

ORC ACES  
Subscriber Instructions



# Mobile Code Certificates



## Getting Prepared

*What do I need to have on hand in order to complete the certificate process?*

*Print these instructions for easy reference.*

*(Note: this is a good test to see that you are able to print from your machine. You will need to be able to print the request forms after the on-line registration is submitted.)*

When you apply for your certificates, you must make the request from the **same computer** that you will be using to retrieve the certificate once it is issued.

*You will need to have a FIPS 140-1/2 Level 1 cryptographic compliant web browser (exp: Netscape Navigator and internet Explorer).*

Provide **two forms of photo identification**. One of which must be a valid, current, official government ID such as a passport, driver's license, or government issued photo identity card or badge. The second photo ID can be an official company, or institutional, issued photo identity card or badge (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).

Please provide the following: a **Proof of Organizational Affiliation and Authorization for Code Signing** document and a **CSAA Obligation letter for Business and Government - Federal Certs**.

*You will need to submit these documents on company letterhead, signed by a Duly Authorized Company Representative, stating that you are an employee of that organization.*

*(Sample letters are provided at <http://aces.orc.com/instructions.html>).*

Determine the Form of Payment (Purchase Order (PO), Check, Credit Card (MC, VISA, AMEX)).

*Check the web site <http://aces.orc.com/choose.html> for certificate price information. If your company has a pricing agreement with ORC, make sure to include the appropriate price and funding document on the printed request forms.*

*If paying by credit card, provide the information on the printed request forms. If paying by PO, you will need to have the PO number before sending in your request. Once the PO is placed with ORC, continue with the registration process. Please submit Purchase Orders to:*

Operational Research Consultants, Inc.  
11250 Waples Mill Road  
South Tower, Suite 210  
Fairfax, VA 22030  
Attn: Denise Finnance  
703-246-8530

## Getting Started

Log into the computer that you will use to electronically request and retrieve your digital certificates. Remember, you must use a [FIPS 140-1/2 Level 1](#) cryptographic compliant web browser.

### **Please Note:**

*ORC also recommends, that if you know of a network, operating system, or computer change that will take place from the time you electronically SUBMIT your request (creating your private key on the computer you are using), to when you receive the e-mail please see [Creating an Operational Copy of your Private Key Instructions](#) at [Insert link for to use during the request process](#). For further assistance please contact the help desk at 1-800-816-5548 or 703-246-8536 or [pkihelp@orc.com](mailto:pkihelp@orc.com)*

Go to the ORC ACES web site at <http://ACES.orc.com>

To begin the certificate process, please select either the “Get Certificate” [Green Arrow](#) on the home page, or “Order your Certificate” button on the left menu bar.

*A browser check will be performed without any intervention. If you do not have the correct browser, you will be diverted to a download browser page in which you can download the latest browsers in order to complete the request and use your certificate. If you have the correct browser you will be taken to either the “online Application” process page or to the “Trust the Root” page.*

Read the information describing the “Online Application” process and click [Green Next Arrow](#).

Read the information describing “Identity Verification” and click [Green Next Arrow](#).

Read the information describing the “Secure Online Certificate Delivery” process and click [Green Next Arrow](#).

## Trust the CA

### *Trust the Certificate Authority*

**Please Note:**

Be sure to print the instructions on the "Begin the Registration Process" page for easy reference.

When you come to the "Trust the Certificate Authority" page, please be sure to select the "Trust the CA" **Yellow Button**.

On the "Trust the ORC ACES Certificate Authority" window, **read and print** the instructions.

Select the "Click Here" **Green Button** next to **Step 1. Trust the ORC ACES Root Certificate Authority**.

- ❶ If a "Security Alert" pops up and asks you if you want to continue, click **Yes**.
  - In the "File Download" window, click *Open*
  - Under the "General" tab, in the "Certificate Information" window, click *Install Certificate*
  - In the "Certificate Import Wizard" window, click *Next*
  - In the "Certificate Store" window, click *Next*
  - Click *Finish*
- ❷ If a "Security Warning" window pops up, click **Yes**.
  - In the "The Import was successful" pop up, click *OK*
  - In the "Certificate Information" window, click *OK*
- ❸ If a "File Download" window pops up, click **Save**.
  - Save the "ACES\_root" file to your desktop
  - Open the file from your desktop
  - Under the "General" tab, in the "Certificate Information" window, click *Install Certificate*
  - In the "Certificate Import Wizard" window, click *Next*
  - In the "Certificate Store" window, click *Next*
  - Click *Finish*

Once you have trusted the CA, select the "Click Here" **Green Button** next to **Step 2. to Obtain your Certificate**.

