Casper User Manual

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PART 5: CASPER eTRANSFER

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Chapter 1: Overview of eTransfer

With the power of eTransfer and the Internet you can relocate your software licenses.

eTransfer is an exciting new feature which allows you to reallocate your CrypKey-protected software licenses to another computer/host using only Internet access. With eTransfer you no longer need to depend on network connections or storage devices in order to move a license from one computer to another.

In this Chapter

In this chapter you will find information on:

- eTransfer functionality
- eTransfer menus
- prerequisites

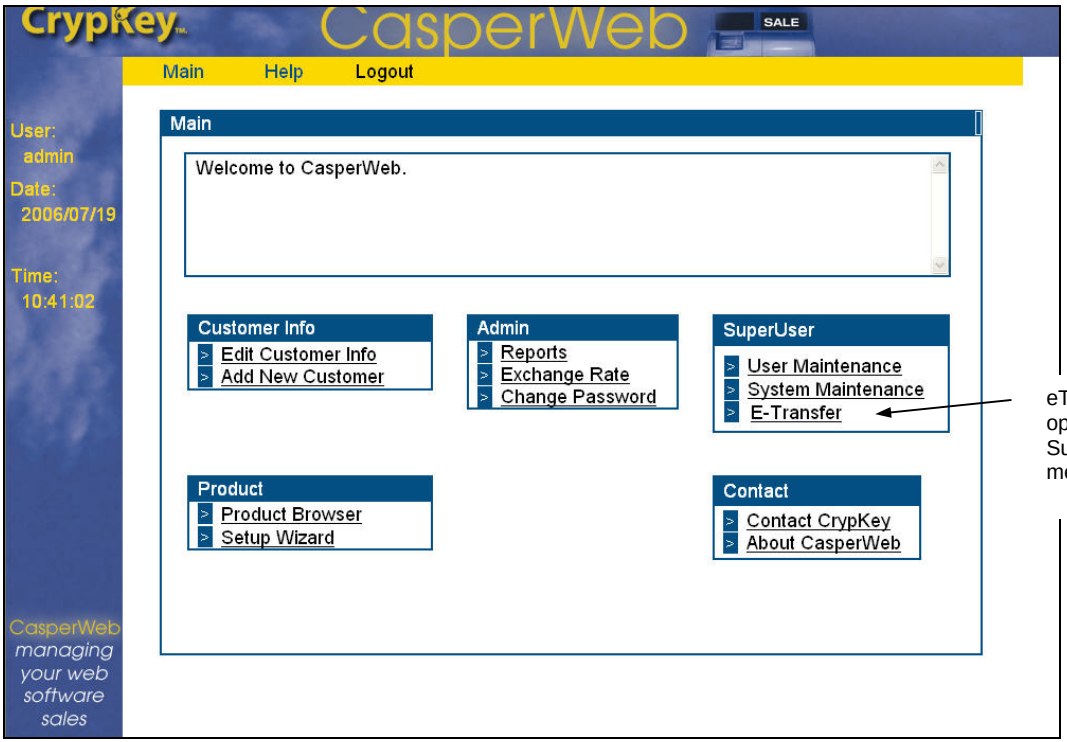


Figure 1-1 CasperWeb Main menu

eTransfer Functionality

The basic functionality of Casper eTransfer allows your customer to transfer a software license to the Casper server (check it in), then transfer the license from the server to the recipient computer (check it out).

Using the CasperWeb eTransfer option and either CrypKey Instant or CrypKey SDK, you can carry out the following tasks:

- check in a license for CrypKey-protected software, to the Casper server
- hold the license at the server as long as needed
- check the license out of the Server to another computer
- verify the status of the license in CasperWeb (click on the eTransfer menu)

eTransfer Menus

The eTransfer link is available from the CasperWeb Main Menu/SuperUser submenu. (For more information on the other options in the SuperUser menu, please refer to *Part 2: eRegister*).

eTransfer consists of the following screens (Note: The function for each screen is also shown):

Table 1-1: Screens and Function Buttons in Casper eTransfer

eTransfer Screen/Button	Function
eTransfer License screen	Lists the status of all licenses.
AutoBackup Settings Restore	Allows you to set how often you would like to back up the eTransfer information and where you would like to back it up to. It also allows you to restore the information from a location. Please note the restore removes all current information and populates with the restored information.
Prev	Goes to the previous page of license statuses.
Next	Advances to next page of license statuses.
Details	Goes to eTransfer Main screen.
Back	Returns you to the Main menu.
eTransfer Maintenance screen	Shows the details of a particular license transfer.
History	Shows transfer records with time stamps.
Forced to checked in	Resets a license to a checked in state if the customer has made some sort of error.
Forced to checked out	Invalidates the checked in license
Reset password	Resets the password

Prerequisites

In order to use eTransfer you will need:

- an Internet connection
- Your CrypKey-protected software installed on the computer which will receive the transfer

Chapter 2: Using eTransfer

eTransfer allows you to transfer your protected software licenses electronically.

eTransfer works by allowing you to upload a software license to your Casper server (check it in), then download it to another computer with Internet connection (check it out).

In this Chapter

In this chapter you will find information on:

- How to transfer a software license to another computer

Procedure – Transfer a License over the Internet

ENABLE THE ETRANSFER FUNCTION

Before you can transfer a license electronically, you must enable the eTransfer function through either CrypKey Instant or CrypKey SDK. Please refer to the these CrypKey manuals for more detail.

1. Run CrypKey Instant.

   Note: Do NOT press the Enter key on the initial CrypKey Instant window. That action is for configuring the Instant license.

2. The CrypKey Instant interface appears. Click on the Casper tab.
3. Check the **Enable eTransfer electronic license transfer** box.
4. Click **Begin Protection**.

