Electronic Filing System
Setting Up Your Adobe Acrobat® Digital ID
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To apply your electronic signature to electronic forms, you must first set up a Digital ID in Adobe Acrobat using the digital certificate you received from Juricert. This document describes the steps required.

Your digital certificate file is password protected and secure from unauthorized access. Your digital certificate file is called "your name + serial# .pfx".

The main steps to set up your Acrobat Digital ID are:

1. Store your Digital Certificate File in a Secure Location.
2. Set Up Your Digital ID in Adobe Acrobat.
3. Set Up Your Electronic Signature.

1. STORE YOUR DIGITAL CERTIFICATE FILE IN A SECURE LOCATION

For secure storage of your digital certificate file, follow these steps:

1. Store your digital certificate file in a secure location on your system. It is best to create a separate directory to store it such as C:\MyCertificate.
2. Make a backup copy of your digital certificate file. You can create this backup on a co-worker's computer or shared office file server. For added security, you may wish to store your digital certificate file on a removable device such as a USB flash memory drive or a compact disk so that it is not physically stored on your computer. If you choose this storage option, please remember to store the backup copy in a secure physical location.

2. SET UP YOUR DIGITAL ID IN ADOBE ACROBAT

There are four steps to set up your Digital ID in Adobe Acrobat:

a. Remove older Acrobat Digital ID digital certificate files.
b. Install your Acrobat Digital ID.
c. Change your Digital ID password.
d. Apply your digital signature.

IMPORTANT:
Setup differs for each version of Adobe Acrobat.
Please ensure that you follow the setup described for the specific version of Adobe Acrobat installed on your computer.

For Version 9 Acrobat

A: Remove Older Acrobat Digital ID Digital Certificate Files

If you are installing a new digital certificate file received from Juricert, you should remove older versions of. pfx digital certificate files which are no longer required. To remove older versions:

1. Select **Advanced** and then **Security Settings**.
2. In the Security Setting dialog box, click **+ Digital ID Files** and click the **filename** to highlight and identify the file to be removed.
3. Click the **Detach File icon**.

In some instances, e.g., when dealing with older digital certificate files, you may receive an error message indicating the file cannot be detached. In these cases you will have to physically delete the .pfx file from the directory in which it was stored, e.g., C:\MyCertificate, using a program such as Windows Explorer.

B: Install Your Acrobat Digital ID

Opening Adobe Acrobat using this document will help you set up and test your digital signature. See section 3 below called "Set Your Electronic Signature Appearance" for further details.

NOTE: The default certificate security method is pre-set to "Adobe Default Security" which is the preferred method so there is no need to alter this setting.

1. In Acrobat, select **Advanced** and then **Security Settings**.
2. In the Security Settings dialog box, click **+ Digital IDs** and then click **Add ID icon**.
3. In the Add Digital ID dialog box, select **My existing digital ID from...A file** and click **Next**.
4. In the Browse for a Digital ID file dialog, click **browse**, and navigate to the folder where you stored the file you received from Juricert, e.g., C:\MyCertificate\mynameSerial#.pfx.
5. Double click the **filename** which will now appear in the dialog box.
6. Enter your *Juricert Digital Certificate password* which you provided when you requested the certificate and click **Next**.
7. Acrobat will display your new Digital ID in the Add Digital IDs box, click **Finish**. This will return you to the Security Setting dialog box which now includes your new Digital ID.
8. Click once on your **Digital ID** to highlight it, then click the **Usage Options icon** and select the option **Use For Signing** to establish this as the default Digital ID you will use to digitally sign forms.

C: Change Your Digital ID Password

1. Select **Advanced** and then **Security Settings** and click **Digital ID Files**.
2. In the dialog box displayed, select and highlight with a single click the **filename** for which Digital ID you want to change the password. In most cases, there will only be a single filename with your name displayed with a .pfx extension.
3. After the file is selected and highlighted, you can click **Change Password** which will display the Change Digital ID File Password dialog box and/or click **Password Timeout** to select the **password entry option**, i.e., always / never / once- per-session / timeout-after-specified-interval.

NOTE: If you have installed and are using an older style .apf digital certificate file, you cannot change the password as this is treated as a "read-only" file in Acrobat V9. You can request and install a new .pfx digital certificate file from Juricert which will permit passwords to be changed in Acrobat V9.

