# 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<sup>®</sup>, Incorporated's Constructive Key Management<sup>®</sup> (CKM<sup>®</sup>) technology. These products include *CKM<sup>®</sup>file* and *CKM<sup>®</sup>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<sup>®</sup> Windows<sup>®</sup> 98 Second Edition (SE)/ Microsoft<sup>®</sup> Windows Millennium Edition (ME)
- 128 MB of RAM for Microsoft<sup>®</sup> Windows NT<sup>®</sup>, Microsoft<sup>®</sup> Windows<sup>®</sup> 2000
- Operating Systems:
  - Microsoft<sup>®</sup> Windows XP Professional , or
  - Microsoft<sup>®</sup> Windows<sup>®</sup> 2000 Professional with Service Pack (SP) 1+, or
  - Microsoft<sup>®</sup> Windows<sup>®</sup> 2000 Server with SP 1+, or
  - Microsoft<sup>®</sup> Windows 2000<sup>®</sup> Advanced Server with SP 1+, or
  - Microsoft<sup>®</sup> Windows NT<sup>®</sup> Workstation 4.0 with SP 6+, or
  - Microsoft<sup>®</sup> Windows NT<sup>®</sup> 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).

TEC SEC	Constructive Key Management
	Install Products Browse CD Contents View Our Website
	Exit

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

# Installation of CKM<sup>®</sup> 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 <u>do not</u> 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.

🔂 TecSec - CKM Desktop v1.01 - InstallShield Wizard	×
License Agreement Please read the following license agreement carefully.	4
SOFTWARE LICENSE AGREEMENT	
NOTICE: THIS SOFTWARE PRODUCT IS LICENSED, NOT SOLD, TO YOU, AND TECSEC OWNS ALL COPYRIGHT, TRADE SECRET, PATENT, AND OTHER PROPRIETARY RIGHTS IN THE SOFTWARE PRODUCT. YOU MAY NOT USE THIS SOFTWARE PRODUCT UNLESS A SEPARATE WRITTEN TEMPORARY USE LICENSE AGREEMENT OR SOFTWARE CONTRACT ("PRIOR AGREEMENT") HAS BEEN EXECUTED BETWEEN YOU AND TECSEC, INCORPORATED. ALL TERMS, CONDITIONS, AND COVENANTS OF THE PRIOR AGREEMENT ARE CONFIDMED AND INCORPORATED HEREIN ON ACCEPTANCE I accept the terms in this licensing agreement do not accept the terms in this licensing agreement	T
<pre></pre>	

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.

🚏 TecSec - CKM Desktop v1.01 - InstallShield Wiz	ard 🔀
<b>Customer Information</b> Please enter your information.	
User Name: Jane Smith	
Organization: [CMS]	
InstallShield	
<u>Back</u>	Cancel

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.

🙀 TecSec -	CKM Desktop v1.01 - InstallShield Wizard						
Destinati Click Nex	Destination Folder Click Next to install to this folder, or click Change to install to a different folder.						
	Install TecSec - CKM Desktop v1.01 to: C:\Program Files\TecSec\						
InstallShield -	< <u>Back</u> Cancel	-					

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.

🔂 TecSec - CKM Desktop v1.01 - Inst	allShield Wiza	rd	×
<b>Ready to Install the Program</b> The wizard is ready to begin installation	۱.		
Click Install to begin the installation.			
If you want to review or change any of exit the wizard.	f your installation	n settings, click Back.	Click Cancel to
InstallShield			
	< <u>B</u> ack	Install	Cancel

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

🙀 TecSec -	CKM Desktop v1.01 - InstallShield Wizard	_ 🗆 🗡
<b>Installing</b> The prog	gram features you selected are being installed.	
P	Please wait while the InstallShield Wizard installs TecSec - CKM Desktop v1.01 . This may take several minutes.	
	Status:	
	Generating script operations for action:	
TostallShield		
unscalionielo –	< <u>B</u> ack <u>N</u> ext >	ncel

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<sup>®</sup> 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.

Certificate Import Wizard		×
	Welcome to the Certificate Import Wizard         This wizard helps you copy certificates, certificate trust lists, and certificate revocation lists from your disk to a certificate store.         A certificate, which is issued by a certification authority, is a confirmation of your identity and contains information used to protect data or to establish secure network connections. A certificate store is the system area where certificates are kept.         To continue, click Next.	
	< Back Next > Cancel	

5. Click "Next" to continue.

6. The Certificate Store window is displayed.

Certificate Import Wizard	×
Certificate Store	
Certificate stores are system areas where certificates are kept.	
	-
Windows can automatically select a certificate store, or you can specify a location for	
<ul> <li>Automatically select the certificate store based on the type of certificate</li> </ul>	
C Place all certificates in the following store	
Certificate store;	
Browse	
< Back Next > Cancel	

- 7. Leave all settings as they appear (i.e., top button selected and the bottom unselected with the *Certificate store:* area blank.).
- 8. 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<sup>®</sup>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<sup>®</sup> 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

🔒 C	KMtokei	ns			
View	Token	Help			
Syst	tem Defai	ult Token:	<no default="" system=""></no>	Token Details No Token selected.	
⊢Ар	plication l	Default T	oken		
Ap	plication:	CKMfile			
	Assign	Туре	Token Name		
	۲	٨	Dona M. Coffman		
	<u>R</u> egister	r Soft Tok	en Unregister Soft Token	Change <u>N</u> ame Change <u>P</u> assword	
					se

#### 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 dropdown 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<sup>®</sup> 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*<sup>®</sup> *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.

🔒 CKM Desktop Preferences	×
General Verification Certificates CKMfile CKMclipboard	
CKMweb	_ [
Enable CKMweb	
CKM Desktop	
Value CKM Desktop after Windows Logon	
Default Algorithm	
AES This algorithm is used by CKM applications for data security	
Help OK Cancel Apply	

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

CKM Desktop Preferences	×
General Verification Certificates CKMfile CKMclipboard	
Choose Digital Certificates from this Token: Dona M. Coffman	
🗖 Data Encryption Certificate: < Encryption Certs Unavailable> 💌 Details	
Digital Signature Certificate: Dona M. Coffman	
Certificate LoaderUse this to load existing certificates onto a CKM Token.	
Help OK Cancel Apply	

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.

	Enter Password	×		
Ger	TEC SEC~	₽	2	×
	Token Name: Dona M. Coffman In order to validate the 'Signing Certificate', the User must log into the token. Please enter the User password:			
	OK Cancel		oply	

**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.