

Casper User Manual

Table of Contents – PART 2: Casper eRegister

PART 2: CASPER eREGISTER

Chapter 1: Overview of CasperWeb	63
In this Chapter.....	63
CasperWeb Menus	63
CasperWeb Capabilities	65
Customer Information	65
Product Information	65
Options and Levels	65
Product Code.....	66
Site Key Generator	66
Prerequisites	66
Chapter 2: Using CasperWeb.....	67
In this Chapter.....	67
Serial Numbers	67
Log on to CasperWeb	68
Log Off CasperWeb	71
Navigation in CasperWeb	71
security considerations	72
Error Messages.....	73
Chapter 3: Managing Products	75
Set Up Products.....	75
Add Product Information	76
Modify Product Information	86
Delete Product Information	90
Set Up Executables, Options and Levels	93
Add Executable ID	93
Add Executable Version	98
Add Options and levels.....	101
Define License Types	112
Add a License Type.....	112
Add Product Codes.....	115
Product Setup Wizard	116

Product Code Browser.....	120
Chapter 4: Managing Customers	129
Add Customer Information	129
Edit Customer Information.....	136
Delete Customer Information	139
Display Customer History.....	140
Generate Site Keys	142
Chapter 5: Managing CasperWeb	149
User Maintenance	150
Add a User.....	150
Delete a User	153
Change a User Password from SuperUser Menu	155
System Maintenance.....	156
General 157	
Email Server Set-Up	160
E-Receipt	161
Licensing via Email	162
Easy License.....	163
Auto Import	165
Chapter 6: Test Casper eRegister.....	167
Authorize your Casper Software	167
Test Casper Software using Company Data	168
Chapter 7: Reports and Administration.....	171
Admin Menu.....	172
Generate Reports	172
Change User Password from Admin Menu	175
Index.....	177

List of Tables

Table 2-1: Function Buttons in CasperWeb.....	71
Table 3-1: Executable ID – Data Entry Fields.....	95
Table 3-2: Executable Version -- Data Entry Fields.....	99
Table 3-3: Levels -- Data Entry Fields	104
Table 3-4: Options – Data Entry Fields.....	108

Table 3-5: Product Setup Wizard -- Data Entry Fields	116
Table 4-1: Customer Information—Data Entry Fields.....	131
Table 4-2: Site Key Generator —Data Entry Fields.....	145
Table 5-1: Add New User — Data Entry Fields	152
Table 5-2: System Maintenance/General Page/General – Data Entry fields.....	159
Table 5-3: System Maintenance/General Page/Database area – Data Entry fields.....	159
Table 5-4: System Maintenance/General Page/CasperWeb Login Information – Data Entry fields.....	160
Table 5-5: System Maintenance/Email Server – Data Entry fields	161
Table 5-6: System Maintenance/Licensing via Email – Data Entry fields	162
Table 5-7: System Maintenance/Easy License – Data Entry fields	164
Table 5-8: System Maintenance/Auto Import – Data Entry fields	165

List of Figures

Figure 1-1 CasperWeb Main Menu	64
Figure 2-1 CasperWeb Log In screen	68
Figure 2-2 License Status window	69
Figure 2-3 Log in to Main Menu	70
Figure 2-4 Multi-company License indicator.....	70
Figure 2-5 Log out message	71
Figure 2-6 Installation from Download password	73
Figure 2-7 Exception Error message.....	74
Figure 3-1 Family and Product screen	77
Figure 3-2 Add Family screen	78
Figure 3-3 Add Family – example	79
Figure 3-4 Add Family message	80
Figure 3-5 Select a Family and add a Product	81
Figure 3-6 Add Product screen	81
Figure 3-7 Add Product successful message	82
Figure 3-8 Add Product Version screen	83
Figure 3-9 Add Product Version message	84
Figure 3-10 Add Product Number message	85
Figure 3-11 Add Product Version and Number message.....	86

Figure 3-12 Edit Product description	87
Figure 3-13 Edit Product screen.....	88
Figure 3-14 Product description updated message	89
Figure 3-15 Product Number Description updated	90
Figure 3-16 Invalid Deletion message	91
Figure 3-17 Edit Product screen for deletion	92
Figure 3-18 Verify deletion dialog box	92
Figure 3-19 Executables, Options and Levels screen – Add Executables	94
Figure 3-20 Add Executable screen	95
Figure 3-21 Password required message.....	97
Figure 3-22 Executable added successfully message.....	98
Figure 3-23 Add Executable Version screen	99
Figure 3-24 Executable Version Added message	100
Figure 3-25 Executables, Options and Levels screen – Add Levels.....	103
Figure 3-26 Add Levels screen.....	104
Figure 3-27 Level added message	106
Figure 3-28 Executables, Options and Levels screen – Add Option	107
Figure 3-29 Add Option screen	108
Figure 3-30 Option added message	110
Figure 3-31 New Option is listed	111
Figure 3-32 Edit License Type screen.....	112
Figure 3-33 Add License Type screen.....	113
Figure 3-34 License Type added message	114
Figure 3-35 License Type updated successfully message	115
Figure 3-36 Setup Wizard screen – defaults	116
Figure 3-37 Add Product Code using Product Setup Wizard.....	118
Figure 3-38 Product Code Browser listing added Product Code	119
Figure 3-39 Product Code Browser screen	120
Figure 3-40 Product Code Add screen	121
Figure 3-41 Customer History showing HDSN	122
Figure 3-42 Add Product Code using Product Code Browser	123
Figure 3-43 Product Code added successfully message	123
Figure 3-44 Verify Product Code added	124

Figure 3-45 Product Code View screen	125
Figure 3-46 Product Code – modify details	126
Figure 3-47 Select Product Code to delete	126
Figure 3-48 View Product Code to delete	127
Figure 3-49 Verify Product Code deletion	127
Figure 3-50 Product Code list with deletion.....	128
Figure 4-1 Add Customer screen	130
Figure 4-2 Customer added	135
Figure 4-3 Customer added successfully message.....	135
Figure 4-4 Customer Serial Number search.....	136
Figure 4-5 Serial Number search results.....	137
Figure 4-6 Edit Customer screen—User fields	138
Figure 4-7 Edited Customer Information	138
Figure 4-8 Find Customer record to delete	139
Figure 4-9 Verify Customer record deletion	139
Figure 4-10 Customer Information screen.....	141
Figure 4-11 Customer History for specified Serial Number	141
Figure 4-12 Site Key Generator screen.....	143
Figure 4-13 Check Site Code test message.....	144
Figure 4-14 Manually generated Site Key	145
Figure 5-1 SuperUser menu.....	149
Figure 5-2 User Maintenance screen	151
Figure 5-3 Add New User screen	152
Figure 5-4 New User added successfully message	153
Figure 5-5 Delete User confirmation	154
Figure 5-6 User Deleted message	155
Figure 5-7 Change Password – from User Maintenance screen.....	156
Figure 5-8 System Maintenance – General.....	158
Figure 5-9 System Maintenance – Email Server	160
Figure 5-10 System Maintenance – Licensing via Email.....	162
Figure 5-11 System Maintenance – EasyLicense	164
Figure 5-12 System Maintenance – Auto Import.....	165
Figure 6-1 CrypKey Instant with Casper enabled.....	169

Figure 7-1 Administration menu 171

Figure 7-2 Reports screen..... 172

Figure 7-3 Expired Licenses Report by Day 174

Figure 7-4 Serial Numbers Report by Day..... 175

Figure 7-5 Change Password – from Admin menu..... 176

Chapter 1: Overview of CasperWeb

CasperWeb is your online interface for managing customer and product information.

CasperWeb is an easy interface that allows you to access and manage your customer and product information, as well as maintain the system.

In this Chapter

In this chapter you will find information on:

- CasperWeb menus
- CasperWeb functionality
- prerequisites for using CasperWeb

CasperWeb Menus

CasperWeb is a web-based user interface. The main menu contains five submenus (see Figure 1-1 CasperWeb Main Menu). Each submenu contains links to these function screens:

- **Customer Info**
 - add and edit customer information
- **Product**
 - add and manage product codes
 - configure executables, options and levels
 - manage product families and products
 - specify the license type
 - use the setup wizard to quickly set up products

- **Admin**
 - generate reports (sales, expired licenses, authorizations, serial numbers)
 - specify the exchange rate (for credit card transactions)
 - change the user password
- **SuperUser**
 - configure users, set access levels, change passwords
 - configure email, database and CasperWeb log parameters
 - set up CrypKey eTransfer
- **Contact**
 - how to contact CrypKey
 - CasperWeb copyright information and website link

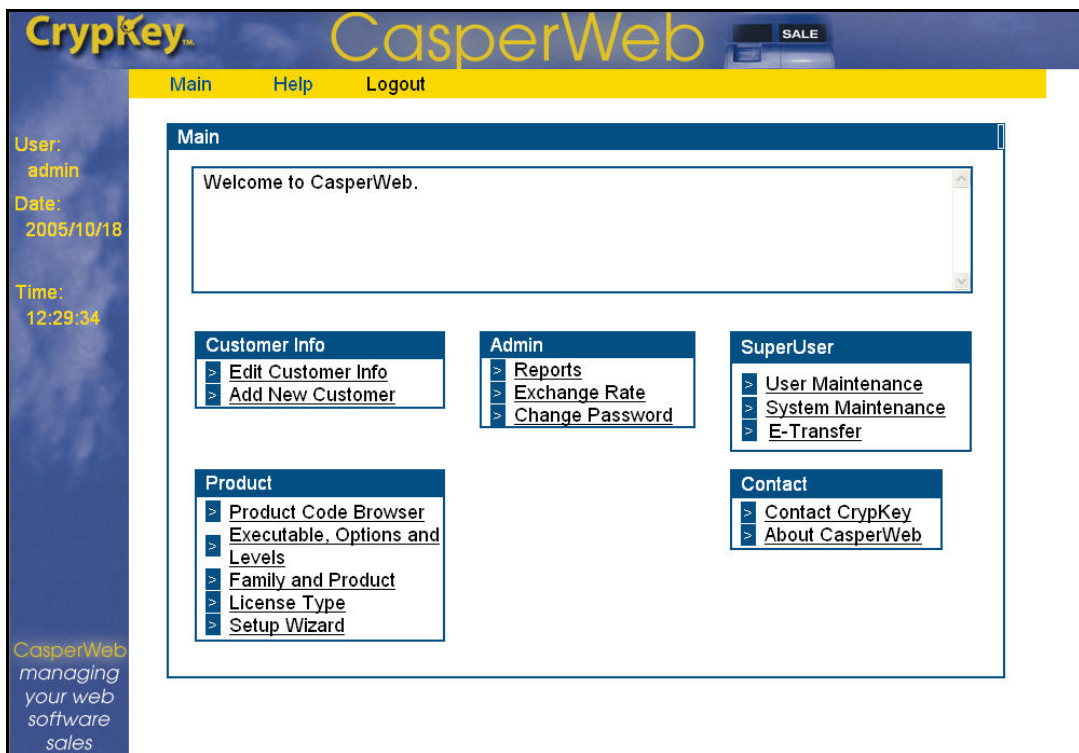


Figure 1-1 CasperWeb Main Menu

CasperWeb Capabilities

Using the CasperWeb interface, you can carry out the following tasks related to your business:

- configure product families, products, executables, license restrictions, and product codes
- record customer information, including Serial Number, customer name, customer number, product name, license restrictions, and invoice number
- apply and enforce restrictions on the use of your software
- generate a report of product license authorizations
- import customer, license, and product data

CUSTOMER INFORMATION

This function is central to the operation of CasperWeb. The key data field in customer information is the Serial Number, which represents the customer's purchase of a specific product or add-on. Each customer record could contain essential data besides the Serial Number, including customer name, customer number, product identifier, license restrictions, and invoice number.

The Customer History feature displays the history of Site Key transactions by Serial Number (that is, by product and customer).

PRODUCT INFORMATION

The Product Code consists of information that you will use to organize your company's products.

You must always include the three required fields when defining products: executable name/filename, password, and product number (see *Product Setup Wizard* on page 116).

OPTIONS AND LEVELS

Options and Levels give you flexibility in licensing different options for an application.

An Option is a feature of the software that can be turned on or off in any combination. You can have one or more options enabled at the same time.

A Level is a set of features that is defined as 'on' when any single level is chosen. Only one level can be set at a time. See *Add Options* on page 101 for more information.

PRODUCT CODE

The Product Code is a configuration of product family, product name, executable, license type, and other data items. A Product Code represents a specific software configuration (i.e. license usage restrictions) for which a customer could be authorized. A Product Code identifies this specific license configuration, which makes it easy to track in CasperWeb.

SITE KEY GENERATOR

You can issue Site Keys manually to customers using the Site Key Generator. You can set the end user's license restrictions by generating a Site Key manually. The Site Key Generator uses several types of information from CasperWeb, such as product family, product name, executable, and license type, to generate a Site Key.

An example of when you would issue a Site Key manually using CasperWeb is when your customer requests a license via telephone, fax, or regular email (i.e., not sending an email via the Client Interface Wizard program).

Prerequisites

- In order to use CasperWeb you will need an Internet connection and/or SMTP/POP3 email service.
- See *Part 1: Setting Up Casper* for a complete list of prerequisites needed to use Casper

Chapter 2: Using CasperWeb

The Serial Number is the key information used by CasperWeb to find and manage customer records.

Casper is a real-time, Internet-based application with a design based on the client-server model.

In this Chapter

In this chapter you will find information on:

- Serial numbers
- logging on and off CasperWeb
- error messages
- navigating in CasperWeb

Serial Numbers

There are two methods of software authorization available in Casper: serial number and credit card. eRegister uses the serial number authorization method only. See *Part 1: Setting up Casper, Chapter 2: Technical Help, Configuring Casper* for more information. (eCommerce uses the credit card authorization method – see *Part 3: Casper eCommerce*.)

As the software vendor you provide Serial Numbers (based on whatever system you choose—see samples in the following sections). You provide these Serial Numbers to your customers. Casper issues software licenses to customers with a valid Serial Number. The customer enters the valid Serial Number into the Client Interface (see *Part 1, Chapter 3: Getting Started, Client Demo Interface*). CasperWeb uses the Serial Number to authenticate the use of your CrypKey-protected software before authorizing its use by your customer. Casper issues a license. The license contains the restrictions you assigned to the Product Code associated with the Serial Number.

Log on to CasperWeb

To log on to or exit CasperWeb, see the following procedures.

Procedure

1. Open your Internet browser.
2. In the address bar, type the online address of your CasperWeb server/CasperWeb.
For example:

http://mycasper/casperweb

The Login window displays:

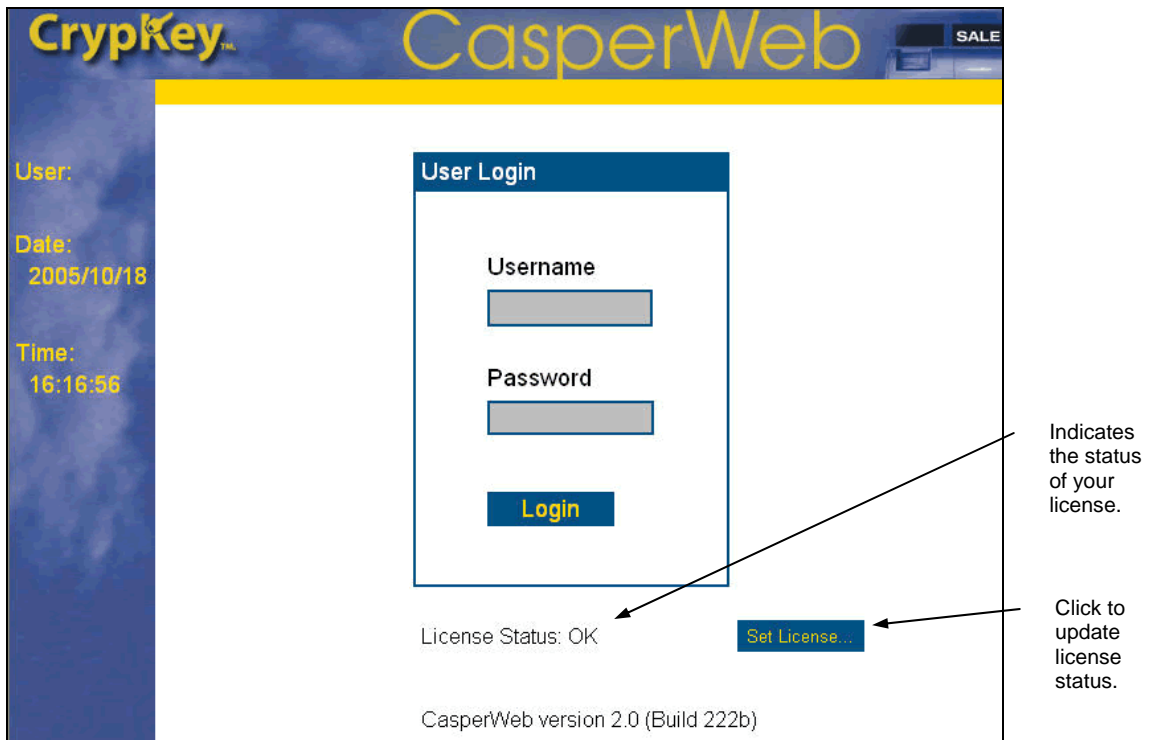


Figure 2-1 CasperWeb Log In screen

3. The license status will either read OK or it will prompt for a license automatically.
If it does not, click the **Set License** button to view the following window:

The image shows a web interface titled "Casper Server License". Below the title, it says "License Status: Not Licensed". There are two input fields: "Site Code" with the value "D2AA 950C 4E94 2492 D3" and "Site Key" which is empty. To the right of the "Site Key" field is a blue "Save" button. Below the "Site Key" field is a blue "Return to Login" button. Two arrows point from the right side of the image to the "Site Key" field and the "Save" button, with labels "Enter Site Key." and "Click Save." respectively.

Figure 2-2 License Status window

4. The Site Code is displayed automatically. Enter the Site Key.

Note: To obtain a Site Key, send the Site Code to authorize@crypkey.com with your customer service number and company name. CrypKey Authorization will send you a Site Key.

5. Click **Save**.
6. Click **Return to Login**. The License Status should now read OK.
7. To obtain the default username and password, contact CrypKey. Enter these two values. Note they are not case-sensitive.

Note: The username is admin; the password is the password that the user entered when they installed the Casper product.