D: Apply Your Digital Signature

1. Click the **empty digital signature box** at the top/bottom of the form to be signed.
2. In the Sign Document dialog box, enter *your Digital Certificate password*, and if not already selected, select the appropriate **Appearance Profile** (e.g. "Sign EFS Documents") from the pull-down selection list (see Section 3, "Set Your Electronic Signature Appearance" for further details).
3. Click **Sign**.
4. In the Save As dialog box, you can optionally select a **different destination folder** and specify a new filename for the signed form file.

TIP: A good convention is to add the suffix "signed" to the filename.

5. Click **Save** to sign and save the form file. Your digital signature is applied to the file and a notation inserted into the digital signature box.

NOTE: You can undo a digital signature if you change your mind before closing Acrobat. Right click your mouse on the signed digital signature box and select **Clear Signature**. The digital signature cannot be removed after the file has been saved and closed and/or after Acrobat is closed.

For Version 10 Acrobat

A: Remove Older Acrobat Digital ID Digital Certificate Files

If you are installing a new digital certificate file received from Juricert, you should remove older versions of .pfx Digital Certificate files which are no longer required. To remove older versions:

1. Select **Tools,** then **Sign and Certify,** then **Security Settings.**
2. In the Security Settings dialog box, click **+ Digital ID Files** and click the **filename** to highlight and identify the file to be removed, and then click the **Remove ID icon**.

IMPORTANT: You will receive a warning that this action will permanently remove the certificate from your folder. It is recommended that you save a copy of the certificate file in another place before taking this action unless you are certain you will never need it again.

In some instances, e.g., when dealing with older digital certificate files, you may receive an error message indicating the file cannot be detached. In these cases you will have to physically delete the .pfx file from the directory in which it was stored, e.g., C:\MyCertificate, using a program such as Windows Explorer.

B: Install Your Acrobat Digital-ID

Opening Adobe Acrobat using this document will help you set up and test your digital signature. See section 3 below called "Set Your Electronic Signature Appearance" for further details.

> **NOTE**: The default certificate security method is pre-set to "Adobe Default Security" which is the preferred method so there is no need to alter this setting.

1. Select **Tools** and **Protection,** then **More Protection,** then **Security Settings.**
2. In the Security Setting dialog box, click **+ Digital IDs** and then click the **Add ID icon**.
3. In the Add Digital ID dialog box, select **My existing digital ID from...A file** and click **Next**.
4. In the Browse for a Digital ID file dialog box, click **Browse**, and navigate to the folder where you stored the file you received from Juricert, e.g., C:\MyCertificate\mynameSerial#.pfx
5. Double click the **filename** which will now appear in the dialog box.
6. Enter your *Juricert Digital Certificate password* which you provided when you requested the certificate and click **Next**.
7. Acrobat will display your new Digital ID in the Add Digital IDs box, click **Finish**. This will return you to the Security Setting dialog box which now includes your new Digital-ID.
8. Click once on **your Digital ID** to highlight it, then click the **Usage Options icon** and select the option **Use For Signing** to establish this as the default Digital ID you will use to digitally sign forms.

C: Change Your Digital ID Password

1. Select **Tools** and **Protection,** then **More Protection,** then **Security Settings,** then then click **Digital ID Files**.
2. In the dialog box displayed, select and highlight with a single click the **filename** for which you want to change the password. In most cases, there will only be a single filename with your name displayed with a .pfx extension.
3. After the file is selected and highlighted, you can click **Change Password** which will display the Change Digital ID File Password and/or click **Password Timeout** to select the password entry option, i.e., always / never / once- per-session / timeout-after-specified-interval.

> **NOTE**: If you have installed and are using an older style .apf digital certificate file, you cannot change the password as this is treated as a "read-only" file. You can request and install a new .pfx digital certificate file from Juricert which will permit passwords to be changed in Acrobat V10.

D: Apply Your Digital Signature

1. Click the **empty digital signature box** at the top/bottom of the form to be signed.
2. In the Sign Document dialog box, enter *your Digital Certificate password*, and if not already selected, select the appropriate **Appearance profile** (e.g. "Sign EFS Documents") from the pull-down selection list (see the Setting your Digital Signature Appearance section for further details).
3. Click **Sign**.
4. In the Save As dialog box, you can optionally select a different destination folder and specify a new filename for the signed form file.

> **NOTE**: A good convention is to just add the suffix "signed" to the filename.

5. Click **Save** to sign and save the form file. Your digital signature is applied to the file and a notation inserted into the digital signature box.

