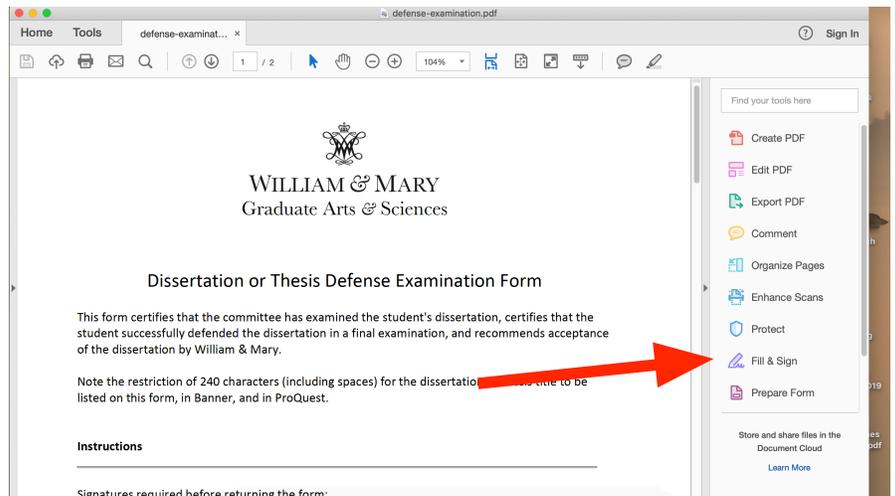
- Click "Sign" (see red arrow at right)
- This will give you the option to "Add Signature." Click that option. (see inset at right)
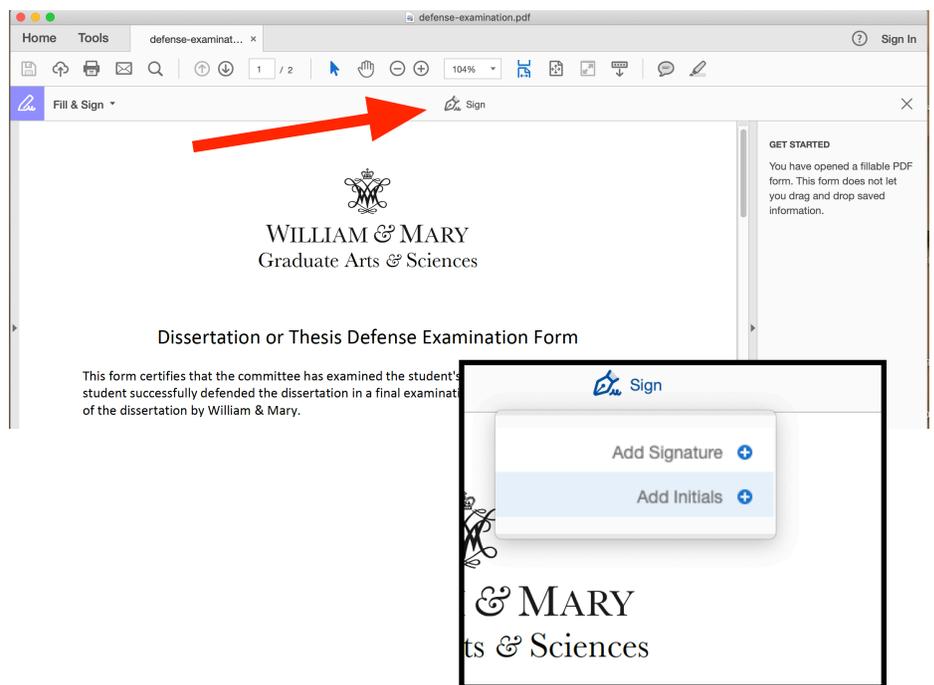
- Once you have clicked "Add Signature," the screen shown at the right will appear.
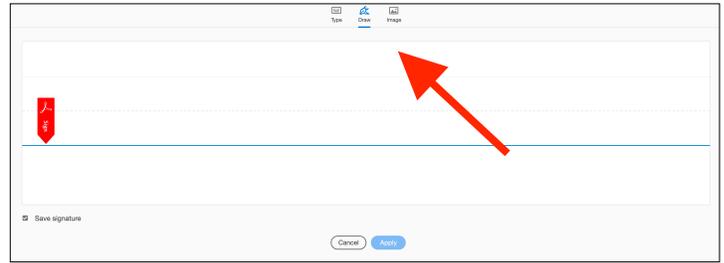
- **You then have two options.** You can either upload an "Image" of your signature (a .jpg or .png image of your signature used for signing letters), or you can "Draw" a signature using a trackpad or touchscreen.
  - **To upload an Image**: Click "Image" and follow the prompts. Once uploaded, click "Apply." Your signature will then appear to float in the PDF form. You will need to drag it to the appropriate location. Click to disengage the drag feature.
  - **To "Draw"**: Click "Draw" and use your finger on your trackpad or touchscreen to draw your signature. (Tip: You can click "Clear" to start again.) Click "Apply" when done. Your signature will then appear to float in the PDF form. You will need to drag it to the appropriate location. Click to disengage the drag feature.
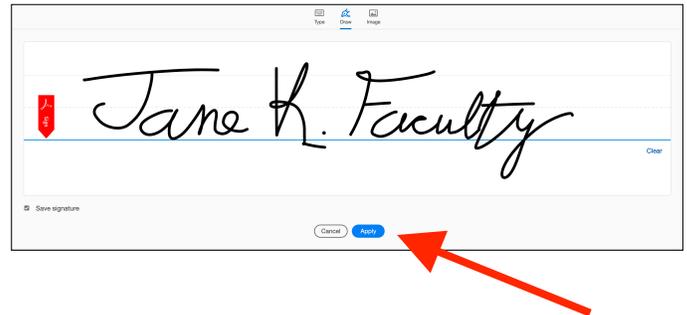
- To ensure the signature remains in place on the the form after you close the document, **be sure to save the PDF**!

