

e-SPA

Installation

Guide

October 3, 2002

Version 2.0

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Introduction

CKM Desktop suites contains a variety of programs built on TecSec[®], Incorporated's Constructive Key Management[®] (CKM[®]) technology. These products include *CKM[®]file* and *CKM[®]tokens*.

CKMfile is the file encryption utility of the *CKM Desktop* suite. *CKMfile* is used for file encryption and decryption, electronically signing, verification and secure deletion. To use *CKMfile*, you must obtain a Token from your administrator, register the Token using *CKMtokens* and be enrolled in a Domain.

A *CKM Token* is a storage device for a member's Credentials and Certificates. You will receive your Token (as well as the Password for your Token) from the CMS Central Office e-SPA Administrator.

System Requirements

- Pentium II or higher microprocessor (or equivalent)
- 100 MB of free disk space (50 MB for the application and 50MB for the CKM Desktop)
- 64 MB of RAM for Microsoft[®] Windows[®] 98 Second Edition (SE)/ Microsoft[®] Windows Millennium Edition (ME)
- 128 MB of RAM for Microsoft[®] Windows NT[®], Microsoft[®] Windows[®] 2000
- Operating Systems:
 - Microsoft[®] Windows XP Professional , or
 - Microsoft[®] Windows[®] 2000 Professional with Service Pack (SP) 1+, or
 - Microsoft[®] Windows[®] 2000 Server with SP 1+, or
 - Microsoft[®] Windows 2000[®] Advanced Server with SP 1+, or
 - Microsoft[®] Windows NT[®] Workstation 4.0 with SP 6+, or
 - Microsoft[®] Windows NT[®] Server 4.0 with SP 6+, or
 - Microsoft Windows 98 SE, or
 - Microsoft Windows ME
- CD ROM drive

Please Note: You must be an administrator on your machine to install the *CKM Desktop*.

Please Note: For specific hardware requirements, please see Microsoft's requirements for each operating system.

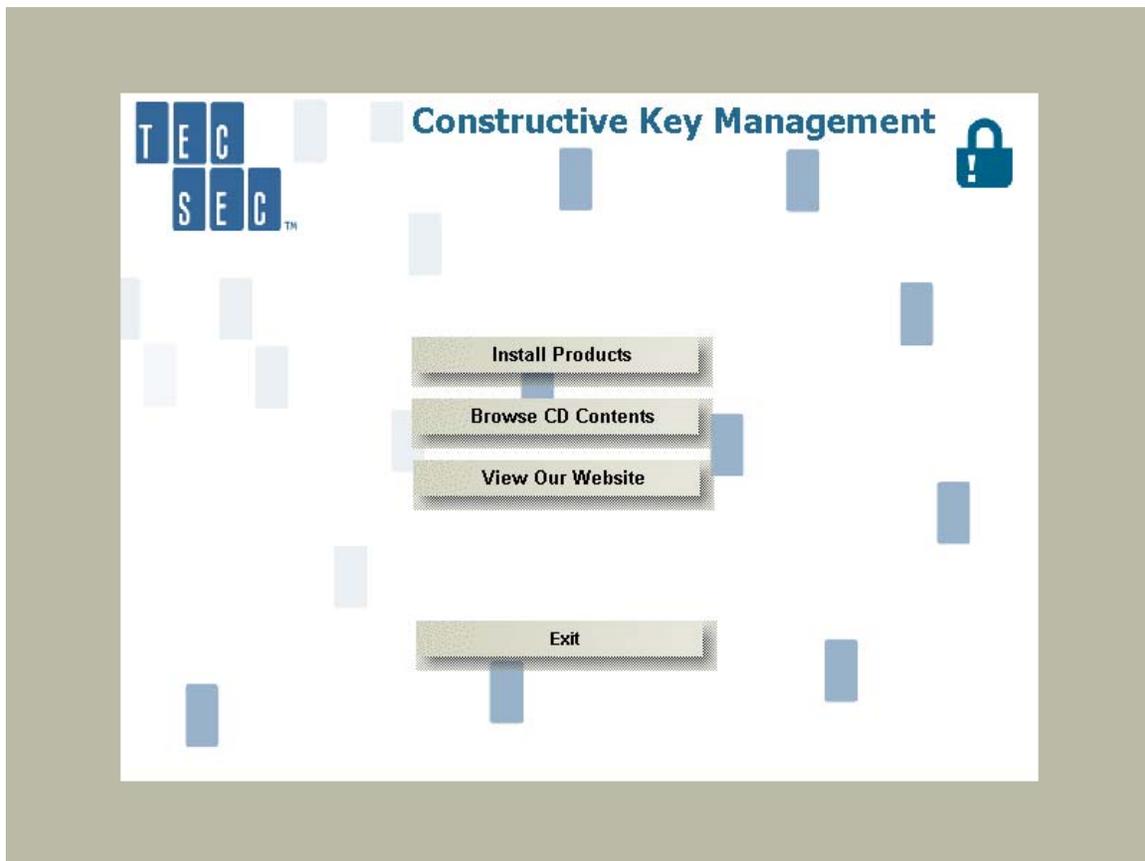
Begin Installation Process

The *CKM Desktop* should be installed on the hard drive of your workstation. It should not be installed on a Local Area Network (LAN) drive. However, the workstation may be connected to a LAN. The use of the software must be restricted to a single user.

To begin, place the CD labeled *CKM Desktop V1.01* into the CD ROM drive.

The TecSec Constructive Key Management main menu will be displayed.

Please Note: If the TecSec Constructive Key Management Main Menu does not automatically come up, from the **Start** menu select **Run...** Type **D:\Launch.exe**. (where D:\ is the drive of your CD ROM drive).

