



# Setup Guide

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Developed by:



[www.discoverysoftware.com](http://www.discoverysoftware.com)

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## Introduction

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Principalm+, developed by Discovery Software Ltd., is solution designed specifically for K-12 schools that allows anytime, anywhere access to student information. Using Principalm+, school staff can:

- Access student information away from the desktop, on a handheld of their choice (Palm®, Windows Mobile®, BlackBerry®) for medical emergencies, acts of nature, or other emergency situations
- Identify students/staff using photos, barcodes or RFID scanning
- Address truancy and disciplinary issues by knowing which students, belong where, at what time
- Increase safety at schools by identifying intruders and accessing data such as locker numbers, parking stalls and license plate numbers.

Principalm+ works with virtually every Student Information System (SIS) on the market, and helps school staff members respond appropriately and quickly to day-to-day situations, as well as emergencies. 'Always on' security and technology ensures that student data is available even when there is no power or wireless access.

Principalm+ is created with 128-bit encryption using the AES (advanced encryption standard) as specified by the USA government. Just like your banking information, it's as secure as you can get. Users must know the encryption password to access the information.

## System Requirements

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### Handheld Requirements:

You require a handheld running one of the following supported operating systems:

- BlackBerry® OS 4.3 or later
- Windows Mobile® Pocket PC 2003 or later
- Windows® Smartphone 5 or later
- Palm OS® 5

### Hardware Requirements:

- Any handheld touch-screen or joystick device running one of the above operating systems that has a memory card slot.
- A memory card to use with Principalm. We recommend the SD Card format
- A memory card reader that is compatible with your memory card and computer. We recommend USB 2 (for Palm® and Windows® handhelds).
- A USB sync cable (for BlackBerry® handhelds).

### Desktop Requirements:

- Microsoft Windows 2000 or later
- Mac OS X 10.2 or later (does not require Classic environment)

### Software Requirements:

- A compatible Student Information System (SIS) – see Step 2.
- A “bridge” compatible with your SIS – see Step 2.
- Principalm Connect – see Step 4.

## Installation Process Outline

Getting started with Principalm+ is very easy. You just need to follow a few steps, as outlined in the illustration below and in the Steps following:



There are 5 steps to setting up Principalm+. This page outlines these steps. The following chapters explain each step in more detail.

### **STEP 1: Check Principalm+ Requirements**

Ensure you have everything you need.

### **STEP 2: Export Student Data**

Export student data from your school information system (SIS) using software called a “bridge”.

### **STEP 3: Export Student Photos**

Ensure you have a current Photo CD provided by your photo vendor so pictures can be uploaded to your handheld.

### **STEP 4: Principalm Connect Setup**

Install the Principalm Connect program on your computer to allow you to transfer your data to your handheld.

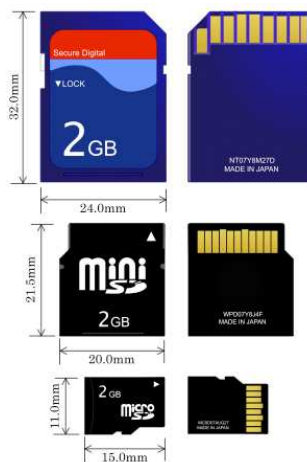
### **STEP 5: Transfer Data to Handheld**

Transfer your school data to your handheld.

## Step 1: Check Principalm+ Requirements

Required software/hardware includes:

- This Principalm+ Setup Guide.
- A Secure Digital (SD) card – with micro and mini adapters – similar to the images shown below. An SD card is like a very high capacity floppy disk. (If more than one person in your school will be using Principalm+, then you will need to buy some more SD cards; they are widely available.)



- For updating BlackBerry® devices, a BlackBerry® USB connector cable and an installation of BlackBerry® Desktop.
- For updating Palm® and Windows Mobile® devices, a card reader that attaches to the desktop computer.



Note: The actual card reader may vary in appearance from the image above.

