Casper User Manual

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PART 2: CASPER eREGISTER

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Chapter 1: Overview of CasperWeb

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

CasperWeb is the management application for the Casper server. It is used to manage items such as executables, products, versions, families, and so on. You can manage hundreds or even thousands of customer and product items in the CasperWeb efficiently, and also 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 CasperWeb 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
  - 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

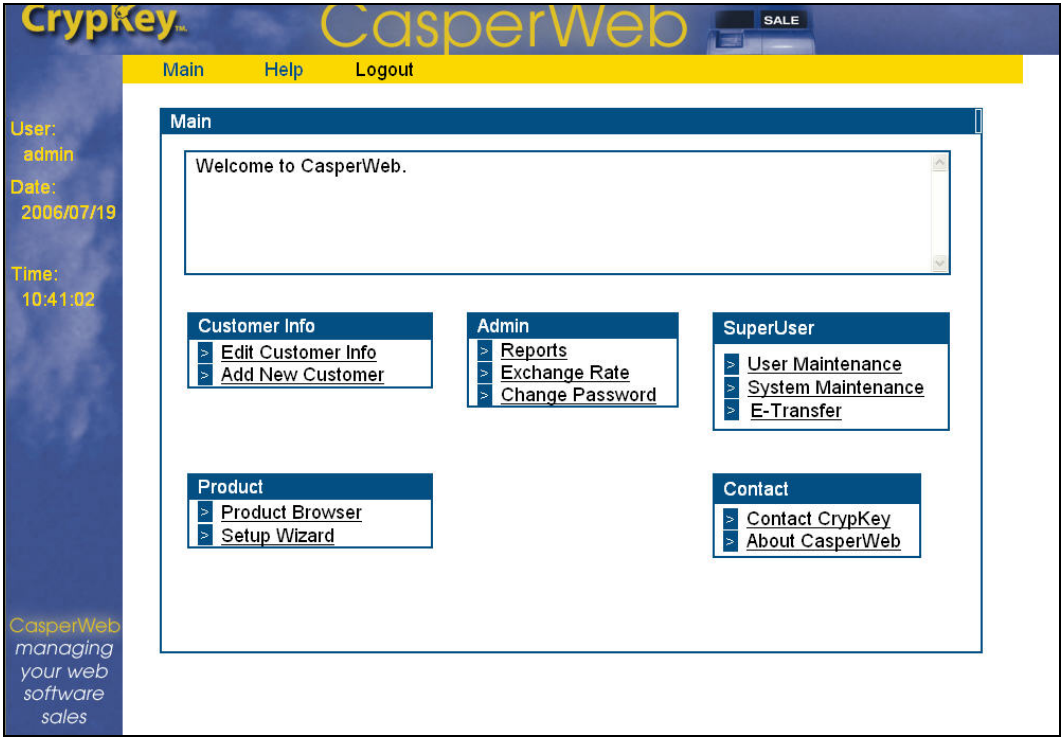


Figure 1-1 CasperWeb Main menu

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 product codes: executable name/filename, password, and product number (see *Product Setup Wizard* on page 115.

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 104 for more information.

PRODUCT CODE

The Product Code is a configuration of product family, product name, executable, 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, and executable 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 to your customers (based on whatever system you choose—see samples in the following sections). Casper only 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 then issues a license, which 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:

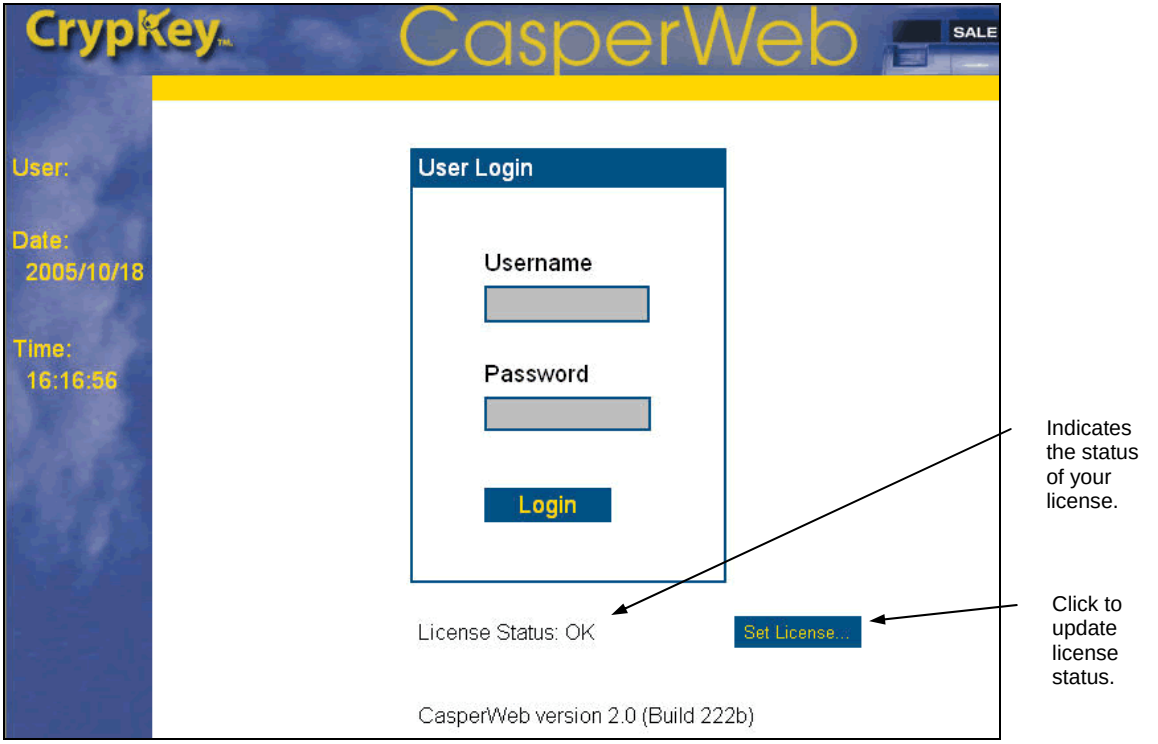


Figure 2-1 CasperWeb Log In screen

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:

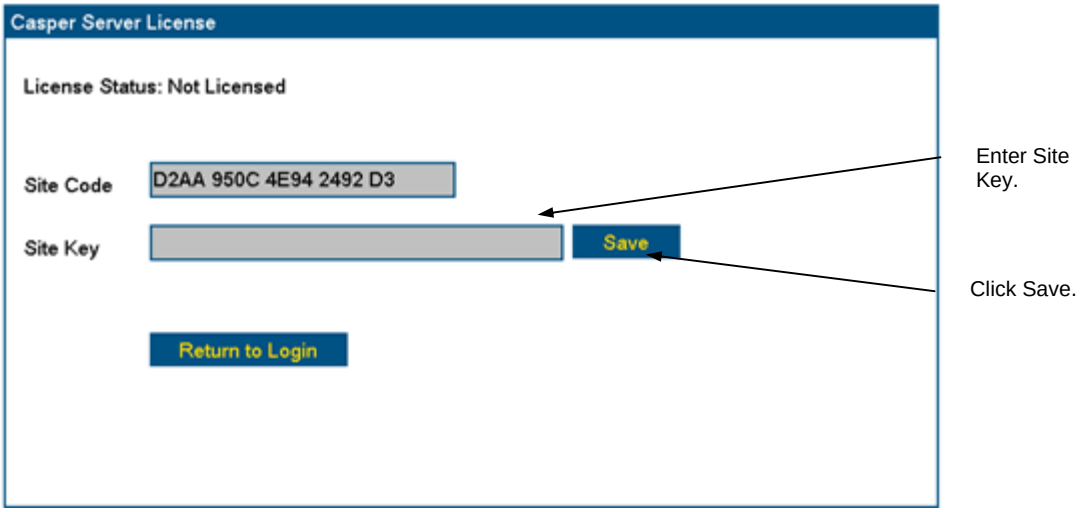


Figure 2-2 License Status window

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 CasperWeb Main menu displays:

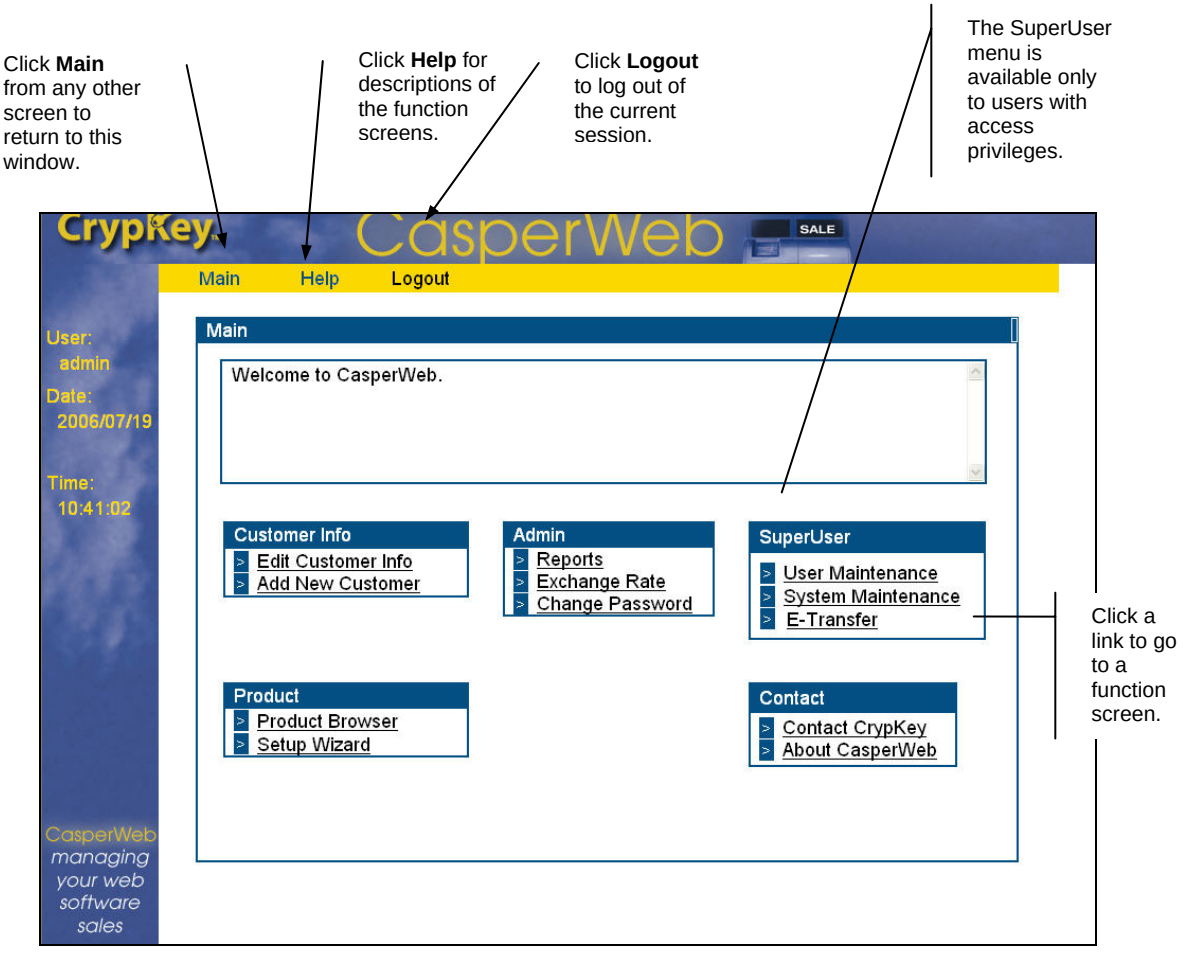


Figure 2-3 Log in to CasperWeb Main menu

9. 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:

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:

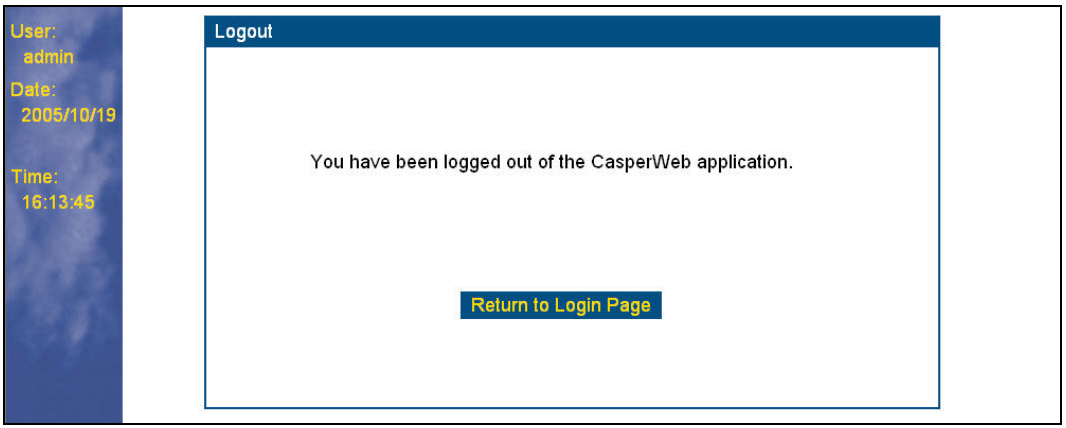


Figure 2-5 Log out message

Navigation in CasperWeb

The CasperWeb 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 CasperWeb Main menu; to go to the CasperWeb 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, or Executable Version 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:

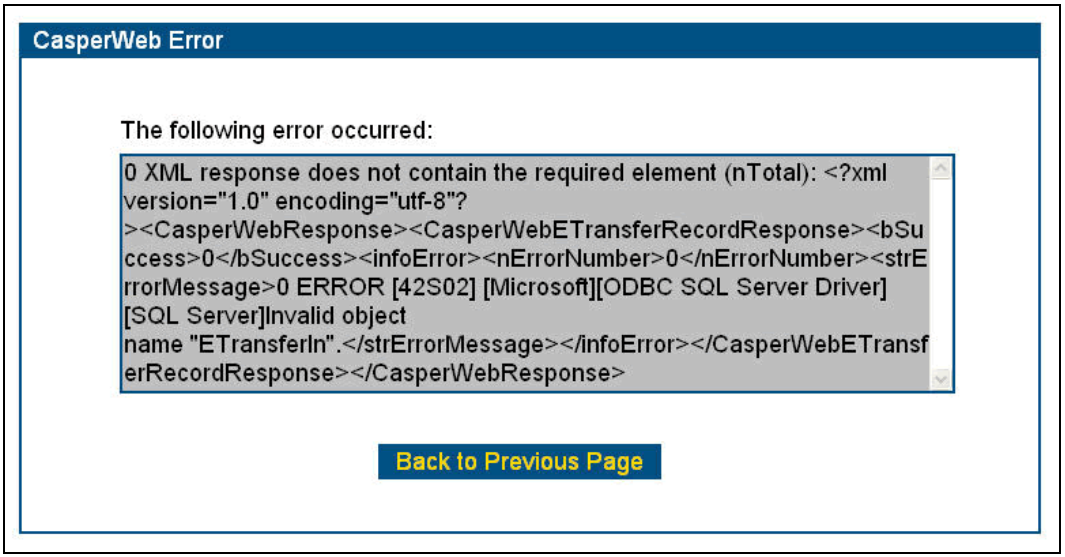


Figure 2-6 Installation from Download password

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:

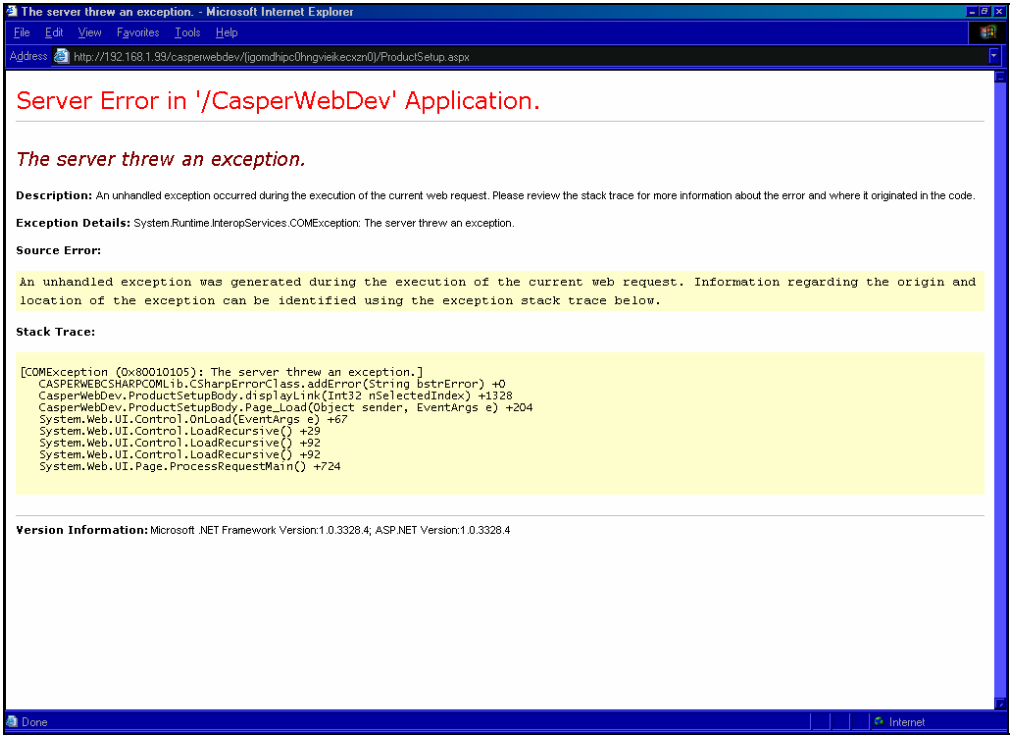


Figure 2-7 Exception Error message

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 manage products
- how to browse and select products from the database
- how product codes are associated with Serial Numbers

Set Up Products

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

- Family (see below) — the overall product category
- Product (see below) — the product name, number, and description
- Product Version (see below) — the name and number of the product release
- Executable (see *Add Executable* on page 97) — the executable name and description
- Executable Version (see *Add Executable Version* on page 101) — the name and number of the executable release
- Product Code (see *Add Product Codes*) — a unique alphanumeric code representing a product and its executable.

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. A product may have more than one Product Code, in order to represent more than one licensing option for that product.

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.

PRODUCT BROWSER

Note: The new Product Browser screen combines these screens from previous versions of CasperWeb:

- Product Browser,
- Executable, Options and Levels
- Family and Product

To go to the Product Browser screen, click the Product Browser link on the Product menu. From one central menu, you can manage all of your products, including executables, versions, families, license restrictions, options, levels, and product codes (see Figure 3-1 Product Browser screen).

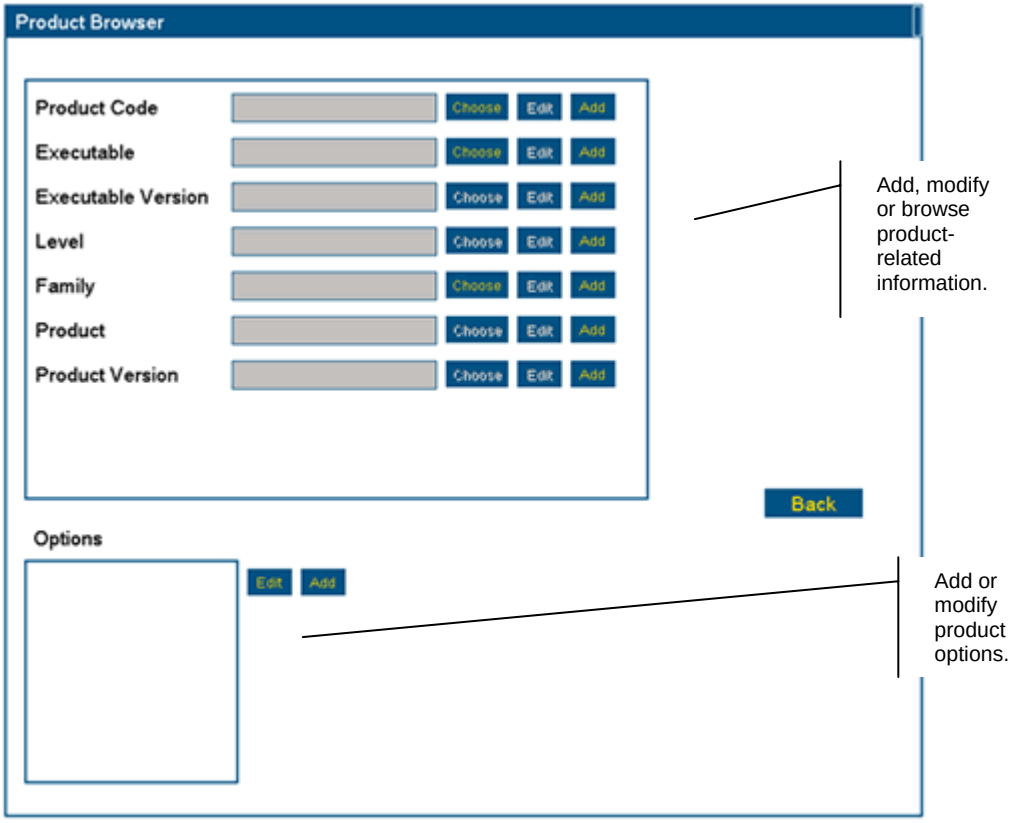


Figure 3-1 Product Browser screen

REQUIRED FIELDS FOR PRODUCTS

Important: Before you can add a Product Code, all of the mandatory fields in the Product area on the Product Browser screen must be filled in. The Product Code wil be associated with these items (executable, family, product and so on). Therefore, we recommend that you take the time to plan your product categories and how they will be associated with product codes. See Add Product Codes on page 114 for more information.

PRODUCT BROWSER FUNCTION BUTTONS

To add a new item, click the **Add** button.

Before you can **Edit** an item, you will browse and select it using the **Choose** button. Once an item is selected, click the **Edit** button to modify it.

The **Choose** button replaces the drop-down menu selector in previous versions of CasperWeb. This button allows you to browse the Casper database and select specific items. You can scroll through all available options, thus giving you many more manageable options.

When a button is not usable, it is greyed out. For example, if you haven't added any products, you won't be able to select the **Choose** button for products. If you haven't chosen a Family and Product, you will not be able to choose its Product Version for viewing or editing.

The following figure shows an example of how the Choose function is used to select a Product Code. Other screens which offer the Choose function work in a similar way.

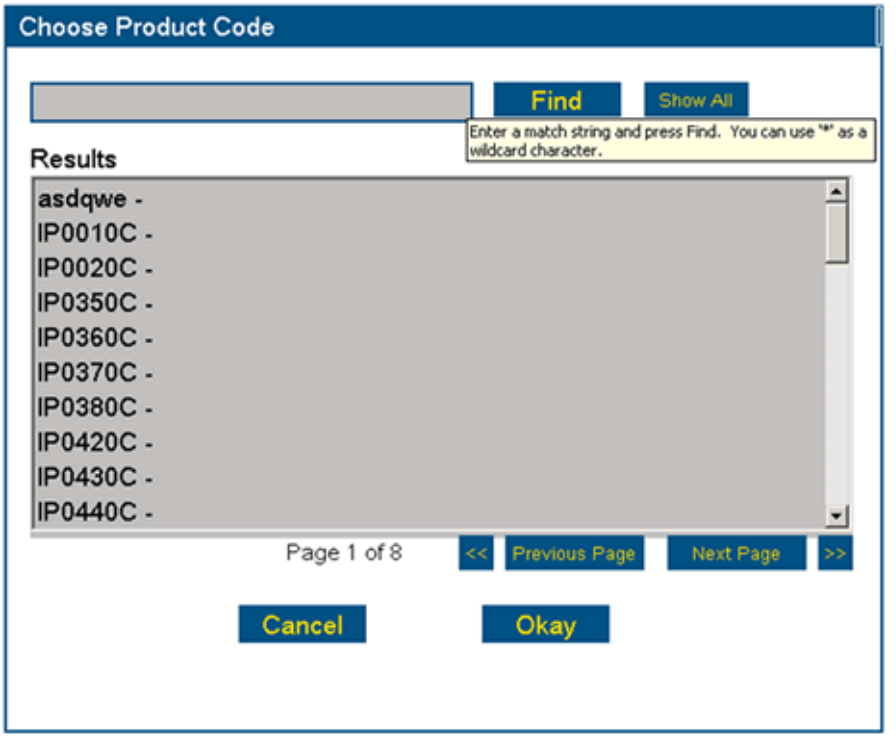


Figure 3-2 Choose Product Code

The results are displayed in alphanumeric order.

To refine your search, enter a match string and click **Find**. The asterisk character (*) can be used as a wild card. To clear the results and display all items again, click **Show All**.

To choose a result, highlight it. **Okay** accepts your choice; **Cancel** deselects it. Both actions return you to the previous screen you were working on.

MULTIPLE PAGES

A maximum of 50 items are displayed per page. Navigate through multiple pages of results as follows:

<<	jumps back 5 pages
>>	jumps ahead 5 pages
Previous Page:	goes to the previous page
Next Page:	goes to the next page

ADD PRODUCT INFORMATION

Procedure

This section describes how to add one or more families, products and product versions to CasperWeb.

Before you set up 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 (see Product Setup Wizard on page 115.

1. Go to the CasperWeb Main menu (see Log on to CasperWeb on page 68).
2. Under the Product menu, click **Product Browser**. The Product Browser screen is displayed:
3. Beside the **Family** box, click **Add** to add a new family of products.