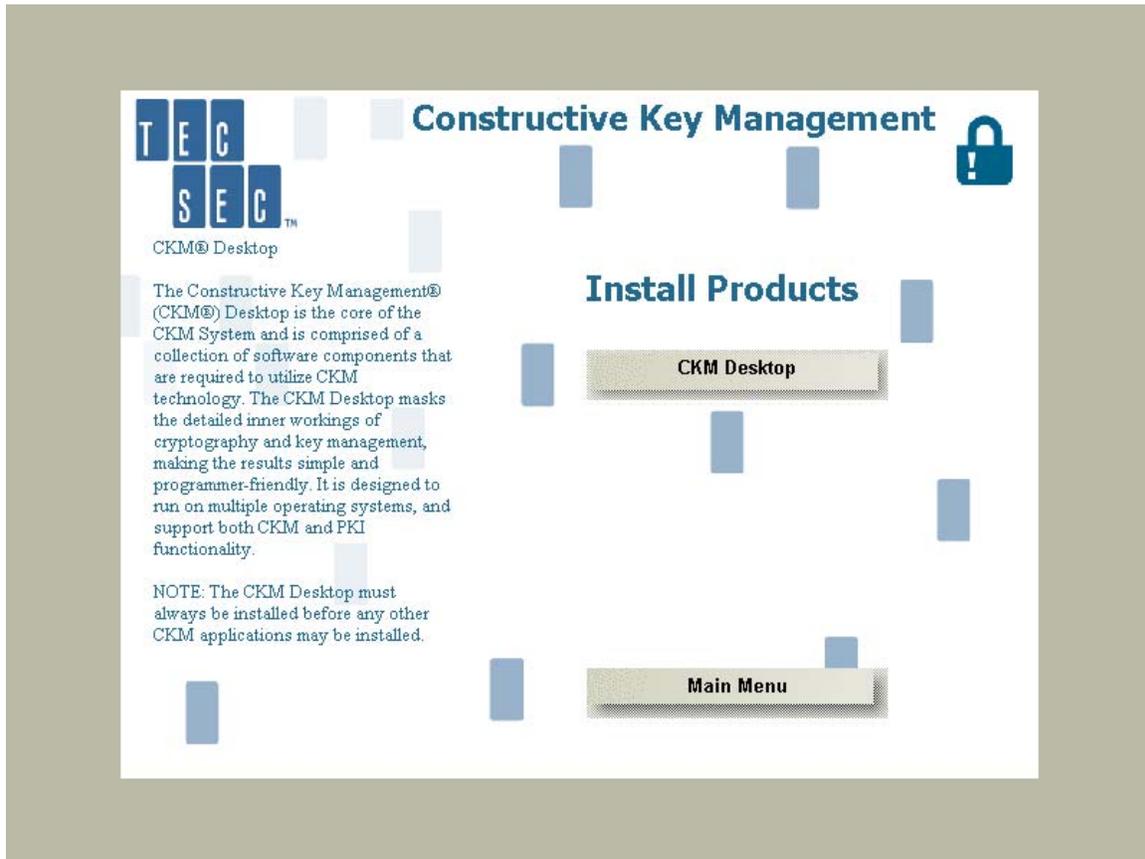


Please Note: It is recommended that you close all other applications prior to installing CKM products.

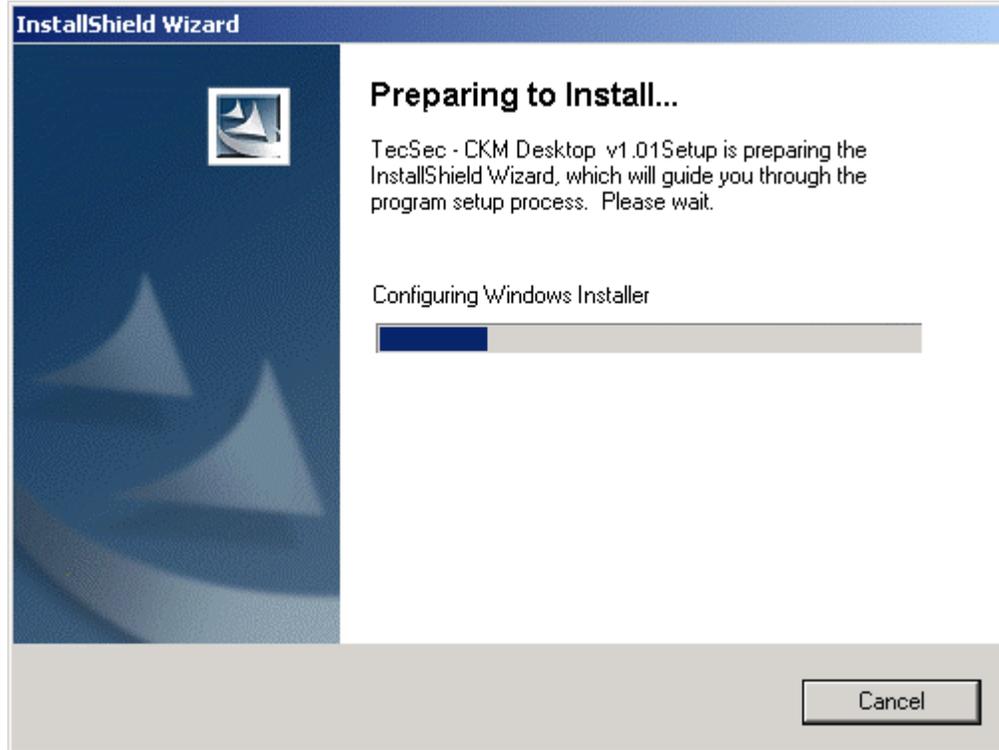
Installation of CKM[®] Desktop

From the TecSec Constructive Key Management main menu, click the “**Install Products**” button. The Install Products menu will be displayed.

From the menu, shown below, choose the “**CKM Desktop**” button.



Once the *CKM Desktop* button is selected, the **InstallShield Wizard** window will appear.