## Step 2: Export Student Data

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In this step, you will export student data from your Student Information System (SIS) to your computer.

In order to do this, you need what is known as a “bridge.” A bridge is not a physical wire or device. It is software, and a process, that lets you export all your student data easily and quickly in the right format.

PrincipalM+ currently has bridges for over 70 different SIS products, and each requires its own bridge. Some common SIS bridges include SASIxp, PowerSchool, Infinite Campus, eSIS, STI, Aeries and WinSchool. Please see a list of supported bridges available at:

<http://www.discoverysoftware.com/support/bridges/>

### Data export steps:

1. Identify your SIS. If you aren't sure, please ask your IT department.
2. Identify the bridge that works best for your SIS. The bridge (and user guide) for your SIS can be downloaded from the link below:  
<http://www.discoverysoftware.com/support/bridges/>

If there is more than one bridge for your SIS (e.g. data extractor and/or manual extract), the data extractor is the preferred method. If your SIS is not listed, please contact our Support Team at [support@discoverysoftware.com](mailto:support@discoverysoftware.com).

3. Export your data by following the detailed instructions in your bridge's User Guide (downloadable from the URL above). Your student data will be exported into a folder either in the form of, or along with, a PrincipalM Data Export (PDE) file. The PDE file makes it possible for PrincipalM+ to read your student information, and is necessary for importing your data.

## Step 3: Export Student Photos

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Principalm+ includes a feature that lets you import student photos as well as data. If this is a feature you wish to include, please follow these steps:

### Photo export steps:

1. Access the photo CD you got from your photo vendor (i.e. Lifetouch, Herff Jones etc).
2. Follow instructions provided by your photo vendor on exporting the images in JPEG format.

To import photos into Principalm+, you need to set up a folder containing either:

- JPEG images that are named with the ID of student they represent (so student 123 would be stored inside 123.jpg or 123.jpeg), or
- JPEG images named any way you like, including a separate Index File that tells Principalm+ what image belongs to what student.

If you do not have JPEG format photos, please contact [support@discoverysoftware.com](mailto:support@discoverysoftware.com) to obtain a photo converting tool.

## Step 4: Install Principalm Connect

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Principalm Connect is software that lets you transfer all of your school data and photos to your handheld quickly and easily.

Principalm Connect installation steps:

1. **Download Principalm Connect from:**

<http://www.discoverysoftware.com/support/download/>

Tip: Install Principalm Connect on the computer you will use to transfer SIS data to your handheld. This should be the same computer on which your SD card reader/writer is installed, but does not have to be the same as the one that holds your school's SIS database or the output SIS data files for Principalm+. If you do not install Principalm Connect on the same computer where the files are located, you must have access to a Shared Network to be able to upload them to Principalm+.

2. **Care Network**

The first time Principalm Connect is run, it displays a Care Network Dialog window. The Care Network provides Internet support for Connect. We recommend that you leave both of these options selected, click "Next".

3. **Handheld lockout**

Handheld lockout causes Principalm+ to deny access to the database after a number of failed password attempts. This reduces the chance that passwords can be guessed by trial and error. Choose your actions and click "Next".

4. **Activation**

The Activation dialog is where you enter your license information for Principalm+. Licenses are entered on a per-school basis. Enter the activation key provided to you and click "Next".

5. **SIS Bridge**

The SIS Bridge screen tells Principalm Connect where to find data exported from your administration system (see Step2). Select "Use Student Information System (SIS) Data," and choose your SIS from the list. If you do not see your SIS in the list, simply scroll to the bottom, select "Other" and type your SIS name in the box that appears. Note: If you don't see your SIS name, please contact [support@discoverysoftware.com](mailto:support@discoverysoftware.com). Import your school data by clicking "Browse" to locate the import folder that contains your student data files (see Step2). Click "Next".