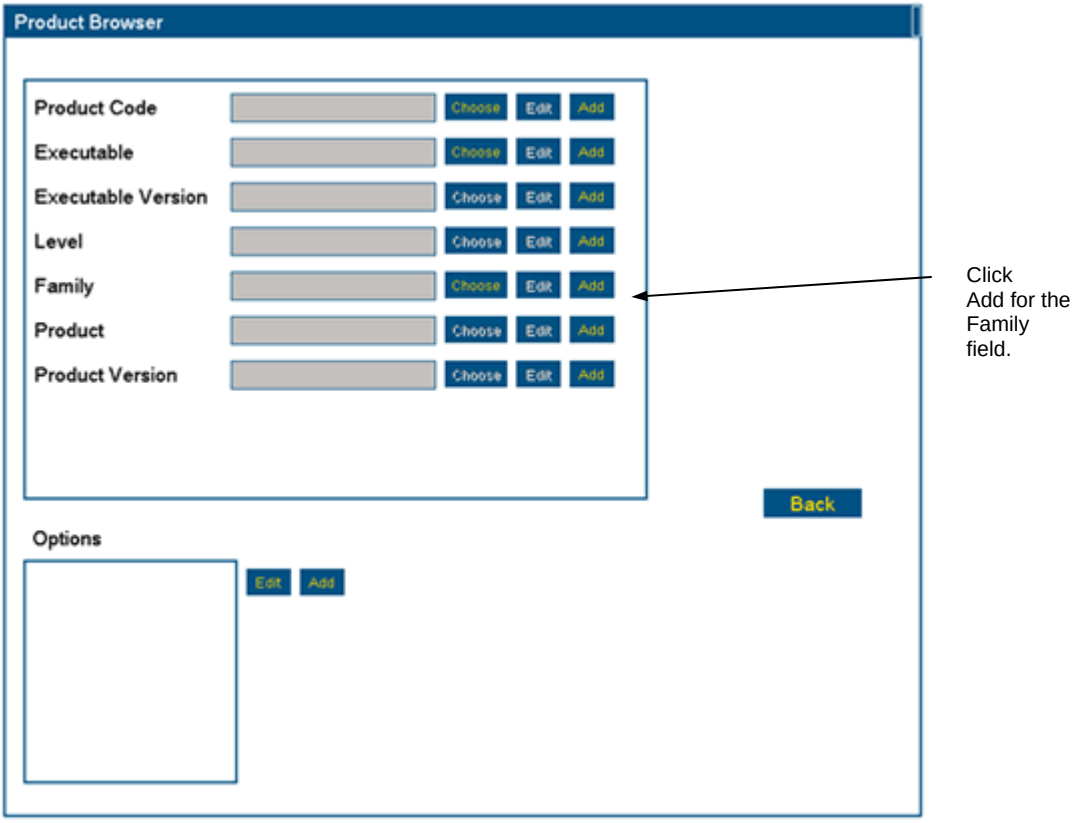


Figure 3-3 Product Browser -- Add Family

4. CasperWeb displays the Add Family screen.
5. Enter the name and description for the new product family. The screen below shows an example:

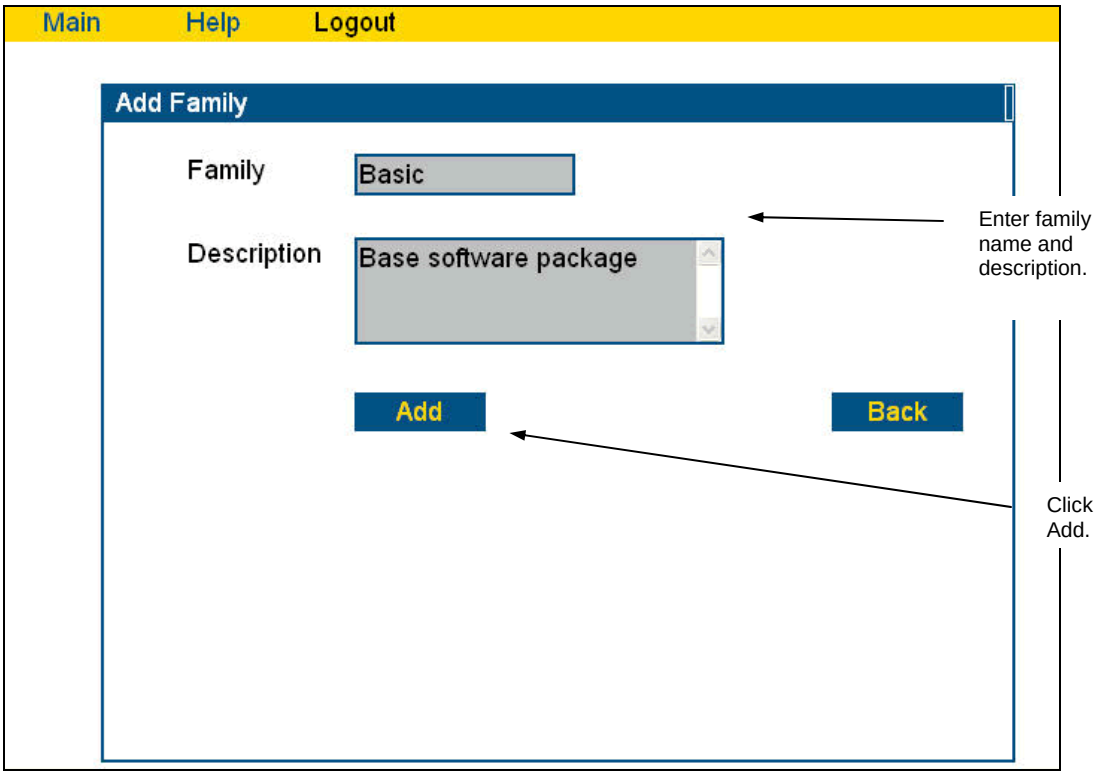


Figure 3-4 Add Family

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

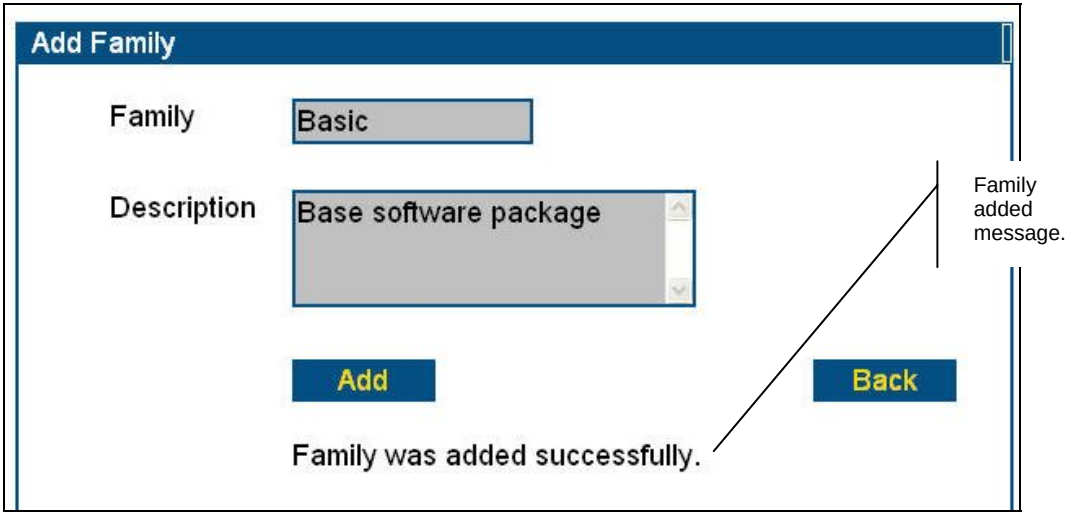


Figure 3-5 Add Family message

7. Click **Back** to return to the Product Browser 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 91.) You cannot delete a product if a Serial Number has been associated with it.
9. Click the **Choose** button beside the **Family** box. The Choose Family screen appears:

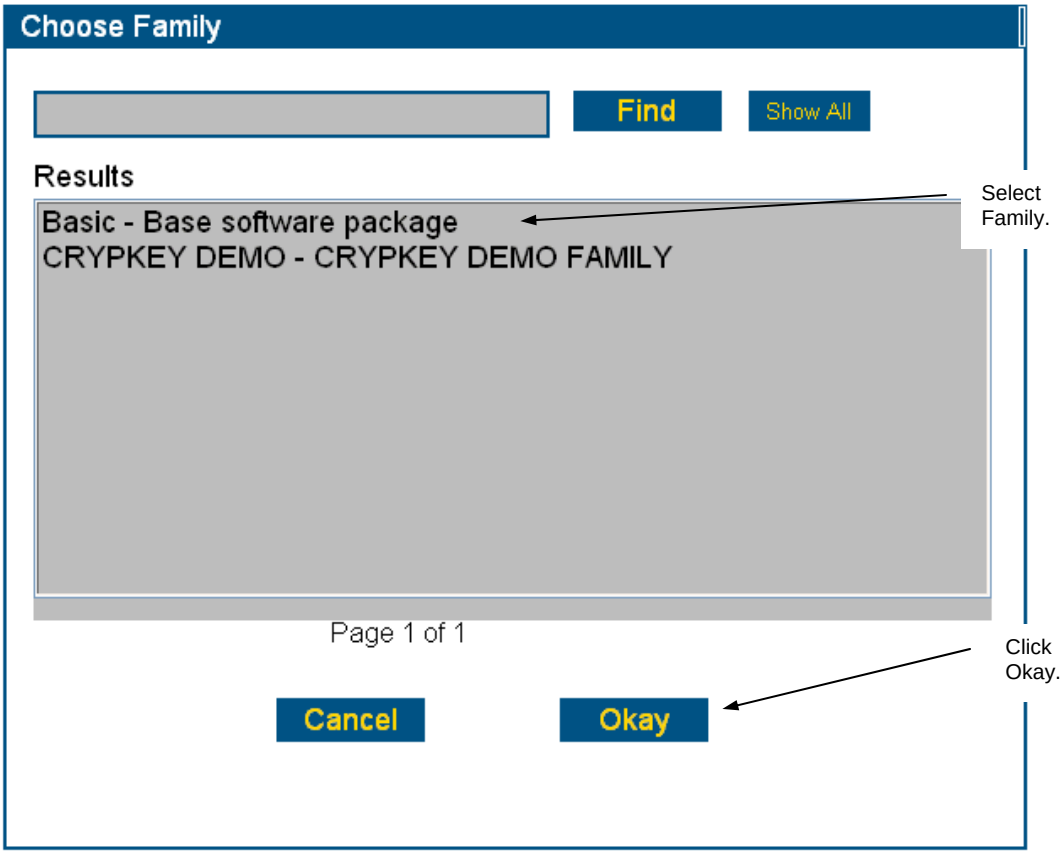


Figure 3-6 Choose Family

10. Select the family from the results list, or enter the name of a family in the empty box and click **Find** to do a search.
11. Click on the family you want to work with to highlight it.
12. Click **Okay**. The Product Browser screen displays the chosen family:

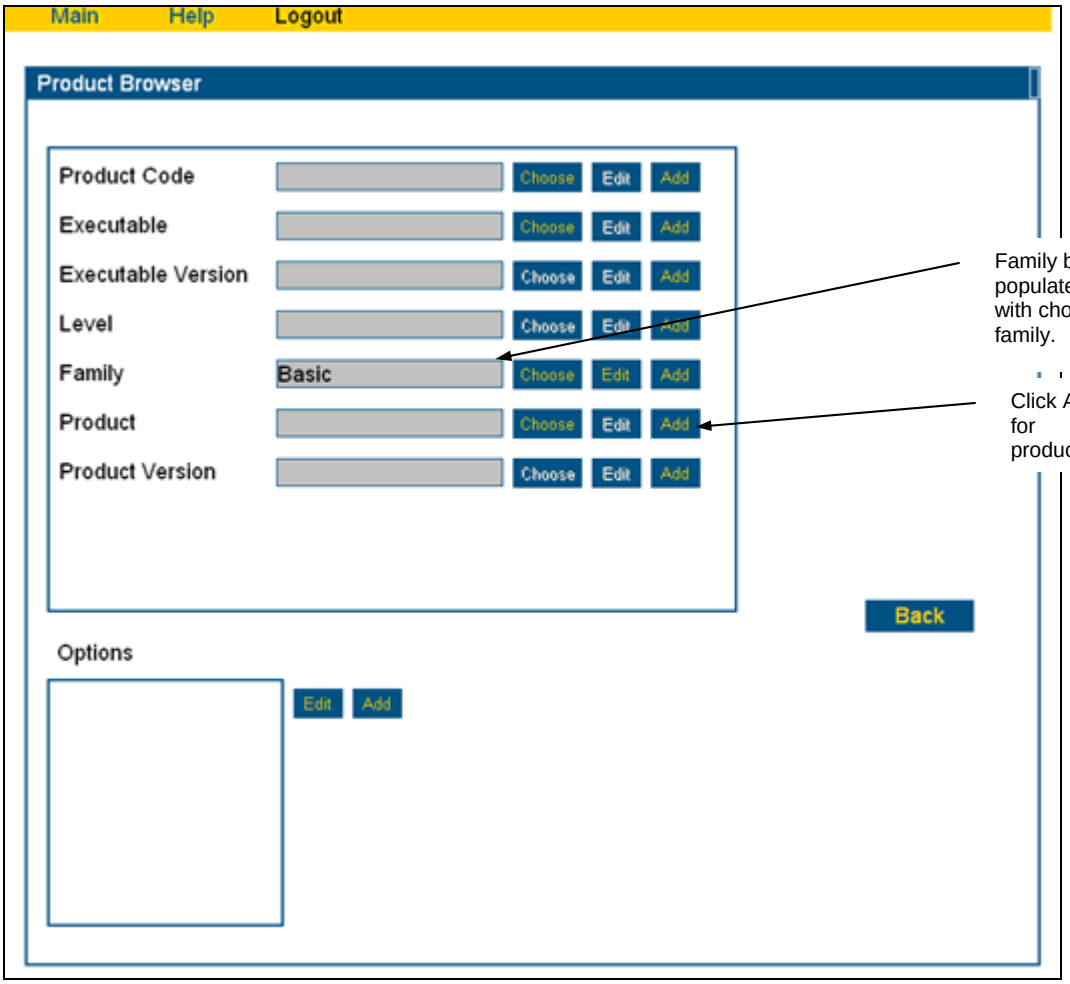


Figure 3-7 Product Browser with selected Family

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

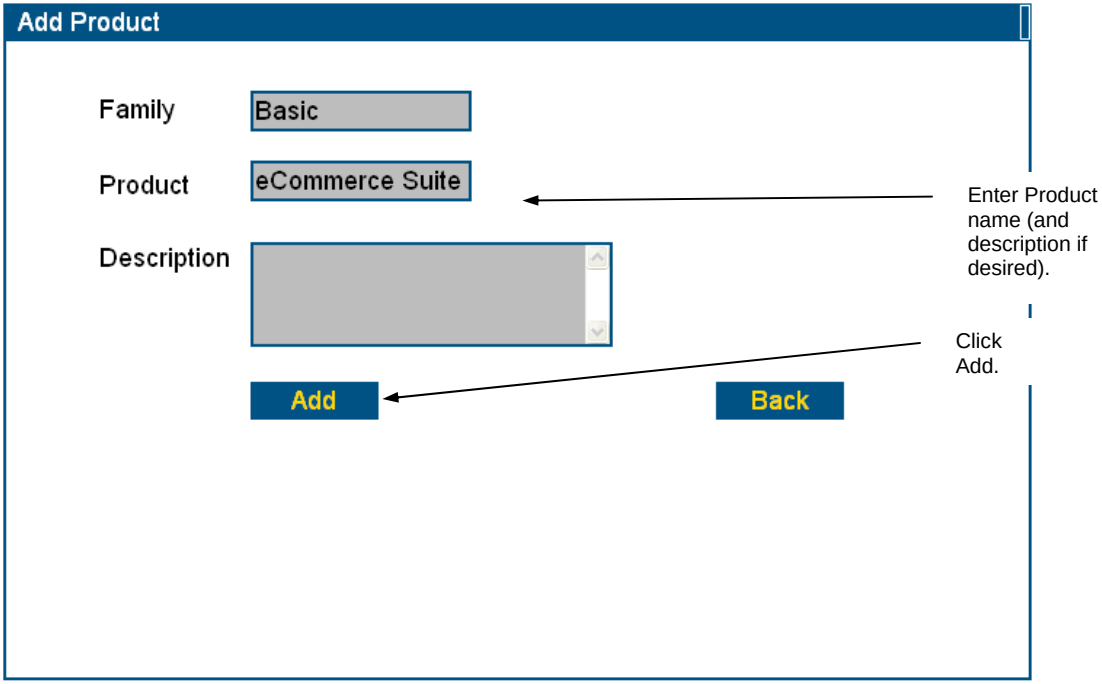


Figure 3-8 Add Product screen

14. Enter the name of the product in the **Product** box.
15. Enter a description of the product (optional).
16. Click **Add**. If the action was successful, CasperWeb displays a message at the bottom of the Add Product screen:

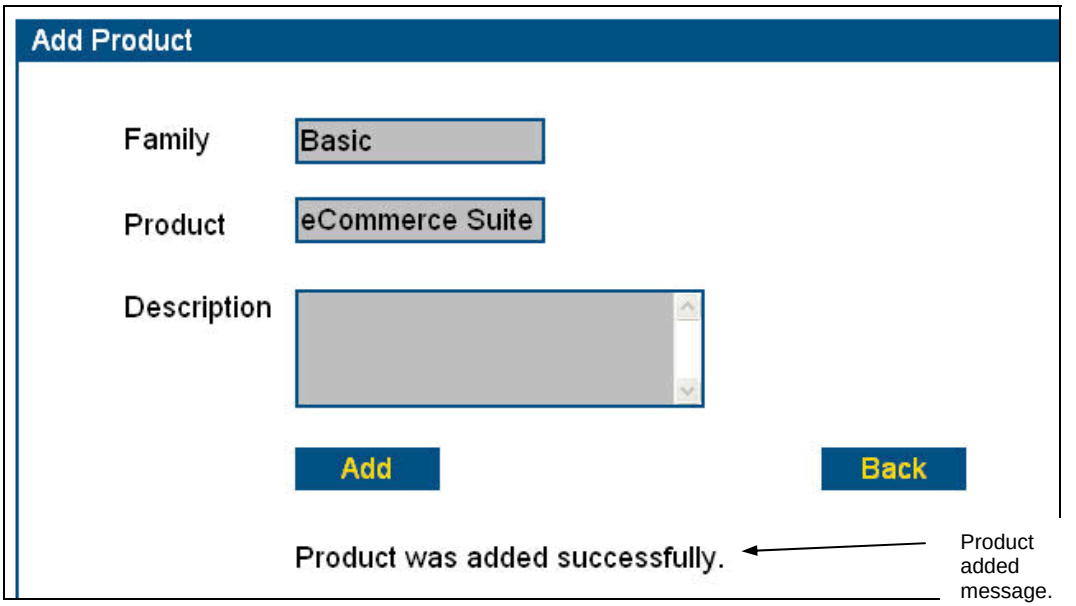


Figure 3-9 Product added successfully

17. Click the **Back** button to return to the Product Browser.

    Note: The Product box is not automatically populated with the new product.

18. Now you may add the version of this product.

    Note: CasperWeb will accept multiple versions of a product.

19. From the Product Browser screen, click **Choose** beside the Product box:

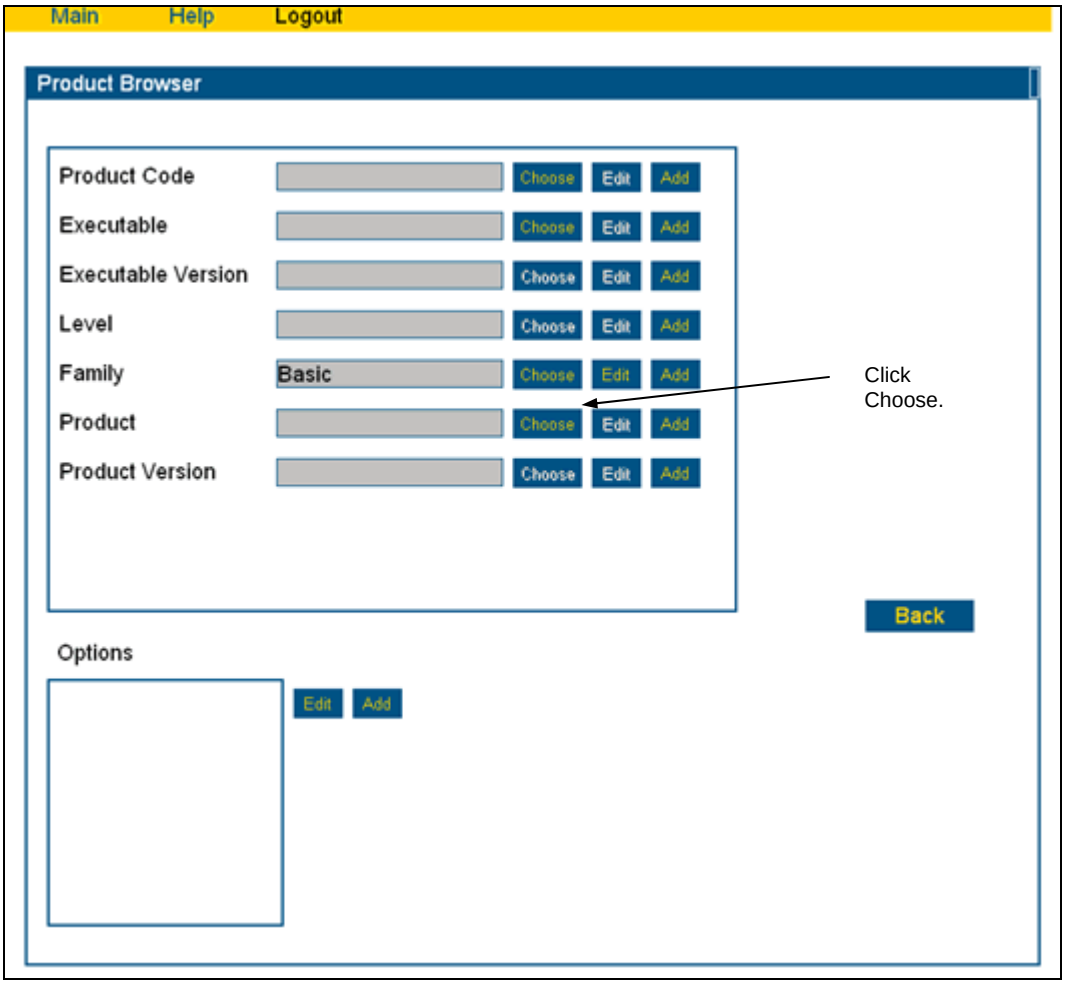


Figure 3-10 Choose Product

20. The Choose Product screen is displayed. Select the product you have just created. You will be returned to the Product Browser screen.

21. Now click **Add** beside the Product Version box. The Add Product Version screen displays:

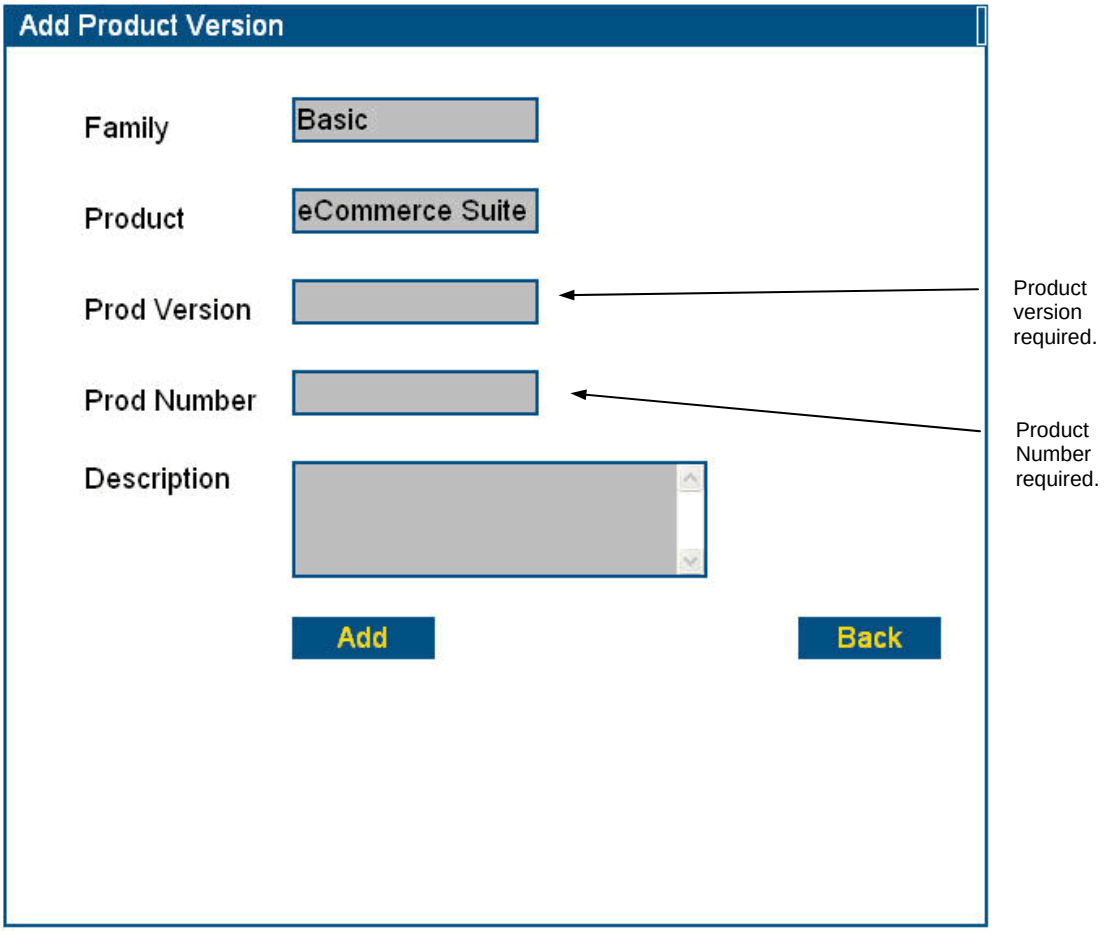


Figure 3-11 Add Product Version screen

22. You must enter both the Product Version and Product Number. If you leave the Product Version box empty, you will see an error message similar to the following:

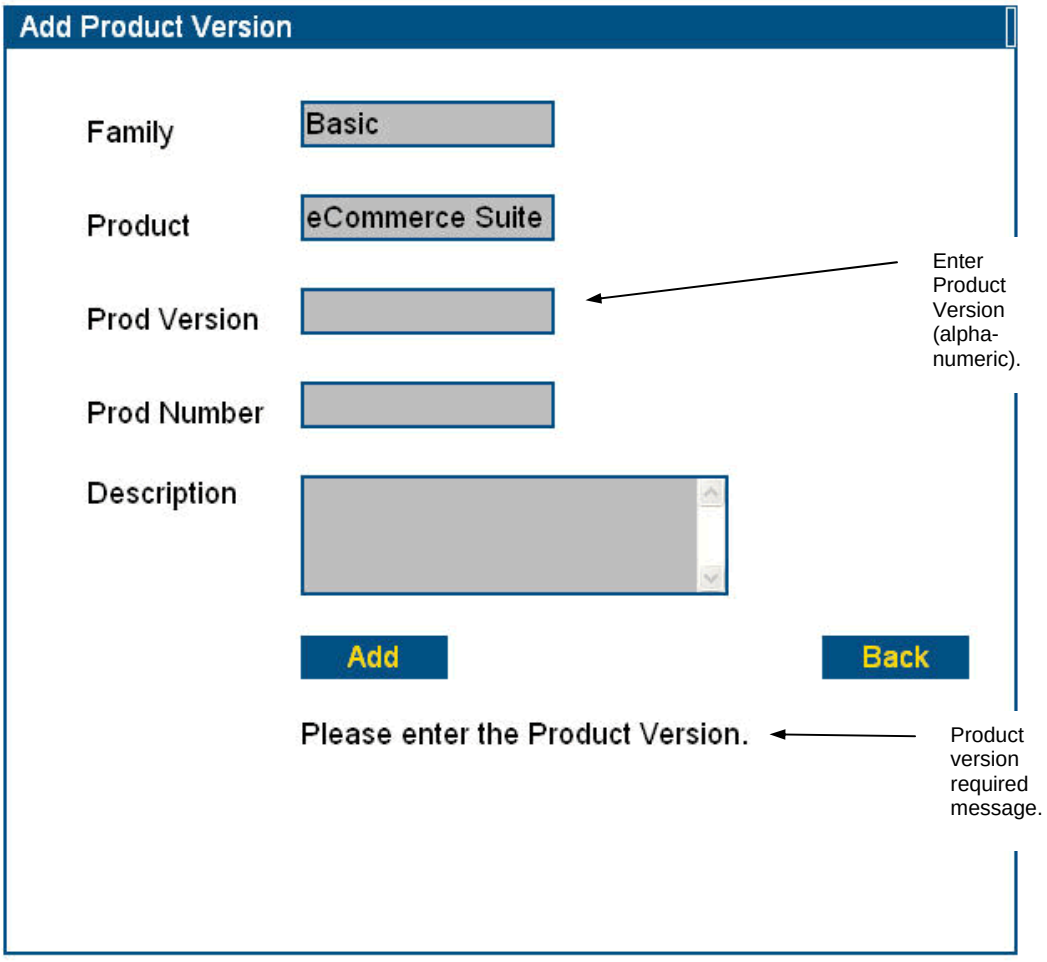


Figure 3-12 Add Product Version message

23. Enter the Product Version (alphanumeric).
24. If you click **Add** without first entering the Product Number, you will see an error message similar to the following:

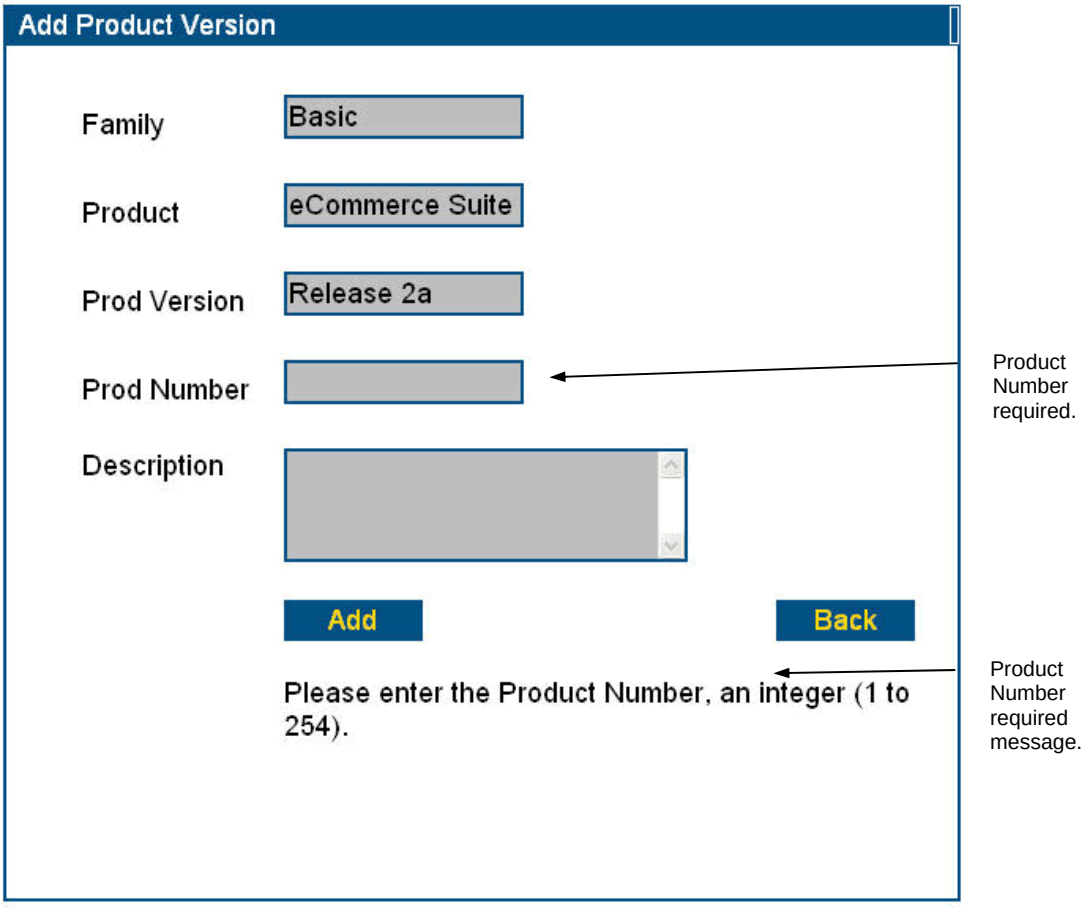


Figure 3-13 Add Product Number message

25. 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.