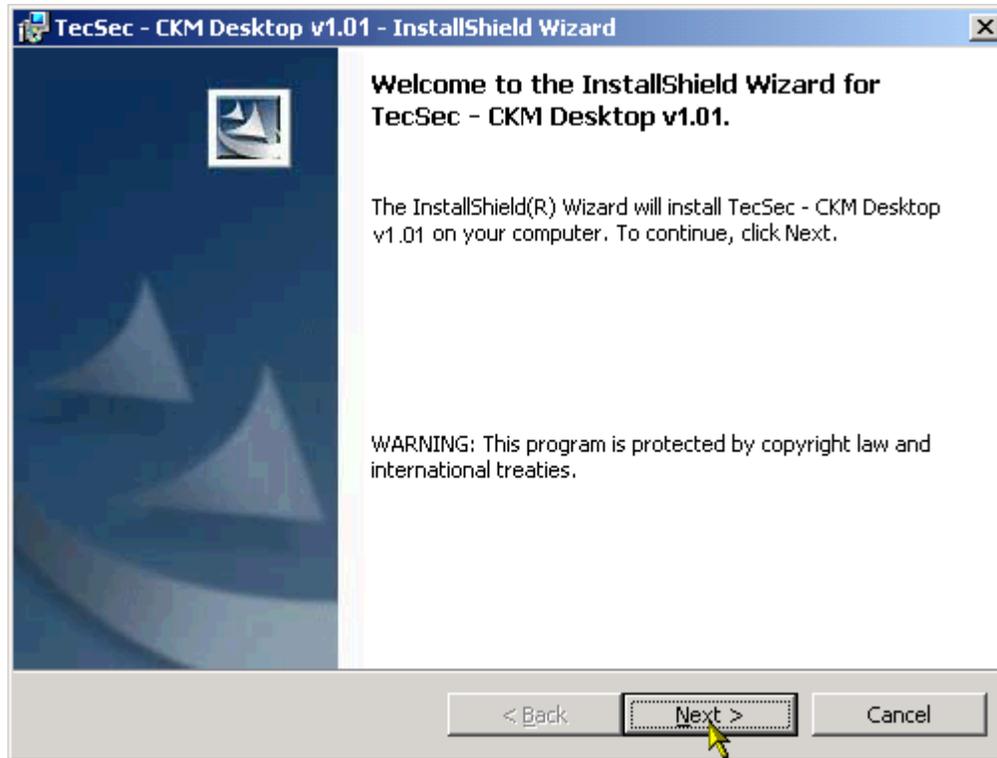
This process is preparing the InstallShield Wizard that guides you through the *CKM Desktop* installation process.

PLEASE BE PATIENT - The process takes several minutes to complete and an hourglass will not be displayed while you wait.

Once completed, you may or may not receive a prompt to restart your computer. If you do receive a prompt to restart, select the "**Start**" menu on your computer's desktop then select the **Shut Down** command from the resulting menu. You will be prompted to shut down Windows. Select **Restart** from the drop-down list and then select **OK**. Please do not remove the CD from the CD ROM drive.

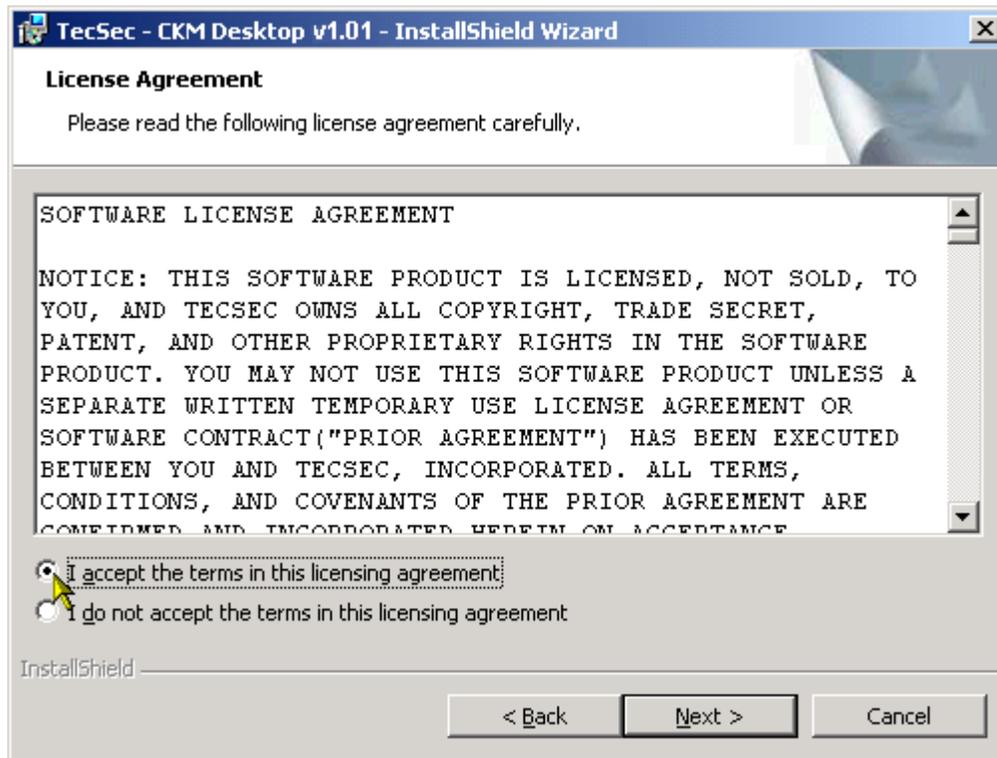
Whether or not your workstation has to be restarted, the installation of the *CKM Desktop* will automatically continue and the **Welcome** screen will be displayed.

Click "**Next**" to continue.



Please note: You may select "**Back**" from any of the screens to return to the previous screen or "**Cancel**" to cancel the installation of the CKM Desktop.

Next, the **License Agreement** screen is displayed.