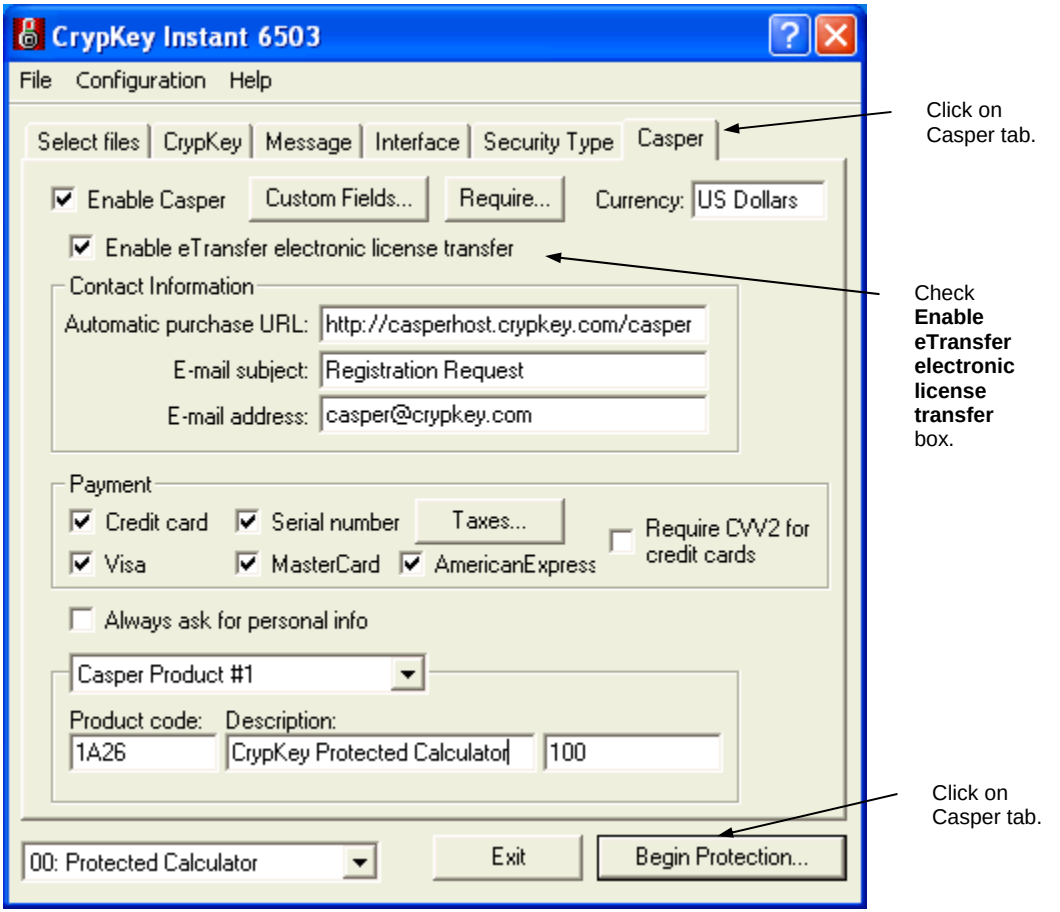


Figure 2-1 Enable eTransfer tab – CrypKey Instant

Note: For CrypKey SDK, you need to program the software with a function call to use eTransfer.

CHECK THE STATUS OF TRANSFERRED LICENSES

1. Go to the CasperWeb Main Menu (see *Part 2: eRegister* of this manual for log on instructions).
2. From the System Administration menu, select the eTransfer link:

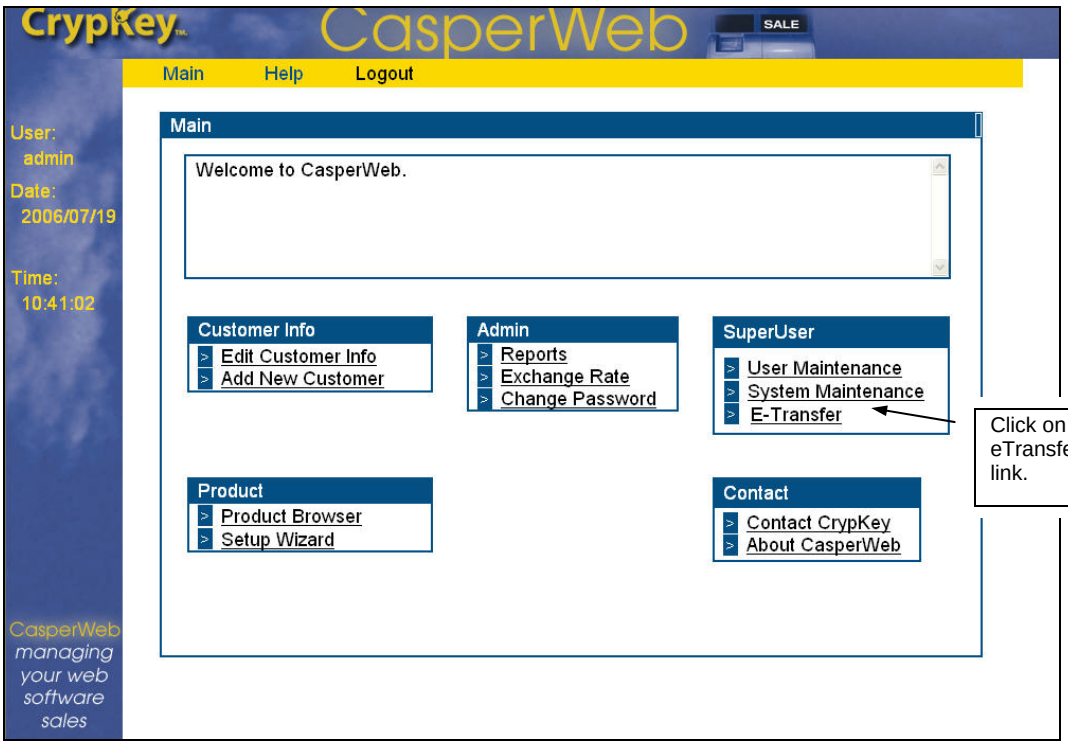


Figure 2-2 Select eTransfer menu

3. The eTransfer menu is displayed. In the example below there is no history of eTransfer transactions.

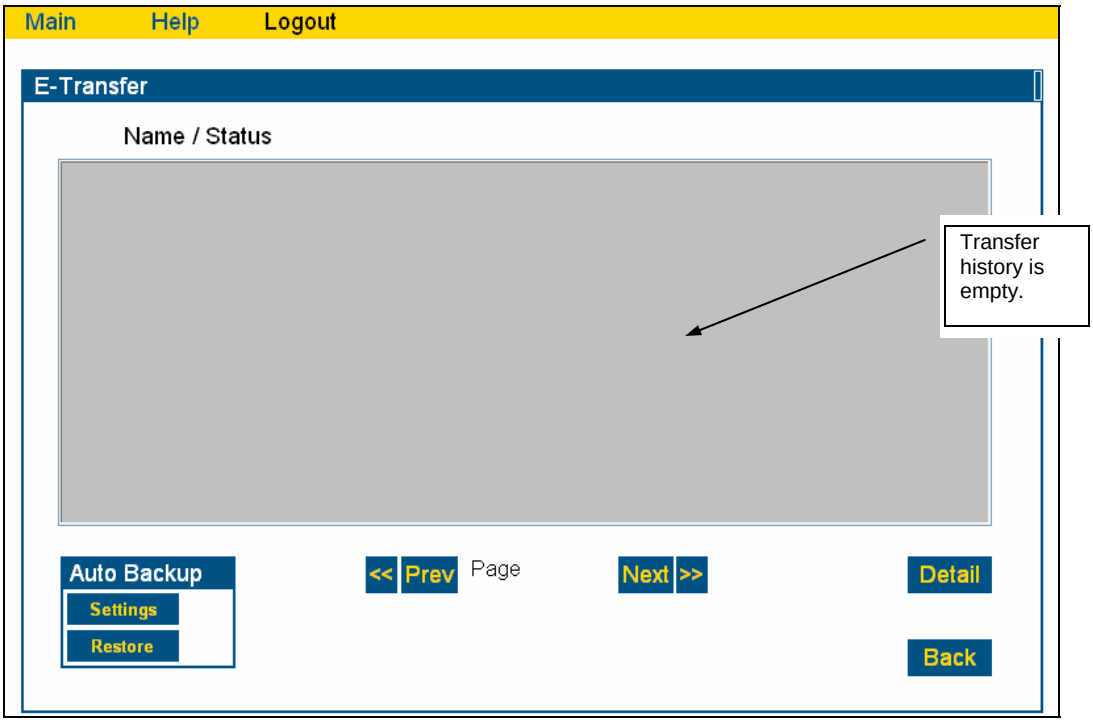


Figure 2-3 eTransfer screen – no transactions listed

4. Once you have completed a transfer, it will be listed in the eTransfer screen (along with any other completed transfers). You can then click **Details** and the eTransfer Maintenance screen is displayed (see Figure 2-9 eTransfer – Maintenance screen).

CHECK A LICENSE IN

Now you've enabled the eTransfer function, you can begin the transfer procedure.

1. Run your CrypKey-protected software. (In our example, we've used Protected Calculator).

   Note: The software must have been previously authorized. For more details, see *Part 1: Setting up Casper*.

2. If the program is authorized with Instant, press the Enter key on your keyboard when you see the splash screen. This will take you to a License Configuration screen.

3. From the License menu on your protected program's menu bar, select **eCheck License in.** The eTransfer License dialog box pops up:

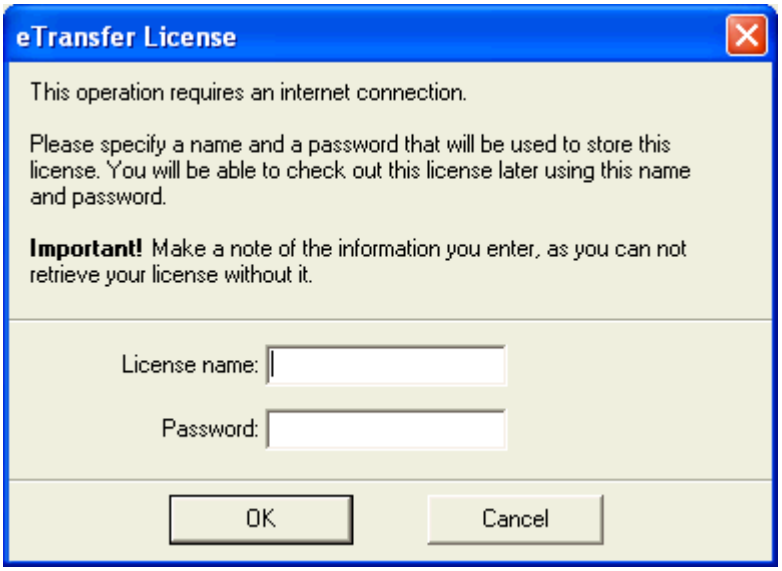


Figure 2-4 eTransfer License dialog box

4. Enter a license name and password (both must be alphanumeric without symbols).

IMPORTANT: Make a note of this information as you will not be able to retrieve the license without it.