26. Click **Add**.

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

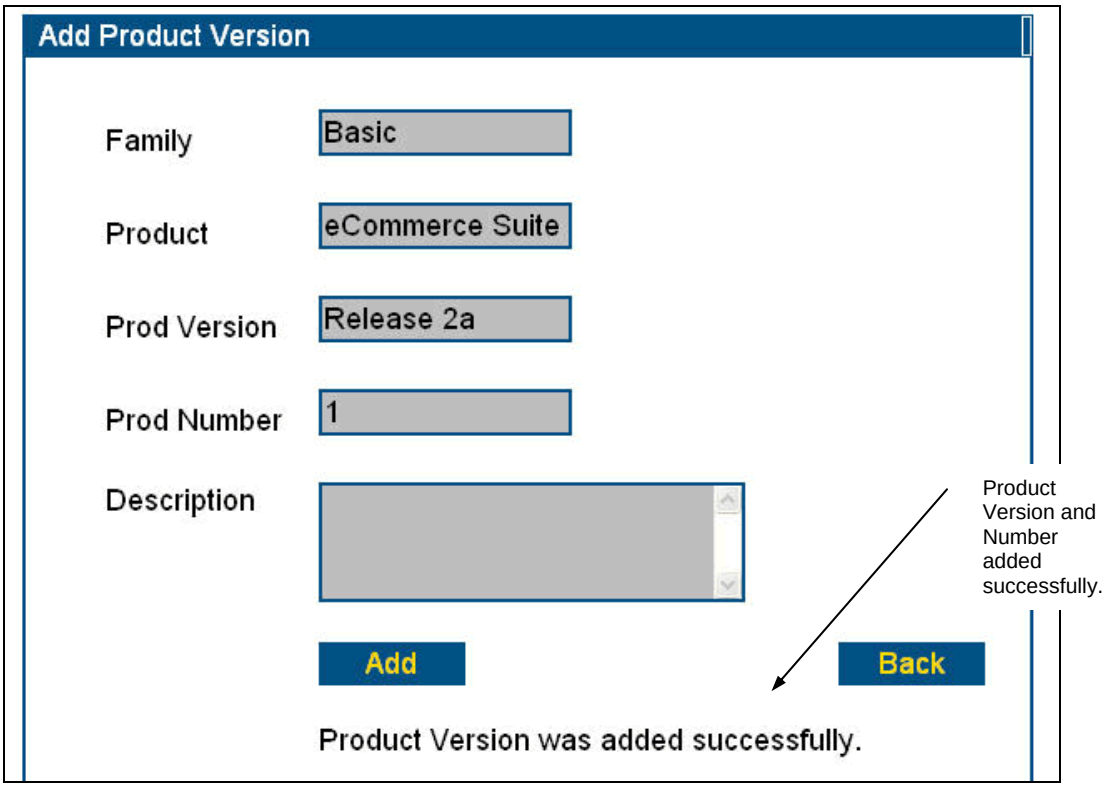


Figure 3-14 Add Product Version and Number message

28. Click **Back** to return to the Family and Product screen.
29. 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 just entered.
30. Continue adding families and product information until you have added all the products and product categories you wish to store in the Casper database.

MODIFY PRODUCT INFORMATION

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

Procedure – Modify Product Description

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

1. Go to the Product Browser screen (see Add Product Information on page 79 for navigation instructions).
2. **Choose** the Family (you can't select a Product until you choose the family).
3. Click **Choose** beside the Product box.
4. From the Choose Product screen, select the product you want to modify.
5. Now click **Edit** beside the Product box. The Edit Product screen displays:

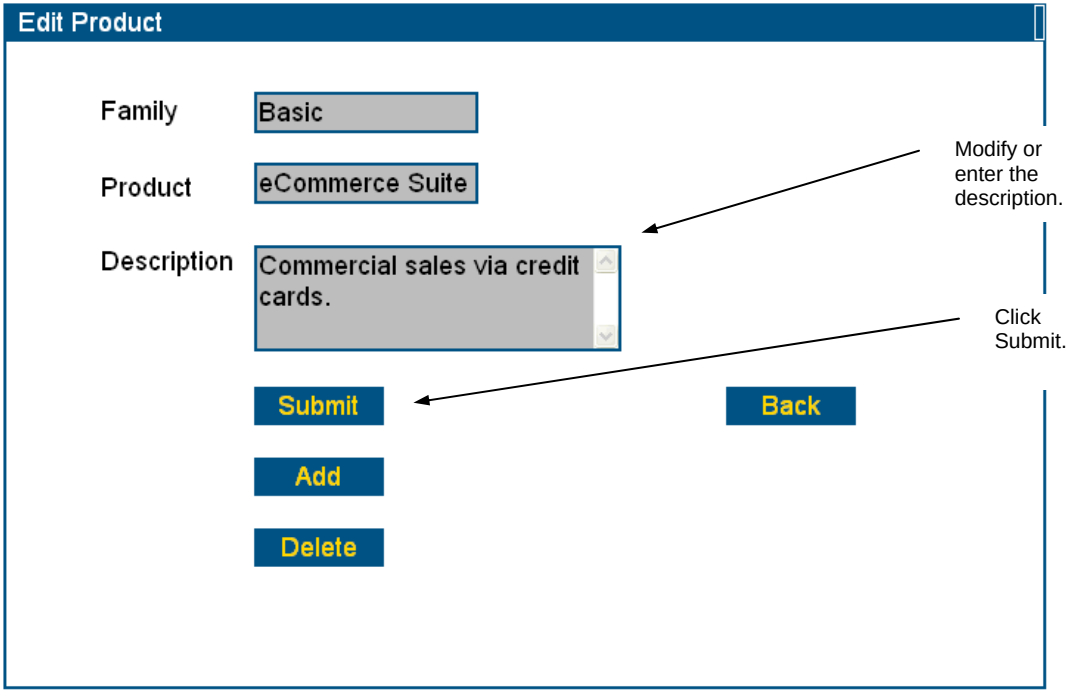


Figure 3-15 Edit Product description

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

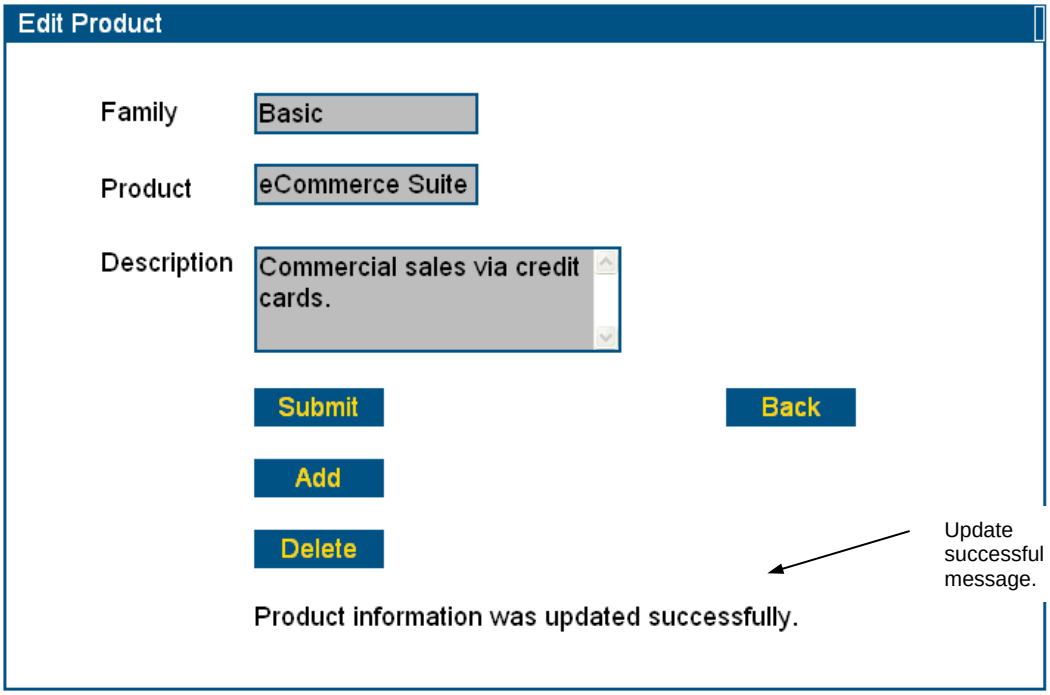


Figure 3-16 Product Description updated message

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

Procedure – Modify Product Version Fields

Note: You cannot modify the Product Version itself from this screen, only its related fields (Product Number and Description). To modify a Product Version, you must delete it, then Add a revised Version. Follow the steps in the section Delete Product Information below.

1. From the Product Browser screen, **Choose** the Family and Product for the Product Version to be modified.
2. Click **Edit** beside the Product Version field.
3. Modify the Product Number and/or description for this version of the product.
4. Click **Submit**. CasperWeb displays a successful update message similar to the following:

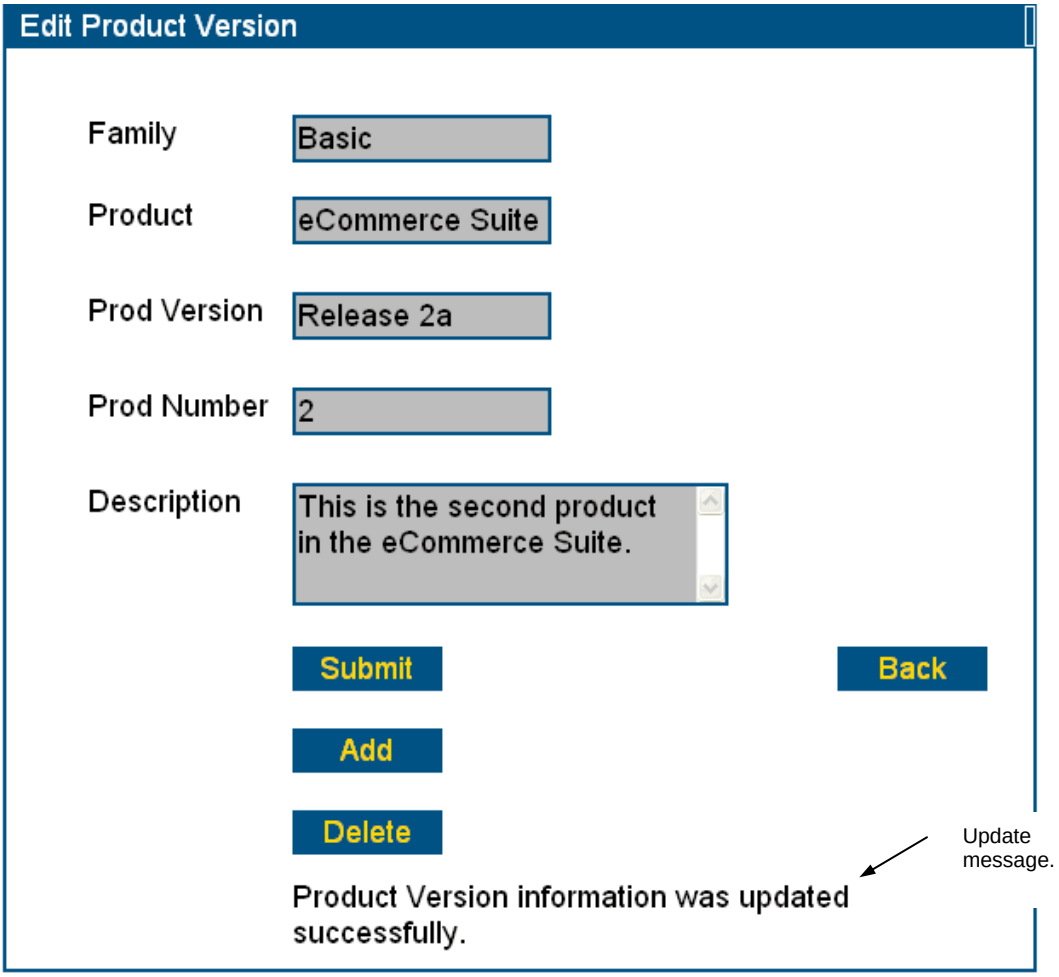


Figure 3-17 Product Number Description updated

5. Click **Back** to return to the Product Browser screen.

DELETE PRODUCT INFORMATION

Use the following method to delete any of the product-related information (e.g. Family, Product, Product Version).

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 3-18 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 Product Browser screen.
2. Select the Family and Product using the **Choose** button.
3. Click **Edit** beside the Product box. The Edit Product screen displays:

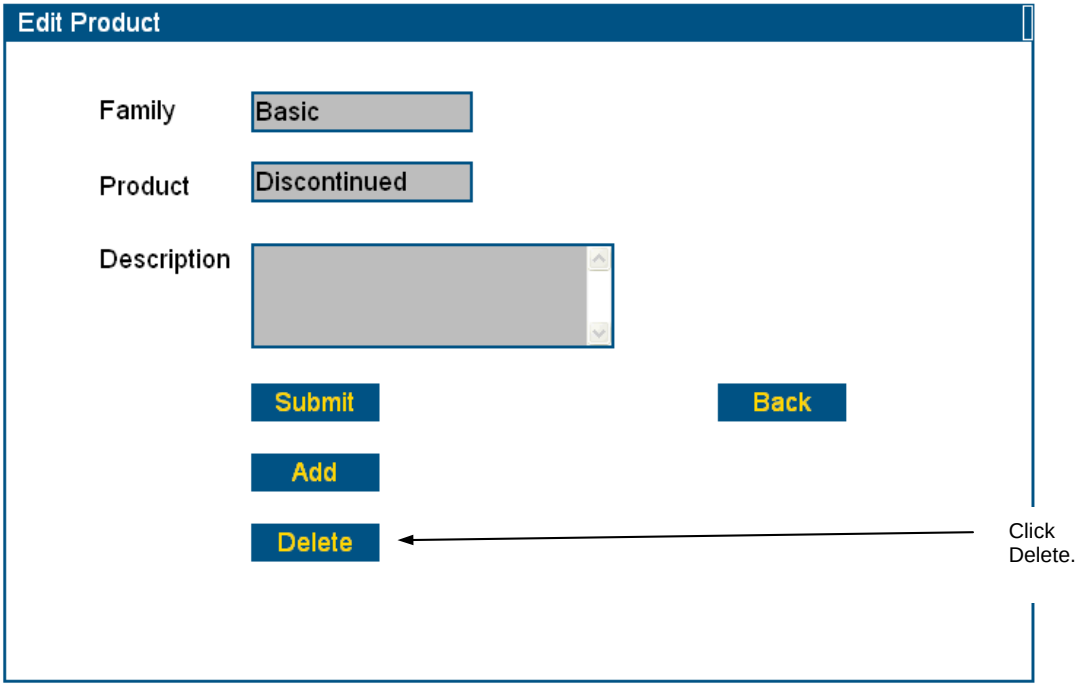


Figure 3-19 Delete Product

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

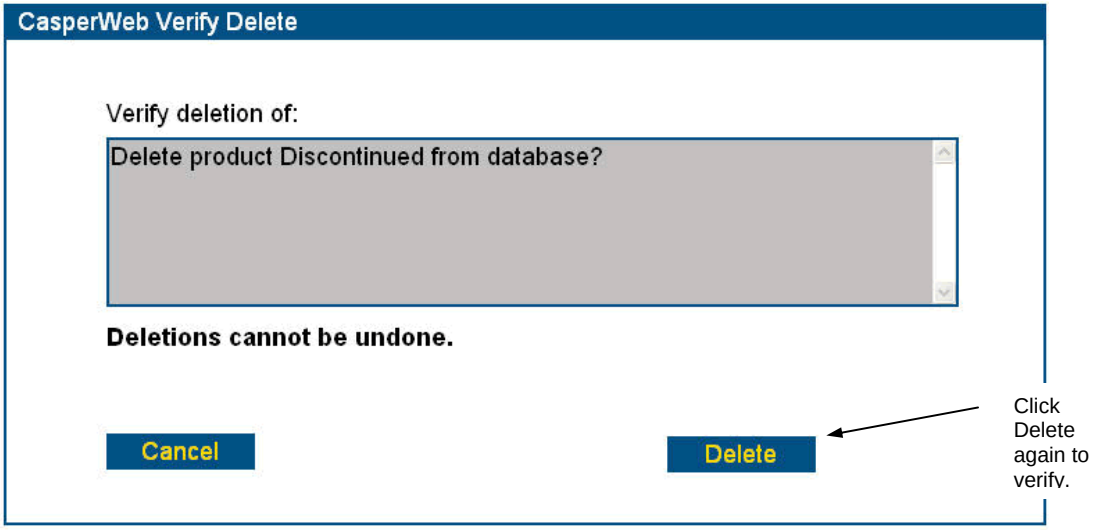


Figure 3-20 Verify deletion dialog box

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.

Note: You can use the above procedure to delete other items, 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 , Levels, and Options

This section shows you how to add and configure executables, levels, and options.

- Executables – mandatory
- Levels – optional
- Options - optional

ADD EXECUTABLE

In order to license a product, you must assign an executable ID to it. Only one executable can be assigned per Product Code.

You need to set up both an Executable (the name of the file) and an Executable Version. Both types of record are required.

Procedure – Define an Executable

1. Go to the CasperWeb Main menu (see Log on to CasperWeb on page 68).
2. From the Product menu, select the Product Browser link. The Product Browser screen will be displayed.
3. Click **Add** beside the Executable box. The Add Executable screen displays:

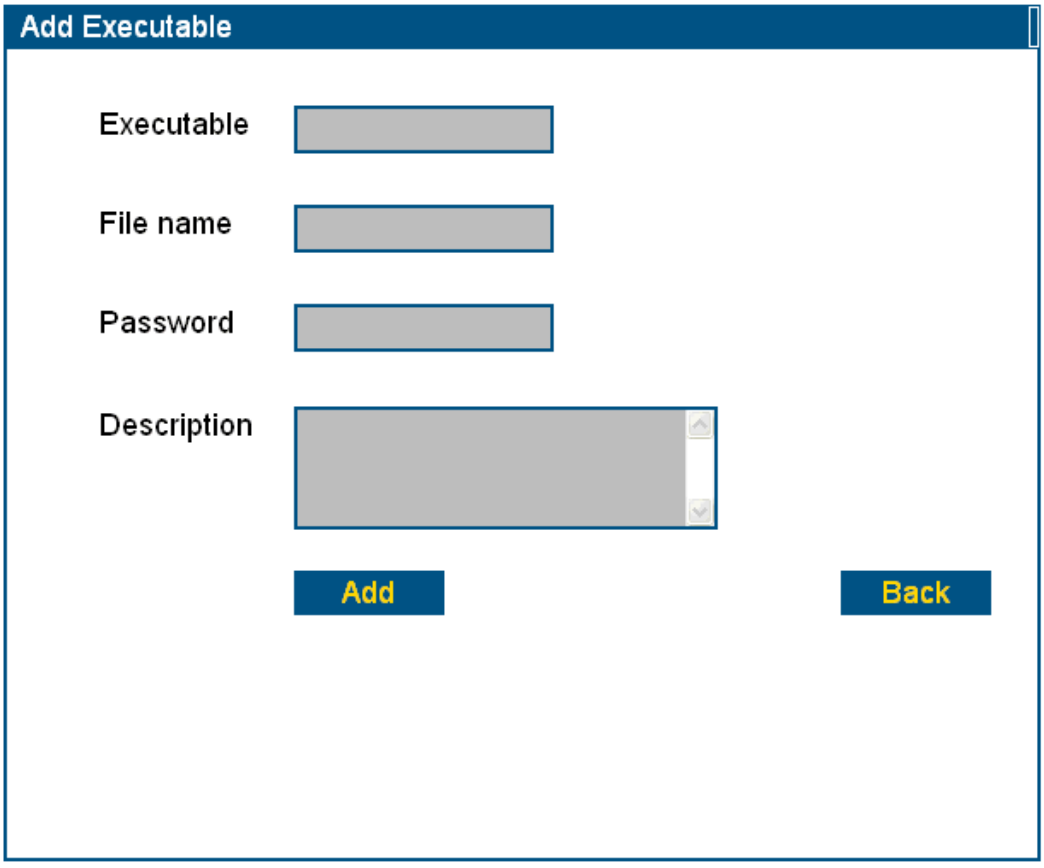


Figure 3-21 Add Executable screen

4. 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

Field	Description
	obtained developer keys for your 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.

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

   Note: The filename must be the *exactly the same* as you gave to CrypKey to obtain your developer keys for this product.
7. Enter the executable password.
8. 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**.
9. 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):

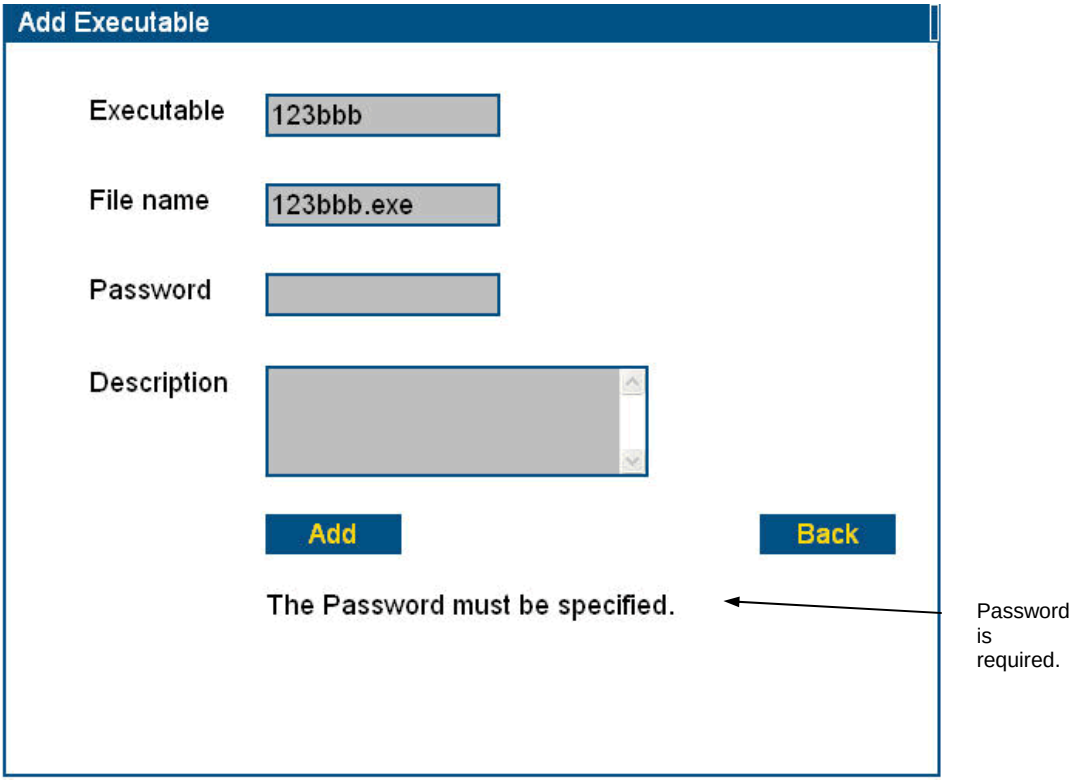


Figure 3-22 Password required message

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

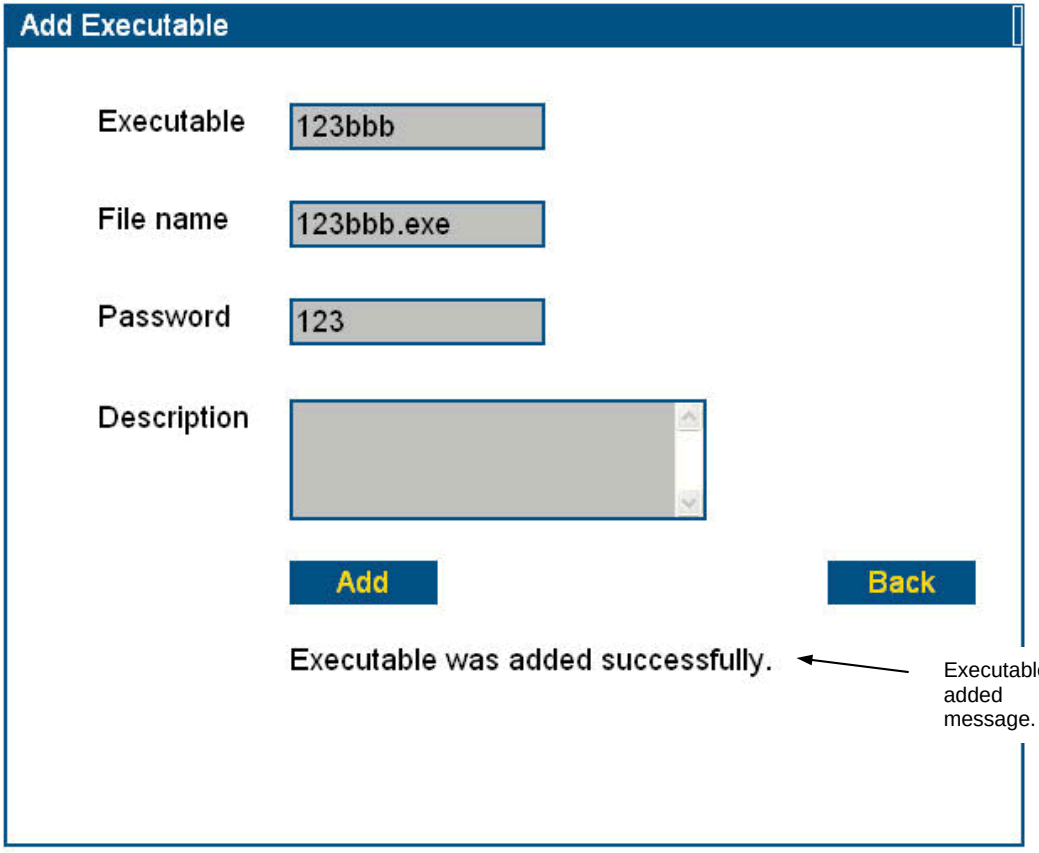


Figure 3-23 Executable added message

11. Click **Back** to return to the Product Browser screen.

ADD EXECUTABLE VERSION

As well as being assigned an Executable ID, a Product Code must also reference the version of the Executable.

Procedure – Define an Executable Version

1. From the Product Browser screen, click **Choose** to select the Executable you just added (if it is not already visible in the Executable box).
2. Click **Add** beside the Executable Version box. The Add Executable Version screen displays:

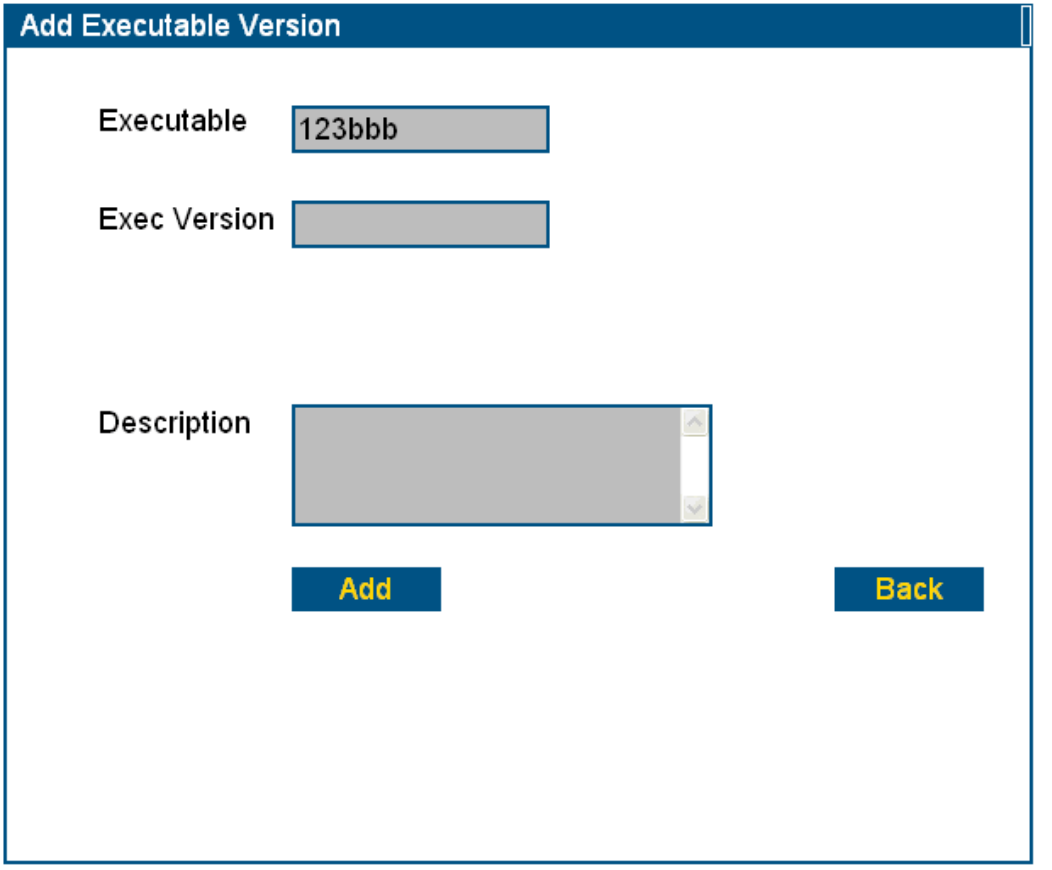


Figure 3-24 Add Executable Version screen

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

4.

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
Description	Enter an alphanumeric description of the executable version (optional).

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

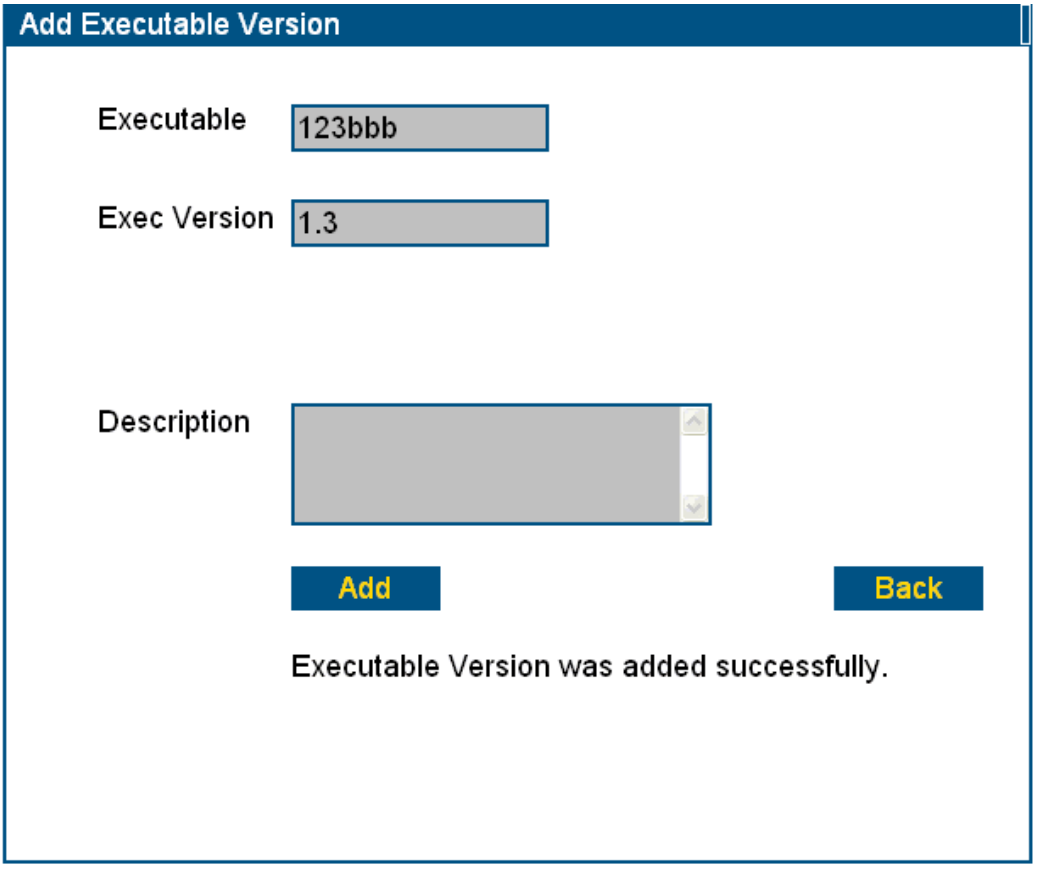


Figure 3-25 Executable Version Added message

8. Click **Back** to return to the Product Browser screen.

ADD OPTIONS AND LEVELS

Options and Levels are used to define features that you want to release with a given executable. Options and levels specified for the executable apply to its related product.