Comments:

COMMITTEE MEMBERS Print Name	SIGNATURES
	Jane R. Faculty
Committee Chair or Co-chair	
Committee Co-chair (if applicable)	

- Once you're certain your signature is in place, and after saving the file, email the document to the next member in the committee so they can add their signature.

Signing PDF forms using Preview (PDF reader) on a Mac

Steps:
- First, be sure to download the PDF form to your computer. Do not simply open the form in a web browser.
- Open the PDF form using Preview on your Mac computer.

- From the toolbar at the top, select the "Tools" dropdown menu. Next select "Annotate" and then select "Signature." (see example, right)

- Finally, select the option to "Manage Signatures…" (see red arrow at right)
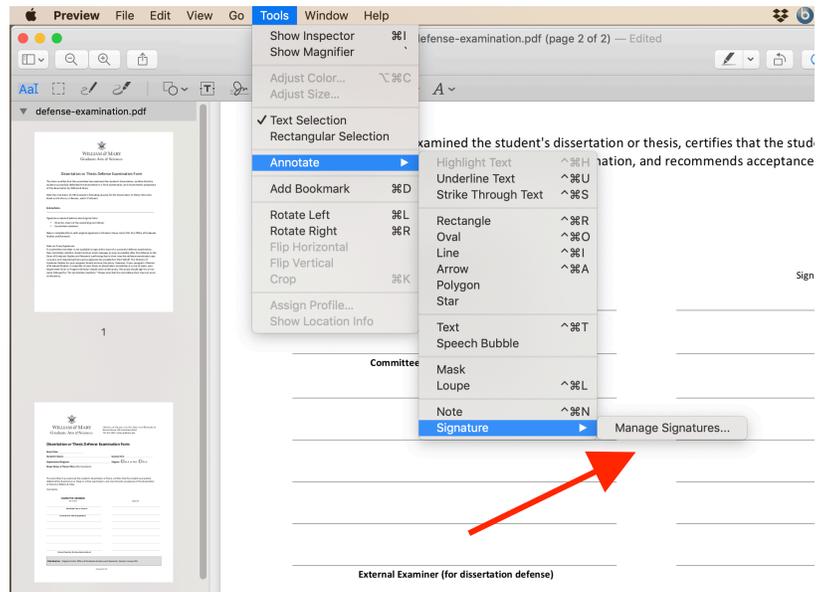
- This will generate a pop-up box (right) that allows you to either use a laptop trackpad to generate a signature (like we do at a grocery checkout), or to generate a photo of your signature to save in Preview. The photo option will allow a more accurate depiction of your signature, and is the preferred option.

