

V9 UPGRADE DIRECTIONS

These installation instructions apply to an UPGRADE to v9 from PCs currently running SchoolLeader software versions 6, 7, 7.1, 8, or 8.1

Once you have completed **all of the Pre-Installation Checklist** items (found in a separate document), follow these instructions to upgrade the SchoolLeader software on the server and workstations. Please ensure that you have successfully created a backup of your database before moving forward with the upgrade.

By now, you have received an email from Kressa Software that specifies:

- the download link for the software, including logon information
- the License Key File you will need to register the product. COPY (Copy, NOT OPEN) the License Key file to your server. Take note as to where you save this file as you will need to access it during the installation process, as well as for reinstallation purposes.

STEP 1: PREPARE TO UNINSTALL THE SCHOOLLEADER SERVER AND WORKSTATION SOFTWARE, DATABASE ENGINE AND SELECT 3RD PARTY COMPONENTS FROM ALL PCs (INCLUDING CHECKPOINT)

In preparation for the upgrade, you will need to uninstall older SchoolLeader software, SQL Server and other select 3rd party components from each SchoolLeader PC. Depending on the SchoolLeader version currently running, the list of components and their descriptions may vary. **It is best if you schedule a time with a SchoolLeader tech support representative who can help evaluate the software components that must first be removed.**

Here is a list of typical components to remove: (Uninstall from the Control Panel, Programs, Remove)

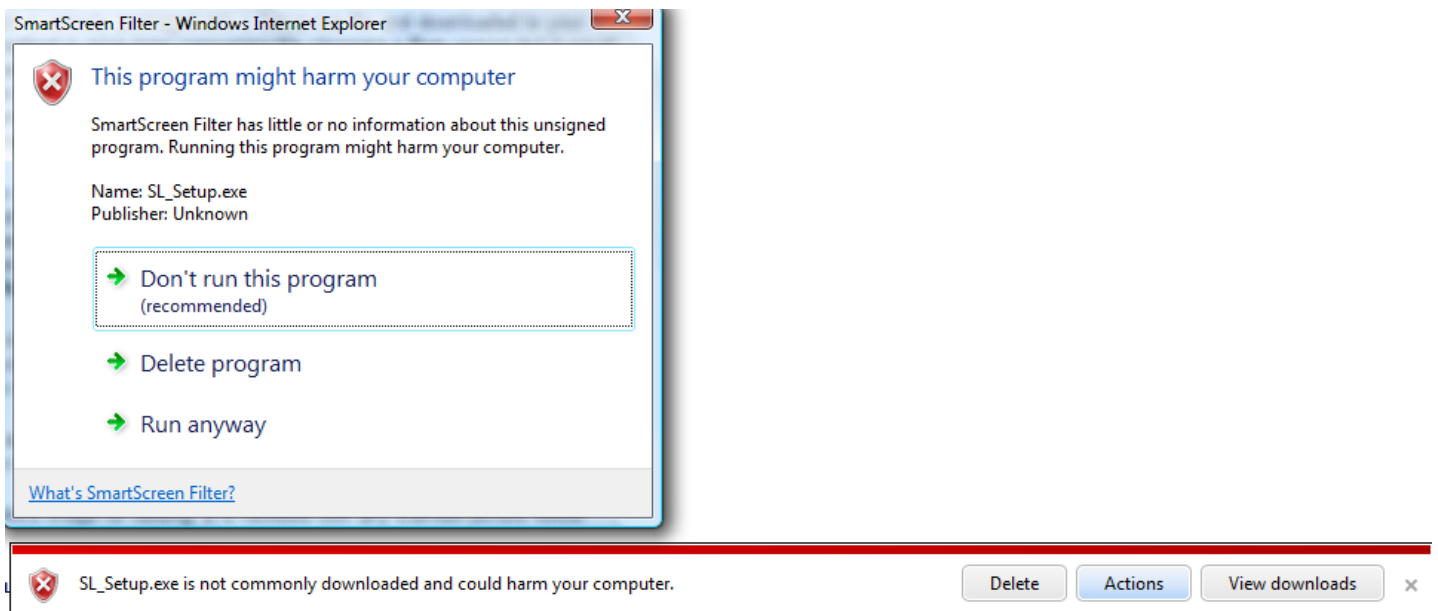
- SchoolLeader software (Server and Workstation versions)
- Microsoft SQL Server (SQL 2000, SQL 2005, SQL 2008) and all of its components such as Native Client, Backward Compatibility, Setup (English), Setup Support Files, VSS Writer, etc
- SAP Crystal Reports
- Business Objects Crystal Reports
- Tellerscan
- Neurotechnoljia

STEP 2: INSTALL THE SCHOOLLEADER SERVER SOFTWARE AND DATABASE

With your Registration key copied to an accessible location, the upgrade can now begin. A reboot is required.

1. Click on the SchoolLeader Download web link specified in the email
2. Enter the logon information provided in the email

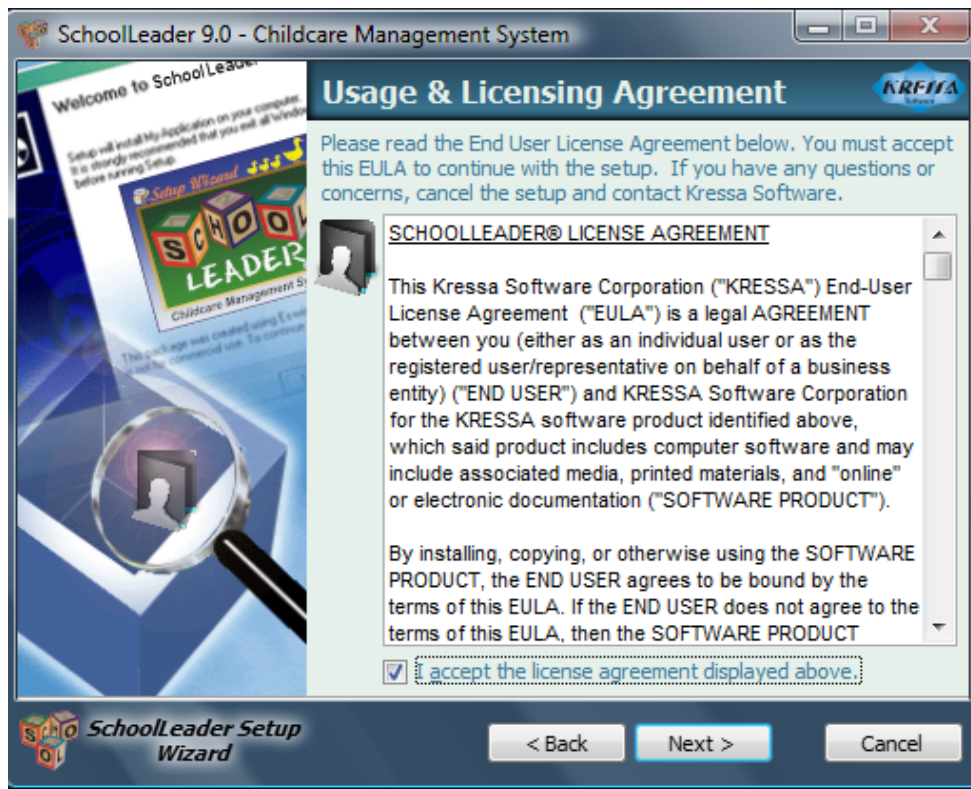
- Depending on your Internet Browser, you may receive Security Warnings about this program harming your PC. The prompts *may look similar* to the one below. If not, determine what options you need to choose in order to download and RUN the SchoolLeader setup.



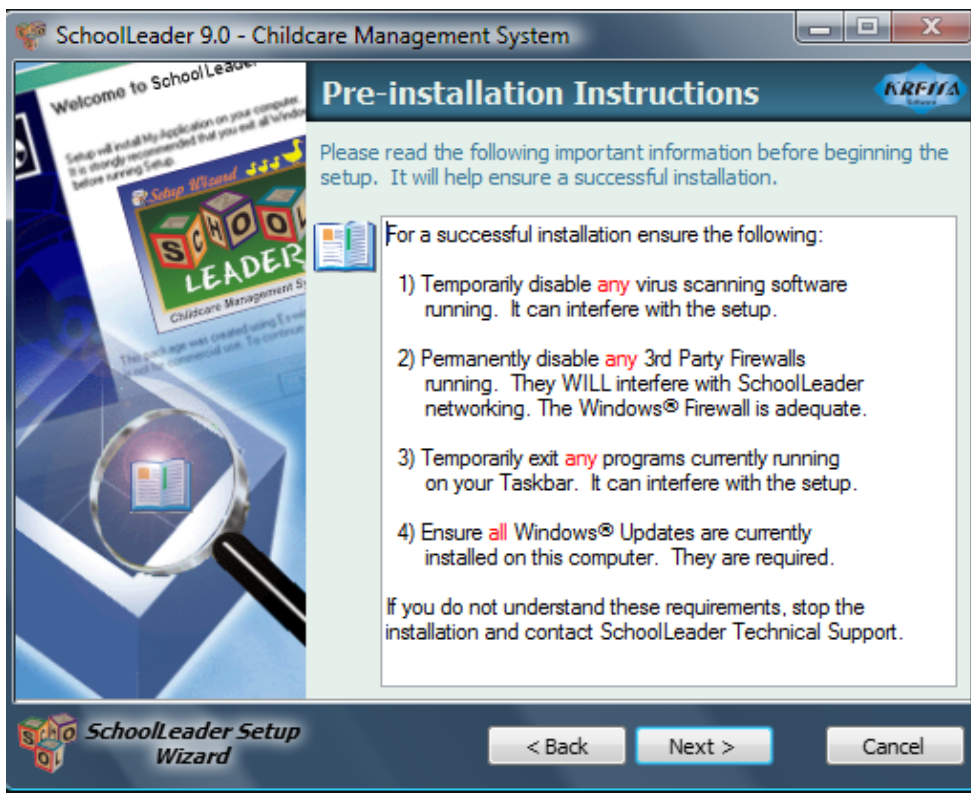
- Click on 'Actions' on the bottom of the screen; then click 'More Options', then 'Run Anyway'. The Installation process will now begin and display the Welcome window as shown below.



