Requesting a certificate using Certificate Management

Introduction

An electronic certificate is installed on each ePharmacy system that sends messages to the ePharmacy message store. The certificate is required to ensure security across the ePharmacy infrastructure. It does two jobs: it ensures that messages are encrypted and secure as they are transmitted electronically, and it ensures that only authorised systems can send messages. Certificates are currently installed on your system – they were installed by your PMR/PMS supplier.

To ensure continued security, the certificates periodically require renewal. To make this a simple process, your PMR/PMS supplier has installed Certificate Manager on your system. Please remember that your PMR/PMS suppliers only have responsibility for installing the tool. Any support on the tool can be provided via the PSD helpdesk on 0131 275 6600.

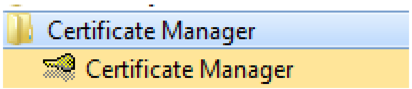
The certificate renewal process requires you to know your EPOC number and a PIN which will be sent to you in a letter similar to your bank PIN letters. The PSD helpdesk can provide you with your EPOC number if you don't already know it. When you receive your PIN letter, you will have two weeks to request and download the certificate. If this is not done in time, there is a risk that your current certificate will expire and you will be unable to send electronic messages to the ePharmacy message store.

After receiving your letter, follow the instructions below to request and install your certificate. The certificate request should be made by a person who is logged in with Administrator Privileges on the local machine.

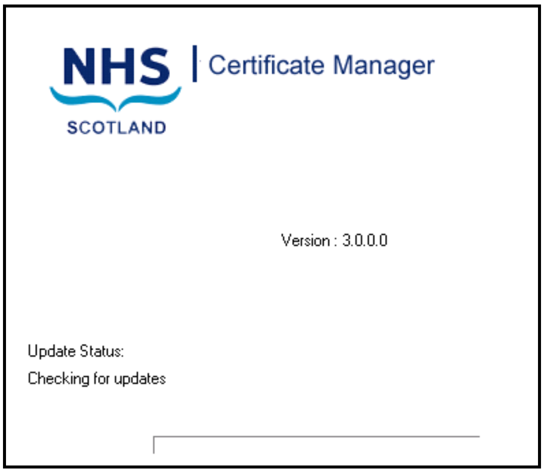
Starting the Certificate Manager

On the Windows 'Start' menu select

All Programs -> Certificate Manager -> Certificate Manager



The following splash screen will appear, and the Certificate Manager updater will attempt to contact the Certificate Management Web Service.



Version : 3.0.0.0

Update Status:
Checking for updates

If, for any reason the Certificate Manager Updater cannot contact the Certificate Management Web Service, an error message will be displayed. Otherwise, the Certificate Manager Updater will begin checking for any available Root Certificates.

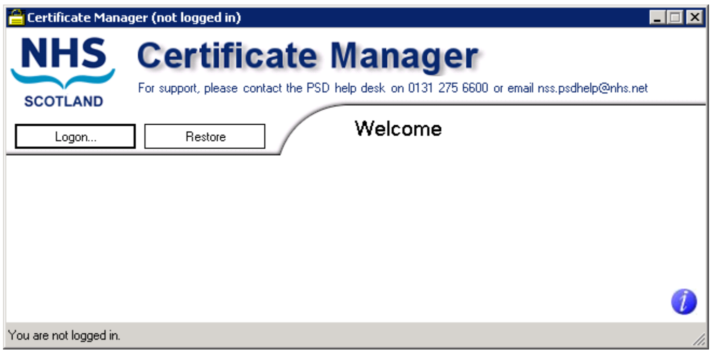
Update Status – Checking for updates

At launch, the Certificate Manager application checks the Certificate Management Web Service for available updates for New CA Root Certificates.

Should any updates be available, information detailing the type of update and the available user options regarding the update will be displayed.

The Welcome screen

Once Certificate Manager has started, the following Windows dialog box is displayed.