## Code Signing Certificate Request

*Apply for your Code Signing Certificate*

*Read the Notes posted at the top of the "Select a Certificate" page.*

*Note 1: You must first electronically submit your request for an Identity Certificate, prior to requesting an Encryption or Mobile Code Signing Certificate.*

*Note 2: If you are using either Microsoft Windows 2000, 2003 or XP Operating Systems, you may encounter an Undefined Name Constraints Error. For more information and instructions select the link on the page or go to the Instructions tab and scroll down to FAQ Information for the same link.*

In the "Select a Certificate" window, click the type of certificate required (**Business Representative** or **Government - Federal**).

When the "Certificate" window pops up, click the "**Code Signing Certificate**".

On the "Code Signing Certificate Subscriber Agreement (Obligations)" window, you will be required to follow the steps below.

**Step 1. Read the Code Signing Certificate Subscriber Agreement (Obligations)** and agree to comply with these obligations before continuing on with the certificate request process.

**Step 2. Download and complete the Proof of Organization Affiliation and Authorization for Code Signing document.**

**Step 3. Download and complete the CSAA Obligation letter.**

Once you have read and agreed with the Code Signing Certificate Subscriber Agreement (Obligations), click the "**I Agree**" **Red Button**.

Fill in all other fields on this page.

Enter your **full, legal name**. Your name **MUST** match your government issued photo identification (If your driver's license reads "James L. Smith" and your company ID badge reads "Jim Smith", enter "James L. Smith").

Enter your **Company Department Name**. (Enter the name of the Company that pays you, not the facility/customer that you work at/for).

Enter your **Contact Information**. (Enter your company e-mail address (<you@yourcompany.com>) and company phone number.

When you click **SUBMIT**, your **PRIVATE KEY (a file) is sent to your computers hard drive**. ORC recommends, that if you know of a network, operating system, or computer change that will take place from the time you electronically **SUBMIT** your request, to when you receive the e-mail notifying you to retrieve your public key, please see **Creating an Operational Copy of Your Private Key** instructions at <http://aces.orc.com/instructions> under "General Instructions", to use during the request process.

*For further assistance, please contact the help desk at 1-800-816-5548 or 703-246-8536 or [pkihelp@orc.com](mailto:pkihelp@orc.com).*

## Code Signing Certificate Request

Apply for your Code Signing Certificate cont'd

Read the Notes posted at the top of the "Select a Certificate" page.

**Note 1:** You must first electronically submit your request for an Identity Certificate, prior to requesting an Encryption or Mobile Code Signing Certificate.

**Note 2:** If you are using either Microsoft Windows 2000, 2003 or XP Operating Systems, you may encounter an Undefined Name Constraints Error. For more information and instructions select the link on the page or go to the Instructions tab and scroll down to FAQ Information for the same link.

If you are using **Internet Explorer**: Please read the instructions below first then click the **"Submit"** button and follow the instructions.

- 1 You will see a pop up window titled "Potential Scripting Violation" that asks "Do you want to request a certificate now?" Click **Yes**
- 2 In the "Creating a new RSA Exchange Key", click **Set Security Level**
- 3 Set to **"High"**. Click **Next**
- 4 On the next screen:
  - Enter your Name in the "Password for" field  
*Note: If you are using Windows XP, the "Password for" field will read CRYPTO automatically.*
  - Then enter your password in both the "Password" and "Confirm" fields  
*Note: Selecting one password to use each time you are asked for a password will ensure the smoothest process possible. ORC suggests your passwords be compliant with FIPS 112. All passwords are case sensitive and it is suggested that they be a least 8 characters long, and include letters, numbers and characters. If you forget you password, there is no way to recover it and you will need to purchase a new certificate.*
- 5 Then click **Finish**
- 6 Then click **OK**

You should now see your "Request for ORC ACES Code Signing Certificate" form. You must **PRINT** out the entire form (should be 4 pages). You will see a "Finish Line" at the end of the form.

**Note:** **Do not exit this window until you have verified that the form has printed properly.** If you cannot print the form, you cannot continue and you will have to start the process over. (Please call the help desk at 1-800-816-5548 or 703-246-8536, if this occurs before closing down the screens.

After you have obtained a successful print-out, you may click **Continue** at the bottom of the form, which will take you back to "Select a Certificate" window to apply for more ORC ACES Certificates.