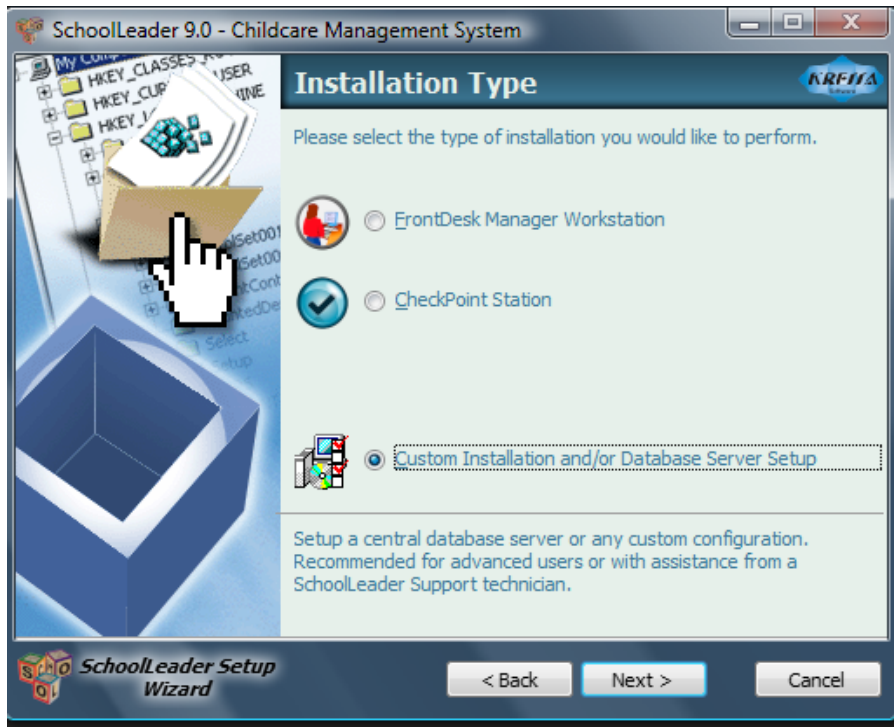
Click Next >



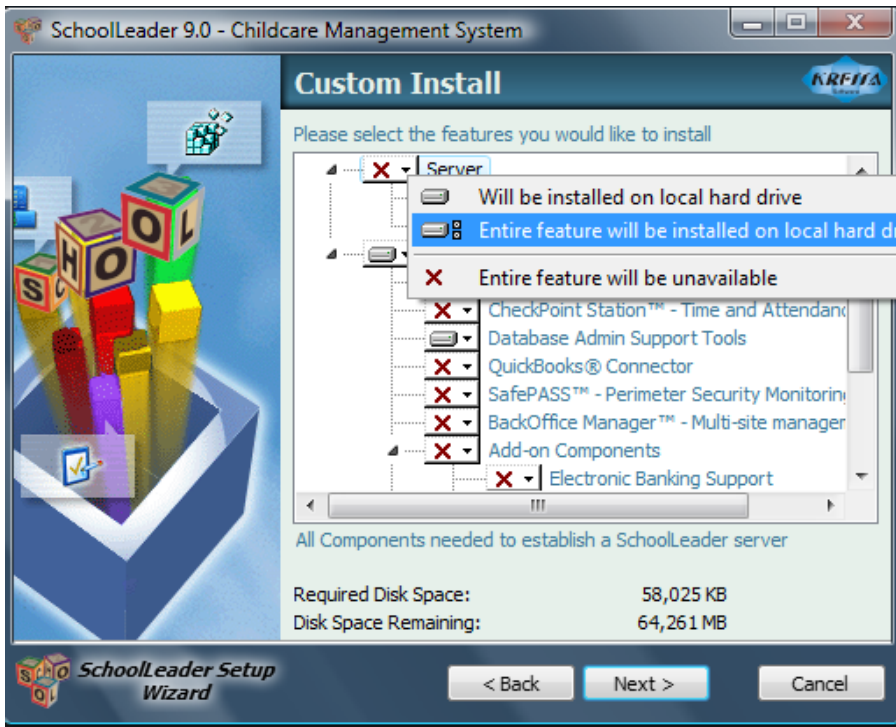
Read the License Agreement and select I Accept the License Agreement displayed above. Click **Next >**



Read the Pre-Installation Instructions. Verify all items are true. Click **Next >**



Select Custom Installation and/or Database Server Setup. Click **Next >**



Click on the DOWN arrow next to server and highlight 'Entire feature will be installed on local hard drive'.

Please select any other OPTIONAL SchoolLeader Features which *MAY* also be needed on this main SchoolLeader server. Additional features may be needed when the server will not be dedicated to this task and instead will also be used as a FrontDesk workstation, etc.

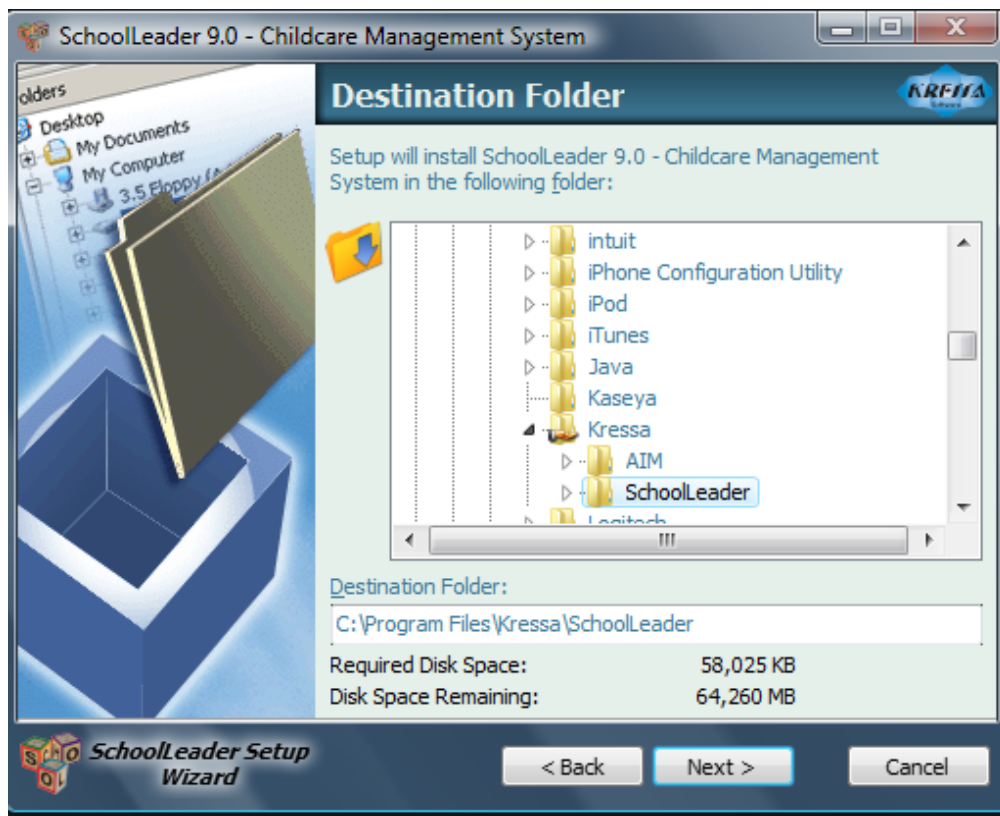
For example, if you plan to use the QuickBooks Connector and Electronic Banking features on this PC, select those options. To select features, click the DOWN arrow next to these options and select 'Entire feature will be installed on local hard drive'.

NOTE: To avoid wasting space on your computer, and slowing down future updates, it is recommended that you only install those features which

- you are licensed to use
- you intend to use

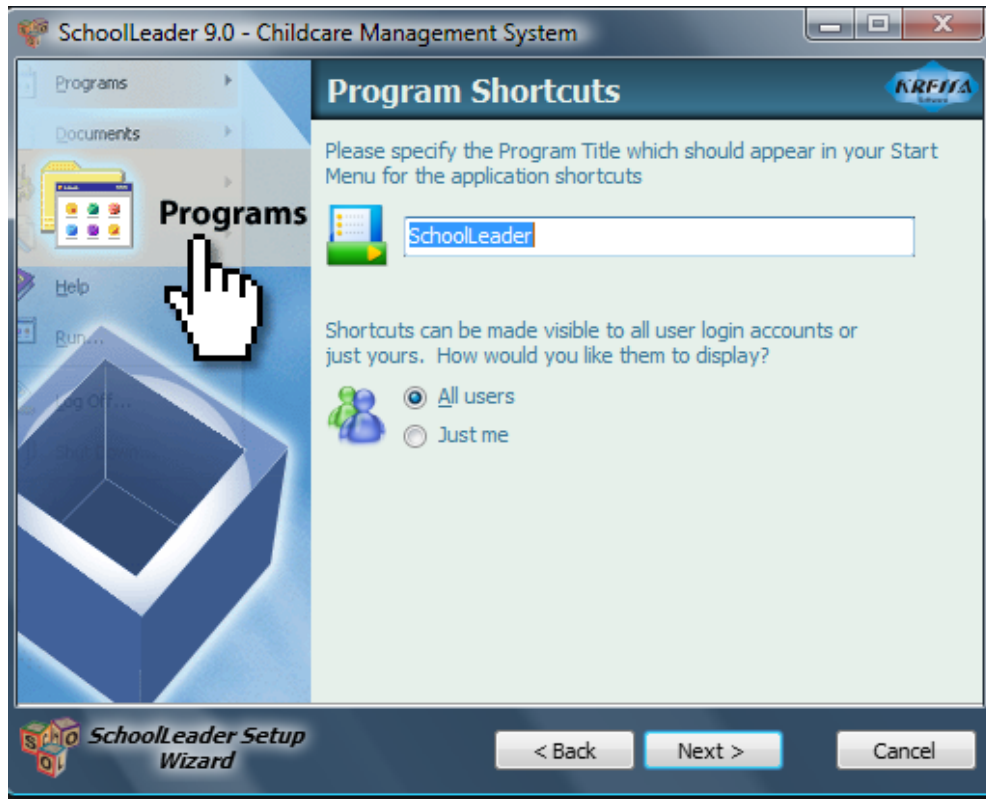
If you have any questions on what options to select for the server, please check with the center owner, or contact Kressa Support for guidance.

