



Setup Guide

Revised: April 4, 2012

Developed by:



www.discoverysoftware.com

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Introduction

Principalm+, developed by Discovery Software Ltd., is a 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 your choice (Palm, Windows Mobile, BlackBerry, iOS devices, Android) 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

Handheld Requirements:

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

- **Palm®** OS 5 WITH a memory card
- **Windows Mobile®** Pocket PC 2003 or later WITH a memory card
- **Windows®** Smartphone 5 or later WITH a memory card
- **BlackBerry®** OS 5 or later WITH a memory card
- **BlackBerry® PlayBook™**
- **iOS™** (iPhone®, iPod touch®, or iPad®)
- **Android™** 2.2 or later
- **Android™** Tablet

Hardware Requirements:

- **Palm & Windows:** a memory card reader that is compatible with your memory card and computer. We recommend USB 2.
- **BlackBerry:** a USB cable
- **BlackBerry PlayBook:** WiFi (802.11) network.
- **iOS devices:** you will need a WiFi (802.11) network.
- **Android:** a USB cable or WiFi (802.11) network

Desktop Requirements:

- Microsoft Windows 2000 or later
- Mac OS X 10.2 or later (does not require Classic environment)
- WiFi (802.11) network

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+ requires 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.

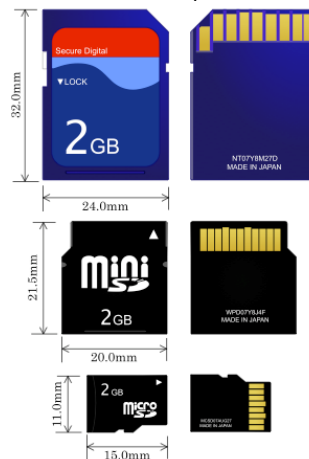
STEP 5: Transfer Data to Handheld

Transfer your school data to your handheld.

Step 1: Check Principal+ Requirements

Required software/hardware includes:

- This Principal+ Setup Guide.
- For updating Android, BlackBerry, Palm and Windows Mobile devices, 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. (Some devices *may* come equip with an SD Card)



- For updating iOS devices, sync requires WiFi (802.11) network.
- For updating Android devices, use USB connector cable or sync requires WiFi (802.11) network
- For updating BlackBerry devices, use BlackBerry USB connector cable. BlackBerry PlayBook sync requires WiFi (802.11) network.
- For updating Palm and Windows Mobile devices, use 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

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 see:

<http://discoverysoftware.com/support/kb/compatibility/nobridge/>

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

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:

Instructions may also be found here:

<http://discoverysoftware.com/support/principalm/help/connect/photos/>

Photo export steps:

1. Access the photo CD you got from your photo vendor (i.e. Lifetouch, Herff Jones etc).
2. Follow instructions on exporting the images in JPEG format here:
<http://www.discoverysoftware.com/support/principalm/help/connect/photos/>

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 to obtain a photo converting tool.

Step 4: Install Principalm Connect

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. Configure your SIS Bridge Settings

The SIS Bridge configuration tells Principalm Connect where to find data exported from your administration system (see Step 2: Export Student Data). Click "Choose" to select the folder you extracted the data to. Click "OK".

School Number – Is only required for some SIS bridges. Please consult your SIS Bridge documentation for instructions on this number.

3. Add School(s)

Click "Add my first school now...." The Add School 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 "OK".

