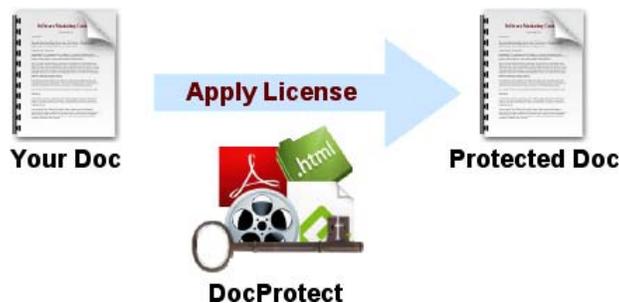


DocProtect & Safe Activation

Excel Software
www.excelsoftware.com

DocProtect can generate a computer-unique, password-protected Mac or Windows application from a variety of source document formats. This paper describes a step-by-step process to automate the activation process on the customer computer using a Serial Number. The protected application is linked to the Safe Activation server.

If you are reading this document, you may already know how to build a protected application with DocProtect that requires a unique password. If you plan to use DocProtect together with QuickLicense, disregard this document and refer to Tutorial 2 that comes with QuickLicense.



Build Protected Application with DocProtect

A manual activation process requires the vendor to get the Password number shown on the customer's Enter Password dialog and return back the password. Safe Activation can fully automate this process, saving time for both the vendor and the customer.

The screen shots and description provided here show DocProtect running on a Mac computer and a vendor account on Safe Activation Service 1. The information presented is also applicable to DocProtect Windows. When using DocProtect with Safe Activation Service 2 or 3, the screens may look different.

Vendor Info

Log into your account on Safe Activation. Excel Software sent you a Username and Password when your vendor account was created.

Click the **Vendor Info** link on the left side of the window. Your unique 8-digit Vendor ID shown at the top left corner will later be needed to construct a URL for your product activation page.

The screenshot shows a web browser window at safesactivation.com. The main heading is 'Vendor Account'. A sidebar on the left contains a menu with the following items: General (Home Page, Vendor Info, Password, Save & Restore, Log Off), Products (List & Select, Add, Edit, Delete), Custom Forms (List & Select, Add, Edit, Delete), Serial Numbers (Search & Groups, Edit), and Customers. The main content area is titled 'Vendor Info' and contains a form for 'Company and Account Data'. The form fields are as follows:

Vendor ID*	20080803	* = Readonly Field	Company	<input type="text"/>
UserName(Login)*	Test		Street Address	<input type="text"/>
First Name	<input type="text"/>		City	<input type="text"/>
Last Name	<input type="text"/>		State	<input type="text"/>
Company Email	<input type="text"/>		Country	<input type="text"/>
Phone	<input type="text"/>		Eip(Postal Code)	<input type="text"/>
Activation Email	info@excelsoftware.com		Vendor Code	33084195015383182087083349

There is a 'Save Data' button at the bottom of the form.

Enter a random 26-digit number in the Vendor Code field. Safe Activation doesn't use this value when interacting with DocProtect, but it will complain if you don't enter a valid value.

Safe Activation is often used with other protection and licensing products like QuickLicense that do use the Vendor Code field.

To receive an email message when your product is activated, enter your email address into the Activation Email field. This email address is also used to send yourself a list of Serial Numbers generated and stored within your account. These Serial Numbers are distributed to customers during the purchase process. Click the **Save Data** button to save entered data on this screen and others throughout the tutorial.

Custom Form

Click the **Add** link in the Custom Forms section of the menu to present the Custom Form Edit page. Name the form, TinyForm and scroll to the checkbox section of the Activation page.

Set the `Visible` and `Require` checkboxes of the Request Number and Serial Number fields. Clear all other checkboxes.

Scroll to the bottom of the page and click the **Save Data** button.

Serial Number Group

The vendor can generate a batch of serial numbers from Safe Activation or upload existing serial numbers into the account. Select the **Search & Groups** link in the Serial Numbers section. If you have a Safe Activation Service 2 or 3 account, Search and Groups are on different pages.

Type `MyProduct` into the Group1 field to indicate that group of Serial Numbers will be assigned to that product name.