Click **Next >**



Specify the folder where the SchoolLeader Database will be installed. The default is your local c drive, which is a typical setup. Unless required, it is recommended you use the default location. However, if you have space limitations requiring you to install SchoolLeader on some secondary drive, now is the time to specify this location.

Click **Next >**

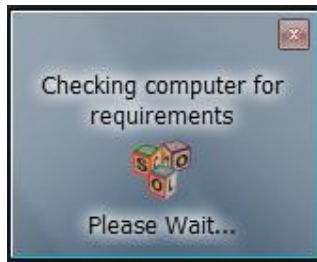


This is the Group name that will display in the “All Programs” list on your **Start Menu**. This will contain shortcuts to all installed SchoolLeader programs and Web Updater processes. We recommend you keep the default name to easily locate the SchoolLeader processes on your Start Menu in the future. Click **Next >**

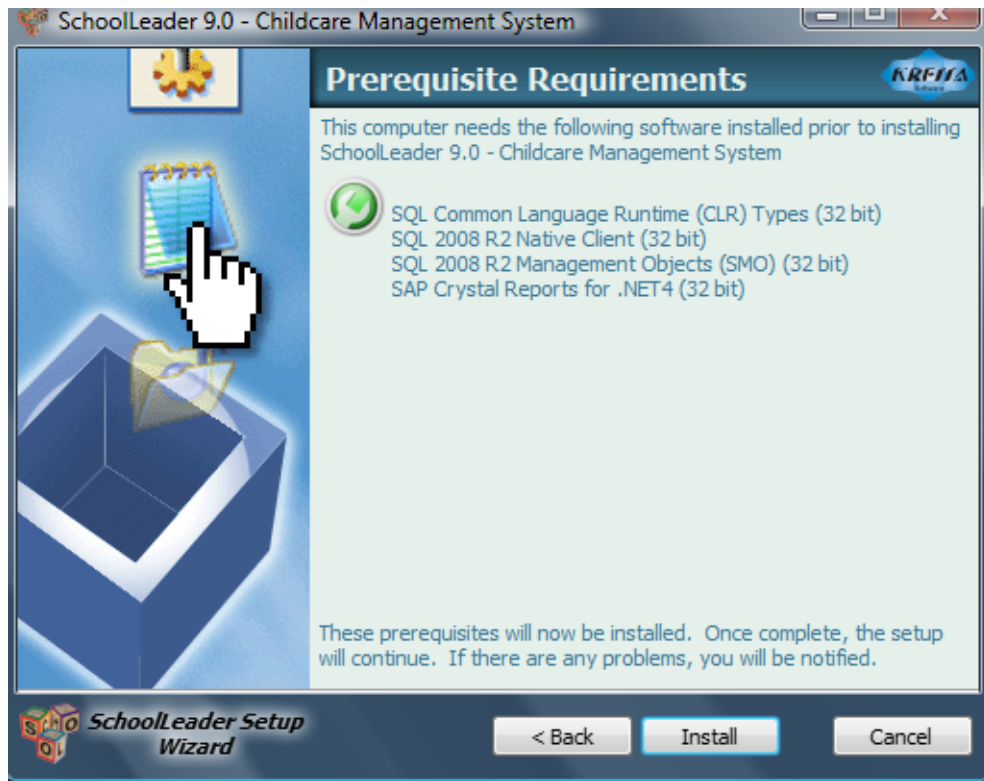


The wizard is now ready to begin the installation. Click **Install** when you are ready to begin

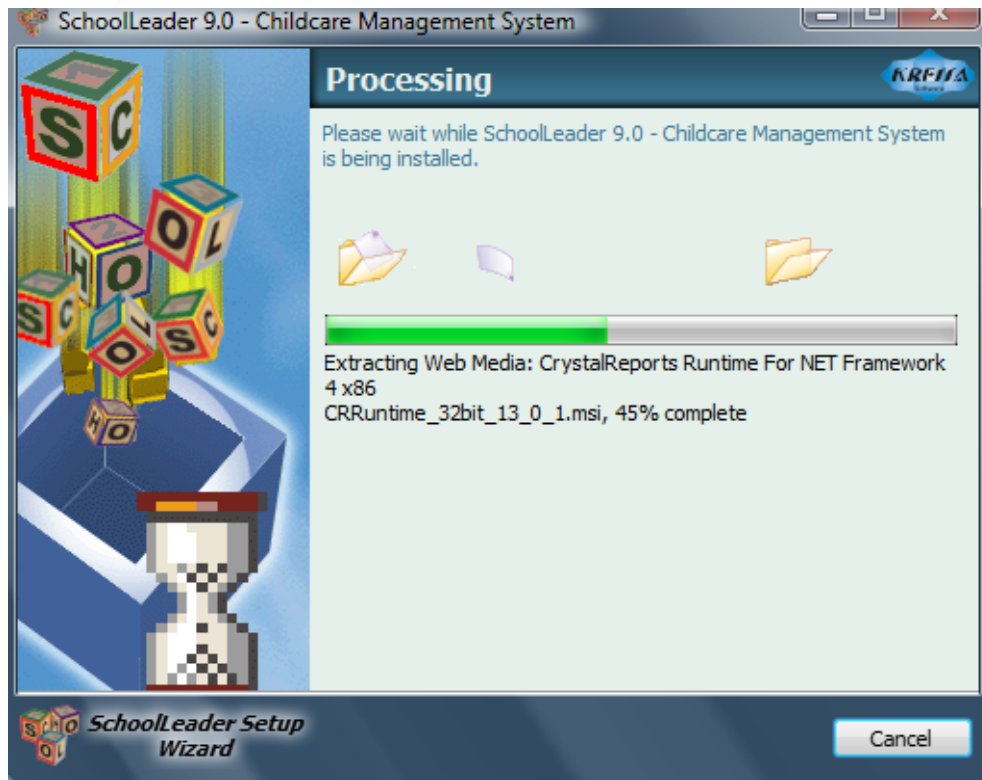
The installation process will first scan your computer for any needed prerequisite software needed. During this step the “Checking computer for requirements” window shown below will be displayed. This may take several minutes. Do not interrupt this process.



Doing your *Windows Updates* will result in most prerequisite software being installed, however, there are several more optional components not related to Windows or SchoolLeader that must be installed before proceeding. The installer will identify these items and display the prerequisite requirements in the window below. If none are needed, this window will not display and you can proceed to the next step.



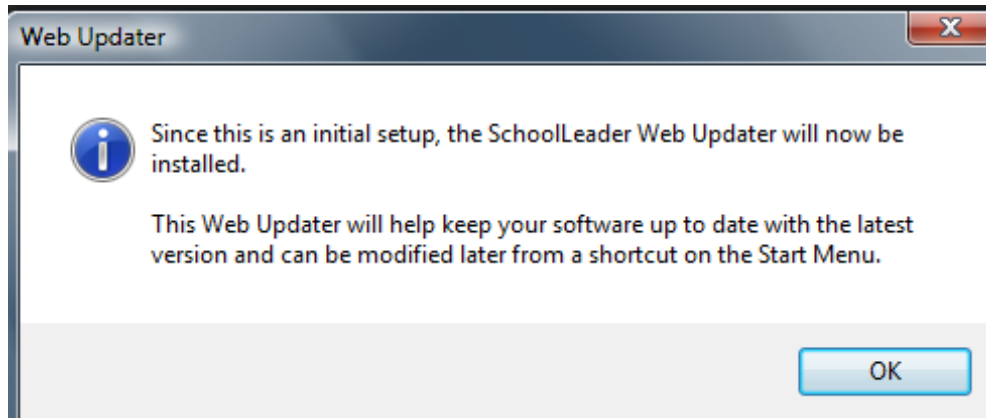
Note: this list of items shown above is for display purposes only. Your window may show different items. Regardless of the items in the list, there is nothing extra for you to do. Click **Install**.



While the software is being downloaded and installed you will see a progress window like the one above. Do not cancel unless you realize you have made a serious mistake and must abort. This step can take anywhere from 10-30 minutes depending on the features you selected and the speed of your internet connection.

