Acrobat **Insider** for AEC Professionals
Tips and Tricks for Adobe Acrobat 7.0

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KEEP THEM SAFE.

Control document confidentiality with Adobe Acrobat 7.0

Safe and Secured
Acrobat 7.0 Professional provides versatile, easy-to-use tools to protect important information

by Michael Dakan

What does it mean to keep your Adobe® PDF documents secure? It means that not just *anyone* can open the files. Recipients can make *only* the kinds of changes you allow. And the people you share your documents with will know for certain that you were the one who authored them.

With Adobe Acrobat® 7.0 software, you can apply versatile security options to your documents that ensure the integrity and security of your valuable information. Because different people and organizations have different needs for document security and control, Acrobat 7.0 offers a range of security and document control features, from simple permissions and passwords to authentication, digital signatures, and more advanced options.

Using Security Settings
An easy way to protect an Adobe PDF document is to restrict what recipients can do with a file after they receive it. By changing the file's security settings, you can prevent or allow recipients to:

- Open the file

- Print the file

- Copy text, images, or other content

You can also restrict the kind of changes that can be made to the file. By choosing one of the following options, you can allow:

- No changes

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IN THIS ISSUE
Keep important information more secure with permissions, digital IDs and more

This month's tip:
Using Acrobat to save a Web page can be easier than using your browser

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IN THE NEXT ISSUE
Next month, *Acrobat Insider* will show how Adobe Acrobat 7.0 Professional handles large-format documents with precision.

SUBMIT A TIP
We welcome your tips for AEC-specific uses of Acrobat 7.0 Professional. If we publish your tip, we'll send you a *Cadalyst* t-shirt.*

**REQUEST A TIP**
Have a question about

- Inserting, deleting, or rotating pages only

- Filling in form fields and signing existing signature fields only

- Commenting, filling in form fields, and signing existing signature fields only

- Any change except extracting pages

You can also allow only low-resolution (150 dpi) printing to limit the reuse of graphics and other images in your document.

How to View and Change Security Settings
From the Document menu, select Security and then Show the Security Settings for This Document. The Security Tab of the Document Properties dialog box lists all the restrictions that currently apply to the document. To change these settings, click the Change Settings button to open the Password Security – Settings dialog box. In the Permissions section, check Use a Password to Restrict Printing and Editing of the Document and its Security Settings, type a password, and then select items from the pull-down menu. For instance, to prevent anyone from printing the file, select None in the Printing pull-down menu.

You can also set a password that recipients must enter to open the document. In the same dialog box, check Require a Password to Open This Document and type a password.
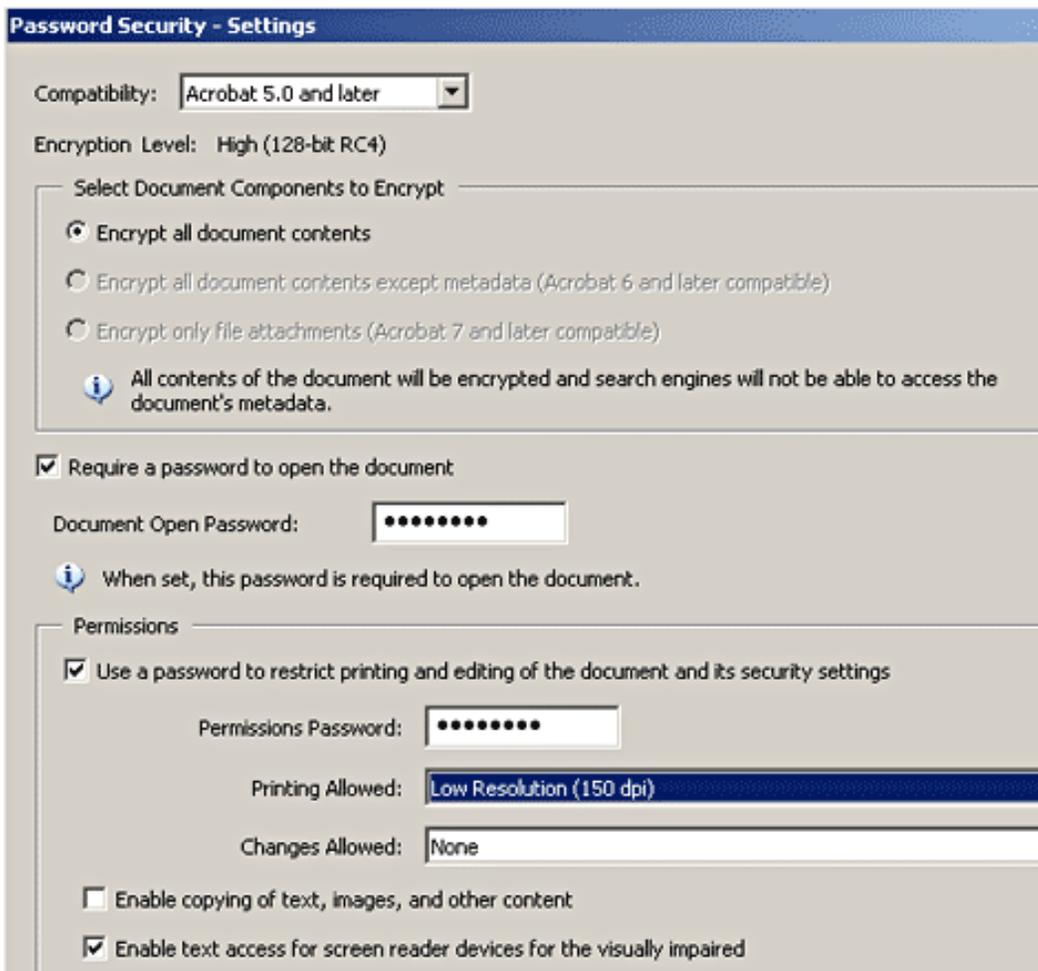
Use the Password Security dialog box to require a password to open the file and to restrict what can be done once the file is open. Here, recipients cannot make

