



WHITE PAPER

Date: **JAN 2013 (updated November 2018)**
Number: **WP01132013**
Author: **MRC**
Product: **W.I.S.H., Case Journals, Visual Grasp Accounting Software, VG-CRM**
Versions: **All Current versions**
Subject: **Upgrading from previous annual version, licensing your product, obtaining and applying your new license keys**

Contents

INTRODUCTION	2
DOWNLOADING THE INSTALLATION FILE	3
INSTALLING THE PROGRAM	7
<i>UPDATING AN EXISTING INSTALLATION</i>	8
PRODUCT LICENSING	8
<i>LICENSE KEY METHOD</i>	9
<i>WSDL LICENSE SCREEN (WSDL Method)</i>	14
QUESTIONS?	16

INTRODUCTION

This document will show you how to download and license your product. Some products require that license keys be installed when you install the program for the first time or when you upgrade to a newer version.

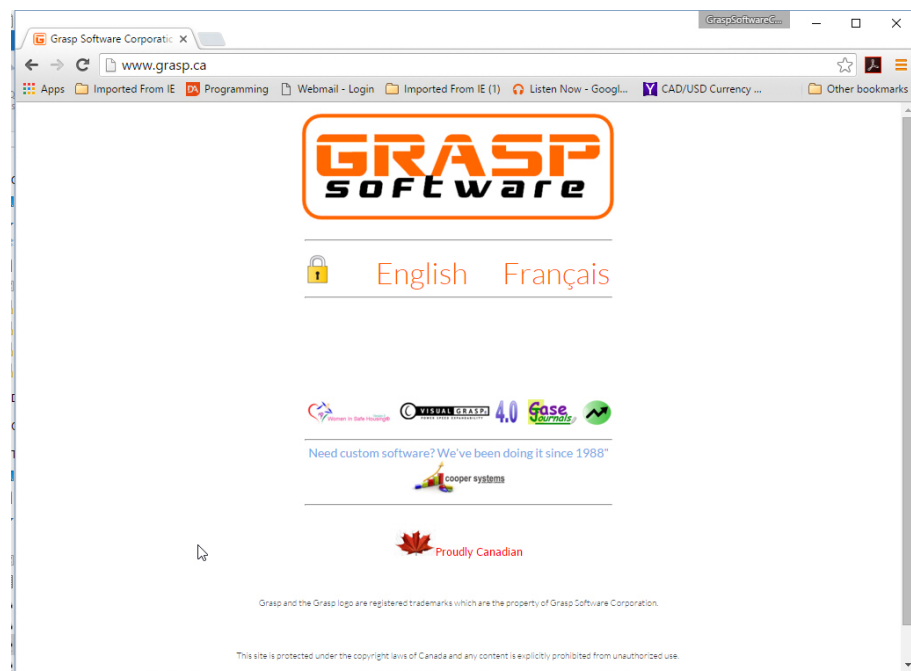
IMPORTANT: This document is a generic document covering a procedure that is similar for most of our products. For this reason the screens may look slightly different depending on the version and product that you are licensing. While the screens may differ slightly, the process is essentially the same. If you have any questions or difficulty, contact our support department at 1-877-759-6783 or support@grasp.ca.

DOWNLOADING THE INSTALLATION FILE

When you are installing the program for the first time or when you are advised that there is an updated version of the program that you want to install the FIRST STEP is to obtain the installation file from the grasp.ca corporate website.

To be able to do this, you will need your company's/organization's customer login code and corresponding password. These are generally printed on any invoice that was sent to you but you can also obtain this by using the "Forgot Password" button on our corporate website. Only valid email addresses who have been set up in our system will be able to retrieve lost or forgotten passwords. Of course you can always contact us for help too.