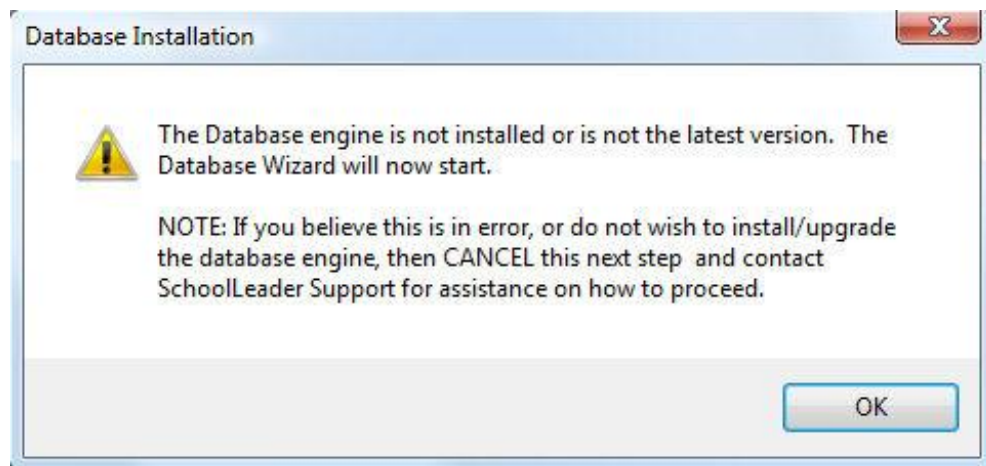


The SchoolLeader Server software has successfully installed. Click **Finish**.



The Web Updater will also be installed. (Information on the Web Updater can be found in a separate document titled “The SchoolLeader Web Updater”). Click **OK**.

Now we need to install the database components.



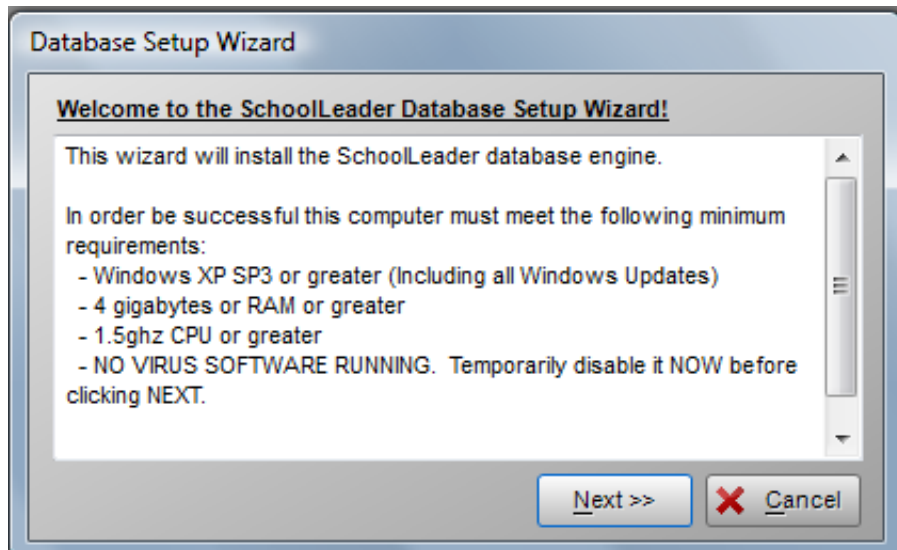
Near the end of the install you should see a window titled “Database Installation”. It will state that *“The Database engine is not installed or is not the latest version. The Database Wizard will now start.”*

This is what you should expect to see. Click **OK** to proceed on to the Database Setup Wizard.

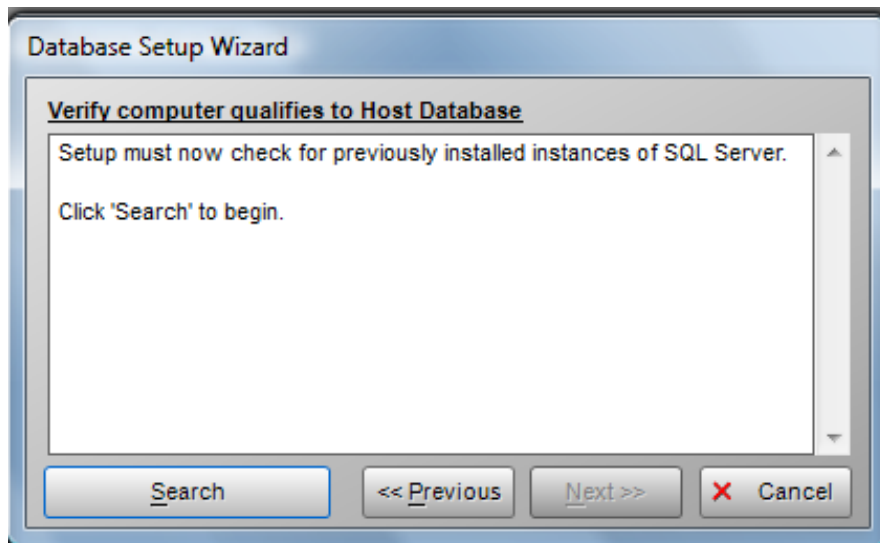
If you are running a Server grade OS, you will need to execute the SchoolLeader.DBSetup.exe MANUALLY.

- Using the CMD prompt (RUN Command, then CMD, change directory to where you have the SchoolLeader software.
- **For example** CD c:\Program Files (x86)\Kressa\SchoolLeader
- SchoolLeader.DBSetup.exe /ignoreconflicts

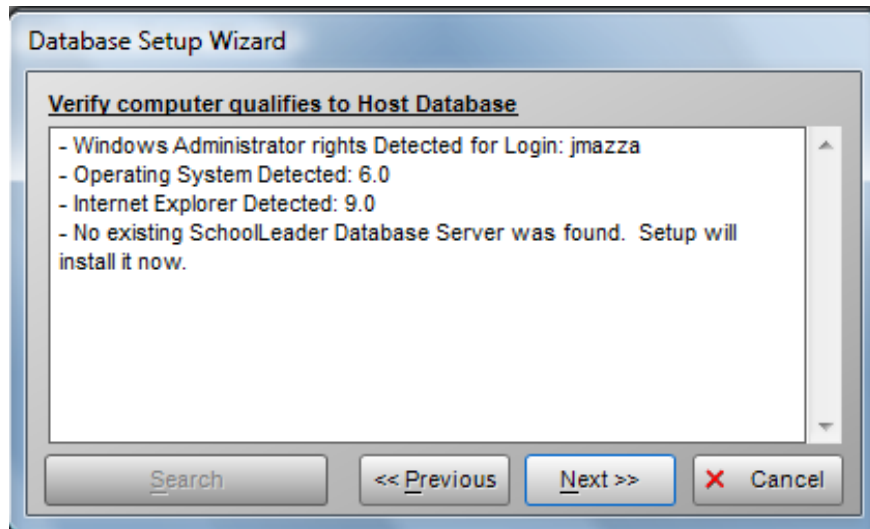
This will execute the DBSETUP and you must answer the prompts that recognize that this is a server OS and you are choosing to override the installation.



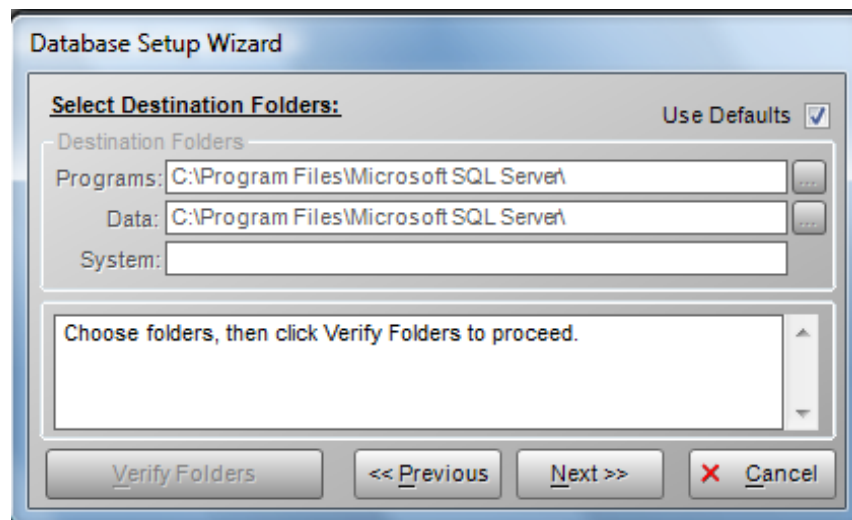
Click **Next >>**



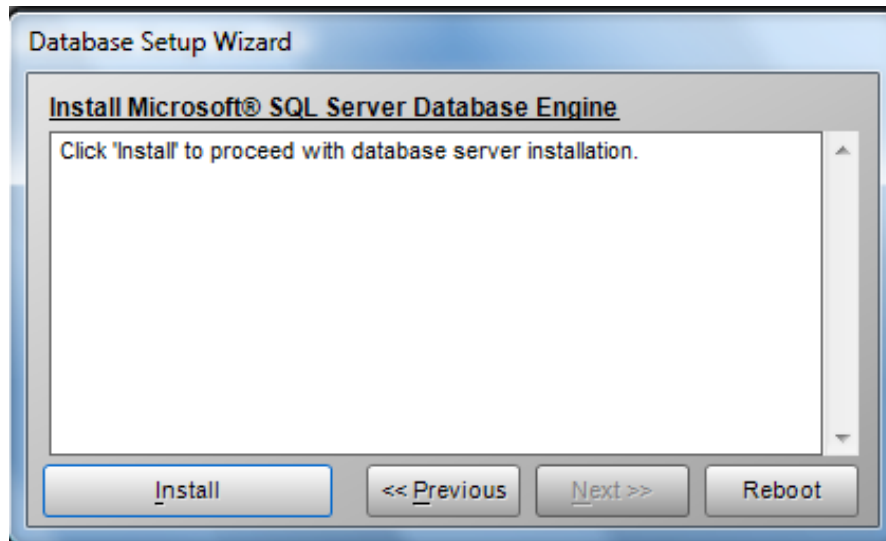
Click SEARCH. Please wait while the installation process searches for a pre-installed version of the SchoolLeader SQL Server database. This may take a few minutes.