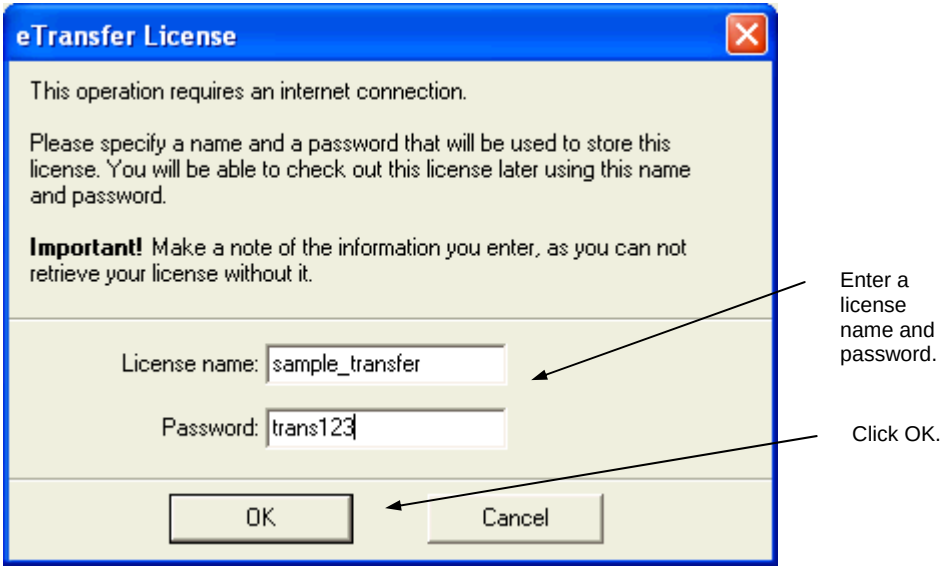


Figure 2-5 eTransfer license check in

5. Click **OK**. eTransfer checks the license into your Casper server.

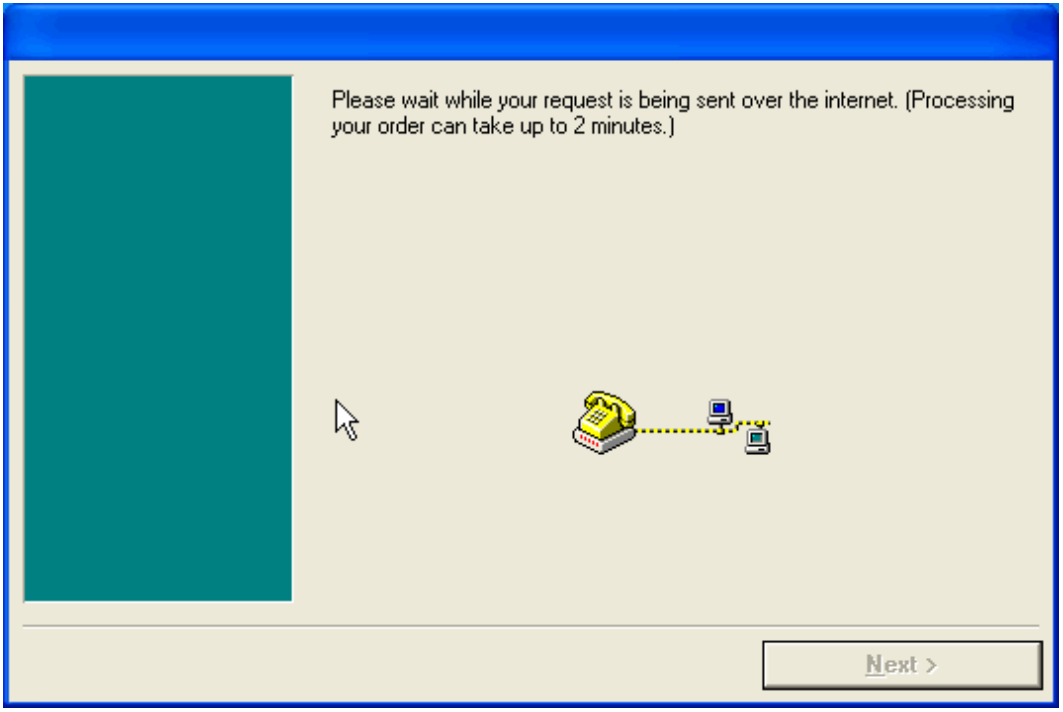
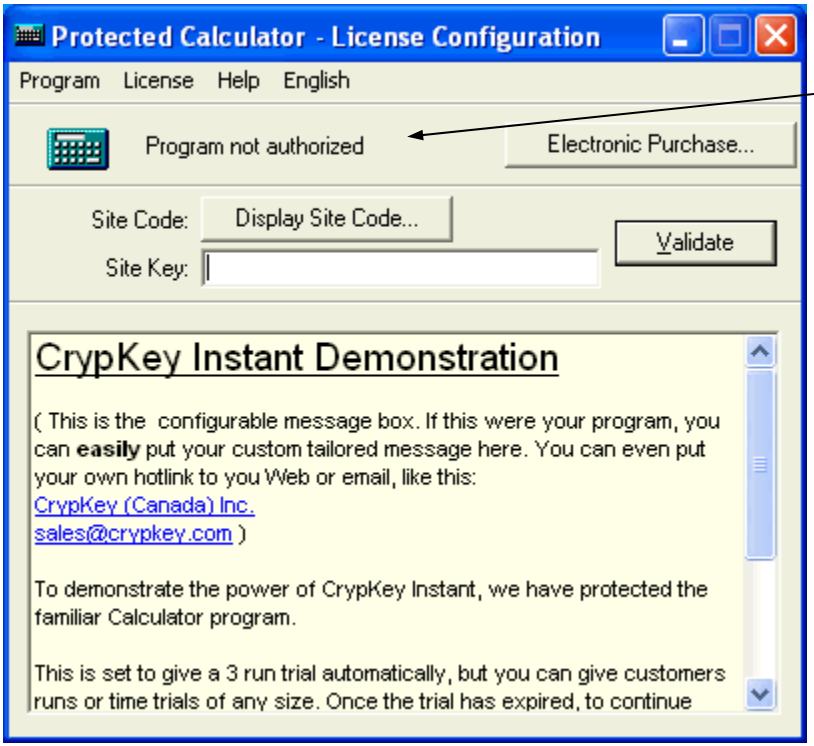


Figure 2-6 Check license in to Server message

6. Your software will now show “Program not authorized” because you have removed its authorized software license:



Once the license is checked out, the software is no longer authorized for use on the host computer.

Figure 2-7 Protected software – license not authorized

7. Look at the eTransfer screen: you will see the checked in license listed, with a designation of “in”.

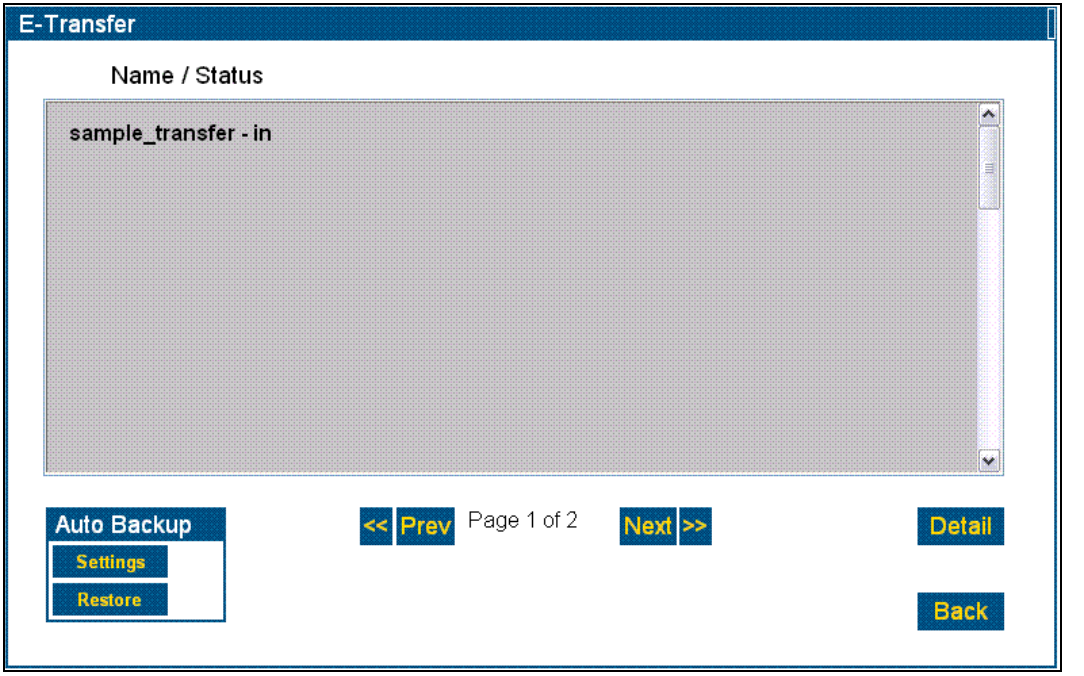


Figure 2-8 eTransfer – license checked in

8. If there are multiple pages, click **Prev** or **Next**. Click **Back** to return to the previous screen.
9. Now you can view the details of the checked in license. Click on the license name in the list, then click on **Detail**. The eTransfer Maintenance screen is displayed:

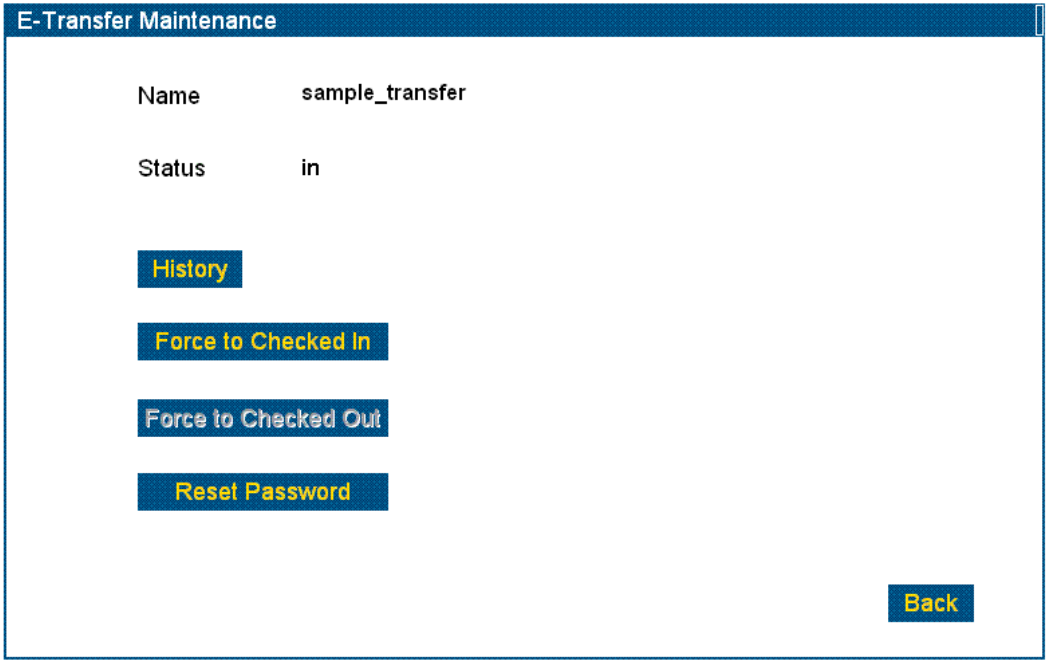


Figure 2-9 eTransfer – Maintenance screen

10. Click **Force to Checked In** to reset a license to a checked in state if the customer has made some sort of error. The message “Status forced to IN” will be displayed at the bottom of this screen.
11. The **Forced to Checked Out** invalidates the checked in license. The message “Status forced to OUT” will be displayed at the bottom of this screen.
12. Click **Reset password** to reset the password.

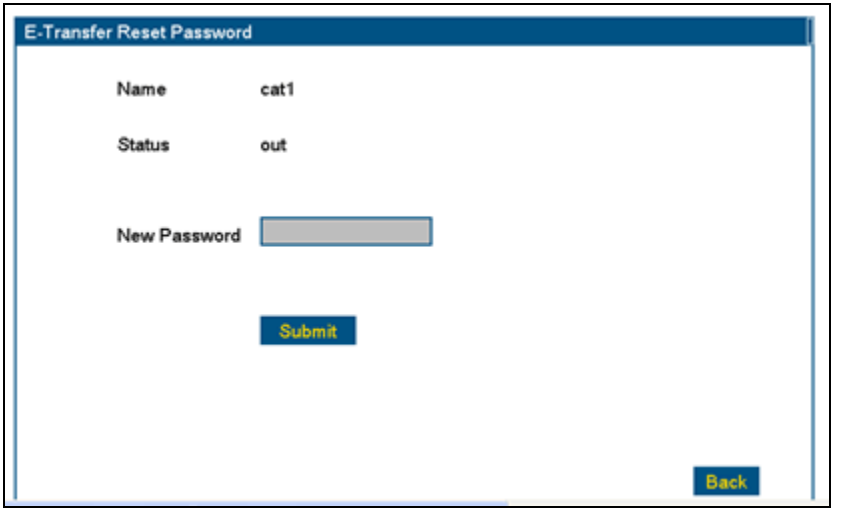


Figure 2-10 eTransfer – Reset Pasword screen

13. Click **History** to view the status history for the license (see Figure 2-15 eTransfer history).

CHECK A LICENSE OUT

The next step is to check the license out of the Server, so you can transfer it to another computer.

1. Access the computer that will receive the license. (This can also be done at a remote location by another party.)

   Note: The recipient computer must have your CrypKey-protected software installed.