8. Click the **Login** button. The Main menu displays:

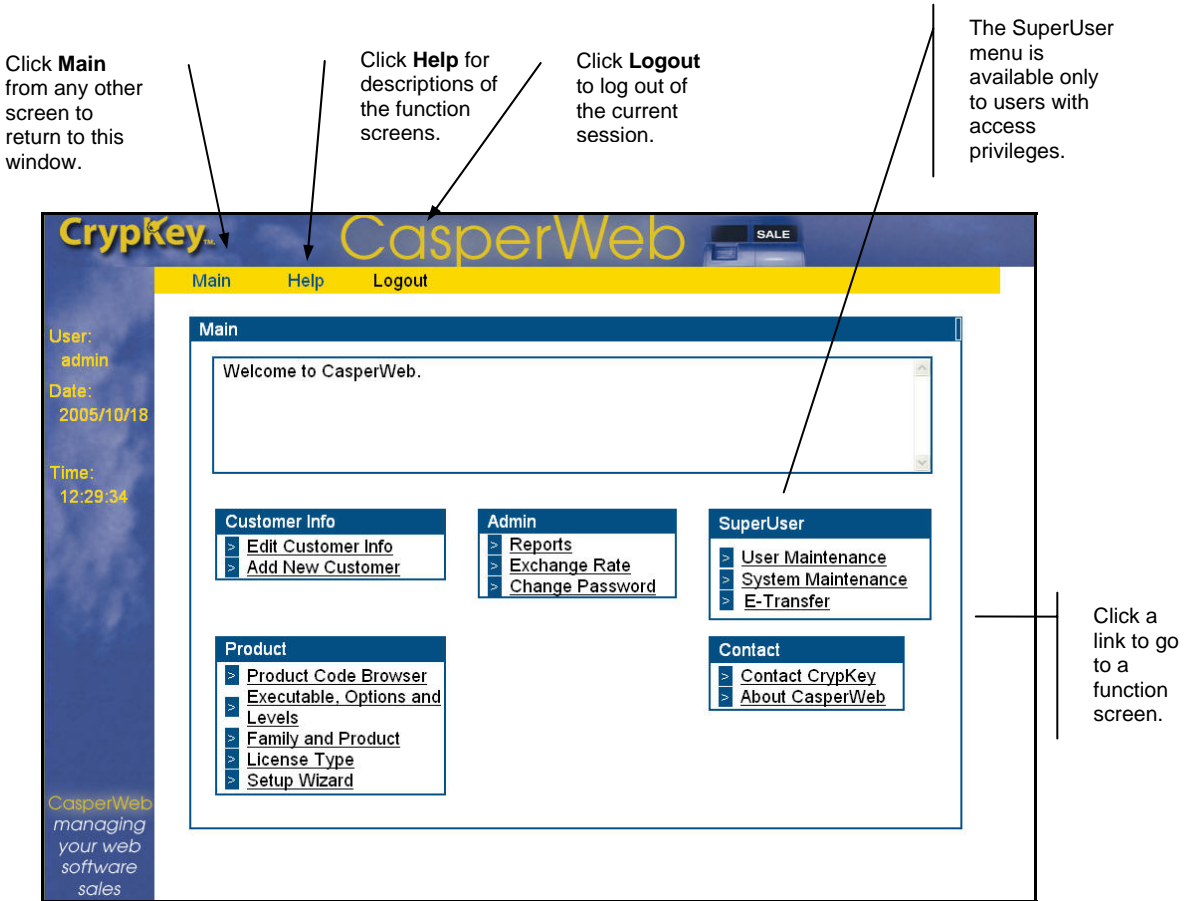


Figure 2-3 Log in to Main Menu

- Click a menu option, for example Add New Customer, to go to that screen.

Note: In some of the following figures you may notice this text at the top of a screen:

Company Number: 0

Figure 2-4 Multi-company License indicator

This will be present only if you are using an optional multi-company license. A multi-company license is normally not used and therefore will not appear on your CasperWeb interface. It is included in this manual only for purposes of demonstration.

Log Off CasperWeb

Procedure

You can log off CasperWeb from any screen displaying the Logout option in the menu at the top of the screen.

Note: We recommend you always log out as a security precaution. CasperWeb will time out after a certain period of inactivity.

1. Click the **Logout** option on the menu bar. CasperWeb displays the following message:

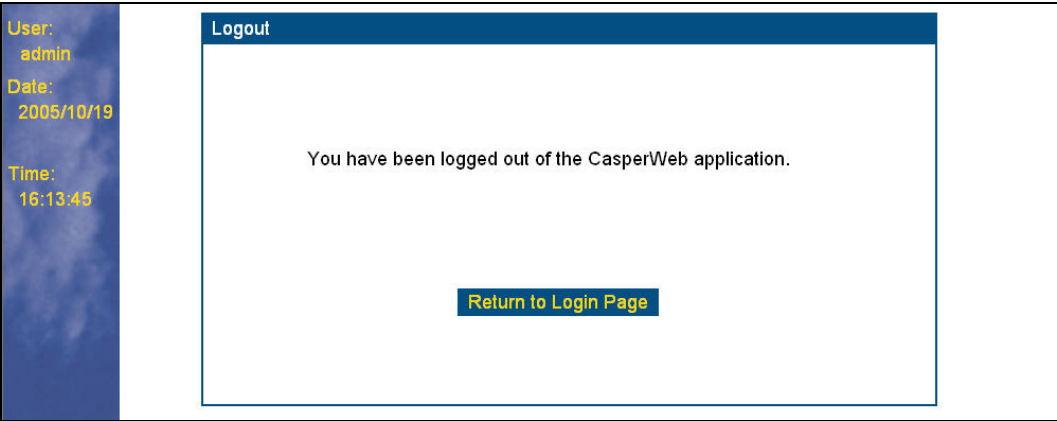


Figure 2-5 Log out message

Navigation in CasperWeb

The Main menu links to screens offering CasperWeb functions. Click on a menu link to open its screen. Screens contain a standard set of function buttons (see Table 2-1: Function Buttons in CasperWeb). Click the button to obtain the response shown in the table.

Table 2-1: Function Buttons in CasperWeb

Button	Function
Add	Adds a record of the specified type.
Back	Returns to the previously displayed screen (not necessarily the Main menu; to go to the Main menu, click on Main in the yellow menu bar at the top of each screen).
Create New	Creates new product code.

Button	Function
Create Product	Creates new product record with details you enter from the Product Wizard screen.
Delete	Deletes the specified record.
Done	Completes the creation of an added record.
Edit	Displays a detailed editing window for the applicable topic.
Find Serial/Name/Invoice	From the Customer Information screen, allows you to search for a customer record based on the serial number, customer name or invoice number.
Generate	Generates various reports from the Reports menu.
History	Searches on Serial Numbers, based on specified selection criteria.
Next	Advances to the next record (by alphanumeric sequence) of the type currently displayed.
Prev	Returns to the previous record (by alphanumeric sequence) of the type currently displayed.
Site Key Gen	Manual Site Key Generator.
Submit	Updates information within an existing Family, Product, Product Version, Executable, Executable Version, or License Type record.
Update	Updates information within an existing Product Code or Customer Information record.

SECURITY CONSIDERATIONS

CasperWeb is a secure application. Communication can be set up to be sent using HTTPS, so that no one else can decrypt and view the contents of the page.

Error Messages

If you attempt an operation that is not permitted in CasperWeb, the system displays an error pop-up window such as the following:



Figure 2-6 Installation from Download password

Try to interpret the error message and determine what action is necessary. If you have input an invalid value, click **Back to Previous Page** to refresh the screen where the error most likely occurred. Then correct the error and try your action again.

If you can't determine the reason for the error message, please take a screenshot of the screen and email it to support@crypkey.com with your company name and customer service number for analysis.

Occasionally CasperWeb will display an exception error message, which looks like this:

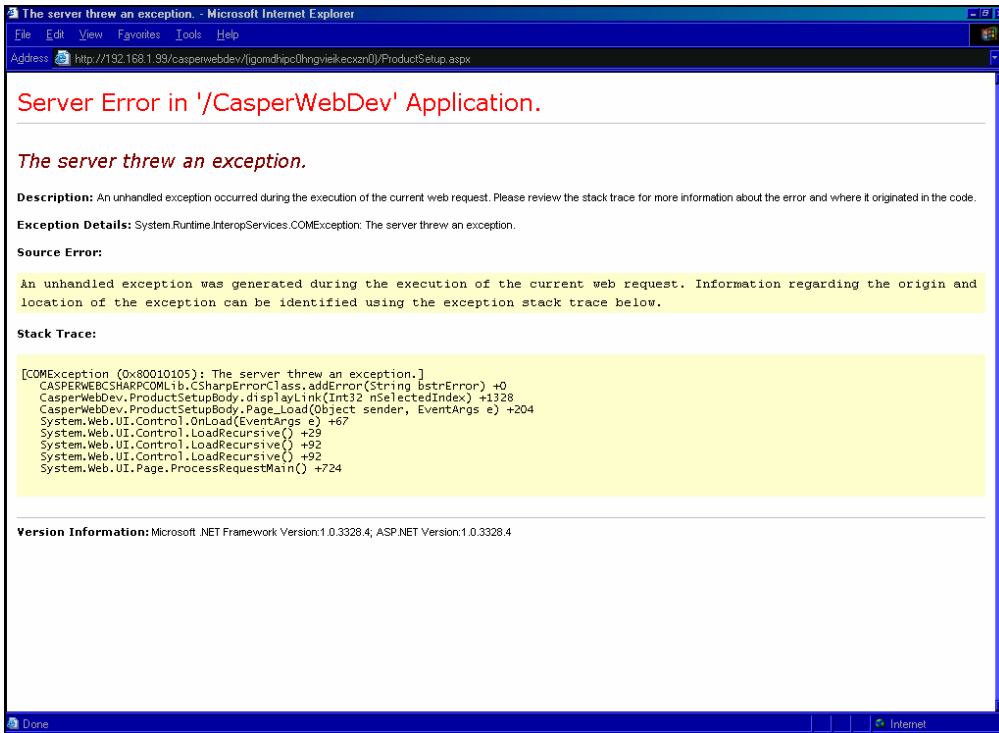


Figure 2-7 Exception Error message

Note: The appearance of the above window is no cause for alarm. The CasperWeb interface has simply timed out. There will be no loss of data. You need to return to the Login window and log in again.

If any exception screen appears consistently, we suggest that you take a screenshot of the screen and email it to support@crypkey.com with your company name and customer service number.

Chapter 3: Managing Products

Before you can process customer orders or issue software licenses, you need to know how to manage products.

In this chapter you will find information about:

- product information -- what a product consists of
- how to set up product codes
- how product codes are associated with Serial Numbers

Set Up Products

This section describes how to enter product information using the Product submenu options accessed from the Main menu.

Your product information must be entered into CasperWeb before you can process customer orders or issue licenses. Product information includes:

- Family (see *Add Product Information* below) — the overall product category
- Product (see *Add Product Information* below) — the product name, number, and description
- Product Version (see *Add Product Information* below) — the name and number of the product release
- Executable (see *Add Executable ID* on page 93) — the executable name and description
- Executable Version (see *Add Executable Version* on page 98) — the name and number of the executable release
- License Type (see *Define License Types*) — the name and description of the license type
- Product Code (see *Add Product Codes*) — a unique alphanumeric code representing a product and its executable and License Type.

Note: The Product Code is not the same as the product. The product is the name of your product/application; the Product Code represents a unique relationship between a product, and product information such as the executable file and licenses. A product may have more than one Product Code, in order to represent more than one licensing option for that product.

You can query, add, modify, and delete the above information using the Product menu group that is accessible from the Main menu screen.

Note: The Product Number, Executable name, and Executable password must **not** be changed from the original information in the developer keys. Developer keys are specific to your company and product. Your company received the developer keys from CrypKey when you completed your evaluation of CrypKey Instant or CrypKey SDK. These keys do not change. Consequently, to make possible the continued licensing of the product, the three values on which the keys are based – the Product number, the Executable name, and the Executable password – must also never change.

ADD PRODUCT INFORMATION

Procedure

This section describes how to add one or more families, products and product versions to CasperWeb. You add products and product families via the Product submenu, Family and Product option.

Before you set up individual products in CasperWeb, there must be **at least one family (category) associated with the products**. The **Family** field in the Add Product screen is used to create and maintain records defining product families. You do not have to create a family if you use the Product Setup Wizard--it creates a default family for you.

1. Go to the Main menu (see Log on to CasperWeb on page 68).
2. Under the Product submenu, click **Family and Product**. The Family and Product screen displays (see Figure 3-1 Family and Product screen).
3. Beside the **Family** box, click **Add** to add a new record, or **Edit** to modify an existing record. In this example we will be adding a new family of products.

Main **Help** **Logout**

Family and Product

Family
CRYPKEY DEM ▼ **Edit** **Add**

Product
DEMO PRODU ▼ **Edit** **Add**

Product Version
1 ▼ **Edit** **Add**

Back

Click Add.

Figure 3-1 Family and Product screen

4. CasperWeb displays the Add Family screen:

The screenshot shows a web application interface. At the top is a yellow navigation bar with the links 'Main', 'Help', and 'Logout'. Below this is a large white content area. Inside the content area is a blue-bordered box titled 'Add Family'. Within this box, there are two input fields: 'Family' (a single-line text box) and 'Description' (a multi-line text box). At the bottom of the 'Add Family' box, there are two buttons: 'Add' and 'Back'.

Figure 3-2 Add Family screen

5. Enter your data. The screen below shows an example:

Figure 3-3 is a screenshot of the "Add Family" screen in CasperWeb. The screen features a yellow header bar with "Main", "Help", and "Logout" links. Below the header is a blue bar with the title "Add Family". The main content area has two labels: "Family" and "Description". The "Family" label is next to a text input field containing the word "Basic". The "Description" label is next to a larger text input field containing the text "Base software package". Below these fields are two buttons: "Add" and "Back". An arrow points from the text "Enter family name and description." to the input fields. Another arrow points from the text "Click Add." to the "Add" button.

Figure 3-3 Add Family – example

6. Click **Add**. If the action was successful, CasperWeb displays a message at the bottom of the Add Family screen:

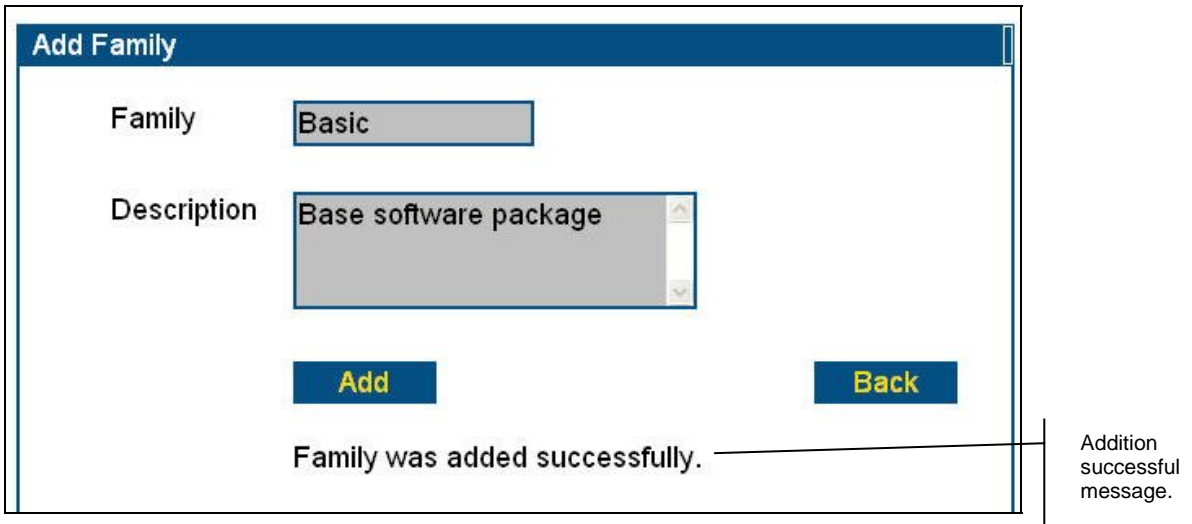


Figure 3-4 Add Family message

7. Click the **Back** button to return to the Family and Product screen (see Figure 3-1 Family and Product screen)
8. Now you will add a product to the product family.

Note: A product can be associated with only one product family. Once a product has been associated with a product family, that relationship cannot be modified. To change the association, you must delete the product record, then recreate it and associate it with another product family. (See Modify Product Information on page 86.) You cannot delete a product if a Serial Number has been associated with it.

9. From the drop-down menu beside the **Family** box, select the family you want to add the product to (i.e. the family you added in the previous step):

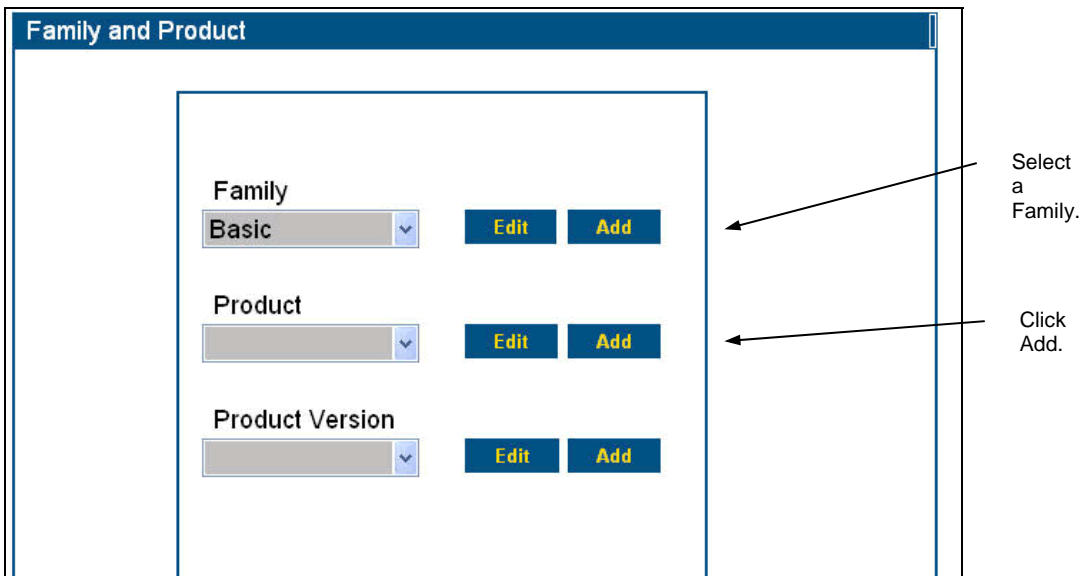


Figure 3-5 Select a Family and add a Product

10. Click **Add** beside the Product box. The Add Product screen displays:

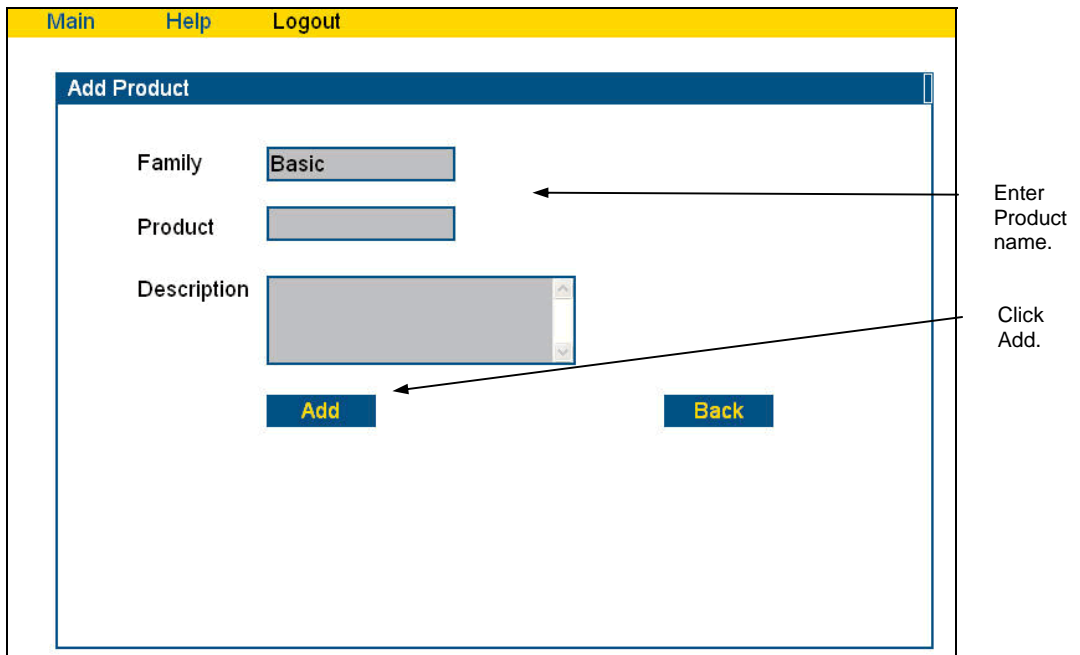


Figure 3-6 Add Product screen

11. Enter the name of the product in the **Product** box.

12. Enter a description of the product (optional).
13. Click **Add**. If the action was successful, CasperWeb displays a message at the bottom of the Add Product screen:

The screenshot shows a web form titled "Add Product" with a blue header bar. Below the header, there are three input fields: "Family" with the value "Basic", "Product" with the value "eCommerce Suite", and "Description" which is empty. Below these fields are two buttons: "Add" and "Back". At the bottom of the form, a message states "Product was added successfully." An arrow points from the "Back" button to this message. To the right of the form, outside the main container, is the text "Successful addition message." with an arrow pointing to the success message.

Figure 3-7 Add Product successful message

14. Click the **Back** button to return to the Family and Product screen (see Figure 3-1 Family and Product screen).
15. Now you will add the version of this product.