If you are not requesting another certificate, you may now exit the ORC web site, or browse for further information.

## Printed Certificate Request Forms

*What you will need  
to fill out the Printed Request Forms*

Once you have completed your on-line registration and printed your Certificate Request Forms, you will need to make sure that you properly complete the forms before taking them to an ORC Registration Authority (RA).

**Note:** Do not sign the printed request forms until in the presence of an RA.

### Provide **two forms of photo Identification.**

One of which must be a valid, current, official government ID such as a passport, driver's license, or government issued photo identity card or badge.

The second photo ID can be an official company, or institutional, issued photo identity card or badge. If you use your company issued photo badge as one of the forms of ID, then that will also fulfill the proof of company affiliation. (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).

**Make copies of both the front and back of the 2 photo ID's and include them when you submit your printed forms.**

Don't forget to **provide proof of organizational (company) affiliation and a CSAA Obligation** letter.

You are required to submit a letter on company letterhead indicating your status as an employee and signed by a duly authorized company representative. A sample letter may be downloaded at <http://aces.orc.com/instructions.html> under "General Instructions".

**DO NOT SIGN THE REQUEST FORMS YET.** The forms must be signed in the presence of a Notary Public, RA or LRA. Complete all the fields, except "Requestor Signature" field, on pages 1 and 4 of the "Request for ORC ACES Mobile Code Signing Certificate" form as follows on the next page.

## Printed Certificate Request Forms

### Filling out the Printed Request Forms

Once you have completed your on-line registration and printed your Certificate Request Forms, you will need to make sure that you properly complete the forms before taking them to a Notary Public, an ORC Registration Authority (RA), or a Local Registration Authority (LRA).

**Note:** Do not sign the printed request forms until in the presence of a Notary, RA or LRA.

#### 1 First Page:

- Read the instructions and note the address where you will need to send your original documents and copies of 2 photo IDs.

#### 2 Second Page:

- **Read the Code Signing Certificate Subscriber Agreement (Obligations).** These are the same obligations you saw in the electronic registration process. By signing these forms you are again agreeing to comply with these obligations.
- **Requestor Name:** Fill in your full legal name (Last, First, MI).  
*Complete last name, full first name and your middle initial.*
- **Requestor Signature and Date:** Leave these blank until you are in front of a Notary Public, RA or LRA.
- **Organization:** Enter "Your Company's Name".
- **"1) Photo ID Type":** Enter the first type of photo ID you are submitting (exp: <State> Driver's License", "US Passport", etc.).
- **1) Photo ID #":** Enter the ID number for the ID type you are submitting. (exp: For a driver's license, enter your driver's license number).
- **2) Photo ID Type":** Enter the type of photo ID you are submitting. (exp: Enter "<Company name> employee badge"). (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).
- **2) Photo ID #":** Enter the ID number for the ID type you are submitting. (exp: Enter your employee badge number).

#### 3 Third Page:

- **Determine the Form of Payment.** ORC accepts VISA, MasterCard, American Express, Purchase Orders or Checks (payable to ORC, Inc.)

- **Credit Card Purchases:**

*Circle the card type you are using*

*Complete the [Card Holder Name](#), [Card Number](#), [Expiration Date](#) and [Billing Address](#)*

## Printed Certificate Request Forms

### Filling out the Printed Request Forms cont'd

Once you have completed your on-line registration and printed your Certificate Request Forms, you will need to make sure that you properly complete the forms before taking them to a Notary Public, an ORC Registration Authority (RA), or a Local Registration Authority (LRA).

**Note:** Do not sign the printed request forms until in the presence of a Notary, RA or LRA.

#### 3 Third Page:

- **Purchase Orders (PO):**

*Purchase Order Number: Enter Company PO number, or ORC Invoice number. Include your company name before the PO number.*

*Purchase Orders need to be in place with ORC before you complete the certificate process. Some POs have invoices against them that you will need to reference. See your company representative for this information.*

- **Checks:**

*In the "Purchase Order Number" block fill in reference that you are paying by check and submit the check along with your completed forms.*

#### 4 Fourth Page:

- **Requestor Name:** Fill in you full legal name - full first name, middle initial and complete last name.
- **Requestor Signature and Date:** Leave these blank until you are in front of a Notary Public, RA or LRA.
- **Notary/RA/LRA Name, Notary/RA/LRA Signature, and Date** must be completed by a Notary Public, an ORC RA or an authorized LRA. The **Date of Commision** must be completed by the Notary and the **box** to the left is for the Notary seal.