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LEARN MORE
Find out more about how the Adobe Acrobat family of products can streamline processes, improve document security and more at Adobe's AEC Web site or click here to view an OnDemand online presentation.

Download a 30-day trial of Acrobat 7.0 Professional.

[Download]

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NEW!!
Sign up for *Acrobat Insider for Manufacturing*. Get tips and tricks for manufacturing professionals who use the brand-new addition to the Acrobat family, Adobe Acrobat 3D.

changes and can print only low-resolution copies.

Because Acrobat 7.0 gives you the ability to save these settings, you can easily reuse standard company policies without going through the setup process again. To create and save security settings for future use, go to the Document menu and select Security and then Managing Security Policies. This can be a great time saver.
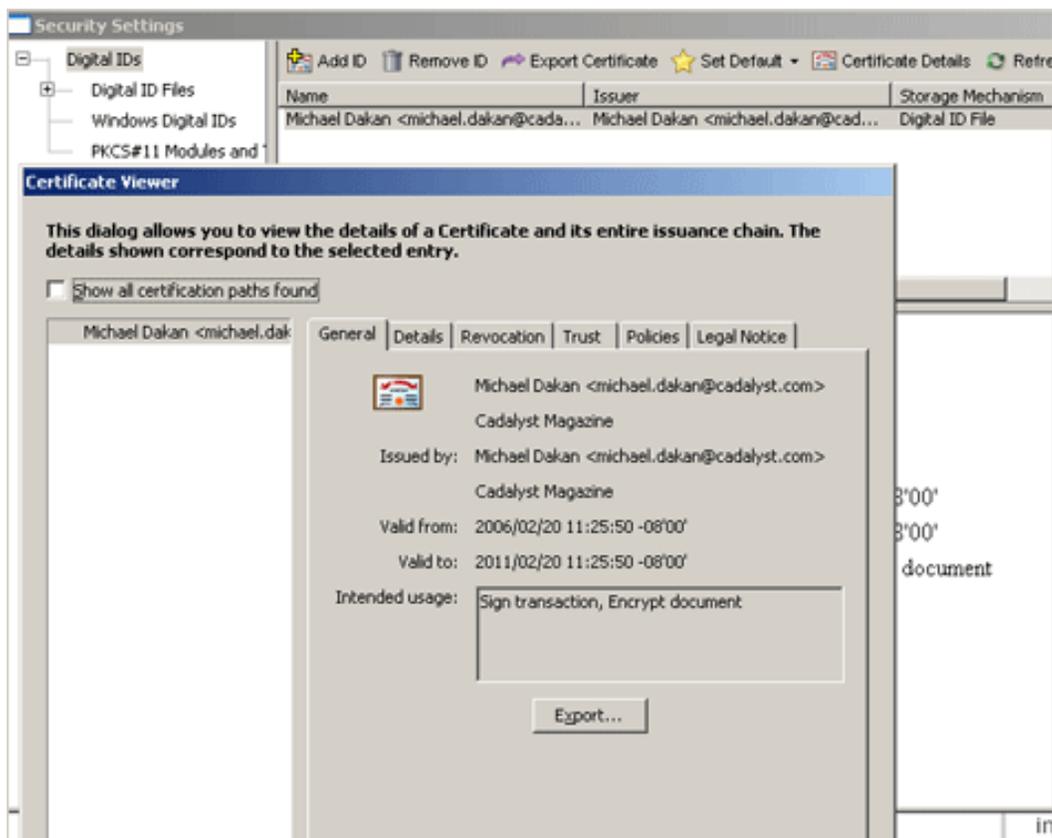
Creating Self-Signed Digital IDs

By using the security settings and passwords, you can protect your document's content and confidentiality. But if you want to prevent someone from forging a document and sending it out in your name, you have to use more advanced security features. By using digital signatures and certifying documents, you enable recipients to verify that it was really you who sent the document and that it has not been altered since it was signed and/or certified.

To sign or certify a document, you need to set up a Digital Identification Certificate, which you can create on your own (called a **"self-signed digital ID"**) or get from a third-party provider (called a **"Certificate Authority"**).

In Acrobat 7.0 Professional, it's easy to set up a self-signed digital ID, which can be a good first step in establishing your official digital identity. This process creates a certificate file (PFX), which you can use for encryption and digital signatures.