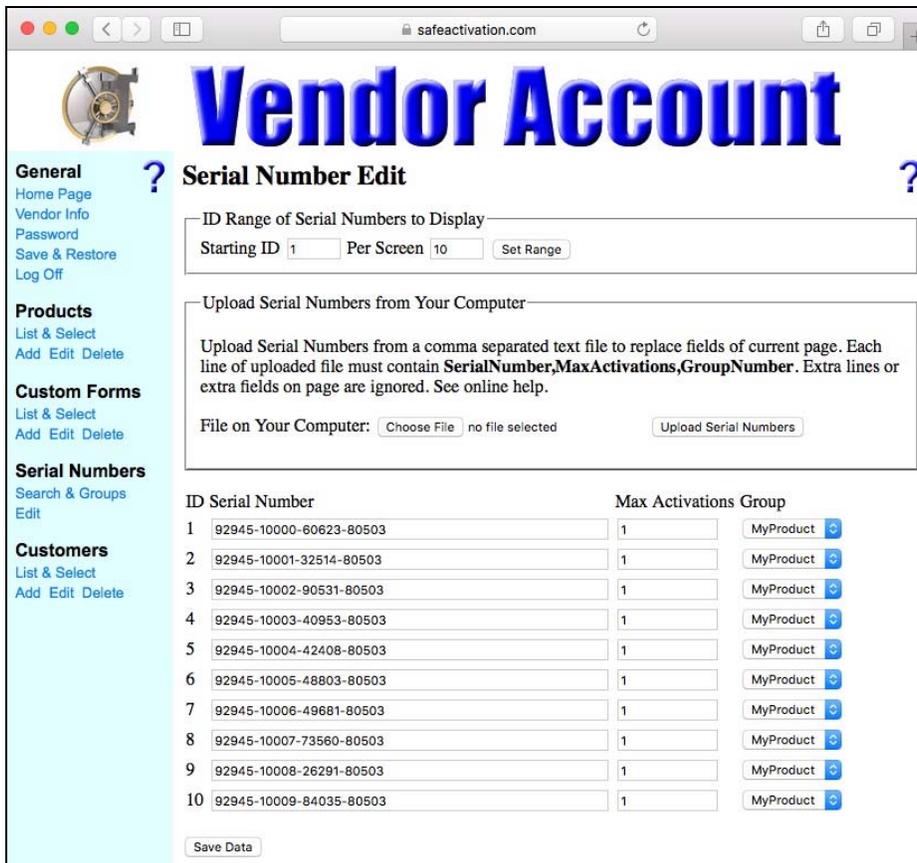
Generate Serial Numbers

Locate the Generate Range of Serial Numbers By ID Number section. To generate a batch of 100 Serial Numbers, enter 1 into the From ID and 100 into the To ID. Select `MyProduct` as the Group to which these Serial Numbers will be assigned and enter 1 into the Max Activation field to indicate that only 1 computer can be activated with each Serial Number.

Click the **Generate** button to generate the batch of Serial Numbers.

Serial Number Edit

Click the **Edit** link in the Serial Numbers section. Notice that Serial Numbers have been generated and assigned to the designated group with 1 in the Max Activations field.



The screenshot shows the 'Vendor Account' interface for 'Serial Number Edit'. The page has a sidebar on the left with navigation links: General (Home Page, Vendor Info, Password, Save & Restore, Log Off), Products (List & Select, Add, Edit, Delete), Custom Forms (List & Select, Add, Edit, Delete), Serial Numbers (Search & Groups, Edit), and Customers (List & Select, Add, Edit, Delete). The main content area includes a form for 'ID Range of Serial Numbers to Display' with 'Starting ID' set to 1 and 'Per Screen' set to 10. Below this is an 'Upload Serial Numbers from Your Computer' section with instructions and a 'Choose File' button. The main table displays 10 rows of serial numbers, each with a 'Max Activations' field set to 1 and a 'Group' dropdown menu set to 'MyProduct'. A 'Save Data' button is located at the bottom of the table.

ID	Serial Number	Max Activations	Group
1	92945-10000-60623-80503	1	MyProduct
2	92945-10001-32514-80503	1	MyProduct
3	92945-10002-90531-80503	1	MyProduct
4	92945-10003-40953-80503	1	MyProduct
5	92945-10004-42408-80503	1	MyProduct
6	92945-10005-48803-80503	1	MyProduct
7	92945-10006-49681-80503	1	MyProduct
8	92945-10007-73560-80503	1	MyProduct
9	92945-10008-26291-80503	1	MyProduct
10	92945-10009-84035-80503	1	MyProduct

Serial Numbers Assigned to MyProduct

Product Edit

Click the **Add** link in the Products section to present the Product Edit page. Enter any name into the Product Name field. Enter `P` into the Activation Calc field to indicate that a unique password will be generated for the protected application. Enter the Seed value into the Ticket Code field. The Seed value comes from the Password panel of the Options dialog in DocProtect used to build the protected application.

Define Activation Page for Protected Product

Select the appropriate Serial Number Group and `TinyForm` as the Activation Form to be used. Set the `Enable Activation` and `Serial Number Required` checkboxes. If you want to receive an email message when a product activation occurs, set the `Email Activation Data` checkbox. Finally, click the **Save Data** button and your information is stored.

Your activation web page is instantly available online.

Activation Page

Your activation web page can now be linked to your protected application. The URL is displayed on the screen.

You may have noticed the big blue **?** on many of the Safe Activation pages. If you click this, help information is presented.

The general format for an activation page URL is:

`http://www.safeactivation.com/activate.php?db=X&vendor=Y&product=Z`

To determine your specific URL, you'll replace X with 1, 2 or 3 (Safe Activation Service 1, 2 or 3), Y with your 8-digit vendor ID from your Vendor Info page and Z with an integer value from the ID column of your Product List page.