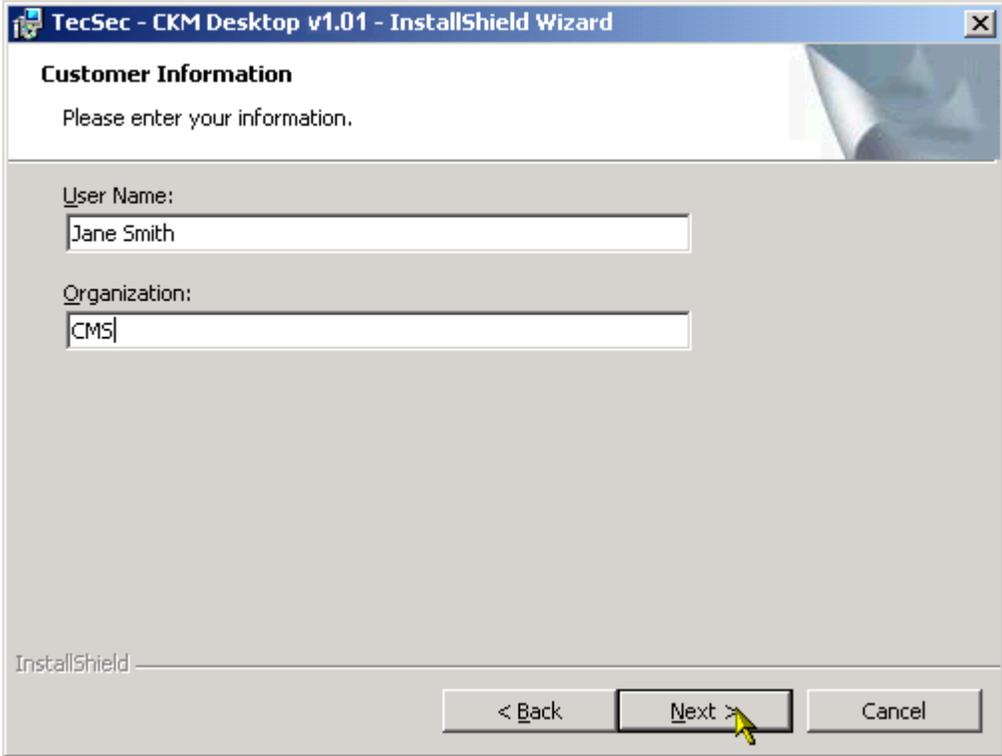


PLEASE READ THE AGREEMENT.

Click on the circle next to "I accept the terms in the license agreement".

Click "Next" to continue.

The **Customer Information** window will appear asking for you to enter your Name and Organization.



The screenshot shows a window titled "TecSec - CKM Desktop v1.01 - InstallShield Wizard". The main heading is "Customer Information" with the instruction "Please enter your information." Below this, there are two text input fields. The first is labeled "User Name:" and contains the text "Jane Smith". The second is labeled "Organization:" and contains the text "CMS". At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel". A mouse cursor is pointing at the "Next >" button. The "InstallShield" logo is visible in the bottom left corner of the window.

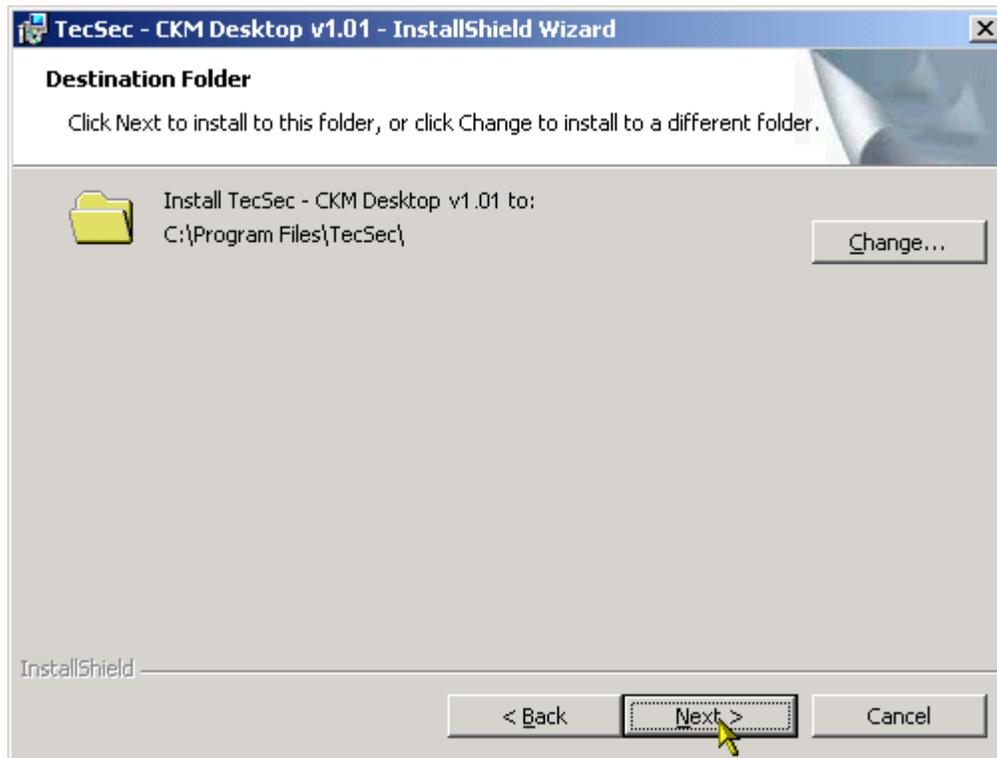
Enter the name of the person who the software is to be registered to under “**User Name**” and your organization under “**Organization**”. The organization may be CMS, State – XXXXXXX (for example State – Maryland), NIRT, etc.

Click “**Next**” to continue.

On the **Destination Folder** window, you will be prompted to confirm the location on your computer's hard drive in which you would like the software to be installed.