1. Go to the website: www.grasp.ca

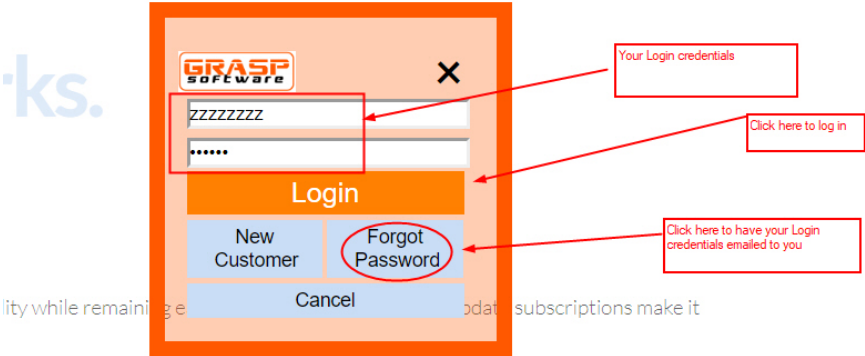


You can choose to go to either the ENGLISH or the FRENCH version of the website, we will continue to the ENGLISH website.

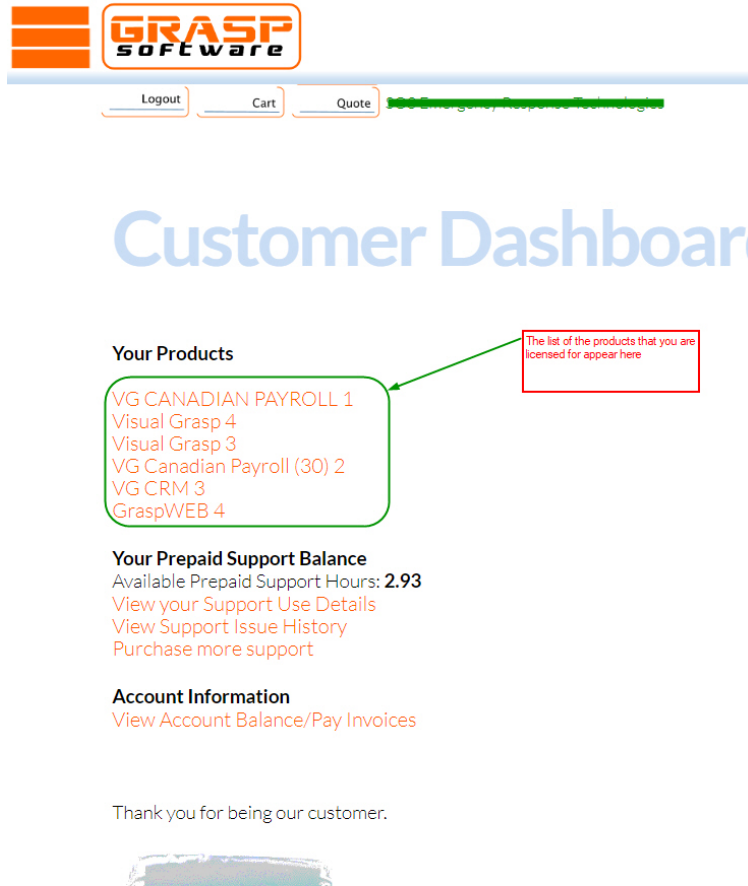
This is what the top of the website looks like. Click on the Login button to proceed.



After clicking the Login button, the Login window will pop up. If you have your Login Credentials, enter them here and click on the Login button. If you have forgotten or don't know your Login Credentials click on the Forgot Password button to have them sent to your email address.



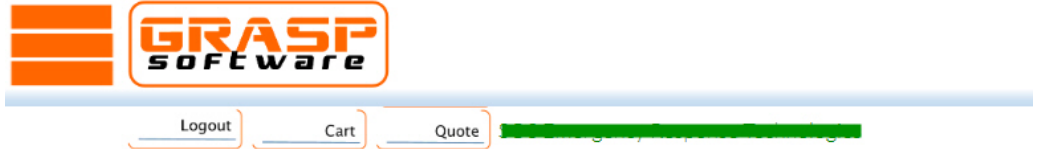
Once you have Logged in to the site with your Customer Code and Password,
The Customer Dashboard appears:



The Dashboard shows a list of the products that you are currently licensed for.
Select the Product that you want to download.


