

Intermediate



Adobe Acrobat X Pro

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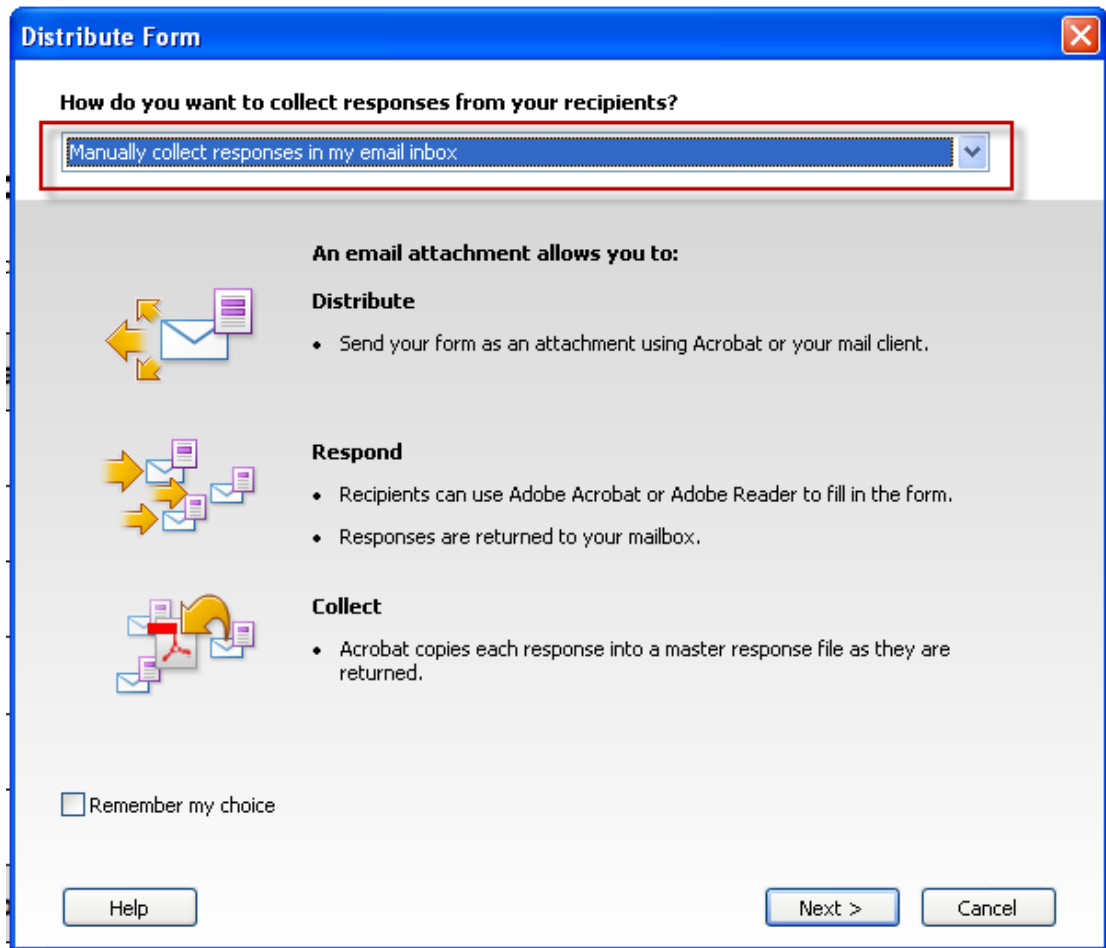
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Distributing Forms

Once you have finished setting up all the form fields, you may choose to send the form to others to fill out and return to you. To do so, you need again to be in 'Editing' and not 'Preview' mode.

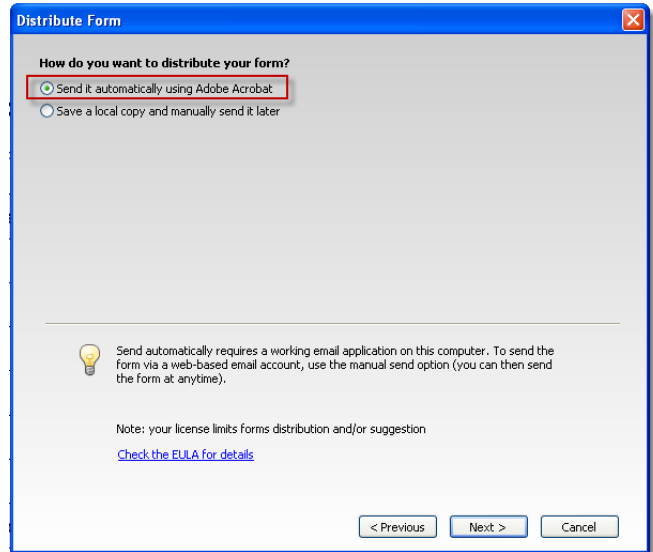
1. Under 'Tasks' on the right side of the screen, choose 'Distribute'.



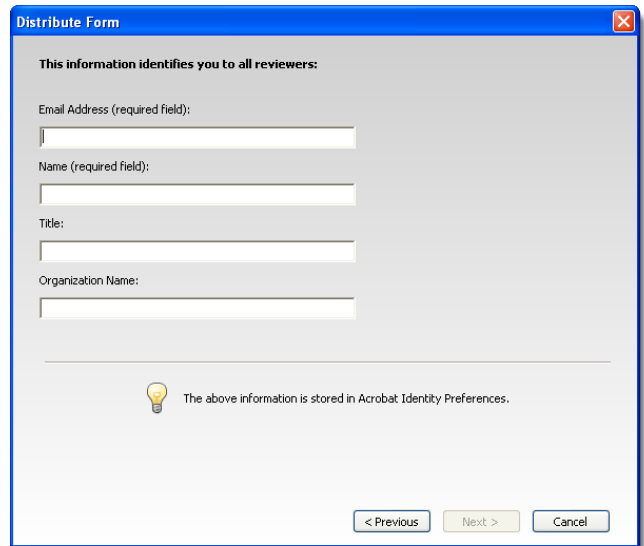
The 'Distribute Form' dialog box appears, with the choices of manually collecting responses in your email box, or automatically collecting them on your own internal server.

2. Select 'Manually collect responses in my email inbox' and then hit the 'Next' button.
3. The next screen asks, "How do you want to distribute your form?" You have two options:
 - a. Send it automatically using Adobe Acrobat
 - b. Save a local copy and manually send it later.

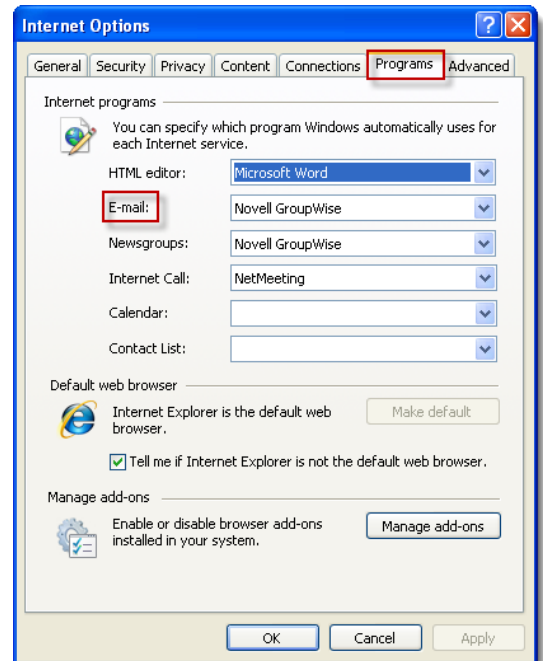
4. Choose to send the form automatically using Acrobat.
 - a. **Note:** To use this option, your computer requires a working desktop email application, (i.e. GroupWise, Outlook, etc.). If you do not have one, you will need to save a copy of the form to your computer and send it manually (the second option).
5. Click 'Next'.



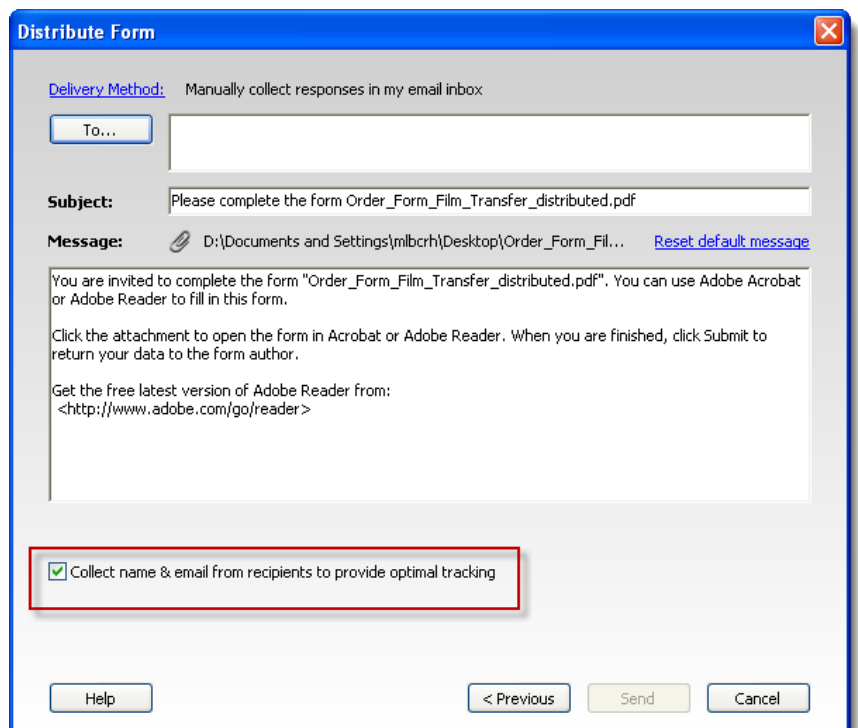
6. If this is your first time using this feature, Adobe Acrobat will prompt you to enter your information (i.e. email address, name, title, and organization). After you have entered the information and verified that all of it is correct, click the 'Next' button. If you have used this feature before, your information will be stored and you won't be prompted to enter this information again.