6. **Photos**

The Student Photos screen tells Principalm Connect where to find your student photo data. Choose "Do not import student photos", to disable photo import. Otherwise, choose "Import student photos using these settings" and follow these steps:

- a. Photo Folder – Enter the folder where your photos are stored, or click Browse to navigate to it.

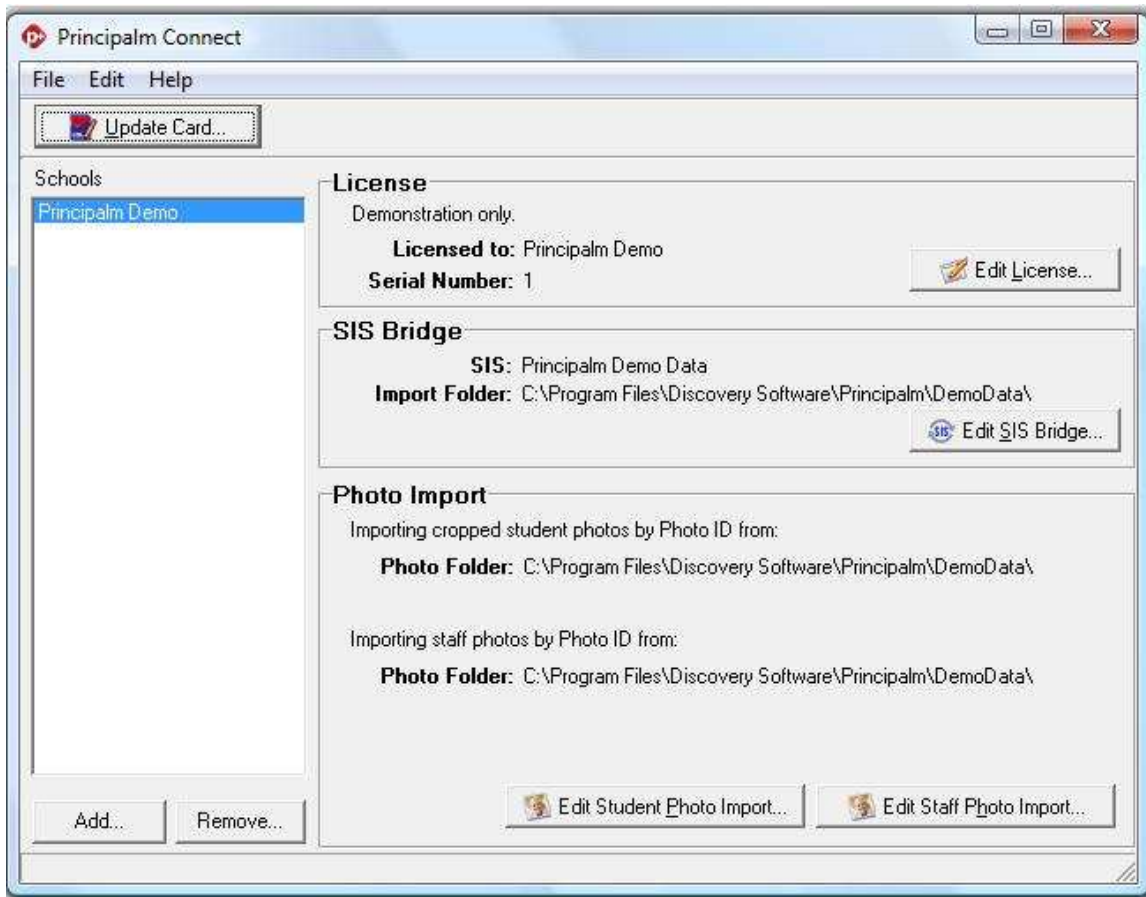
- b. Photos Are Identified By – select the method that is used to identify your photos. Choose from: Student Number, SSN, State ID and Photo ID.
- c. Choose whether your photo files are named with the data you specified in step b, or whether they are named inside a separate index file. If the latter, enter the name of your index file beside Index File or click Browse... to browse to it. The index file need not reside in the same folder as your photos.
- d. Crop photos (optional) click “Next”.