4. Configure your Student Photo Settings

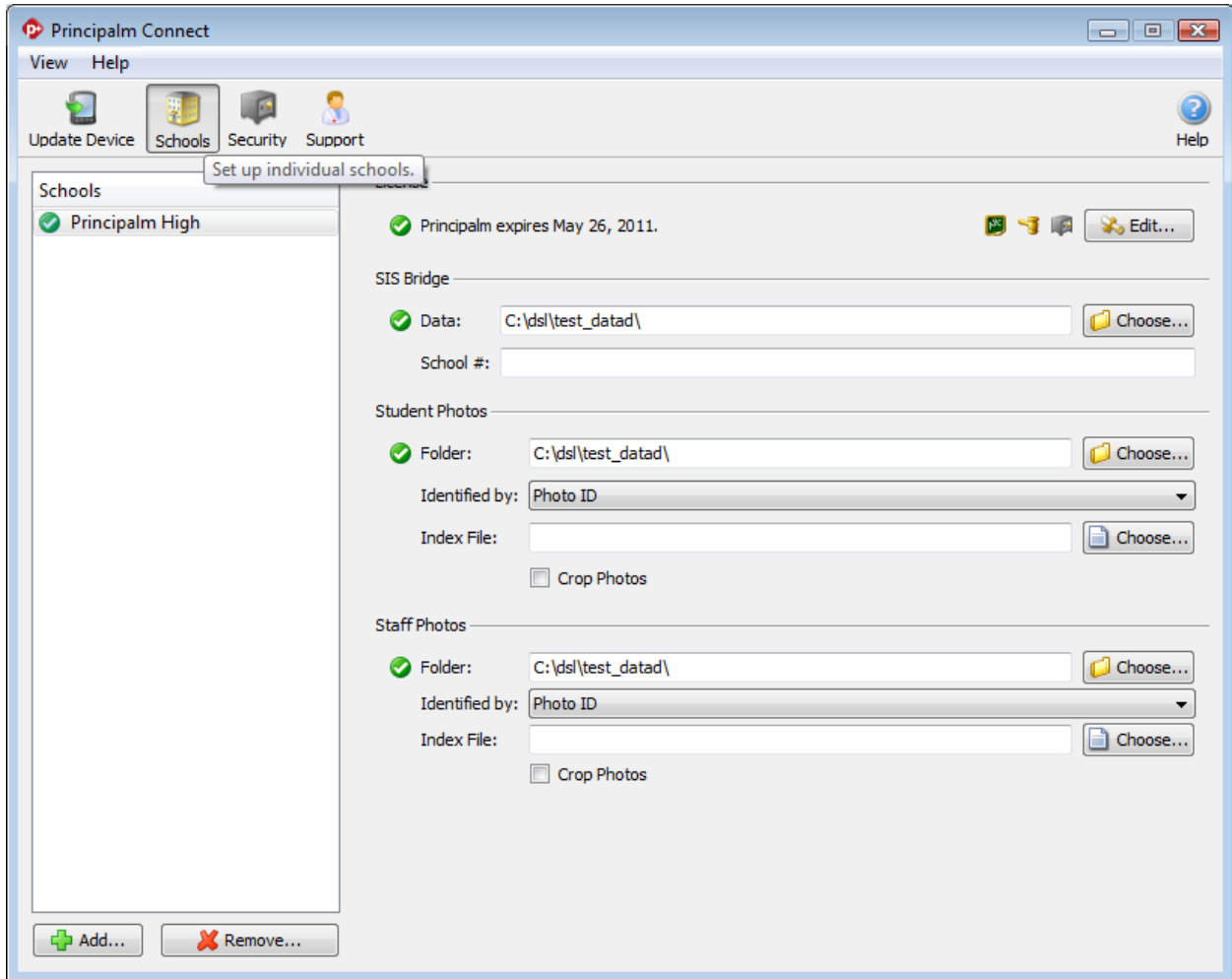
The Student Photos settings tell Principalm Connect where to find your student photo data. Follow these steps:

- a. Folder - Click "Choose" to select the folder where your photos are stored. Click "OK".
- b. Identified By - Select the data element that is used to identify your photos. Choose from - Student Number, SSN, State ID and Photo ID.
- c. Index File - If your photos are mapped to the student number using an index file, click "Choose" to select the index file.
- d. Crop photos (optional).

