Applying Electronic Signatures

FOIP and Information Management, Enterprise Information Management

Version: 2.0

Approved by: Maureen Towle, Executive Director	Owner: Enterprise Information Management
Approval date: 19 March 2020	Review date: 02 April 2022
Contact: SA.InformationManagement@gov.ab.ca	Policy Instrument type: Guideline

Contents

> **NOTE:** This guidance is for internal government use only, as it relies on identity validation methods that the Government of Alberta currently has in place within the organization. Obligations for signatures external to the Government of Alberta (e.g., vendor contracts) must continue to adhere to all established regulatory requirements (e.g., the *Electronic Transactions Act*).

Requirements

- Government of Alberta computer.
    - The computer must have the following software installed:
        - Windows operating system;
        - Microsoft Office (for signing documents in Excel and Word); and/or
        - Adobe Acrobat Reader DC (for signing documents in .PDF).
- Government of Alberta certificate (for the use of electronic signatures) showing your name, email address, and date, and issued by Government of Alberta Issuing CA # (please note that the number after the CA can vary). Refer to **Appendix 1 – Checking Certificate** for more information.
    - There are multiple Government of Alberta Issuing CAs (Certificate Authorities), so the number at the end may vary.
    - You will be able to view your certificates when following the signing procedures in this document. If your signature does not appear to match what has been outlined above, refer to **Appendix 2 – Creating a Certified Government of Alberta Electronic Signature**.

Word and Excel Documents

Adding Signature Lines

Add *ALL* signature lines before you sign the document. Once signed, any changes to the document will remove all previous signatures (this includes adding further signature lines).
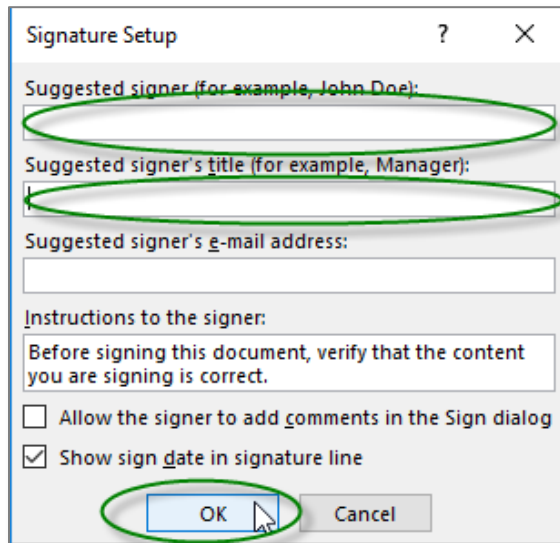
1. Open your Word or Excel Document.
2. Go to the location in the document where you want to place signature line(s).
3. From the (Word/Excel) Ribbon (shown below), select the **Insert** tab.
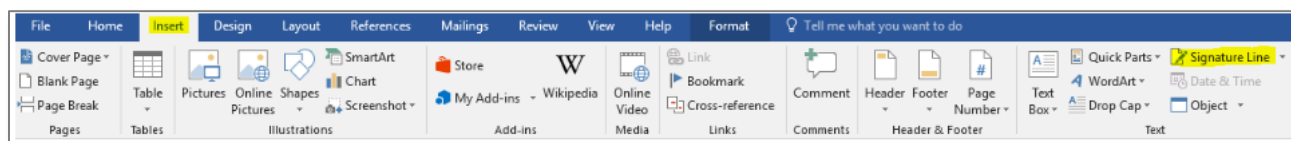
4. Click **Signature Line** from the **Text** group.

---

5. In the **Signature Setup** pop-up, enter the information required into the fields and click **OK.**
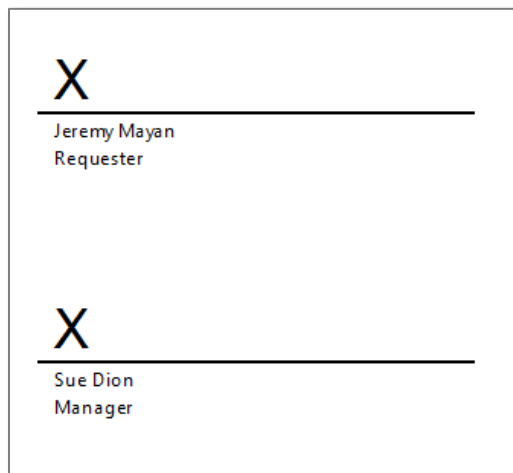
6. Repeat Steps 3-5 to add additional signature lines, if required.