Note: You can set up any number of versions of a product.

16. Click **Add** beside the **Product Version** box. The Add Product Version screen displays:

Add Product Version

Family

Product

Prod Version

Prod Number

Description

Product version required.

Product Number required.

Add **Back**

Figure 3-8 Add Product Version screen

17. You must enter both the Product Version and Product Number. If you click **Add** without first entering the Product Version, you will get an error message similar to the following:

The screenshot shows a web form titled "Add Product Version". It contains five input fields: "Family" (with "Basic" selected), "Product" (with "eCommerce Suite" selected), "Prod Version" (empty), "Prod Number" (empty), and "Description" (a large text area). Below the fields are two buttons: "Add" and "Back". A message "Please enter the Product Version." is displayed below the "Add" button. Two arrows point from external text to the form: one points to the "Prod Version" field with the text "Enter Product Version (alpha-numeric).", and the other points to the error message with the text "Product version required message."

Add Product Version

Family

Product

Prod Version

Prod Number

Description

Add **Back**

Please enter the Product Version.

Enter Product Version (alpha-numeric).

Product version required message.

Figure 3-9 Add Product Version message

18. Enter the Product Version.

19. If you now click **Add** without first entering the Product Number, you will an error message similar to the following:

The screenshot shows a web form titled "Add Product Version". The form contains the following fields and controls:

- Family:** A text box containing "Basic".
- Product:** A text box containing "eCommerce Suite".
- Prod Version:** A text box containing "Release 2a".
- Prod Number:** An empty text box. An arrow points from the error message to this field.
- Description:** A large text area.
- Buttons:** "Add" and "Back" buttons.

Below the buttons, a message reads: "Please enter the Product Number, an integer (1 to 254)." An arrow points from the "Product Number required message." label to this message.

Annotations on the right side of the form:

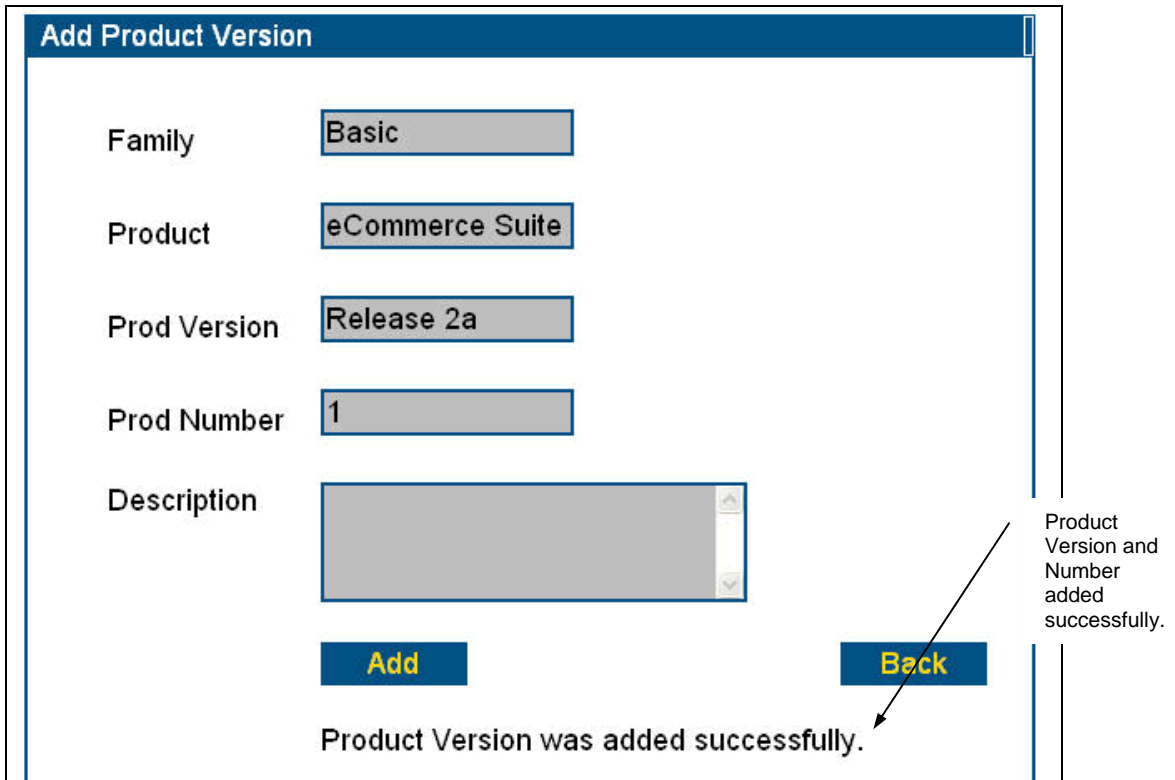
- "Product Number required." with an arrow pointing to the empty "Prod Number" field.
- "Product Number required message." with an arrow pointing to the validation message below the buttons.

Figure 3-10 Add Product Number message

20. Enter the Product Number.

Note: The Product Number refers to the product ID you were given when you received your developer keys for CrypKey Instant or CrypKey SDK.

21. If the action was successful, CasperWeb displays the following message:



Add Product Version

Family

Product

Prod Version

Prod Number

Description

Product Version was added successfully.

Product Version and Number added successfully.

Figure 3-11 Add Product Version and Number message

22. Click **Back** to return to the Family and Product screen.
23. CasperWeb allows you to add any number of product versions to a single product. Therefore, you may want to add more versions to the product(s) you previously entered.
24. Continue adding families and product information until you have added all the products and product categories you wish to store in the Casper database for processing and maintenance.

MODIFY PRODUCT INFORMATION

You can modify the description of a product or the product number. To modify product information, follow the steps below.

Note: You can only edit a Family if there is no Product Code yet associated with it.

Procedure – Modify Product Description

In this example, we will modify the description of a product:

1. Go to the Family and Product screen (see Add Product on page 76 for navigation instructions).

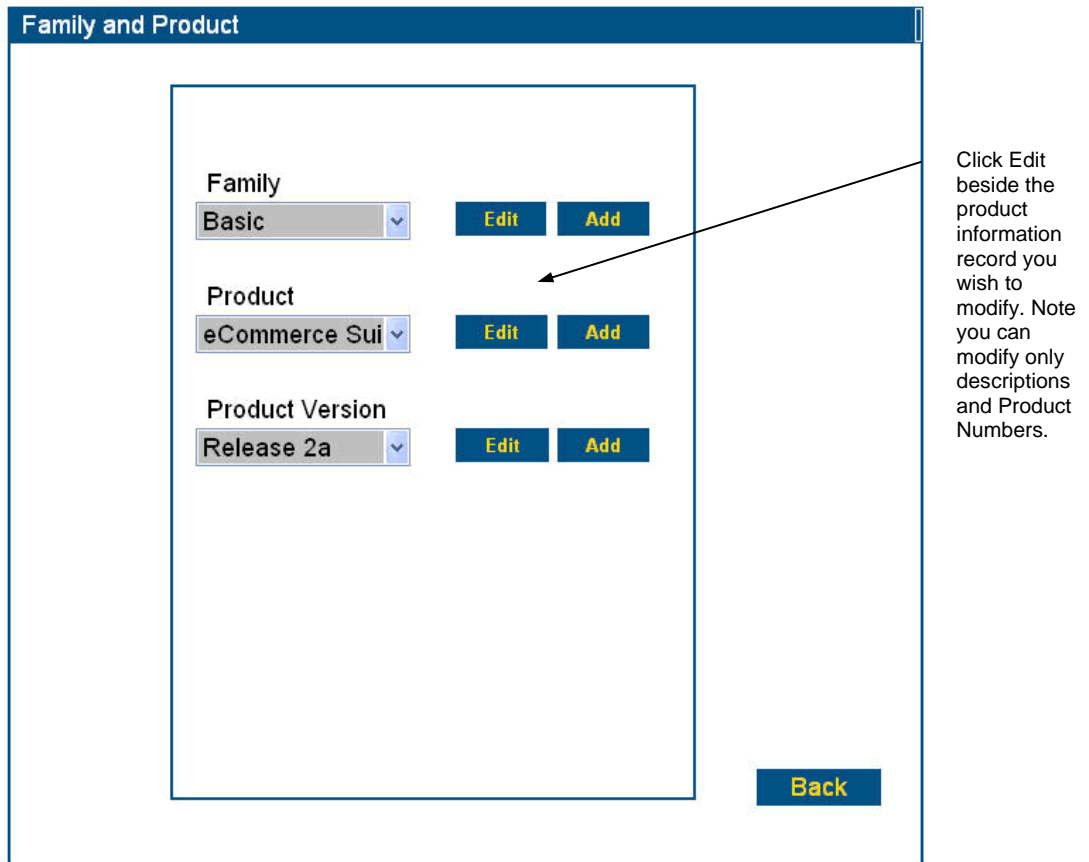


Figure 3-12 Edit Product description

2. Click **Edit** beside the Product box. The Edit Product screen displays:

The screenshot shows the 'Edit Product' interface. It has a title bar 'Edit Product' in a dark blue header. Below the header, there are three input fields: 'Family' with a text box containing 'Basic', 'Product' with a dropdown menu showing 'eCommerce Sui', and 'Description' with a large text area. Below these fields are four buttons: 'Submit', 'Add', 'Delete', and 'Back'. The 'Submit' button is highlighted with a yellow border. Two arrows point from text annotations on the right to the interface: one points to the 'Description' text area with the text 'Modify or enter the description.', and the other points to the 'Submit' button with the text 'Click Submit.'

Modify or enter the description.

Click Submit.

Figure 3-13 Edit Product screen

3. Modify or enter the description.
4. Click **Submit**. CasperWeb will save the changes in the record, and display a product information update message similar to the following:

The screenshot shows a web form titled "Edit Product". It contains three input fields: "Family" with the value "Basic", "Product" with a dropdown menu showing "eCommerce Sui", and "Description" with the text "Suite for maintaining small business websites." Below these fields are three buttons: "Submit", "Add", and "Delete". To the right of the "Submit" button is a "Back" button. At the bottom of the form, a message states "Product information was updated successfully." An arrow points from this message to the text "Successful update message." on the right side of the image.

Figure 3-14 Product description updated message

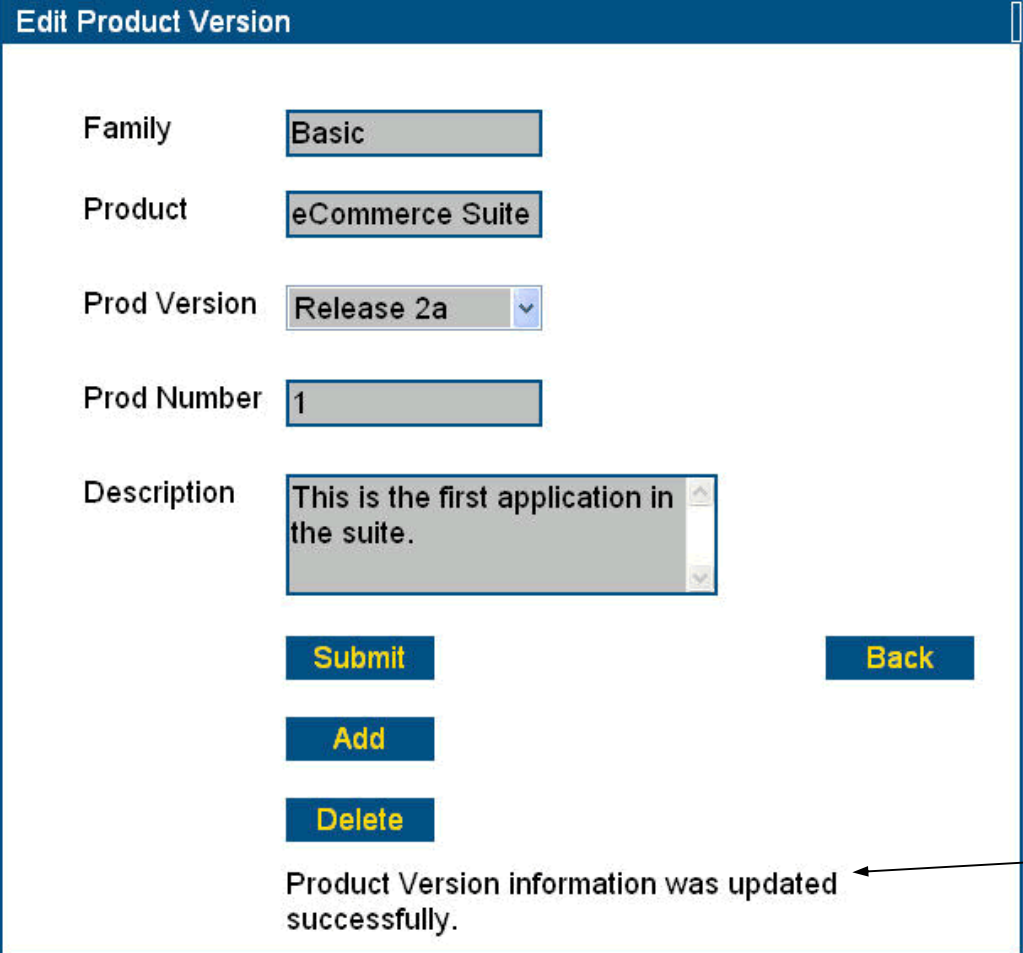
5. Click **Back** to return to the Family and Product screen.

Procedure – Modify Product Version

1. From the Family and Product screen, select the Family.
2. Select the Product.

Note: All products for the selected family will be listed in the drop-down menu for the Product, in alphabetical order.

3. Select the Product Version to edit.
4. Click **Edit** beside the Product Version field.
5. Modify the Product Number or description.
6. Click **Submit**. CasperWeb displays a successful update message similar to the following:



The screenshot shows a web form titled "Edit Product Version". The form contains the following fields and controls:

- Family:** A text box containing "Basic".
- Product:** A text box containing "eCommerce Suite".
- Prod Version:** A dropdown menu with "Release 2a" selected.
- Prod Number:** A text box containing "1".
- Description:** A text area containing "This is the first application in the suite." with up and down arrow icons on the right.

Below the form fields are three buttons: "Submit", "Add", and "Delete". To the right of the "Submit" button is a "Back" button.

At the bottom of the form, a message states: "Product Version information was updated successfully." An arrow points from this message to the text "Successful update message." on the right side of the image.

Figure 3-15 Product Number Description updated

Note: You could have also modified the Product Number in the example above.

7. Click **Back** to return to the Family and Product screen.

DELETE PRODUCT INFORMATION

Use the following method to delete any of the product-related information (Family, Product, Prod Version, Prod Number, Description).

Note: You cannot delete a product record at the Family level without first deleting its child dependencies (i.e. products). If you attempt to do so, you will see the following error message:

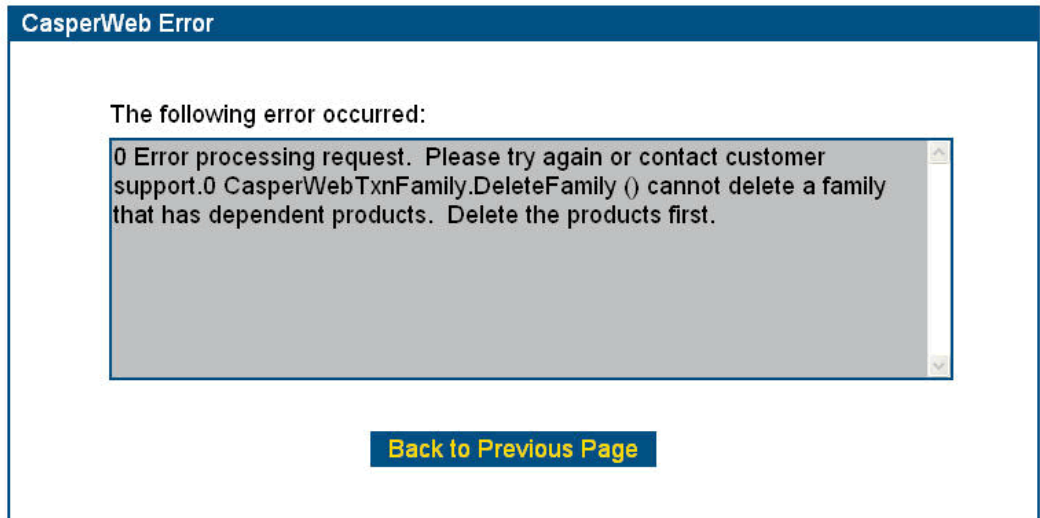
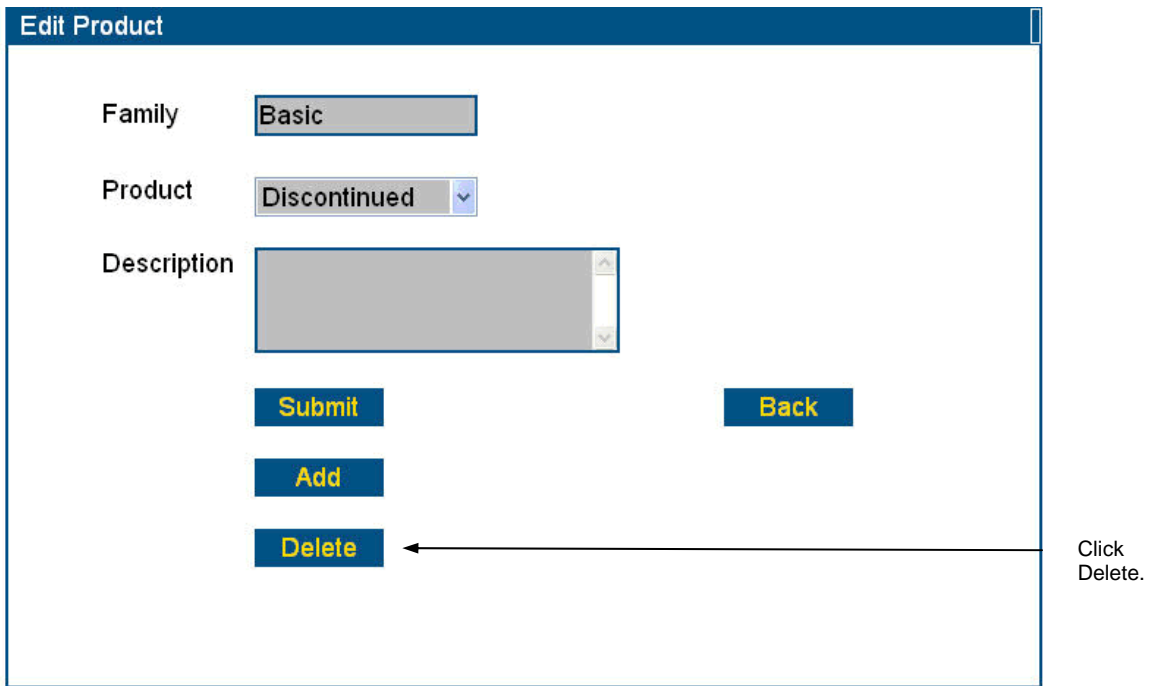


Figure 3-16 Invalid Deletion message

In the example below we will delete a product, “Discontinued”, from the Family “Basic”.

Procedure – Delete Product Information

1. Go to the Family and Product screen (see Add Product on page 76 for navigation instructions).
2. Select the Family you wish to delete from the drop-down menu in the Family box (in this case, “Basic”).
3. Click **Edit**. The Edit Product screen displays:



The screenshot shows the 'Edit Product' window. It contains three input fields: 'Family' with the value 'Basic', 'Product' with a dropdown menu showing 'Discontinued', and 'Description' with an empty text area. Below these fields are three buttons: 'Submit', 'Add', and 'Delete'. An arrow points from the text 'Click Delete.' to the 'Delete' button.