1. From the Advanced menu, select Security Settings, and select the Digital IDs tree option in the left pane. Click the Add ID button, then select Create a Self-Signed Digital ID, and click Next.

2. When you're asked how to store the digital ID, select New PKCS#12 Digital ID File, and click Next. (PKCS#12 is a common digital ID file format.)

3. Fill in your personal information, and select Next.

4. In the next dialog box, specify the location where the certificate file will be stored and the file name, as well as the password. When you click Finish, the certificate file (PFX) is created.

The certificate file is your "public key" — that means anyone you give it to will be able to verify your identity and signature and check your document's integrity. For the key to work, you must provide the certificate file to your recipients. You can also provide the file to others who want to create encrypted files to send to you.

Security Settings

Digital IDs

Digital ID Files

Windows Digital IDs

PKCS#11 Modules and

Add ID Remove ID Export Certificate Set Default ▾ Certificate Details Refre

Name	Issuer	Storage Mechanism
Michael Dakan <michael.dakan@cada...	Michael Dakan <michael.dakan@cad...	Digital ID File

Certificate Viewer

This dialog allows you to view the details of a Certificate and its entire issuance chain. The details shown correspond to the selected entry.

☐ Show all certification paths found

Michael Dakan <michael.dak

General | Details | Revocation | Trust | Policies | Legal Notice

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Valid to: 2011/02/20 11:25:50 -08'00'

Intended usage: Sign transaction, Encrypt document

Export...

You can create self-signed digital IDs to assure recipients that your files are authentic. To view the certificate for an ID you've created, double-click the ID in the Security Settings window.

Digital IDs from Certificate Authorities

One disadvantage of a self-signed digital ID is that, like a signature on a paper document, the information it's based on is supplied by you and is not necessarily verified by anyone else. Those viewing your signature have no way of knowing if it is genuine unless they are acquainted with you, have seen your signature previously, and have established a level of trust in the signature.

In contrast, a digital ID issued by a Certificate Authority is verified by a disinterested third-party, which establishes your identity independently and certifies your digital signature to be genuine. Such a digital ID is akin to a notarized signature. To obtain one, you need to meet the vetting requirements of the Certificate Authority (which vary; check the provider's Web site for requirements and costs). The Certificate Authority maintains your Digital ID certificate and makes it publicly accessible, so you don't need to furnish a separate file to recipients to verify your identity, or for encryption encoding and decoding.

Acrobat 7.0 Professional recognizes digital ID certificates from Adobe document security partners and automatically accesses the needed certificates from an online storage facility. For a list of Adobe security partners and Certificate Authorities, visit the Adobe website.

You can establish multiple digital ID certificates for different uses. In addition to a normal digital signature created from a self-signed digital ID certificate, your

company might issue digital IDs for use at work. If you need better assurances of authenticity and identity verification for your recipients, you might also want a digital ID issued by a public Certificate Authority.

Manage Security with Adobe LiveCycle Policy Server

You can greatly expand security options and flexibility by using Adobe LiveCycle™ Policy Server software to manage and control your Adobe PDF files. Without it, you can save an individual security setting locally on your desktop; however, with LiveCycle Policy Server, you can define, deploy, and control corporate-wide policies.

For example, if you use the same security settings repeatedly, you can save them as a policy and apply them to documents with a single click. You can also control access for large groups of users, revoke access to documents, and track how documents are being used (for example, when a recipient has received, opened, or changed the file). For details, search for "Policies" in the Acrobat 7.0 Help file or investigate Adobe LiveCycle Policy Server on the Adobe Web site.

No matter what your security needs are for the Adobe PDF documents you create, you'll find that Adobe Acrobat 7.0 Professional provides flexible tools that make protecting your information easy and worry-free.

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Tips and Tricks

Save a Single Web Page as an Adobe PDF

Most everyone who's worked with Adobe Acrobat is aware that you can capture all the pages in a Web site and combine them into a multi-page Adobe PDF document. (And see *Acrobat Insider #*3 to learn how to combine multiple files in other formats into a single Adobe PDF.) But did you know that you can use Acrobat to save a single Web page? This is especially handy for sending Web pages via email.

If you use the File / Save As command in your browser, the images on the page are saved as separate files in a different folder from the HTML page itself. You have to send all these separate files for your recipient to see the page as it appears on the Web. In addition, to make the images appear correctly, the recipient has to recreate the same folder structure and put the image files in the correct location.

A much easier way is to use the PDFMaker button on your Microsoft Internet Explorer toolbar (added when you install Acrobat), which saves a Web page as a single Adobe PDF file, one that includes all the image files. This makes it much easier for you (you have to send only one file to maintain graphic and text appearance) and for your recipient (no folders to create or image files to move).

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About the Author

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Details and Availability

For a full list of features and system requirements, visit Adobe's Web site. Microsoft® Windows® 2000 with Service Pack 2, Windows XP® Professional or Home Edition, or Windows XP Tablet PC Edition is required for use with Acrobat 7.0. Acrobat 7.0 Professional for Windows, available on CD-ROM or by download, is US$449**.