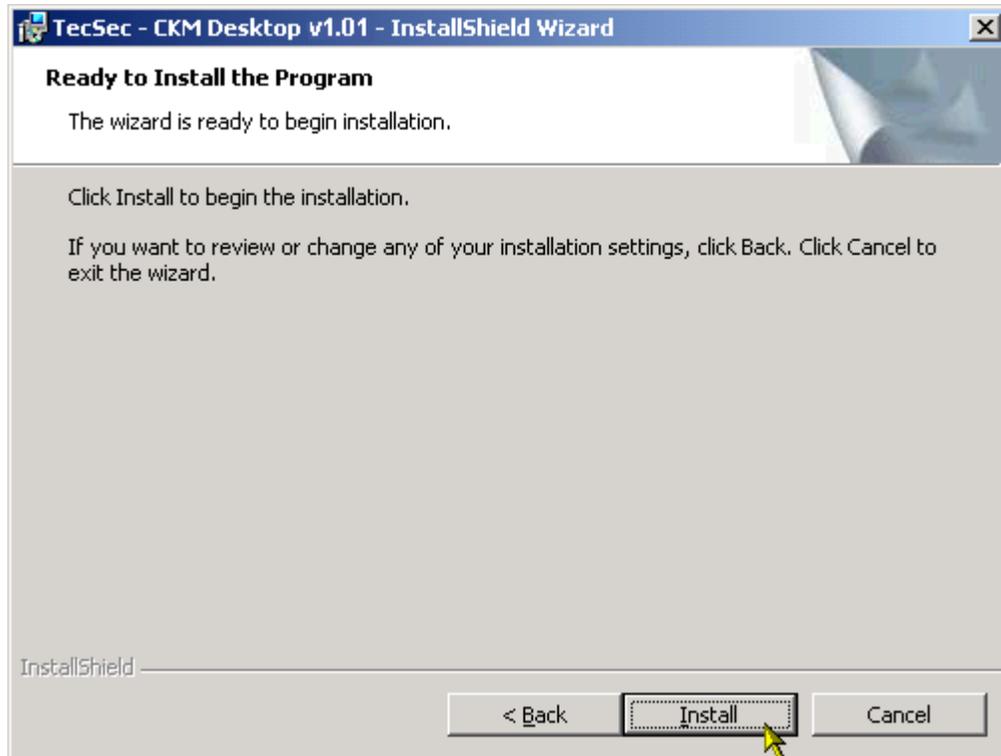
IT IS HIGHLY RECOMMENDED YOU LEAVE THE DESTINATION FOLDER AS THE DEFAULT (SEE BELOW):

Click "**Next**" to continue.

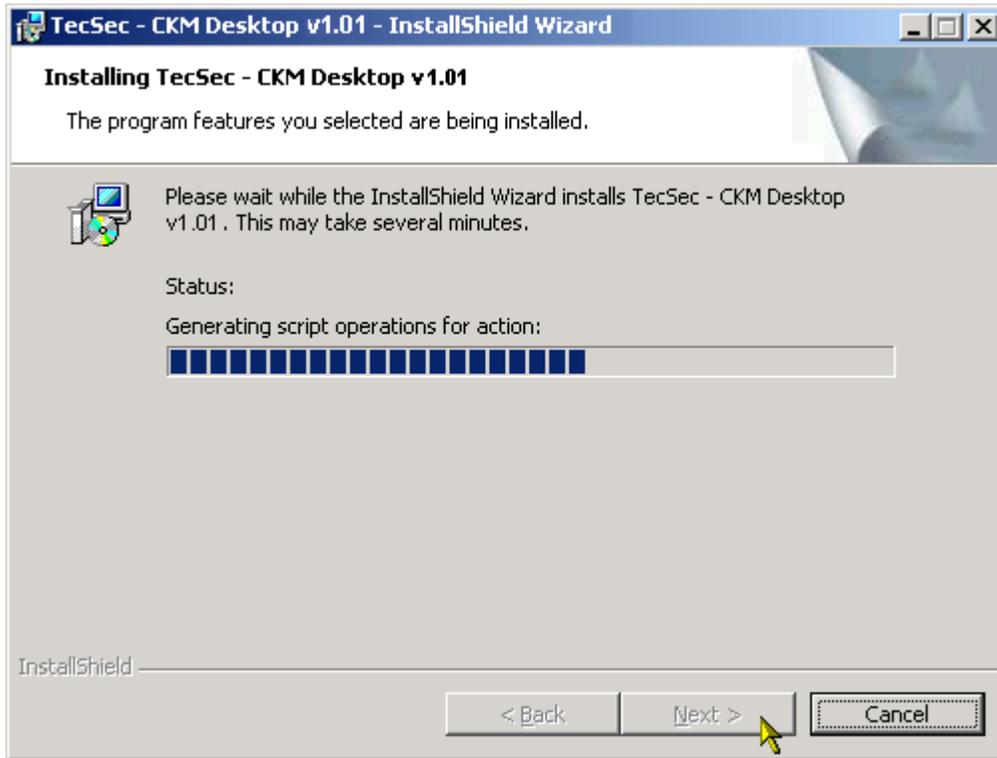


The Wizard is now ready to begin the installation of the *CKM Desktop*.

On the **Ready to Install the Program** window, click “**Install**” to begin the installation process.