Family

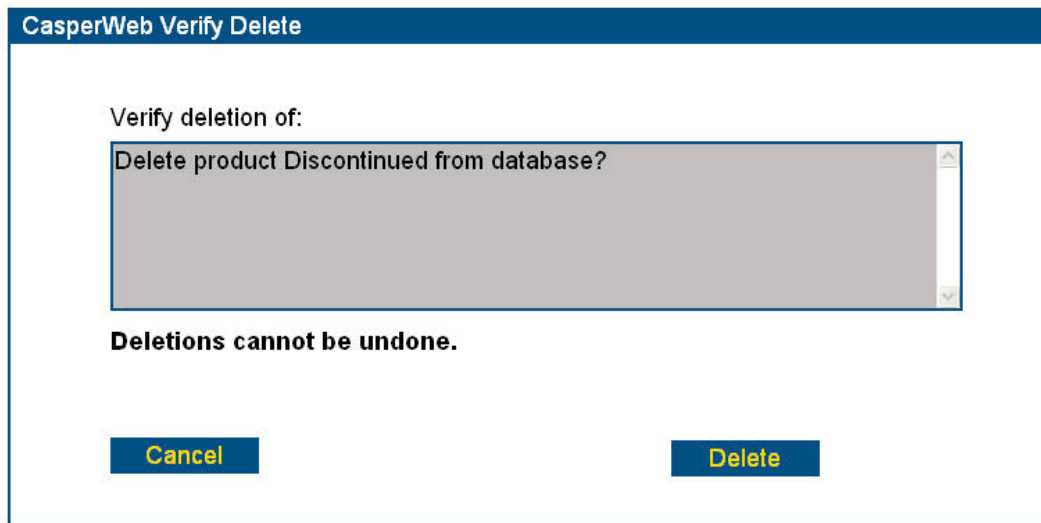
Product

Description

Click Delete.

Figure 3-17 Edit Product screen for deletion

4. Click **Delete**. A message similar to the following displays, asking you to verify the deletion.



The screenshot shows the 'CasperWeb Verify Delete' dialog box. It contains a text area with the message 'Delete product Discontinued from database?'. Below the text area is the text 'Deletions cannot be undone.' and two buttons: 'Cancel' and 'Delete'.

CasperWeb Verify Delete

Verify deletion of:

Delete product Discontinued from database?

Deletions cannot be undone.

Figure 3-18 Verify deletion dialog box

Note: Deletions cannot be undone. Be sure you want to delete the record before proceeding.

5. Click **Delete** to delete the record, or **Cancel** to abort the action. If you delete the information, CasperWeb returns to the Edit Product screen. The product will no longer be listed in the drop-down menu beside the Product field.

Note: You can use the above procedure to delete, for example, a Product Version. The version of the product will no longer exist. However, the Product itself will still be intact (unless it is deleted separately).

Set Up Executables, Options and Levels

This section shows you how to add and configure executables, options and levels. This function is accessed via the Product submenu, Executables, Options and Levels option.

ADD EXECUTABLE ID

In order to license a product, you must assign an executable to that product. To do so, use the Add Product Code function (see

Add Product Codes on page 115). Only one executable can be assigned to a Product Code.

First, you need to set up both an Executable identification (the name of the file) and an Executable Version. Both types of record are required for each Executable.

Procedure – Define an Executable

1. Go to the Main menu (see Log on to CasperWeb on page 68).
2. Under the Product submenu, click on **Executables, Options and Levels**. The Executables, Options and Levels screen displays:

Executable, Options and Levels

Executable
EXAMPLE ▼ **Edit** **Add**

Executable Version
1 ▼ **Edit** **Add**

Levels
none ▼ **Edit** **Add**

Options
Edit **Add**

Back

Click drop-down list to see all defined executables.

Figure 3-19 Executables, Options and Levels screen – Add Executables

3. The drop-down menu for Executables lists any existing executables in alphabetical order. Select the Executable from the list. Click on **Edit** to edit an existing executable, or **Add** to add a new one.
4. In this example we will add an executable. Click **Add**. The Add Executable screen displays:

Add Executable

Executable

File name

Password

Description

Add

Back

Figure 3-20 Add Executable screen

5. Enter the information in the fields as defined in Table 3-1: Executable ID – Data Entry Fields.

Table 3-1: Executable ID – Data Entry Fields

Field	Description
Executable	Name of the executable program. Alphanumeric. Although this can be different from the file name, and does not require a file type extension, we recommend keeping the Executable ID and file name the same.
File name	Name of the executable file as specified to CrypKey when you obtained developer keys for your

Field	Description
	product. Alphanumeric 8.3 format
Password	Enter the password you gave to CrypKey to obtain your product's developer keys.
Description	Description of the executable program.

6. Enter the name you wish to give to the executable. In the example below it's "123bbb".
7. Enter the file name of the executable, in this example, "123bbb.exe".

Note: The file type extension is typically ".exe" but it is not required to be. The filename must be the *exactly the same* as you gave to CrypKey to obtain your developer keys for this product.

8. Enter the executable password.
9. Enter a description (optional).

Note: While the Executable name, file name and password are required to create an executable record, the description can be added later if desired; select the Executable from the drop-down menu in the Executables, Options and Levels screen and click **Edit**.

10. Click **Add** to save the information.

Note: If you try to save the information without entering all of the required information, you will get a message similar to the following (depending on which piece of information is missing: executable name, file name or password):

The screenshot shows a web form titled "Add Executable" with a blue header bar. The form contains four input fields: "Executable" with the value "123bbb", "File name" with the value "123bbb.exe", "Password" which is empty, and "Description" which is a large text area. Below the fields are two buttons: "Add" and "Back". A red error message "The Password must be specified." is displayed below the "Add" button. An arrow points from the text "Password is required." on the right side of the form to the error message.

Add Executable

Executable

File name

Password

Description

Add **Back**

The Password must be specified.

Password is required.

Figure 3-21 Password required message

11. If the action is successful, you will see a message similar to the following:

Add Executable

Executable

File name

Password

Description

Add **Back**

Executable was added successfully.

Executable added message.

Figure 3-22 Executable added successfully message

ADD EXECUTABLE VERSION

As well as being assigned to an Executable, a Product Code must also reference an Executable Version.

Procedure – Define an Executable Version

1. Go to the Executables, Options and Levels screen (see the procedure *Add Executable ID* on page 93).
2. The drop-down menu for Executable versions lists any existing executable versions in alphabetical order. Click on **Edit** to edit an existing version, or **Add** to add a new one.
3. In this example we will add a version. Click **Add**. The Add Executables Version screen displays:

Add Executable Version

Executable

123bbb

Exec Version

RTT Num

Description

Add

Back

Figure 3-23 Add Executable Version screen

4. Enter the Executable Version information in the fields as defined in Table 3-2: Executable Version -- Data Entry Fields.

Table 3-2: Executable Version -- Data Entry Fields

Field	Description
Executable	Name of the executable program. This was previously entered and cannot be changed (other than by deletion and re-entry).
Exec version	Name of the version of the executable. Alphanumeric; max. 13 characters. Samples of valid input: 1, 1.0, one

Field	Description
RTT Num	Currently not used; however you can record CrypKey's RTT number in this field.
Description	Enter an alphanumeric description of the executable version (optional).

5. Enter the Executable Version.
6. Enter the description (optional). The description can also be added later by clicking the **Edit** button opposite the Executable Version field.
7. Click **Add**. You will see a message similar to the following:

Add Executable Version

Executable

123bbb

Exec Version

1.3

RTT Num

Description

Add

Back

Executable Version was added successfully.

Figure 3-24 Executable Version Added message

8. Click **Back** to return to the Executables, Options and Levels screen.

ADD OPTIONS AND LEVELS

The Product Options and Levels function is used to define or activate features that you want to release with an Executable. Since an Executable record is linked to a product record, options and levels specified for the Executable apply to the product. The license issued to the customer for that Product Code will incorporate the defined Product Codes' options and levels by default when issuing a license. Options and Levels can be modified at the time of Serial Number creation or Site Key generation.

Options and Levels give you flexibility in defining various features of an application for distribution in packages or specific configurations. You don't have to use Options and Levels when creating Serial Numbers or issuing Site Keys. **However, if you do use them, you must set them up using the Product Options and Levels function before associating them with a Product Code, in a Serial Number record, or in the Site Key Generator.**

An Option is a single binary digit — either 0 or 1 — which denotes whether a particular function is available or not. For example, if your product has multiple components and you want your customers to pay per component, you can use Options to specify that only the components ordered by a customer are activated for that customer.

In the Product Options and Levels function, you define the key types of Option information:

- bit position: the placement of the bit in a binary string. For example, the first position in the string might reference a certain report-generating capability of your application.
- the value assigned to each bit position. The value 1 at a given position would mean the Executable is enabled to perform the function defined at that position (e.g., generating certain reports). The value 0 would mean this feature is turned off.

A Level is a number that controls a variety of features in your product. For example, you might define the following levels:

- Level 0: no additional modules can be used
- Level 1: the graphic module can be used
- Level 2: the graphic and printing modules can be used

Levels can also be used for version control. For example, you might decide that the first version (v1.0) of your software runs regardless of level, while v1.1 requires Level 1, v1.2 is not released, v1.3 requires Level 2, and so forth.

Each Executable can have an indefinite number of Levels defined for it. However, for any given transaction (i.e., Customer Information updates or Site Key generation), only one Level can be assigned to an Executable.

When authorizing a product using Casper (automatically) or the Site Key Generator (manually), you must provide a setting (“on” or “off”) for all options defined for the product (i.e., checked = on, unchecked = off).

In order for an Executable to recognize a Level or the Options defined in CasperWeb, the client application needs to implement programming to decode the oplevel value received from the license. If this isn’t implemented, the restrictions that you specify in CasperWeb will not be recognized by the program.

For more details about the mechanisms of options and levels, see *Appendix A: Technical References, Internal Handling of Levels and Options*.

Procedure – Add a Level

1. Go to the Executables, Levels and Options screen (see the procedure *Add Executable ID* on page 93):

The screenshot shows a web interface titled "Executable, Options and Levels". It contains four main sections: "Executable", "Executable Version", "Levels", and "Options". Each section has a text input field, a dropdown menu, and "Edit" and "Add" buttons. The "Executable" field contains "EXAMPLE". The "Executable Version" field contains "1". The "Levels" field contains "none". The "Options" field is empty. A "Back" button is located at the bottom right. Two arrows point to the "Levels" section: one to the dropdown menu with the text "Click drop-down list to see all defined levels." and another to the "Add" button with the text "Click Add."

Executable, Options and Levels

Executable
EXAMPLE Edit Add

Executable Version
1 Edit Add

Levels
none Edit Add

Options
Edit Add

Back

Click drop-down list to see all defined levels.

Click Add.

Figure 3-25 Executables, Options and Levels screen – Add Levels

2. The drop-down menu for Levels lists the existing Levels in alphabetical order. Click on **Edit** to edit an existing level, or **Add** to add a new one.
3. In this example we will add a level. Click **Add**. The Add Level screen displays:

Add Level

Executable 123bbb

Exec Version 1.3

Level

Level Number

Description

Add **Back**

Enter the Level, Level Number and Description (optional).

Click Add.

Figure 3-26 Add Levels screen

4. Enter the information as per Table 3-3: Levels -- Data Entry Fields:

Table 3-3: Levels -- Data Entry Fields

Field	Description
Executable	Name of the executable program. This was previously entered and cannot be changed (other than by deletion and re-entry).
Exec version	Name of the version of the executable. This field cannot be edited from this screen.
Level	A number that controls a variety of features in your product, or for version control (see above in this section for more information). Format:

Field	Description
	alphanumeric (e.g. Regular, Lite1).
Level number	Required with Level. Format: an integer greater than 0.
Description	Enter an alphanumeric description of the level (optional).

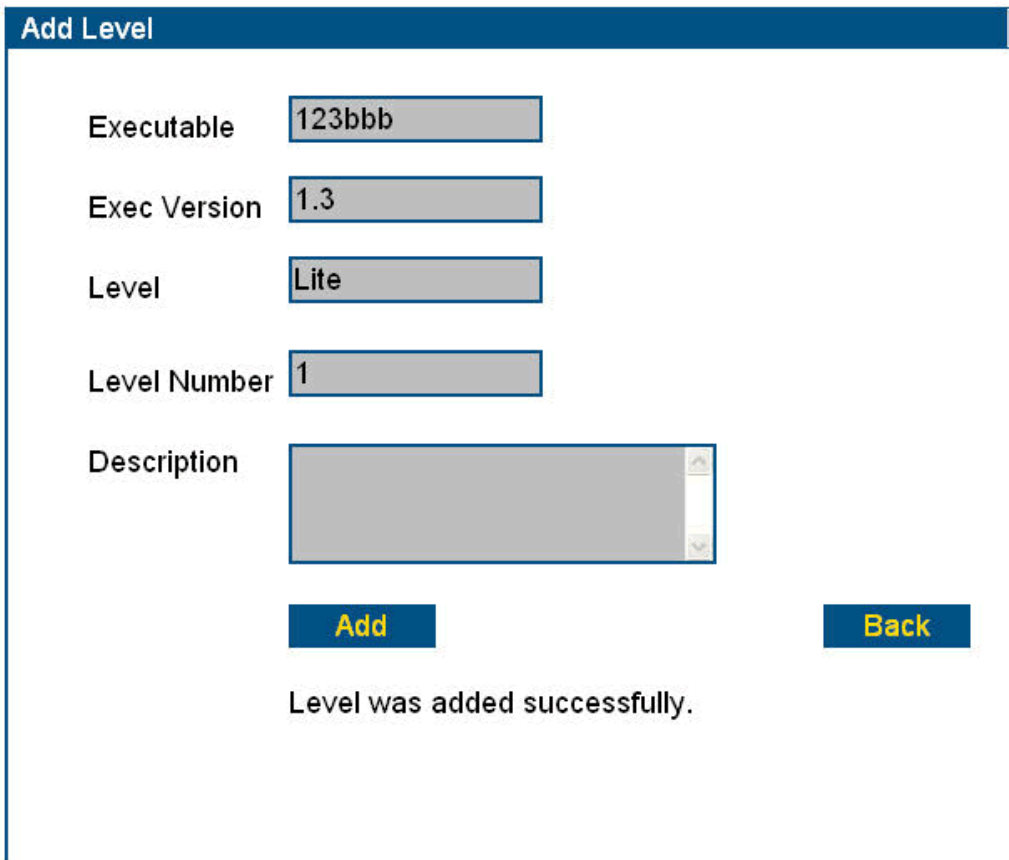
5. In the Level box, enter the name of the new level.
6. In the Level Number box, enter the number of the new level.

Note: Both the level name and number must be entered; otherwise, CasperWeb will display a reminder message.

7. Enter the description (optional).

Note: The description can be added later by clicking the **Edit** button next to the Levels box in the Executables, Options and Levels screen.

8. Click **Add**. If the action was successful, CasperWeb displays a message similar to the following:



The screenshot shows a web form titled "Add Level" with a blue header bar. The form contains five input fields: "Executable" with the value "123bbb", "Exec Version" with "1.3", "Level" with "Lite", "Level Number" with "1", and "Description" which is an empty text area. Below the fields are two buttons: "Add" and "Back". At the bottom of the form, a message states "Level was added successfully."

Figure 3-27 Level added message

9. A quick way of verifying your additions or changes is to go back to the Executables, Options and Levels screen and display the drop-down list of Levels. Check that your new Level is in the drop-down list of Levels.

Procedure – Add Options

1. Go to the Executables, Levels and Options screen (see the procedure *Add Executable ID* on page 93):
2. Select the Executable/Executable Version you want. The Level does not have to be defined. Any existing Options are listed in the Options box on this screen. You define the options here, but not which options will be used.

Executable, Options and Levels

Executable
EXAMPLE Edit Add

Executable Version
1 Edit Add

Levels
none Edit Add

Options
Edit Add

Back

Select Executable/ Executable Version desired, and Level if defined.

Click Add.

Figure 3-28 Executables, Options and Levels screen – Add Option

3. Click on **Edit** to edit an existing level, or **Add** to add a new one.
4. In this example we will add an option. Click **Add**. The Add Option screen displays:

Add Option

Executable

Exec Version

Option

Option Bit

Description

Add **Back**

Enter the Option, Option Bit and Description (optional).

Click Add.

Figure 3-29 Add Option screen

5. Enter the option information in the fields as defined in Table 3-4: Options – Data Entry Fields:

Table 3-4: Options – Data Entry Fields

Field	Description
Option	Name of the Option associated with the executable; alphanumeric.
Option Bit	Required but not necessarily in use. If it is used, it must have been previously set up in CrypKey SDK or CrypKey Instant or it won't have any effect in

Field	Description
	CasperWeb. You must specify the option name and the option bit used for that option.
Description	Enter an alphanumeric description of the Option (optional).

6. Enter the Option name.
7. Enter the Option bit.
8. Enter the Option description (optional).
9. Click **Add**. If the action was successful, CasperWeb displays a message similar to the following:

Add Option

Executable: 123bbb

Exec Version: 1.3

Option: Module 1 and 2

Option Bit: 1

Description: Licenses only modules 1 and 2 of the Lite version.

Add **Back**

Option was added successfully.

Option, option bit and description are added.

Click Add.

Option added message.

Figure 3-30 Option added message

10. Click the **Back** button to return to the Executables, Options and Levels screen. A quick way of verifying your additions or changes is to verify that they appear in the list of Options:

Executable, Options and Levels

Executable
123bbb

EditAdd

Executable Version
1.3

EditAdd

Levels
Lite

EditAdd

Options

1 Module 1 and 2

EditAdd

Check that option has been added.

Back

Figure 3-31 New Option is listed

DEFINE LICENSE TYPES

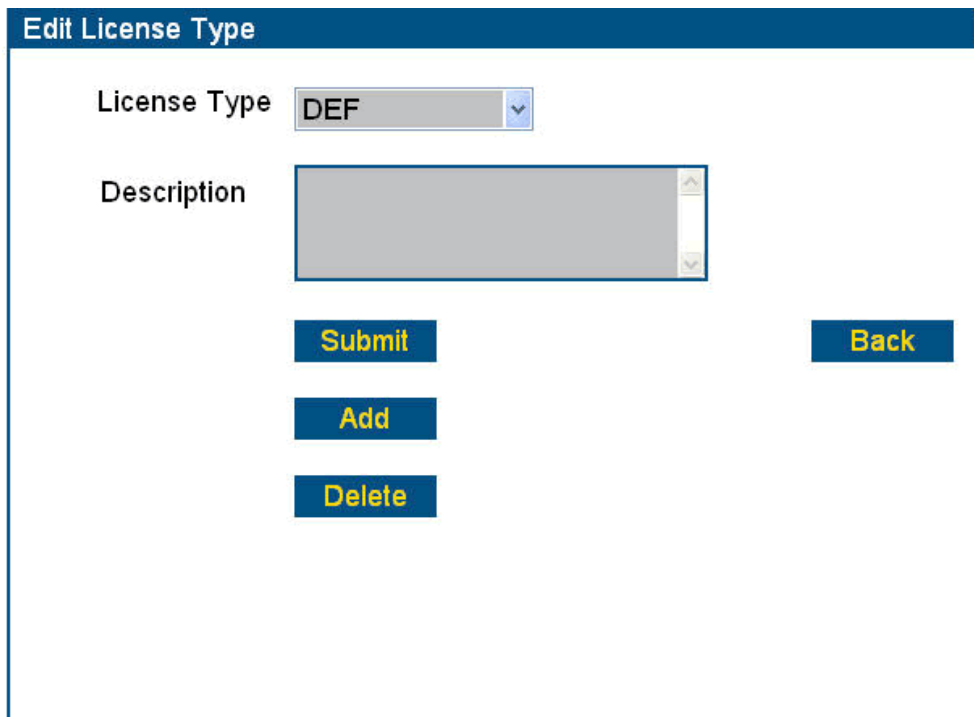
The License Type is a unique three-character value. It's used by Casper for two purposes:

- a. to define a default type of product license you could issue. You do not need to specify a license type when using the Product Code Setup Wizard; however, when using the Product Code Browser, you must specify a license type.
- b. at least one license type must exist in order for you to issue a product license. By default the DEF license type is used with a restriction of three licenses. If you want to use a different license restriction limitation, you can either create a new license type or re-define the restrictions for DEF.

