Read First

IMPORTANT

As you install the Smart Card Security Kit, it is important to follow these instructions carefully. Errors or missed steps may cause problems in the future.

NOTE: Some procedures vary depending on whether you are installing under Windows 95/98 or Windows NT. These variations are clearly indicated where applicable.

SMART CARD SECURITY COMPONENTS

The Smart Card Security Kit package includes:

1. PCMCIA or Serial Smart Card Reader: This device interfaces your computer to the smart card.
2. Smart Card: This is the key to your computer. It contains your personal codes.
3. CD–ROM: This contains application software and online manuals.
4. Luggage Tag (Notebook Kit only): This slotted card can be attached to your computer carrying case to discourage thieves.
5. Mouse Pad (Desktop Kit only): This can indicate that your desktop system is protected.
6. Hardcopy Documents: These provide an overview of the applications.

DOCUMENTATION OVERVIEW

The Smart Card Security Kit contains a Quick Reference Manual and this Read First folder. The Quick Reference Manual provides general information on using SCsecurity software. This Read First folder provides a condensed description of installation and removal procedures.

Also, the CD–ROM contains a detailed Administrator Reference Manual (Admin.pdf) and User Reference Manual (User.pdf) that can be viewed and/or printed using the included Adobe Acrobat Reader.

PREPARING FOR INSTALLATION

Before you install SCsecurity software, note the following:

- Refer to Part 1 of the Quick Reference Manual to determine which security management system you want to use and which installation you should perform.
- If you cannot use the diskette drive and CD–ROM drive simultaneously, you should install from diskettes. Use the Installation Utility CD–ROM to make the installation diskettes from blank, formatted diskettes. The User Reference Manual includes more information.
- Close all programs, including anti–virus programs.
- Decide how the Administrator will protect the emergency key (single or trustees).

INSTALLING SMART CARD SECURITY SOFTWARE

1. Start Windows and insert the CD–ROM. If AutoRun is enabled, the installation utility will load automatically.
2. If AutoRun is not active, select **Start**, and then **Run**.
3. Type *d:\setup*, where *d:* is the letter designating the CD–ROM drive, which may be other than *d:* for your system. Press **Enter** and an introduction screen will be displayed.
4. Select **Install** under SCsecurity Software. The **Welcome** screen appears.

5. Select **Next** to continue the installation. A Software License Agreement appears.
6. Select **Yes** to accept the terms of the License Agreement. The **Installation Configuration** window appears. **Help** describes each type of installation.
7. Select the desired type of installation. Refer to the appropriate installation instructions.

ADMINISTRATOR INSTALLATION

1. From the **Installation Configuration** screen, select **Administrator** to install the Administrator Security Kit.
2. The **Choose Destination Location** may open. If it does, choose the folder where you want to install SCsecurity. Select **Next**.
3. You will be asked for Emergency Access Information.
   a. Type the name of the administrator responsible for the protection and emergency decryption of encrypted files in the **Emergency Access Administrator** text box. Press **Tab** to move to the next parameter.
   b. Type the name of the organization to which the administrator in Step "a" belongs in the **Administrator's Organizatio**n text box. Press **Tab** to move to the next parameter.
   c. Type the name of the group within the organization in the **Administrator's Work Group** text box.
4. Select the type of protection required for the **Emergency Key**, either **Single passphrase** or **Split among trustees.**
   If you select **Single passphrase**, the **Emergency Key Passphrase** dialog box appears.
   d. Enter the passphrase that will protect the Emergency Key.
   e. Confirm the passphrase.
   f. Select **OK** to confirm the information.
   If you select **Split among trustees**, you must indicate the number of trustees. All trustees must be present when the Administrator software is installed in order to enter their passphrases, which must be kept private by the trustees.
   g. Enter the number of trustees in the **Split among trustees** section. The number of trustees must be between 2 and 255.
   h. Enter the number of trustees required for Emergency Access.
5. Select the backup location for the Administrator Preference Files.
6. Select the storage location for the User Setup file (**pkfile**) that you are creating (normally on the User Setup diskette). This completes the Administrator SCsecurity Installation.

USER INSTALLATION

NOTE: The User Setup diskette (**pkfile**) must be available for this type of installation. (See Step 6 under ADMINISTRATOR INSTALLATION.)

1. From the **Installation Configuration** screen, select **User** to install the User Security Kit.
2. The **Choose Destination Location** window may open. If it does, choose the folder where you want to install SCsecurity. Select **Next**.
3. The **Card Reader Selection** window opens. Select the type of card reader.
   Select **PCMCIA** if you have a PCMCIA smart card reader.
   Select **Serial Port Attached** if you have a serial reader.
4. Refer to the "Attaching the IBM Smart Card Reader" section of the Quick Reference Manual, and attach the reader, if it is not already attached. If you are attaching a serial port reader, you may be asked to choose the COM port. Refer to the Installation Help for more information.