Note: The product is represented by its Product Code in the Product Browser screen.

The license issued to the customer for the product code will incorporate any defined options and levels by default. The serial number defined for a product code defines any options and levels at the product code level by default. These options and levels can be changed on a individual serial number basis after the serial number and product code are imported, but generally they are specified at a product code level..

Options and Levels give you flexibility in defining various features of an application for distribution in packages or specific configurations. Options are Levels are optional. 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 Browser *before* associating them with a Product Code, in a Serial Number record, or in the Site Key Generator**. Options and Levels can be modified at the time of Serial Number creation or Site Key generation (see above description).

OPTIONS

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.

Define the key types of Option information as follows:

- 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.

When authorizing a product using Casper (automatic method) or the Site Key Generator (manual method), you must provide a setting ("on" or "off") for all options defined for the product (i.e., checked = on, unchecked = off). You can do so using the Product Browser from the Add or Edit screen, when creating the product code. If not done at that point, options can be turned on either through the Site Key Generator or from the Edit Customer information page for the specific serial number.

Note: A maximum of 32 bits are available for options and levels combined (per product).

LEVELS

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.

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 Product Browser screen.
2. Click **Choose** for the **Executable** and **Executable Version fields** and select them. You are then returned to the Product Browser screen.
3. Click **Add** beside the Level box. The Add Level screen displays:

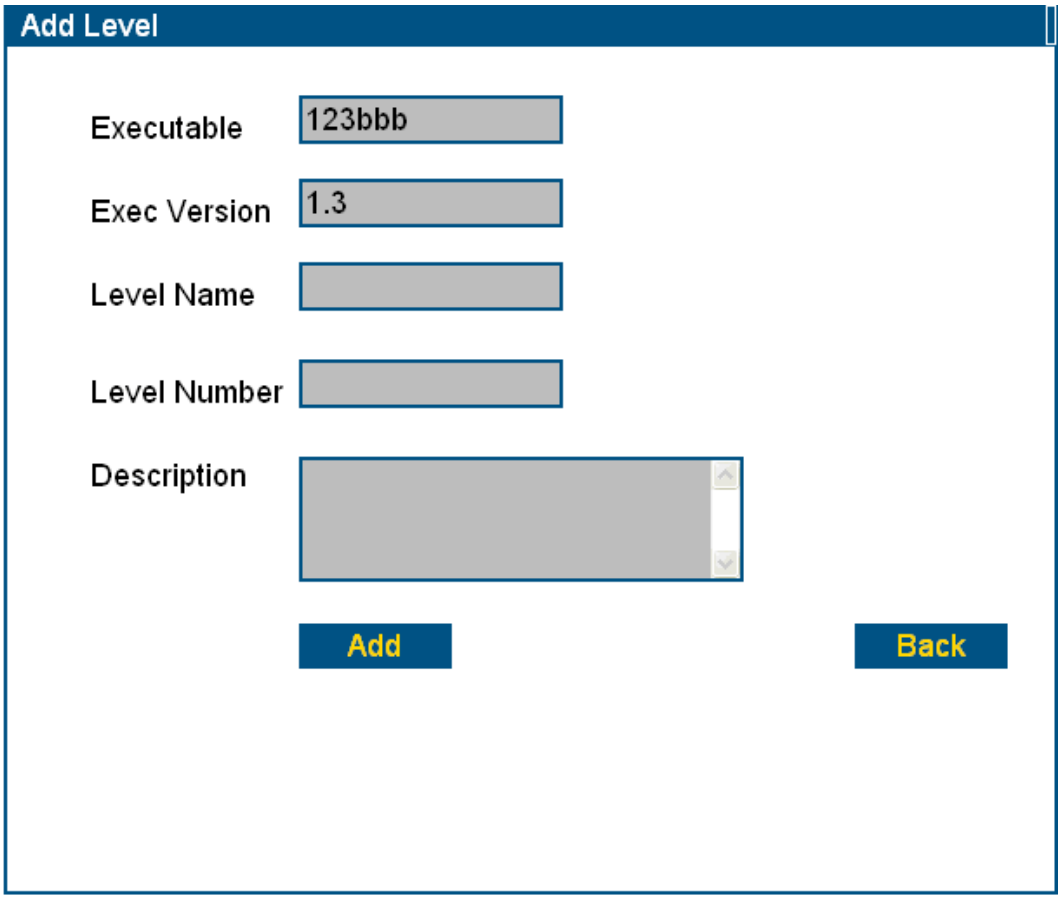


Figure 3-26 Add Level screen

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

Table 3-3: Levels -- Data Entry Fields

Field	Description
Level Name	Controls a variety of features in your product, or for version control (see above in this section for more information). Format: 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 level.
6. In the Level Number box, enter the number of the 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 Level box in the Product Browser screen.
8. Click **Add**. If the action was successful, CasperWeb displays a message similar to the following:

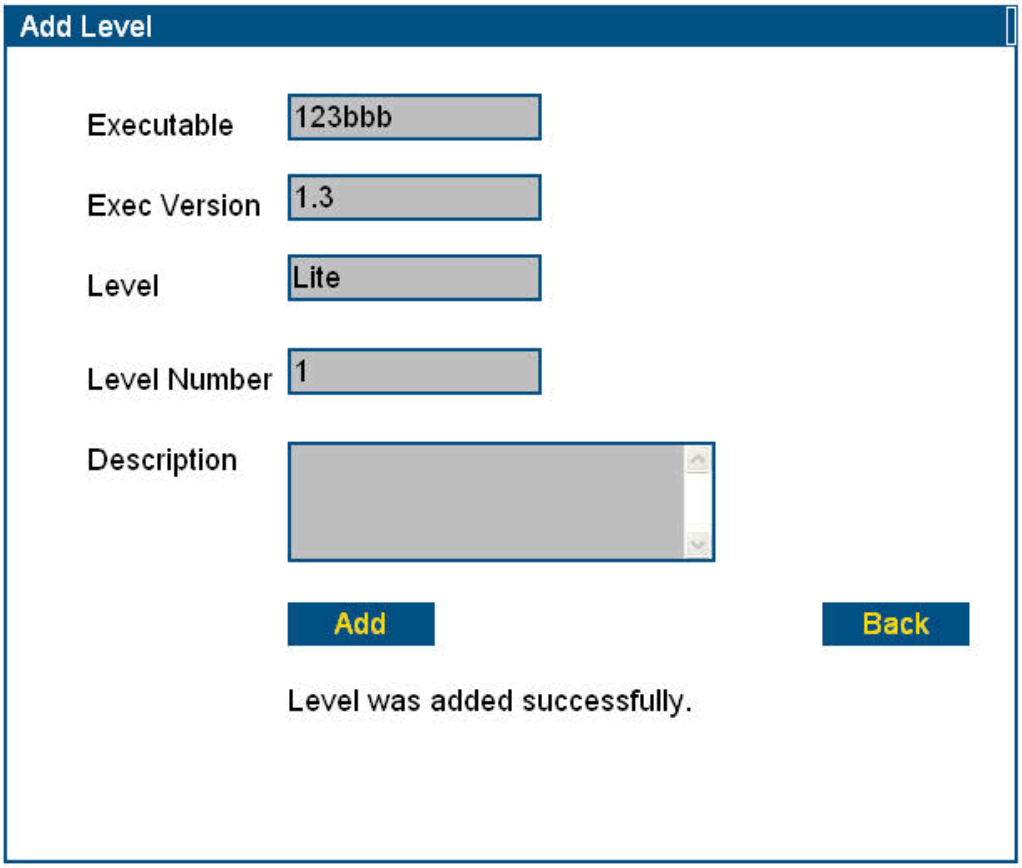


Figure 3-27 Level added message

9. A quick way of verifying your additions or changes is to go back to the Product Browser screen and **Choose** the new Level. Check that your new Level is listed in the list of results.

Procedure – Add Options

Note: A maximum of 32 bits available for options and levels combined [per product] is allowed.

1. Go to the Product Browser screen. Note the Options section in the bottom part of the screen:

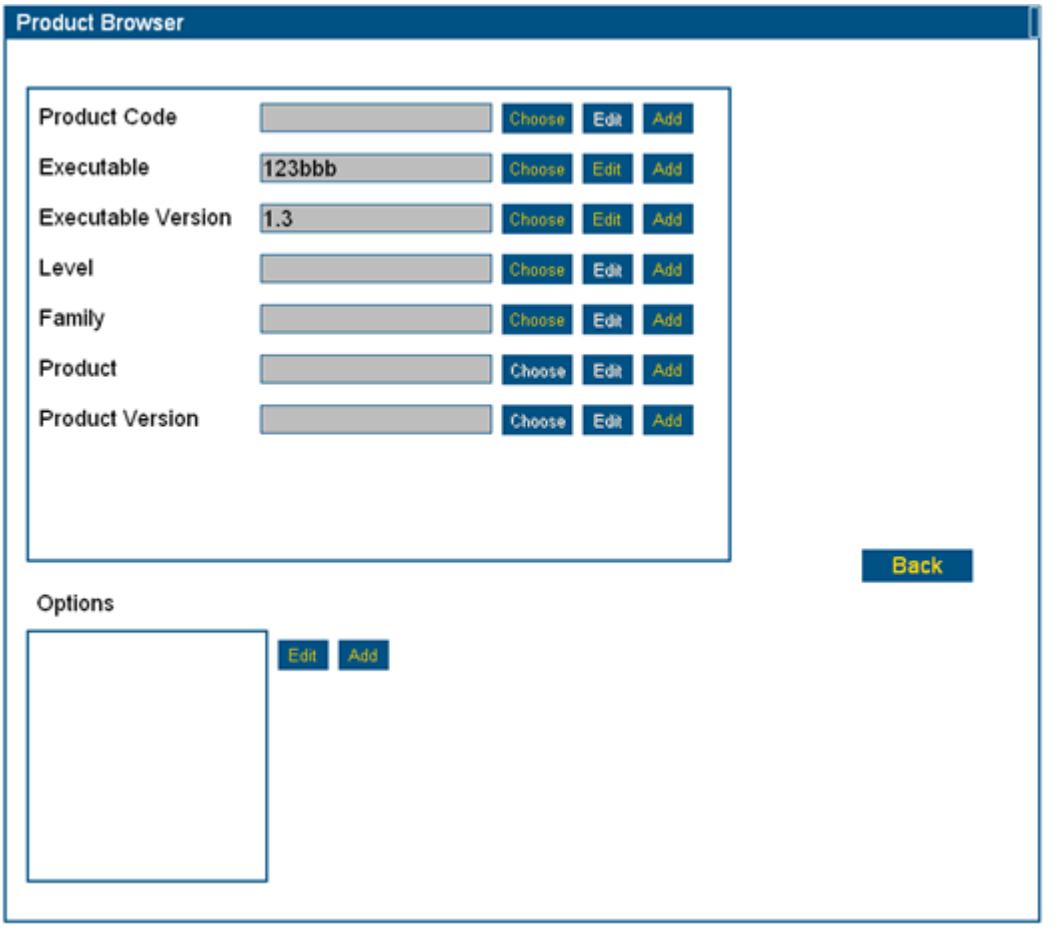


Figure 3-28 Product Browser – Options screen

2. Choose the Executable/Executable Version you want.
3. Any pre-defined Options are listed in the Options box on this screen. You need to define levels and options if your product code will use them. However, options are not mandatory.
4. Click **Add** beside the Options box. The Add Option screen displays:

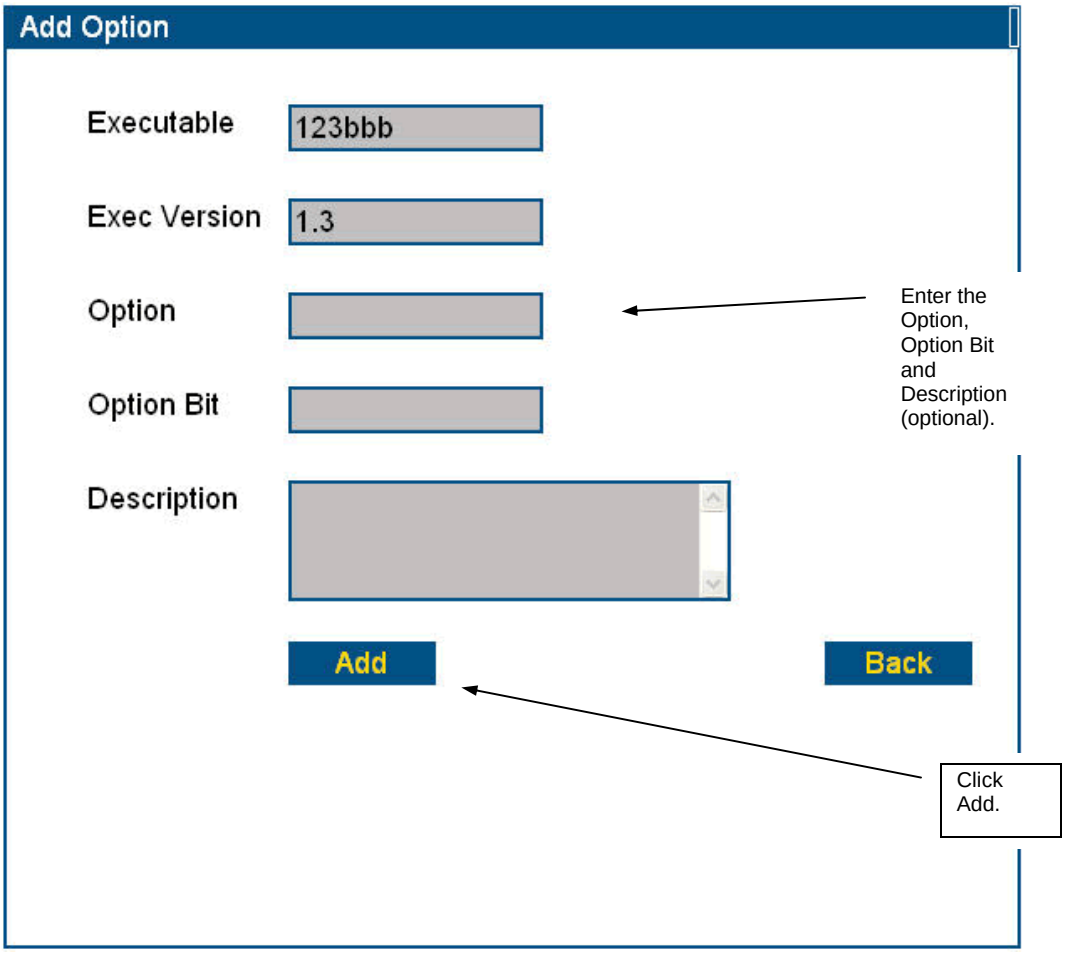


Figure 3-29 Add Option screen

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 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:

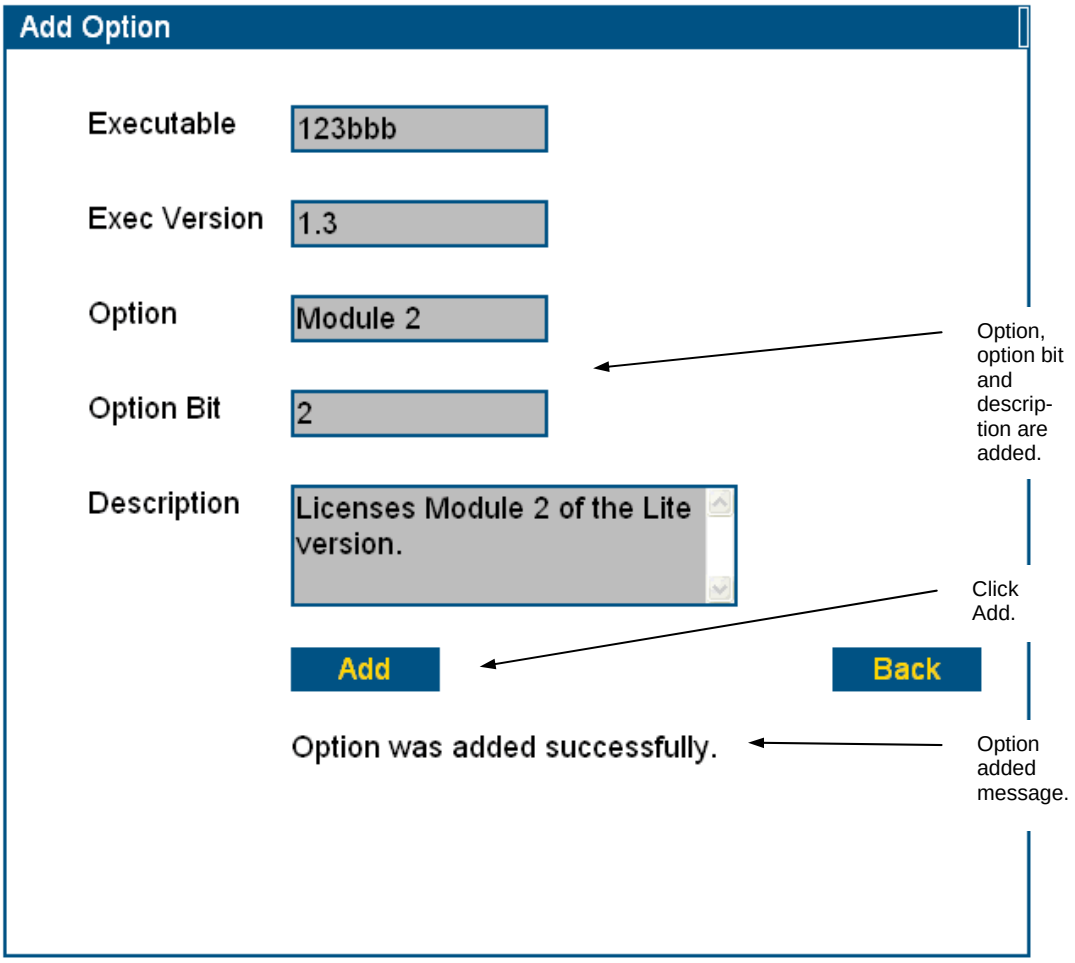


Figure 3-30 Option added message

10. Click the **Back** button to return to the Product Browser screen. The new Option for the Executable and Version will appear in the list of Options:

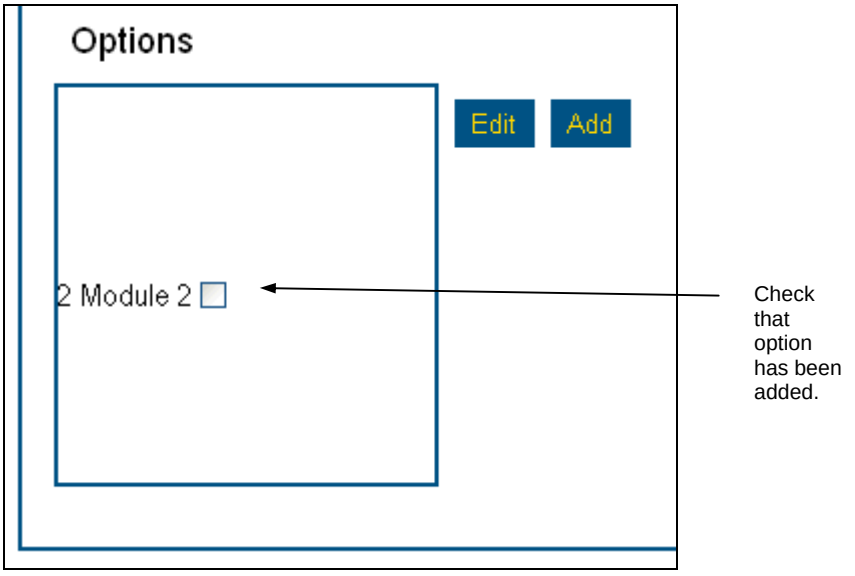


Figure 3-31 Options list

11. If you wish to add another option to this executable version, click the **Add** button. If you wish to edit, click the **Edit** button.

Note: Options are not turned on from this screen. Specify which options will be enabled when you create the associated Product Code. (See *Add Product Codes* on page 114.)

ADD PRODUCT CODES

You may add Product Codes using either the Product 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/executable, you must enter the rest of the Product Codes using Product Browser. You can also modify licensing information using the Product 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 License restrictions, Level and Options (if defined). This information must already be input into the system before a Product Code can be created, or

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, and associate them with a Product Code. (Casper creates the rest of the required information by default.)

Procedure – Add Product Codes using the Setup Wizard

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

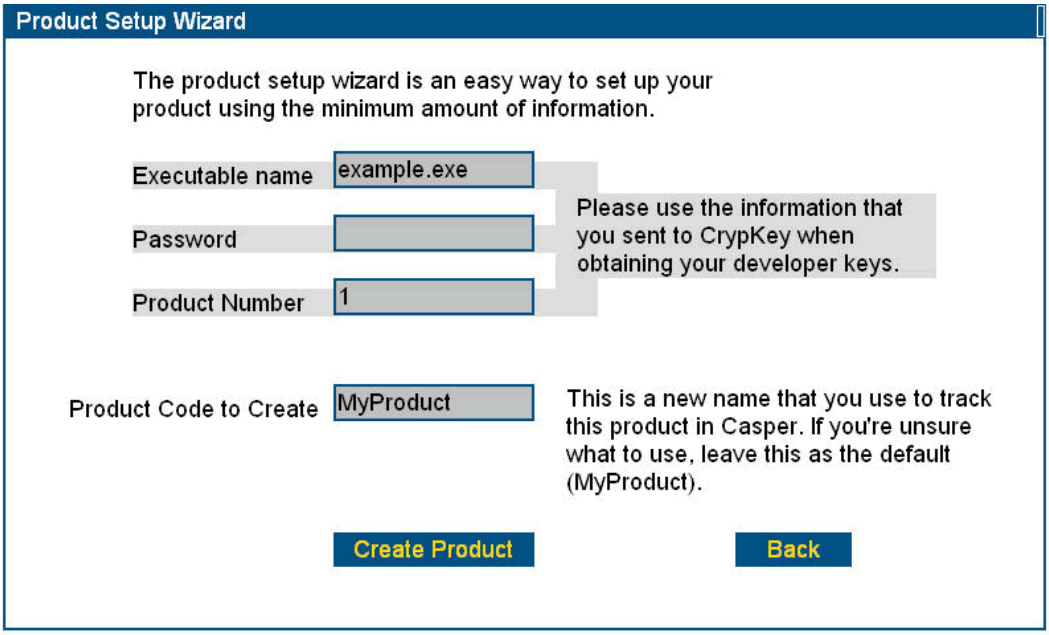


Figure 3-32 Setup Wizard screen – defaults

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 restrictions, Product Version, Executable Name, Executable Version, Level (optional), and Options (optional) via the Product 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.

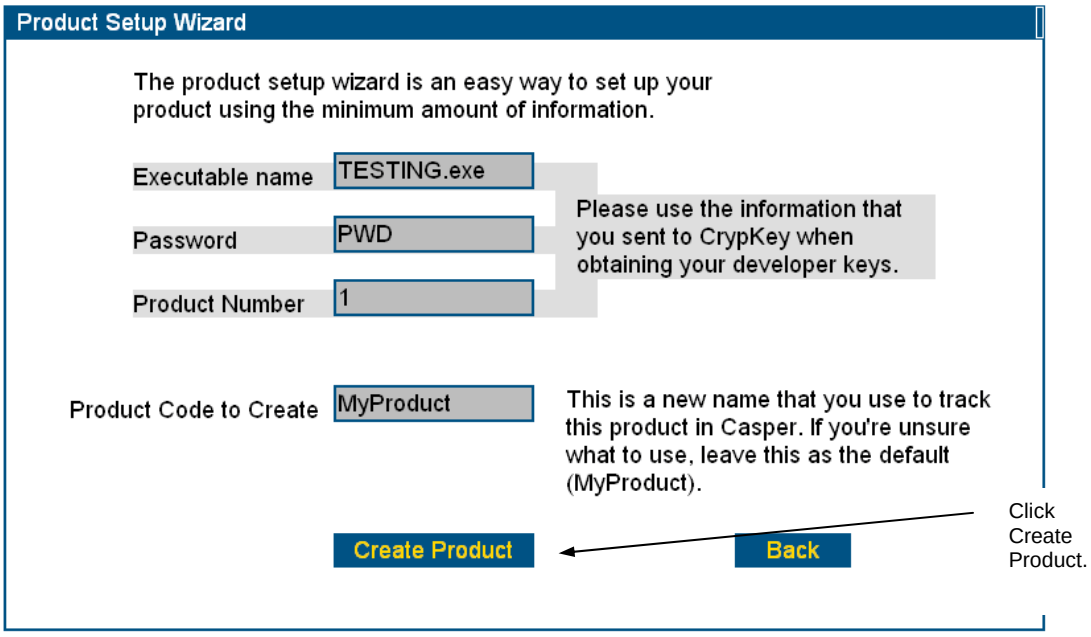


Figure 3-33 Add Product Code using Product Setup Wizard

6. Click **Create Product**. You will see the following message:

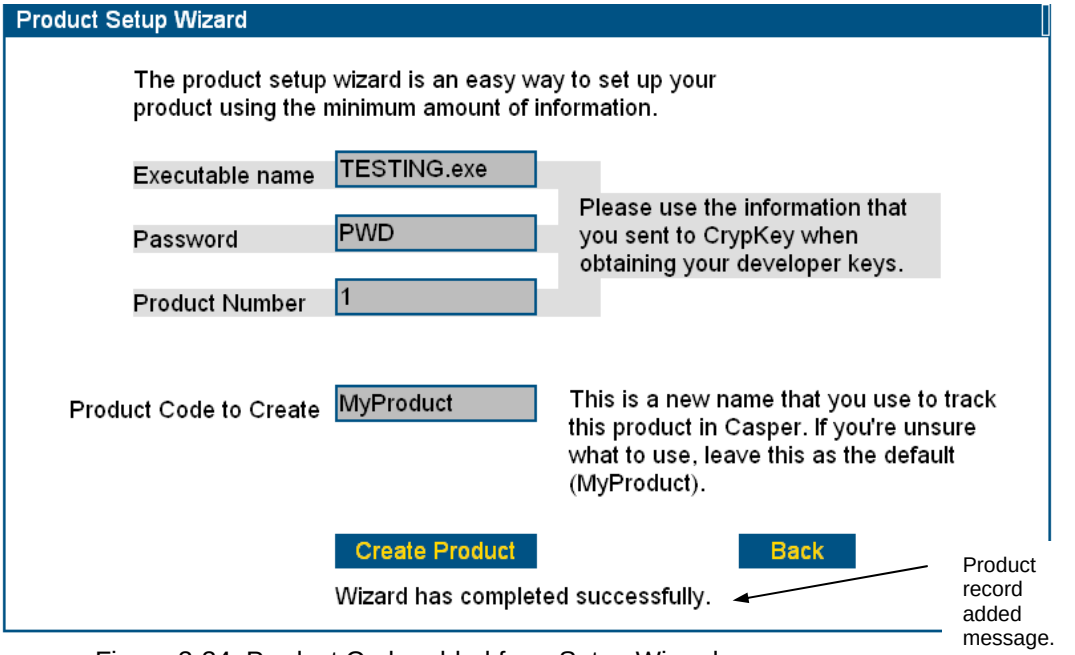


Figure 3-34 Product Code added from Setup Wizard

7. You have now associated a Product Code ("MyProduct") with an executable ("TESTING.exe". Alternatively, you can complete this step using the Product Browser (see the following section).
8. The Product Code is automatically associated with a Family, Product, and Product Version (see *Product Browser* on page 120).when you add it using the Setup Wizrd. If you use the longer manual method, you can specify this association.
9. To verify your newly added Product Code, go to the Product Browser screen and click **Choose** beside the Produce Code box. Select the new Product Code. The Product Code will be displayed on the Product Browser screen.