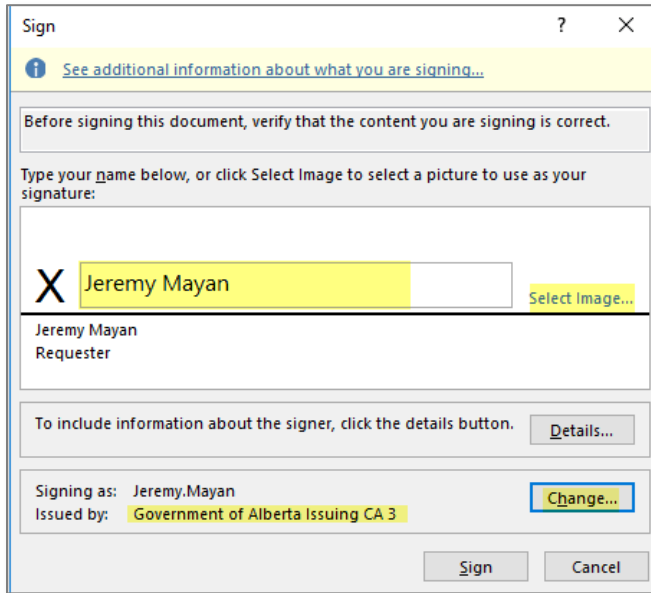The signature lines will appear similar to the image below:

Signing

To sign a Word or Excel document with signature lines:
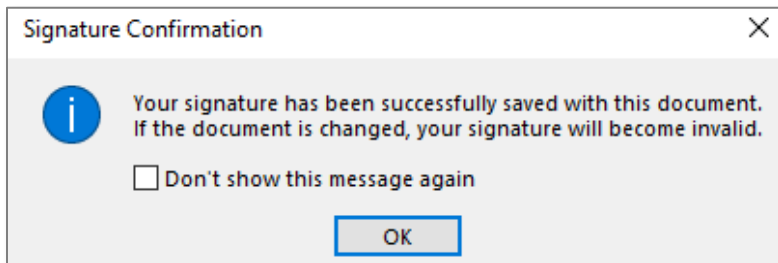
1. Open the document.
2. Find and double-click the signature line you need to sign.

3. A **Sign** pop-up box will appear. Type your name beside the **X**, or **Select Image** of your signature, if you have a saved image of your signature on your computer.

4. Verify that the selected certificate has your name and is **Issued by** *Government of Alberta Issuing CA #*.
   - If the default certificate does not match this, click on the **Change…** button and select the correct certificate.
5. Click **Sign**.
6. The **Signature Confirmation** box will confirm that your document has been saved with your signature.

NOTE: Signing automatically saves the document; you do not need to save again.

# .PDF
Requirements
- Adobe Acrobat Reader DC.

Adding Signature Fields
If you are the first person that needs to sign a document, you must add *ALL* the required signature lines before you can sign the document.
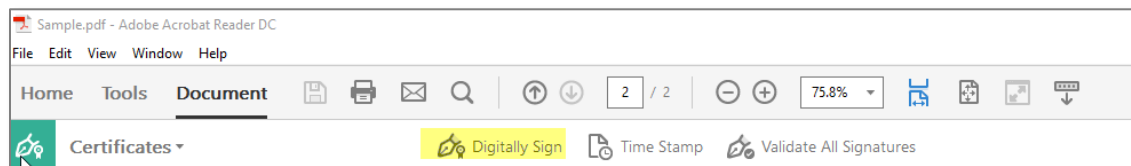
APPLYING ELECTRONIC SIGNATURES

To Add Electronic Signatures to a .PDF file:

1. Open the document with Acrobat Reader DC.
2. Go to the location in the document where you require electronic signatures.
3. On the Acrobat Reader toolbar, click **Tools** and then **Certificates**.
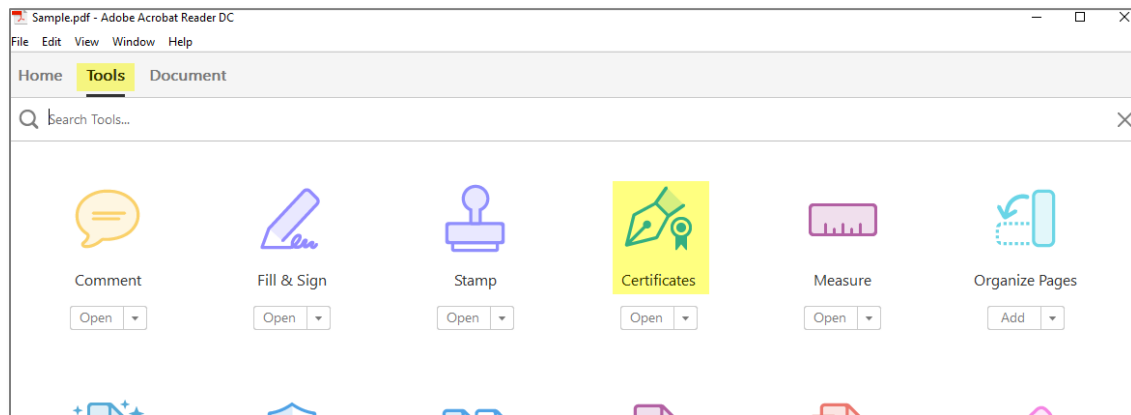
4. From the Certificates bar, click **Digitally Sign**.