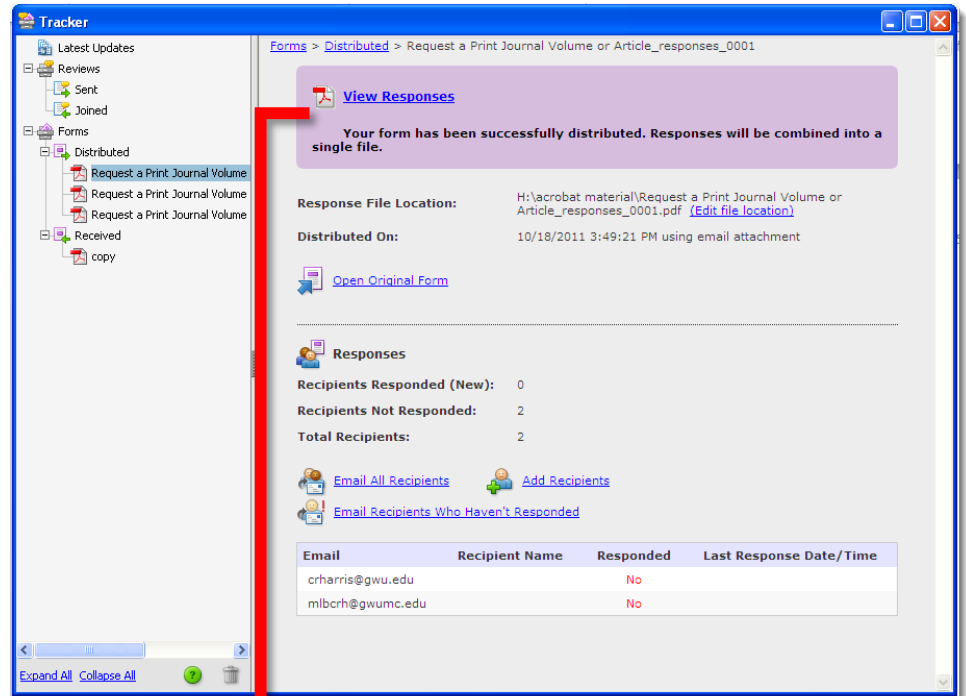
7. If you receive an error message indicating that you do not have a working desktop email application set up, then you will need to go to the Windows Control Panel to set it up.
 - a. From the Start menu on your computer, choose Settings > Control Panel > Internet Options.
 - b. Click on the Programs tab and click on the down arrow by the E-mail field to select your application.



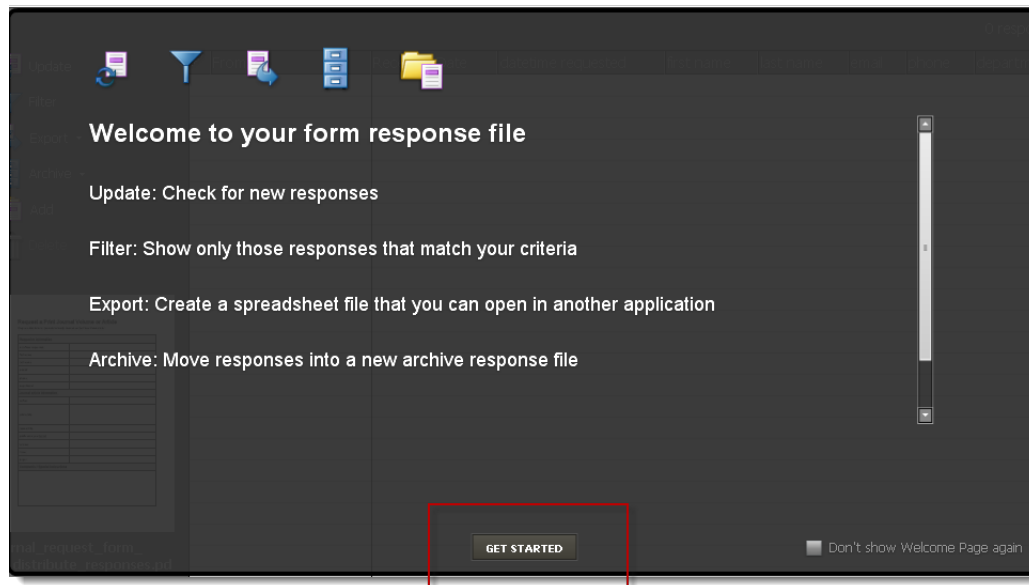
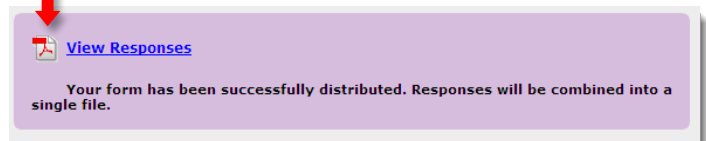
8. When the next dialog opens type the email address(es) of your recipient(s) in the 'To' section, separated by commas.
9. Although Adobe Acrobat provides default content for 'Subject' and 'Message', you can populate these sections with content tailored to your organization.
10. Make sure that the 'Collect name & email from recipients to provide optimal tracking' option is checked.
11. Then hit the 'Send' button.



Once you have sent the form, the 'Form Tracker' opens to help you track the form that has just been distributed. You will notice that it tracks recipients who have and have not responded to your email, as well as the total number of recipients who received the email. The tracker also allows you to add additional recipients at any time, and to email reminders to recipients who have not yet filled out the form. The Tracker also keeps track of the responses to the form.

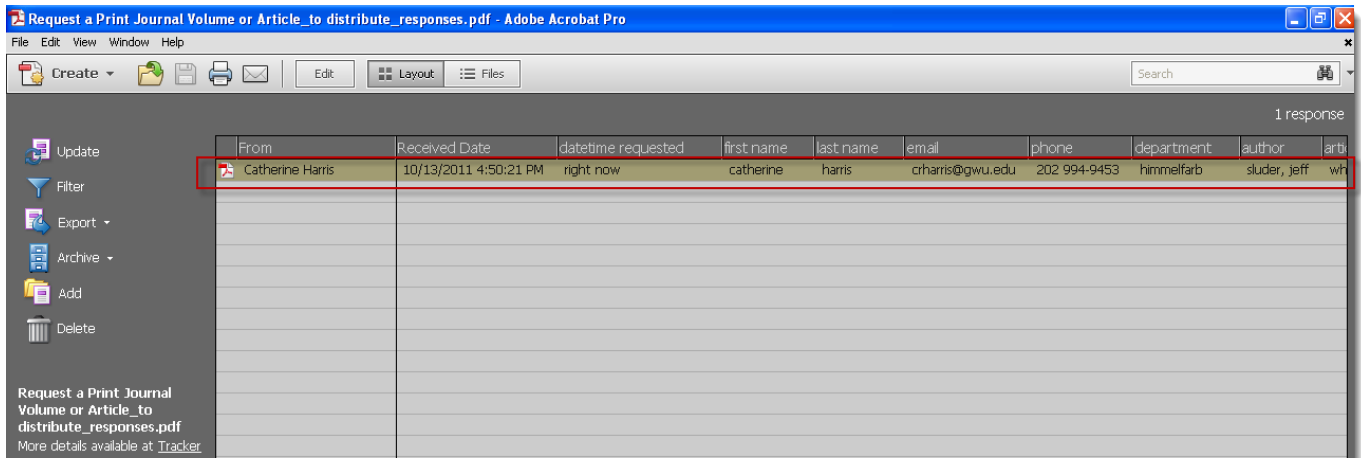


If you click on 'View Responses' in the Tracker, you will launch the 'Form Response File'.



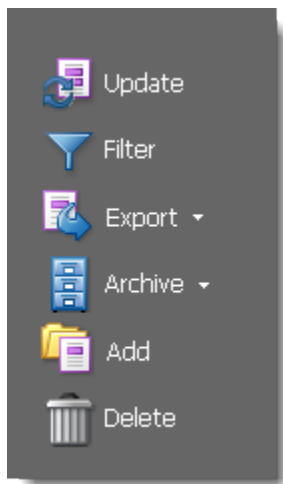
12. Click on 'Getting Started' at the bottom of the 'Welcome Screen'.