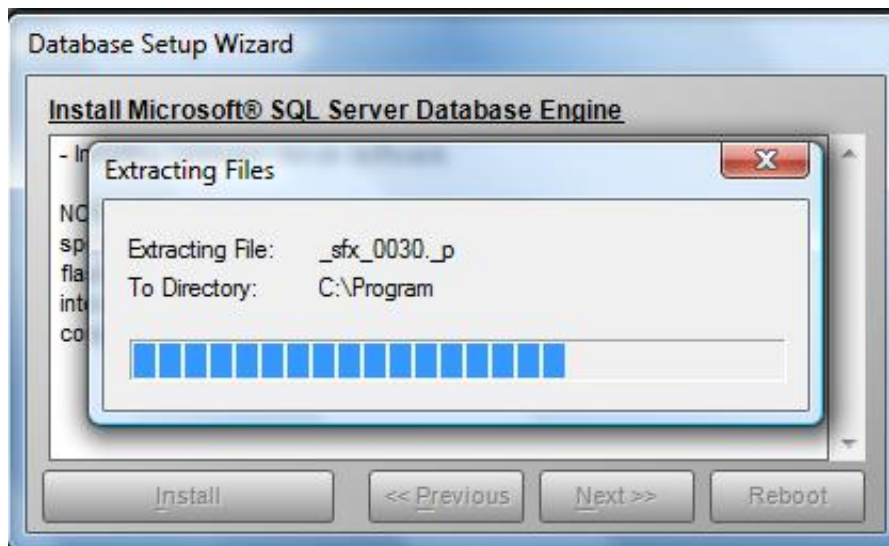
The window will display information about this PC. You should receive the message that “No existing SchoolLeader Database Server was found.” If a database is found, cancel the install and contact SchoolLeader Support. Otherwise, click **Next >>**



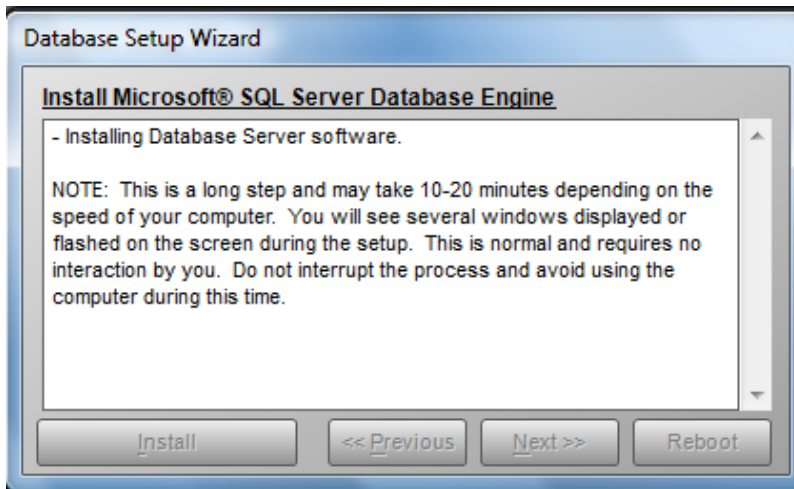
This window gives you the option to install some of the SQL Server Database components to a separate drive. This option is **NOT** referring to your data, whose location you already specified on page 5 of this document. We highly recommend you use the defaults as shown and Click **Next >>**



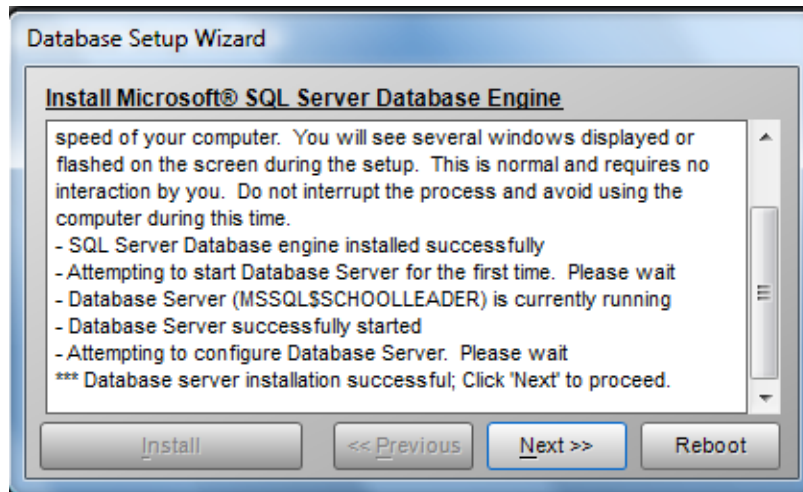
Click INSTALL. Please be patient as this step can take 10 - 20 minutes to complete.



First, a series of files will be extracted. There will be a message that the Extraction is Complete. Click OK

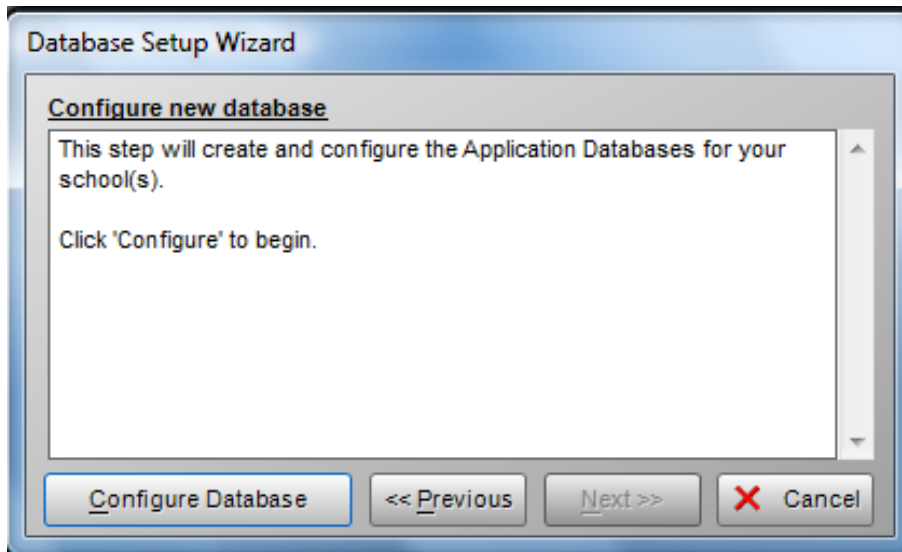


All buttons are 'grayed out' while the installation takes place. There will be a series of SQL Server Installation Windows Flashing on the monitor. No interaction is needed on your part.



The database will start up automatically for the first time. Please be patient while the database is configured. When the SQL Server installation is complete, you will see this screen with the last message in the status box stating "Database server installation successful"