5. Click **OK** if there is a pop-up, (ignore this step if you do not see a pop-up).
6. Draw a rectangle over the area you want to place the signature.
7. Choose a Digital ID and click **Continue**.
8. Click **Sign**.
9. Click **Save** and **Yes** to replace the original .PDF.
10. Right-click on your signature (just added) and select **Clear Signature**.
11. Repeat Steps 3-9 to create all required signature fields for the document (if required).
12. Click **File** and then **Save**.

The document will now have signature fields and is ready for signatures.

Signing
To sign a .PDF document with signature fields:

1. Open the document with Adobe Reader DC.
2. Go to the location in the document where you are required to sign.
3. Double-click the required signature field.

4. A **Sign Document** pop-up box will appear. If not selected by default, select the certificate with your credentials that is **Issued by** *Government of Alberta Issuing CA #* using the **Sign As** drop-down.
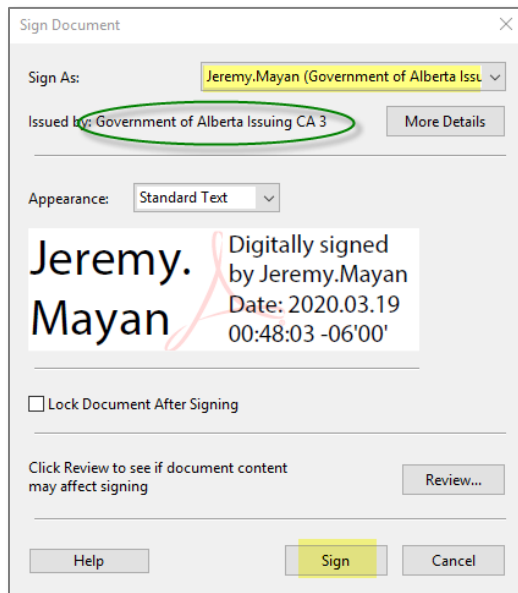
5. Click **Sign**.
6. Click **Save** and **Yes** to replace the file with your signed copy.

NOTE: There is no method for users to sign the .PDF securely on a mobile device. The individual who is signing the document must be on a Government of Alberta desktop or laptop that is connected to the Government of Alberta network.

NOTE: A certified Government of Alberta signature is different from an electronic signature that you create through the Adobe program; whenever a user is added to the Government of Alberta network, they are automatically assigned a certified signature that can be traced directly to the government. Also unlike standard Adobe signatures, a Government of Alberta user is only granted one unique signature with the user's name.

SharePoint

A Microsoft browser (either Internet Explorer or Microsoft Edge) is the preferred browser for accessing SharePoint. The directions here assume that you are using Internet Explorer.

Other browsers require you to upload the file to SharePoint yourself once signed.

To Sign a Word document with signature lines from SharePoint:

1. Using your browser navigate to the appropriate SharePoint location.

2. Click on the drop-down to the right of the file in SharePoint and select **Edit in Microsoft Word** (for Word documents), **Edit in Microsoft Excel** (for Excel documents) or **Edit Document** (for .PDF documents).
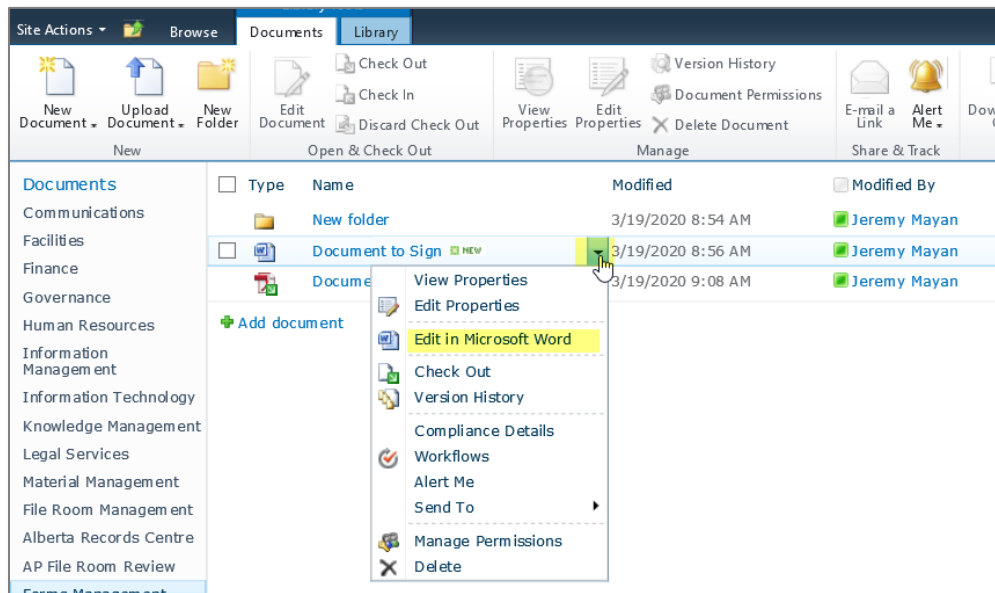
3. Follow the Word and Excel Signing or the .PDF Signing steps above.