The following screen will show. On this screen you can:


- View Version and Licensing information
- Download the product
- Unlock a license that has been locked, and/or have a license key file sent to you for older versions that do not use the “WSDL” licensing method.
- Obtain PDF versions of the current manual(s) for the product.
- View Revision History





License Listing


12540

 **Visual Grasp**
Licenses: 5
Installed Ver: 4.7
Download Ver: 4.7.01d

 UNLOCK LICENSE and EMAIL UNLOCK CONFIRMATION
to:

 DOWNLOAD
(Alternate download server)

 **MANUALS**
Visual Grasp 4 Manual ver 4.7
VG4 Optional Modules User Manual 4.7

 REVISION HISTORY

This shows your current number of licenses and the version that is available for you to download

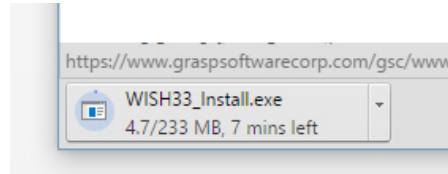
If you have been informed that your license has been locked and need to reset your license (for example, you've moved the program to a new server), use this option to unlock your license.
Some older versions will send you a special License Key file by email to license your product.

Click here to Download the installation file.

This section includes links to the current versions of the manual(s) for your version of the program.

Clicking on the **DOWNLOAD** link will begin to download the installation file to your computer. If you are given the choice to **Save** or **Run**, **ALWAYS PICK SAVE**. The file is very large and the installation will be excruciatingly slow if you try to run it over the internet.

Depending on which “browser” you use, you should be able to identify where the download file is and how to run it. For example, we have used Google Chrome in writing this document, so the screen in Google Chrome looked this this in the bottom corner:



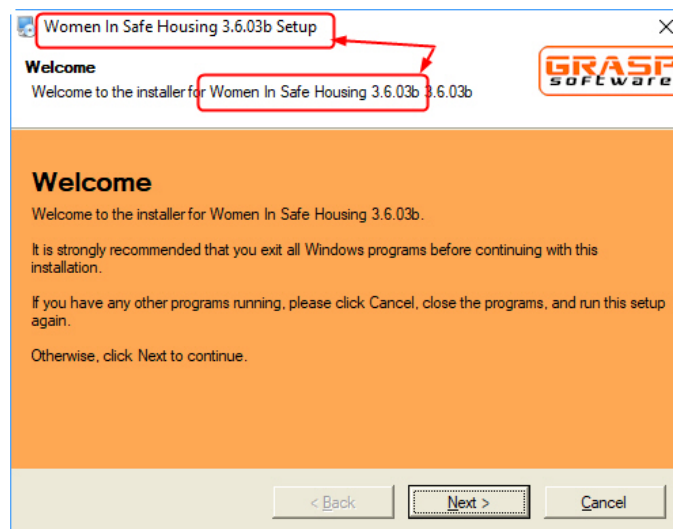
The name of the file being downloaded differs from version to version and from product to product, so be aware of the name of the file and the location to where your browser save it to.

INSTALLING THE PROGRAM

Once downloaded, simply run the installation file by double clicking on it and you are **HIGHLY ADVISED** to accept all of the defaults for the choices in the installation process. Only under very unlikely situations should you need (or want) to change the installation choices.

We won't cover the process here, but basically proceed through the Installation accepting ALL of the default choices.

The Program Installation screen will look slightly different for different products, but they all show the Product Name and Version Number in the screens, like this:



In addition, depending on your version of Windows and the security settings of your computer, you may be required to log in as a user with “administrative” rights and may also need to confirm that you do intend to install this program before the installation screen (shown above) appears.

If you are installing the program for the very first time, you will need to run this program on every workstation that is to have the program AND THE SERVER WHERE THE DATA WILL BE LOCATED.

If you have any questions, or any difficulties, you can contact our support team at 1-877-759-6783 or support@grasp.ca.