ADD A LICENSE TYPE

Procedure:

1. From the Main menu, click on the Product menu link, License Type. The License Type screen displays:



The screenshot shows a web application window titled "Edit License Type". Inside the window, there is a form with two primary fields. The first field, labeled "License Type", is a dropdown menu currently displaying "DEF". The second field, labeled "Description", is a large, empty text area. Below these fields, there are four buttons arranged in a vertical stack on the left: "Submit", "Add", and "Delete". To the right of the "Submit" button, there is a "Back" button.

Figure 3-32 Edit License Type screen

2. Click on the drop-down arrow beside **License Type** to see a list of existing license types. DEF is a CrypKey-supplied default. You may use this, edit it, or create your own type of license.
3. To add a new License Type, click **Add**. The Add License Type screen displays.
4. Enter an abbreviation or code for this type of license, in the format X3. See the example below:

Add License Type

License Type

Description

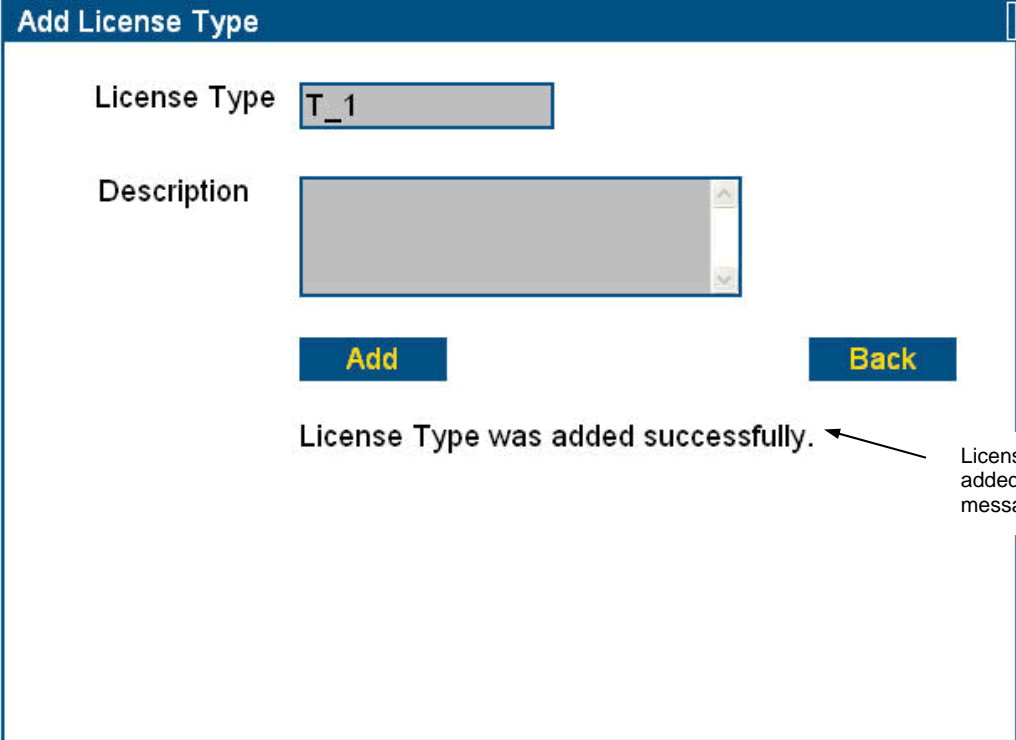
Add **Back**

Add the license type.

Click Add.

Figure 3-33 Add License Type screen

5. Click **Add**. You should see a message similar to the following:



The screenshot shows a web form titled "Add License Type" with a blue header bar. Below the header, there are two input fields: "License Type" with the text "T_1" and "Description" with a large empty text area. Below these fields are two buttons: "Add" and "Back". At the bottom of the form, a message states "License Type was added successfully." with an arrow pointing to it from the text "License added message." on the right side of the form.

Figure 3-34 License Type added message

6. Click **Back** to return to the Edit License Type menu.
7. To edit the description, select it from the License Type drop-down list.
8. Enter the description.
9. Click **Submit**. You will see a message similar to the following:

The screenshot shows a web application window titled "Edit License Type". Inside the window, there is a form with two fields: "License Type" with a dropdown menu showing "T_1", and "Description" with a text area containing "Regular license". Below the form are three buttons: "Submit", "Add", and "Delete". To the right of the "Submit" button is a "Back" button. At the bottom of the window, a message states "License Type information was updated successfully." An arrow points from this message to the text "License type updated message." located outside the window to the right.

Figure 3-35 License Type updated successfully message

ADD PRODUCT CODES

You may add Product Codes using either the Product Code Browser or the Setup Wizard. We recommend beginning with the Setup Wizard, as it is simpler. If you need more than one Product Code for any single application, you must enter the rest of the Product Codes manually using Product Code Browser. You can also modify existing Product Code licensing information through the Browser.

Notes about Product Codes:

- It is necessary to create a minimum of one Product Code for each product.
- Every Serial Number must be associated with a Product Code (see *Add Customer Information* on page 63).
- A Product Code allows you to associate specific instances of Product Family, Product, Product Version, Executable, Executable Version, and (optionally) License Type, Level, and Options. This information must already be defined in the system before you can create a Product Code;

otherwise CasperWeb generates an error message, and you will need to enter the missing items.

Note: Once you have defined a relationship between certain product information using a Product Code, you cannot use the same combination of information with another Product Code.

PRODUCT SETUP WIZARD

The Product Setup Wizard is a quick way to set up the following product details: Executable file name, Password and Product Number.

Procedure – Add Product Codes using the Setup Wizard

1. From the Main menu (see Figure 1-1 CasperWeb Main Menu), click on Setup Wizard in the Product submenu. The Product Setup Wizard screen displays, with the defaults. You will replace the defaults with your own data.

Product Setup Wizard

The product setup wizard is an easy way to set up your product using the minimum amount of information.

Executable name

Password

Product Number

Please use the information that you sent to CrypKey when obtaining your developer keys.

Product Code to Create

This is a new name that you use to track this product in Casper. If you're unsure what to use, leave this as the default (MyProduct).

Create Product **Back**

Figure 3-36 Setup Wizard screen – defaults

2. Enter the information as shown in Table 3-5: Product Setup Wizard -- Data Entry Fields:

Table 3-5: Product Setup Wizard -- Data Entry Fields

Field	Description
Executable name	Name of the executable program. We recommend using the filename format (8.3) and keeping the executable name the same as the filename. This executable name must be the filename specified to CrypKey when developer keys were generated for the product. If this is not identical the authorization for that Product Code will not work.
Password	Enter the password you gave to CrypKey to obtain your product's developer keys initially. Alphanumeric.
Product Number	The Product Number refers to the product ID you were given when you received your developer keys for your product. Integer.
Product Code to Create	The Product Code is a unique code. It is used to assign a set of associations among Family, Product Name, License Type, Product Version, Executable Name, Executable Version, Level (optional), and Options (optional) via the Product Code Browser feature. Alphanumeric.

3. Enter the executable file name.

Note: This is the name of the file you supplied to CrypKey in order to get your developer keys for your product.

4. Enter the password that you provided to CrypKey to obtain your developer keys.
5. Enter the product number you were given when you received your developer keys for CrypKey Instant or CrypKey SDK.

Note: Although it's not shown on this screen, Casper automatically assigns the default license type of "DEF" to the Product Code you've created. A license type is required in order to create a Product Code. The default number of runs for DEF is 3. You can change this license type to one you create (see *Define License Types* on page 112), and then assign a new license type to the Product Code and executable (see *Product Code Browser* on page 120).

Note: The particular combination of an executable, password, product number and default license type can be used only once. However, the default license type "DEF" can be re-used for other product executables.

6. Click **Create Product**:

Product Setup Wizard Company Number: 0 [Choose](#)

The product setup wizard is an easy way to set up your product using the minimum amount of information.

Executable name

Password

Product Number

Please use the information that you sent to CrypKey when obtaining your developer keys.

Product Code to Create

This is a new name that you use to track this product in Casper. If you're unsure what to use, leave this as the default (MyProduct).

[Create Product](#) [Back](#)

Figure 3-37 Add Product Code using Product Setup Wizard

7. You have now associated a Product Code with an executable. You can also do this through the Product Code Browser function (see the following section).
8. You can then associate the Product Code (and related executable) with a Family, Product, Product Version and License Type (see
9. *Add Product Codes* on page 115).
10. The new Product Code is listed on the Product Code Browser screen:

Product Code Browser

Company Number: 0

Choose

Create New

Back

Product Code	Family	Product	Product Version	Executable	Executable Version	License Type	
mytest10	CrypKey	example	v1	myapp.exe	Version 1	DEF DEFAULT LICENSE	View
TESTING	CrypKey	example	v1	example.exe	1	B01 VELODROME	View

<Prev Next>

New Product Code added.

Figure 3-38 Product Code Browser listing added Product Code

- When you add a customer (see *Add Customer Information* on page 129) you will select a Product Code to be associated with a Serial Number. (Every customer is assigned a unique serial number in order to be authorized.)

PRODUCT CODE BROWSER***Procedure – Add Product Codes using the Product Code Browser***

Note: Before you can create a Product Code through the Browser, you must set up the associated information: Product Family, Product, Product Version, Executable, Executable Version, and License Type. See the applicable sections above.

1. Go to the Main menu.
2. Under the Product submenu, click **Product Code Browser**. The Product Code Browser screen displays:

Note: You can create a basic Product Code quickly using the Setup Wizard. See *Product Setup Wizard* on page 120.

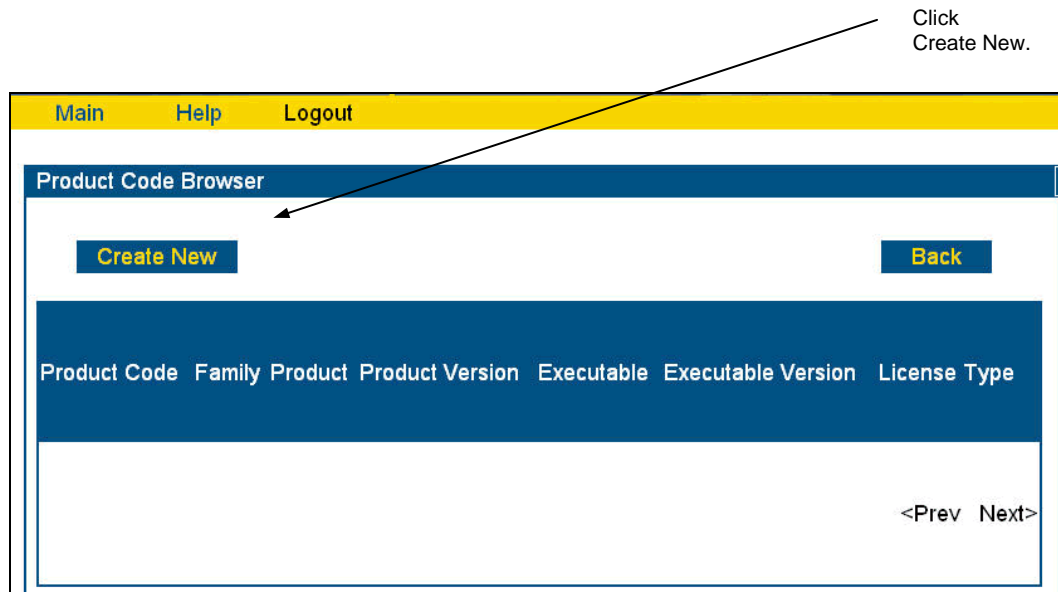


Figure 3-39 Product Code Browser screen

3. Click on **Create New**. Casper displays the following screen:

The screenshot shows a web application interface for adding a product code. The top navigation bar is yellow with links for 'Main', 'Help', and 'Logout'. The main content area has a blue header 'Product Code Add'. The form is organized into several sections: a left column with 'Family' (CRYPKEY DEI), 'Product' (DEMO PRODUCT), and 'Product Version' (1); a right column with 'Executable' (EXAMPLE) and 'Executable Version' (1); a bottom-left section for 'License Type' (DEF DEFAULT); and a bottom-right section with checkboxes for 'EasyLicense' and 'Add On License', a 'Product Code' text field, and 'Create Product Code' and 'Back' buttons.

Figure 3-40 Product Code Add screen

4. Select one or more of the items you wish to associate with a product. Click the drop-down arrow beside the **Family**, **Product**, **Product Version**, **Executable**, or **License Type**. The Executable to be authorized is required, the other fields are optional.
5. EasyLicense is used to apply an unlimited license (no restrictions) to a particular computer. **This will override any other license type for that product.** In order to use EasyLicense, Casper must be able to read a HDSN for the computer (contained in the Site Code). The Customer History screen shows a sample below. EasyLicense is not a license type generally used by Casper, but is available if it meets your company's needs. Call CrypKey Technical Support if you have any questions about this function.

Customer History

Serial Number 123

Date: 2004/08/31 15:07:17 Page 1 of 5

Family: CRYPTKEY DEMO

Product: DEMO PRODUCT

Site Code: 58E8 BCAA 6BF9 E118 59

Site Key: 9C91BD493777E5A4ED0270A42A

Keys Used / Limit: 475 of 99999

Memo:

Prod Version: 1

License Type: DEF

Level: 0

☐ EasyLicense

HDSN: 30057

Restriction Value: 3

☒ Unlimited
☐ Days
☐ Runs
☒ Fixed ☐ Floating

Hard Drive Serial Number.

Default license run restriction.

Figure 3-41 Customer History showing HDSN

6. Add On License is defined in the Add Customer Information screen (see *Add Customer Information* on page 129).
7. In the **Product Code** field, enter the alphanumeric Product Code (which represents the association of this product with the other details you select). The resulting screen will look similar to the example below:

Product Code Add Company Number: 0 [Choose](#)

Family
Basic

Product
eCommerce Suite

Product Version
Release 2a

License Type
T_1 Regular Lic

Executable
ecomm.exe

Executable Version
1.3

☐ EasyLicense
☐ Add On License

Product Code ecomm1

[Create Product Code](#) [Back](#)

Click Create Product Code.

Figure 3-42 Add Product Code using Product Code Browser

8. Click **Create Product Code**. You will see a message similar to the following:

Product Code Add Company Number: 0 [Choose](#)

Family
Basic

Product
eCommerce Suite

Product Version
Release 2a

License Type
T_1 Regular Lic

Executable
ecomm.exe

Executable Version
1.3

☐ EasyLicense
☐ Add On License

Product Code ecomm1

[Create Product Code](#) [Back](#)

Product Code was created successfully.

Product Code added message.

Figure 3-43 Product Code added successfully message

9. To verify the new product association, click **Back** to return to the Product Code Browser screen. The Product Code you just added is listed:

Product Code Browser Company Number: 0

Product Code	Family	Product	Product Version	Executable	Executable Version	License Type	
ecomm1	Basic	eCommerce Suite	Release 2a	ecomm.exe	1.3	T_1 Regular License	<input type="button" value="View"/>
mytest10	CrypKey	example	v1	myapp.exe	Version 1	DEF DEFAULT LICENSE	<input type="button" value="View"/>
TESTING	CrypKey	example	v1	example.exe	1	B01 VELODROME	<input type="button" value="View"/>

<Prev Next>

New Product Code is listed.

Click View to see details.

Figure 3-44 Verify Product Code added

Procedure – Browse Product Codes

10. To browse Product Codes, go to the Main menu/Product submenu and click on the Product Code Browser link. The Product Code Browser screen displays (see Figure 3-44 Verify Product Code added).
11. To view details of any of the listed Product Codes, click on the **View** button. The Product Code View screen displays:

Product Code View Company Number: 0 Choose

Product Code ecomm1

Update Create New Delete Back

Level none

RTT # 0

Copies 1

☒ Fixed ☐ Floating

☐ EasyLicense

☐ Add On License

Price 0.00

Run Restrictions

☒ Unlimited

☐ Days

☐ Runs

Value 1

Options

Figure 3-45 Product Code View screen

Procedure – Modify Product Codes

1. Note in this view of the Product Code, the Price field appears. This is a required field and can be left at the default value of zero. The price is only applicable if you are using the Casper eCommerce option (see *Part 3: Casper eCommerce*).
2. You can modify the license details as needed. However, remember that the Product Code may be associated with more than one customer Serial Number. Instead of using this screen to make a modification to a Product Code—which will then apply to all Serial Numbers/Customers associated with the Product Code—you may want to change the licensing details for an individual Serial Number. You would do this using the Edit Customer screen (see *Edit Customer Information* on page 136). The following figure shows the sample Product Code 'ecomm1' with a modification (in this example, number of copies has been changed from Fixed to Floating type, and the number increased).

Product Code View Company Number: 0 [Choose](#)

Product Code ecomm1

[Update](#) [Create New](#) [Delete](#) [Back](#)

Product Code information updated successfully.

Level: none

RTT #: 0

Copies: 3

☐ Fixed ☒ Floating

Run Restrictions: ☒ Unlimited ☐ Days ☐ Runs

Value: 1

Options:

☐ EasyLicense

☐ Add On License

Price: 0.00

Number of copies modified from 1 fixed to 3 floating.

Figure 3-46 Product Code – modify details

Procedure – Delete Product Codes

- To delete a Product Code, go to the Main Menu and click the link for [Product Code Browser](#) under the Product submenu. The Product Code Browser displays. This screen lists any existing Product Codes. If the list extends past a single page, use the **Next** and **Prev** buttons to view multiple pages.

Product Code Browser Company Number: 0 [Choose](#)

[Create New](#) [Back](#)

Product Code	Family	Product	Product Version	Executable	Executable Version	License Type	
BasicApp1	Basic	eCommerce Suite	Release 2a	123aaa	1.3	T_1 Regular license	View
mytest10	CrypKey	example	v1	myapp.exe	Version 1	DEF DEFAULT LICENSE	View
TESTING	CRYPKEY DEMO	DEMO PRODUCT	1	EXAMPLE	1	DEF DEFAULT LICENSE	View

<Prev Next>

Click View for Product Code you want to delete.

Figure 3-47 Select Product Code to delete

- Click the **View** button for the Product Code you wish to delete. The Product View screen displays:

Product Code View Company Number: 0 [Choose](#)

Product Code mytest10

[Update](#) [Create New](#) [Delete](#) [Back](#)

Level: none

RTT #: 0

Copies: 1

Run Restrictions: ☒ Unlimited ☐ Days ☐ Runs

Value: 1

Options:

☐ EasyLicense

☐ Add On License

Price: 0.00

Click Delete.

Figure 3-48 View Product Code to delete

- Click **Delete**. The following message pops up:

CasperWeb Verify Delete

Verify deletion of:

Delete product code mytest10 from database?

Deletions cannot be undone.

[Cancel](#) [Delete](#)

Click Delete again.

Figure 3-49 Verify Product Code deletion

- Click **Delete** again to complete the deletion, or **Cancel** to abort the action.

Note: Deletions cannot be undone. Deletions are not possible if any Serial Numbers are already associated with the Product Code you wish to delete.

- CasperWeb returns you to the Product Code Browser list, where you can verify the Product Code has been deleted:

Product Code Browser							Company Number: 0	Choose
Create New							Back	
Product Code	Family	Product	Product Version	Executable	Executable Version	License Type		
BasicApp1	Basic	eCommerce Suite	Release 2a	123aaa	1.3	T_1 Regular license	View	
TESTING	CRYPKEY DEMO	DEMO PRODUCT	1	EXAMPLE	1	DEF DEFAULT LICENSE	View	
							<Prev	Next>

Figure 3-50 Product Code list with deletion

Chapter 4: Managing Customers

CasperWeb offers an easy interface for managing customer information.

Once you have created one or more Product Families, Products, Product Versions, and the associated Executable information, you can add customers to the Casper database. Use the Add New Customer option in the Main menu to create customer records. When you add a customer, you will select a Product Code to be associated with a Serial Number. (Every customer is assigned a unique Serial Number in order to be authorized.)

From the Add New Customer screen you can generate Site Keys for customers as you input customer information (see Generate Site Keys on page 142). However, you would normally use this feature only if a customer has submitted an authorization request over the telephone or by regular email. If the customer uses the CrypKey Instant interface to transmit the request including Site Code, your Casper Server should automatically generate and send out the Site Key.