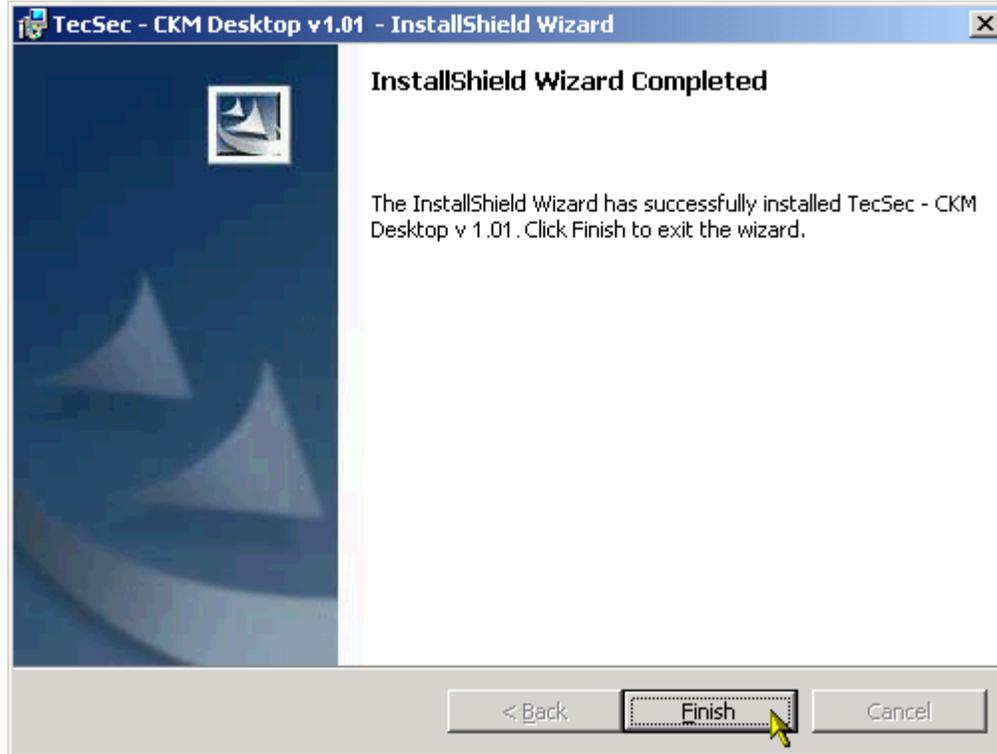


While the necessary files are being installed, the following status screen displays.



Once the installation is complete, the **InstallShield Wizard Completed** screen displays (see next page).

From the **InstallShield Wizard Completed** screen, click **Finish**.



You will return to the Tec Sec Constructive Key Management **Install Products** menu.

The installation of the *CKM Desktop* is complete.

From the *Install Products* menu, choose **Main Menu**.

From the *Main Menu*, choose **Exit**.

Installing your Root Certificate

In order to use *CKMfile*, the file encryption and decryption utility of the *CKM Desktop* suite, you must have a Root Certificate and a Token (see sections on Registering and Designating your Token). You will have received this Root Certificate from your CMS Administrator. Before you can start working with *CKMfile*, you must install the Root Certificate.

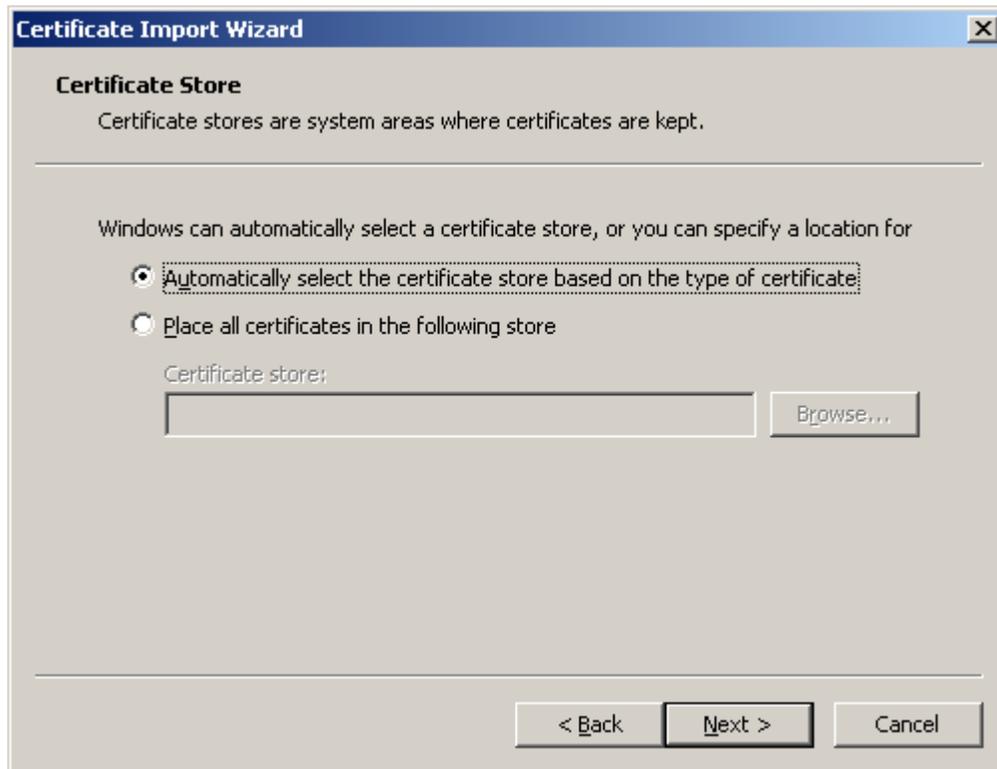
To install your Root Certificate, use the following steps.

1. Save the **RootCA.cer** file to your workstation's hard drive.
2. Using **Microsoft® Windows Explorer** or a similar file navigator tool, locate the **RootCA.cer** file.
3. **Right-click** the **RootCA.cer** file and select **Install Certificate** from the resulting menu.
4. The Certificate Import Wizard "**Welcome**" window will display.



5. Click "**Next**" to continue.

- The **Certificate Store** window is displayed.



- Leave all settings as they appear (i.e., top button selected and the bottom unselected with the *Certificate store:* area blank.).
- Click "**Next**" to continue.

9. The **Completing the Certificate Import Wizard** window is displayed.



10. Click the **Finish** button.

11. When the "Import was successful" screen appears, click **OK**.



Registering Your Token

Additionally, to use *CKMfile*, the file encryption and decryption utility of the *CKM Desktop* suite, you must have a Token. You will have received this Token – along with the Password for the Token – from your CMS Administrator. Before you can start working with *CKMfile*, you must register your Token in *CKM®Tokens*.

To register your Token and add it to *CKMTokens*, use the following steps.

12. Save the Token (file has a .tok extension) to your workstation's hard drive.
13. Using **Microsoft® Windows Explorer** or a similar file navigator tool, locate the .tok file.

Important: If the file does not retain the .tok extension, you will need to rename the file to add the .tok extension back onto the file.
14. **Double-click** the .tok file or **right-click** the .tok file and select **Open** from the resulting menu.
15. A window will display confirming "Would you like to move the token to the default token directory", click "**Yes**".
16. Once the Token is moved, a confirmation window appears stating, "1 token(s) has been successfully registered", click "**OK**".

This registers your Soft Token. The Soft Token will be automatically added to the Token list in *CKM Tokens*. You will be able to view your newly registered Soft Token once you open *CKM Tokens*.