NOTE: When signing a Word or Excel document from SharePoint, once signed and the **Signature Confirmation** box has been closed, you can close the document. There is no need to save the document further.

NOTE: When editing a .PDF document from SharePoint you will need to **Check In** the file when you are complete so that others can update the document. Do this by clicking **File**, then **SharePoint/Office 365 Server**, then **Check In**. Click **OK** on the **Check In** pop-up.
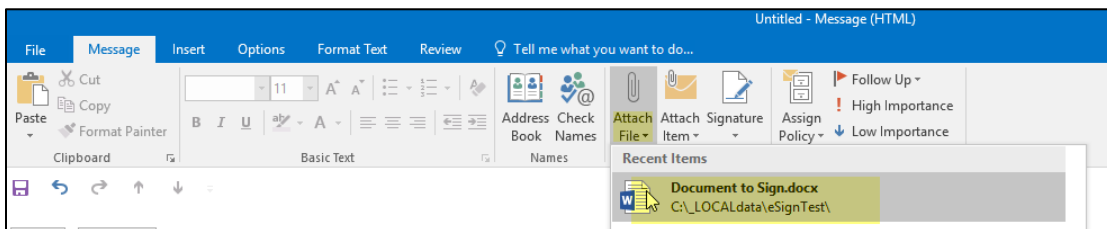
Email Attachment (Word and Excel)

To sign a Word document with signature lines from an email attachment:

1. From the email, save the attachment to your local computer. In Outlook, do this from the **Attachments** drop-down (image below).

NOTE: Do not open directly and then save, as this will remove the signatures already applied to the document.
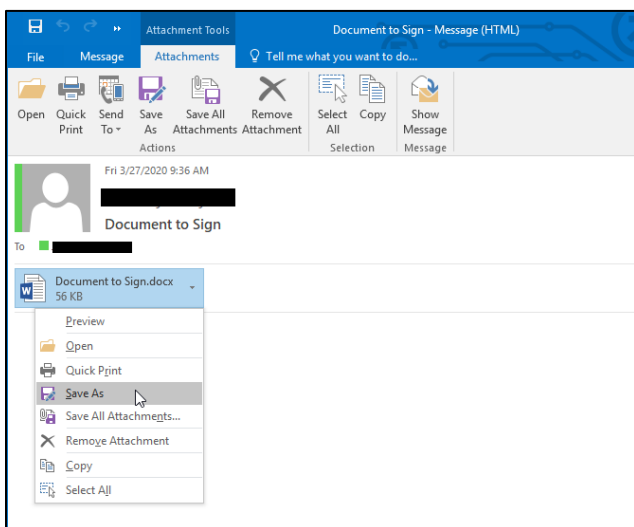
2. Once signed, close the word document. Do not take action to save the document, especially **Save As**, as this will remove the signature.
3. Open Outlook, and create a new email, attach the file to the email using the **Attach File** option in the **Message** tab.

4. Send email to next signatory.

To store email attachments to a storage location use the **Attachment** drop-down as described in Step 1, and save directly to storage location from the email. Opening the document and using **Save As** from Word/Excel or copying the file will invalidate the signatures.