Certificate Manager (not logged in)

Certificate Manager

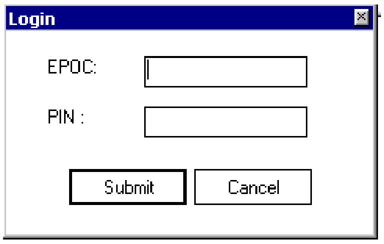
For support, please contact the PSD help desk on 0131 275 6600 or email nss.psdhelp@nhs.net

Welcome

You are not logged in.

Logging In

Click on the **Logon** button on the Welcome Screen.
The following Windows Dialog is displayed.



Type your EPOC number and the associated PIN into the appropriate boxes.

Click on the ‘**Submit**’ button.

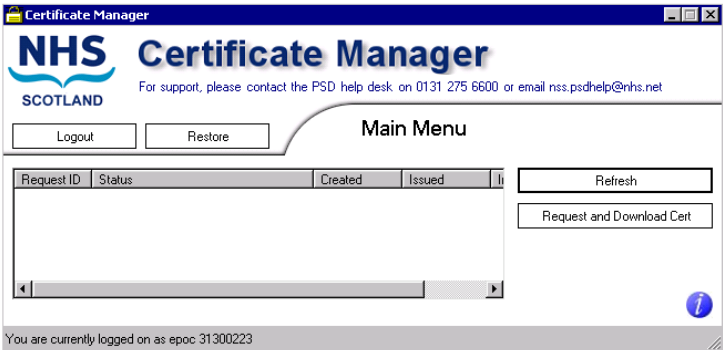
If the EPOC and PIN are valid, the Logon successful dialog box will be displayed.

Click **OK**.

The main Certificate Manager application screen is displayed.

Certificate Manager Main Menu screen

The Main Menu screen allows users to manage and review Certificate Requests.



For support, please contact the PSD help desk on 0131 275 6600 or email nss.psdhelp@nhs.net

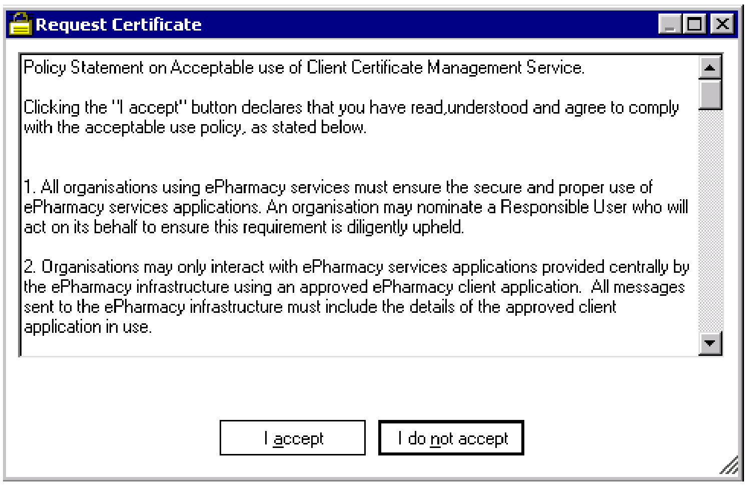
You are currently logged on as epoc 31300223

The status pane of provides details of each request that has been submitted.

Creating a Certificate Request

Requesting a Certificate

Click on the '**Request Cert**' button. The following Dialog Box will appear.



Policy Statement on Acceptable use of Client Certificate Management Service.

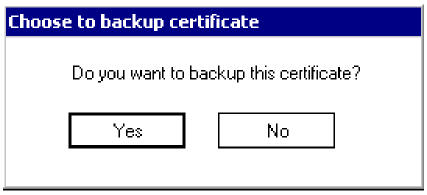
Clicking the "I accept" button declares that you have read,understood and agree to comply with the acceptable use policy, as stated below.

1. All organisations using ePharmacy services must ensure the secure and proper use of ePharmacy services applications. An organisation may nominate a Responsible User who will act on its behalf to ensure this requirement is diligently upheld.