UPDATING AN EXISTING INSTALLATION

If you are updating the PROGRAM in an environment that has already been running the program, you will most likely simply need to run this PROGRAM INSTALLATION file on one computer. Most of our products are designed to “push” the update out to other workstations when an updated version of the program has been installed to one of the workstations on the network.

IMPORTANT

When updating the W.I.S.H. (Women In Safe Housing) product ALWAYS be certain to run the update on the server where the data is located. The W.I.S.H. product often has a server side component that looks after the generation of statistics which means that it is imperative that the updated version of the program also be deployed to the file server.

PRODUCT LICENSING

When installing a Product for the first time or when upgrading a product to a newer major version (ie 3.2.xx to 3.3.xx), you will need to re-license your product. Also, if you are using a product that has been licensed as a “SaaS” (Software as a Service) product you will need to relicense the product when the license is about to expire.

Grasp Software products are licensed using one of two methods:

- License “Keys” **obsolete**
- WSDL method. (pronounced “Wiz-Dil”)

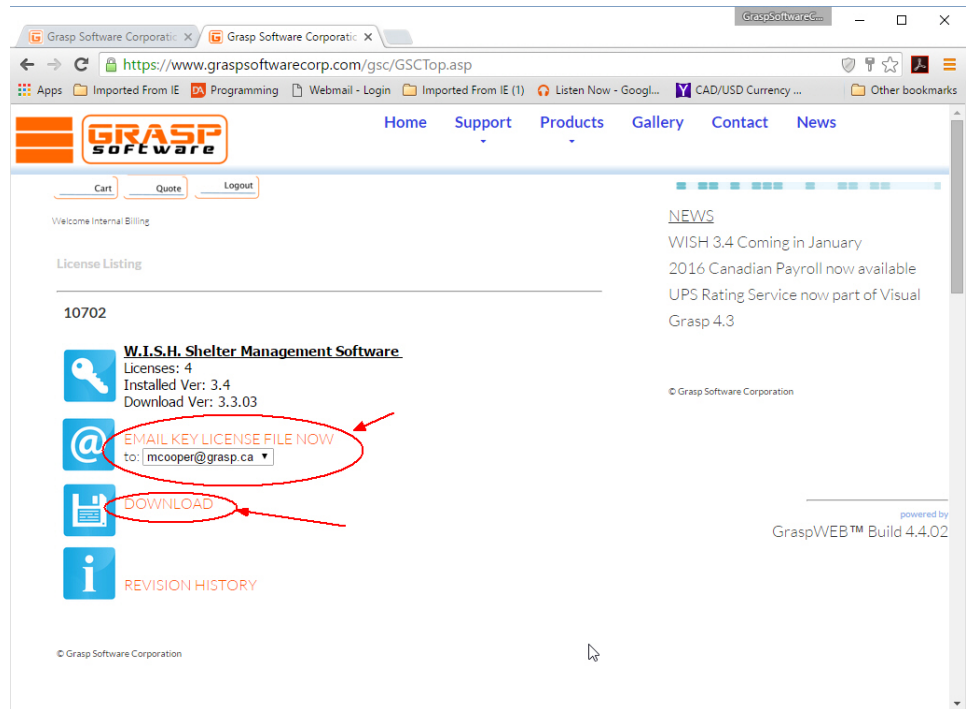
Prior to 2016, all products utilized the License Key method. Beginning with W.I.S.H. version 3.4.01 (released in January 2016), the WSDL method was added to introduce an easier method of product licensing. As of the writing of this document, the licensing methods of the products are shown in the table below:

<p>LICENSE KEY METHOD</p> <p>OBSOLETE</p>	<ul style="list-style-type: none"> • VG-CRM3 and VG-CRM/FR3 prior to version 3.4 • Visual Grasp 3.x and 4.x, prior to version 4.5.02 • VG Canadian Payroll 2.x prior to version 2.5 • Case Journals 2.x prior to version 2.4 • W.I.S.H. 2.x, 3.0.x to 3.3.x
<p>WSDL METHOD</p>	<ul style="list-style-type: none"> • VG-CRM3 and VG-CRM/FR3 3.4.x and up • Visual Grasp Version 4.5.02 and up • VG Canadian Payroll 2.5.x and up • Case Journals 2.4.x and up • W.I.S.H. 3.4.x and up