For Version 11 Adobe Acrobat

A: Remove Older Acrobat Digital ID Digital Certificate Files

If you are installing a new digital certificate file received from Juricert, you should remove older versions of .pfx digital certificate files which are no longer required. To remove older versions:

1. Select **Edit** and **Preferences** and **Signatures** and **Identities & Trusted Certificates** and then **More**.
2. In the Identities and Trusted Certificates dialog box, click **+ Digital ID Files** and click the **filename** to highlight and identify the file to be removed, and then click the **Remove ID icon**.

> **IMPORTANT**: You will receive a warning that this action will permanently remove the certificate from your folder. It is recommended that you save a copy of the certificate file in another place before taking this action unless you are certain you will never need it again.

In some instances, e.g., when dealing with older digital certificate files, you may receive an error message indicating the file cannot be detached. In these cases you will have to physically delete the .pfx file from the directory in which it was stored, e.g., C:\MyCertificate, using a program such as Windows Explorer.

B: Install Your Acrobat Digital ID

Opening Adobe Acrobat using this document will help you set up and test your digital signature. See section 3 below called "Set Your Electronic Signature Appearance" for further details.

> **NOTE**: The new default security (enhanced) method is pre-set to "Protected View" off and "Enhanced Security" is left unchecked. "Automatically trust sites from my Win OS Security zones" is left checked by default. These settings are compatible with EFS so there is no need to alter these preference settings.

1. Select **Edit,** then **Preferences,** then **Signatures,** then **Identities & Trusted Certificates** and then **More.**
2. In the Digital ID and Trusted Certificate Settings dialog box, click **+ Digital IDs** and then click the **Add ID icon**.
3. In the Add Digital ID dialog box, select **My existing digital ID from...A file** and click **Next**.
4. In the Browse for a Digital ID file dialog box, click **browse** and navigate to the folder where you stored the file received from Juricert, e.g., C:\MyCertificate\mynameSerial#.pfx
5. Double click the **filename** which will now appear in the dialog box. Enter *your Juricert Digital Certificate password* which you provided when you requested the certificate and click **Next**.
6. Acrobat will display your new Digital ID in the Add Digital IDs box, click **Finish**. This will return you to the Digital ID and Trusted Certificate Settings dialog box which now includes your new Digital ID.
7. Click once on your **Digital ID** to highlight it, then click on the **Usage Options icon** and select the option **Use For Signing** to establish this as the default Digital ID you will use to digitally sign forms.

8. Click **OK** in the Digital Signatures screen.

<u>C: Change your Digital ID Password</u>

1. Select **Edit,** then **Preferences, then Signature, then Identities &Trusted Certificates,** then **More**
2. In the dialog box displayed, select and highlight with a single click the **filename** for which you want to change the password. In most cases, there will only be a single filename with your name displayed with a .pfx extension.
3. After the file is selected and highlighted, you can click **Change Password** which will display the Change Digital ID File Password dialog box and/or click **Password Timeout** to select the password entry option, i.e., always / never / once- per-session / timeout-after-specified-interval.

<u>D: Apply Your Digital Signature</u>

1. Click the **empty digital signature box** at the top/bottom of the form to be signed.
2. In the Sign Document dialog box, enter *your Digital Certificate password*, and if not already selected, select the appropriate Appearance profile, e.g., "Sign EFS Documents") from the pull-down selection list (see the Setting your Electronic Signature Appearance section for further details).
3. Click **Sign**.
4. In the Save As dialog box you can optionally select a different destination folder and specify a new filename for the signed form file (a good convention is to just add the suffix "signed" to the file name). Click **Save** to sign and save the form file. Your digital signature is applied to the file and a notation inserted into the digital signature box.

3. SET YOUR ELECTRONIC SIGNATURE APPEARANCE

For Versions 9, 10 and 11 Acrobat

You should set the digital signature appearance settings in Acrobat to meet the guidelines established for EFS to ensure digital signature information is displayed and printed legibly.

1. Click one of these digital signature boxes to set and/or test the appearance of your signature:

2. Depending on your version of Acrobat, do the following:
   - In Acrobat 9 and 10, select **Edit** and **Preferences** and then **Security.**
   - In Acrobat 11, select **Edit, Preferences, Signature, Identities &Trusted Certificates** and then **More**
3. Then in all versions of Acrobat, in the Appearance dialog box, click **New**.

4. In the Configure Signature Appearance dialog box, enter *a suitable Title*, e.g., "Sign EFS Documents".
5. Set Configure Graphic = Name and all other options "Off".
6. Set Configure Text = Distinguished Name and all other options "Off".
7. Click **OK** and then click **OK** in the Preferences dialog box to complete.