Note: When creating Customer records, the critical information to enter is the Serial Number and Product Code. The other information—such as name, address, product, and license details—can be entered later as updates using the Edit Customer Info option, or it can be left blank for the customer to enter at the authorization stage.

Add Customer Information

Use this function as a way to add new customers to the database. You can also add customers to the database using the import function.

Procedure

1. From the Main Menu, Customer Info submenu, click on Add New Customer. CasperWeb displays the Add New Customer screen:

Customer Information -- Add

Serial Num

Invoice Num

Name

City

State

Postal Code

Phone

Company

Address

Email

Country

Fax

☐ Time Bomb

End Date

(ie 12/20/03)

☐ Renewal License

Product Code

none

Product

☐ Add On License

☐ EasyLicense

Family

CRYPKEY DEMO

License Type

DEF DEFAULT LIC

Prod Name

DEMO PRODUCT

Prod Version

1

Executable

Name

example.exe

RTT #

Run Restrictions

☒ Unlimited

☐ Days

☐ Runs

Version

Version 1

Copies

Value

Level

none

☒ Fixed ☐ Floating

Memo

Options

Computer Name

User Name

User Fields

User

User

User

User

User

User

User

User

User

User

Figure 4-1 Add Customer screen

2. Scroll down to see the entire contents of the window.

3. Enter the data or make selections as per Table 4-1: Customer Information—Data Entry Fields.

Note: The only required fields are **Serial Num** and **Product Code**. There is no other information needed. The rest of the customer information may be added if desired using the Import function in the System Maintenance menu (see *Chapter 5: Managing CasperWeb, Auto Import* on page 165).

Table 4-1: Customer Information—Data Entry Fields

Field Name	Description
Serial Num	Customer's Serial Number. Required field used as the key to all customer information. Format: free-form.
Invoice Num	The number of your invoice to the customer.
Name	Customer name.
City	City in which the customer resides.
State	State or province in which the customer resides.
Postal Code	Customer's postal code.
Phone	Customer's telephone number.
Time Bomb	Checkbox indicating whether CasperWeb will calculate the number of days remaining until the expiry date specified in End Date (see below). The calculated value is incorporated into the license.
End Date	Expiry date of license. Format: mm/dd/yy.
Company	Customer's company name.
Address	Customer's company address.

Field Name	Description
Email	Customer's email address.
Country	Country in which the customer resides.
Fax	Customer's corporate fax number.
Renewal License	Checkbox indicating whether the current transaction will renew the customer's existing license until the specified expiry date.
Keys Used/Limit	<p>Number of Site Keys that can be generated for this Serial Number, and maximum allowable number of Site Keys generated for this Serial Number.</p> <p>Note: This field appears in the Customer Information screen (see Figure 4-4 Customer Serial Number search), but not in the Add Customer screen.</p>
Middle portion of window – Product section	
Product Code	Product code created in the previous section which defines a license type for the product being authorized for this specific serial number. The code references a set of associations among Family, Product Name, License Type (optional), Product Version, Executable Name, Executable Version, Level (optional), and Options (optional).
Add on License	Checkbox indicating whether the current transaction will add to the existing license of the product. An add-on license operates as an addition to the original, which remains in effect. Check the box and select the additional days, runs or options you want to enable. Note this can also be changed

Field Name	Description
	through the Product Code Add screen.
EasyLicense	Enables an unlimited license for a particular computer. This type of license will only work if the Site Code that comes in to Casper for the specific Serial Number has a valid HDSN. If no HDSN is available the user will not receive a license.
Family	Product family
Prod Name	Product Name
License Type	A 3-character abbreviation defined by you, the software vendor.
Prod Version	Product Version
License type	Type of product license
Middle portion of window – Executable section	
Name	Executable name
Version	Executable version
Level	Level
RTT #	Ready-To-Try number. Feature currently not used in CasperWeb but can be used to record the number.
Copies	The number of copies of the software that you would like the customer to be issued access to with one authorization.
Fixed/Floating	Fixed means running the software on standalone computers. Floating means the ability to run x number of seats concurrently over a network. Both fixed

Field Name	Description
	and floating can be issued more than one copy.
Run Restrictions	Radio buttons indicating whether the license can be run indefinitely (unlimited) or for a specified number (see Value, below) of days or runs.
Value	Number denoting days or runs, as selected in Run Restrictions.
Memo	Any notes that you would like to add for this specific serial number.
Lower portion of window – Options section	If Options have been defined for the Product Code, you can select the options for this <i>specific</i> Serial Number.
Computer Name	Specifies the computer name of the user requesting authorization.
User Name	Specifies the username once authorized if configured in Casper Wizard.
User Fields	Ten supplemental data fields (User1, User2, etc.) used to accommodate information values not included in the standard CasperWeb customer record. For example, the standard CasperWeb customer record includes the customer name, but you may want to record another technical contact name and phone number. You could use the User Fields feature to record this information. We recommend that in each field you use, you put consistent types of information (User1, User2, etc.). In this way, you will maintain consistency of record content.

4. The following figure shows a sample of adding a customer:

Figure 4-2 Customer added

5. When you are satisfied with the entry, click **Done**. CasperWeb displays a message similar to the following:

Figure 4-3 Customer added successfully message

Note: You may encounter problems if you:

- Click the **Renewal License** checkbox when using a Product Code for an add-on license.

Edit Customer Information

Use this function to review and revise customer information: for example, you want to add more data to the new customer in the example above.

You can modify the Customer name and other data in the record, but not the Serial Number itself.

Procedure

1. From the Main Menu, Customer Info submenu, click on Edit Customer Info. CasperWeb displays the Customer Information screen.
2. To search for a customer record, enter the serial, name or invoice number in the **Find** box and click the button of the same type (**Serial, Name, Invoice**). See the example below.

Note: Search conventions are:

- You can type the full value, a partial value together with the wild card "*", the full value including the placeholder "?", or "*" by itself, as in the following examples:
 - Full value – for example, if you type in 123 and click **Number**, CasperWeb will search for a match strictly based on the Serial Number 123.
 - Partial value plus wild card – for example, if you type in 100*, CasperWeb will match to all Serial Numbers beginning with 100, such as 10010 and 10044.
 - Full value including the placeholder "?" character – for example, 100?5 will match the Serial Numbers 10015 and 10025, but not the Serial Numbers 10016 or 1001599.

The screenshot shows the CasperWeb interface. At the top is a yellow navigation bar with links: Main, Help, Logout. To the right is a 'Find' section with a text input field containing 'b747' and three buttons: 'Serial', 'Name', and 'Invoice'. An arrow points from the text 'Enter serial number and click Serial button.' to the 'Serial' button. Below the navigation bar is a blue header for 'Customer Information' with a 'Company Number: 0' and a 'Choose' button. The main area contains three input fields: 'Serial Num', 'Invoice Num', and 'Name'. To the right of these fields are buttons: 'Page', 'Prev', 'Next', 'Back', 'History', 'Add', 'Update', 'Delete', and 'Site Key Gen'.

Figure 4-4 Customer Serial Number search

3. CasperWeb will display the first value in the list of results. If there is more than one result, you can click on the drop-down arrow in the box for the searched field (**Serial, Name, Invoice**). See the following example:

The screenshot displays the 'Customer Information' form in CasperWeb. The form is titled 'Customer Information' and includes a 'Company Number: 0' field with a 'Choose' button. The 'Serial Num' field is set to 'b747', and the page is 'Page 1 of 1'. Action buttons include 'Back', 'History', 'Add', 'Update', 'Delete', and 'Site Key Gen'. The form is divided into three main sections: Customer Information, Product Information, and User Information. The Customer Information section includes fields for Invoice Num, Name, Address, City, State, Postal Code, Country, and Email. The Product Information section includes fields for Product Code (set to 'ecomm1'), Family (set to 'Basic'), Version (set to 'Release 2a'), and License Type (set to 'T_1'). The User Information section includes checkboxes for 'Add On License', 'Renewal License', and 'Time Bomb - End Date' (set to '01/01/1900'), and a 'Keys Used / Limit' field (set to '0 of 1').

Customer Information		Company Number: 0		Choose
Serial Num	b747	Page 1 of 1		
Invoice Num		Back	History	Add
Name		Update	Delete	Site Key Gen
Address		Phone		
City		Fax		
State		Company		
Postal Code		<input type="checkbox"/> Add On License		
Country		<input type="checkbox"/> Renewal License		
Email		<input type="checkbox"/> Time Bomb - End Date	01/01/1900	
		Keys Used / Limit	0 of	1
Product		Product Code	ecomm1	<input type="checkbox"/> EasyLicense
Family	Basic	Version	Release 2a	
Name	eCommerce Suite	License Type	T_1	

Figure 4-5 Serial Number search results

Notes

- The Serial Number—not the customer name—is the key field used by CasperWeb to reference customer records.
- The Serial number is associated with a Product Code, so the Product Code information will be displayed in the middle portion of the window as well as the customer information.
- In typical searches, more than one piece of information will often be found. When this happens, CasperWeb displays all found matches in a drop-down list beside the data field searched – i.e., beside the Serial Num, Invoice Num, or Name field as applicable. If the search generates too many matches to fit into the drop-down list box, you can use the **Prev** and **Next** buttons to display other additional matches.
- The Product and Executable fields in the middle portion of the window (see Figure 4-2 Customer) are not editable, since they directly reference Product Code information.
- The User fields in the lower area of the screen are typically customer inputs from the Casper wizard. If you require your customer to input User information in the Casper Wizard, it will overwrite whatever you may enter

in these fields. If you have notes you want to enter, use the Memo area (see Figure 4-1 Add Customer screen).

Options

Computer Name

User Name

User Fields

User0 Admin.: J. Smith

User1 Tel (o.) 235-6789

User2

User3

User4

User5

User6

User7

User8

User9

Figure 4-6 Edit Customer screen—User fields

- When you have found the record you want to modify, type values into the fields, then click **Update**. CasperWeb will save the changes you have made, and display the Customer Information window as in the example below:

Customer Information

Company Number: 0 Choose

Page 1 of 1

Serial Num b747

Invoice Num

Name

Address

City

State

Postal Code

Country

Email

Phone

Fax

Company

☐ Add On License

☐ Renewal License

☐ Time Bomb - End Date 01/01/1900

Keys Used / Limit 0 of 5

Product Product Code ecomm1 ☐ EasyLicense

Back History Add Update

Delete Site Key Gen

Enter edits and click Update.

Sample edit: license limit increased from 1 to 5.

Figure 4-7 Edited Customer Information

Delete Customer Information

Procedure

1. Follow the instructions above in *Edit Customer Information* to find the record you want to delete.

Customer Information

Company Number: 0

Page 1 of 1

Serial Num

Invoice Num

Name

Address

City

State

Postal Code

Country

Email

Phone

Fax

Company

☐ Add On License

☐ Renewal License

☐ Time Bomb - End Date

Keys Used / Limit 0 of

Product ☐ EasyLicense

To delete a record, Find it and then click Delete.

Figure 4-8 Find Customer record to delete

2. Click the **Delete** button to delete the record. CasperWeb displays a deletion verification message:

CasperWeb Verify Delete

Verify deletion of:

Delete serial number B747 from customer data?

NOTE: ALL CUSTOMER HISTORY FOR THIS SERIAL NUMBER WILL ALSO BE DELETED!

Deletions cannot be undone.

Click Delete to delete record; Cancel to cancel action.

Figure 4-9 Verify Customer record deletion

Note: Deletions cannot be undone.

3. CasperWeb will display a message similar to the following:

Customer Record was deleted.

4. Or, click **Cancel** to cancel the action. Deleted records cannot be reversed.

Display Customer History

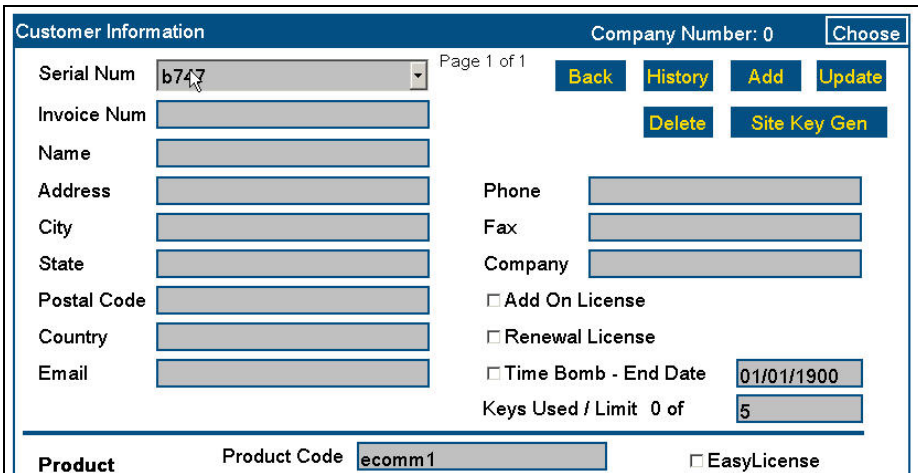
The Customer History feature, launched using the **History** button in the Customer Information window, displays the Site Code and Site Key history for the selected Customer record. The key data value in this function is the *Serial Number* (not the customer name). The customer history screen has records of all Site Key Generations.

The Customer Information history contains authorization details, by customer, of specific products (including executables and version numbers) and restrictions you impose on customers' access to the purchased products.

When Casper generates a Site Key, CasperWeb records several items, including the Serial Number, the date, the product Family and product name, the Site Code provided by the customer, and the generated Site Key. Each generation of a Site Key results in a set of these values being recorded in the system. The History function makes this information available for display.

Procedure

1. From the Main Menu, Customer Info submenu, click the Edit Customer Info link. CasperWeb displays the Customer Information screen (see Figure 4-12 Site Key Generator screen).
2. To search for a customer record, enter the Serial Number, name or invoice number in the **Find** box and click the button of the same type (**Serial**, **Name**, **Invoice**). In the example below, we use Serial Number b747.



Customer Information Company Number: 0

Serial Num Page 1 of 1

Invoice Num

Name

Address

City

State

Postal Code

Country

Email

Phone

Fax

Company

☐ Add On License

☐ Renewal License

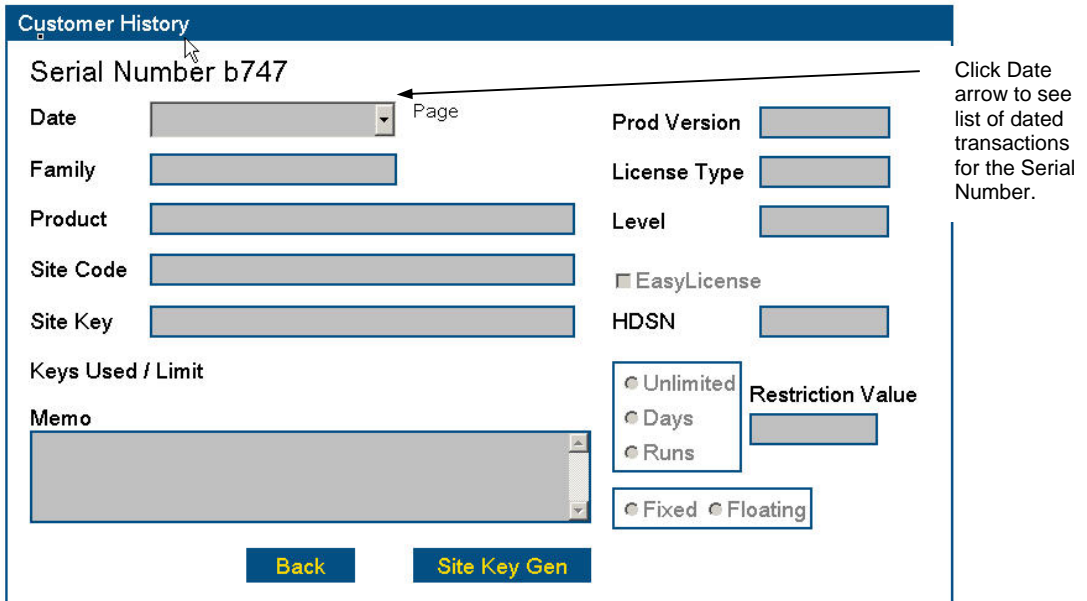
☐ Time Bomb - End Date

Keys Used / Limit 0 of

Product Product Code ☐ EasyLicense

Figure 4-10 Customer Information screen

3. In the Customer Information screen, click **History**. CasperWeb will display the following screen:



Customer History

Serial Number

Date Page

Family

Product

Site Code

Site Key

Keys Used / Limit

Memo

Prod Version

License Type

Level

☐ EasyLicense

HDSN

☐ Unlimited ☐ Days ☐ Runs

☐ Fixed ☐ Floating

Restriction Value

Click Date arrow to see list of dated transactions for the Serial Number.

Figure 4-11 Customer History for specified Serial Number

Note: The Memo field will be blank unless the Casper Site Key Generator was used to manually generate a Site Key and a memo was entered at that time.

Note: The fields in the sample Customer History screen above will be filled in if there has been an authorization for the Serial Number.

If more than one authorization has been recorded for the specified Serial Number, you will be able to display a drop-down list of authorization dates in the Date field. The screen will show the Site Codes, Site Keys and other information related to each dated authorization.

Generate Site Keys

The Site Key Generator enables you to manually create and send Site Keys to your customers, authorizing them to use your software. Normally the Site Key is generated automatically over the Internet using Casper, but there may be cases where the customer hasn't been able to send you a request for a license using the Casper Client Wizard (which you bundled with your software). You could also use the manual Site Key Generator that came with CrypKey Instant or SDK.

A Site Key is a character string that is output from the processing of a Site Code received with your customer's authorization request. The Site Key also incorporates restrictions that you specify for the user license. The Site Code is generated by CrypKey, based on information extracted from the customer's computer.

Note: You would normally use the Site Key Generator only if a customer has submitted an authorization request over the telephone or by regular email. Normally the customer uses the Casper Electronic Purchase Wizard to transmit the request, including the Site Code, and your Casper Server should generate and send out the Site Key automatically.

To generate a Site Key using the Site Key Generator in CasperWeb, you manually enter the Site Code, along with restrictions for your customer's software use, into input fields in the Site Key Generator screen. The Site Key Generator creates a Site Key from this information, which you send to your customer by email, telephone, or fax.

You can launch the CasperWeb Site Key Generator from two places:

- a. the Customer Information – Add window, after you have created a record; or
- b. the Customer Information screen (accessed from the Edit Customer option on the Customer Info menu).

Procedure

1. Do either of the following:

- click the **Done** button to complete the addition of a new record (see *Add Customer Information* on page 129).
 - display the Edit Customer window for a specific record (see *Edit Customer Information* on page 136).
2. Click the **Site Key Generator** button. CasperWeb will display the Site Key Generator screen for the selected Serial Number:

Site Key Generator

Company Number: 0 **Choose**

Serial Number 123

Site Code **Check Site Code**

Product

Prod Code

Family

Name

Version

Lic Type

Executable

Name

Version

Auth Name

Password

Copies Level

☒ Fixed ☐ Floating ☐ Add On License ☐ EasyLicense

Run Restrictions

☐ Unlimited ☒ Days ☐ Runs

Keys Used / Limit 2 of 99999

Value Options

Memo

Back **Generate Site Key**

Site Key

Enter the Site Code, then click Check Site Code.

Figure 4-12 Site Key Generator screen

Notes:

- The Serial Number appears in the top left-hand side of the screen. For descriptions of the fields see Table 4-2: Site Key Generator —Data Entry Fields.
- The Keys Used/Limit field contains the number of Site Keys previously generated for this Serial Number, and the maximum number as defined in the Customer Information record.