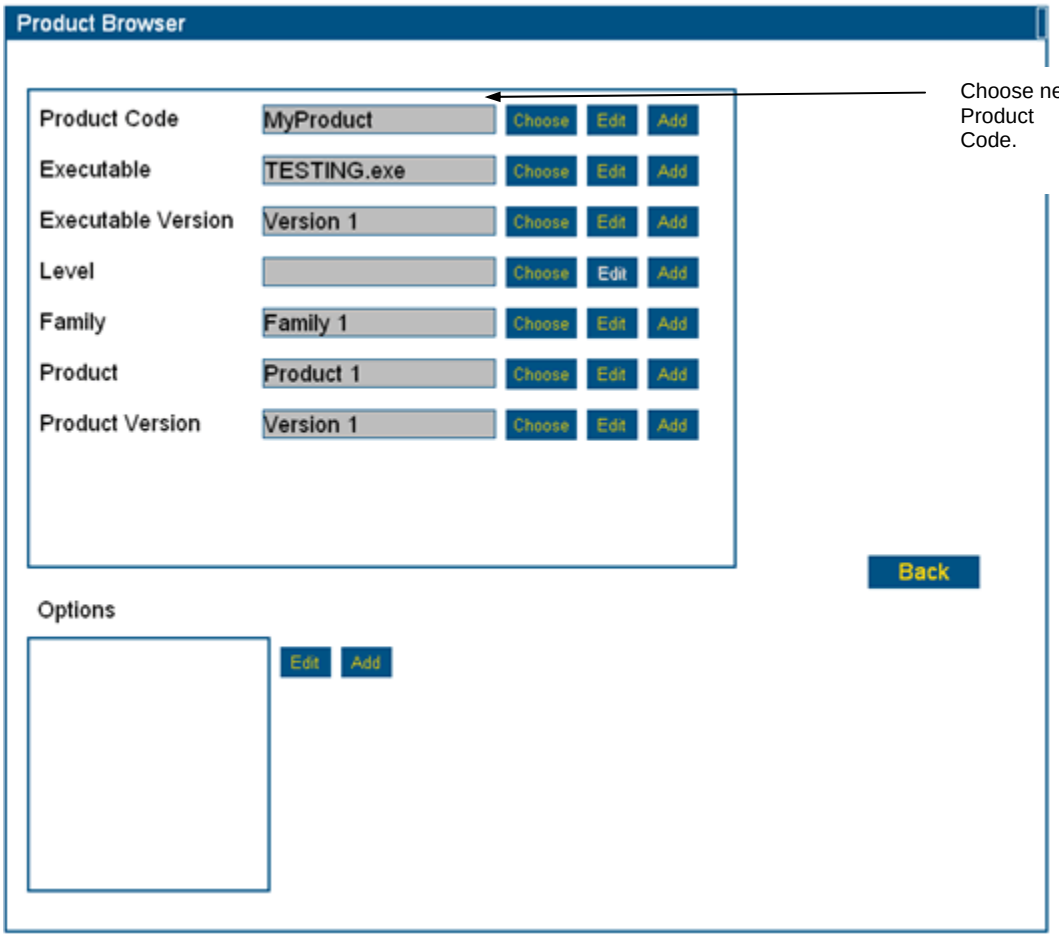


Figure 3-35 New Product Code is displayed on Product Browser screen

Note: When you add a customer (see *Add Customer Information* on page 133) 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 BROWSER

Procedure – Add Product Codes using the Product Browser

Note: Before you can create a Product Code using the Browser, you must set up the associated information: Executable, Executable Version, Level, Family, Product, Product Version, and License restrictions. See the applicable sections in this manual for more information.

Note: You can create a basic Product Code quickly using the Setup Wizard. See *Product Setup Wizard* on page 115.

1. Open the CasperWeb Main menu.
2. Under the Product menu, click **Product Browser**. The Product Browser screen displays:

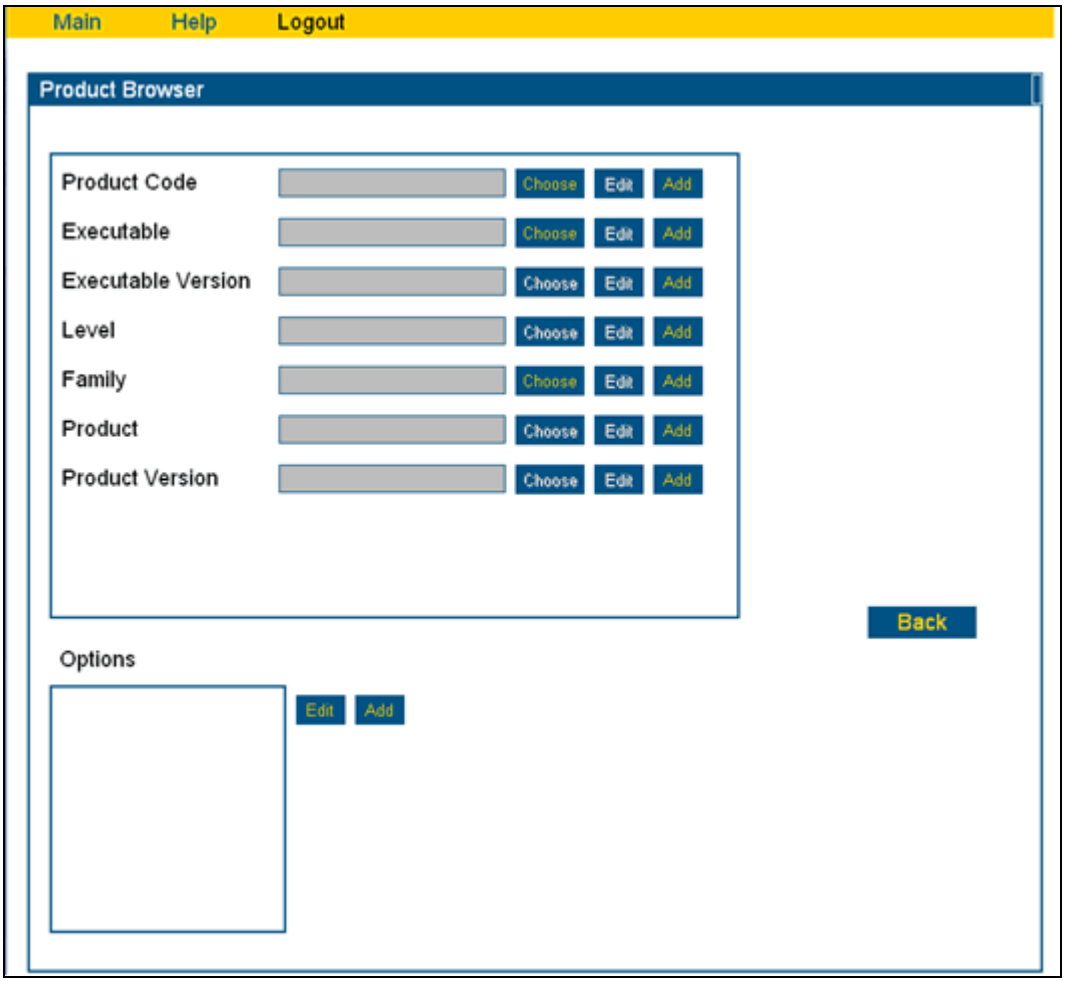


Figure 3-36 Product Browser screen

3. Click on **Add** beside Product Code. Casper displays the Product Code Add screen:

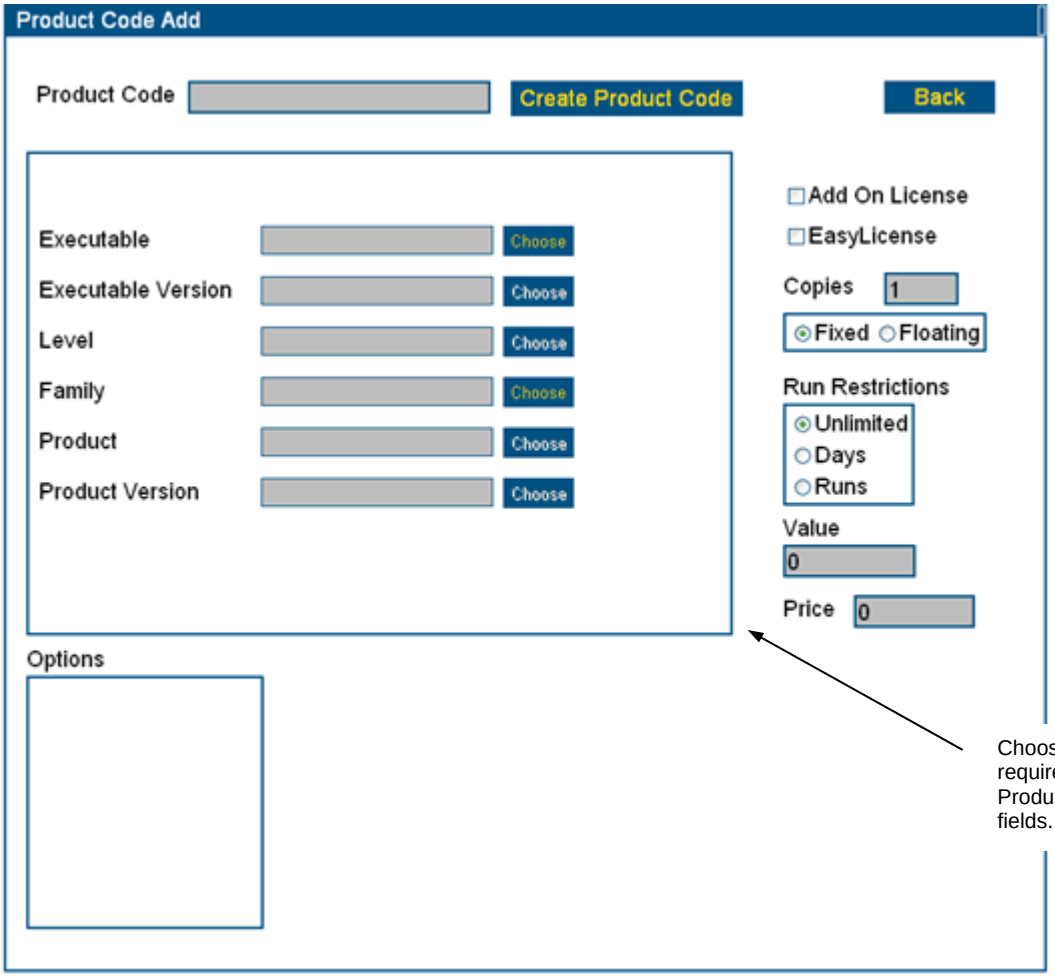


Figure 3-37 Product Code Add screen

4. Enter an alphanumeric Product Code in the text box.
5. Fill in the required fields using the **Choose** option:
    - Executable
    - Executable Version (Note: If any options were previously defined for the chosen version, they will be displayed in the Options list at the bottom of the screen)
    - Family
    - Product
    - Product Version

Note: These fields must have been created previously from the Product Browser screen. If you don't **Choose** an item for each of the required fields, you will receive a message similar to the following. See the previous sections for details on filling in these fields.

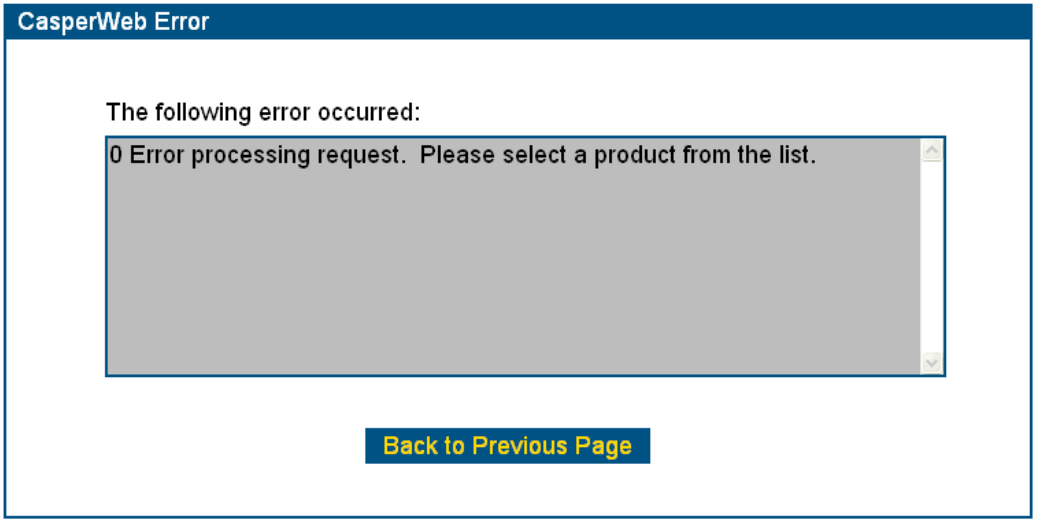


Figure 3-38 Product Code Add error message

6. **Options:** If any options were defined for a particular version of an executable (see the *Add Options and levels* section), they will be displayed in the Options area. If you wish to enable an option, check the box next to it.
7. **Add On License** is defined in the Add Customer Information screen (see *Add Customer Information* on page 133).
8. **EasyLicense** is used to apply an unlimited license (no restrictions) to a particular computer. **This will override any other license restrictions for that product**. In order to use EasyLicense, Casper must be able to read an HDSN (hard drive serial number) for the computer (contained in the Site Code). The Customer History screen below shows a sample. EasyLicense is not a license 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.

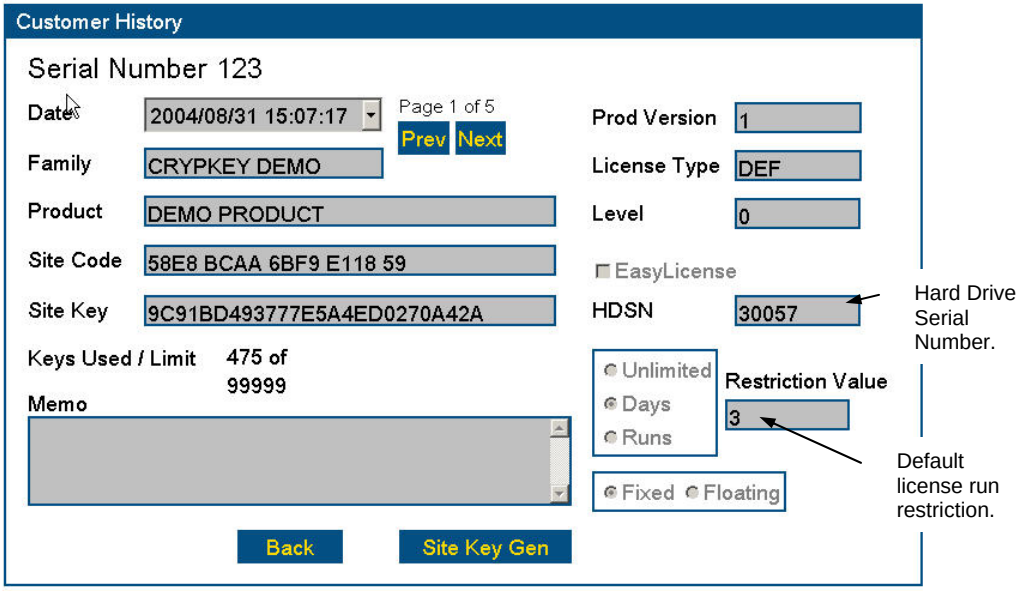


Figure 3-39 Customer History showing HDSN

9. **Copies**: The number of copies of the software that you would like the customer to be issued access to with one authorization.
10. **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 and floating can be issued more than one copy.
11. **Run Restrictions:** Radio buttons indicating whether the license can be run indefinitely (unlimited) or for a specified number of days or runs (see **Value**, below).
12. **Value**: Number denoting days or runs, as selected in **Run Restrictions**.
13. **Price:** This is a required field but 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* in this manual).
14. Click **Create Product Code**. You will see a message similar to the following:

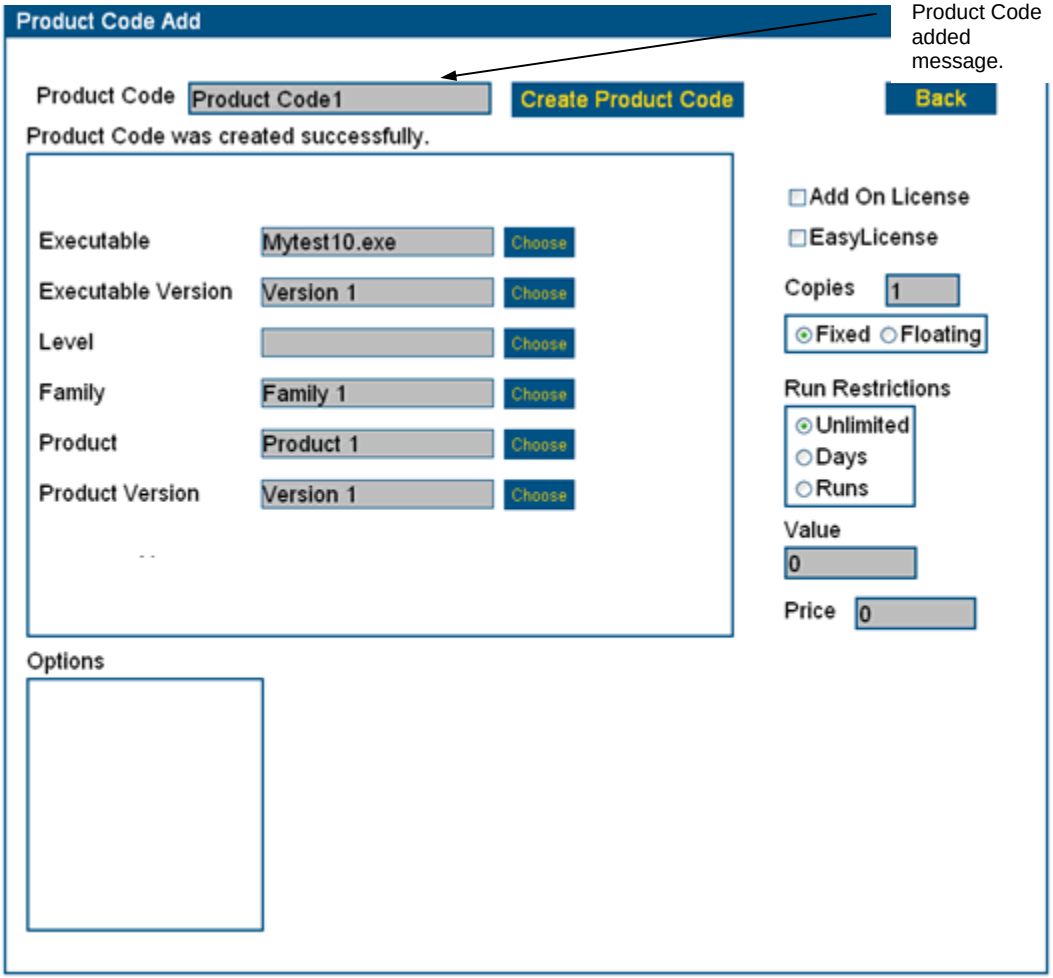


Figure 3-40 Product Code added message

Procedure – Browse Product Codes

1. To browse Product Codes, go to the CasperWeb Main menu/Product menu and click on the Product Browser link. The Product Browser screen displays.
2. To view details of any of the listed Product Codes, click on the **Choose** button. The Choose Product Code screen displays with a list of existing Product Codes:

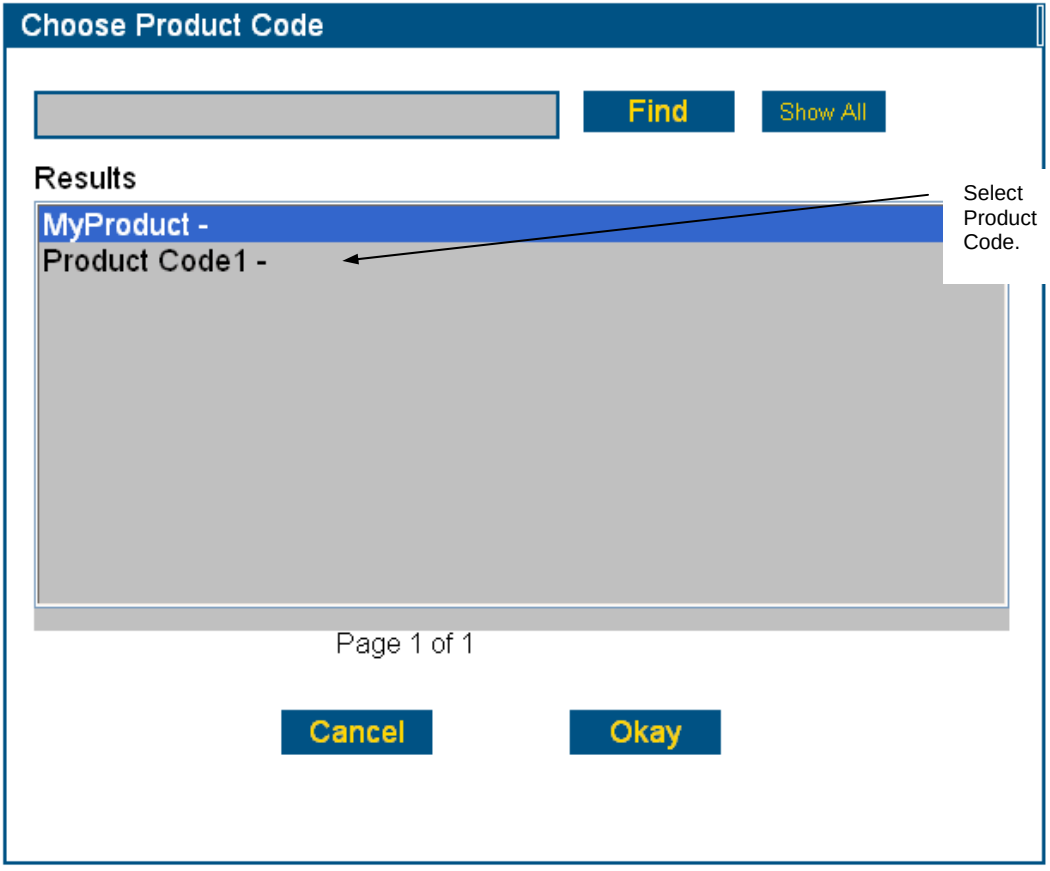


Figure 3-41 Choose Product Code screen

3. Find the Product Code and click to highlight. You will be returned to the Product Browser with the selected Product Code filled in. Note the other fields related to this Product Code are also populated:

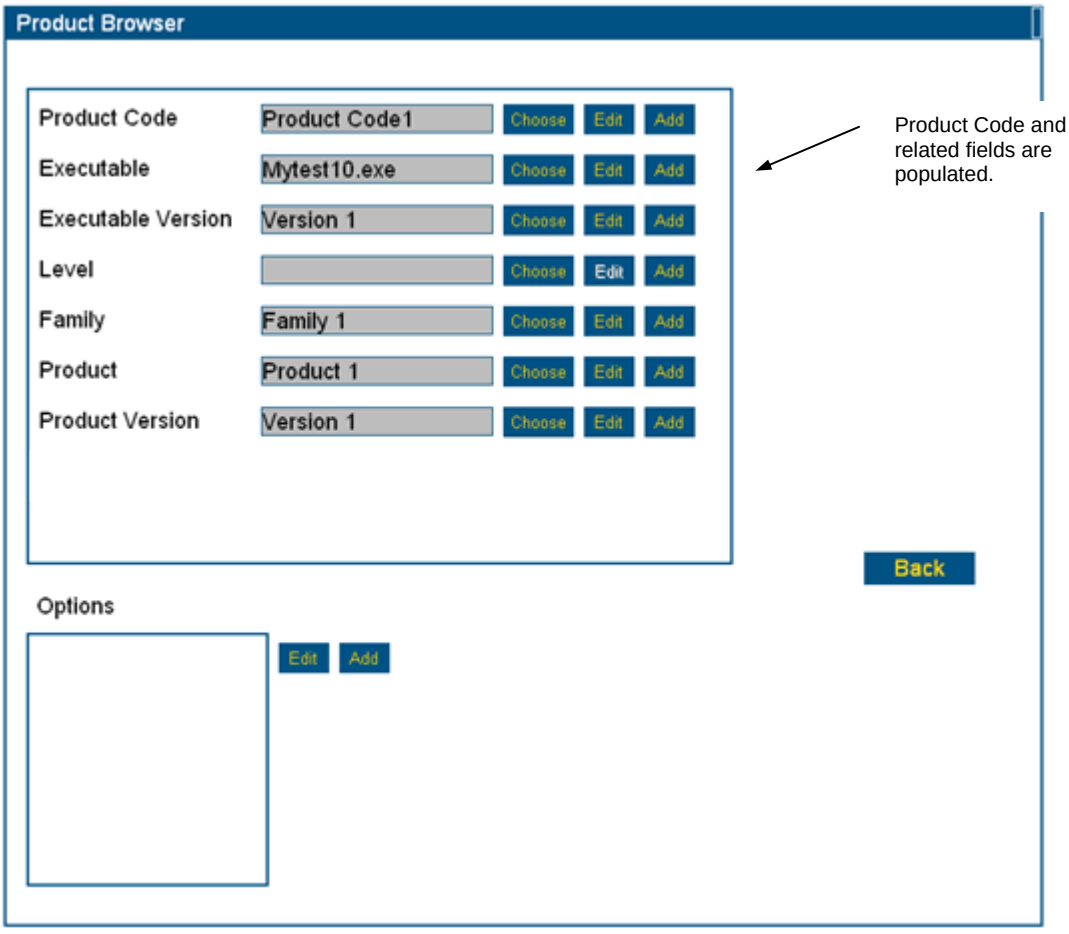


Figure 3-42 Product Browser with selected Product Code

Procedure – Modify Product Codes

You can modify a product's license details as needed. However, remember that the Product Code may be associated with more than one customer Serial Number.

The following figure shows the sample Product Code 'ProductCode1' with a modification (in this example, number of copies has been changed from Fixed to Floating type, and the number increased).

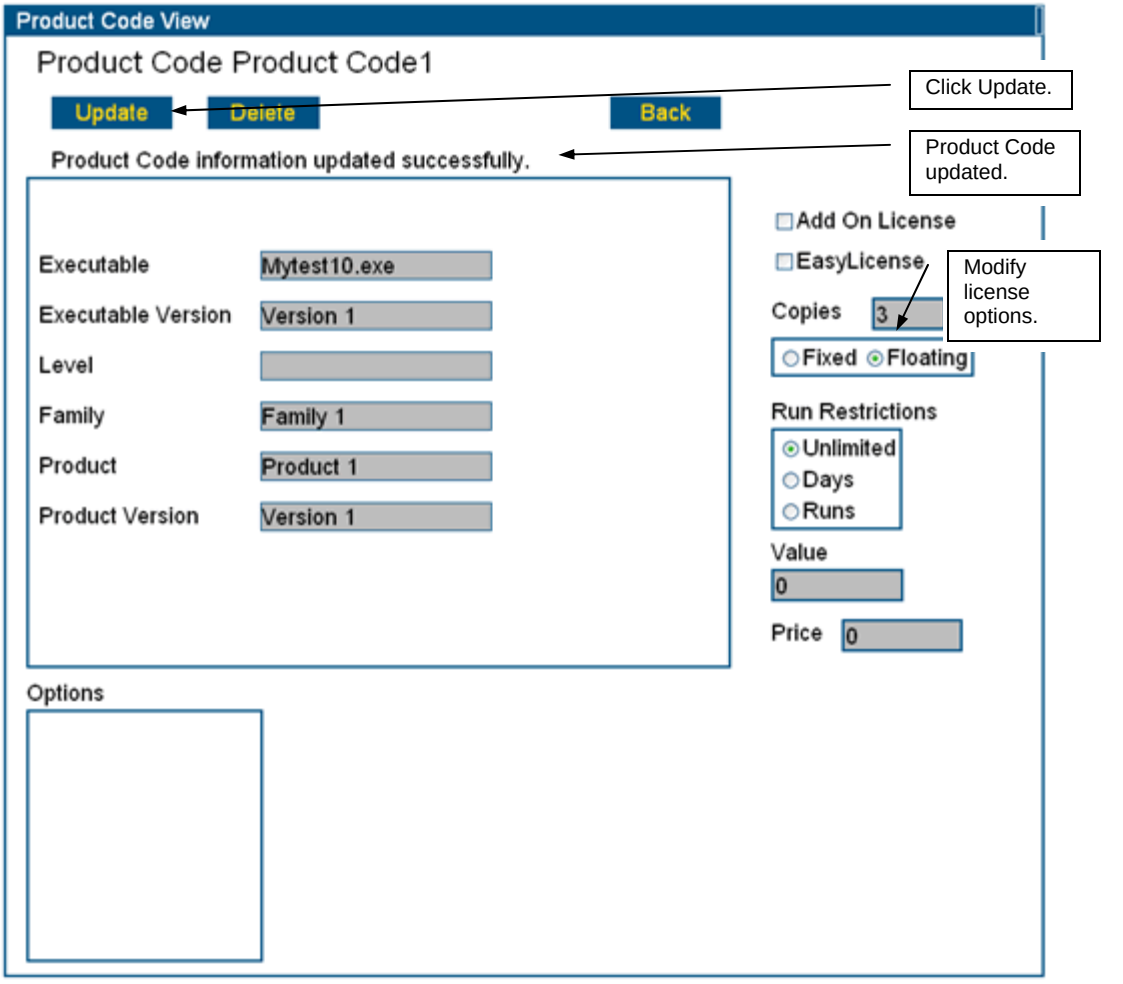


Figure 3-43 Product Code – modify details

Procedure – Delete Product Codes

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

1. To delete a Product Code, go to the CasperWeb Main menu/Product menu and click the link for Product Browser. The Product Browser screen displays.
2. Click **Choose** to select a particular Product Code from the existing list. If the list extends past a single page, use the **Next** or **Prev** buttons to view multiple pages. Or, enter text in the text box and click **Find**.