2. Run the CrypKey-protected software.
3. From the License menu, choose **eCheck license out… :**

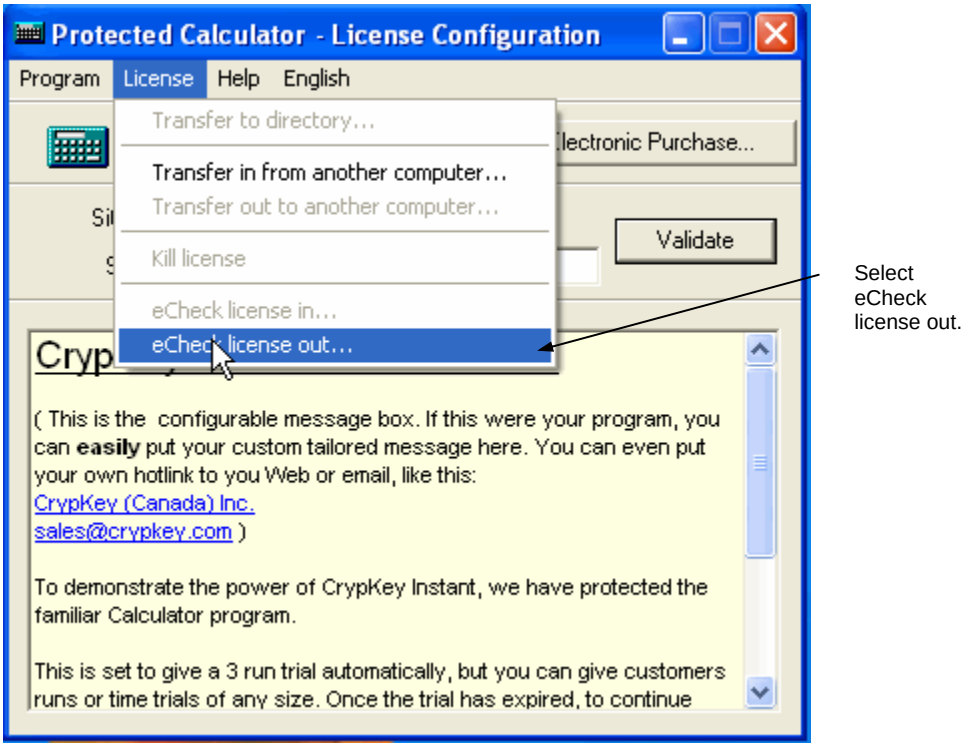


Figure 2-11 Check the license out using protected program

4. The eTransfer License screen is displayed. Enter the same license name and password you used to check the license in:

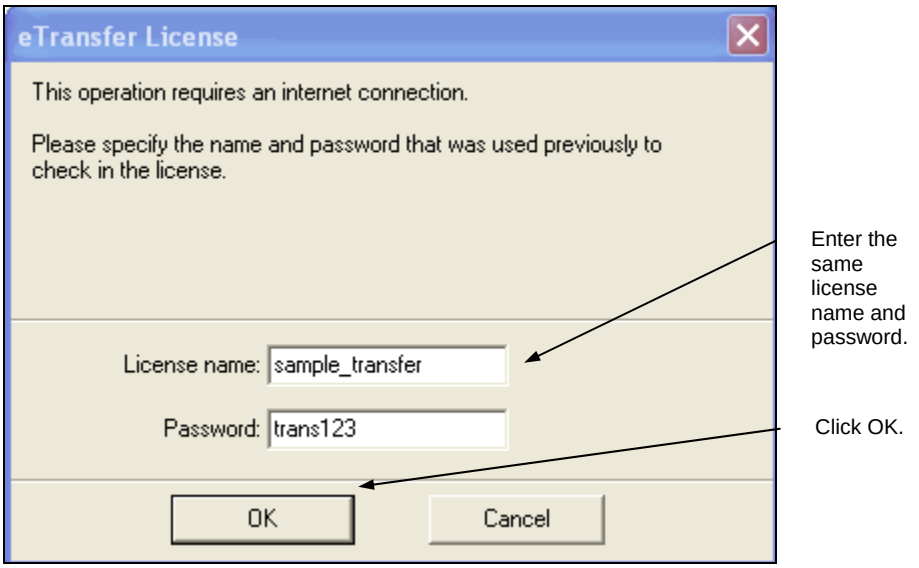


Figure 2-12 eTransfer license check out

5. Click **OK**.
6. Go to the CasperWeb eTransfer screen. Refresh the screen. The license is now listed with a designation of "out".