Contacts

For assistance or reporting issues with the procedures in this document, please contact:
Email: sue.dion@gov.ab.ca
Phone: 780-427-4502

For assistance with certificates, please contact:
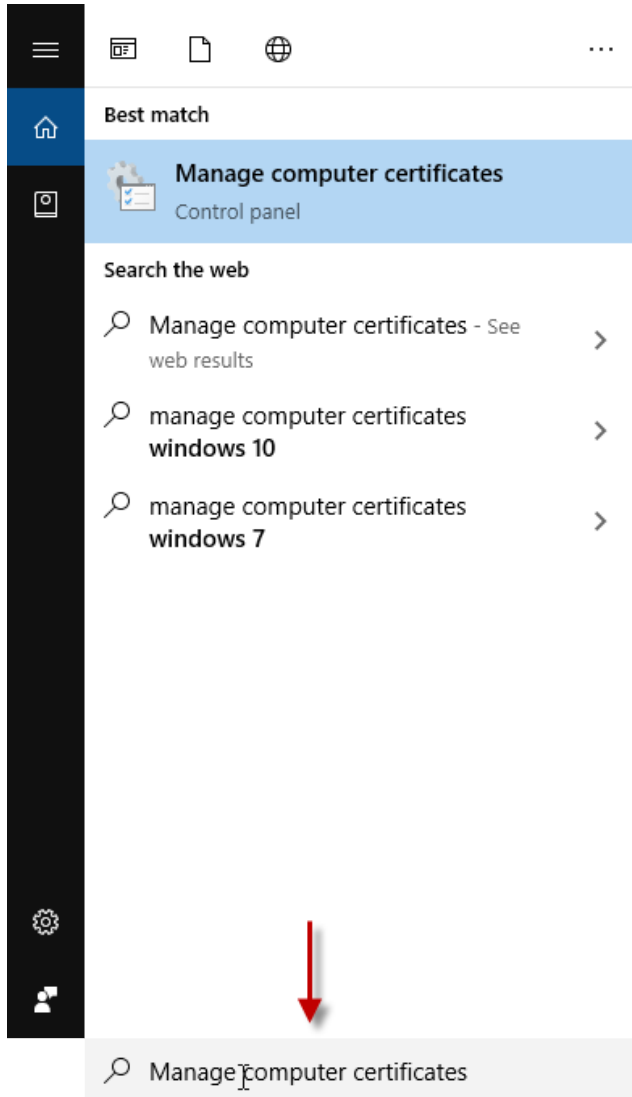Email: goa.servicedesk@gov.ab.ca
Phone: 780-427-1462

Appendix 1 – Checking Certificate

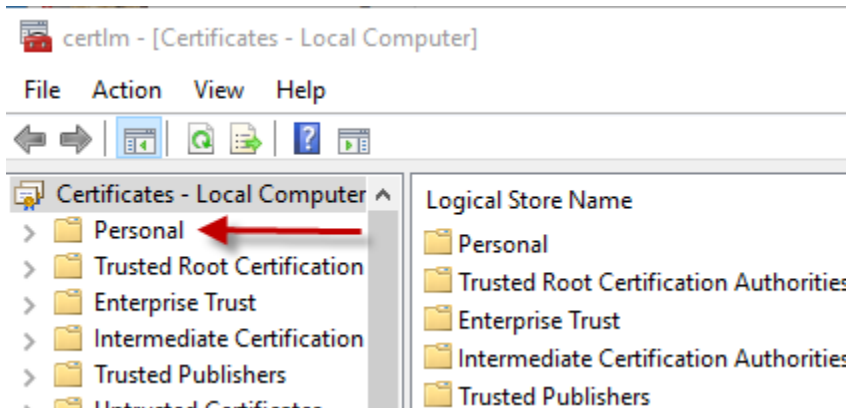1. Click on your Windows key (found at the bottom left of your task bar).

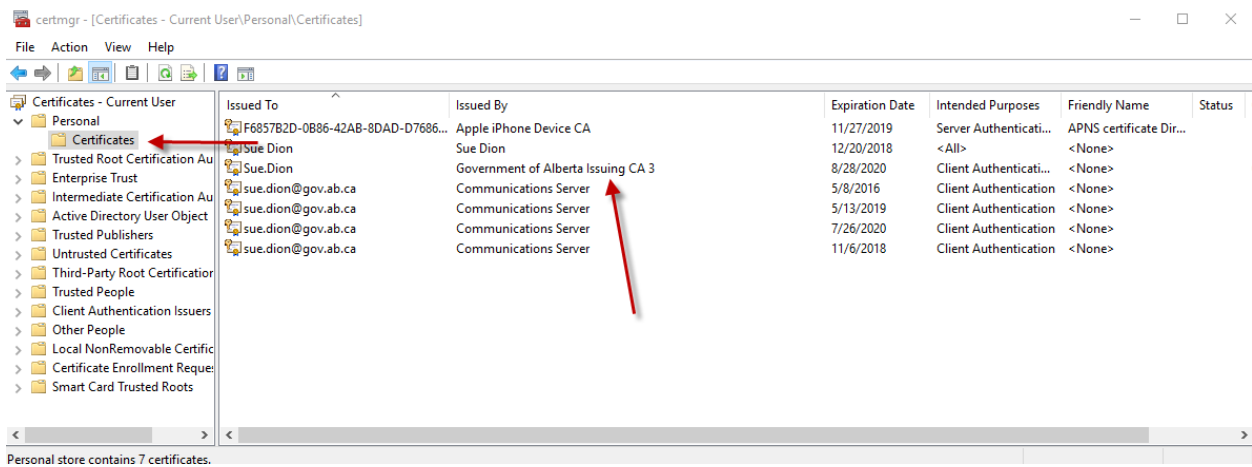2. In the **Type here to search**, type "Manage computer certificates".

