



## SCHOOLLEADER V9 PRE-INSTALLATION CHECKLIST

### ENSURE THESE PRE-INSTALLATION REQUIREMENTS ARE ALL MET BEFORE INSTALLING SCHOOLLEADER V9.0

To ensure a successful installation, you need to follow this checklist. Do not assume any of these items are optional. If you cannot check off an item as being completed, please stop as the installation may fail. Call SchoolLeader support for any questions you may have regarding this checklist.

**My hardware requirements have been met or exceeded**

There are many different versions of Windows. While SchoolLeader supports the newer Windows versions, there are some restrictions with older versions. Ensure all your computers meet these minimum requirements:

- **Desktop OS Supported:** Windows XP<sup>\*1\*</sup>, Windows Vista, Windows 7
- **Server OS Supported:** Windows Server 2003, 2008, 2010 - SBS not supported<sup>\*2\*</sup>
- **Architecture Supported:** x86 (32-bit) or x64 (64-bit) - IA64 not supported
- **Minimum Processor:** 2Ghz Pentium class processor (or greater)
- **Minimum RAM:** 4 gigabytes for main server, 1 gigabytes for workstations
- **Minimum Disk space:** 10 gigabytes of free hard drive space (or greater)
- **Network Supported:** Ethernet, Cat5 wired Connection – Wireless not supported<sup>\*3\*</sup>
- **Other Recommendations:** DVD/CD-ROM: Reader, multiple USB ports, Serial Port

<sup>\*1\*</sup> **NOTE ABOUT WINDOWS XP:** In a multi-computer network setup, Windows XP is supported for workstations (e.g. FrontDesk Manager, CheckPoint Stations). However, XP is NOT recommended as a Server. In our testing, Windows XP performs poorly when managing simultaneous access to a shared database. If you use XP as your SchoolLeader server (in a multi-computer setup), you may experience performance issues. We recommend Windows Vista (or greater) as your SchoolLeader server.

<sup>\*2\*</sup> **NOTE ABOUT WINDOWS SMALL BUSINESS SERVER (SBS):** Windows SBS is a specially configured and packed product offered by Microsoft with preinstalled versions of Exchange Server, Active Directory Server, SQL Server, and more. It is intended to be used AS PROVIDED and Microsoft does not officially support reconfiguring or upgrading any of these items. SchoolLeader requires SQL Server 2008 R2 and must install its own instance of this product to run. For this reason, you should NOT use SBS to host your SchoolLeader database. If installing on a standalone Windows Server as listed above, there will be additional support costs from Kressa Software.

<sup>\*3\*</sup> **NOTE ABOUT WIRELESS:** Wireless is acceptable for workstations that are not business critical and get intermittent use. We do NOT recommend using wireless for CheckPoint, frontdesk workstations, etc. Wireless is inherently less reliable and you will experience periodic drops and lost connections with your database. Communication will also be substantially slower. Plan to hardwire your computers together for best results

**My LAN (Local Area Network) is connected, configured, and verified to be working**

If you will be using SchoolLeader in a networked multi-computer environment, you must first setup this network and then connect all computers together. This is not a trivial task, and unless you are experienced in this subject, you may want to hire a local Computer/Network Technician. In general, this effort includes:

- Running LAN cabling from each computer location to a central hub
- Configuring your hardware for network access (including printers, etc)
- Setting up your networking services (DHCP, DNS, Routers, etc.)
- Setting up any other networking features you need such as email, etc

If you do choose to hire a professional, keep the name and contact info for this individual or company, as additional support may be needed to maintain your PC environment.

**I have identified which computer will act as my SchoolLeader server and verified it qualifies to host the SchoolLeader database**

One computer on your local network will host the SchoolLeader database and server software. It can be a dedicated server (recommended method), or it can be a computer that also serves as a user's workstation. Regardless, this computer must satisfy the Server hardware requirements as follows;

- Runs a Windows Operating System (32bit or 64bit) certified for SchoolLeader:
  - Windows XP-SP3
  - Windows Vista SP2
  - Windows Server 2003 SP3
  - Windows Server 2008 SP2
  - Windows Server 2008 R2 SP1
  - Windows 7 SP1
- Processor Speed greater than 2Ghz (Intel or AMD)
- Minimum RAM: 4 gigabytes for main server, 1 gigabytes for workstations
- Minimum Hard Disk space available: 5 gigabytes
- Network: Cat5 wired Ethernet Connection (***WIRELESS not recommended or supported***)
- Internet Access: High speed access recommended (for support and software updates)

If this computer is hosting other applications that also use the Microsoft Database Management System (DBMS) called SQL Server, contact Kressa software for a one-on-one assessment of the computer to determine if it can be used to host SchoolLeader's database.