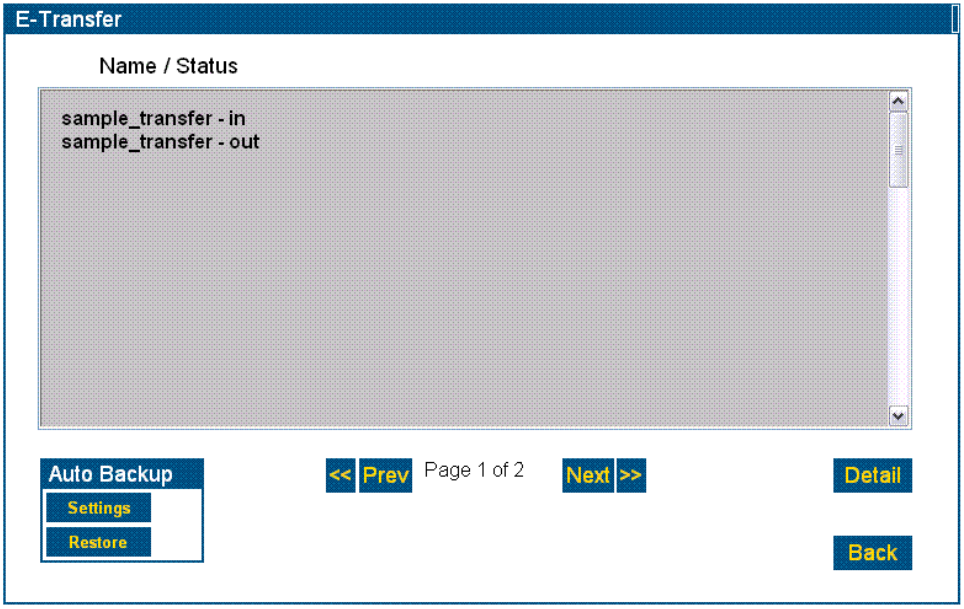


Figure 2-13 eTransfer screen – license checked out

7. Click on the license name and **Detail**. The e-Transfer Maintenance screen is displayed:

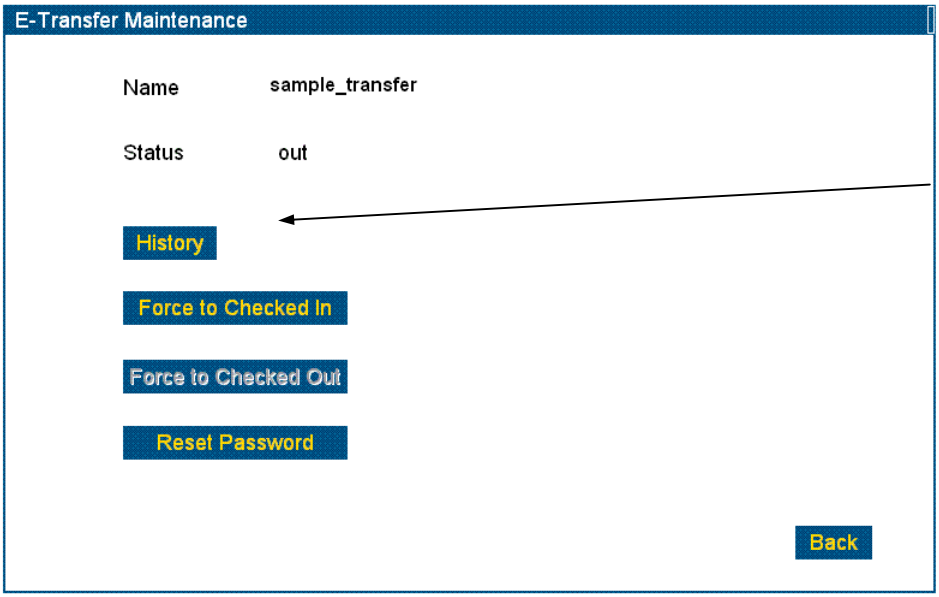


Figure 2-14 eTransfer Maintenance screen – license out detail

8. Click **History** for a log of previous activity for this license:

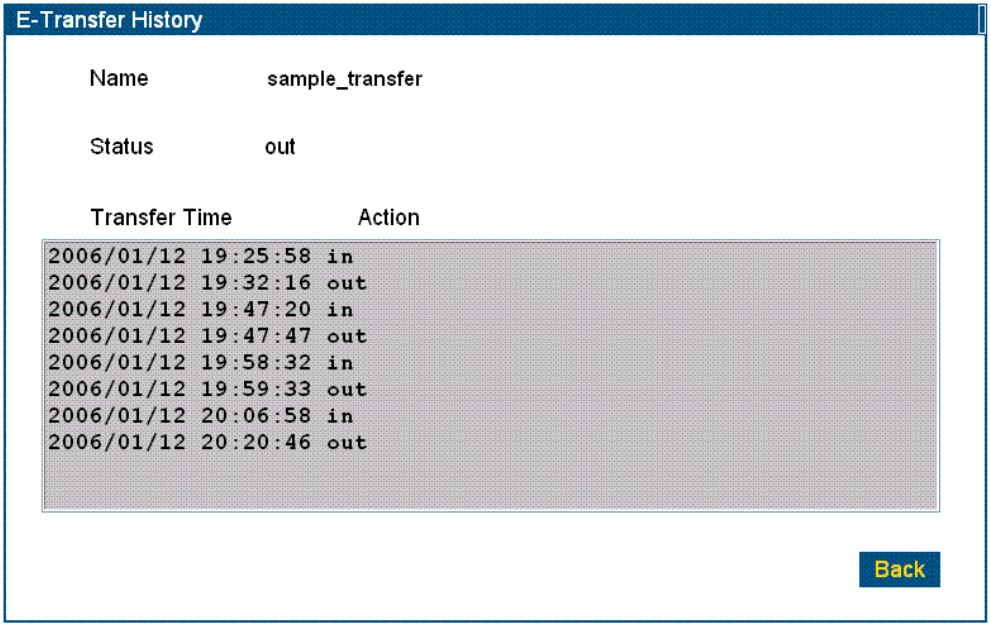


Figure 2-15 eTransfer history

9. The eTransfer is complete and the software is authorized for use on the designated computer:

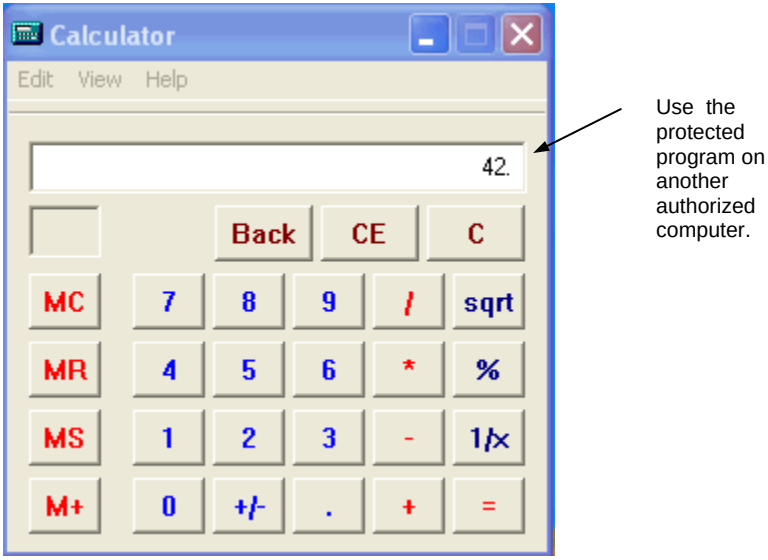


Figure 2-16 License checked out – authorized on new computer

AUTO BACK-UPS

To perform a back-up of the transfer data:

1. Go to the main e-Transfer screen.

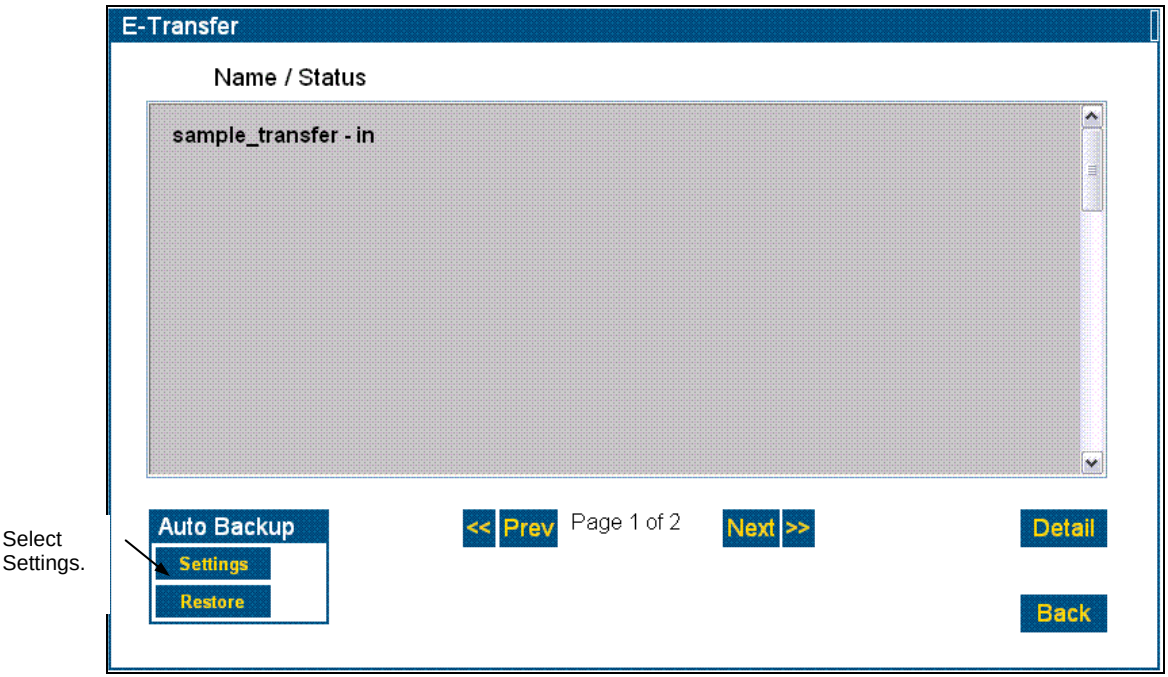


Figure 2-17 eTransfer Auto Backup Utility

2. In the Auto Backup menu, click on **Settings**:

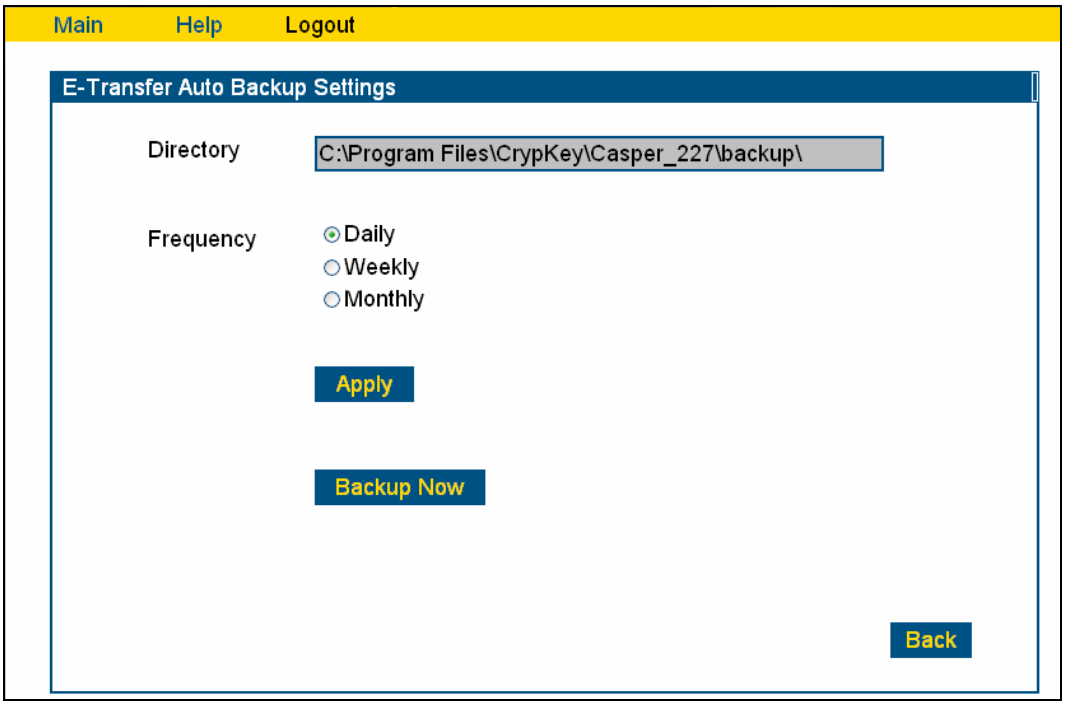


Figure 2-18 eTransfer Auto Backup Settings screen

3. Specify the directory the eTRansfer data will be backed up to.
4. Specify the frequency (daily, weekly, monthly).
5. Click **Apply** to save the settings.
6. Click **Backup Now** to do an immediate backup.

Note: Please be aware that this overwrites any current information.

7. To restore all eTransfer data to its previous state (as of the last back-up), click on **Restore** from the eTransfer main menu (see Figure 2-17 eTransfer Auto Backup Utility). The eTransfer Restore screen is displayed:

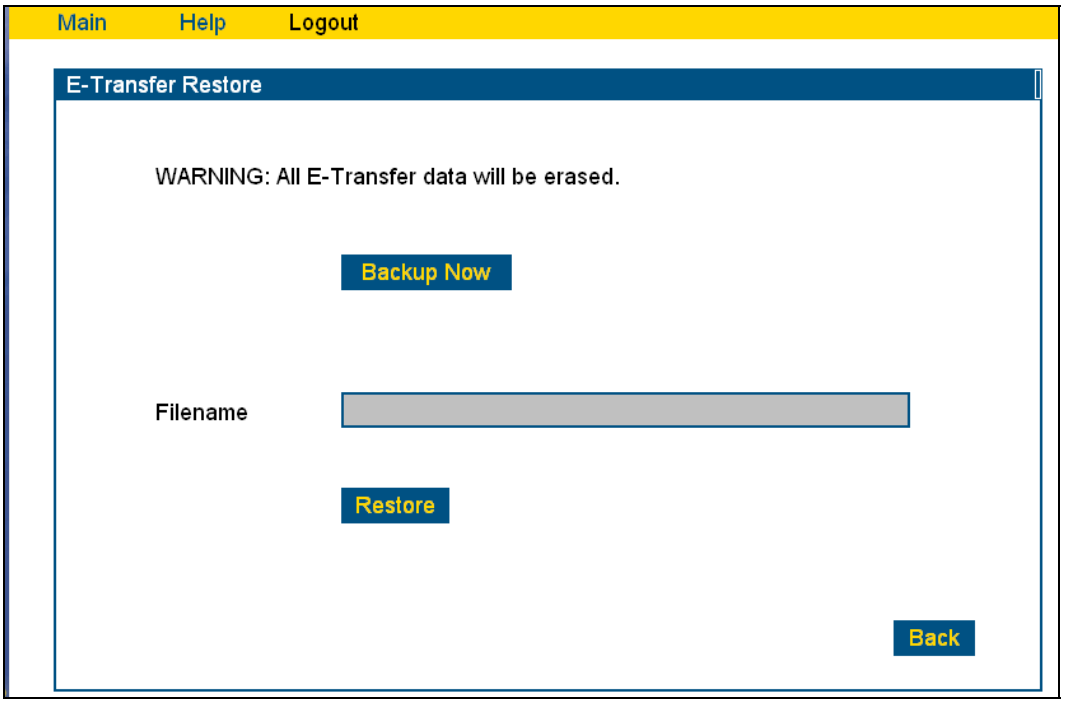


Figure 2-19 eTransfer Data Restore screen

8. To back up eTransfer data before restoring it, enter a Filename and click **Backup Now**:

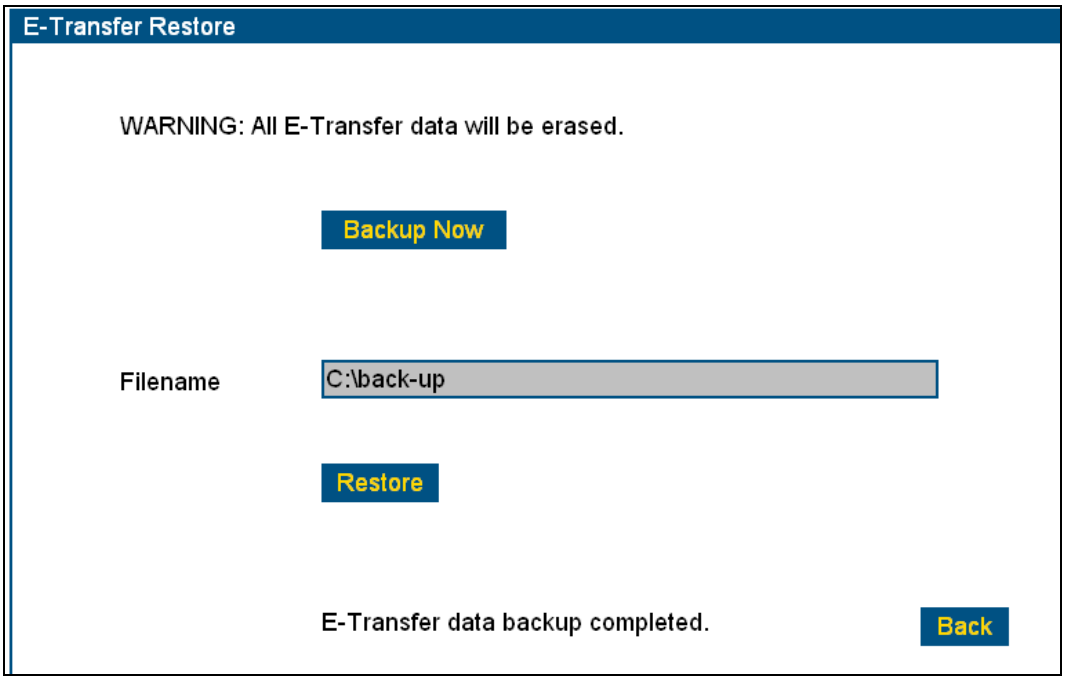


Figure 2-20 eTransfer Back-up

9. To restore all eTransfer data to its previous state, click **Restore**. If you have used the back-up option first, no current data will be lost.

IMPORTANT

Note: eTransfer will restore all data to the last known back-up date; any information added since then will be erased.

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