As responses come in, they will appear in the response file, as seen below.



The screenshot shows the Adobe Acrobat Pro interface with a response file open. The file name is "Request a Print Journal Volume or Article_to distribute_responses.pdf". The interface includes a menu bar (File, Edit, View, Window, Help) and a toolbar with options like Create, Edit, Layout, and Files. On the left, there is a sidebar with icons for Update, Filter, Export, Archive, Add, and Delete. The main area displays a table with one response entry highlighted in red. The table has columns for From, Received Date, datetime requested, first name, last name, email, phone, department, author, and arbitrary.

From	Received Date	datetime requested	first name	last name	email	phone	department	author	arbi
Catherine Harris	10/13/2011 4:50:21 PM	right now	catherine	harris	charris@gwu.edu	202 994-9453	himmelfarb	sluder, jeff	wr



The options on the left of the response file allow you to manipulate, update, and store collected data, among other things.

13. Close out the tracker file when done, saving the file if prompted.

Filling out and sending back a form you've received

1. Open the form attachment in your email and fill it out.
2. Next, click on 'Submit Form' near the upper right corner of the screen.
3. The 'Send Form' dialog box appears.
4. Enter your name and email address and press 'Send'.

A dialog box titled "Send Form" with a blue border and a close button (X) in the top right corner. On the left side, there is a small thumbnail of a form titled "Request a Print Journal Volume or Article". The main area contains the following fields:

- To:** mlbcrh@gwumc.edu
- Subject:** Submitting Completed Form
- Attachment:** journal_request_form__to_distribute_distributed[1].pdf
- From:** (empty)
- Email Address:** mlbcrh@gwumc.edu (text is highlighted in blue)
- Full Name:** Catherine Harris
- Remember me

At the bottom, there is a lightbulb icon and a message: "To save your email address and name in Acrobat's Identity preferences, check Remember me. Do not check this box if you are using a public computer." Below the message are two buttons: "Send" and "Cancel".

5. You'll be prompted to select an email client.
 - a. If you have GroupWise, Outlook or another desktop email application, then you should choose 'Desktop Email Application' and click OK. The form is automatically sent back to the sender.
 - b. If you select 'Internet Email', you will need to save the form and then create an email with the file attached and mail it to the sender.

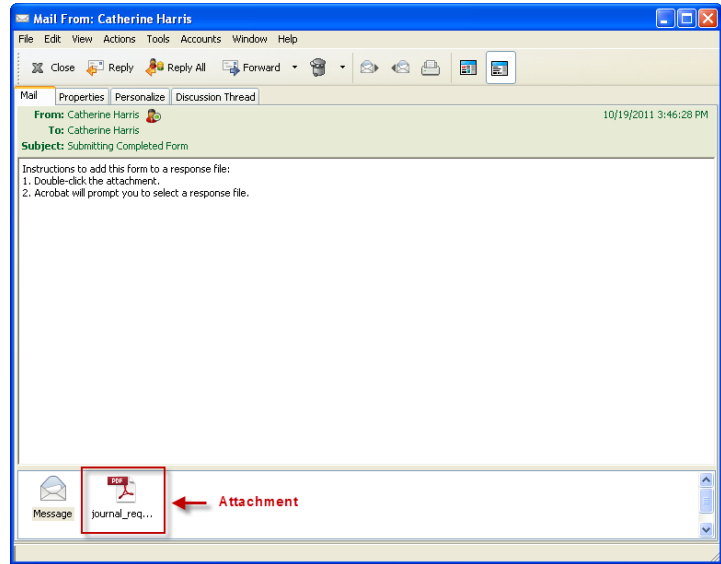
A dialog box titled "Select Email Client" with a blue border and a close button (X) in the top right corner. The text inside reads: "Please indicate the option which best describes how you send mail." There are two radio button options:

- Desktop Email Application**
Choose this option if you currently use an email application such as Microsoft Outlook, Eudora, or Mail.
- Internet Email**
Choose this option if you currently use an Internet email service such as Yahoo or Microsoft Hotmail. You will then need to save your form and return it manually to mlbcrh@gwumc.edu using your Internet email service.

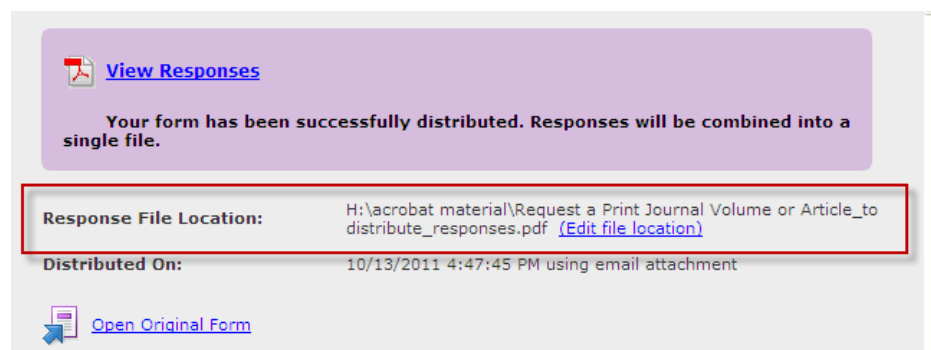
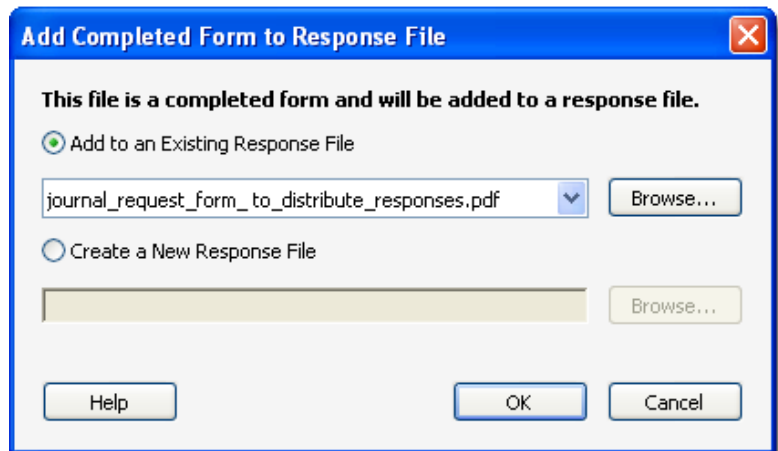
At the bottom, there is a checkbox labeled "Don't show again" and two buttons: "OK" and "Cancel".

Receiving a response

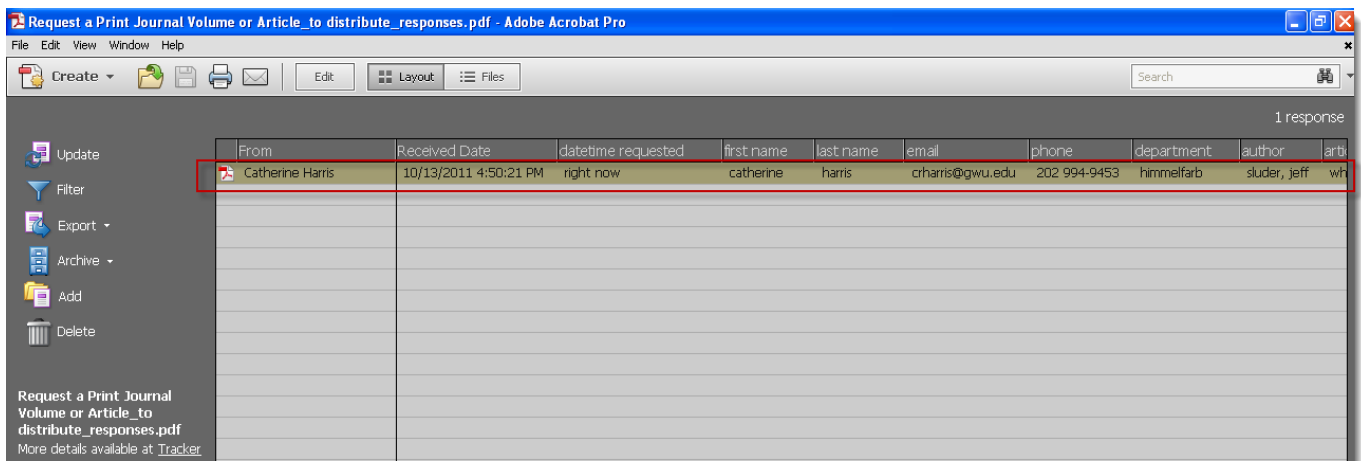
1. Open the attachment in your email.



2. You'll be prompted to add the completed form to your response file. The location of the response file already created should appear beneath 'Add to an Existing Response File', which you should select.
 - a. If the location is incorrect, click on the 'Browse' button to find the file's location. (NOTE: the location is listed on the Tracker screen.)