5. Staff Photos -Optional, or follow steps in 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.

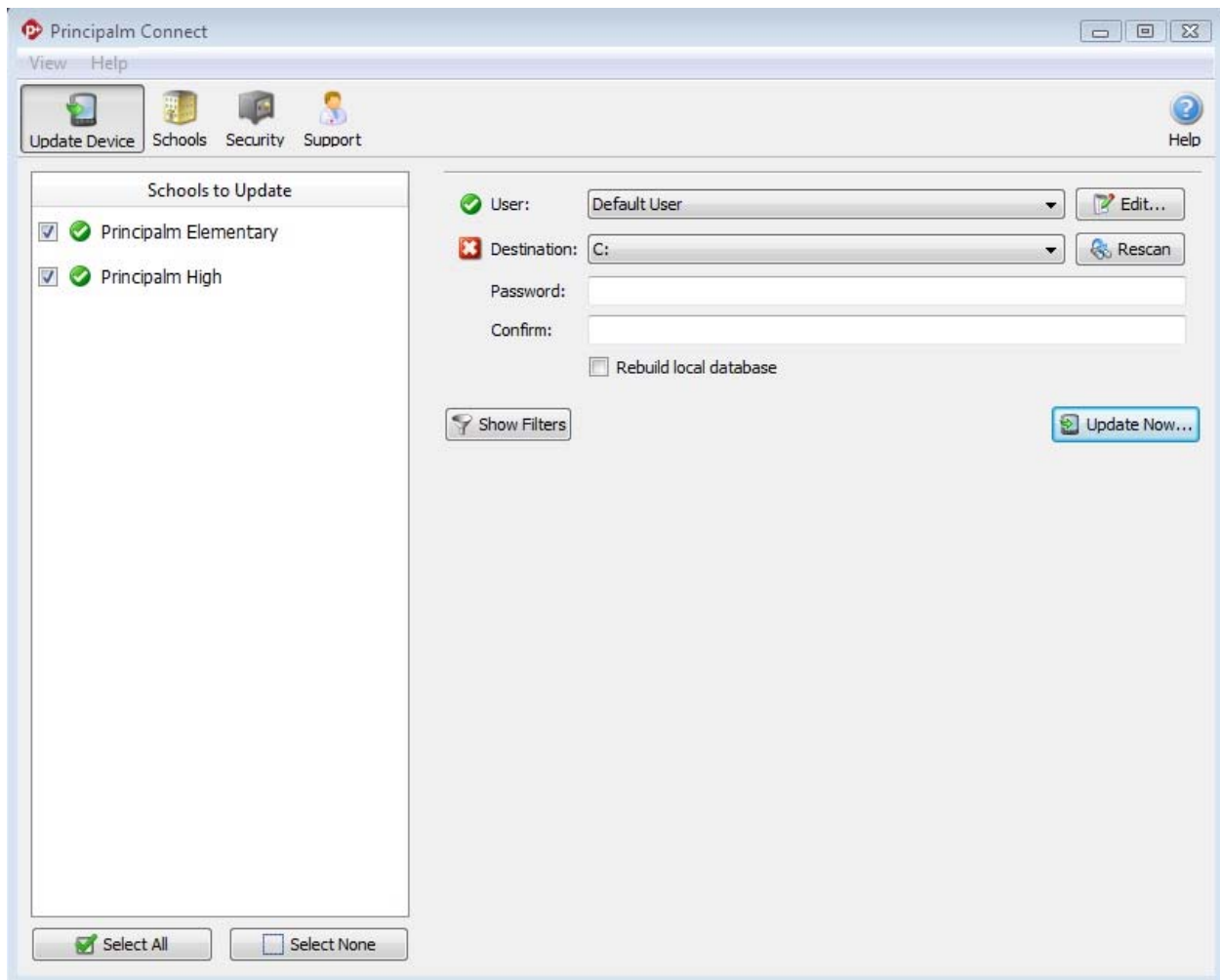
You're almost ready to transfer all your school data to your handheld!



Step 5: Transfer Data to Handheld

Data transfer to handheld steps:

1. Connect the required hardware to your computer:
 - **Palm/Windows Mobile:** connect your card reader to your computer, and insert your card.
 - **BlackBerry :** connect to computer using USB (device requires memory card)
 - **BlackBerry PlayBook:** Choose Update Service as Destination requires (802.11) network
 - **iOS device:** Choose Update Service as Destination requires (802.11) network
 - **Android:** connect to computer using USB cable (device requires memory card) OR choose Update Service as Destination requires (802.11) network
2. Run Principalm Connect (if it's not already running). The main screen appears.
3. If you have multiple schools configured, select the schools that you wish to include.



4. If you are updating Principalm+ on multiple devices and each user has their own password, click Default User | Add User to add each user.
5. Select the Destination:
 - **Palm/Windows Mobile:** select location of memory card.
 - **BlackBerry:** select location of memory card (or Update Service for PlayBook)
 - **iOS device:** select Update Service
 - **Android OS:** select location of memory card or Update Service