Enter this URL into a web browser and your activation page is presented.



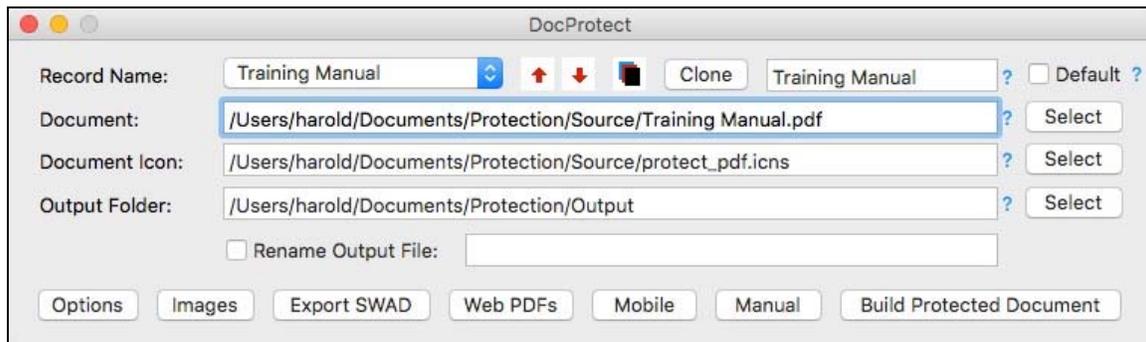
Activation Request Page Presented by Web Browser

Your Activation page is fully functional. If you enter a Password Number in the Request Number field and a valid Serial Number in the edit field, the **Send** button will return an Activation Code (computer unique password) in the browser window.

Most users will not use this page directly. They simply enter a Serial Number into a dialog when prompted on first product launch. If the computer does not have Internet access, the user is prompted for a computer unique password. That password can be retrieved from any computer using the web page shown above.

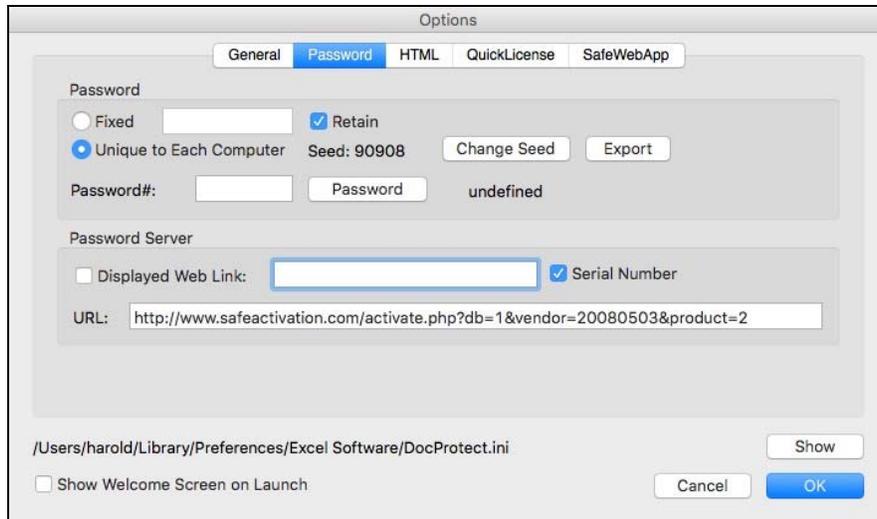
Link Product to Activation Page

Enter a path to your source document and to the output folder where the protected application will be generated. You can select an icon file that gets applied to the generated application.



Protect Document with DocProtect

To link your protected product to the activation page, click the **Options** button and select the Password panel of the Options dialog.



Connect Protected Application to Safe Activation

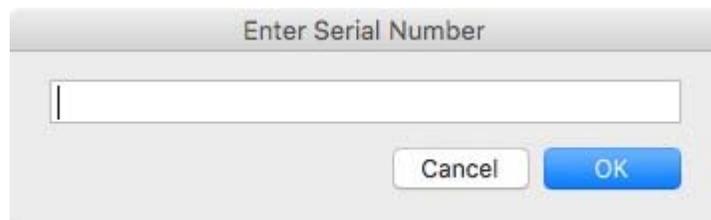
Enter the URL of your automate activation web page and set the Serial Number checkbox in the Password section. Set the `Retain` checkbox and `Unique to Each Computer` radio button.

Save changes made in the Options dialog and click the **Build Protected Document** button in the main DocProtect window.

Activate Application

Double-click the protected application. On first launch, the Enter Serial Number dialog is presented.

To activate the product, a customer will type the Serial Number provided by the vendor during the purchase process.



Summary

This paper demonstrates how to protect a document and configure an activation server to automate the activation process on a customer computer. During the purchase process, the vendor gives each customer a download link or CD with the protected application and a Serial Number that controls how many computers the application can be activated on.

To learn more about DocProtect, Safe Activation and other software protection and license management tools, visit www.excelsoftware.com.