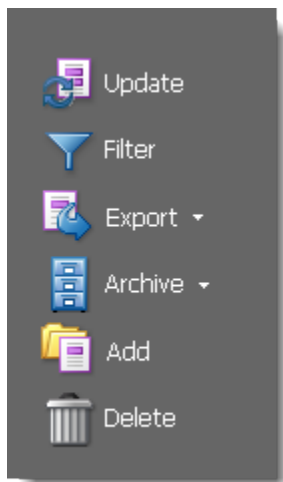


As responses come in, they will appear in the response file, as seen below.



The screenshot shows the Adobe Acrobat Pro interface with a response file open. The file name is "Request a Print Journal Volume or Article_to distribute_responses.pdf". The interface includes a menu bar (File, Edit, View, Window, Help) and a toolbar with options like Create, Edit, Layout, and Files. On the left, there is a sidebar with icons for Update, Filter, Export, Archive, Add, and Delete. The main area displays a table with the following data:

From	Received Date	datetime requested	first name	last name	email	phone	department	author	arbi
Catherine Harris	10/13/2011 4:50:21 PM	right now	catherine	harris	charris@gwu.edu	202 994-9453	himmelfarb	sluder, jeff	wr



The options on the left of the response file allow you to manipulate, update, and store collected data, among other things.

3. Close the tracker file when done, saving the file if prompted.

Digital Signatures

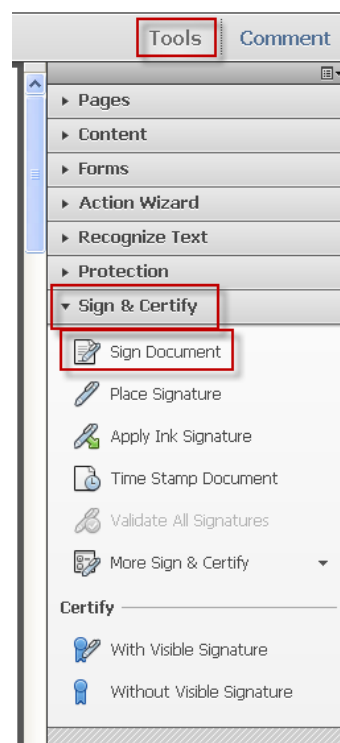
Digital signatures are the electronic equivalent of pen and paper signatures in that people use them to vouch for the integrity of a document's information. A digital signature can serve various purposes: to certify authorship, to approve a document's contents, to indicate that someone has reviewed a document, among others. Any subsequent changes to the document, whether authorized or unauthorized, will be noted by Acrobat. In signing a document, a person can even opt to lock the file so that no further alterations to it may occur.

In order to use a digital signature, you must also create a digital ID. This is the electronic equivalent of a driver's license or passport in that it proves your identity to others in an online environment. A digital ID usually holds your name, email address, the name of the company that issued the ID, a serial number, and an expiration date for the ID. People commonly request their digital ID online from a third-party vendor. Acrobat Pro offers a way to create your own digital ID from within the program. This method does not offer the same degree of security as going to a third party vendor, but will suffice for documents in most situations.

Contained in the digital ID is a digital signing certificate. You should send the certificate to those to whom you intend to email documents digitally signed by you. Information embedded in this certificate enables recipients to prove that the signature on your document actually came from you and not someone pretending to be you.

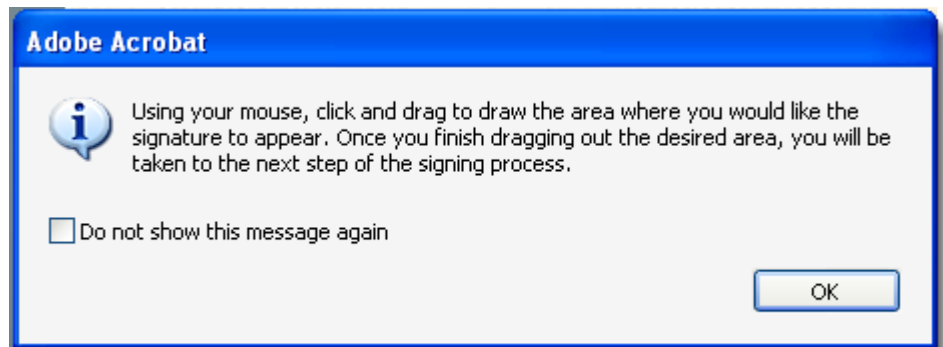
Digitally Sign a Document

1. Scroll to the location on your file where you wish to place the signature.
2. Click on 'Tools' > 'Sign and Certify' > 'Sign Document'.



A message appears explaining how to create a signature field.

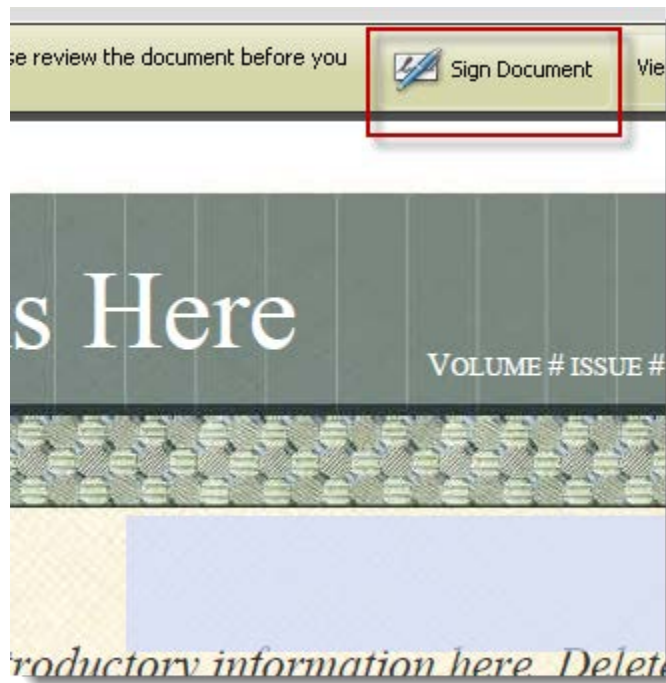
3. Click OK to remove the message. (You may also checkmark the box beside *Do not show this message again* if you no longer wish to view the prompt prior to signing files.)



Your mouse pointer will change to a crosshair and you can draw a box over the portion of your document where you wish to add your signature.

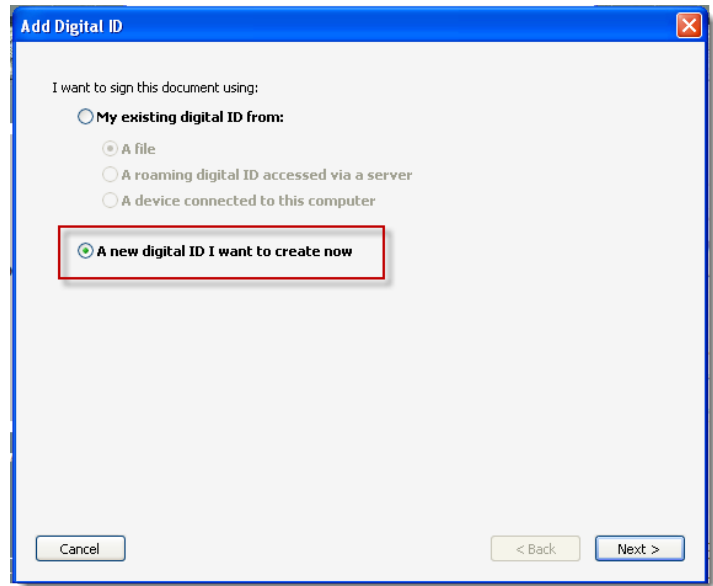
Acrobat will now display your document in 'Signature Preview' mode.

4. Click on Sign Document in the upper right portion of the window.

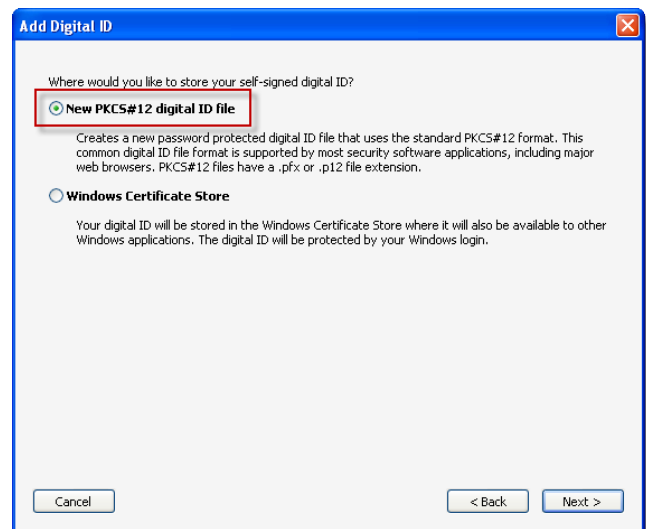


You will see the 'Add Digital ID' window.