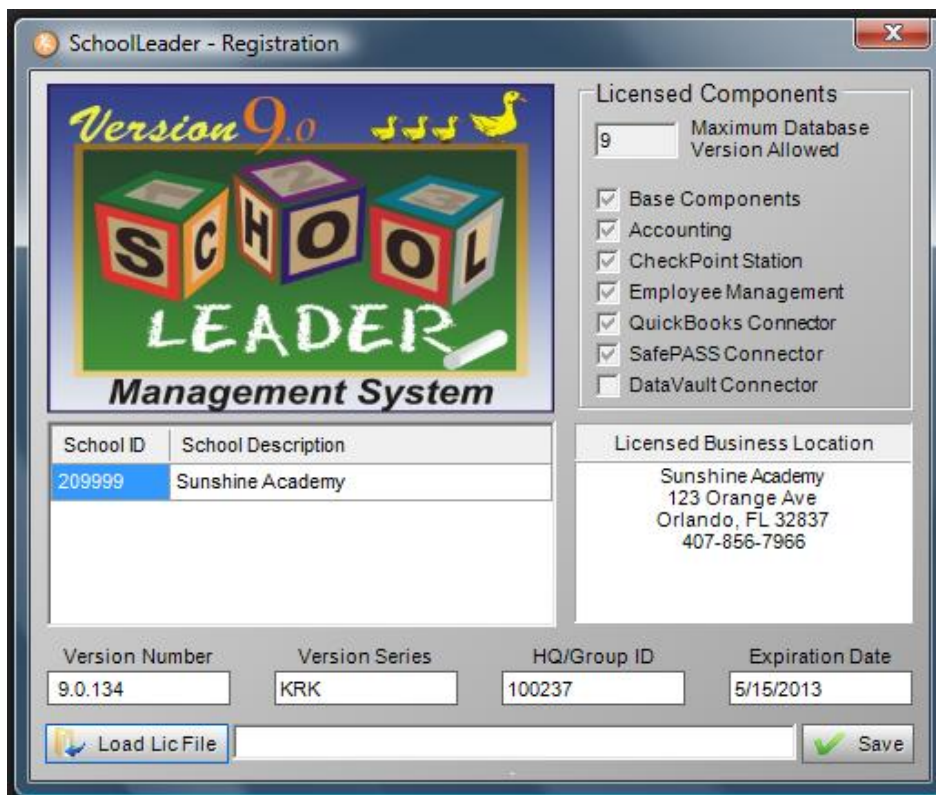
Click **Next >>**



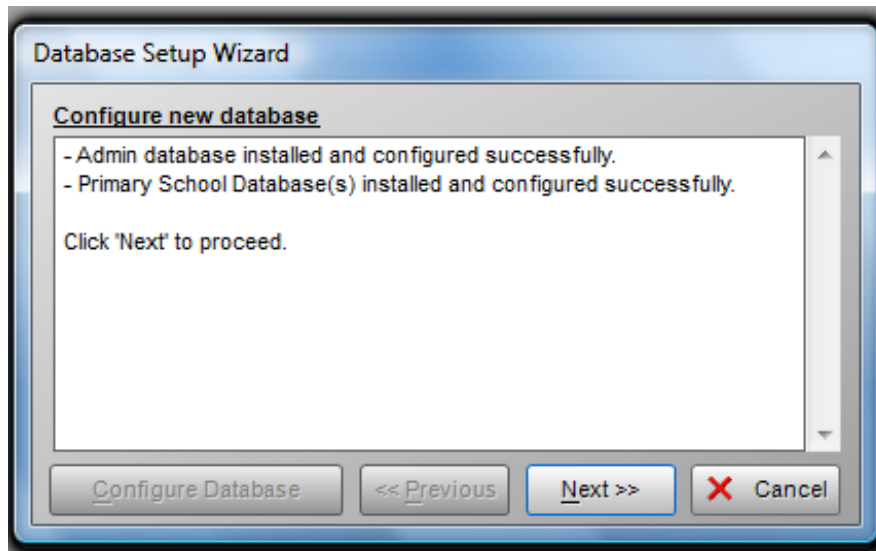
Click **Configure Database**

The Administration database is being configured. When it completes, click **OK**

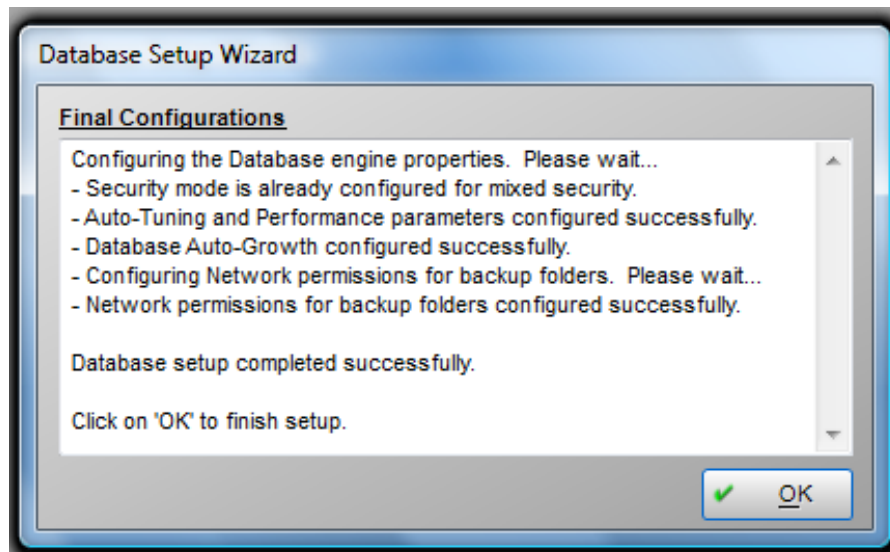
Now, wait while the Registration process begins. You will be prompted to select the Server you want to register. Select the Server, then click **CONNECT**.



- Click on the **Load Lic File** Button.
- Point to the License Key File you saved earlier (page 1). Then click on 'OPEN'.
- The Registration information is displayed.
- Click **SAVE**. Please wait while the database is configured. Click **OK** when "License Key Successfully Loaded"
- Close the Window



Click NEXT >>



Click OK

STEP 2: START SCHOOLLEADER FRONTDESK ON THE SERVER FOR FIRST TIME

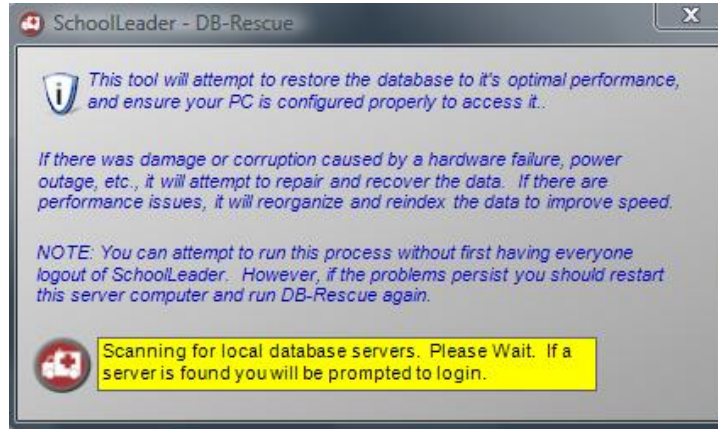
Double Click on the SchoolLeader FrontDesk icon on your desktop. If you get the error message 'database cannot be contacted', click on OK or CONTINUE. NOTE: You may get more than one window warning about this. Click CONTINUE on all messages until you reach the Login Window. Then enter the following:

- **Logon to FrontDesk program using your existing logon information**
- **Select the SchoolLeader server**
- **Select your school**
- Click on LOGIN
- Click YES to upgrade the database
- Once the database has converted, close SchoolLeader FrontDesk (yes, close the program)

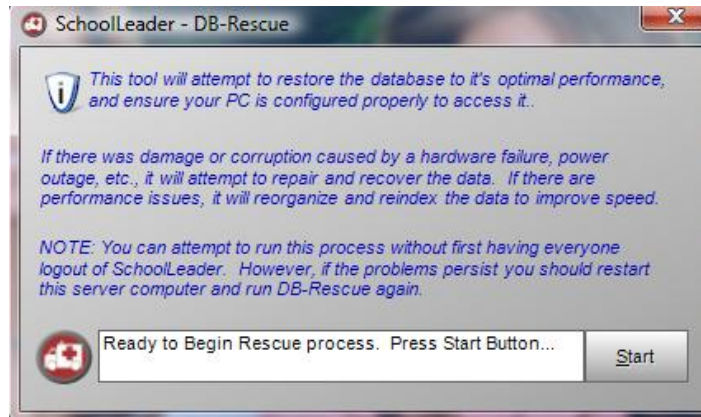
STEP 3: ENSURE DATABASE AND CONFIGURATION SETTINGS ARE ALL CORRECT

The database server installation is now complete. Run the SchoolLeader “DBRescue” tool now. This cleanup and repair tool checks the integrity of your database. A shortcut has been created on the desktop of this computer titled “SchoolLeader DB-Rescue”. It shows a picture of an ambulance.

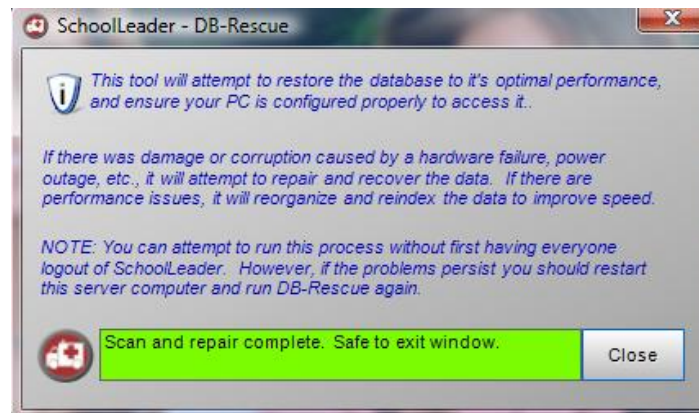
- **Right click** on the DBRescue shortcut and select “*Run as Administrator*” from the menu



Click **CONNECT**



Click **START**



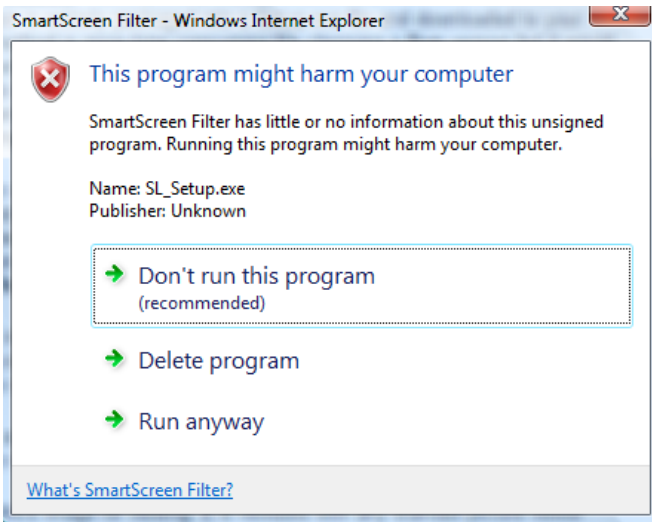
Click **CLOSE** when the Scan and Repair Has Completed

Reboot the Server. The server installation has completed.

STEP 4: INSTALL ANY ADDITIONAL FRONTDESK / CHECKPOINT WORKSTATIONS ON OTHER NETWORKED PCS

SchoolLeader is "Network Ready" and requires no additional software or licenses to operate on a LAN with multiple workstations. Follow these instructions to successfully setup one or more workstations.

1. Click on the SchoolLeader Download web link specified in the email
2. Enter the logon information provided in the email
3. Depending on your Internet Browser, you may receive Security Warnings about this program harming your PC. The prompts *may look similar* to the one below. If not, determine what options you need to choose in order to download and RUN the SchoolLeader setup.



