Office of Sponsored Programs Guide to Proposal Routing, Certification and Approval Using Adobe Acrobat Professional 8.0

Overview

The Office of Sponsored Programs and Contracts (OSP) utilizes electronic routing of proposals and other research-related materials requiring review and approval by departments and the administration. This process utilizes Baylor's own BearSpace and the Digital ID capabilities of Adobe Acrobat.

The OSP BearSpace site serves as a repository for proposal materials, allowing for academic and administrative reviews and approvals. This site may also be used by the principal investigator(s) during the proposal writing process, allowing for collaborative interactions using a common, accessible directory.

Using the Digital ID (signature) capabilities of Adobe Professional 8.0 or higher (available for download at the Baylor ITS AppCenter), certifications and approvals can be performed electronically. The digital signature, once created, is the easiest format to use to provide approvals and verify the identity of the approver.

A. Setting-up Adobe Professional and Establishing a Digital ID

Download Adobe Acrobat Professional 8.0 or higher.

- 1. Access the Baylor ITS AppCenter https://www.baylor.edu/appcenter/bin/core.asp?path=home>.
- 2. Use your Bear ID and password to enter the site.
- 3. Choose I Agree.
- 4. Open the **Acrobat** folder.
- 5. Click the **Install Package** button.
- 6. Click the **Run** button to install to software.
- 7. Once complete, restart your computer to complete the final installation.

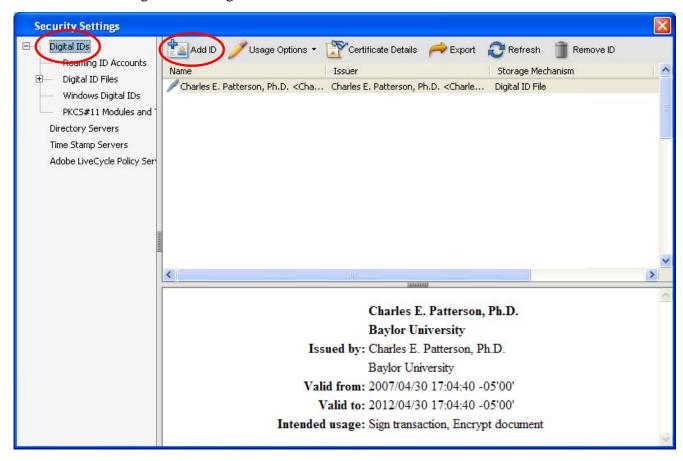
Creating a Digital ID

Using Adobe to create a Digital ID and using it to sign documents is easy. Just follow these simple steps:

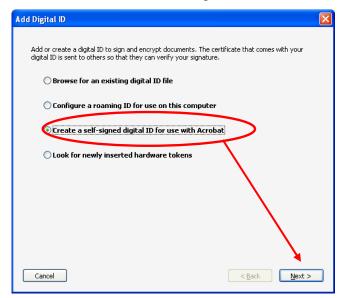
- 1. Open Adobe Acrobat.
- 2. From the toolbar, select: **Advanced** > **Security Settings**.



3. Select **Digital IDs** on the left, click **Add ID** on the right, and then follow the instructions in the Add Digital ID dialog box.



- 4. Select Create a Self-Signed Digital ID and click Next.
- 5. In the second Add Digital ID window, select New PKCS#12 Digital ID file and click Next.



- Add Digital ID

 Where would you like to store you celf-signed digital ID?

 New PKCS#12 digital ID file

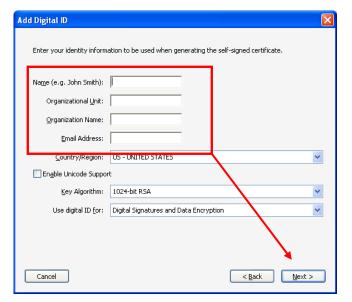
 Creates a new password protected digital ID file that uses the standard PKCS#12 format. This common digital ID file format is subported by most security software applications, including major web browsers. PKCS#12 file3have a .pfx or .p12 file extension.

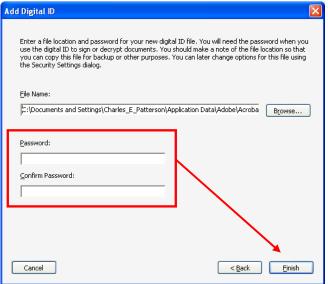
 Windows Certificate Store

 Your digital ID will be stored in the Windows Sertificate Store where it will also be available to other Windows applications. The digital ID will be protected by your Windows login.

 Cancel
- 6. In the next Add Digital ID window, complete the following information:
 - a. Name,
 - b. Organizational Unit (College/School),
 - c. Organization Name (Baylor),
 - d. Email Address,
 - e. Select Next.
- And in the final Add Digital ID window, complete the Password and Confirm Password fields, and select **Finish**.

You have now created your Digital ID.





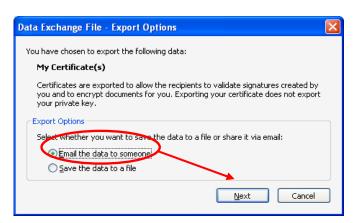
B. Exchanging Certificates for Verifying Signatures

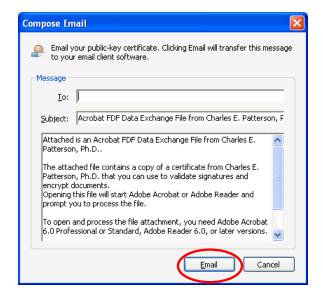
For purposes of verifying digital signatures by the OSP, the office must have Digital ID Certificates on file. These may be sent via email to the OSP.

 Highlight the digital signature you just created by clicking the appropriate signature field (in blue below) and select Export. Or, if needed, first select Advanced > Security Settings, Digital IDs.



2. Select Email the data to someone, click Next.





3. Do not enter an email address, but instead select **Email**. This will open your Outlook e-mail window to review and send the e-mail. Type the e-mail address of the person(s) to whom you are exporting your digital certificate (**sponsored_programs@baylor.edu**). Close window.

The OSP will have your Digital ID Certificate on file and will verify all electronic signatures. If a signature is received and a Certificate is not on file, a request for a Certificate will be issued by the OSP.

C. How to Sign a Document Using a Digital Signature

1. Open the document you want to sign, make sure the document is finalized and ready for approval (signing).

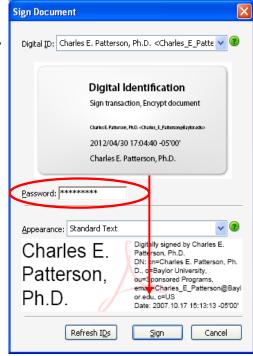
- 2. To apply the digital signature to the document:
 - a. Click on the appropriate digital signature field,
 - b. Type in the password for the signature,
 - c. Click **Sign** and review your signature:



3. Save the document to your computer for upload into the OSP BearSpace site.

Please ignore any icons (question marks or "yield signs") that may appear over the signature line.

Signatures will be verified upon receipt in the OSP.



The signed document must be saved to your computer so that it may be uploaded to the OSP BearSpace.

<u>Note:</u> The previous procedure may differ slightly if the document being signed is opened within a web browser, as opposed to being open within Adobe Acrobat. Regardless, the signing official must <u>SAVE</u> the document to the computer for upload into BearSpace.

For detailed instructions on utilizing Baylor's BearSpace for proposal routing, please see the *Guide to Utilizing BearSpace for Proposal Routing and Approval* at http://www.baylor.edu/research/osp/forms.