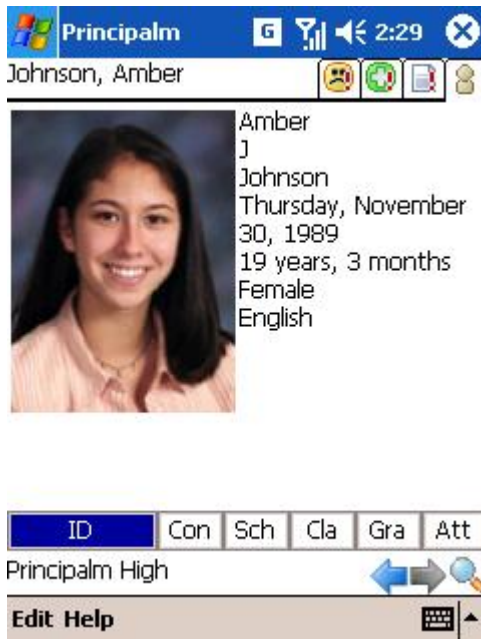
*If the memory card drive is not available, make sure it is connected and click **Rescan**. Check the computer disk drives to make sure the memory card is recognized by the computer.*
6. Enter and confirm a password that will be required to access the data from your PDA.
7. If you have made substantial 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 “Show Filters” to choose which information to include in the update.
9. Click “Update Now”.

Principalm+ Installation Steps, specific to device may be found here:
<http://discoverysoftware.com/support/principalm/help/principalm/installation/>

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: Transfer Data to Handheld. 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+.

Palm is a trademark of Palm, Inc.

Windows Mobile is a registered trademark of Microsoft Corporation in the U.S. and other countries.

Using Principalm+: BlackBerry®

Using Principalm+ Steps:

Principalm+ is installed on the BlackBerry by using the BlackBerry 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. Select "Install Principalm.htm"
5. Choose the link that matches your device operating system. If you don't know which operating system your device uses, scroll to the bottom and select "Help Me Choose"
6. In the window that appears, choose Download
7. Choose Yes to overwrite existing version, if prompted
8. BlackBerry may prompt you to reboot. If this is the case, choose Reboot Now
9. Run Principalm+ any time by clicking on the icon in the main menu or downloads folder
10. Enter the password you created in Step 5: Transfer Data to Handheld. Click "Show" if you would like to see the characters you are entering



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

Principalm+ Installation Steps, specific to device may be found here:
<http://discoverysoftware.com/support/principalm/help/principalm/installation/>

BlackBerry® is the trademark of Research in Motion Limited and is registered in the U.S. and may be pending or registered in other countries.

Using PrincipalM+: BlackBerry® PlayBook™

Installing PrincipalM+ Steps:

Subscribe to a Datasource

1. Select “Manage Datasources”, either from the initial help screen or the Dataset Drop down on the login screen
2. Select “Add Remote Data”
3. Optionally, enter a name for your Datasource.
4. Enter your servers IP address in the text entry field that appears
5. Click the refresh button
6. The datasets dropdown will contain the datasets currently available on the selected server
7. Select the dataset
8. Check the “Tell me when data changes” checkbox if you would like to be notified when new data is available from this datasource. When new datasets are available you will receive a notification in the Android notification tray so that you can select to download the latest data.
9. Check the “Automatically get data via WiFi” checkbox if you would like PrincipalM+ to download any new datasets without any intervention from you.
10. Click “Add” to add the new datasource to your subscription list.
11. Your new datasource will automatically download your first dataset. It will appear in the datasets dropdown on the login screen once the download is finished. You will be able to monitor the download using the notification tray.

PrincipalM+ Installation Steps, specific to device may be found here:

<http://discoverysoftware.com/support/principalM/help/principalM/installation/>

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Using Principalm+: iOS™ Products (iPhone®, iPod touch®, iPad®)

Installing Principalm+ Steps:

Principalm+ must first be installed using the App Store.

1. On your device, open the App Store
2. Click Search.
3. Type “Principalm”, and then select it from the list.
4. Click Principalm+, then Free, and then Install.
5. Enter your iTunes password, and then click OK.

Using Principalm+ Steps:

1. After the installation completes, open the Principalm+ application
2. Click Sync (requires WiFi network)
3. Select the name of the computer running Principalm Connect. Your school data will be downloaded
4. After the download is complete you will be asked for your Password. Enter the password you created in Step 5: Transfer Data to Handheld, then click Go
5. You will be brought into Principalm+. You can now view a list of student and their photos (if they exist). Tap on a student name to access detailed information such as demographic and contact information.



