

Everything You Need to Know to Use Your Personal Digital Certificate at the Health Science Center

Adobe Reader

When properly used, personal digital certificates allow the user to be definitively identified as the sender of an e-mail, as the final authority on a word processing document or spreadsheet, or as the signer of a PDF (Portable Document Format) file. This non-repudiation, especially for PDF files, is frequently used as a suitable substitute for a hand-written signature. In fact, digitally signing PDF files is the preferred format for distribution of certain documents at the Health Science Center.

The following topics are available:

Installing your certificate in your browser (**go here first!**)

Using your certificate with your Outlook 2010 e-mail

Using your certificate with Adobe Reader XI

Using your certificate with Microsoft Word 2010

Using your certificate with Microsoft Excel 2010

In the instructions, names found on windows, panes on windows, or buttons will be presented in ***Arial bold italics***. This will help you navigate and give you something to look for on the screen. Images of screens in this document may vary slightly from your computer, but are representative of the product versions most common at the Health Science Center.

Using Your Digital Certificate With Adobe Reader XI

Installing your certificate in Adobe Reader

1. Open Adobe Reader.
2. Click **“Edit”** in the upper-left-hand corner.
3. Click **“Preferences”**.
4. On the left side of the **“Preferences”** window, click **“Signatures”**.
5. Click the **“More ...”** button in the **“Identities & Trusted Certificates”** pane.
6. In the **“Digital ID and Trusted Certificate Settings”** window, click the **“Add ID”** button.
7. Click the radio button next to **“My existing digital ID from:”** and the radio button next to **“A file”**, then click the **“Next”** button.
8. In the **“Add Digital ID”** window, click the **“Browse...”** button.
9. Using the **“Locate Digital ID File”** window, navigate to where your digital certificate file is located, select the file, and click **“Open”**.
10. When the **“Add Digital ID”** window becomes visible again, enter the password or PIN used when downloading the digital certificate and click the **“Next”** button.
11. In the **“Add Digital ID”** window, select the certificate you just added and click the **“Finish”** button.
12. The new certificate and its details should now appear in the **“Digital ID and Trusted Certificate Settings”** window; close this window.
13. In the **“Preferences”** window, click the **“More...”** button in the **“Creation & Appearance”** pane.
14. Now we’re going to set up how your digital certificate will be presented when you sign PDF documents. In the **“Creation and Appearance Preferences”** window, make sure the settings are as shown below:
 - **Default Signing Method:** – Adobe Default Security
 - **Default Signing Format:** **PKCS#7** – Detached
 - **When Signing:** – Include signature’s revocation status
 - **Enable Review of Document Warnings:** – When certifying a document
 - **Prevent Signing Until Warnings Are Reviewed:** – NeverClick the **“New...”** button in the **“Appearances”** pane. The **“Configure Signature Appearance”** window will open.
15. If you choose to have only the details of your certificate shown, click the radio button next to **“No graphic”** in the **“Configure Graphic”** pane. The **“Preview”** pane shows how the

details-only certificate will display. Give the appearance a title; in this example, the title is **"No Name"**. Click the **"OK"** button.

16. You may want to have an easily readable name associated with the details of your certificate. If so, click the radio button next to **"Name"** in the **"Configure Graphic"** pane. The sample appearance will appear in the **"Preview"** pane. Give the appearance a title; in this example, the title is **"My Name"**. Click the **"OK"** button.
17. You may create as many appearances as you wish by clicking the **"New..."** button in the **"Appearances"** pane of the **"Creation and Appearance Preferences"** window. Each appearance will be listed in the **"Appearances"** list. You may also edit and delete any appearances from this window. When complete, click the **"OK"** button.
18. Click **"OK"** to close the **"Preferences"** window. Your certificate is now installed.

DRAFT

Signing a PDF document

PDF documents can be signed in one of two ways – inserting a signature window, and clicking an existing signature block.

To sign a PDF document by inserting a signature window

1. Open Adobe Reader and click the **“Fill & Sign”** button in the upper-right-hand corner.
2. Click on **“Work with Certificates”**.
3. Click on **“Sign with Certificate”**
4. Adobe Reader will give you the opportunity to set the signature window in a place and size of your choosing. Click the **“Drag New Signature Rectangle...”** button.
5. Place the pointer icon in the location for the upper-left-hand corner of the rectangle and drag the box to the desired size.
6. When you release the mouse button, the **“Sign Document”** window will open. Make sure your desired signature is in the **“Sign As:”** pull-down menu. The **“Appearance:”** pull-down menu defaults to **“Standard Text”** as shown in the display window below the pull-down menu; you can use this appearance or any other you may have created earlier. When you have the appearance as you wish, click the **“Sign”** button.
7. Confirm you wish to sign the document when the **“Request For Permission to Use a Key”** window opens by clicking the radio button next to **“Grant permission”** and clicking the **“OK”** button.
8. The digital certificate will now appear in the signature window you drew in Step 5, and will resize to fit into the window.
9. You will now be required to save the signed PDF; you may keep the same filename and location or save it elsewhere. Once done, you may close Adobe Reader.

To sign a PDF document with an existing signature block

1. Open the document in Adobe Reader and scroll down till you find the signature block. The signature block can be identified by the red pointer in its upper-left-hand corner. Simply click in the window.
2. When you click in the signature block, the **“Sign Document”** window will open. Make sure your desired signature is in the **“Sign As:”** pull-down menu. The **“Appearance:”** pull-down menu defaults to **“Standard Text”** as shown in the display window below the pull-down menu; you can use this appearance or any other you may have created earlier. When you have the appearance as you wish, click the **“Sign”** button.
3. Confirm you wish to sign the document when the **“Request For Permission to Use a Key”** window opens by clicking the radio button next to **“Grant permission”** and clicking the **“OK”** button.

4. The digital certificate will now appear in the signature block, resized to fit into the window.
5. You will now be required to save the signed PDF; you may keep the same filename and location or save it elsewhere. Once done, you may close Adobe Reader.

DRAFT