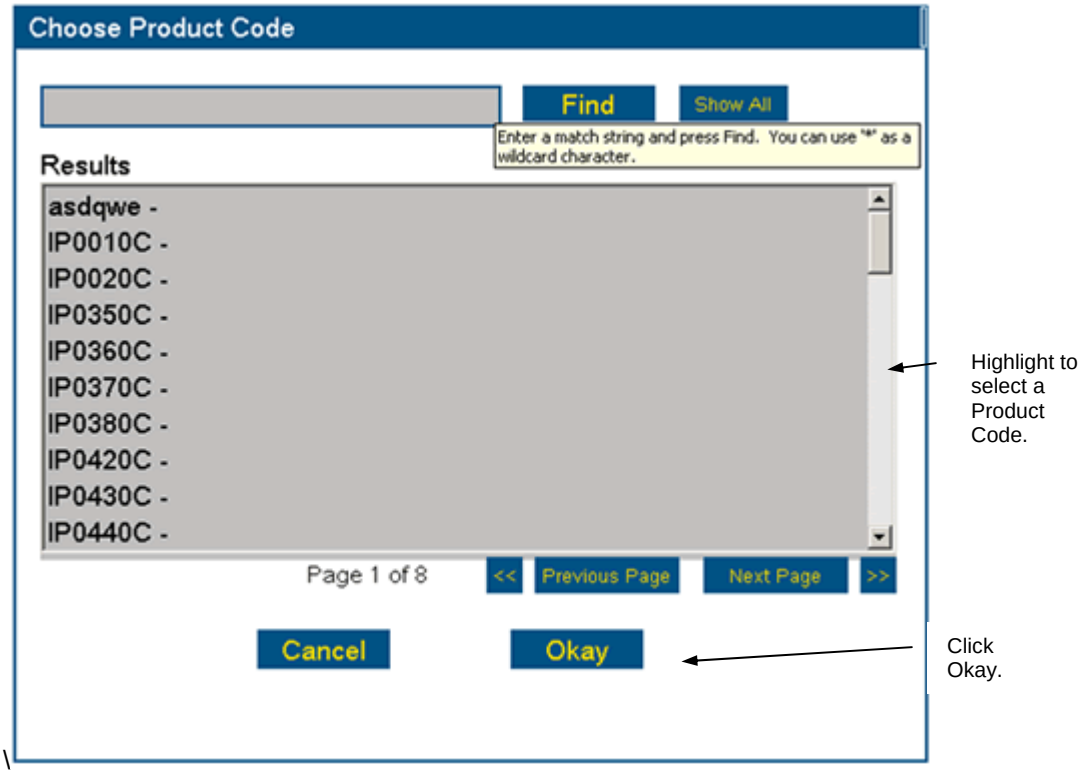


Figure 3-44 Select Product Code to delete

3. Click on a Product Code to highlight it.
4. Click **Okay**. CasperWeb returns you to the Product Browser screen. The Product Code box will be filled in with the Product Code you selected.
5. Now, click **Edit** beside the Product Code box. The Edit Product Code screen displays:

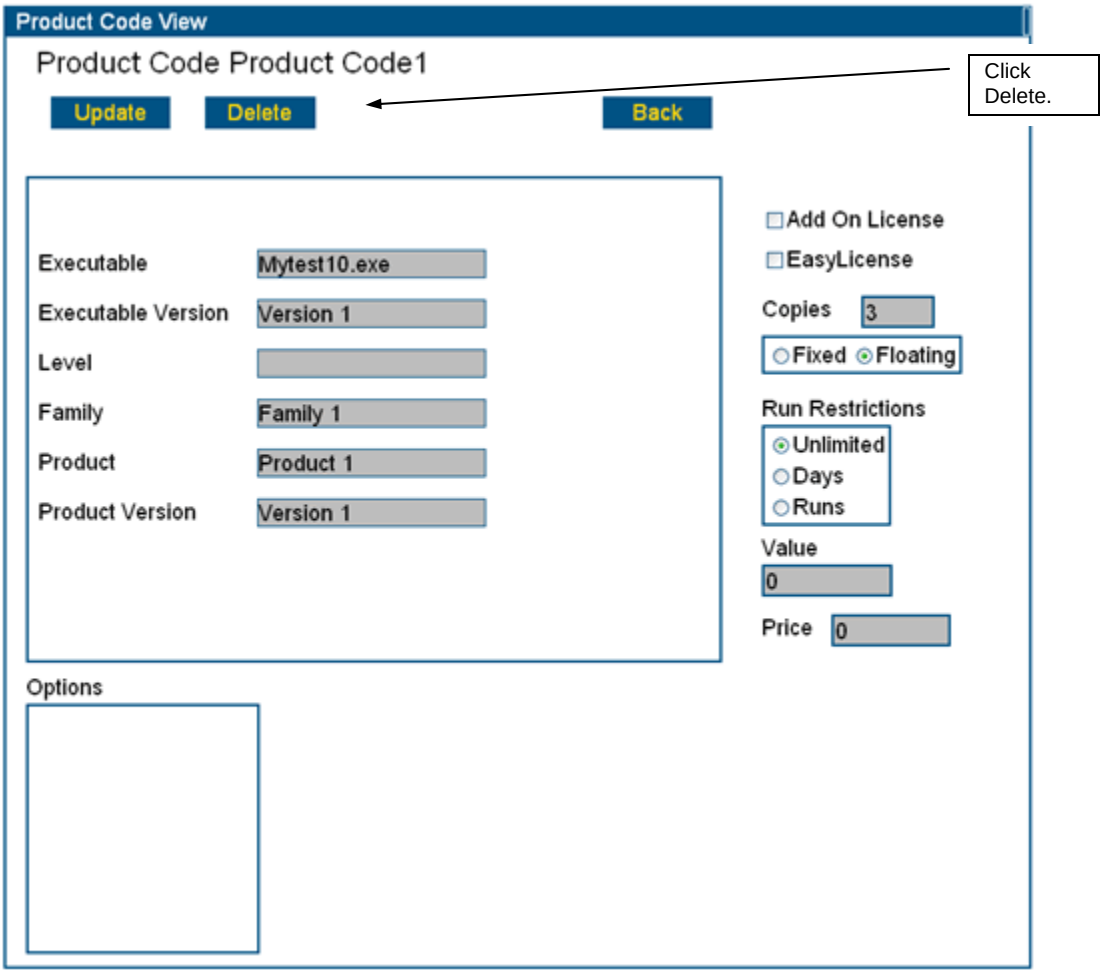


Figure 3-45 Edit Product Code

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

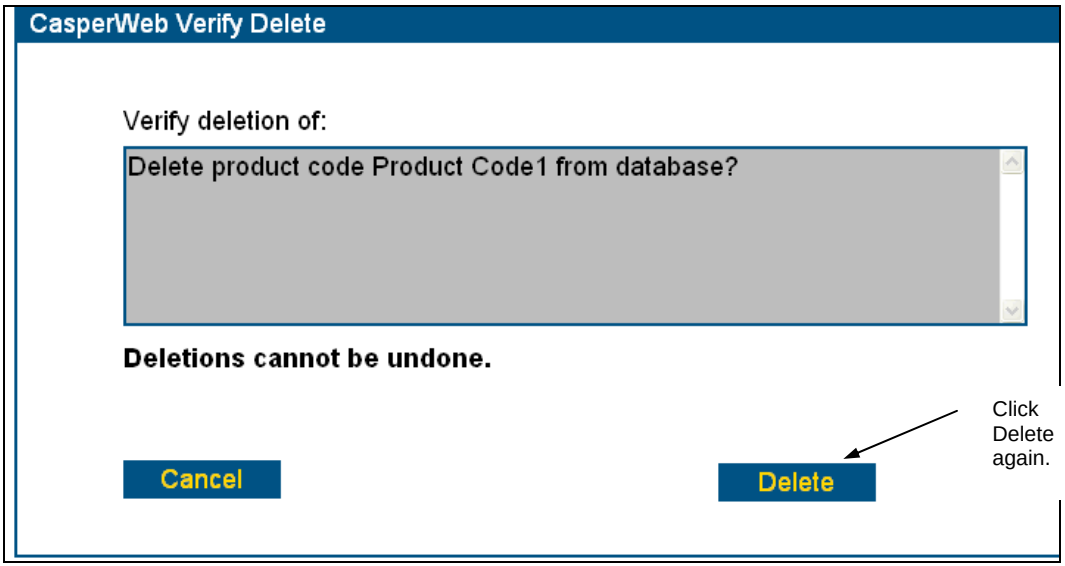


Figure 3-46 Verify Product Code deletion

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

   Note: Deletions cannot be undone.

8. Click **Back** to return to the Product Browser screen. The Product Browser screen will be cleared of the deleted Product Code.

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 CasperWeb Main menu/Product 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 has to be 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 147). 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 Electronic Purchase Wizard to transmit the request (including the Site Code), your Casper Server should automatically generate and send the Site Key back to the customer.

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 using the Edit Customer Info option, or it can be left blank for the customer to enter at the license authorization stage.

Add Customer Information

Use this function as a way to add new customers to the database.

Note: You can also add customers to the database using the import function. (See *Auto Import* on page 174.)

Procedure

1. From the CasperWeb Main menu/Customer Info menu, click on Add New Customer. CasperWeb displays the Add Customer Information screen:

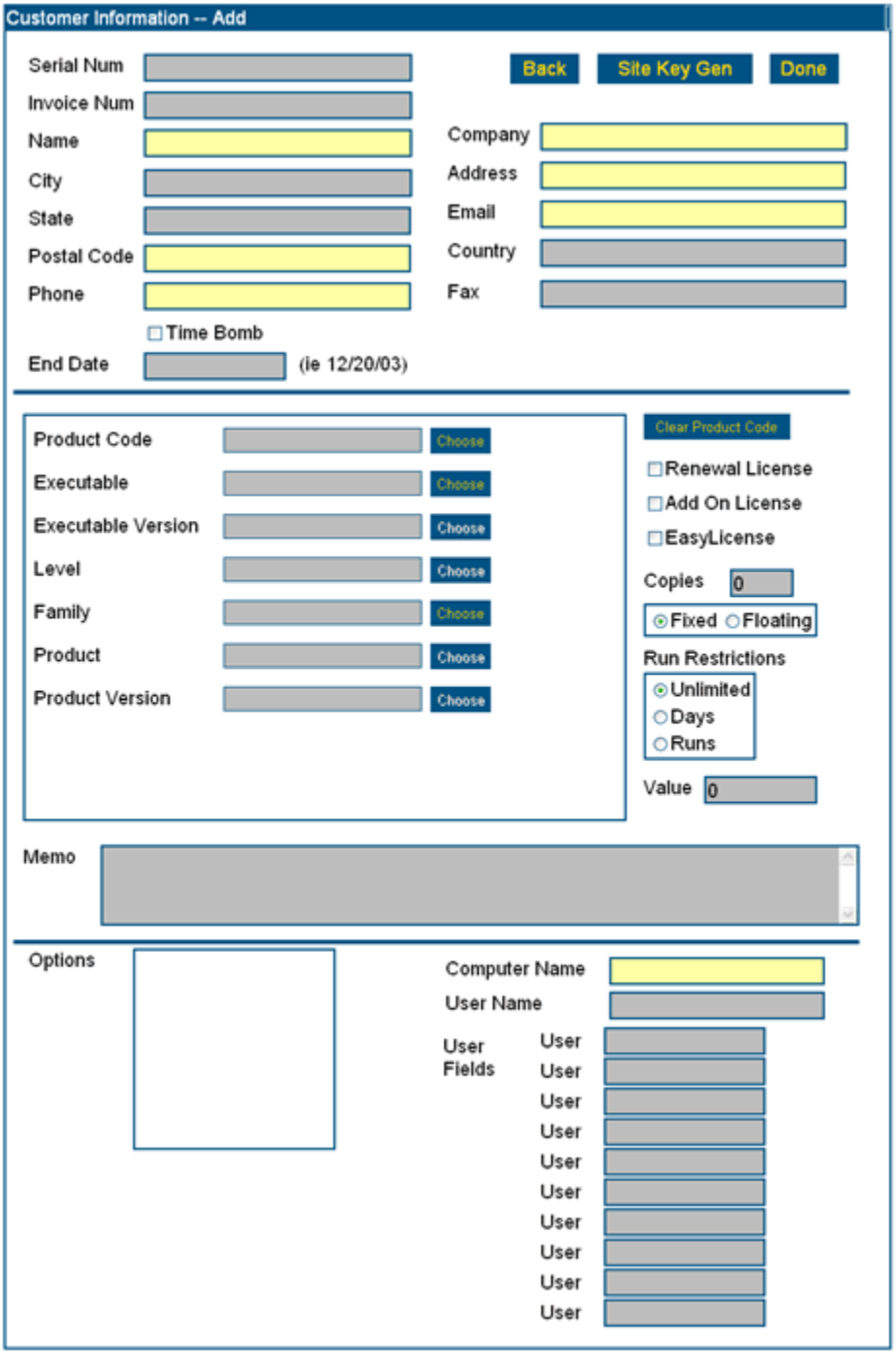


Figure 4-1 Add Customer screen

2. Scroll down to see the entire contents of the window.
3. Enter the data/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 174).

Table 4-1: Customer Information—Data Entry Fields

Field Name	Description
Top portion of window -- Customer Information section:	
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.

Field Name	Description
Company	Customer's company name.
Address	Customer's company address.
Email	Customer's email address.
Country	Country in which the customer resides.
Fax	Customer's corporate fax number.
Middle portion of window – Product section	
Product Code	Product code (created in the previous section) for this specific serial number. The code references a set of associations among Family, Product Name, Product Version, Executable Name, Executable Version, Level (optional), and Options (optional).
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 name of the Executable and executable file name the same.
Executable Version	Version of the executable
Level	A number that controls a set of features of your product.
Family	The Product's category or family.
Product	The name of the Product (e.g. eCommerce).
Product Version	Version of the product

Field Name	Description
CyrpKey Licensing Information section:	
Renewal License	Checkbox indicating whether the current transaction will renew the customer's existing license until the specified expiry date.
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 through the Product Code Add screen.
Copies	The number of copies of the software that you would like the customer to be issued access to with one authorization.
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.
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 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

Field Name	Description
	selected in Run Restrictions.
Memo	Any notes that you would like to add for this specific serial number.
Lower portion of window – Options section	
Options	If Options have been defined for the Product Code, you can select the options for this *specific* 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 User User User etc.	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.

ASSIGNING A CUSTOMER LICENSE

There are three ways you can assign a license to a customer:

1. **License by Product Code**: Select a Product Code with predefined license items. When you enter the Product Code, the rest of the Product fields will be populated automatically.
2. **License by Manual entry**: Select items individually with the **Choose** button.
3. **Clear Product Code**: After selecting a Product Code, click the **Clear Product Code** button to disassociate the Product Code with the Customer/Serial Number.

Then, select Product license items individually (and retain whichever of the defaults you wish). Click **Done** when you are finished to update the Product Code for that customer.

Note: Remember, there may be more than one Serial Number associated with a Product Code. Updates from this screen apply only to that particular Serial Number/customer. The Product Code will retain its defaults for all customers other than the one you've updated.

4. When you are satisfied with the entry, click **Done**.

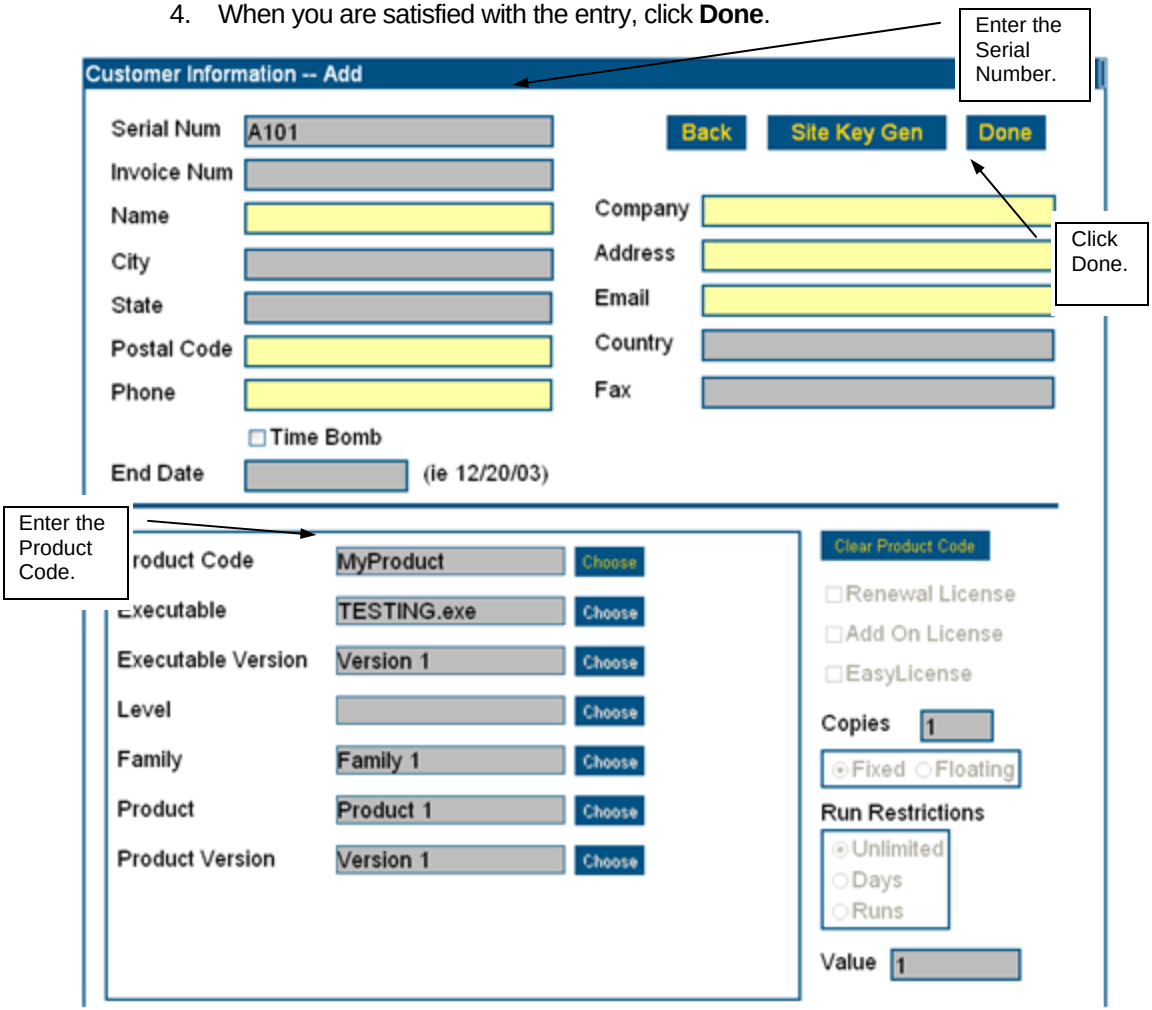


Figure 4-2 Customer added

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

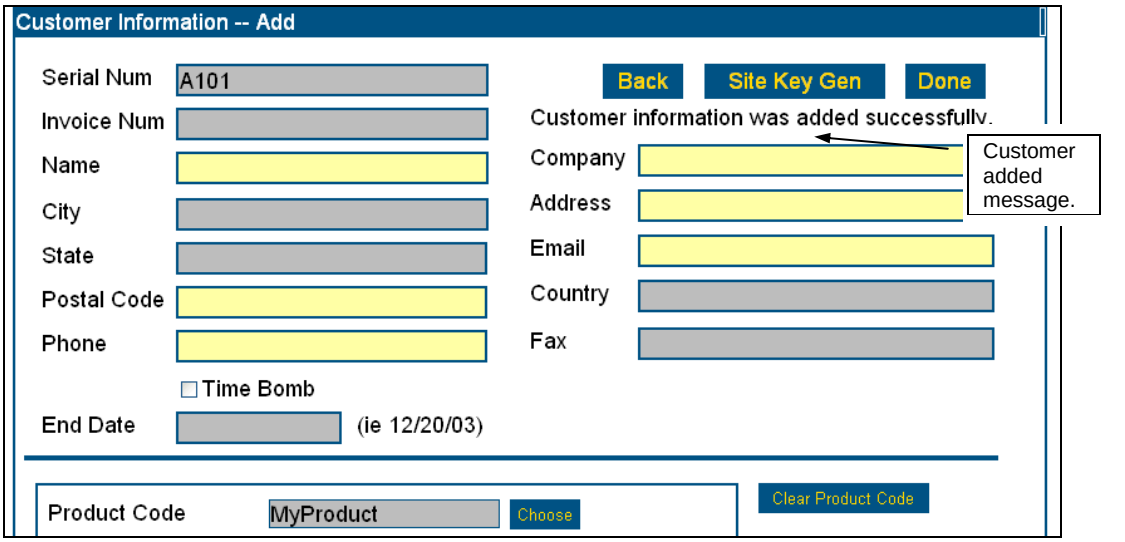


Figure 4-3 Customer added message

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

This function allows you to review and revise customer information: for example, you may want to add more information to the customer record in the example above.

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

Procedure

1. From the CasperWeb Main menu/Product menu, click on Edit Customer Info. CasperWeb displays the Customer Information screen.
2. To search for a customer record, enter the Serial Number, name or invoice number of the customer 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 “456” and click **Serial**, CasperWeb will search for a match strictly based on the Serial Number 456.
- 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 100159.

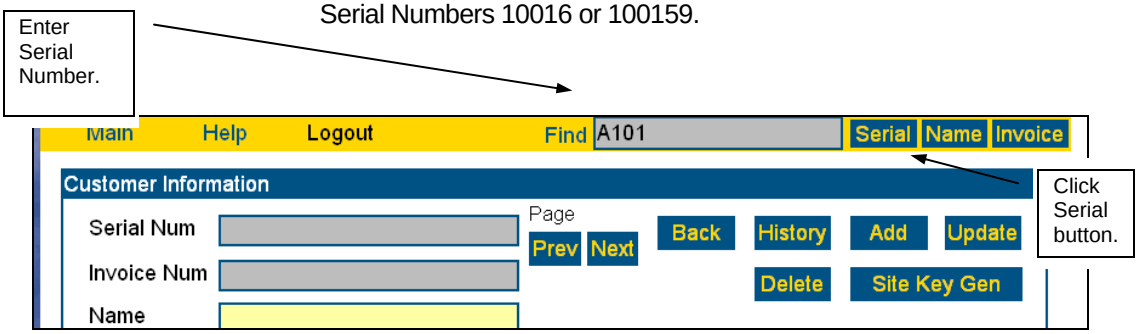


Figure 4-4 Serial Number search

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)**.

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 Serial Number. The Product and Executable fields are not editable.
- 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, use the **Prev** and **Next** buttons to display additional matches.
- The User fields in the lower area of the screen are typically customer inputs from the Casper Electronic Purchase 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.

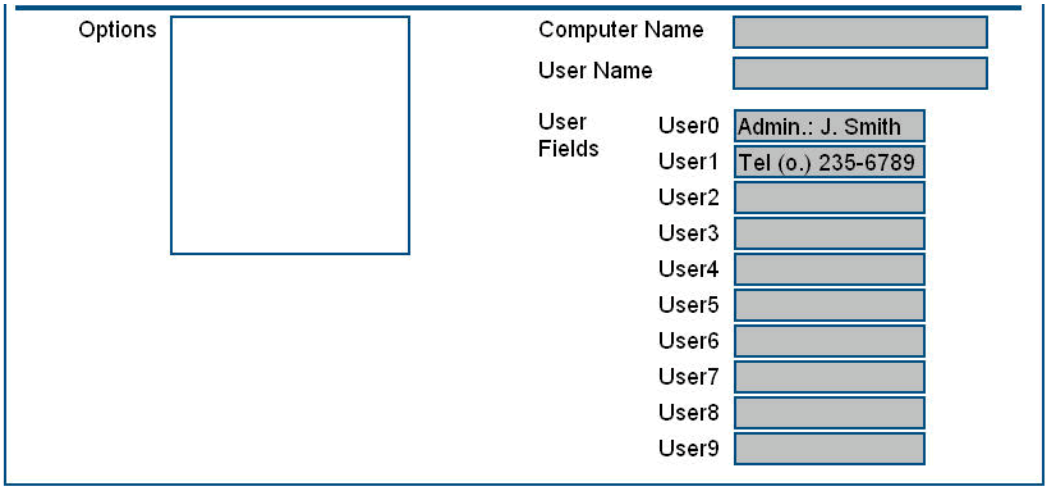


Figure 4-5 Edit Customer screen—User fields

3. 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. Here, the license limit was increased from 1 to 5.

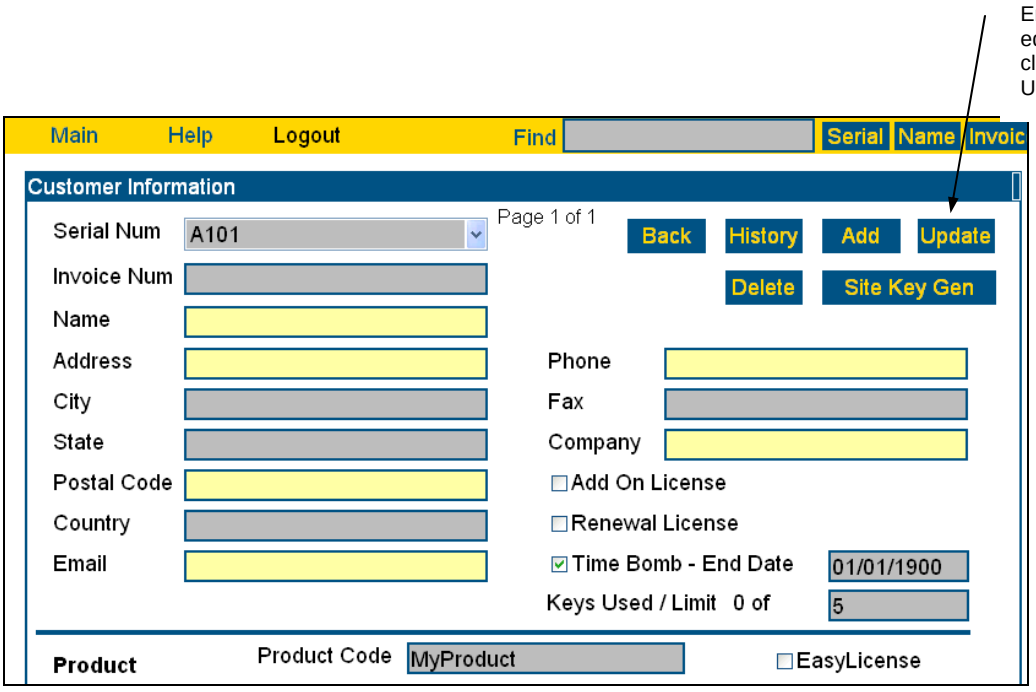


Figure 4-6 Edited Customer Information

Delete Customer Information

Procedure

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

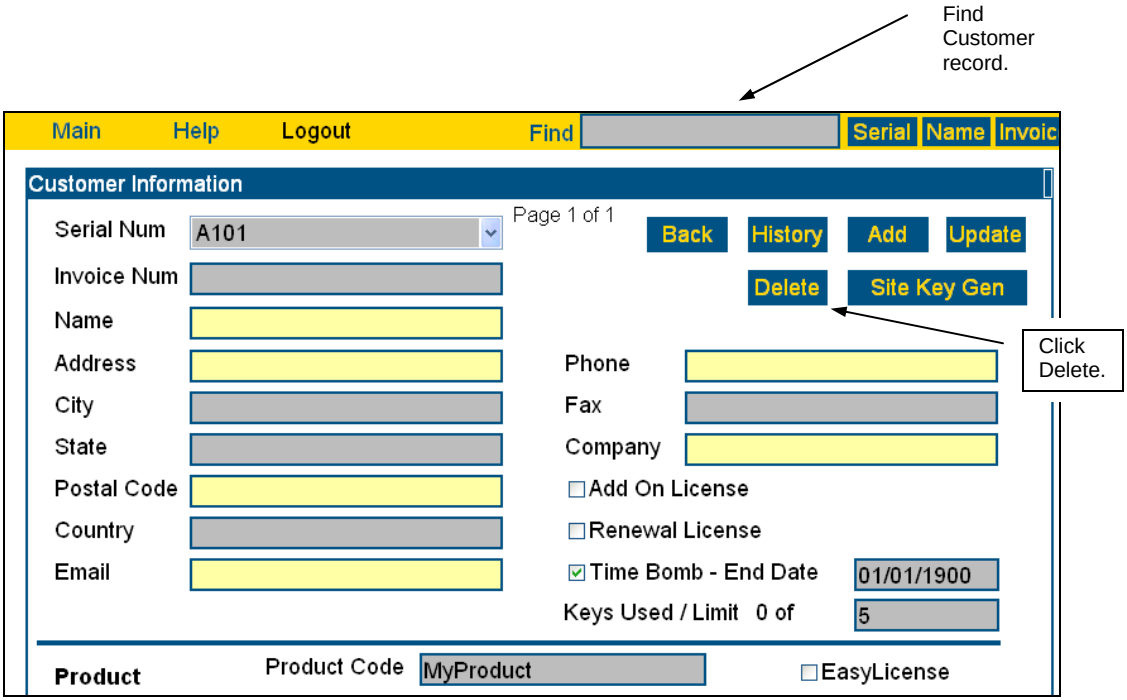


Figure 4-7 Find Customer record to delete

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

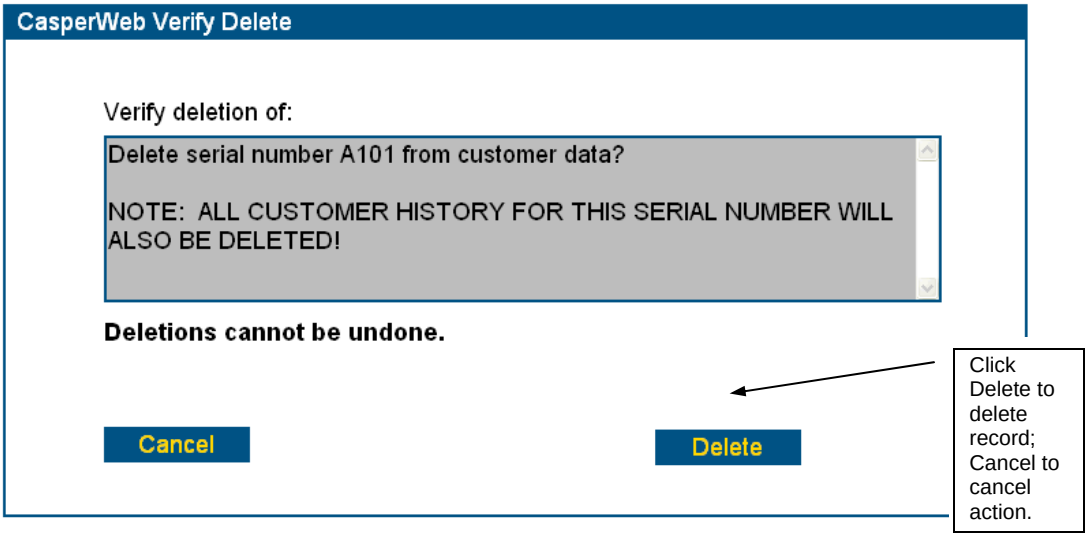


Figure 4-8 Verify Customer record deletion

Note: Deletions cannot be undone. To abort the action, click **Cancel**.