Principalm+ Installation Steps, specific to device may be found here:

<http://discoverysoftware.com/support/principalm/help/principalm/installation/>

Using Principalm+: Android™ OS Products

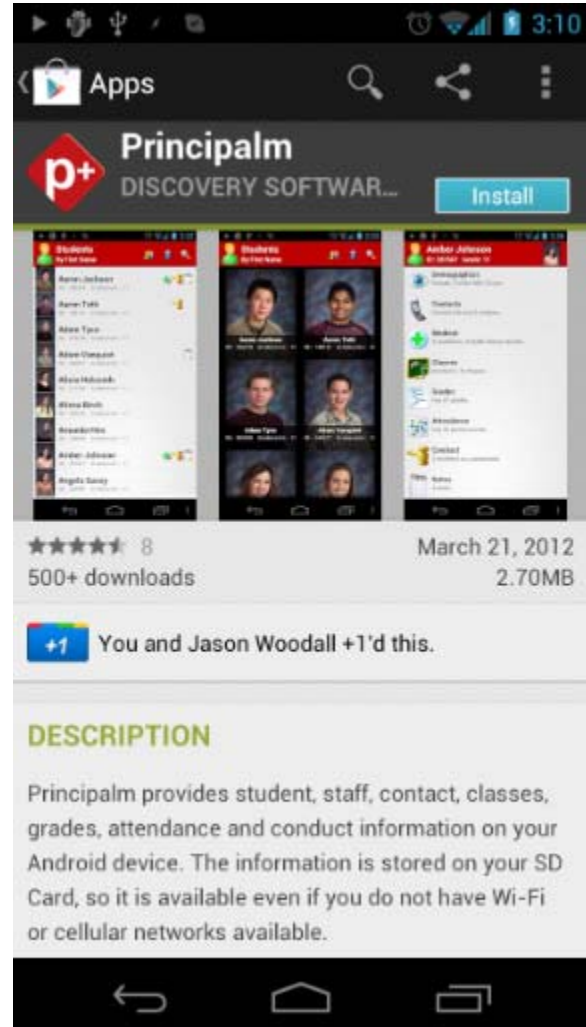
Installing Principalm+ Steps:

Principalm+ must first be installed using the Market.

1. On your device, open the Market.
2. Click the Search button.
3. Type “Principalm”, and then select it from the list.
4. Click Principalm, then Free then OK to accept permissions.

Using Principalm+ Steps:

6. After the installation completes, open the Principalm+ application
7. Choose SDCARD from the Data Source drop down menu. Or Manage Datasource for *Remote Android Data Transfer*
8. Enter the password you created in *Step 6: Transfer Data to Handheld* then click Login
9. You will be brought into the Principalm+ Dashboard. Choose Student, Staff, Conduct or Classes.



Principalm+ Installation Steps, specific to device may be found here:
<http://discoverysoftware.com/support/principalm/help/principalm/installation/>

Android™ is a registered trademark of Google, Inc.

Using PrincipalM+: Remote Android™ Data Transfer

Installing PrincipalM+ Steps:

Subscribe to a Datasource

1. Select “Manage Datasources”, either from the initial help screen or the Dataset Drop down on the login screen
2. Select “Add Remote Data”
3. If your server is automatically detected it will appear in the Server Dropdown. Otherwise select the red X and enter your servers IP address in the text entry field that appears.
4. Optionally, enter a name for your Datasource.
5. If your server was automatically detected, Select the correct server from the dropdown. Otherwise press the refresh button.
6. The datasets dropdown will contain the datasets currently available on the selected server.
7. Select the dataset.
8. Check the “Tell me when data changes” checkbox if you would like to be notified when new data is available from this datasource. When new datasets are available you will receive a notification in the Android notification tray so that you can select to download the latest data.
9. Check the “Automatically get data via WiFi” checkbox if you would like PrincipalM+ to download any new datasets without any intervention from you.
10. Click “Add” to add the new datasource to your subscription list.
11. Your new datasource will automatically download your first dataset. It will appear in the datasets dropdown on the login screen once the download is finished. You will be able to monitor the download using the notification tray.

PrincipalM+ Installation Steps, specific to device may be found here:

<http://discoverysoftware.com/support/principalM/help/principalM/installation/>

Support

Our Support team is available to assist you with set up and installation free of charge, Monday to Friday, between 8:30 a.m. and 3:00 p.m. PST. Please contact us if you would like to schedule a call.

Contact Support at:

support@discoverysoftware.com

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