3. The following window will open – Click on the **Personal** folder.

4. The following window will appear.

5. Click on **Certificates** folder and you will see all your certificates.
6. The certificate that you will use will be the **Government of Alberta Issuing CA #** certificate.

IF YOU DO NOT HAVE A "GOVERNMENT OF ALBERTA ISSUING CA #" CERTIFICATE, go to **Appendix 2 – Creating a Certified Government of Alberta Electronic Signature** to set one up.

Appendix 2 – Creating a Certified Government of Alberta Electronic Signature

Solution

How to create a Government of Alberta document-signing certificate. The certificate is stored in your Windows profile, and will be available from any Government of Alberta desktop or Citrix session for electronically signing .PDF, Word, or other Office document forms that accept electronic signatures.

NOTE: There is no method for users to sign the .PDF securely on a mobile device. The individual who is signing the document must be on a Government of Alberta desktop or laptop that is connected to the Government of Alberta network.

NOTE: A certified Government of Alberta signature is different from an electronic signature that you create through the Adobe program; whenever a user is added to the Government of Alberta network, they are automatically assigned a certified signature that can be traced directly to the government. Also unlike standard Adobe signatures, a Government of Alberta user is only granted one unique signature, with the user's name.
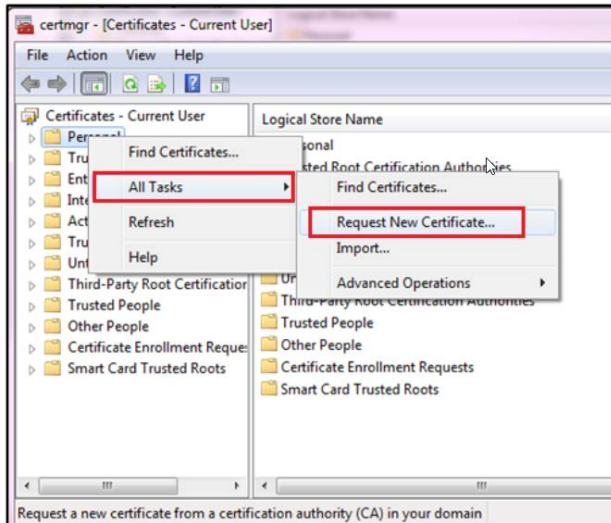
Details

1. Press the **Start** button.
2. Enter **certmgr.msc** into the Search Bar, and press **Enter**.
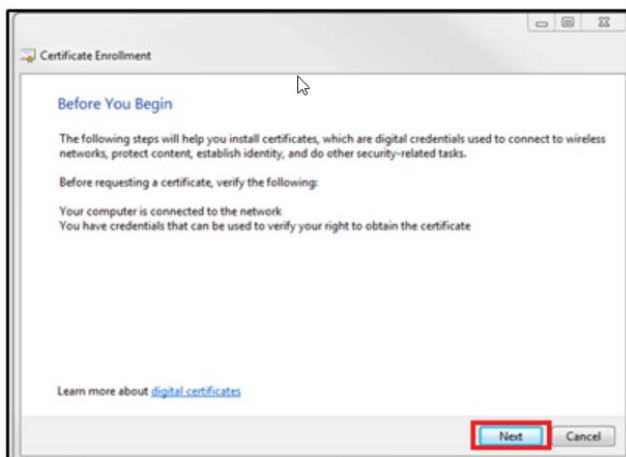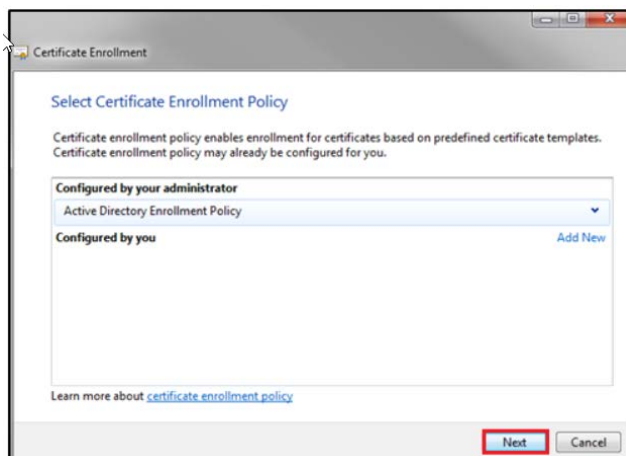3. Right-click **Personal** folder (left hand column).