2. Organisations may only interact with ePharmacy services applications provided centrally by the ePharmacy infrastructure using an approved ePharmacy client application. All messages sent to the ePharmacy infrastructure must include the details of the approved client application in use.

Click on the '**I accept**' button.

Next the 'Chose to Backup Certificate' Dialog is then displayed.



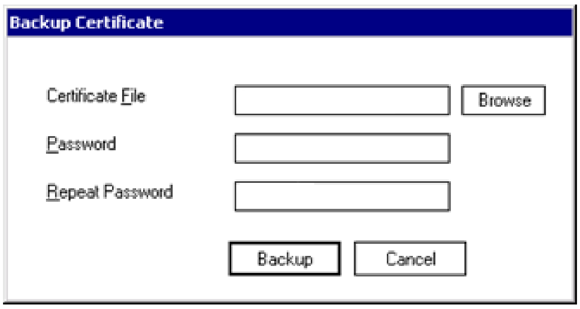
Do you want to backup this certificate?

Click ‘**No**’ and the Certificate Request is submitted.

Click ‘**Yes**’ then continue to Backing up certificate.

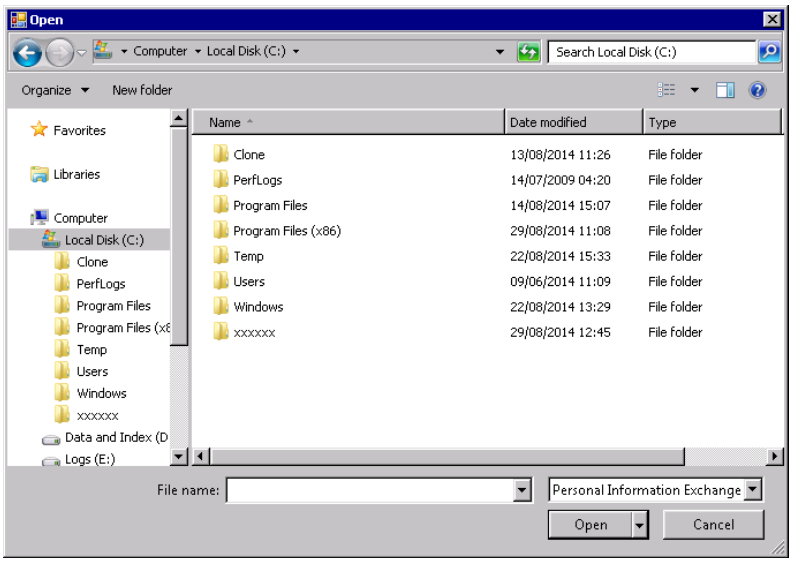
Backing up a Certificate

If Backup Certificate has been selected the ‘Backup Certificate’ dialog box will be displayed, as follows.



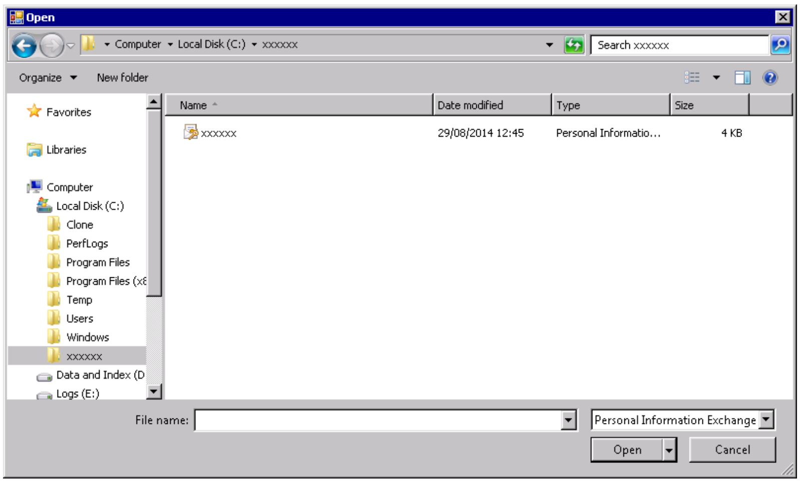
Selecting the Certificate File Location

Click on the ‘Browse’ button. A windows ‘Open’ dialog box will appear. Use the ‘Look in’ drop down control to browse to an appropriate location to save the backup file to, as shown in the following diagram.