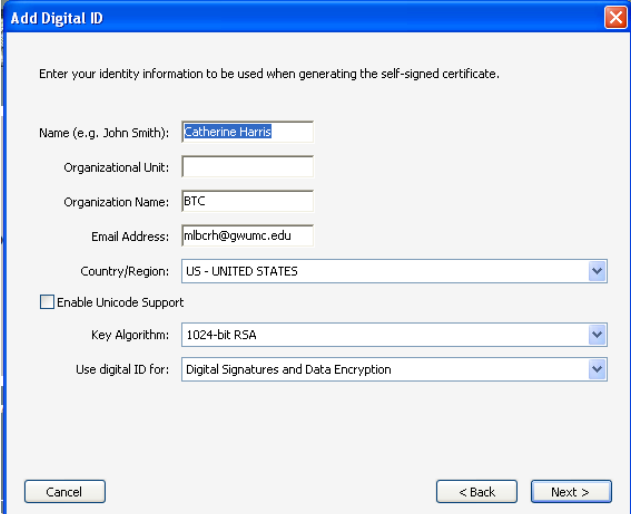
5. Click on 'A new digital ID I want to create now' and click 'Next'.



6. Select 'New PKCS#12 digital ID file', if it isn't already selected, and press 'Next'.



7. Enter your personal information. Leave the 'Key Algorithm' at the default of 1024-bit RSA.
8. By 'Use digital ID for:', select 'Digital Signatures'.
9. Click 'Next'.

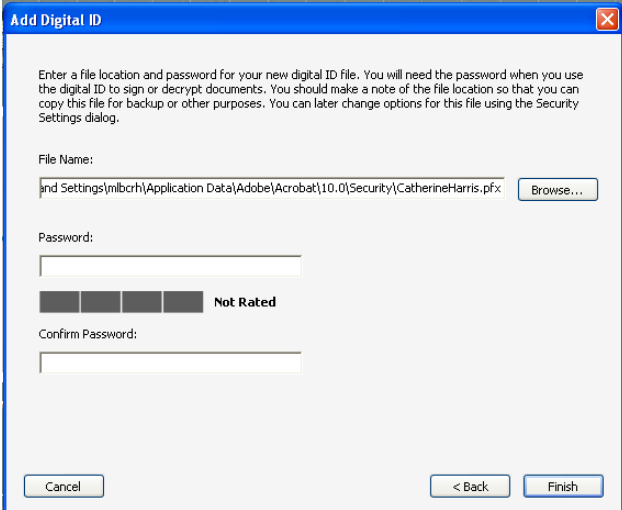


The 'Add Digital ID' dialog box contains the following fields and options:

- Name (e.g. John Smith): Catherine Harris
- Organizational Unit: (empty)
- Organization Name: BTC
- Email Address: mlbcrh@gwumc.edu
- Country/Region: US - UNITED STATES
- Enable Unicode Support
- Key Algorithm: 1024-bit RSA
- Use digital ID for: Digital Signatures and Data Encryption

Buttons: Cancel, < Back, Next >

10. Enter a password and then re-enter to confirm it.
11. Click 'Finish'.



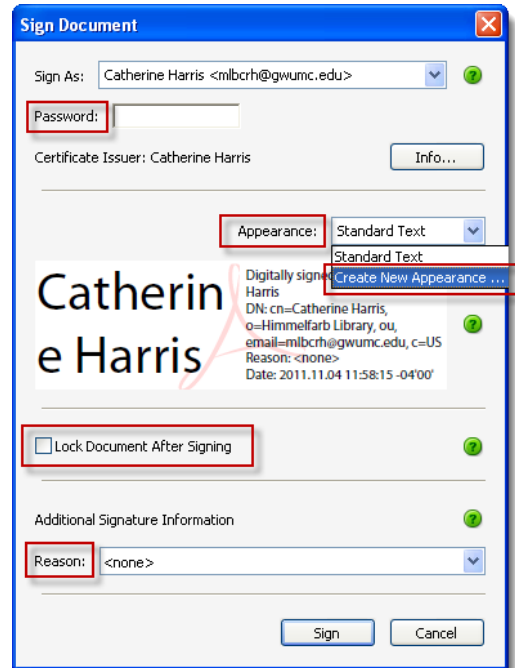
The 'Add Digital ID' dialog box contains the following fields and options:

- File Name: [nd Settings\mlbcrh\Application Data\Adobe\Acrobat\10.0\Security\CatherineHarris.pfx (Browse...)
- Password: (empty)
- Confirm Password: (empty)

Buttons: Cancel, < Back, Finish

The name you entered in the 'Add Digital ID' dialog box will appear in the window by 'Sign As:'. (NOTE: If you have created multiple signatures, you might need to click on the drop-down arrow by the 'Sign As:' window to locate the signature you wish to use.)

1. Enter your password (case-sensitive).
2. If you checkmark 'Lock Document After Signing', no one else can alter the document or add an additional signature.
3. Select the reason for the signature under 'Additional Signature Information'.
4. Click on the down arrow by the 'Appearance' drop-down window and select 'Create New Appearance...'

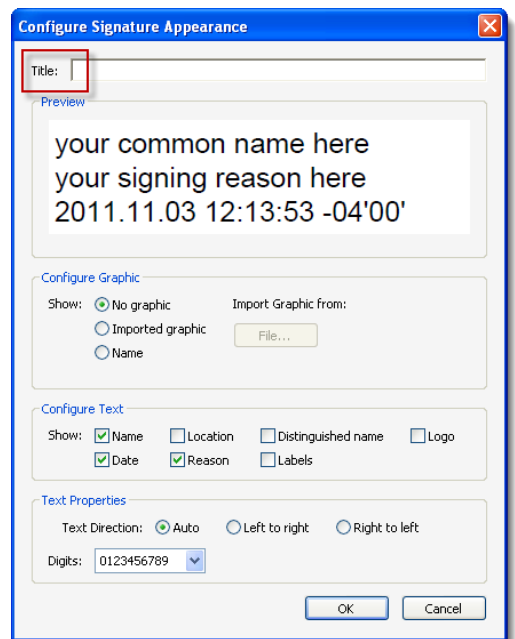


5. Give your Digital Signature a descriptive title that will enable you to identify it easily (in case you create multiple signatures).

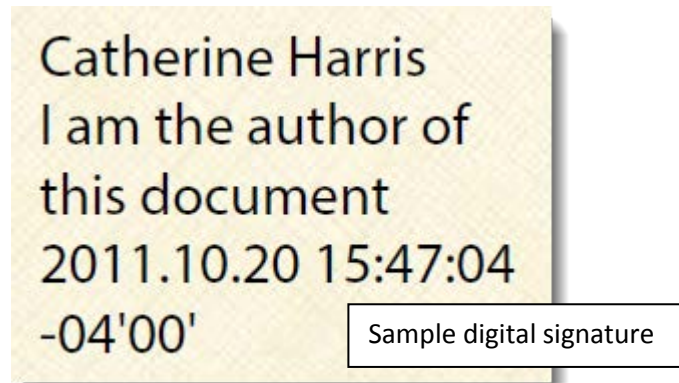
Under 'Configure Graphic', you may opt to add an image to your signature by selecting Imported Graphic and clicking on the 'File...' button to locate the image.

Under 'Configure Text', you would generally have selected to appear as part of your digital signature: your name, the date, and the reason for the signature.

6. Click OK in the 'Configure Signature Appearance' dialog box when done.
7. Back in the 'Sign Document' window, click OK to add your digital signature to the Acrobat file.



Your signature will appear on the document with whatever information you have chosen to display with it (e.g., name, date, reason for signing).



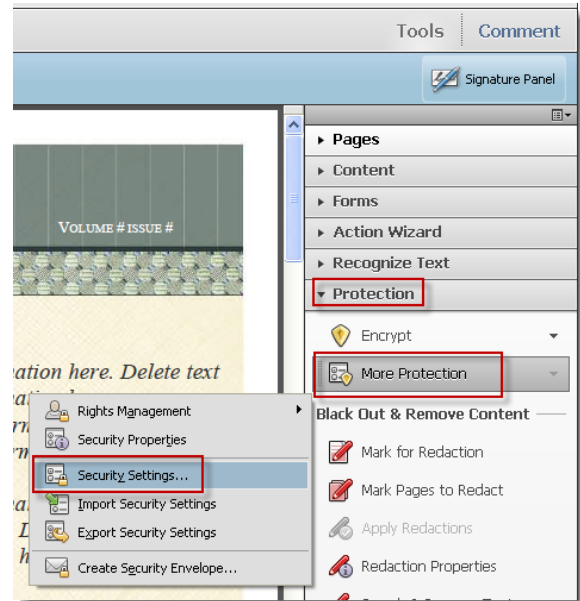
Everyone to whom you send this file will need to have a copy of your digital certificate in order to authenticate your digital signature. (See section, 'Share Your Digital ID with Others'.)