---
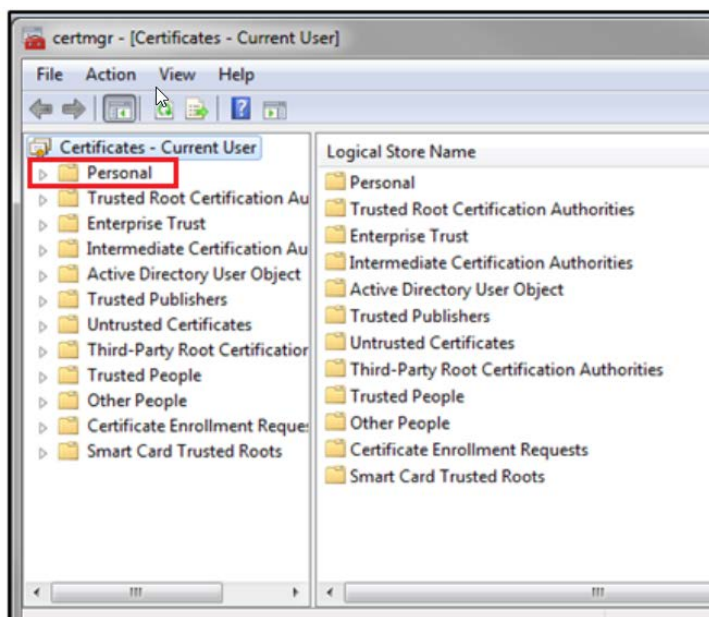
4. Click **All Tasks**, then click **Request New Certificate**.

5. Click **Next**.
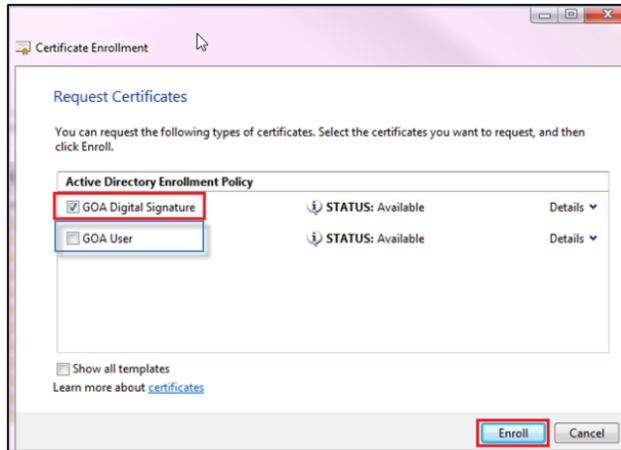

6. Click **Next**.
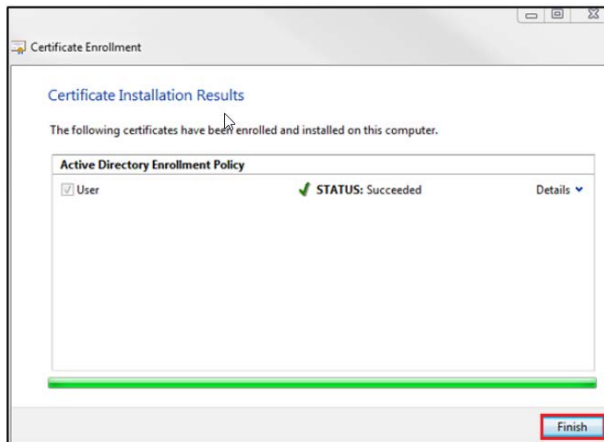
7. Click box for **GOA Digital Signature**, then click **Enroll**. If **GOA Digital Signature** is not available choose **GOA User**, then click **Enroll**. If **GOA User** is used, you may need to follow the procedure in Appendix 3 – Adding Trust to Government of Alberta Issuing CA.
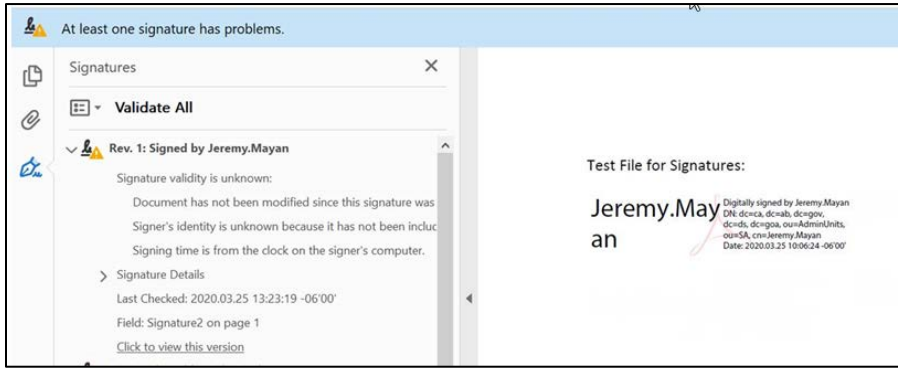