Name	Date modified	Type
Clone	13/08/2014 11:26	File folder
PerfLogs	14/07/2009 04:20	File folder
Program Files	14/08/2014 15:07	File folder
Program Files (x86)	29/08/2014 11:08	File folder
Temp	22/08/2014 15:33	File folder
Users	09/06/2014 11:09	File folder
Windows	22/08/2014 13:29	File folder
xxxxxx	29/08/2014 12:45	File folder

Enter an appropriate name for the file in the ‘File name’ box. The application will automatically add the ‘.pfx’ file extension- See below.

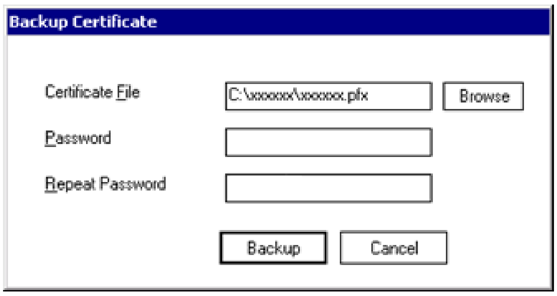


Name	Date modified	Type	Size
xxxxxx	29/08/2014 12:45	Personal Informatio...	4 KB

File name:

Personal Information Exchange

Click on the ‘**Open**’ button to set the path and filename for the certificate backup File. The ‘Backup Certificate’ dialog box will reappear, with confirmation of the path and filename in the *‘Certificate File’* text box.



Certificate File C:\xxxxxx\xxxxxx.pfx

Password

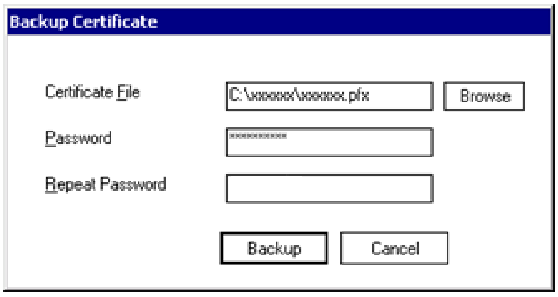
Repeat Password

Enter a suitable password in the *‘Password’* text box.

Note – The password must

- Be more than six characters long.

- Contain
  at least one upper case character (A, B, C …X, Y, Z),
  at least one lower case character (a, b, c … x, y, z), and
  at least one numeric character (0, 1, 2, … 7, 8, 9).



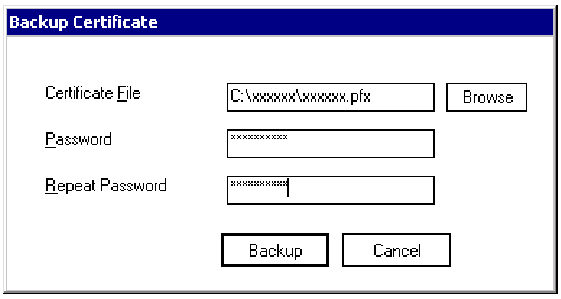
Certificate File C:\xxxxxx\xxxxxx.pfx

Password ***********

Repeat Password

As confirmation, type exactly the same password in the *‘Repeat Password’* textbox.

Note: Safe and secure storage of the password is entirely the responsibility of the User. The password is not stored elsewhere in the application and so cannot be recovered. The certificate cannot be restored from this backup file without the password.