- Shaded textboxes are automatically populated by the Site Key Generator, and are not editable.
3. In the Site Code field, type in the Site Code received from your customer.
 4. Click the **Check Site Code** button. If the test is successful, you will see a message similar to the following:

The screenshot shows the 'Site Key Generator' application window. The title bar includes 'Company Number: 0' and a 'Choose' button. The main area is divided into several sections:

- Serial Number 123**: A label for the top-left section.
- Product**: A section with fields for 'Prod Code' (TESTING), 'Family' (CrypKey), 'Name' (example), 'Version' (v1), and 'Lic Type' (B01).
- Executable**: A section with fields for 'Name' (example.exe) and 'Version' (1).
- Memo**: A large text area at the bottom left.
- Site Code**: A field containing '7429 9E3B F335 3C44 F5'.
- Check Site Code**: A yellow button next to the Site Code field.
- Check Success. HDSN = 25627**: A message displayed below the button, with an arrow pointing to it from the right.
- Auth Name**: A field for authorization name.
- Password**: A field containing 'KENONIC'.
- Copies**: A field with the value '1'.
- Level**: A dropdown menu set to 'none'.
- Run Restrictions**: A section with radio buttons for 'Fixed' (selected), 'Floating', 'Unlimited', 'Days', and 'Runs'.
- Value**: A field with the value '3'.
- Options**: A section with checkboxes for 'Add On License' and 'EasyLicense'.
- Keys Used / Limit**: A label showing '1 of 999'.

At the bottom, there are buttons for 'Back' and 'Generate Site Key'.

Figure 4-13 Check Site Code test message

5. Select the criteria you want applied to the license, such as number of copies, level, options, and run restrictions. Optionally, type a name into the **Auth(ORIZATION) Name** field, and a note into the **Memo** field (for the Vendor's use).
6. When you are satisfied with your data input, click **Generate Site Key**. The screen now appears as follows (note the Site Key field is filled in):

Serial Number 123

Product

Prod Code

Family

Name

Version

Lic Type

Executable

Name

Version

Memo

Site Code

Check Site Code

Auth Name

Password

Copies

Level

☒ Fixed ☐ Floating

☐ Add On License

☐ EasyLicense

Run Restrictions

☐ Unlimited

☒ Days

☐ Runs

Value

Keys Used / Limit 2 of 999

Options

11 ☒

Back

Generate Site Key

Site Key

Site Key has been generated.

Figure 4-14 Manually generated Site Key

7. Copy the Site Key from the above window into a regular email to be sent to your customer.

Table 4-2: Site Key Generator —Data Entry Fields

Field	Description
Non-Editable Fields	
<i>Product</i>	
Serial Number	A Serial Number is tied directly to a Product Code for a specific customer. (see Customer Information screens in the section above, <i>Add Customer Information</i>).
Prod Code	Product Code which the Serial Number is associated with.
Family	Product family, defined in the Product Family records in CasperWeb.

Field	Description
Name	Product name.
Product Version (number)	Product version number — this is the version number set for this Product Code.
Lic Type	License type is directly associated with Product Code, it is defined when the Product Code is created.
Executable	
Name	Filename specified in the Product Code creation. This is the filename that you used to obtain developer keys from CrypKey.
Executable Version	Executable version number — the source is the Rev. No. value defined in the Product Code creation process.
Memo	Optional free-form field for entry of instructions or other information concerning the generated Site Key.
Password	Password defined for the Executable in question (see Figure 3-23 Add Executable Version screen).
Editable Fields	
Site Key Generation	
Site Code	Site code is the string of characters created by the client side software to obtain authorization. This information is not seen by the user if they do their authorization via http. If the customer does not have access to e-mail or http they can call and give you the Site Code.

Field	Description
Auth Name	Name of the user you are generating a Site Key for. Format: X13.
Copies	<p>For fixed licenses: the number of copies of software you would like the user to be able to run on different machines at one time. If you issue 3 copies, the customer has the ability if enabled in your software to transfer the software to two other machines and still have a copy available on their own machine. Format: I9</p> <p>For floating licenses: the number of users who can concurrently use the software over a network. Format: I9.</p>
Fixed button	Option button: fixed type of license (i.e., the software must be run on one or more specific computers, depending on the value specified for Copies (see above).
Floating button	Option button: floating type of license (i.e., the software is loaded on a Server and can be accessed concurrently by one or more users, depending on the value specified for Copies (see above).
Level	Level assigned to the license (default value: zero (0)). A level is a number that controls a variety of features in your product. A corresponding number must exist in the actual software.
Add-on License checkbox	Checkbox used to indicate the license will add to an existing authorized license.
Keys Used/Limit 0 of 1	<p>This dual field contains:</p> <ul style="list-style-type: none"> - The number of authorizations already generated for this Serial Number;

Field	Description
	<ul style="list-style-type: none">- The maximum allowable number of authorizations that can be generated for this Serial Number (as defined in the Customer Information screen, see <i>Edit Customer Information</i> on page 136).
Run Restrictions	<p>Any of the following restrictions on the customer's use of the program:</p> <ul style="list-style-type: none">- unlimited (no restrictions applied)- days (the number of days the customer can run the program)- runs (the number of program runs available to the customer) <p>If Days or Runs is selected, you must input the number of days or runs into the Value field on the right of the panel.</p>
Value	Number applying to the selected Run Restrictions.
Options	Checkboxes representing options (defined in the Options and Levels function – see 101101) that you can select or deselect.

Chapter 5: Managing CasperWeb

CasperWeb offers an easy interface for user and system maintenance tasks.

CasperWeb is the Graphical User Interface (GUI) you use to manage your customer and product information in the Casper database, and to maintain the system. See *Chapter 1: Overview* for more information.

System maintenance and user functions are available in CasperWeb from the Main menu, SuperUser submenu. See Figure 5-1 SuperUser menu:

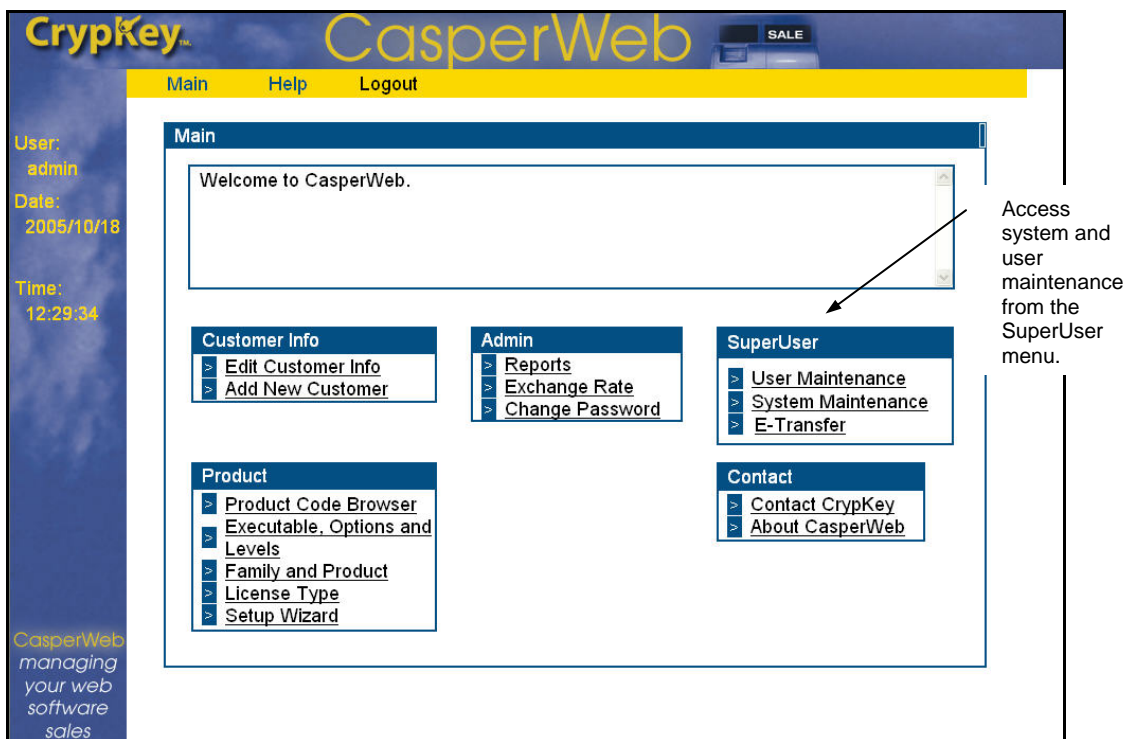


Figure 5-1 SuperUser menu

Note: The SuperUser menu is available only to those with SuperUser access, i.e. administrators.

Note: CrypKey eTransfer maintenance is also available from the SuperUser menu. This feature is discussed in *Part 5: Casper eTransfer*.

User Maintenance

The person(s) in charge of administering your CasperWeb installation can add, modify, and delete users with varying levels of access privileges, as well as change passwords. CasperWeb administrators must have “Super User” access privileges.

ADD A USER

Procedure

1. Go to the Main menu (see *Log on to CasperWeb* starting on page 68).
2. From the SuperUser menu, click the User Maintenance link. The User Maintenance screen displays:

The screenshot shows the 'User Maintenance' screen. At the top, there is a header bar with 'User Maintenance' on the left, 'Company Number: 0' in the center, and a 'Choose' button on the right. Below the header, the form contains several fields and buttons. The 'User' field is a dropdown menu with 'admin' selected. To its right are 'Add' and 'Delete' buttons. The 'Access Level' field is a dropdown menu with 'Super User All Acces:' selected, and to its right is a 'Change Password' button. The 'Last Access' field is a text box containing '2005-11-16 18:21'. The 'Real Name' field is a text box containing 'Administrator'. The 'Description' field is a text area containing 'Casper Web administration user'. The 'Message' field is a text area containing 'Welcome to CasperWeb.'. At the bottom of the form are 'Submit' and 'Back' buttons. An arrow points from the text 'Click Add.' to the 'Add' button.

User Maintenance Company Number: 0 Choose

User admin Add Delete

Access Level Super User All Acces: Change Password

Last Access 2005-11-16 18:21

Real Name Administrator

Description Casper Web administration user

Message Welcome to CasperWeb.

Submit Back

Click Add.

Figure 5-2 User Maintenance screen

3. Click **Add**. The Add New User displays:

Add New User **Company Number: 0** **Choose**

User

Password

Real Name

Description

Message

Access Level **Vendor** ▼

Select from pre-determined access level.

Enter the other information.

Done **Back**

Figure 5-3 Add New User screen

4. Click on the drop-down arrow for the **Access Level** field to select an access level, which is pre-defined in the Casper installation.
5. Enter the information as per the following table:

Table 5-1: Add New User — Data Entry Fields

Field	Description
User	User ID
Access Level	Drop-down list containing available access levels (pre-defined)
Password	Password that the user will enter to proceed with the application
Real Name	User's full name
Description	Relevant information about the user's role

	in using the application
Message	Message that the user will see when logging onto the system.

- Click **Done**. A message will appear on the bottom of the screen to report that you have successfully created a new User.

Add New User **Company Number: 0** **Choose**

User: Access Level:

Password:

Real Name:

Description:

Message:

Done **Back**

User added successfully.

User added message.

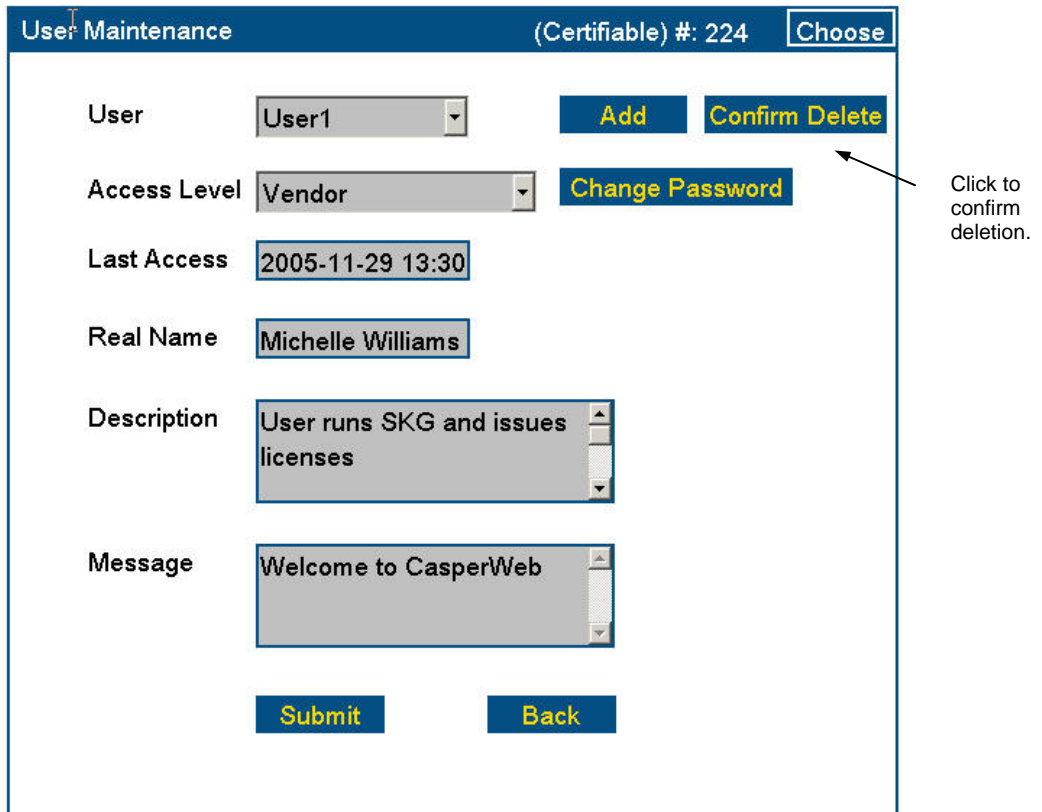
Figure 5-4 New User added successfully message

- Click **Back** to return to the User Maintenance screen.

DELETE A USER

Procedure

- From the User Maintenance screen (see Figure 5-2 User Maintenance screen), click on the **User** down arrow to select the User record you wish to delete.
- Click **Delete**. The **Delete** button will change to **Confirm Delete**.



The screenshot shows a web interface titled "User Maintenance" with a sub-header "(Certifiable) #: 224" and a "Choose" button. The form contains the following fields and buttons:

- User:** A dropdown menu showing "User1". To its right are buttons "Add" and "Confirm Delete".
- Access Level:** A dropdown menu showing "Vendor". To its right is a "Change Password" button.
- Last Access:** A text field showing "2005-11-29 13:30".
- Real Name:** A text field showing "Michelle Williams".
- Description:** A text area showing "User runs SKG and issues licenses".
- Message:** A text area showing "Welcome to CasperWeb".
- At the bottom are "Submit" and "Back" buttons.

An arrow points from the text "Click to confirm deletion." to the "Confirm Delete" button.

Figure 5-5 Delete User confirmation

3. If you wish to continue, click **Confirm Delete**. CasperWeb displays the deleted record:

The screenshot shows the 'User Maintenance' interface. At the top, there is a header bar with the title 'User Maintenance', a label '(Certifiable) #: 224', and a 'Choose' button. Below the header, the form contains several fields: 'User' (a drop-down menu), 'Access Level' (a drop-down menu), 'Last Access' (a text field), 'Real Name' (a text field), 'Description' (a large text area), and 'Message' (a large text area). To the right of the 'User' field is an 'Add' button, and to the right of the 'Access Level' field is a 'Delete' button. Below the 'Access Level' field is a 'Change Password' button. At the bottom of the form are 'Submit' and 'Back' buttons. A message 'User was deleted.' is displayed at the bottom left. An arrow points from the 'Delete' button to the 'User' field with the text 'Select user.' Another arrow points from the 'User was deleted.' message to the right with the text 'User successfully deleted message.'

User Maintenance (Certifiable) #: 224 Choose

User Add Delete

Access Level Change Password

Last Access

Real Name

Description

Message

Submit Back

User was deleted.

Select user.

User successfully deleted message.

Figure 5-6 User Deleted message

CHANGE A USER PASSWORD FROM SUPERUSER MENU

Procedure

1. To change a User's password from the User Maintenance screen, select the User from the drop-down list.
2. Click **Change Password**. The Change Password screen displays:

The screenshot shows a 'Change Password' form with a dark blue header. The form contains the following elements:

- User:** A dropdown menu currently showing 'admin'.
- New Password:** A text input field.
- Retype Password:** A text input field.
- OK:** A blue button with yellow text.
- Back:** A blue button with yellow text.

Annotations with arrows point to the 'New Password' field and the 'OK' button. The text for the first arrow is 'Enter password, and re-enter to confirm.' and for the second arrow is 'Click OK.'

Figure 5-7 Change Password – from User Maintenance screen

3. Enter the user's new password.
4. Retype the password.
5. Click **OK**. You will get a confirmation message that the password was successfully changed.

System Maintenance

Use the System Maintenance menu to view and configure the Casper Server. The System Maintenance menu consists of 9 pages:

1. General
2. Email
3. E-Receipt
4. Licensing via Email
5. Easy License
6. Auto Import
7. Credit Card
8. Fraud

9. Taxes

Note: Pages 1-2 and 4-6 are described in this section; for page 3, and 7-9, please refer to *Part 3: Casper eCommerce*.

GENERAL

Page 1 allows you to configure email settings, database and CasperWeb log in information.

Procedure

1. Go to the Main menu (see *Log on to CasperWeb* starting on page 68).
2. From the SuperUser menu, click the System Maintenance link. The System Maintenance screen displays:

Enter subject to trigger email processing.

Select another menu option, or click Next Page to go page 2.

Click to test email checking.

Set timeframe for Casper to check customer emails.

Run database updates.

Enter CasperWeb login information.

The screenshot shows the 'System Maintenance' interface with a '1 - General' dropdown menu. The page is divided into three main sections: General, Database, and CasperWeb Login Information. The General section includes an 'Update' button, a 'Check Email every' field with '0' hours and '1' minutes, a 'Trigger on subject' field with 'Registration Request', and an 'Email Test' button. The Database section includes fields for 'ODBC Name' (CasperDB), 'Login User' (DBA), 'Login Password', and 'Company Number'. The CasperWeb Login Information section includes fields for 'Login User' (admin) and 'Login Password'. Annotations with arrows point to various elements: 'Enter subject to trigger email processing.' points to the 'Trigger on subject' field; 'Select another menu option, or click Next Page to go page 2.' points to the '1 - General' dropdown; 'Click to test email checking.' points to the 'Email Test' button; 'Set timeframe for Casper to check customer emails.' points to the 'Check Email every' field; 'Run database updates.' points to the 'Run Database Updates' button; and 'Enter CasperWeb login information.' points to the 'Login User' and 'Login Password' fields.

Figure 5-8 System Maintenance – General

- Page #1, General, is shown in the drop-down list. To select another option from the System Maintenance menu, click on the drop-down arrow, or click **Next Page**. Click **Prev Page** to return to the previous page.
- The **General** page is divided into three sections: General, Database, and CasperWeb Login Information.
- General** area: Enter information as per the following table.

sTable 5-2: System Maintenance/General Page/General – Data Entry fields

Field	Description
Check Email every	How often (in hours and minutes) you want Casper to check for email from your customers. The Casper Client sends email registration requests to the server whenever an HTTP request is unable to be processed. On page 2 of the System Maintenance screen you will set up the email account to be used for this purpose.
Trigger on subject	Acts as a filter for messages. Only emails with the specified subject in the subject line (e.g. "Registration Request") will be processed by Casper.

IMPORTANT

The Trigger on Subject line must be identical to the subject line entered through your CrypKey-protected software, e.g. CrypKey Instant. See *Chapter 6: Test Casper eRegister*, Figure 6-1 CrypKey Instant with Casper enabled.

6. Click **Email Test** to run a test of your email configuration. See *Part 1: Setting up Casper, Set up a Test Email Account* for details on how to run a test email.
7. **Database area:** Enter information as per the following table:

Table 5-3: System Maintenance/General Page/Database area – Data Entry fields

Field	Description
ODBC Name	ODBC database name of the Casper database: casperdb.
Login User	your ODBC database userid
Login Password	your ODBC database password.
Company Number	Contact CrypKey Technical Support at support@crypkey.com to obtain this number.

8. Click **Run Database Updates** to update the information in the Casper database. This includes table updates, etc. which Casper needs to run, but does not include any customized information. The Casper Server checks CasperWeb for Serial Numbers

and other customer information when responding to customer authorization-request messages.

Note: Run **Database Updates** after any changes to the database, e.g. an installation or importing data.