NOTE: If you are using Windows NT, skip to Step 8. Otherwise, continue with Step 5.

5. You will be asked to reboot the computer. Select **Restart**.
6. When the installation continues, insert the smart card into the reader and select **OK**.
7. In the **Admin PIN Validation** dialog box, have your administrator enter the Admin PIN. (The preset PIN is "1234".)

8. You will be asked for the administrator public key file (**pkfile**) that was created during the administrator setup. Locate the file (usually on the User Setup diskette supplied by the administrator) and select **Open**.
9. Follow the appropriate steps below for your operating system.

If you are using Windows 95/98:
10. You will be asked to enter your User PIN for the card. (The preset PIN is "1234".)
11. The **SCsecurity Initialization** window opens.
>> Select **Change User PIN** to change the User PIN.
>> Select **Change User Information** to verify and/or change the user name and other information.
12. Select **Next**. You will be asked if you want to install the secure screen saver as the default Windows screen saver. We recommend that you select **Yes**.
13. Select **Restart** to reboot the computer.

If you are using Windows NT:
10. You will be asked if you want to install the secure screen saver as the default Windows screen saver. We recommend that you select **Yes**.
11. Setup has finished. Click **Restart**. The system will restart.
12. When the system restarts, the **SCsecurity** screen appears. Insert the smart card, or press **Ctrl+Alt+Del** to log on.
13. The **SCsecurity Login** screen appears. Enter your **User Name** and **Password** and select **OK**.
14. Select **Smart Card**. In the **Smart Card Options**, select **Change PIN**. The **Smart Card Options (PIN Maintenance)** window appears.
15. Enter the PIN for the card and select **Administrator** or **User**.
16. Enter the new PIN in the **New PIN** field and confirm it in the **Confirm New PIN** field. Select **OK** to validate the changes.
17. In the **Smart Card Options** window, select **Cancel** to return to the **SCsecurity Login** window.

STAND–ALONE SECURITY INSTALLATION

1. From the **Installation Configuration** screen, select **Stand–Alone Security** to install both the User and Administrator Security Kits for self–administered security control.
2. The **Choose Destination Location** may or may not open. If it does, choose the folder where you want to install, and select **Next**. The **Card Reader Selection** window opens.
3. Select the type of card reader.
>> Select **PCMCIA** if you have a PCMCIA smart card reader.
>> Select **Serial Port Attached** if you have a serial reader.
4. Refer to "Attaching the IBM Smart Card Reader" section of the Quick Reference Manual, and attach the reader, if it is not already attached.
- If you are attaching a serial port reader, you may be asked to select the COM port. Refer to the Installation Help for more information.
5. You will be asked for Emergency Access Information.
   a. Type the name of the administrator responsible for the protection and emergency decryption of encrypted files in the **Emergency Access Administrator** text box. Press **Tab** to move to the next parameter.
   b. Type the name of the organization to which the administrator in Step "a" belongs in the **Administrator's Organization** text box. Press **Tab** to move to the next parameter.
   c. Type the name of the group within the organization in the **Administrator's Work Group** text box.
6. Select the type of protection for the Emergency Key, either **Single passphrase** or **Split among trustees.** If you select **Single passphrase**, the **Emergency Key Passphrase** dialog box appears.
   a. Enter the passphrase that will protect the Emergency Key.
   b. Confirm the passphrase.
   c. Select **OK** to confirm the information.

If you select **Split among trustees**, you must indicate the number of trustees. All trustees must be present when the Administrator software is installed in order to enter their passphrases, which must be kept private by the trustees.

    d.   Enter the number of trustees in the **Split among trustees** section. The number of trustees must be between 2 and 255.

    e.   Enter the number of trustees required for Emergency Access.

7. Select the backup location for the Administrator Preference Files.
8. Follow the appropriate steps below for your operating system.

If you are using Windows 95/98:

9. You will be asked to reboot the computer. Select **Restart**.
10. When the installation continues, insert the smart card into the reader and select **OK**.
11. In the **Secure Logon** dialog box, enter the User PIN. (The preset PIN is "1234".)
12. The **SCsecurity Initialization** window opens.

               Select **Change User PIN** to change the PIN.
               Select **Change User Information** to change the user information.

13. Select **Next**. You will be asked if you want to install the secure screen saver as the default Windows screen saver. We recommend that you select **Yes**.
14. Select **Restart** to reboot the computer to complete the installation.