LICENSE KEY METHOD ~~OBSOLETE~~

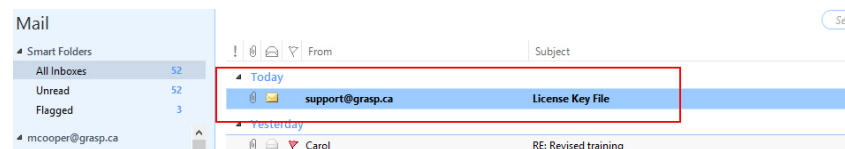
If your product uses the LICENSE KEY METHOD (consult the table above), then you will need to have the Key File emailed to you. Remember the webpage above where you got the DOWNLOAD file? This is also where you would request that the License Key File be emailed to you.

This section covers a licensing method that is obsolete and the font colour has been printed in a lighter shade to reflect that.

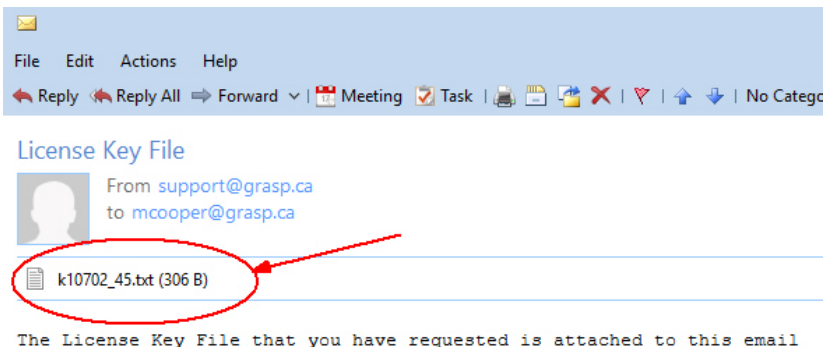


The file can be emailed to any of the email addresses that we have on file for your company/organization that we have been advised are allowed to receive the file. If the list needs to be updated to add or remove emails, you will need to contact our support team at 1-877-759-6783 or support@grasp.ca to do so.

Once the file has been emailed to you, it will show up in your email inbox as an email with an attachment.

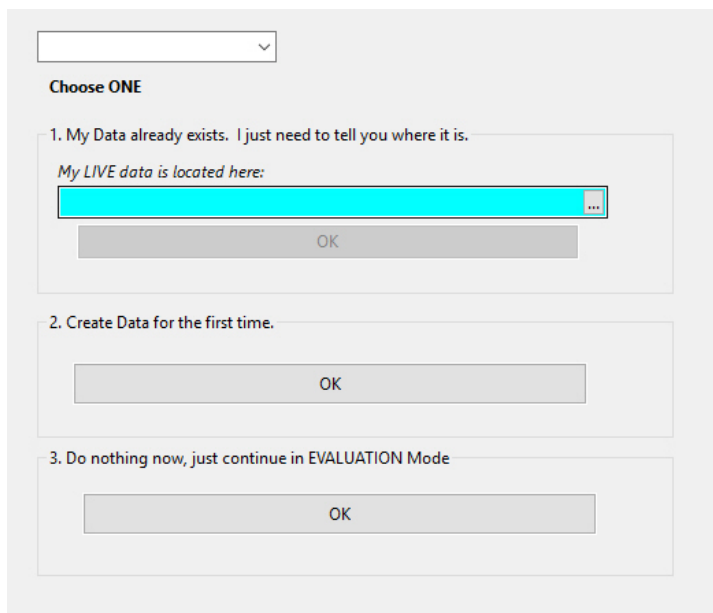


Open the email and save the attachment. Be sure to know the name of the file and the location to where you saved it to as you will need to find that file later in the process.