Share Your Digital Certificate with Others

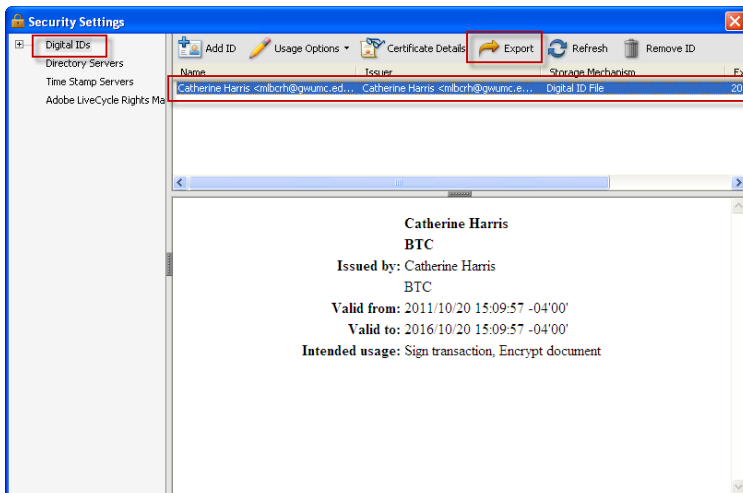
You will probably want to email in advance a copy of your digital signing certificate to those to whom you intend to send digitally signed documents. Those who receive copies of the certificate will have your name added to the list of trusted identities and can easily vouch for the authenticity of your digital signature.

To export your digital certificate,

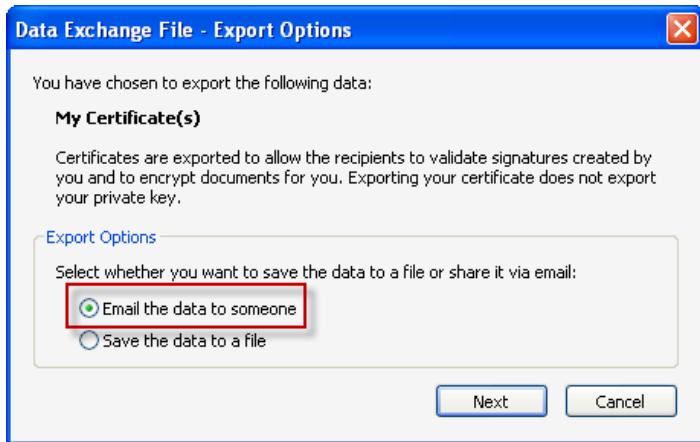
1. Click 'Tools' > 'Protection' > 'More Protection' > 'Security Settings...'



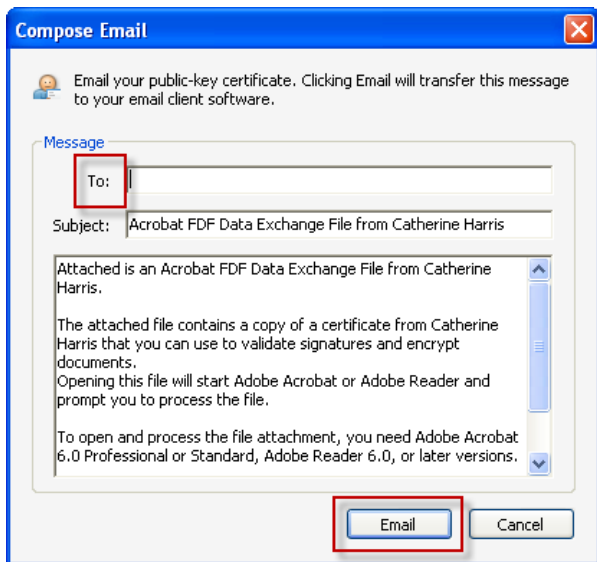
2. Click on 'Digital IDs' in the upper left corner of the 'Security Settings' window.
3. Click once on your digital certificate file listing and then choose 'Export'.



4. Choose 'Email the data to someone'.

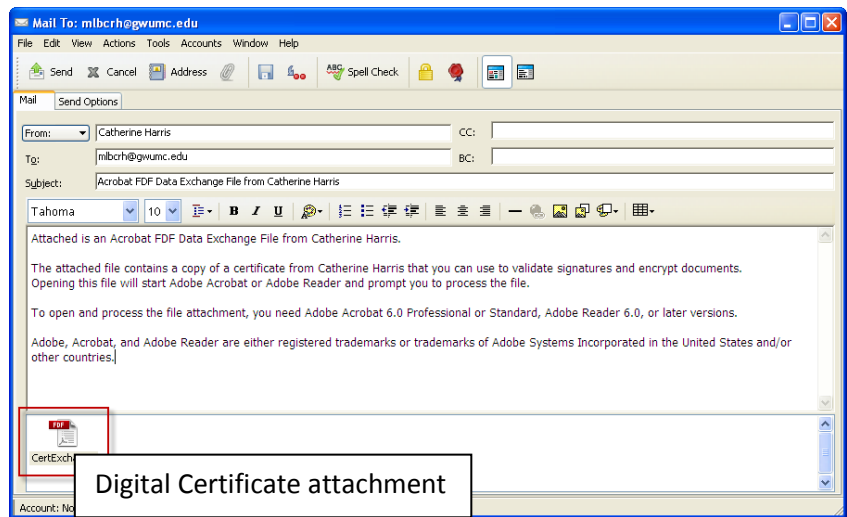


5. Enter email addresses in the 'To' field, separated by commas, and choose 'Email'.

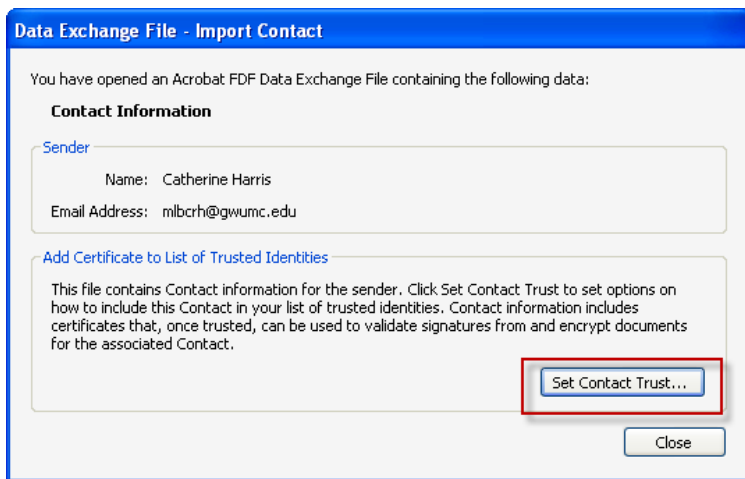


Your default email application opens and a message appears with your digital certificate attached, the email addresses entered, and an explanatory message entered in the body of the email.

6. Click 'Send'.



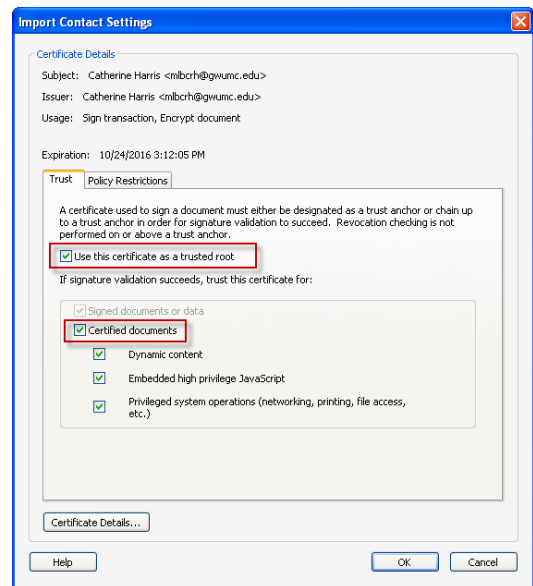
When the recipient opens up the certificate, (s)he will see this:



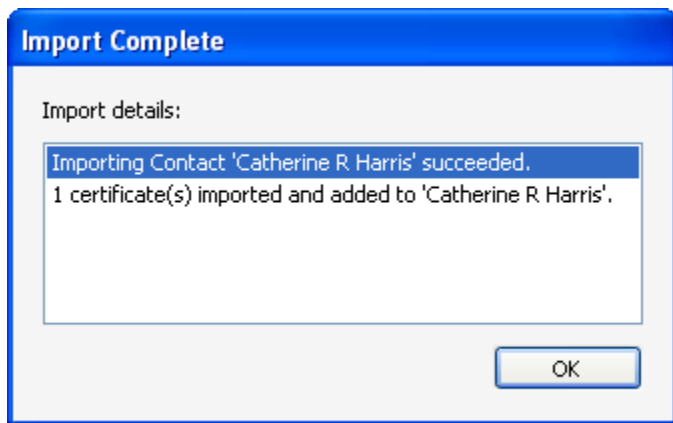
7. Click on 'Set Contact Trust...'.

In the 'Import Contact Settings' dialog box, to checkmark 'Use this certificate as a trusted root'. To allow actions that could potentially compromise document security, such as playing embedded video segments, checkmark 'Certified documents' and any of the boxes listed beneath it that you choose.

8. Click OK when done.



You'll see a message indicating that the import has succeeded.