If you are using Windows NT:

9. You will be asked if you want to install the secure screen saver as the default Windows screen saver. We recommend that you select **Yes**.
10. When the system restarts, the **SCsecurity** screen appears. Insert the smart card or press **Ctrl+Alt+Del** to log on.
11. The **SCsecurity Login** screen appears. Enter your **User Name** and **Password** and select **OK**.
12. Select **Smart Card**. In the **Smart Card Options**, select **Change PIN**. The **Smart Card Options (PIN Maintenance)** window appears.
13. Enter the PIN for the card and select **Administrator** or **User**.
14. Enter the new PIN in the **New PIN** field and confirm it in the **Confirm New PIN** field. Select **OK** to validate the changes.
15. In the **Smart Card Options** window, select **Cancel** to return to the **SCsecurity Login** window.
16. Enter the new PIN in the **PIN** field and select **OK**.

CUSTOM INSTALLATION

CAUTION: Custom Installation is for advanced users only. To make User SCsecurity Software install and operate properly, you must have the Smart Card Reader driver and SCBASE installed.

1. From the **Installation Configuration** screen, select **Custom** installation to select the security components to be installed.
2. Select the components to be installed on the **Select Components** screen and select **Next**.
   If you are operating under Windows 95, you must install DCOM95 unless it is already installed. Other operating systems do not require that DCOM95 be installed.

   The installation instructions referenced below will vary slightly depending on whether you are installing DCOM95, SCBASE, and the reader driver. Advanced users should have no problem following the on–screen procedures.

3. Follow the appropriate instructions for the type of installation you have chosen.
   If you have chosen ADMIN, follow the instructions under ADMINISTRATOR INSTALLATION above beginning at Step 2. If you have chosen USER, follow the instructions under USER INSTALLATION above beginning at Step 2. If you have chosen ADMIN and USER, follow the instructions under STAND–ALONE INSTALLATION above beginning at Step 2.

INSTALLING ADDITIONAL PRODUCTS

Other products are included on the SCsecurity CD–ROM. To install any of these applications, such as GemSAFE software, Norton AntiVirus, or Adobe Acrobat, use the following procedure.

1. Start Windows and insert the CD–ROM. If AutoRun is enabled, the installation utility will load automatically.
2. If AutoRun is not active, select **Start**, and then **Run**.
3. Type *d:*\setup, where *d:* is the letter designating the CD–ROM drive, which may be other than *d:* for your system. Press **Enter** and an introduction screen will be displayed.
4. Select **Install** under the product name that you want to install on the Installation menu. Follow the on–screen instructions.

UNINSTALLING THE SMART CARD SECURITY KIT

Uninstalling SCsecurity software removes the IBM Smart Card Security Kit from your computer and removes references to its files in the Windows registry and other locations. After removing SCsecurity software, you must also remove Microsoft SCBASE.

IBM recommends that you use the standard Windows **Add/Remove Programs** option on the Windows Control Panel to uninstall the IBM Smart Card Security Kit user software. Save or back up your user preference file (**userpref.!!!**) before uninstalling. The backup will preserve your smart card key and allow you to restore your unique version of the IBM Smart Card Security Kit.

To uninstall the IBM Smart Card Security Kit from your computer:
1. Log on to the Desktop. Save all open documents and close all applications. Exit Windows Explorer if it is running.
2. Double–click **My Computer**, then double–click **Control Panel**.
3. From the Control Panel, choose **Add/Remove Programs**. The **Add/Remove Programs Properties** dialog box opens.
4. Choose **SCsecurity** from the Install/Uninstall program list, and select **Add/Remove**. A confirmation dialog box appears.

NOTE: If you are uninstalling a Stand–Alone installation or a User installation on a Windows 95/98 system, continue with Step 5. Otherwise, skip to Step 7.

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5. The **SCsecurity Uninstall** dialog box opens. This dialog box warns that you need to decrypt all encrypted files before uninstalling SCsecurity.
6. Select **Find** to locate encrypted files. Once located, decrypt files by right-clicking on them. Close the **Find** dialog box, then select **Continue**.
7. The **Remove Shared File?** dialog box opens. Uninstall removes all shared programs used by the IBM Smart Card Security Kit.
8. Choose **Yes To All**. A confirmation dialog box opens.
9. Choose **Yes**. Uninstall continues to remove all the items on the uninstall check list. A few items may need to be removed manually.
10. The **SCsecurity Uninstall** dialog box opens. Choose **OK** or press **Enter** to reboot your PC and complete the uninstall. Windows restarts.