**7. Staff Photos**

Optional or use student photo settings

All the information necessary was entered during the set up. However, if you wish to edit any file locations, or enter a new activation code, you may do so at any time by choosing one of the options on the main Principalm Connect screen.

You’re almost ready to transfer all your school data to your handheld!



## Step 5: Transfer Data to Handheld

Data transfer to handheld steps:

1. Connect your memory card reader or BlackBerry® to your computer.
2. Insert a memory card into the reader (BlackBerry® must have the card inserted before connecting).
3. Run Principalm Connect (if it's not already running). The main screen appears.
4. Click the Update Card button to display the Card/Password Screen.

Update Card

Please select the location of your digital card, it appears as a drive on your desktop

Card Reader Drive: C: [C:\] Rescan

Choose your Principalm password. This is the password that you will enter to access Principalm on your PDA.

PDA Password: xxxx (4 to 16 characters)

Confirm: xxxx

Choose Rebuild local database to delete the information Principalm Connect has stored, and rebuild it using the current SIS data and photos. This will usually make update take much longer. Principalm Connect automatically detects changes in the existing data and photos, so this option should only be selected in cases where your configuration has changed completely, such as changing admin systems or year-end rollover.

Rebuild local database

Back Next Cancel

5. Enter the location of your memory card or BlackBerry® in the Card Reader Drive box. If it is not available, make sure it is connected and click Rescan.
6. Choose and confirm a password that will be required to access the data from your PDA.

7. If you have made substantial changes to your SIS data, such as a switch of admin systems or year-end rollover, check “Rebuild local database” to reconstruct the local database from scratch. This process will generally take longer than using the existing database
8. Click “Next”.
9. If you have multiple schools configured, you will be given a choice of which schools to include in the update. Check the schools that you wish to include and click “Next”.
10. Choose which information to include in the update. Click “Finish” to run the updater. A few seconds after the updater completes:
  - a. Palm®/Windows Mobile®: remove the card from the reader and insert it into your handheld
  - b. BlackBerry®: disconnect device from UBS Sync Cable.

## Using Principalm+: Palm® and Windows Mobile®

Using Principalm+ Steps:

1. Insert the SD card into your handheld. Principalm+ should load automatically.
2. Enter the password you created in Step 5. Click “Show” if you would like to see the characters you are entering.
3. You can now view a list of students. Clicking on a student will bring up a page with that student’s photo (if uploaded) and basic information.



For more in-depth instructions on how to navigate around Principalm+, choose “Help” then “Overview” from within Principalm+.

## Using Principalm+: BlackBerry®

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Using Principalm+ Steps:

Principalm+ is installed on the BlackBerry® by using the BlackBerry's Media application

1. On the BlackBerry®, open the Media application.
2. Press the Menu button, and choose Explore.
3. Open the Media Card folder
4. In this folder, there will be two Principalm+ installers; you may have to scroll down to see them:
  - Principalm BB Storm.jad – Principalm+ for the BlackBerry Storm
  - Principalm BlackBerry.jad – Principalm+ for all other BlackBerry devices.
5. Click on the appropriate installer for your device. If no installers are present, you will need to update your card first.
6. In the window that appears, choose Download
7. BlackBerry® may prompt you to reboot if this is the case, choose Reboot Now



Once Principalm+ is installed, you will be able to start it any time by clicking on the icon in the main menu or downloads folder.

For more in-depth instructions on how to navigate around Principalm+, choose “Help” from within Principalm+.

## Support

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Our Support team is available to assist you with set up and installation free of charge, Monday to Friday, between 7:00 a.m. and 4:30 p.m. PST.

Contact Support at:

[support@discoverysoftware.com](mailto:support@discoverysoftware.com)

Toll Free: 1-888-569-7711 Ex.2308