9. **CasperWeb Login Information** area: Enter information as per the following table:

Table 5-4: System Maintenance/General Page/CasperWeb Login Information – Data Entry fields

Field	Description
Login User	Your CasperWeb log in userid
Login Password	Your CasperWeb log in password

10. Click **Update** to save the changes for the entire screen.

EMAIL SERVER SET-UP

Page 2 – Email allows you to set up the incoming and outgoing email servers for Casper email.

Procedure

1. From the System Maintenance menu, select page **3 – Email** from the drop-down menu. The Email Server page displays:

The screenshot displays the 'System Maintenance' interface with a dropdown menu set to '2 - Email'. Below the header, there is a blue bar with 'Update' and 'Email Test' buttons. The main content area is titled 'Email Server' and contains two sections: 'Incoming Email (POP3)' and 'Outgoing Email (SMTP)'. Each section has input fields for 'Server', 'Logon User', and 'Logon Password'. The 'Outgoing Email (SMTP)' section also includes a 'Return Address' field. The page is labeled 'Page 2 of 9' with 'Prev Page' and 'Next Page' links.

Figure 5-9 System Maintenance – Email Server

2. Enter the required information according to the following table:

Table 5-5: System Maintenance/Email Server – Data Entry fields

Field	Description
Incoming Email (POP3): server/logon user/logon password	<p>POP3 is the only incoming email type Casper supports.</p> <p>The name of the Server that handles incoming and outgoing email; the Logon User (either your user name or email address, depending on how the email server is set up); the Logon Password.</p>
Outgoing Email (SMTP) server/logon user/logon password/return address	<p>SMTP is the only outgoing email type Casper supports.</p> <p>The name of the Server that handles outgoing email; the Logon User (either your user name or email address, depending on how the email server is set up); the Logon Password; and the Return Address to which customers may reply.</p> <p>This should be an email address that is checked by a human, such as a support group's email address, and is usually different from the Casper server email address. Click Update to save the changes.</p> <p>Note: The return email address must be filled in. Some email servers require it.</p>

Note: The incoming email server logon user and the outgoing email server logon user may be different.

3. Click **Update** to save changes.

E-RECEIPT

Page 3 – E-Receipt allows you to configure the Casper server to send automatic electronic receipts in response to successful credit card transactions made via Internet messages. Refer to *Part 3: Casper e-Commerce* for details.

For transactions made via email messages, separate electronic receipts are not issued. Instead, the receipt information is included in the standard confirmation email sent to the customer.

LICENSING VIA EMAIL

Page 4 – Licensing via Email allows you to send your customer authorization via email. You can force use of email authorization by *not* providing the URL for Internet-based authorizations in the Casper Wizard. As well, if the http: authorization fails, Casper will revert to email authorization automatically.

Procedure

1. From the System Maintenance menu, select page **4 – Licensing via Email** from the drop-down menu. The Licensing via Email page displays:

Figure 5-10 System Maintenance – Licensing via Email

2. Enter the information according to the following table:

Table 5-6: System Maintenance/Licensing via Email – Data Entry fields

Field	Description
Archive file	Specify the full path for the log file to be written to.

Email options	Click the checkbox options that you require. Typically you should select the checkbox Send license/eReceipt to email address supplied in Wizard . If you select this checkbox, Casper will send the reply email to both the Server and the customer's email address as entered in the Casper Wizard. If this option is not selected, the reply is sent to the originating email address.
Response Text/ Use default response text	Enter the response message to be sent to your customers when licensing your software via email. In your message, be sure to instruct your customer to enter the site key that Casper generates and sends with the reply email, in order to have their authorization completed. Check the box Use Default response text to use the default response text.

3. Click **Update** to save your changes.

EASY LICENSE

Page **5 – EasyLicense** allows you to instruct Casper to use a Normal license instead of EasyLicense in the event that EasyLicense fails (see Figure 3-40 Product Code Add screen). A Normal license is one defined by you with particular license restrictions. The Serial Number you use for authorization in Casper Wizard contains the license restrictions.

Procedure

1. From the System Maintenance menu, select page **5 – EasyLicense** from the drop-down menu. The EasyLicense page displays:

System Maintenance
5 - Easy License

Update
Page 5 of 9
Prev Page
Next Page

EasyLicense

☐ When using EasyLicense and an EasyLicense site code is not available, generate a Normal license instead.

Other

Casper Log File

Wrap log file length (bytes)

CallBack DLL

Figure 5-11 System Maintenance – EasyLicense

2. Enter the information according to the following table:

Table 5-7: System Maintenance/Easy License – Data Entry fields

Field	Description
When using EasyLicense and an EasyLicense site code is not available, generate a Normal license instead.	Check to enable this feature. Casper must be able to read a site code HDSN in order to enable EasyLicense.
Others	
Casper log file	This is the default directory and name of the Casper log file. You can change the directory where the log file will be stored. You can leave the log file blank, thus disabling event logging; however, this is not recommended. The log file is also useful to CrypKey Technical Support, should you need to seek assistance in resolving system problems.
Wrap log file length	Specify the size of the file before it rolls over. The file is a text file and does not contain proprietary or private information. Each event includes a timestamp. The Server truncates old data in order to maintain the log file at a maximum of 128 KB and prevent extremely large log files.
Callback DLL	The name of the DLL (Dynamically

	Linked Library). The DLL must be available in the Casper install directory. Input is optional. See <i>Appendix A</i> for more information on callback routines.
--	---

3. Click **Update** to save your changes.

AUTO IMPORT

Page 6 – Auto Import allows you to import customer information in .csv or .xml files for entry into the Casper database (this is the quick alternative to manually adding the information via the Customer Add screen, see *Add Customer Information* on page 129).

Procedure

1. From the System Maintenance menu, select page **6 – Auto Import** from the drop-down menu. The Auto Import page displays:

System Maintenance

6 - Auto Import

Update

Page 6 of 9

Prev Page

Next Page

Auto Import

Import every

0

 hours

0

 minutes (set both to zero to disable)

Source Directory

\

Archive Directory

\

Product import

☐ Generate Product Code error files

☐ Ignore duplicate data errors

☐ Overwrite data if duplicate

Figure 5-12 System Maintenance – Auto Import

2. Enter the required information according to the following table:

Table 5-8: System Maintenance/Auto Import – Data Entry fields

Field	Description
Import every	Instructs the Casper Server to check periodically for import files. Set the import-file checking interval by hours and minutes. Set both hours and minutes to zero to disable.

Source directory	The full path to a directory where the import files will be extracted by the Server.
Archive directory (see Note below)	<p>The full path to a directory where import files will be moved after being processed by Casper Server. Note: A log file (*.log) is also created in the Archive Directory for each file processed. If there is an error, an error file (*.err) is created in the Archive Directory. You should check the Archive Directory for error files, correct the corresponding import file, and copy the import file back to the Source Directory for reprocessing.</p> <p>Error files and log files will be kept in the Archive Directory as well.</p>
Product Import	<p>General Product Code error files – this setting causes Casper Server to generate an additional error file in the archive directory, if there is an error in the Product Code.</p> <p>Ignore duplicate data errors – this setting allows the import of duplicate data without generating an error.</p> <p>Overwrite data if duplicate – this setting allows imported data to overwrite existing database data, even in cases of duplication.</p>

Note: For details of constructing Casper data externally in a Comma-Separated Values (CSV) Auto Import file, see *Appendix A: Technical References*, CSV import file formats.

3. Click **Update** to save your changes.

Chapter 6: Test Casper eRegister

Before processing live customer orders, we recommend you test Casper using your company data.

In *Part 1: Setting up Casper*, you tested Internet-based authorization requests from customers and issuing of licenses for your software; and also email authorization requests and issuing of licenses, using CrypKey-supplied test data. Now you need to repeat those tests using the live company data you entered (see *Chapter 3: Managing Products* and *Chapter 4: Managing Customers*).

Before testing Casper communications with your company data, you must first authorize the software.

Authorize your Casper Software

Refer to the following step-by-step instructions for licensing Casper.

To request your company-specific Casper files, send a request to authorize@crypkey.com asking for your company-specific Casper files. These files can only be obtained after CrypKey has received payment.

CrypKey will email you the following files:

- **priv.key** – encryption key that replaces the sample key installed with Casper
- **pub.key** – public encryption key to distribute to customers
- **sk32mmttd.dll** – site key generator dll customized for your company products.

Procedure

1. Stop the web services using the statements:

```
net stop iisadmin /y
```

```
net stop CasperTimerService
```

```
net stop CasperV6
```

2. Place the **sk32mmtd.dll** file in the Casper program directory.
3. Copy the **priv.key** file to your Casper program directory.
4. Put the **pub.key** file into the distribution that your client receives.
5. Restart the web services using the statement:

```
net start w3svc
```

```
net start Casper TimerService
```

Test Casper Software using Company Data

Testing Casper eCommerce software follows the same process as in *Part 1: Setting Up Casper, Testing Internet-based Authorization Requests and Issuing of Licenses*. However, instead of using the test data, you will use your own company data.

Do *not* use the Client Test Program or the Simple Test Program, because you are now using your company-specific files **sk32mmtd.dll**, **priv.key**, and **pub.key**.

You must create and protect your own program to test with—for example, you can use your CrypKey-protected software (CrypKey Instant or CrypKey SDK) to run these tests. In order to use CrypKey Instant or CrypKey SDK, you must embed the Casper information into the protected software and be using the Casper Wizard. The following figure shows a sample of CrypKey Instant with Casper enabled.

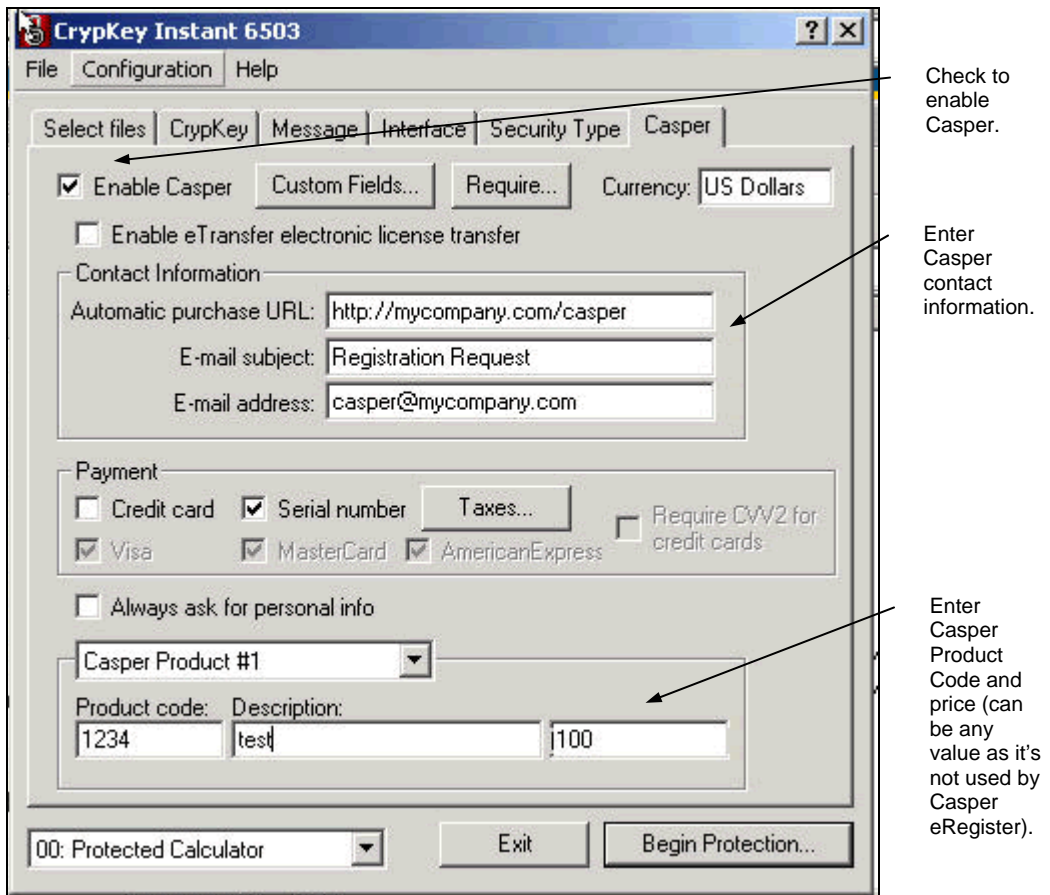


Figure 6-1 CrypKey Instant with Casper enabled

We recommend you repeat the entire test process that you performed with test data in Part 1, using your own data. This includes *Testing Email Authorization Requests and Issuing of Licenses*.

Chapter 7: Reports and Administration

Use CasperWeb to generate reports, and carry out administrative tasks.

Administrative and report functions are available in CasperWeb from the Main menu/Admin submenu.

Figure 7-1 Administration menu illustrates the menu you will access to carry out administrative and reporting functions in Casper.

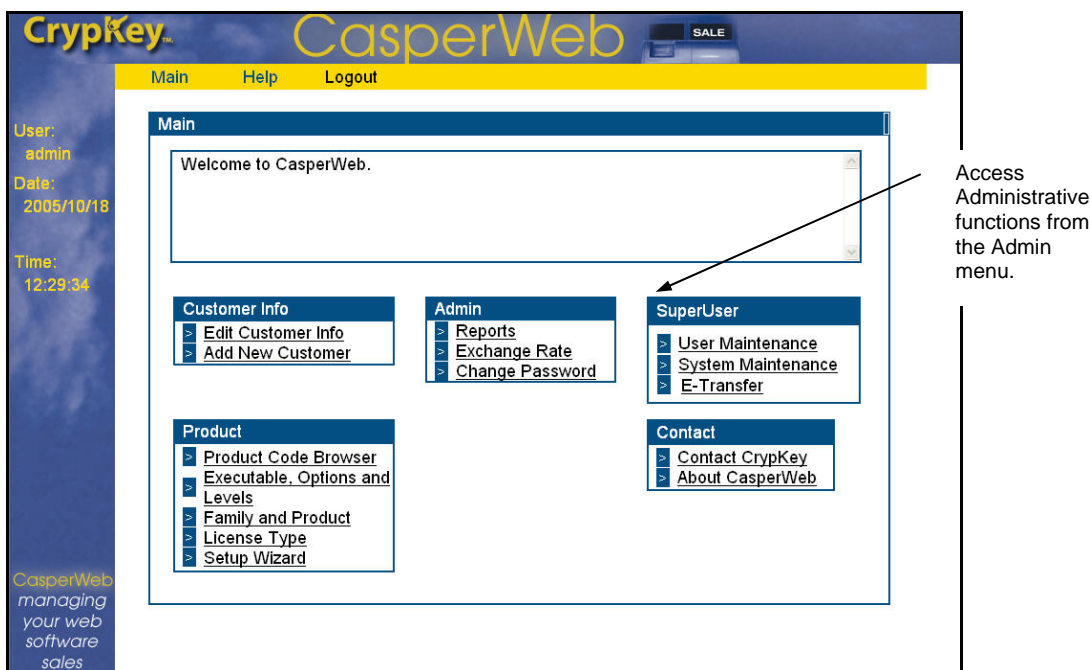


Figure 7-1 Administration menu

Admin Menu

The Administration menu offers these functions:

- Reports – this feature runs reports based on sales, authorizations, expired licenses or Serial Numbers.
- Exchange Rate – this feature applies to credit card authorizations only; see *Part 3: Casper eCommerce*.
- Change Password – this feature allows you to change the user log on passwords. (See *User Maintenance* on page 150 for information on setting up user passwords.)

GENERATE REPORTS

To generate various types of reports based on the data in the Casper database, refer to the following procedure.

Note: All reports are grouped by Product Code.

Procedure

1. Go to the Main menu (see *Log on to CasperWeb* starting on page 68).
2. From the Admin menu, click the Reports link. The Reports screen displays:

Figure 7-2 Reports screen

3. Select a report type (Sales, Authorizations, Expired Licenses, Serial Numbers).

Note: Sales reports are normally used with the Casper eCommerce option, see Part 3 of this manual.

4. Select a reporting period (days, weeks, months, years).
5. Enter the start and end dates of the report in YYYY/MM/DD format.
For example: Start date: 2006/01/04, End Date: 2006/01/31.

Note: The start date cannot be later than the end date.

6. Click **Generate**. The applicable report is displayed: in this example, expired licenses reported by day:

Reports are grouped by Product Code.

Expired Licenses Report By Days						
BasicApp1						
	Exp Date	Pur Date	Company	Customer	Phone #	Serial #
Days						
2005/11/01 - 2005/11/30						
TESTING						
	Exp Date	Pur Date	Company	Customer	Phone #	Serial #
Days						
2005/11/01 - 2005/11/30						

Figure 7-3 Expired Licenses Report by Day

7. To print the report, right-click on the page and select the **Print** option.

Note: Some reports use a landscape orientation.

8. The following figure shows a sample of Serial Numbers reported by day:

Serial Numbers Report By Days (sorted by Serial #)				
BasicApp1				
	Serial #	Company	Customer	Auth Date
Days				
2005/11/01 - 2005/11/30				
TESTING				
	Serial #	Company	Customer	Auth Date
Days				
2005/11/01 - 2005/11/30				

Figure 7-4 Serial Numbers Report by Day

CHANGE USER PASSWORD FROM ADMIN MENU

To change the password of a user, refer to the following procedure. The password is used for logging into CasperWeb.

Note: In order to be able to change passwords, you must be an administrator.

Procedure

You can change passwords from two menus: Admin/Change Password (shown below), or as a function of the SuperUser menu/User Maintenance option.

1. From the Main menu, click on the Change Password link in the Admin menu. The Change Password displays:

The screenshot shows a 'Change Password' dialog box with a dark blue header. Inside, there are three labels on the left: 'User', 'New Password', and 'Retype Password'. The 'User' label is next to a drop-down menu showing 'admin'. The 'New Password' and 'Retype Password' labels are next to empty text input fields. At the bottom, there are two buttons: 'OK' and 'Back'. Three arrows point from text annotations on the right to the form elements: 'Select user.' points to the 'admin' drop-down, 'Enter password, and re-enter to confirm.' points to the 'New Password' field, and 'Click OK.' points to the 'OK' button.

Change Password

User

New Password

Retype Password

OK

Back

Select user.

Enter password, and re-enter to confirm.

Click OK.

Figure 7-5 Change Password – from Admin menu

2. Select the user from the drop-down list for the **User** field.
3. Enter the user's new password.
4. Retype the password.
5. Click **OK**.

Index

This index includes page references for significant occurrences of Casper topics and terms in Part 2.

- add customer
 - required fields 131
- Casper
 - system requirements 68
- Casper software
 - test with your data 168
- CasperWeb
 - definition 149
 - features 63
 - functions 65
 - prerequisites 63, 66
- CrypKey Instant 85
- CrypKey SDK 85
- customer
 - add to Casper database
 - 129
 - history..... 140
 - information..... 65
- developer keys 76
- EasyLicense 163
- encryption key 167
 - for customers..... 167
- error messages..... 73
- exception error message 73
- executables..... 93
 - file name 117
 - version 98
- function buttons..... 71
- import
 - customer information
 - automatically..... 165
- Keys Used/Limit 143
- license
 - issuing procedure 67
 - multi-company 70
- license restrictions
 - and Product Codes 67
- license type
 - add 112
- licensing
 - your Casper software.. 167
- log off 71
- log on 68
- Main menu 71
- option bit 108
- options and levels 65
- password

ODBC database.....	159	Site Code	69
product		Site Key.....	66
and number of versions	82	generation	140, 142
delete information	90	Site Key Generator.....	66
families.....	76	dll	167
information	65, 75	software	
information modification	86	authorizationmethods....	67
number.....	84	vendor	67
Product Code	66	verification	67
add 115		SuperUser	150
associate with executable		system maintenance	
.....	118	functionality	156
delete	126	menu	156
vs. product	76	system requirements.....	68
Product Code Browser	118	technical support	73
renewal license	135	test data	167
reports		user	
by sales.....	173	add 150	
by serial number	174	delete	153
generate.....	172	web services	
search		restart command	168
for customers	137	stop command.....	167
Serial Numbers	67		
and customers	119, 129		
and Product Codes	115		
references customer			
records.....	137		
vendor supplied	67		