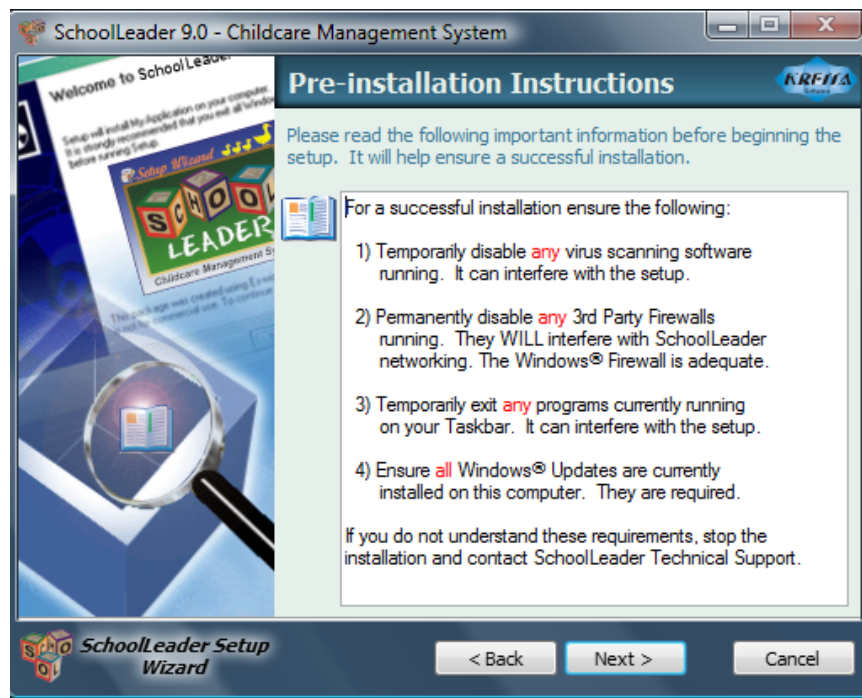
Click on 'Actions' on the bottom of the screen; then click 'More Options', then 'Run Anyway'. The Installation process will now begin and display the Welcome window as shown below.



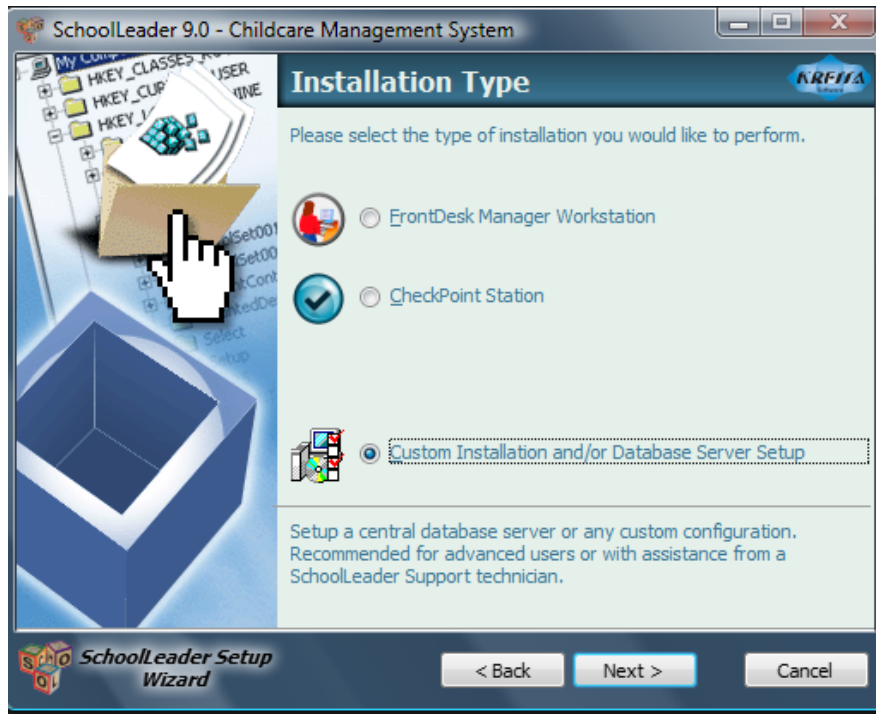
Click Next >



Read the License Agreement and select Accept the License Agreement displayed above. Click **Next >**



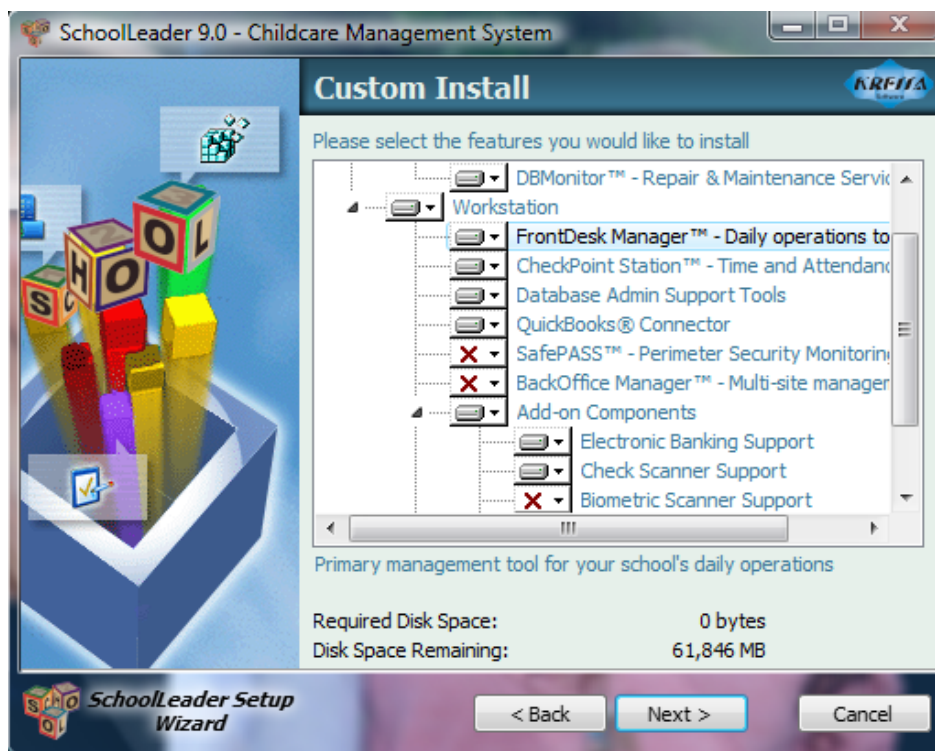
Read the Pre-Installation Instructions. Verify all items are true. Click **Next >**



Select the Installation Type.

- Select **FrontDesk Manager Workstation** (Basic Components Only) if this is a FrontDesk Workstation with NO OPTIONAL features such as electronic banking, QuickBooks interface, biometrics, etc
- Select **CheckPoint Station** if this is one of your Checkpoint Attendance Stations
- Select **Custom Installation and/or Database Server Setup** if you need to install OPTIONAL features such as electronic banking, QuickBooks interface, biometrics, etc

Click **Next >**



If you have chosen the CUSTOM installation, now is the time to choose which features you want installed on this workstation. DO NOT SELECT THE SERVER features, as your server has already been installed.

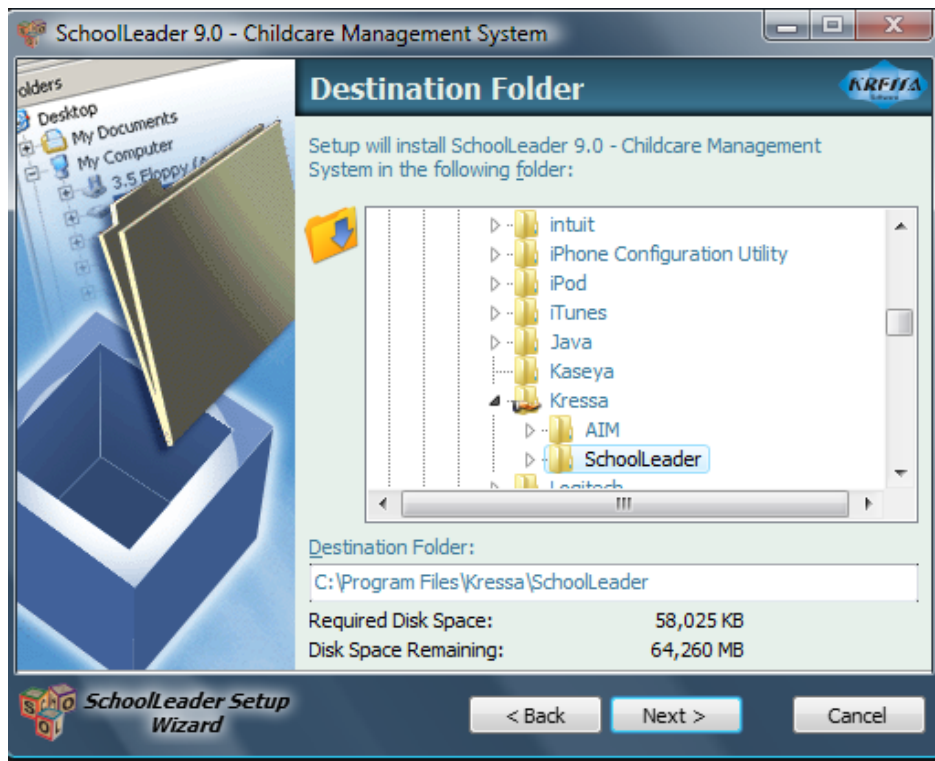
Click on the DOWN arrow next to the selected options and highlight 'Entire feature will be installed on local hard drive'. For example, if you plan to use the QuickBooks Connector and Electronic Banking features on this PC, select those options.. To select features, click the DOWN arrow next to these options and select 'Entire feature will be installed on local hard drive'.