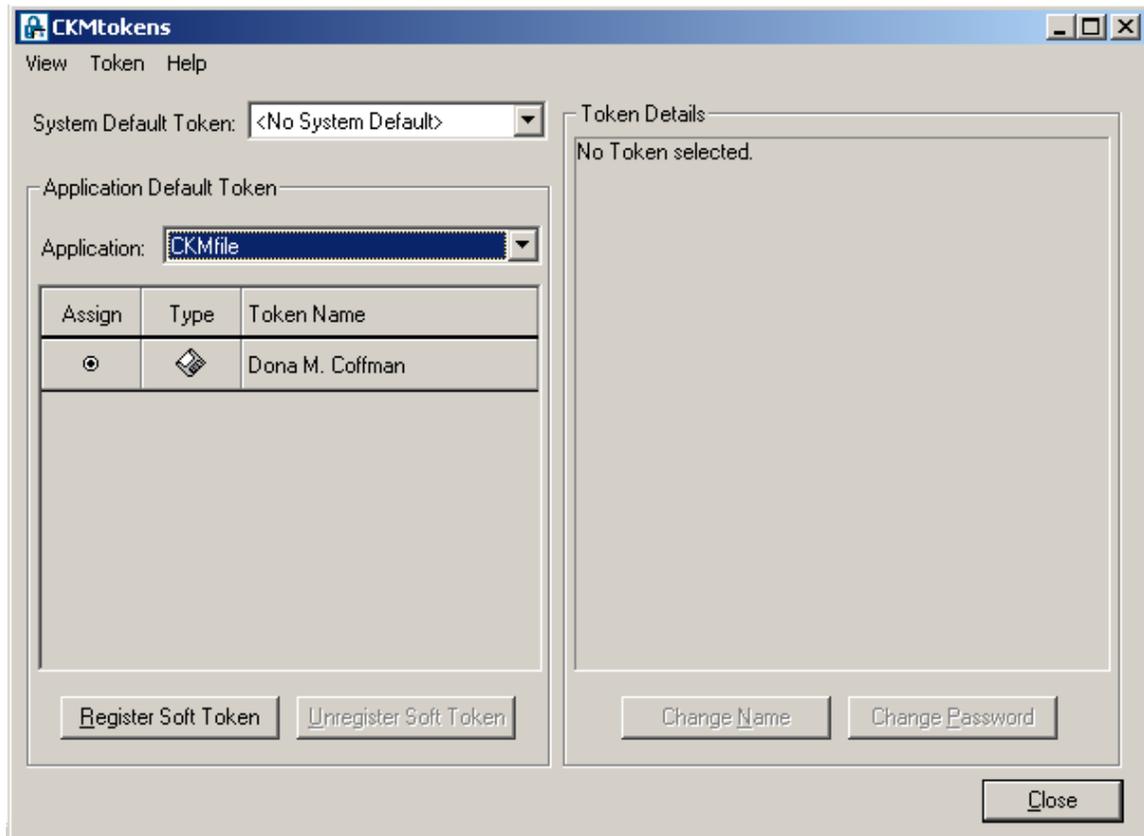
Designating Your Token

After you register your Token, you must designate your Token to use CKMfile to encrypt/decrypt and electronically sign and verify signed documents.

Accessing CKM Tokens

1. Select the **Start** menu from your desktop.
2. Select the **Programs** menu from the **Start** menu.
3. Select the **TecSec** menu from the **Programs** Menu.
4. Select the **CKMTokens** option from the **TecSec** menu. This will launch *CKMTokens*.

Designating your Token



Assigning your Token

To assign your Token for use with *CKMfile*, on the *CKMTokens* window:

1. Ensure that *<No System Default>* is selected as the **System Default Token** using the drop-down arrow.
2. Select "**CKMfile**" from the **Application** list.
3. In the **Application Default Token** area under the **Assign** column, select the radio button (circle outlined in black) for the desired Token. The column is selected when the circle is filled in (see sample screen above).
4. Click "**Close**" to complete the process.

Important: PASSWORDS CANNOT BE RESET. If you change your password and then cannot remember what you changed it to, a new token will have to be issued to you. The re-issuance of tokens will take 2-3 working days.

Setting CKM Desktop Preferences

Finally, there are a few *CKM[®] Desktop Preferences* that need to be established to make it possible for you to successfully use your Digital Certificate to electronically sign files.

To set these preferences, you will need to activate the *CKM Desktop Tray* icon to access the *CKM[®] Preferences* window.

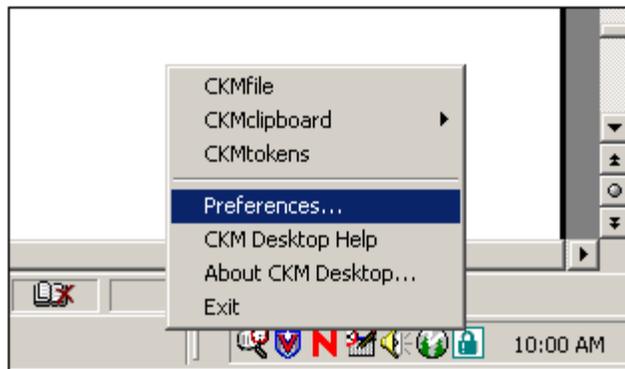
Accessing the CKM Desktop Preference Window

1. Select the **Start** menu from your desktop.
2. Select the **Programs** menu from the **Start** menu.
3. Select the **TecSec** menu from the **Programs** Menu.
4. Select the **CKM Desktop** command from the **TecSec** menu. This will display the *CKM Desktop* tray icon in your system tray (usually located at the bottom right-hand corner of your computer's desktop).
5. Right-click on the **CKM Desktop** tray icon in your system tray.

This is the *CKM Desktop* tray icon (shown below).