**Additional server recommendations:**

- Do not use a laptop as your server
- Avoid using an email server such as "Exchange Server" to also host the SQL Server DBMS
- Avoid using the Checkpoint Station computer as your server
- Know your logon credentials to your Windows server as an ADMINISTRATOR (your tech can provide the logon credentials if he/she setup the computers for you)
- Clearly label the SchoolLeader server. Your staff will need to know where it is physically located as SchoolLeader support will need access to this server when diagnosing problems.

- I have identified which computer(s) will act as my SchoolLeader workstation(s) and the role each will perform.**

SchoolLeader is provided with a per-site license rather than per-user or per-computer license. As a result, you are free to install SchoolLeader on an unlimited number of computer workstations as long as those workstations are networked together and support one licensed SchoolLeader server/location. Also, there are many add-on features such as automatic door controllers, check scanning, etc., that might you may choose to use on one more of these workstations. As a result, take inventory of the computers you plan to use as SchoolLeader workstations, and the features you plan to use on each. Then provide Kressa with this inventory so we can help ensure you are setup correctly with the software and licensing info for these various third party add-on features.

**Your FrontDesk Workstation(s):** The FrontDesk Manager workstations are used for your daily operations. You can run FrontDesk Manager simultaneously on multiple workstations connecting to a single database, however, make sure these FrontDesk Workstations pass this v9 pre-installation checklist before installation can begin. There are also many add-on features that can be used with these workstations. Let Kressa know if you are using credit card readers, check scanners, biometric scanners, etc.

**Your CheckPoint Workstation(s):** The CheckPoint workstation(s) are used for attendance entry for employees and students. You can run CheckPoint simultaneously on multiple workstations. There are a few add-on features that can be used with these workstations as well. Let Kressa know if you are using biometric scanners or any electronic door controllers with our software, etc.

- High Speed Internet Access Is Active On All My SchoolLeader PCs**

Internet access is required for SchoolLeader software installation and updates. Internet access is also required to perform regular *Microsoft Windows updates* as well as allowing remote access for technical support. Do not proceed without internet access on all SchoolLeader PCs.

- NO Wireless Is Being Used To Connect My Primary Schoolleader Computers OR I am using wireless but understand the possible issues with Wireless connections**

Wireless networks are great for home use, browsing the internet, and short use tasks. However, they are not suitable for a multi-user, multi-task, "always on" application such as SchoolLeader. As a result, plan to have your primary FrontDesk Manager workstations and any CheckPoint Stations "hard wired" to your Local Area Network for best results. If you must use wireless, expect to experience periodic dropped connections during the day similar to what you might experience with a wireless phone.

- For Existing Customers Reinstalling Or Upgrading - My Current Schoolleader Database Has Been Backed Up And Secured On An External Or Removable Drive**

Please take backups seriously and perform them before upgrading AND on a regular basis thereafter. If you are not familiar on how to perform a SchoolLeader backup, please read the online user's guide or contact SchoolLeader support for assistance before doing any upgrades of your SchoolLeader software.

**All Of My Schoolleader PCs Have The Latest Microsoft Windows Updates Installed**

Before you begin the installation, YOU MUST verify every SchoolLeader computer is up to date with the latest Windows updates, which includes security, software and service packs from Microsoft. Read and follow the separate document titled “*How to perform Critical Windows Updates before installing SchoolLeader*”.

If you do not have that document or cannot find it on the download page of our website, please STOP here and contact SchoolLeader Support at 800-858-8570 or email at [support@kressa.com](mailto:support@kressa.com)

**I have disabled UAC for the installation step (This Does Not Apply to Windows XP)**

Ensure **UAC** (User Account Control) is turned off (Start Menu, Control Panel, User Accounts, Change User Account Settings). Depending on the version of Windows, you may need to slide the bar to the bottom (turn off), or uncheck the UAC box. NOTE: A reboot will be required after turning off UAC. You can turn UAC back on after the installation is complete.