Certificate File: C:\xxxxxx\xxxxxx.pfx

Password: **********

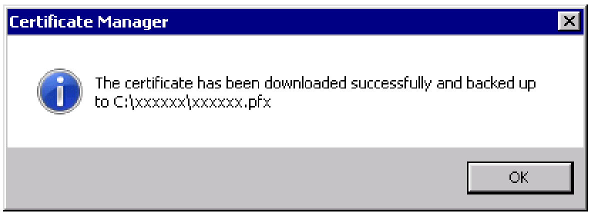
Repeat Password: **********

Click ‘**Backup**’ and the Certificate Request will be submitted.

CA Response to a Certificate Request

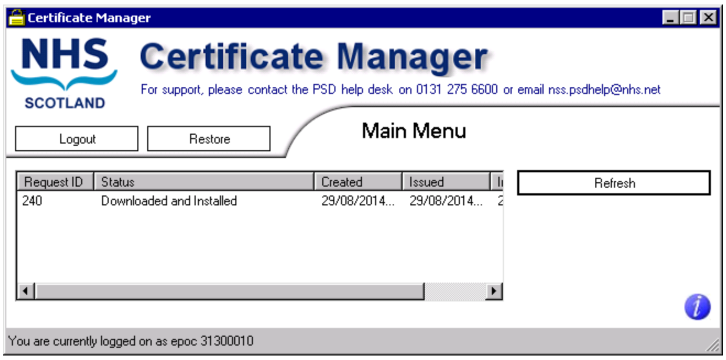
Certificate Request Authorised

Once a Certificate Request has been authorised by the CA and if the user had chosen to Back up the certificate the following dialog will be displayed



The certificate has been downloaded successfully and backed up to C:\xxxxxx\xxxxxx.pfx

The certificate will be downloaded and installed. The status pane of the Main Menu window will be updated as shown below.



Certificate Manager

For support, please contact the PSD help desk on 0131 275 6600 or email nss.psdhelp@nhs.net

Main Menu

Request ID	Status	Created	Issued	I
240	Downloaded and Installed	29/08/2014...	29/08/2014...	2

You are currently logged on as epoc 31300010

Certificate Request denied

In certain circumstances, a Certificate Request may not be authorised by the CA. If this is the case, it will appear in the Status pane of the Main Menu window with a status of ‘Denied’.

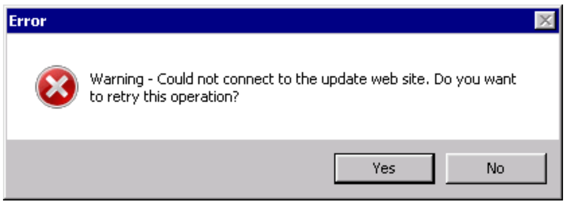
Should a request be denied, users should contact the PSD helpdesk to resolve the situation.

Error Messages

Certificate Management Web Service unavailable

Context:

If, when the Certificate Manager Application is launched, the Certificate Manager Updater cannot contact the Certificate Management Web Server, the following Windows dialog will be displayed.



Error

Warning - Could not connect to the update web site. Do you want to retry this operation?

Possible causes

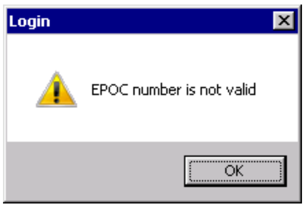
Error	***Cause***	***Resolution***
Network connection problem	Network problem or slow network connection temporarily restricting access to the Certificate Management Web Service.	Click on the Yes button to attempt to re-connect to the Certificate Management Web Service. If the error re-occurs, contact your system administrator/ISP.
Web Service is not available	Network connection and/or Certificate Management Web Service unavailable to Certificate Manager Client Application.	Click on the No button to skip checking for updates from the Certificate Management Web Service and continue using the currently installed version of the Certificate Manager Client Application and Certificates. The application will proceed to the Welcome Screen – see section The Welcome screen.
Web Service offline.	Certificate Management Web Service is offline or otherwise unavailable.	Contact PSD helpdesk for Certificate Management Web Service status.