*The Notary, RA and LRA are witnessing your signature. In addition, the RA and LRA are required to make sure that everything you have filled out is accurate and check to make sure that you are an employee of your company.*

## Identity Verification

**Please present the following to a Notary Public for notarization, an ORC Registration Authority (RA) or to a Local Registration Authority (LRA) for approval.**

Unsigned Certificate Request Forms (4 pages each).

Your 2 original photo IDs. (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).

Completed and Signed Proof of Organizational Affiliation and Authorization for Code Signing document and CSAA Obligation letter. Sample letters may be downloaded at <http://aces.orc.com/instructions.html> under General Instructions.

**Notary Public** - After the Notary witnesses your signature, you will need to mail the following to an ORC RA:

Signed and notarized Certificate Request Forms for each certificate requested (4 pages each).

Copies (front and back) of your 2 photo ID's. (ORC does not accept photo IDs from Retail Businesses, such as Costco, Sam's Club, etc.).

Completed and Signed Proof of Organizational Affiliation and Authorization for Code Signing document and Acknowledgement of Responsibilities form. A sample letter may be downloaded at <http://aces.orc.com/instructions.html> under General Instructions.

Operational Research Consultants, Inc. - ACES  
11250 Waples Mill Road  
South Tower, Suite 210  
Fairfax, VA 22030  
(703)246-8568

**ORC Registration Authority (RA)** - You must present your certificate Request Forms in person to an ORC RA. The RA Will verify your identity and witness your signing of the forms. The RA will keep the **original paperwork and photocopies (front and back) of your 2 photo IDs** for processing and secure archiving. You may present to an ORC RA at the following ORC locations:

11250 Waples Mill Road  
South Tower, Suite 210  
Fairfax, VA 22030  
(703)246-8568

1625 Prince Street  
Suite 350  
Alexandria, VA 22314  
(703)535-5312

*We recommend you call and make an appointment before visiting, to ensure an RA is available when you arrive.*

## Identity Verification cont'd

**Note:** We recommend you call and make an appointment before visiting, to ensure an RA is available when you arrive.

**Local Registration Authorities (LRA)** - Some companies use LRAs through arrangements with ORC. You will probably have been told if your company has one or more ORC authorized LRAs, if you want to verify that your company has trained LRAs, please contact the ORC Helpdesk at 1-800-816-5548 or 703-246-8536. If your company has an ACES LRA that approves your forms, then they will keep the original paperwork and photocopies (front and back) of your 2 photo IDs for processing and secure archiving, and send a signed e-mail to the ACES RA with your pertinent data for approval and issuance by the ORC Issuing Authority (IA).

## Certificate Issuance, Acceptance and Acknowledgement

**Note:** When you apply for your certificates, you must make the request from the same computer that you will be using to retrieve the certificate once it is Issued.

**Issuance** - Upon successful completion of the identification and authentication process, you will receive an e-mail from the ORC ACES IA notifying you that your certificate has been issued and providing you with a URL where you will be able to pick-up your certificate.

**Acceptance** - To accept the certificate, click on the link that was provided in the email to access the certificate retrieval page. You must indicate acceptance or rejection of the ACES Certificate to the ORC CA within 30 calendar days of receiving notification. By accepting the ACES Certificate, you are warranting that all information and representations made and included in the ACES Certificate are true. The acceptance agreement shall include the subscriber obligations.

**Acknowledgement** - Print a copy of the email notification, sign it, and mail the signed document to the ORC ECA CAA (Certificate Authority Administrator).

**Important Note:** If you do not provide this verification notice, or if you are found to have acted in a manner counter to these obligations, the Certificate shall be revoked, and you will forfeit all claims against the ORC ACES CA infrastructure in the event of a dispute arising from failure to fulfill the obligations above.

ORC suggests that you export an operational copy of your certificate to a disc or CD as a precaution against hard drive failures, or network changes. Please be sure that you are in compliance with the subscriber obligations when storing your certificate.

## ORC User Help

Contact the **Help Desk at 1-800-816-5548 or 703-246-8526**, 7:30 AM to 7:30 PM Eastern Standard Time or e-mail **[pkihelp@orc.com](mailto:pkihelp@orc.com)**.

Additional Instructions (such as exporting you certificate), as well as, the latest OS fixes, are available at <http://aces.orc.com>, under Instructions.

*Our Help Desk is online 24 x 7 or you can speak to an ORC Service Representative from 7:30 am to 7:30 pm (Eastern Time).*