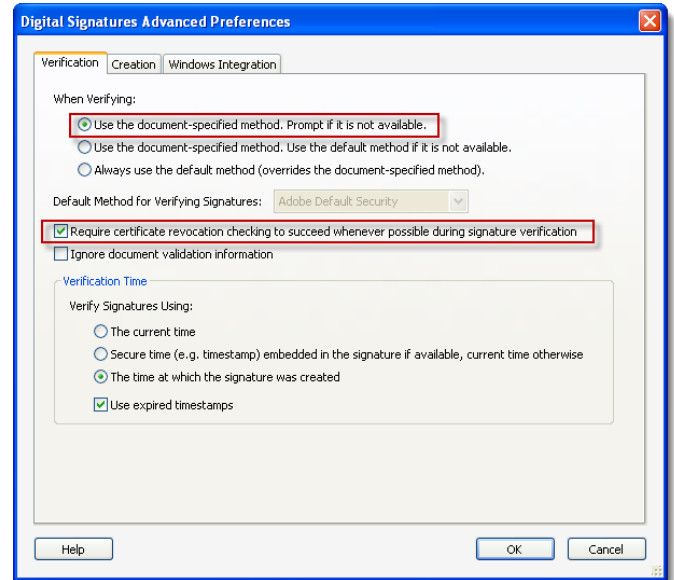


9. Click OK to close the message.

10. Close out the 'Data Exchange File – Import Contact' window.

Configure How You Verify Others' Signatures

1. On the Menu Bar, go to Edit > Preferences, and choose 'Security' from the list of categories on the left.
2. Click on 'Advanced Preferences' and select the 'Verification' tab.
3. Under 'When Verifying', choose to use the default, document-specified method for verifying signatures, requesting a prompt when it's not available.
4. Also, make sure that 'Require certificate checking to succeed whenever possible during signature verification' is check-marked. This runs a certificate against a list of revoked certificates as part of the validation process.
5. Click OK when done to return to the 'Preferences' window and then click OK again to exit that window.

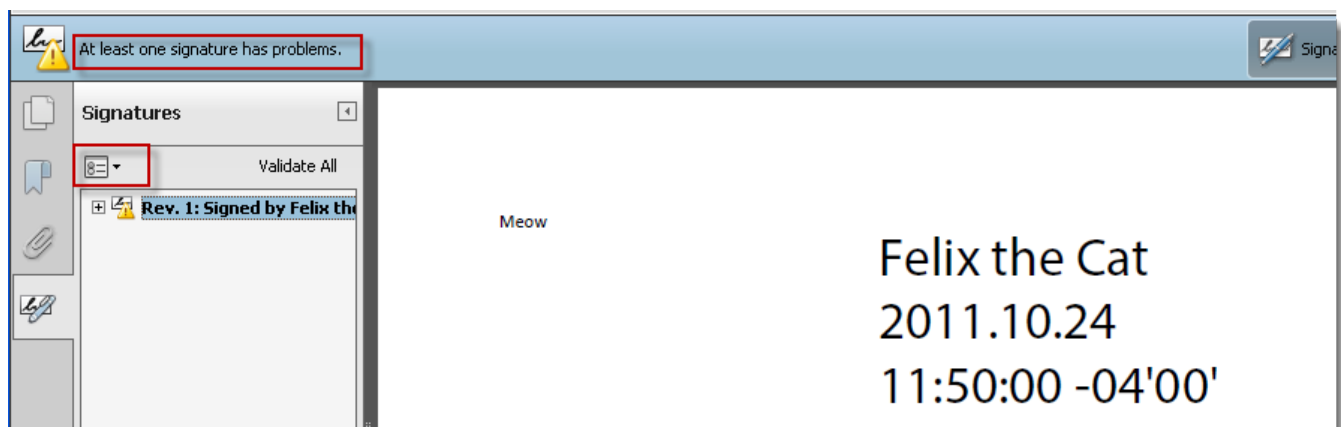


Import a Certificate from a Digital Signature Contained in a .pdf File

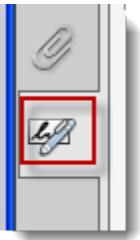
If you have not been sent someone's digital certificate in advance of receiving a signed document from him/her, you can add the certificate to your list of trusted identities by contacting the creator and comparing the certificate details you see to those of the creator's original certificate.

To do so:

1. Open the .pdf file containing the signature.



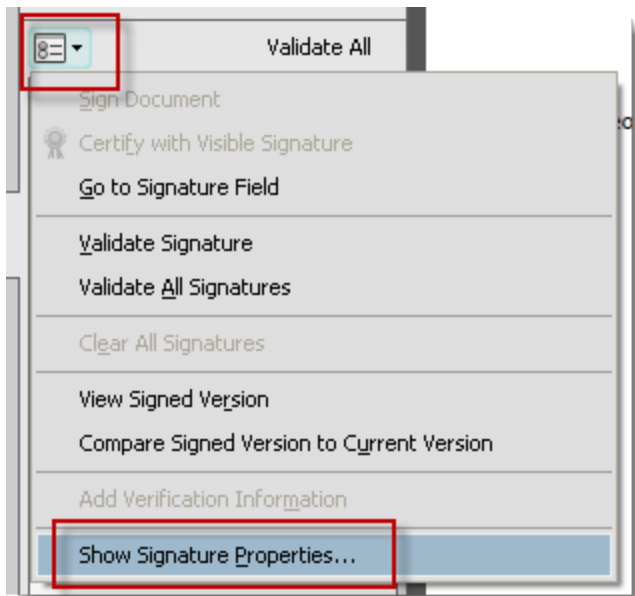
2. Open the signature panel, by clicking on the signature icon.



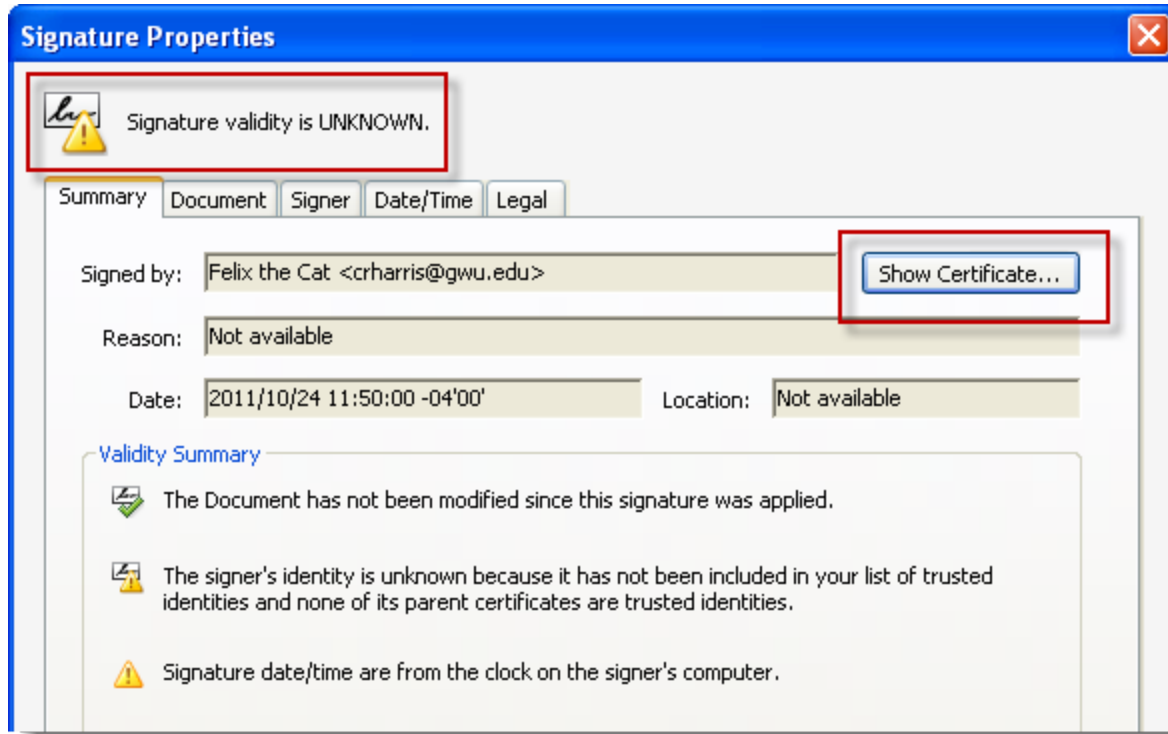
3. Click on the signature whose certificate you are seeking to verify.