- To use the preferred photo option, select "Camera." Preview will use your built-in camera. You will need to sign a piece of paper and hold the paper up to the camera for Preview to capture the signature and embed it. This can take a little bit of awkward maneuvering.
- In the screenshot at right you can see that the blank paper with original signature is being held up and that Preview has captured the signature.
- **Tip**: you'll need to line up the signature on the paper with the **blue line**. If you don't get it right at first, just click "Clear" until you get one that's clean.
- When you've captured the signature, click "Done" and Preview will save the signature for future use.
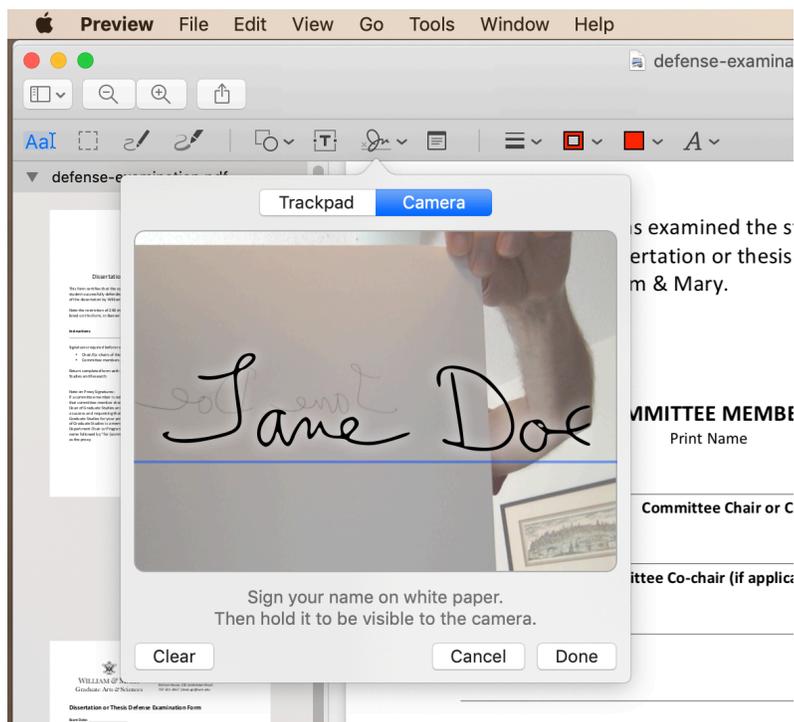
- To insert the signature you've just created in Preview into the actual form, click on signature itself. It will have automatically shown up as shown at right.
- Once you click on the signature it will generate a small text box containing the signature that will appear somewhere on the form (see inset at right). You will need to select the box with your mouse and drag it to the appropriate location. Once it is in place, click somewhere outside of the signature box to disengage the drag function.
- **Be sure to save the PDF once you're done.** Once you're certain your signature is in place, and after saving the file, email the document to the next member in the committee so they can add their signature.
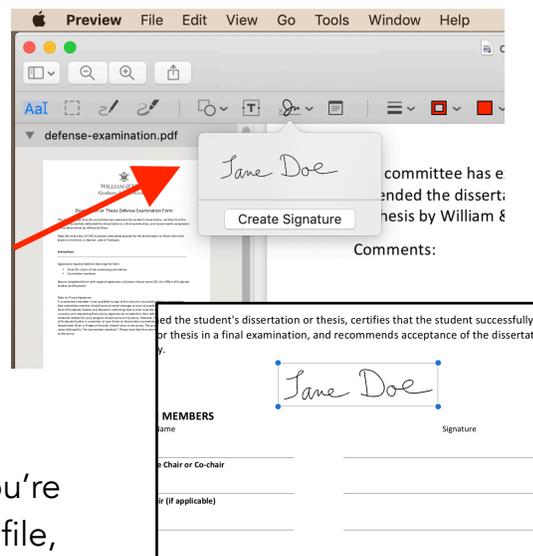
How to create a usable image file (.jpg) of your signature for use on some PDFs and all Word documents.

- It is helpful to keep a version of your signature in an image format (such as a .jpg, .tiff, or .png file), which you can easily cut & paste into any Word document and into some PDFs. If you don't already have such a thing saved on your computer, Microsoft offers some tips on how to create one: https://support.office.com/en-us/article/Insert-a-signature-F3B3F74C-2355-4D53-BE89-AE9C50022730

Other Tips

- **Sometimes after saving the PDF with edits to the form's fillable fields or after adding a signature, you may find your changes don't appear in the document when you or others reopen it.**
    - There may be a couple reasons for this type of error. First, make sure that you're editing the PDF in a PDF viewer and not in a web browser. Be sure you have downloaded and saved the document to your computer before trying to fill in the form or add a signature.
    - Another way to make sure that any edits you make to a PDF remain in the document after saving is to use the Export function in place of "Save":
        - To "Export" a PDF instead of using "Save" or "Save as," click "File" in the top toolbar and select "Export" or "Export as" and choose to export the PDF as a PDF. This sounds redundant, but it's a way of saving the document as a new file that can help ensure that the edits you made actually stick and are visible to other people. This will work in either Adobe or Preview.