**If Upgrading From A Prior Version - I understand I must plan to Install SchoolLeader v9 on All PCs (including any Checkpoint PC) and cannot mix different versions**

Mixing different versions of SchoolLeader on different computers can cause serious problems. This can happen if you are upgrading or reinstalling SchoolLeader and don't upgrade ALL SchoolLeader PCs. Install using the correct SchoolLeader setup. Also, you may have older installations kept on CD or stored on your PC. To avoid mistakes of which version is the 'current' version, discard any old versions of SchoolLeader installations once you upgrade. Every release of SchoolLeader is cumulative and you cannot rollback your database to work with older software. For this reason, older copies of SchoolLeader software are of no value and are best discarded.

**I Have Temporarily Turned OFF Virus Software And Permanently Disabled Any Third Party Firewall Software On All PC's**

Virus software is a good tool to have installed. SchoolLeader will work with most major versions. However, many Virus checking programs include features that monitors network communications in 'real time' and can block or interfere with this installation. For this reason, temporarily disable any virus software during this installation.

Firewall Software is built into Windows for blocking unwanted access to your PC. Also, your internet Router may have firewall functionality already built into it as well. As a result, third party firewalls often provided as bundled features in Virus Software products (e.g. Norton Firewall) are redundant, will slow down your computer, and are generally not necessary. However, if you prefer to leave it active, you will need to program it yourself. The SchoolLeader installation can only automatically program the built-in Windows Firewall for you. Contact Kressa Software for a list of ports that must be opened if you wish to use a third party firewall. The manufacturer of that product might be able to help you program it. Please note, McAfee and AVG have known issues interfering with SchoolLeader functionality. If you are running either of these Virus programs they need to be uninstalled permanently.

**I Can Log Onto Windows with FULL Windows Administrator Rights**

Running SchoolLeader does NOT require administrative right. However, installing it does. Ensure you have a Windows Administrator account to use on this computer for the setup.

**I Have (Or Will) Perform a Fresh Restart Of My Computer(s) Before Starting The Installation**

A simple but important step to ensuring a successful installation is to reboot the PC. Often times there are pending updates from prior installations or currently running software which can interfere with the installation. Ensure you are starting from a fresh reboot of the PC. Select the START button and click RESTART. Do this now (if you are about to begin the setup, or remember to do it just before you eventually do begin).

**I Have Shut Down Any Programs Currently Running**

Look in your Systray to see if any programs are currently running. If yes, close out of those programs before beginning the installation.

**I Have Confirmed That the Server and Checkpoint PCs Do NOT Power Down (Power Options)**

The SchoolLeader server must be accessible at all times, and therefore, should not power down automatically. Please review the POWER options on the server to ensure it is set to NEVER power down. Also ensure that the Checkpoint PC POWER options are also set to NEVER power down.

**I Have Confirmed That My Backup Software Does NOT Execute During Business Hours**

While third party backup software is a great way for you to ensure that your data is being backed up and secured (preferably offsite) on a regular basis, running a backup during normal business hours can cause a lock on your database. Unexpected errors may result as you try to access the database while a backup process has a lock on the database. So if using a third party backup product, check its schedule to ensure that the backup takes place during non-business hours.

***If Extended Assistance Is Preferred – I have Scheduled My Installation With Schoolleader***

If you require our extended installation assistance, be sure it was scheduled with SchoolLeader Support **prior** to beginning the installation. Although we can accommodate our customer's needs for installation questions through the normal tech-support phone queue, please be aware that installations can sometimes take longer periods of time. For this reason, we cannot guarantee our availability for extended phone assistance unless it is scheduled in advance. If you have scheduled a separate computer technician to perform the installation for you, please schedule SchoolLeader support for the same date and time.

PLEASE NOTE: We do not directly perform reinstallations as part of your annual support subscription. If you prefer a SchoolLeader technician directly perform the entire reinstallation for you via a remote control session, there may be a fee. Contact SchoolLeader support for more details on that level of service.

**Congratulations on completing all of the pre-requisites for ensuring a successful installation!**