NOTE: To avoid wasting space on your computer, and slowing down future updates, it is recommended that you only install those features which

- you are licensed to use
- you intend to use

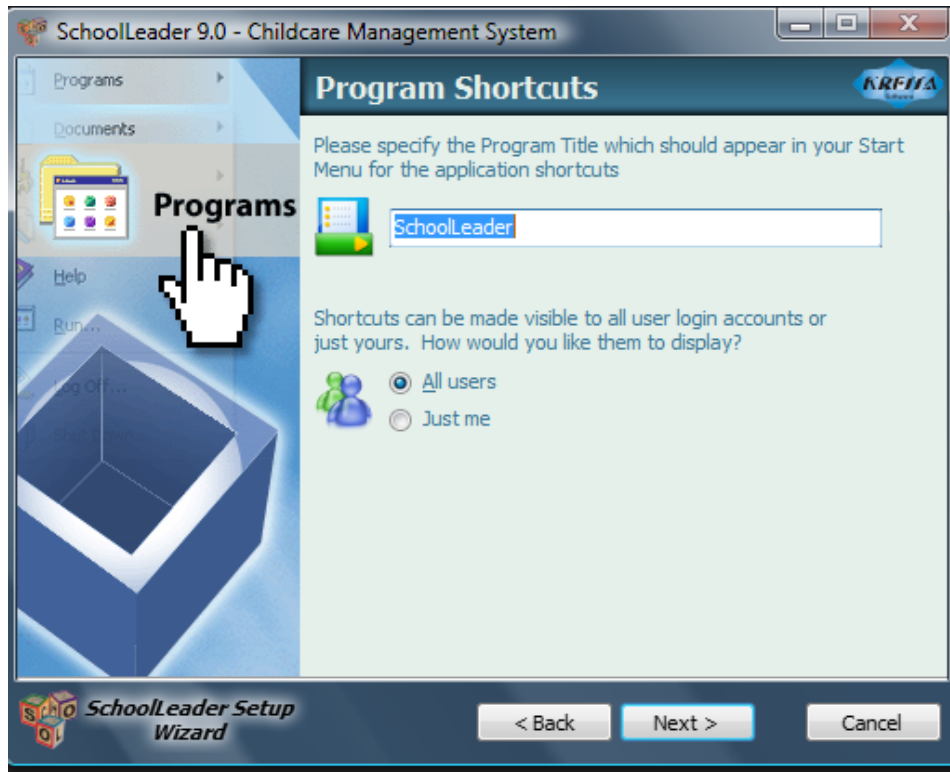
If you have any questions on what options to select for the server, please check with the center owner, or contact Kressa Support for guidance.

Click **Next >**



Specify the folder where the SchoolLeader Software will be installed. The default is your local c drive, which is a typical setup. Unless required, it is recommended you use the default location. .

Click **Next >**



This is the Group name that will display in the “All Programs” list on your **Start Menu**. This will contain shortcuts to all installed SchoolLeader programs and Web Updater processes. We recommend you keep the default name to easily locate the SchoolLeader processes on your Start Menu in the future. Click **Next >**

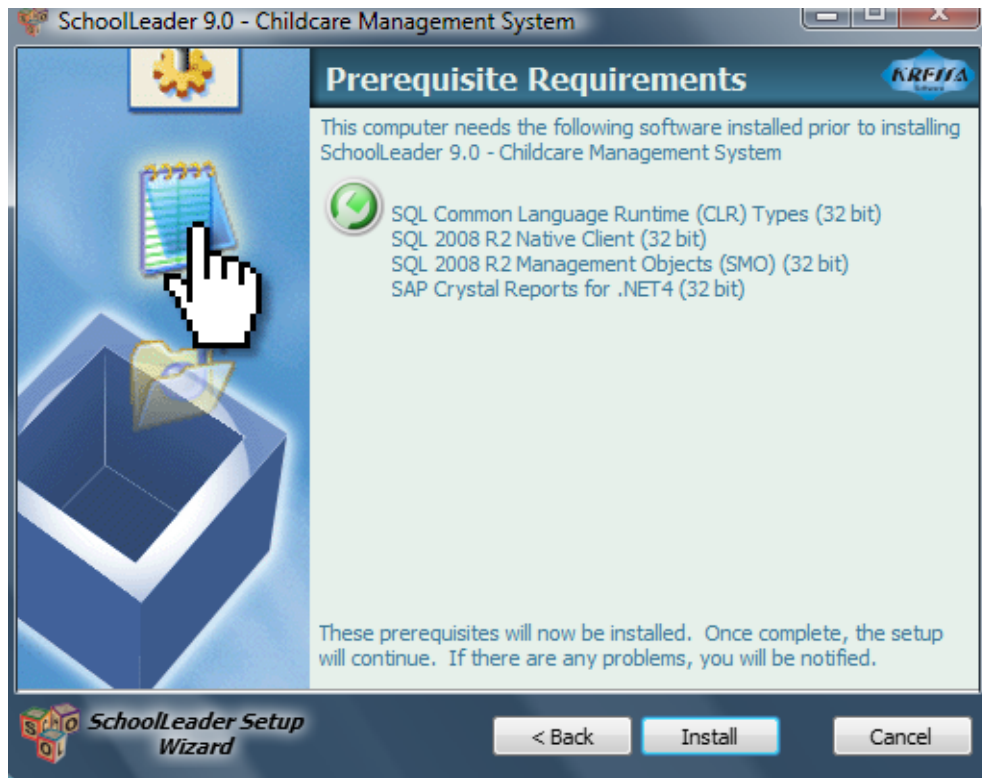


The wizard is now ready to begin the installation. Click **Install** when you are ready to begin

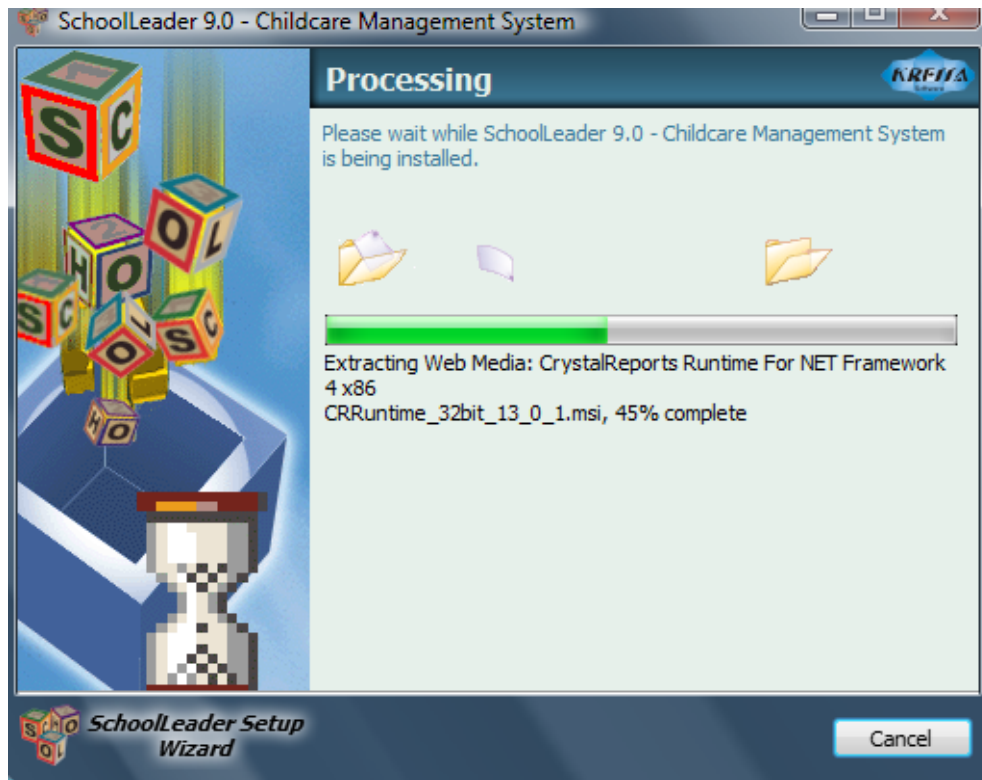
The installation process will first scan your computer for any needed prerequisite software needed. During this step the “Checking computer for requirements” window shown below will be displayed. This may take several minutes. Do not interrupt this process.



Doing your *Windows Updates* will result in most prerequisite software being installed, however, there are several more optional components not related to Windows or SchoolLeader that must be installed before proceeding. The installer will identify these items and display the prerequisite requirements in the window below. If none are needed, this window will not display and you can proceed to the next step.



Note: this list of items shown above is for display purposes only. Your window may show different items. Regardless of the items in the list, there is nothing extra for you to do. Click **Install**.



While the software is being downloaded and installed, you will see a progress window like the one above. Do not cancel unless you realize you have made a serious mistake and must abort. This step can take anywhere from 10-30 minutes depending on the features you selected and the speed of your internet connection.



The SchoolLeader workstation software has successfully installed. Click **Finish**.

The **Web Updater** software will now be installed. Click **Finish**.

REBOOT THE PC before using SchoolLeader programs.

ENSURE CONFIGURATION SETTINGS ARE ALL CORRECT

Run the SchoolLeader “DBRescue” tool now from each workstation. This cleanup and repair tool ensures all configuration settings are set up correctly. A shortcut has been created on the desktop of this computer titled “SchoolLeader DB-Rescue”. It shows a picture of an ambulance.

- **Right click** on the DBRescue shortcut and select “*Run as Administrator*” from the menu