Log On Failure

Invalid EPOC

Context

The EPOC number entered into the login screen (section Logging In) has not been accepted, resulting in the following Windows dialog being displayed.


Login

EPOC number is not valid

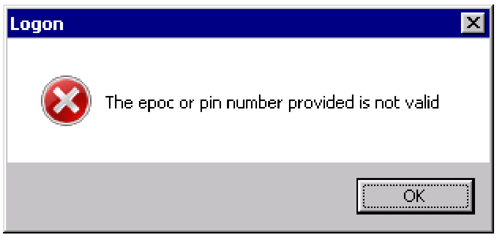
Possible causes

Error	*Cause*	*Resolution*
Data entry error	The EPOC number was incorrectly entered into the Login dialog.	Click on the ‘OK’ button to return to the login screen and to re-enter the EPOC number.
Invalid EPOC error	The EPOC does not exist within the Certificate Management system, or the EPOC has expired, or the EPOC has been locked.	Check that the EPOC number is correct as detailed in the supplied Certificate Manager documentation. If the EPOC number previously entered does not match the number on the documentation, click on the ‘OK button to return to the Login screen and enter the correct EPOC number. If the EPOC entered does match the documentation, but is not accepted, contact the PSD Helpdesk to have the EPOC included/ s. Otherwise, contact the PSD Helpdesk for further assistance.

The EPOC or pin number is not valid

Context

The EPOC number entered into the login screen (section Logging In) has not been accepted, resulting in the following Windows dialog being displayed.


Logon

The epoc or pin number provided is not valid

Possible causes

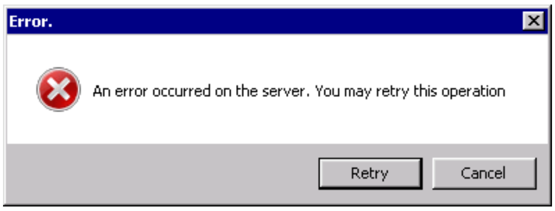
Error	*Cause*	*Resolution*
Data entry error	The PIN number was incorrectly entered into the Login dialog.	Click on the ‘OK’ button to return to the login screen and to re-enter the PIN number.
PIN does not match EPOC	PIN and EPOC are valid	A PIN is only valid for a single EPOC. Contact the PSD Helpdesk for further.

	individually but are not together.	
PIN is Invalid	The PIN does not exist within the Certificate Management system, or the PIN has been locked.	Check that the PIN number is correct as detailed in the supplied Certificate Manager documentation. If the PIN number previously entered is not the PIN number on the documentation, click on the ‘OK button to return to the Login screen and enter the correct PIN number. If the PIN entered does match the documentation, but is not accepted, contact the PSD Helpdesk to have the PIN included. Otherwise, contact the PSD Helpdesk for further assistance.

Network error

Context

While a User is attempting to complete an action accessing the Certificate Management Web Server, the following dialog box is displayed.


Error.

An error occurred on the server. You may retry this operation

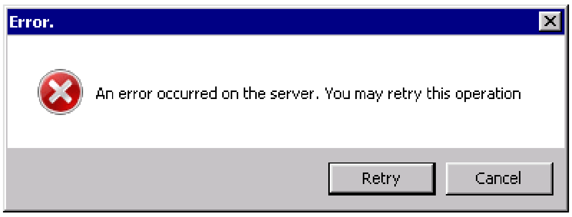
Possible causes

Error	***Cause***	***Resolution***
Network unavailable.	Momentary network failure/slow network connection.	Press Retry.
Network unavailable.	More permanent network failure.	Press Cancel. Contact the System Administrator/ISP who supports the Users system.

Server Error

Context

While a User is attempting to complete an action accessing the Certificate Management Web Server, the following dialog box is displayed.


Error.

An error occurred on the server. You may retry this operation

Possible causes

Error	***Cause***	***Resolution***
Process execution failure.	Failure within the Certificate Management Web Service	Press Retry. If the error persists, contact the PSD help desk with details of the circumstances at the time the error occurred.