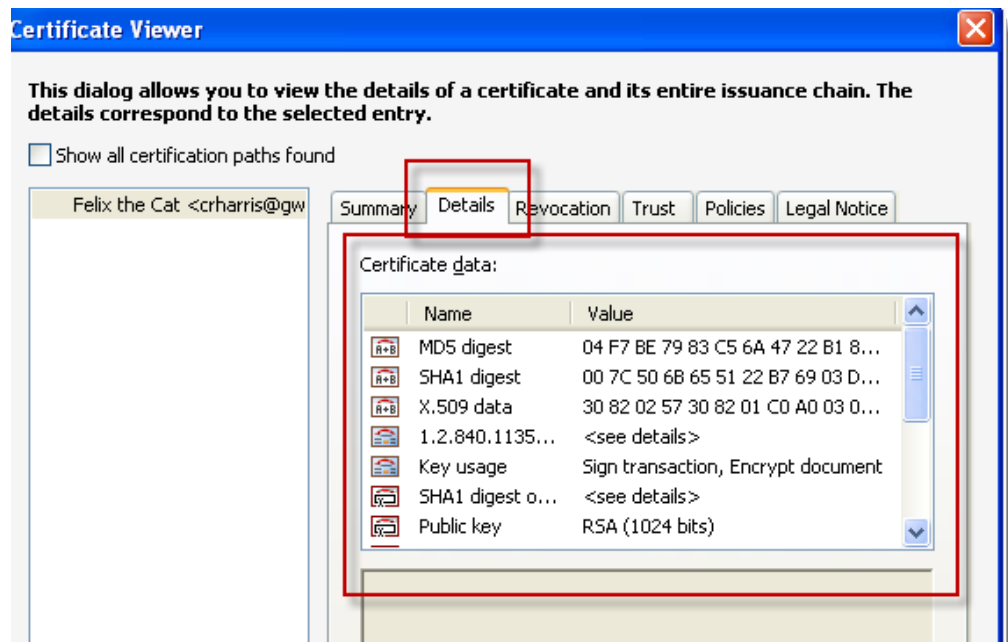
4. In the Options menu directly above, select 'Show Signature Properties'.



5. In the 'Show Signature Properties' window, click on 'Show Certificate'.

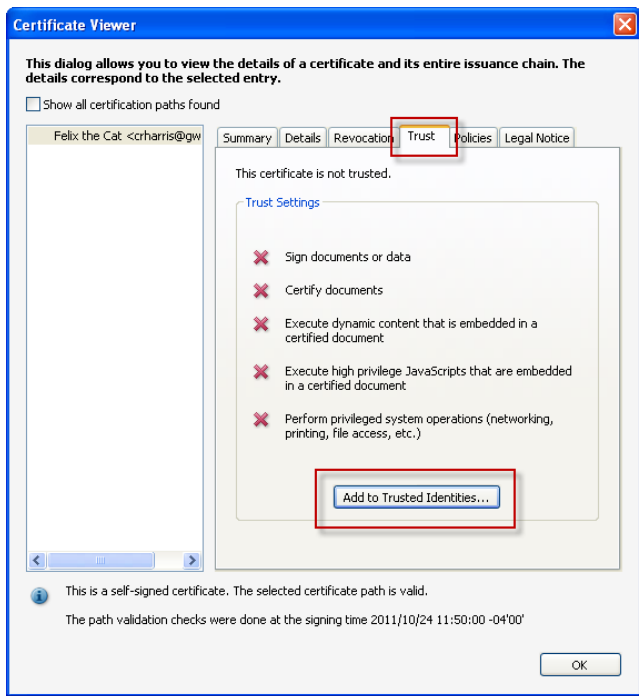


If the certificate is self-signed, contact the creator of the certificate to confirm that the information in the Details tab matches the details in his/her own certificate.



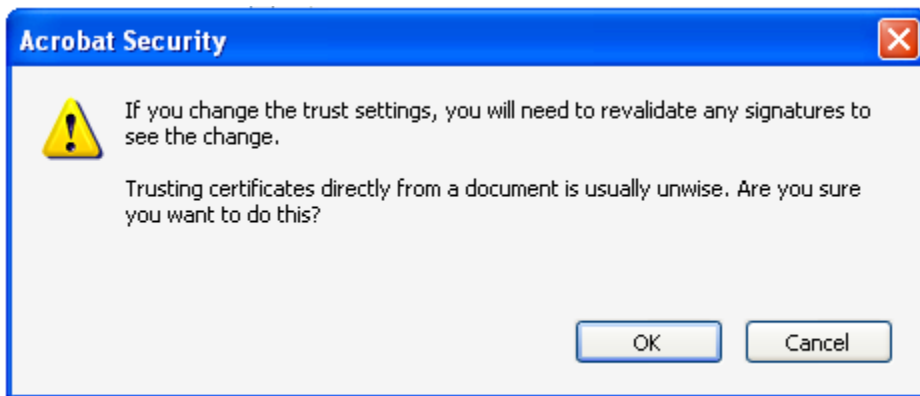
If the information matches,

6. Click the Trust tab, click 'Add to Trusted Identities'.



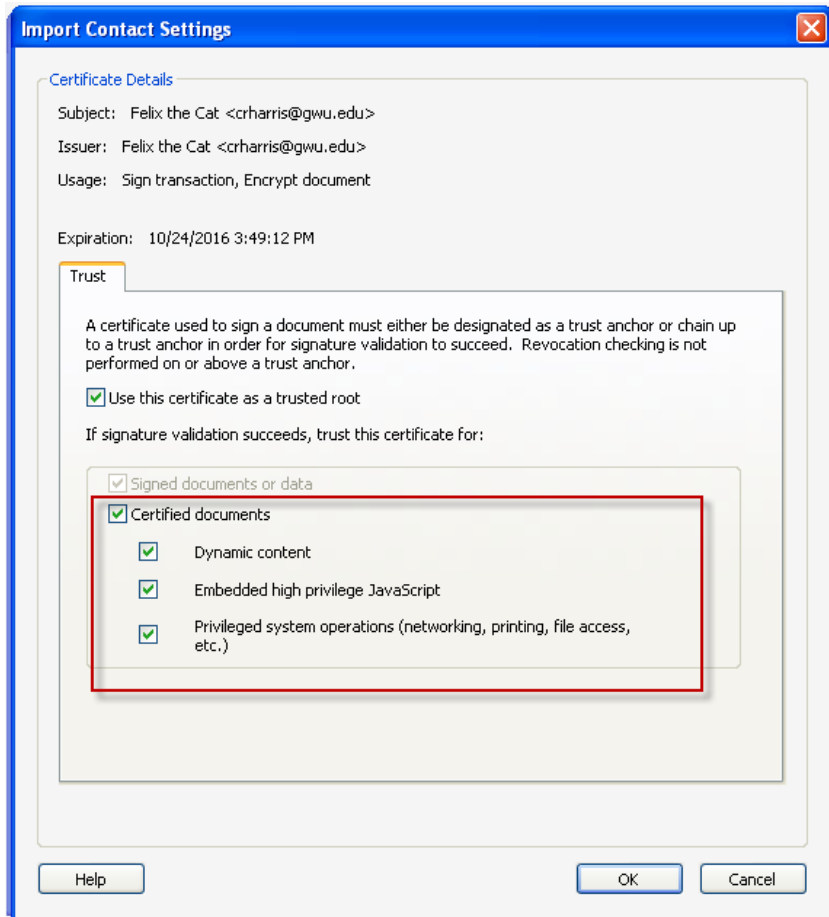
An Acrobat Security message appears. If you trust the sender,

6. Click OK.



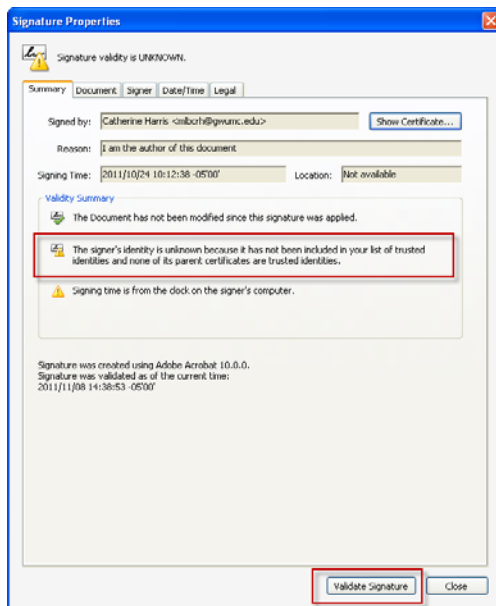
In the 'Import Contact Settings' dialog box,

7. Select your trust options (see options listed in figure below), and click OK.

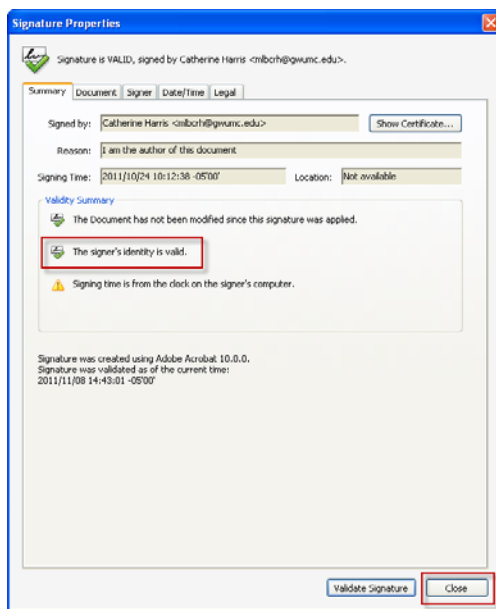


The 'Signature Properties' dialog box still lists the signer's identity as unknown.

8. Click 'Validate Signature' at the bottom of the dialog box.



This validates the signer's identity and you can press 'Close'.



The file you have been sent should now say that the signature is valid.