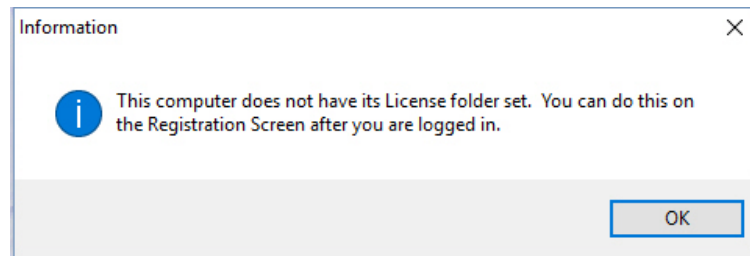


Starting the Program

Now start your newly installed program. If it is the first time that you are running the program, you may need to complete some additional steps such as locating your data location or specifying your license pool location prior to continuing. For example, on W.I.S.H. and Case Journals, that screen looks similar to this:



Visual Grasp and other programs may give you a message like this one:

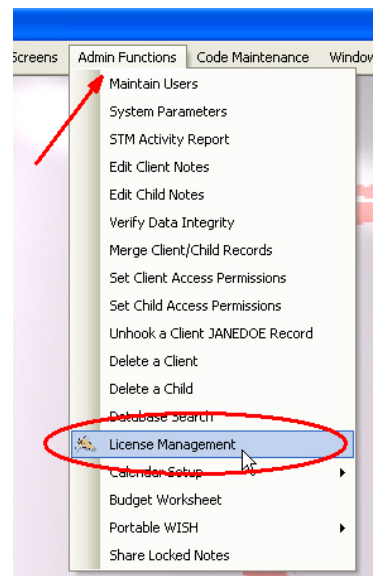


If your product has already been successfully set up, you should not receive these messages and you can proceed to the next step.

LICENSING SCREEN (License Key Method) OBSOLETE

To license the product, you will need to go to the licensing screen. If the lack of a license prevents you from opening the program, you will need to log in to the DEMO data that is distributed with your product, otherwise, open the program in the normal manner.

On some programs, you will find the License Screen through the Admin Functions menu:



Others (Visual Grasp®) will show this icon on the menu:



This section covers a licensing method that is obsolete and the font colour has been printed in a lighter shade to reflect that.

Some programs will automatically open an unlicensed product directly to the licensing screen which will look similar to this screen.

Register / Activate License

Registered To UNREGISTERED
Email Address mcooper@grasp.ca
Re-Enter Email mcooper@grasp.ca
Street/Mailing
City CASTLEGAR
Prov/State BC Postal/Zip V1N 4S2
Country CANADA

Register By
 Internet By Mail Import File (Internet Required)

P:\Work\k10702_45.txt Import

Token 01 - SN 12726
License Information
UNREGISTERED
SN 12726

License Folder
P:\WISDB\DATA\LIVE\LICENSES\

Installed Tokens
Add a Token
Delete a Token

My LIVE data is located here:
P:\WISDB\DATA\LIVE\

Do you need a Product Key? [CLICK HERE](#) or call 877-759-6783

To get a Key File emailed to you, log into www.grasp.ca with your buyers account and under Customer Service, go to License Manager

To license a product using the LICENSE KEY FILE METHOD:

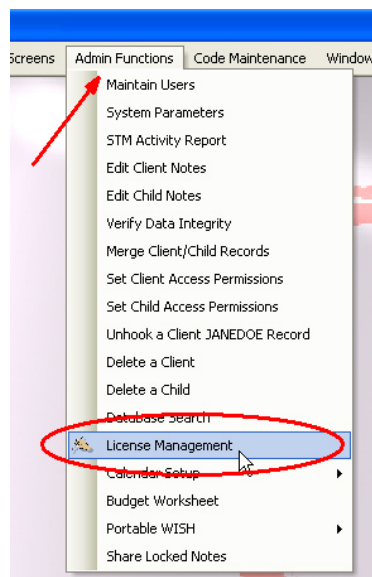
1. Fill in the fields shown in the upper left, including:
 - a. YOUR Email address (twice),
 - b. YOUR City,
 - c. YOUR Province/State
 - d. YOUR Country
 - e. Zip/Postal Code
2. Select **Import File (Internet Required)** option in the *Register By* section.
3. In the field below, browse or type in the path to the LICENSE KEY FILE that you saved from your email in the steps above.
4. Click the **Import** button.
5. You will receive a message indicating if the file was successfully imported or if there were problems.