8. Click **Finish**.

9. The new certified signature is now available when signing documents in Adobe or Office products.

Appendix 3 – Adding Trust for Government of Alberta Issuing CA

When a .PDF document contains a signature Acrobat Reader DC will show the message **At least one signature has problems**.


1. Right-click on signature field with an UNKNOWN signature.
2. Click **Show Signature Properties**.
3. From **Signature Properties** pop-up click on **Show Signer's Certificate**.
4. From **Certificate Viewer** pop-up:
   - If not already selected, check **Show all certification paths found**.
   - Find the certificate that is indicating a warning.
   - Select the certificate 2 below it in the chain (it should read as Government of Alberta issuing CA #).
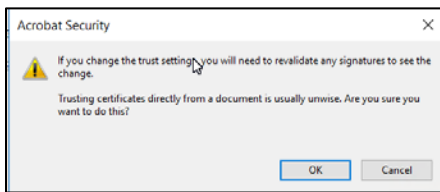   - Open the **Trust** tab for this certificate.
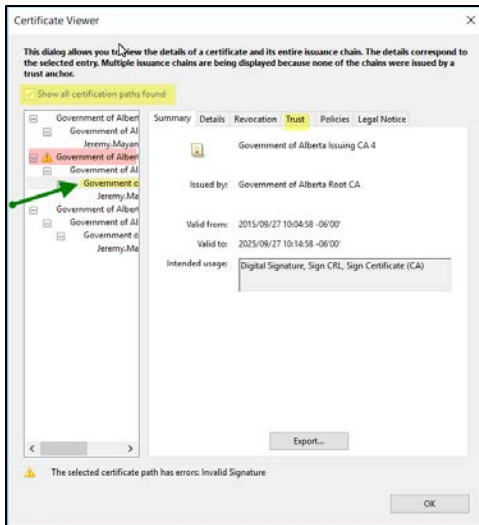
5. If the certificate does not indicate that it is trusted for **Sign documents and data** and **Certify documents**, click **Add to Trusted Certificates**.
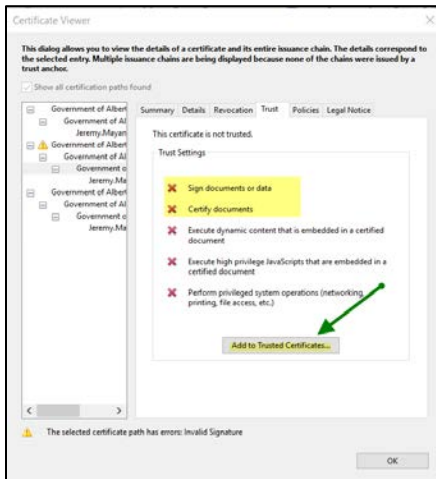
6. Click **OK** in the **Acrobat Security** pop-up.

7. In the **Import Contact Settings** pop-up, ensure the following are all checked:
   - **Use this certificate as a trusted root**
   - **Certify documents**
     - o **Dynamic content**
     - o **Embedded high privilege JavaScript**
     - o **Privileged system operations (networking, printing, file access, etc.)**
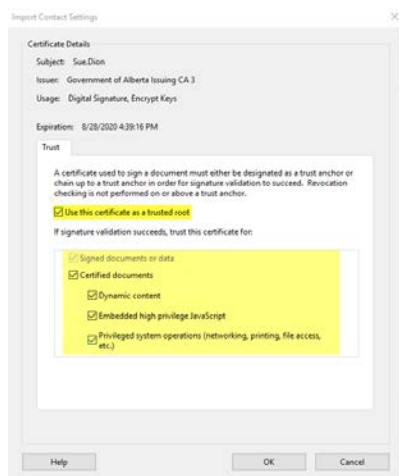
8. Click **OK** in the **Import Contact Settings** pop-up.
9. Revalidate the signatures on the page.