Display Customer History

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

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 CasperWeb Main menu/Customer Info menu, click the Edit Customer Info link. CasperWeb displays the Customer Information 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.

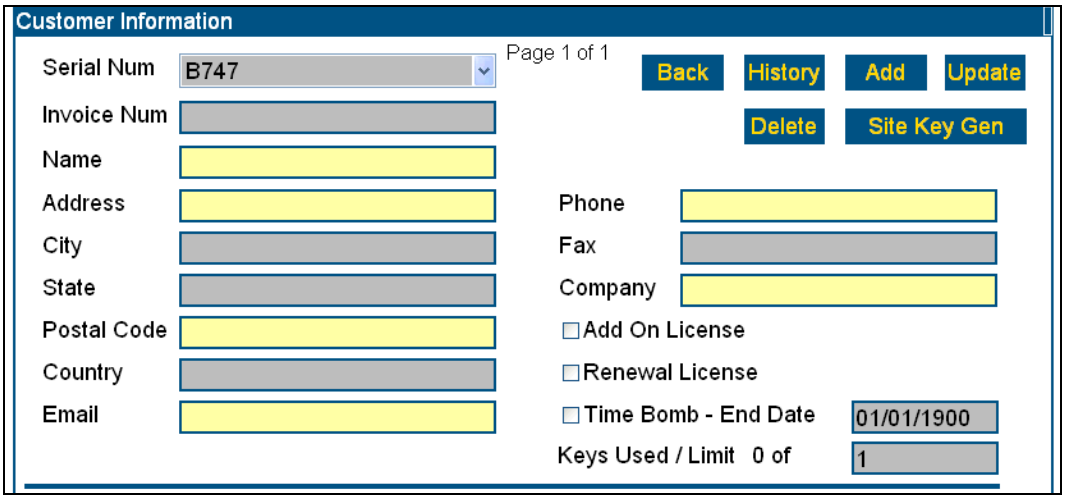


Figure 4-9 Customer Information screen

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

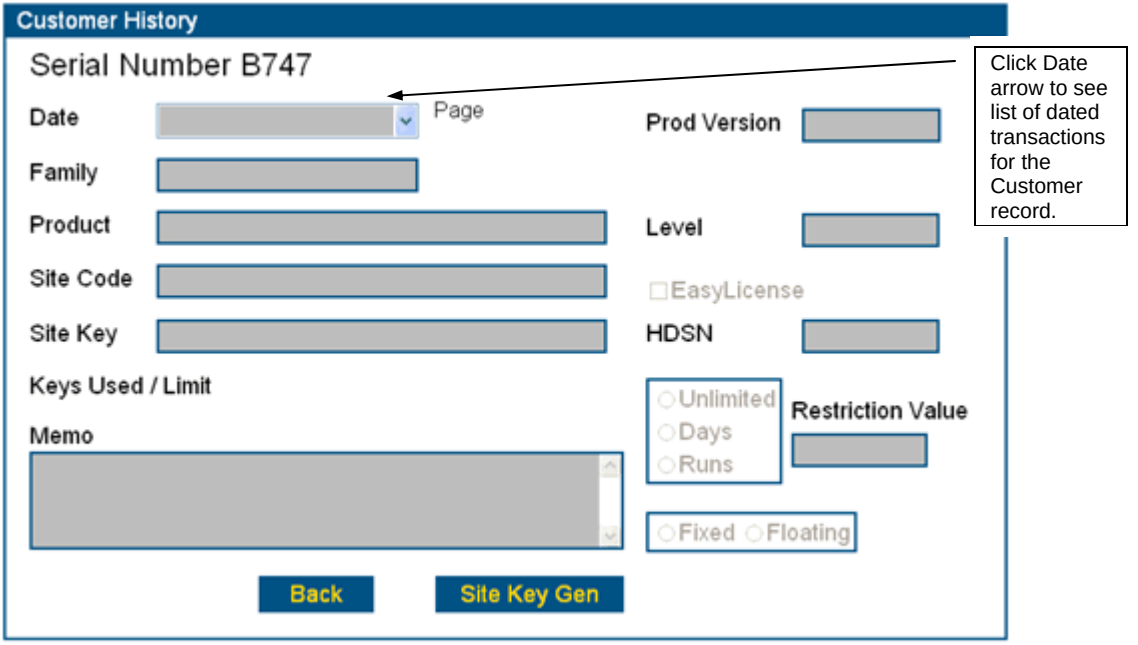


Figure 4-10 Customer History for specified Serial Number

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 once 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 133).
   - display the Edit Customer window for a specific record (see *Edit Customer Information* on page 140).
2. Click the **Site Key Generator** button. CasperWeb will display the Site Key Generator screen for the selected Serial Number:

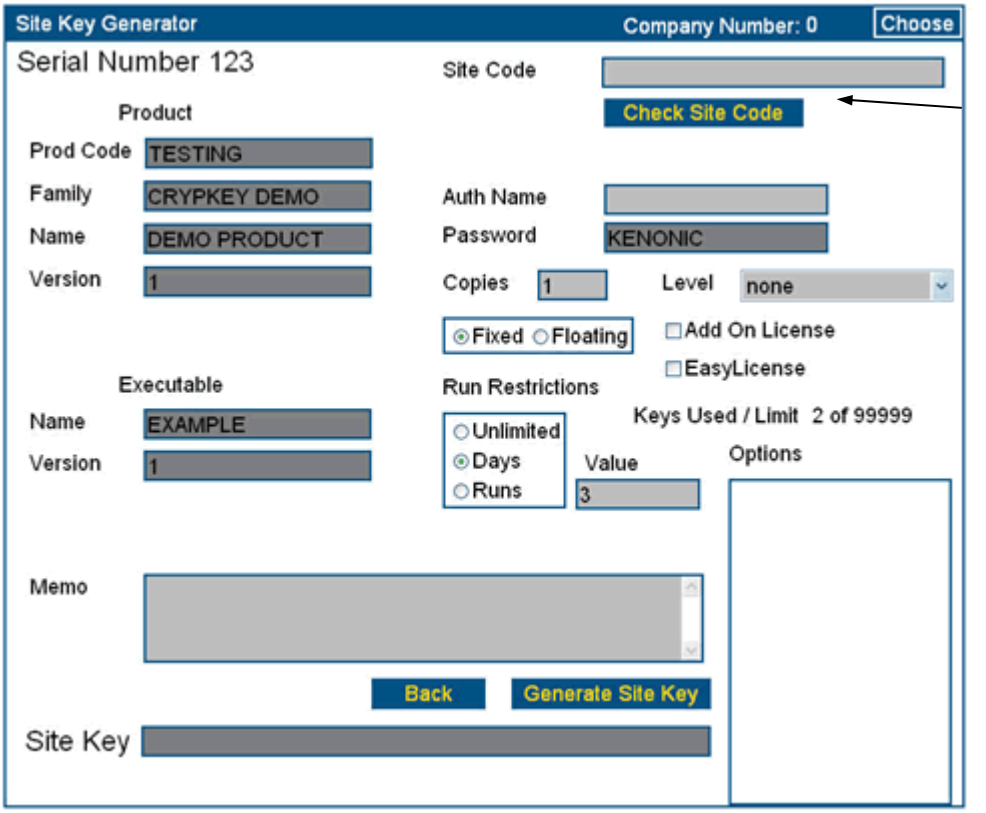


Figure 4-11 Site Key Generator screen

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:

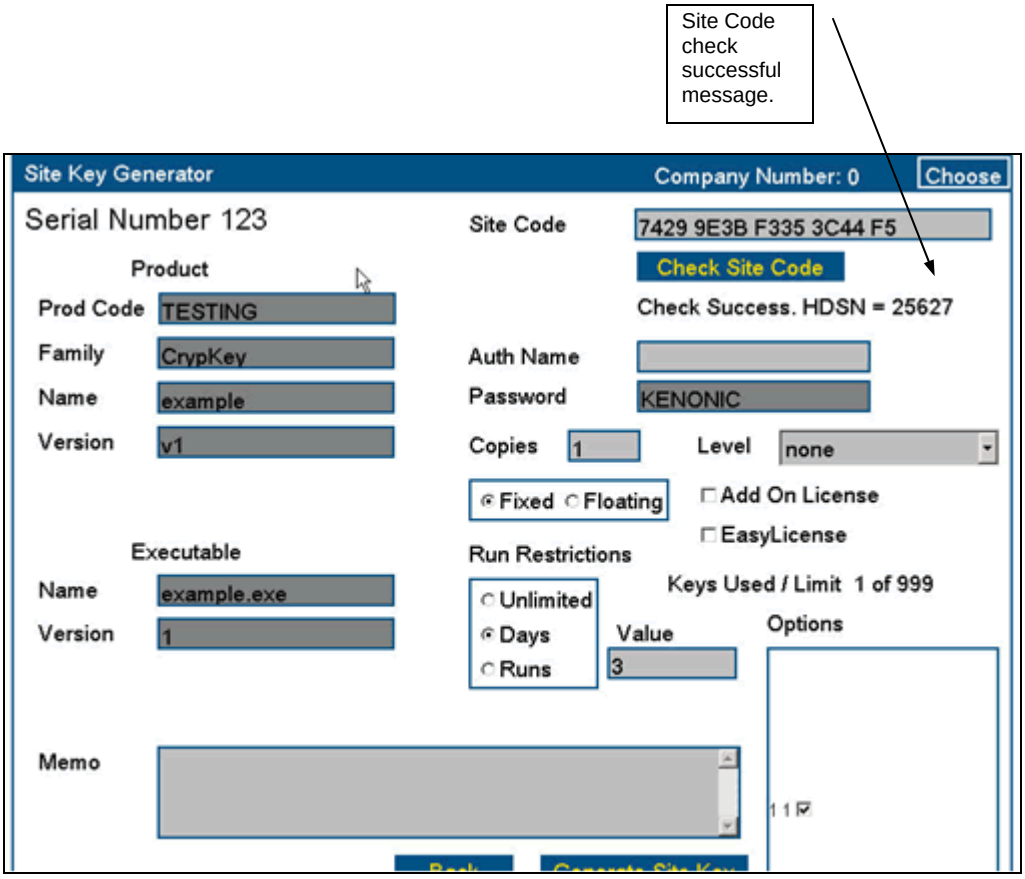


Figure 4-12 Check Site Code test message

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):

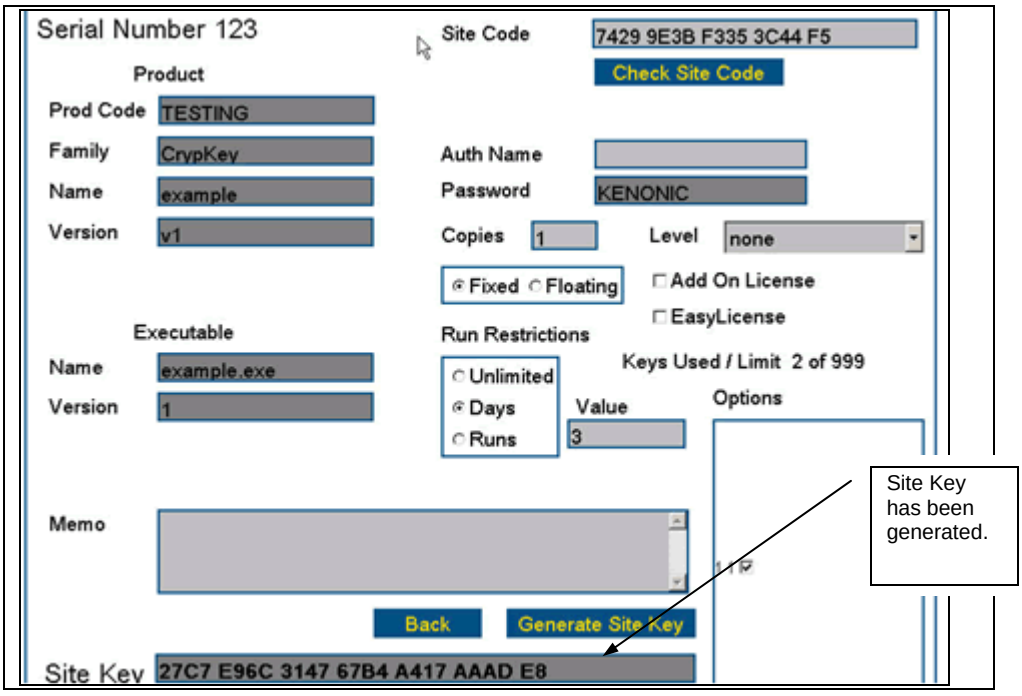


Figure 4-13 Manually generated Site Key

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	
Product	
Serial Number	A Serial Number is tied directly to a Product Code for a specific customer. (see Customer Information screens in the section above, *Add Customer Information*).
Prod Code	Product Code which the Serial Number is associated with.

Field	Description
Family	Product family, defined in the Product Family records in CasperWeb.
Name	Product name.
Product Version (number)	Product version number — this is the version number set for this Product Code.
Lic Type	License type is no longer used.
Executable	
Name	Filename specified in the Product Code creation. This is the filename that you used the 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 3-24 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	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 For floating licenses: the number of users who can concurrently use the software over a network. Format: I9.
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	This dual field contains: - The number of authorizations already generated for this Serial Number;

Field	Description
	- The maximum allowable number of authorizations that can be generated for this Serial Number (as defined in the Customer Information screen, see *Edit Customer Information* on page 140).
Run Restrictions	Any of the following restrictions on the customer's use of the program: - 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) 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.
Value	Number applying to the selected Run Restrictions.
Options	Checkboxes representing options 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 CasperWeb Main menu, SuperUser submenu. See Figure 5-1 SuperUser menu:

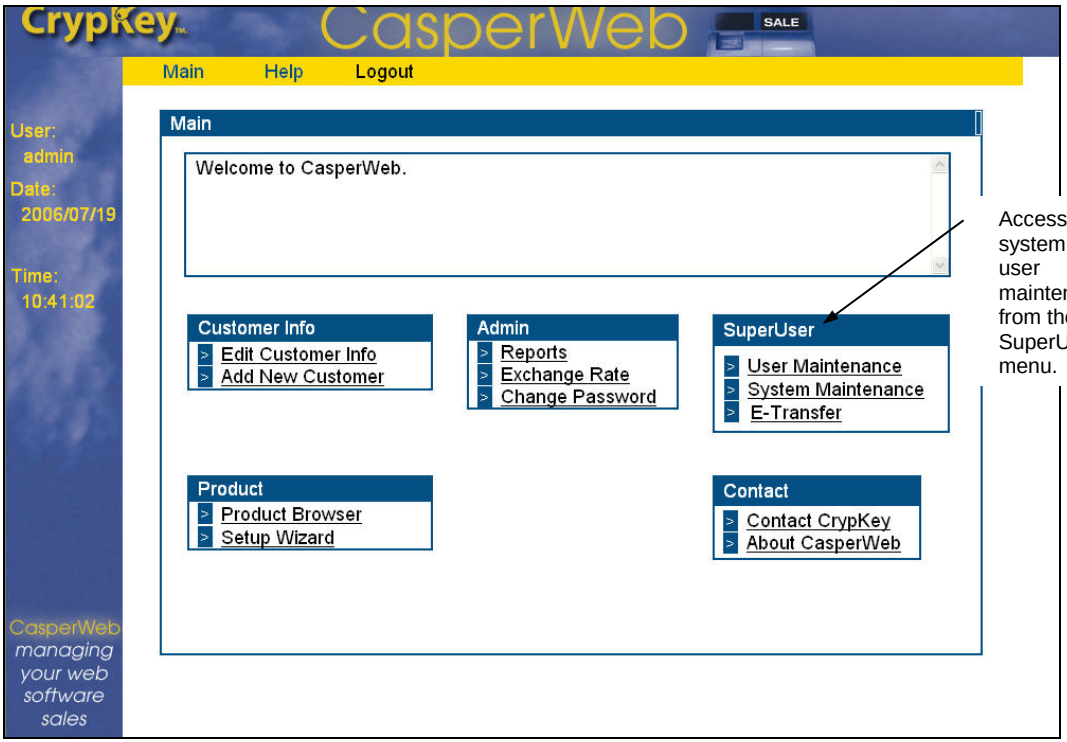


Figure 5-1 SuperUser menu

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 CasperWeb 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:

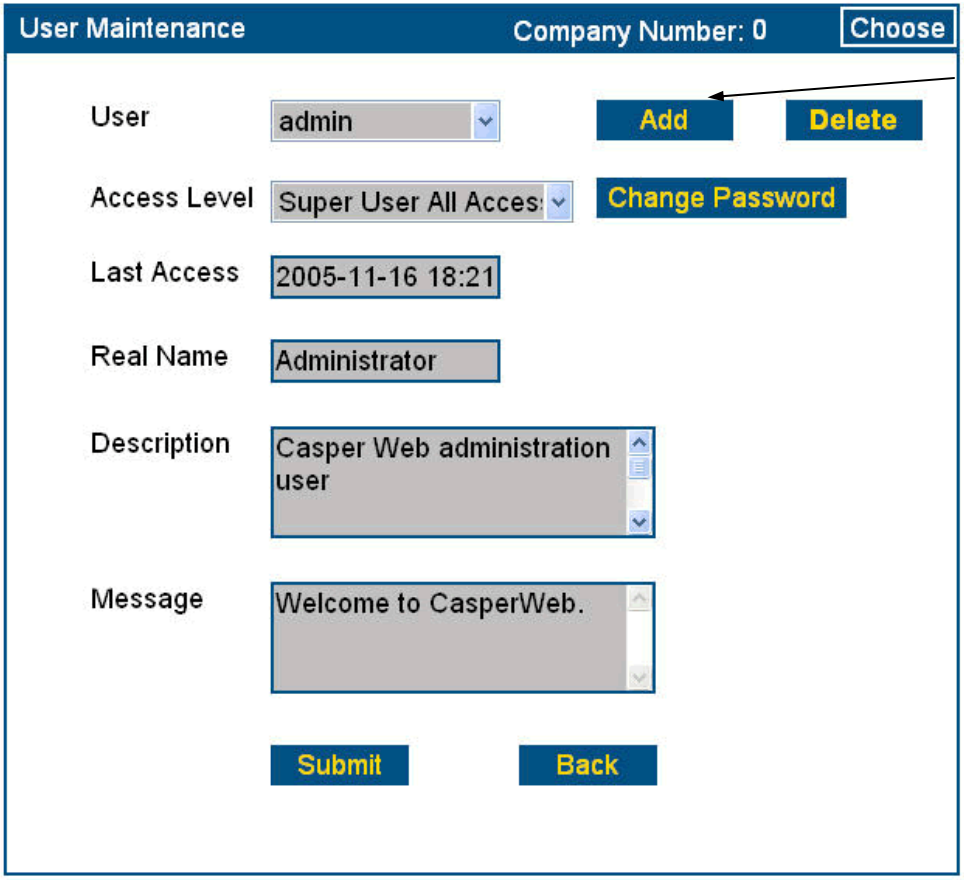


Figure 5-2 User Maintenance screen

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

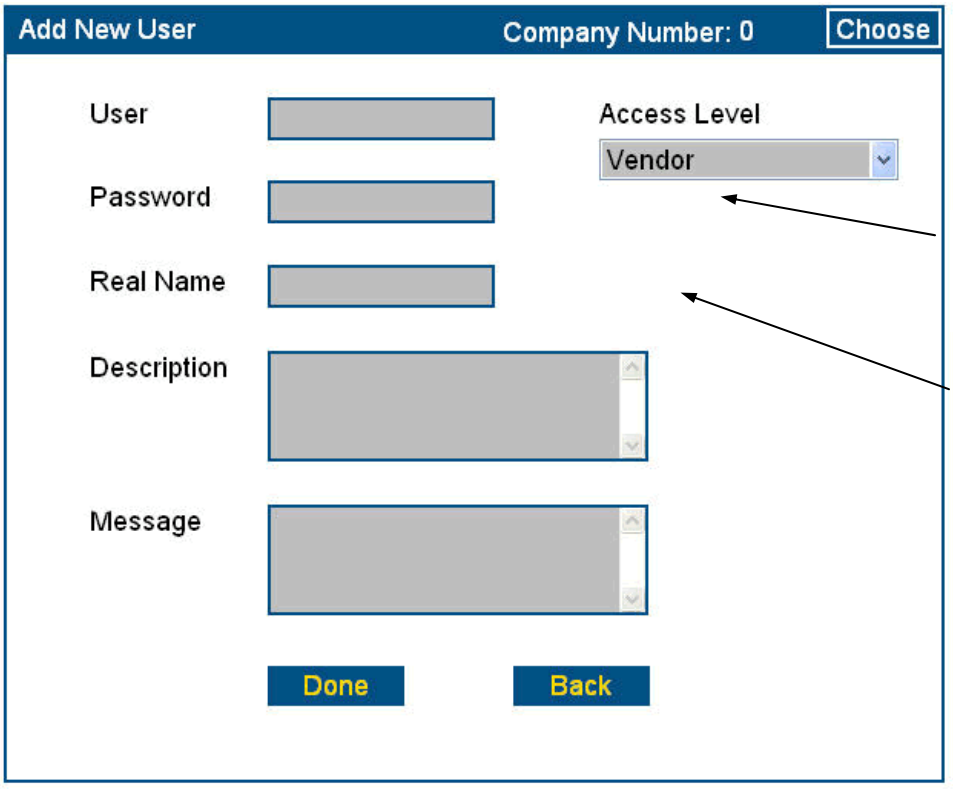


Figure 5-3 Add New User screen

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.

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

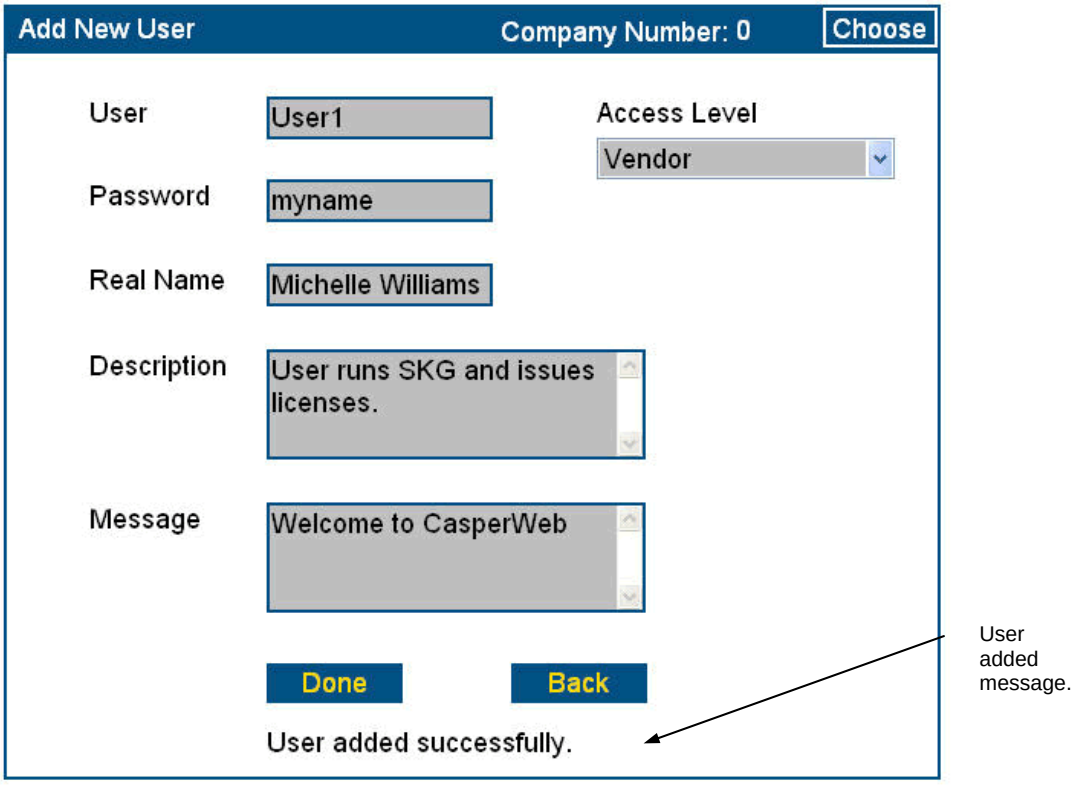


Figure 5-4 New User added successfully message

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

DELETE A USER

Procedure

1. 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.
2. Click **Delete**. The **Delete** button will change to **Confirm Delete**.

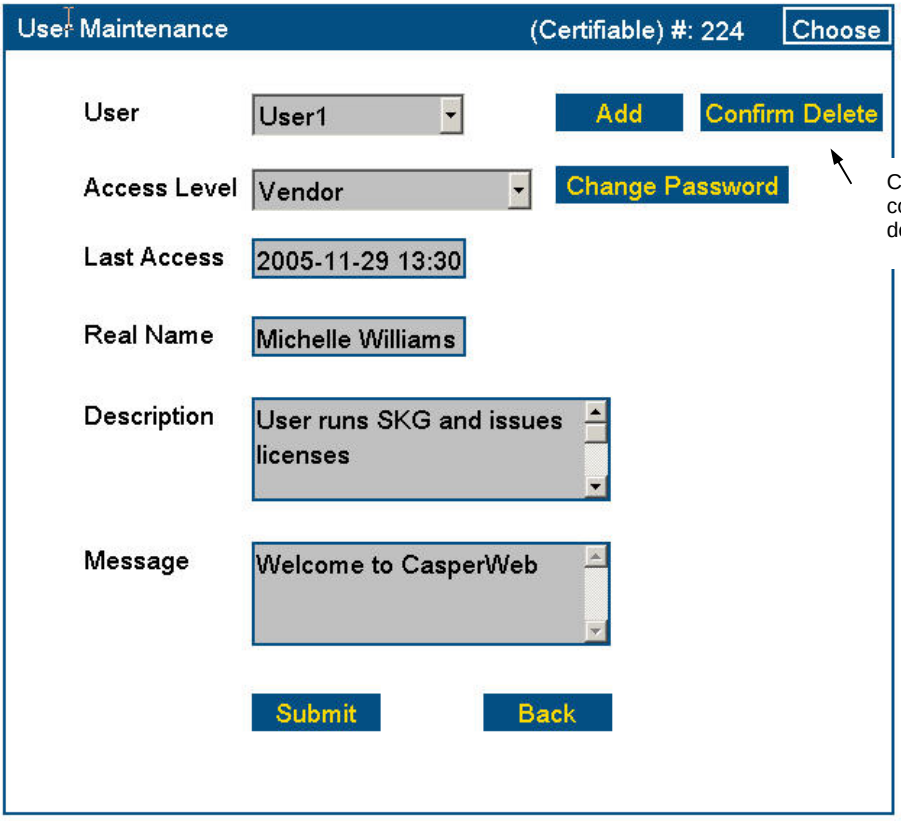


Figure 5-5 Delete User confirmation

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

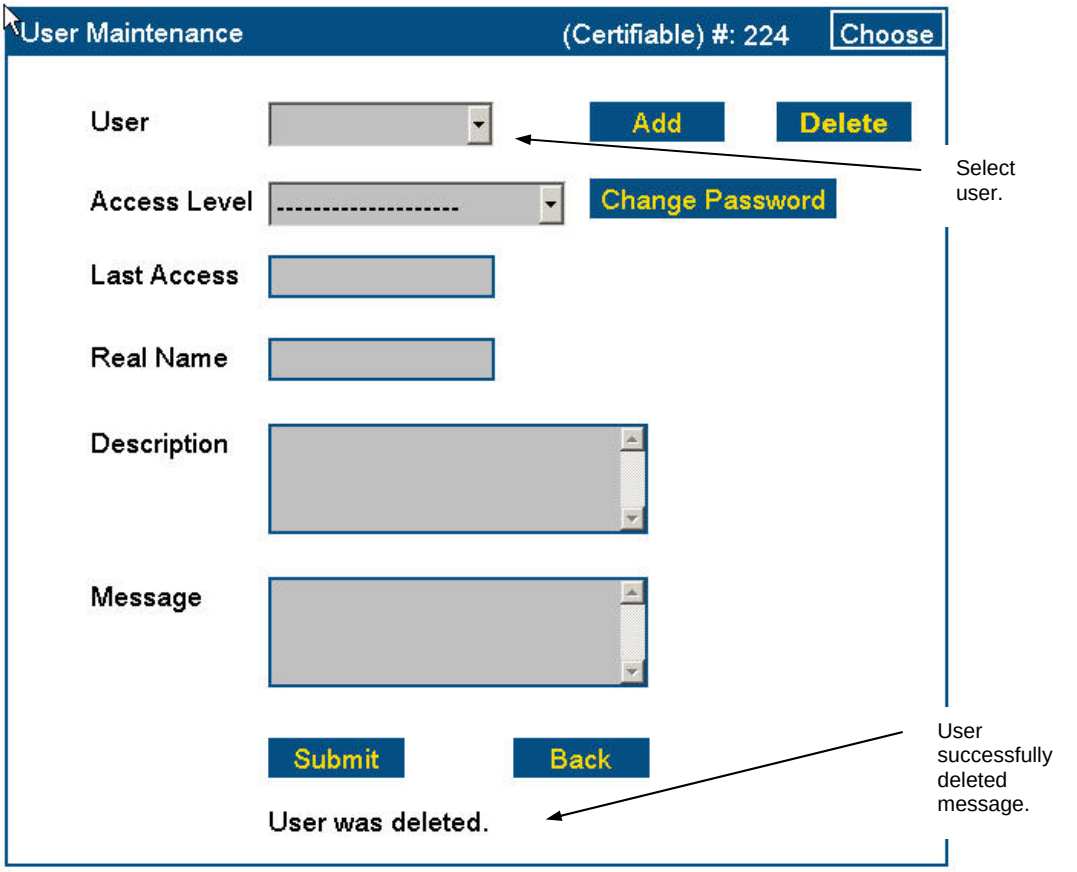


Figure 5-6 User Deleted message

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:

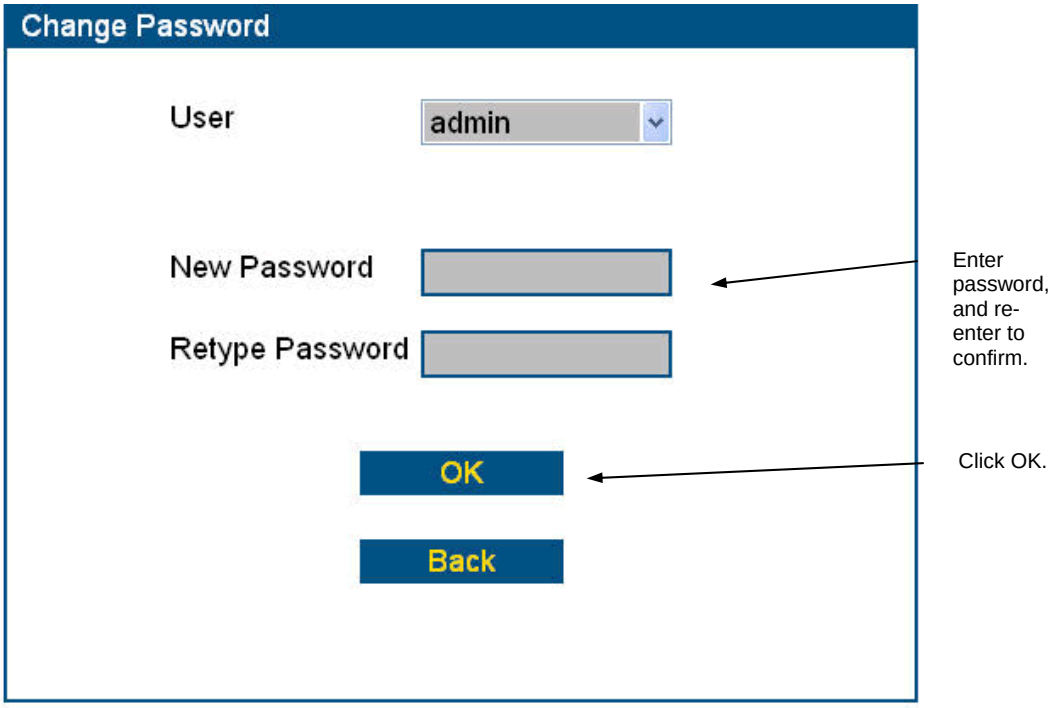


Figure 5-7 Change Password – from User Maintenance screen

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 CasperWeb 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:

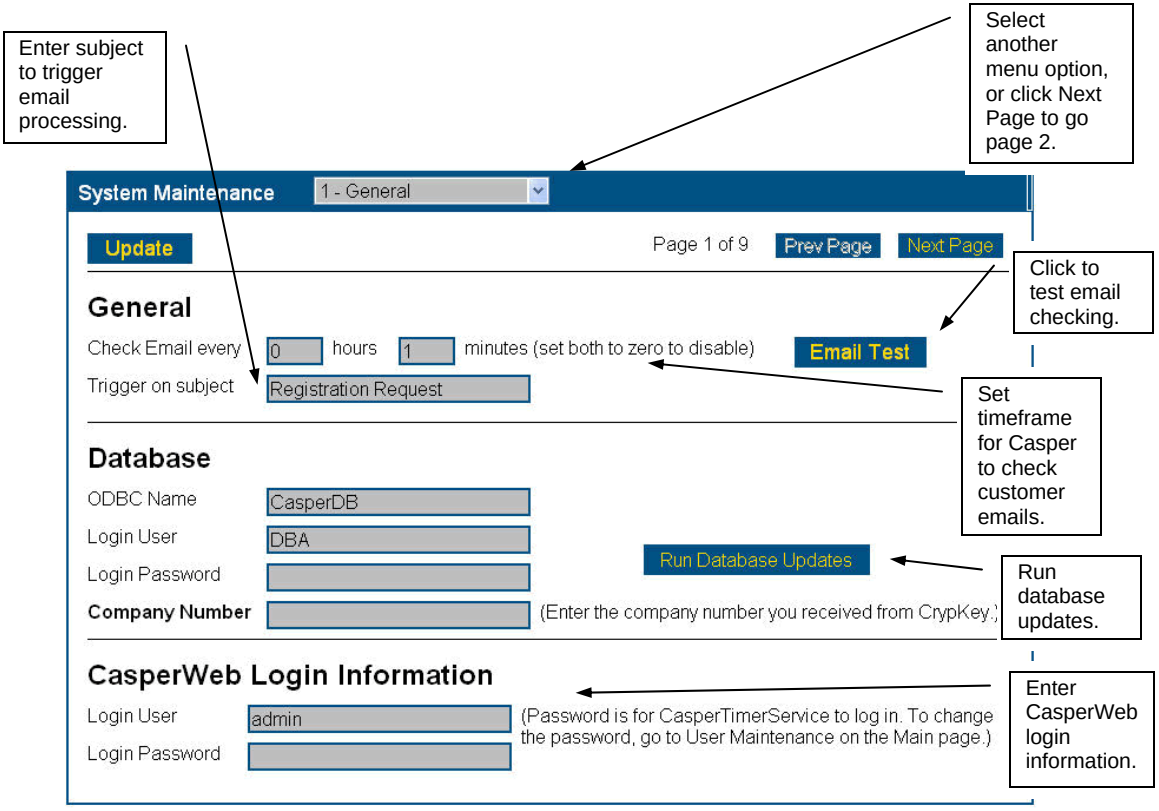


Figure 5-8 System Maintenance – General

3. 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.
4. The **General** page is divided into three sections: General, Database, and CasperWeb Login Information.
5. **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:

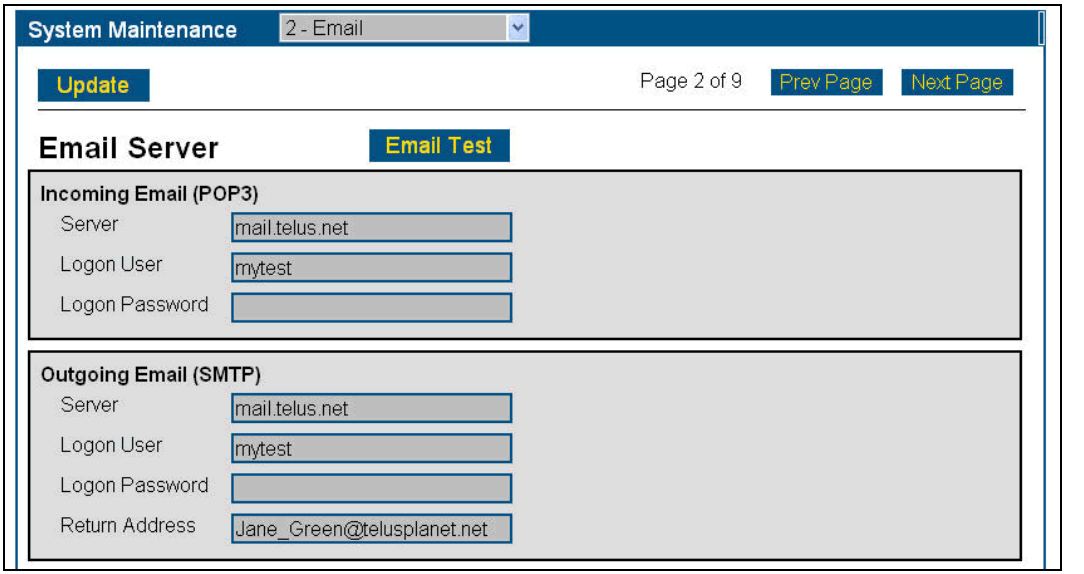


Figure 5-9 System Maintenance – Email Server

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	POP3 is the only incoming email type Casper supports. 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.
Outgoing Email (SMTP) server/logon user/logon password/return address	SMTP is the only outgoing email type Casper supports. 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. 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. **Note**: The return email address must be filled in. Some email servers require it.

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:

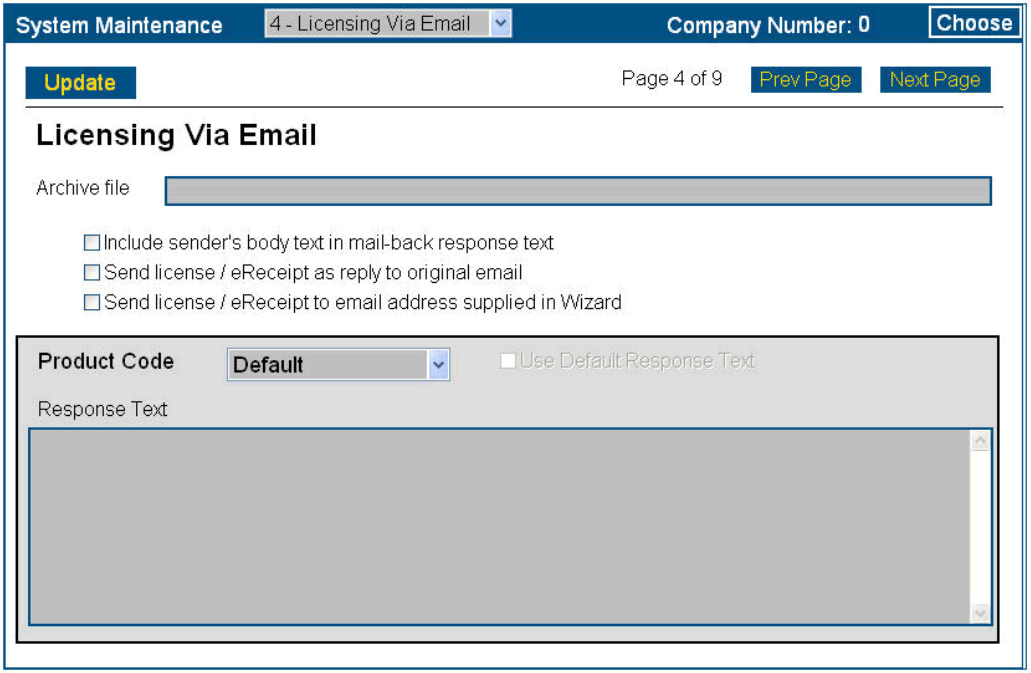


Figure 5-10 System Maintenance – Licensing via Email

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 3-37 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:

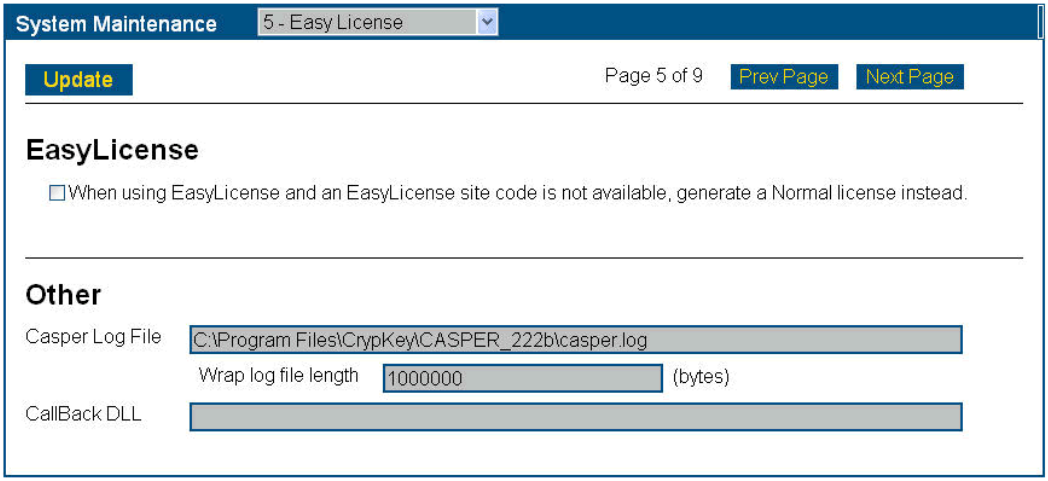


Figure 5-11 System Maintenance – EasyLicense

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 *Appendix A* 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 133).

Procedure

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

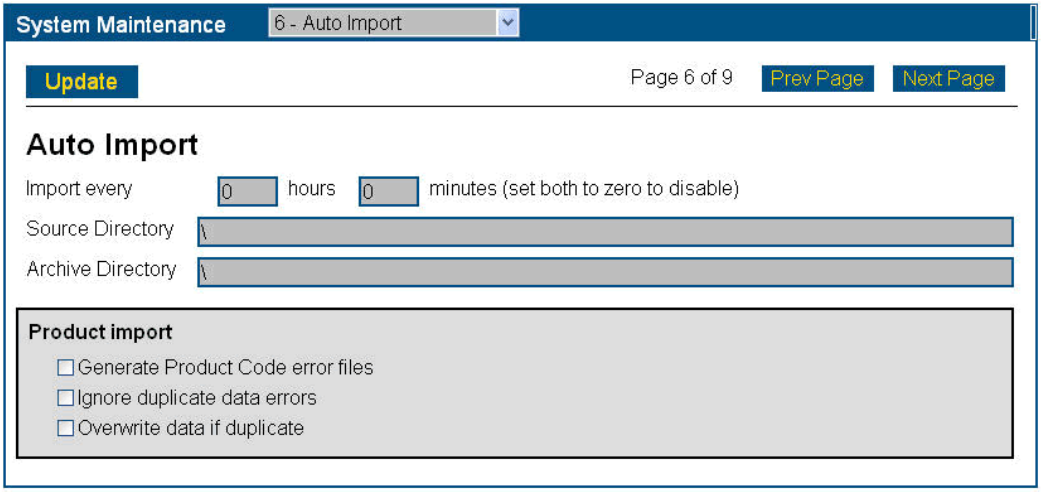


Figure 5-12 System Maintenance – Auto Import

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)	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

Field	Description
	Directory for reprocessing. Error files and log files will be kept in the Archive Directory as well.
Product Import	**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. **Ignore duplicate data errors** – this setting allows the import of duplicate data without generating an error. **Overwrite data if duplicate** – this setting allows imported data to overwrite existing database data, even in cases of duplication.

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
- **sk32mmtd.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 caspertimerservice

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.

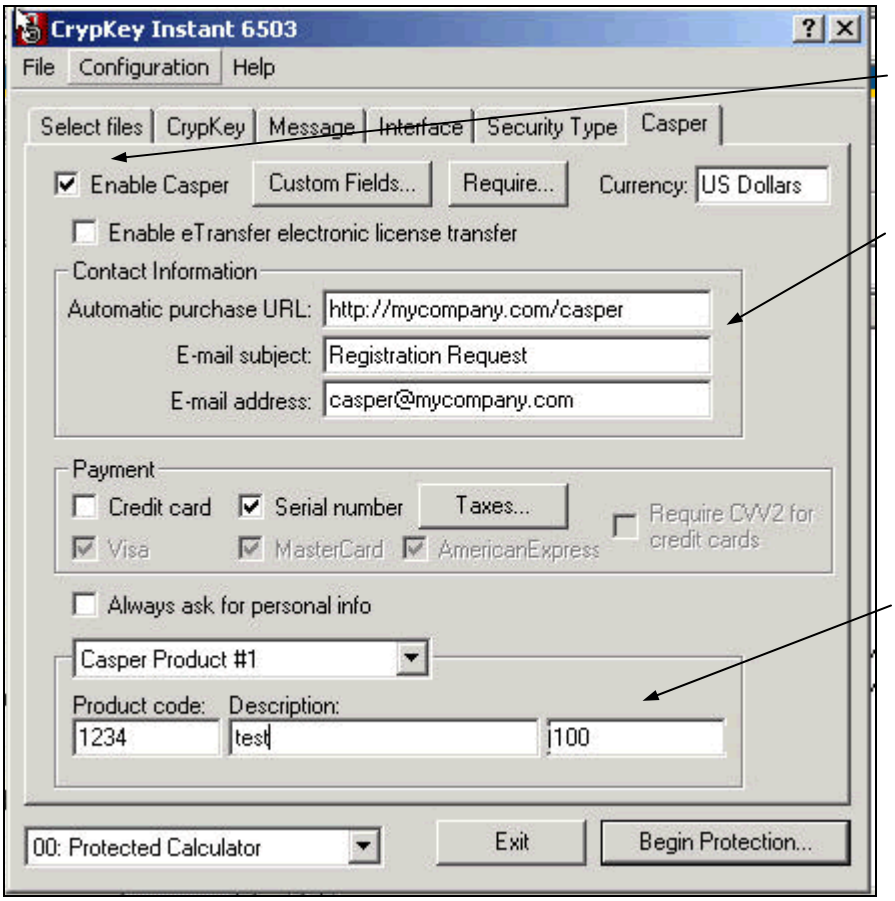


Figure 6-1 CrypKey Instant with Casper enabled

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 CasperWeb Main menu/Admin submenu.

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

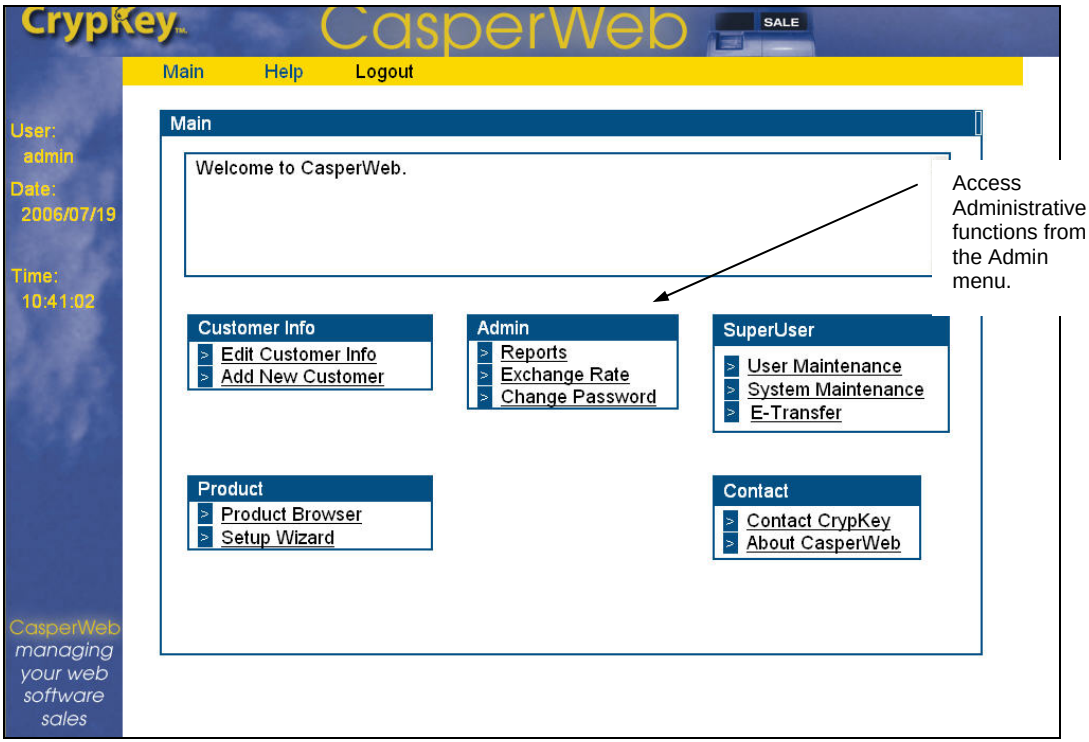


Figure 7-1 Administration menu

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

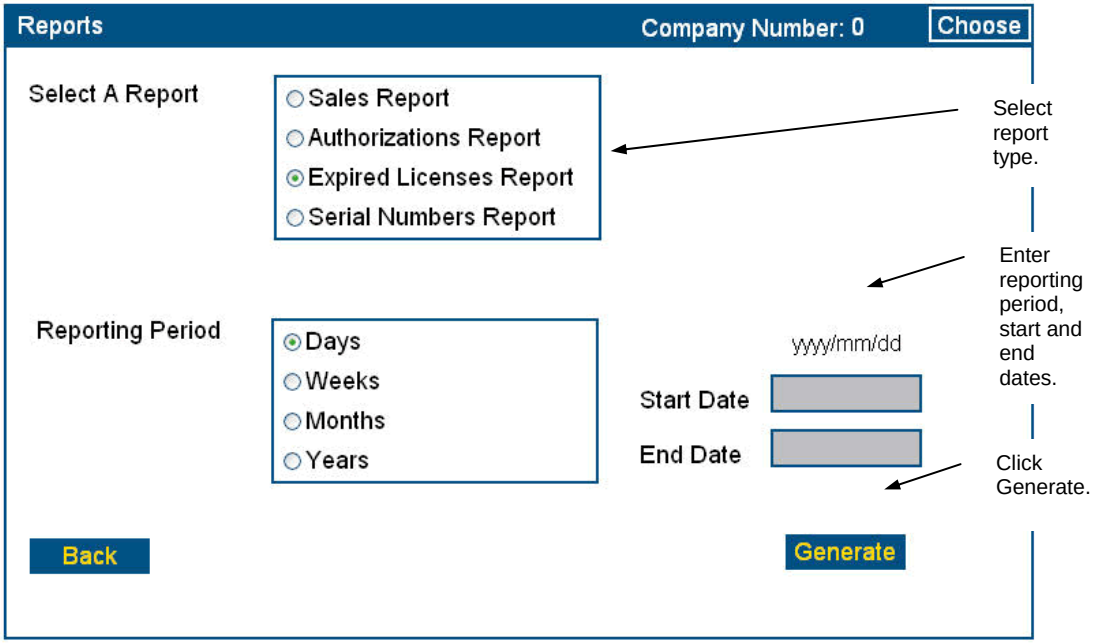


Figure 7-2 Reports screen

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:

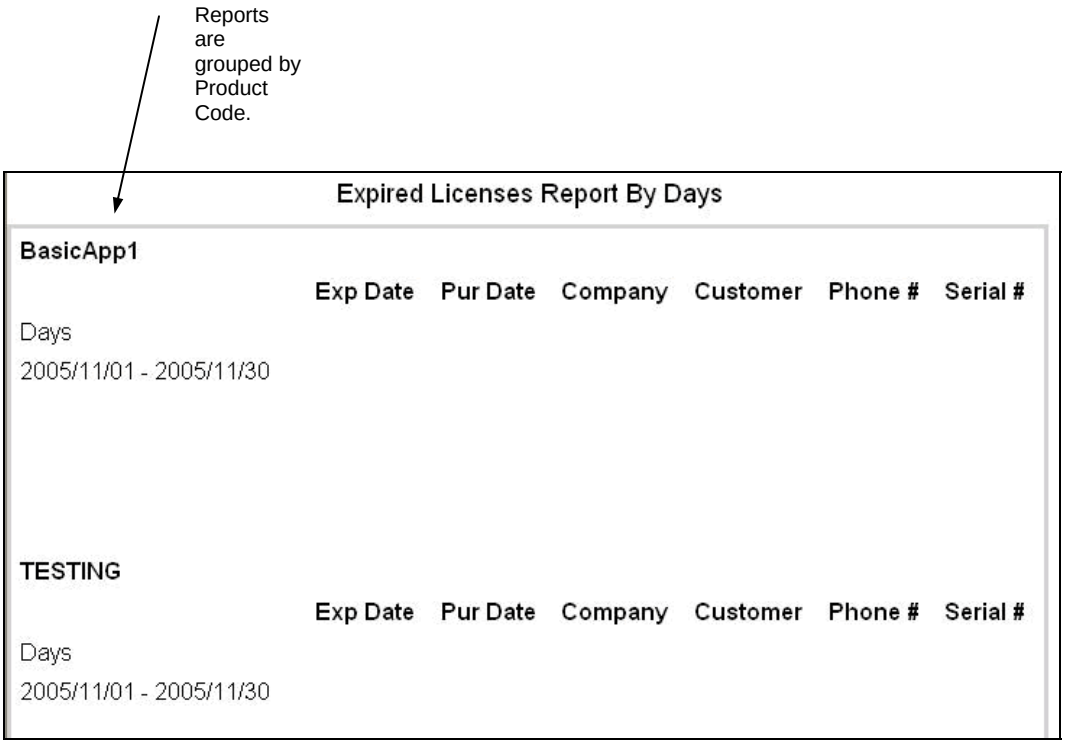
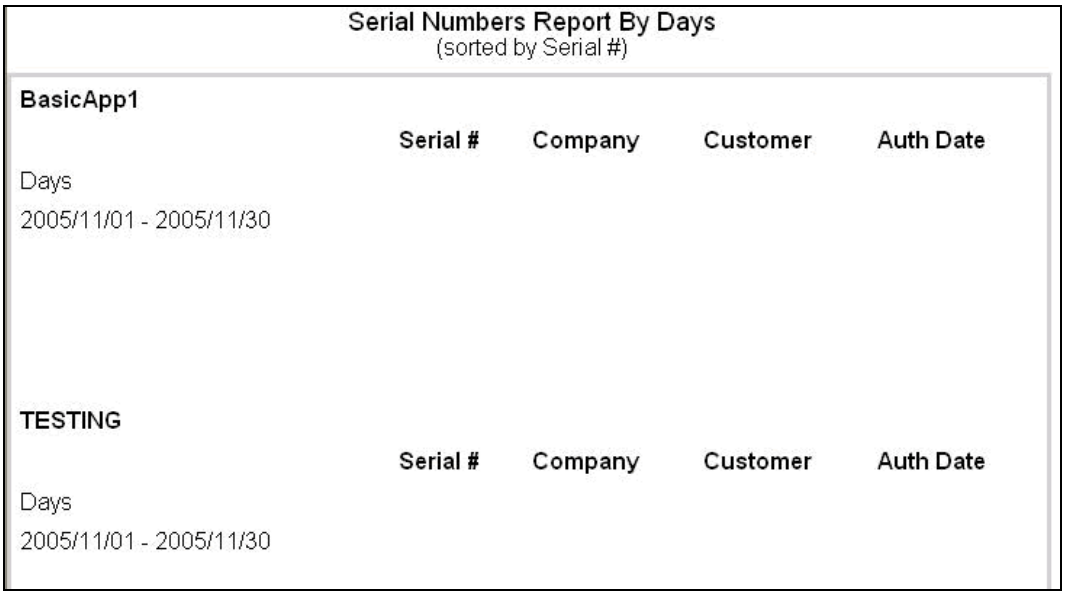


Figure 7-3 Expired Licenses Report by Day

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

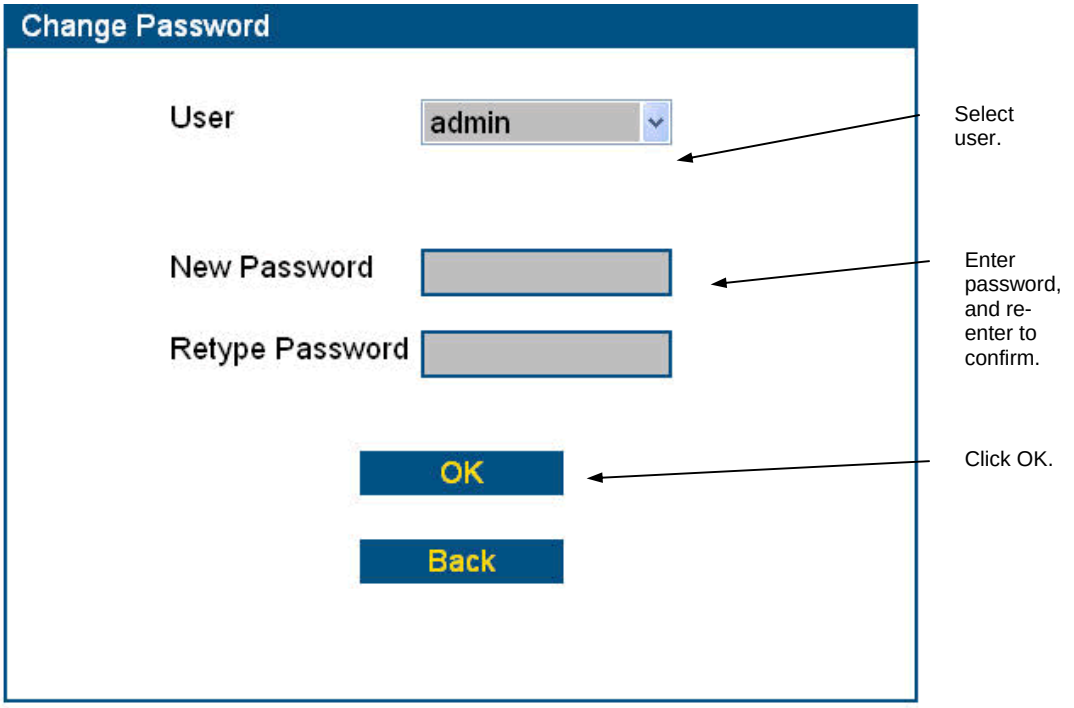


Figure 7-5 Change Password – from Admin menu

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**.

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