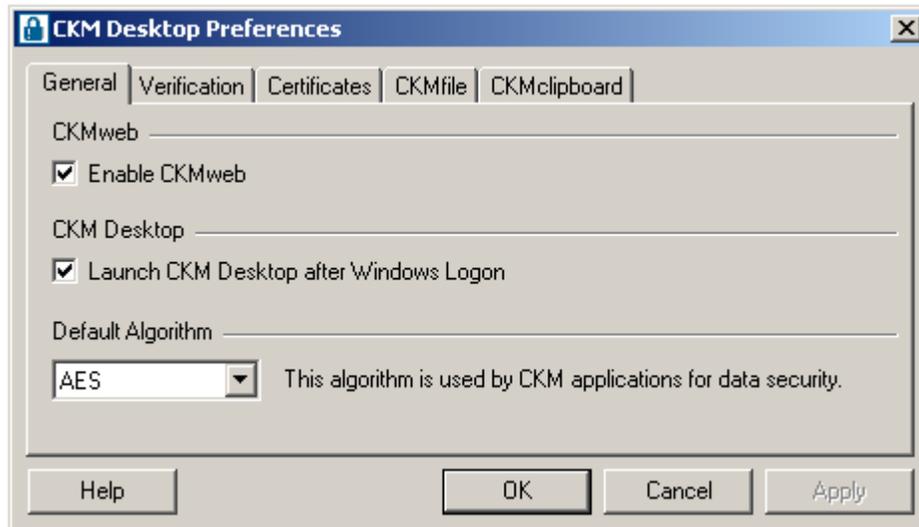
Right-click the *CKM Desktop* tray icon, located in your system tray.



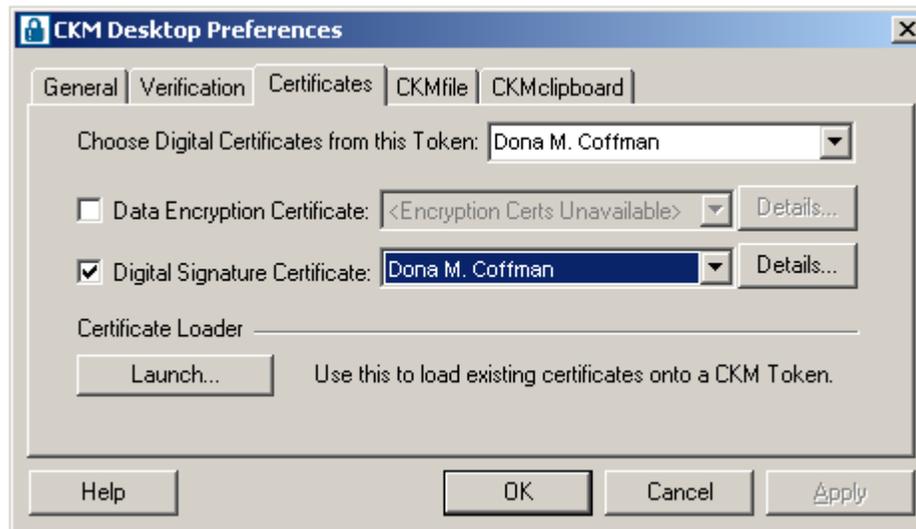
6. Select **Preferences...** (See above).
7. The *CKM Desktop Preferences* window will appear as shown below.

Setting Certificates for Encryption and Signing

In order for you to encrypt and/or electronically sign files using *CKMfile*, you first need to select the Certificate to be used for encrypting and electronically signing.



1. On the **CKM Desktop Preferences** window, select the **Certificates** tab.

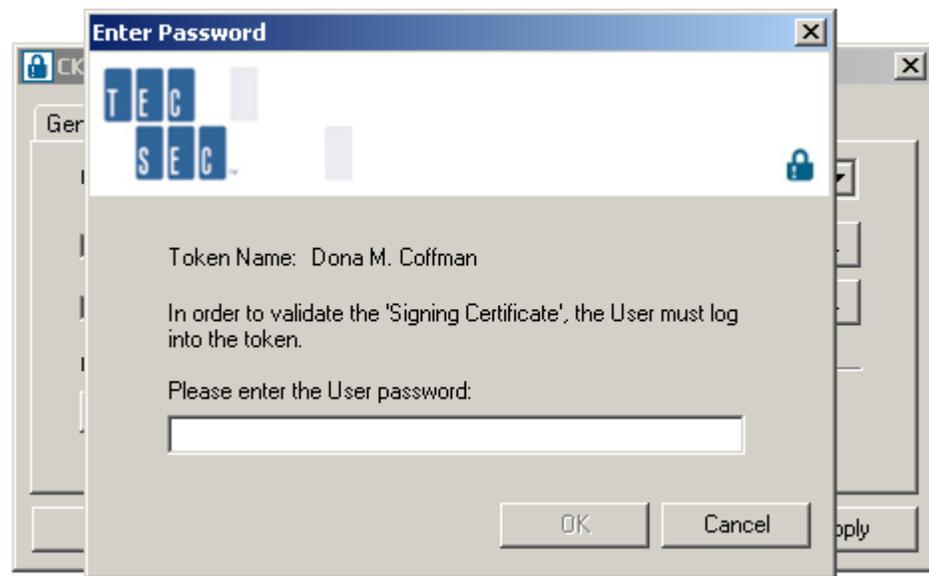


Under the **Certificates** tab:

2. Next to **“Choose Digital Certificates from this Token:”** select the name of the person who the software is to be registered to using the drop-down.
3. Do NOT select (i.e., check) the **“Data Encryption Certificate:”** box.
4. The **“Data Encryption Certificate:”** box will be unavailable for selection.

5. Select (check) “**Digital Signature Certificate:**” box.
6. Select the name of the person who the software is to be registered to using the drop-down in the “**Digital Signature Certificate:**” box.
7. Click the **Apply** button.
8. You will be prompted to enter the Password for the Token. On the **Enter Password** window, enter the password of the person who the software is to be registered to and select **OK** button.

VERY IMPORTANT: Your Password is case sensitive.



Important: PASSWORDS CANNOT BE RESET. If you change your password and then cannot remember what you changed it to, a new token will have to be issued for you. The re-issuance of tokens will take 2-3 working days.

9. The **CKM Desktop Preferences** window appears again. Select the **OK** button to save your changes and close the window.

The Installation is complete. Please refer to the e-SPA User's Guide for further information and/or guidance on the use of the e-SPA process.