NOTE: All other users MUST have closed entirely out of the program or the importation of the LICENSE KEY FILE will fail.

WSDL LICENSE SCREEN (WSDL Method)

If your product uses the WSDL method to manage your licenses, the process is much simpler. The WSDL method was introduced to some of our products starting in January 2016 with W.I.S.H. 3.4.01. The WSDL method is much simpler and does not require you to obtain a License Key File. To license products that utilize this method, simply go to the License Screen within the product. An unlicensed product will open automatically to the License Screen for you.

On some programs, you will find the License Screen through the Admin Functions menu:



The License Screen on a product that used the WSDL method will look very similar to this screen shown from W.I.S.H. 3.4.0.1.

The screenshot shows a window titled "Register License". On the left, a box displays "EVALUATION MODE" with details: "SN: 0", "Licensed for 3 users", and "Currently Logged In: 1". The main area contains registration fields: "Registered To" (empty), "Email Address" (highlighted in cyan), "Re-Enter Email" (empty), "City" (empty), "Prov/State" (empty), "Country" (empty), "Postal/Zip" (empty), "Lock" (masked with asterisks), "Customer Code" (empty), and "Password" (empty). Each field has a small icon to its right: a red 'X' for empty or invalid fields, and a green checkmark for the "Lock" field. A "Register Now" button is at the bottom.

You need to fill out ALL of the fields on this screen with valid entries including the Customer Code and Password that has been assigned to your company/organization from Grasp Software Corporation. Once that you have filled out his information, all of it (except the Password) will be retained for the next time that you may need to re-license the product (a version upgrade for example). Click on the **Register Now** button and your product will be registered.

A successfully licensed product will show your current license details in the upper left corner and will remember your previous entries in this field making future re-licensing a simple matter of entering your Password.

NOTE: If your license is a "SaaS" (Software as a Service) license the SaaS Expiry date will show in addition to the License details in the upper left corner.

The screenshot shows the "Register License" window after successful registration. The left box now displays: "Licensed to: Grasp Software Corporation", "SN: 12726", "Licensed for 4 users", and "Currently Logged In: 2". The registration fields are filled: "Registered To" (empty), "Email Address" (mcooper@grasp.ca), "Re-Enter Email" (mcooper@grasp.ca), "City" (CASTLEGAR), "Prov/State" (ON), "Country" (CANADA), "Postal/Zip" (V1N 4S2), "Lock" (masked), "Customer Code" (ZZZZZZZ), and "Password" (empty). Green checkmarks are present next to all filled fields. The "Register Now" button is still at the bottom.

NOTE: When licensing via the WSDL method, all Users should be logged entirely out of the program and the license should not be entered through the DEMO data, but through your LIVE data.

QUESTIONS?

If you have any questions or encounter any problems, you are encouraged to contact our support department at 1-877-759-6783 or support@grasp.ca

CHANGES TO THIS WHITE PAPER

It is our goal to make this White Paper as “friendly” as possible even though detailing this complex and powerful feature of **W.I.S.H.**[™]. If you have any comments or suggestions that would make this White Paper even easier to read and understand, please let us know by emailing any comments to support@grasp.ca

Grasp Software Corporation does not warrant this Utility/Document or guarantee the contents of this Utility/Document or the information contained in this White Paper. Under no circumstances is Grasp Software Corporation, its employees, dealers, agents, or owners to be held liable for any damages directly or indirectly as a result of the information and utility provided in this White Paper.

GRASP® is a registered trademark of Grasp Software Corporation.

THIS CONCLUDES THIS WHITE PAPER.