

O C T O B E R 2 0 0 7

# the **principalm** news for Lifetouch Reps

ISSUE #2

## ✧ New Release – v7.2 ✧

*The past few months have been very exciting here at Discovery Software. We've released Principalm v7.2 which improves the user interface and now tracks Student Conduct. We're also including a new program called LearnFaces as part of the Principalm package.*

### **New Principalm v7.2 Features:**

- ★ the Discovery Connect program that comes with Principalm can let us know if a school is successful at uploading data to Principalm. If not, we'll call them.
- ★ we've added Student Conduct (with incidents and outcomes). This is a bigger feature than it at first appears because a discipline incident often involves multiple students which requires a lot of cross-linking of data.
- ★ there's an improved and cleaner-looking user interface.
- ★ use the 4-direction joystick pad to navigate through screens with one hand! This enables Principalm to work on some of the new Windows Mobile smartphones that don't have touch screens.
- ★ there's more and better medical information (conditions and history).
- ★ grid elements that are not hyperlinks expand to show additional information when clicked.
- ★ use the thumbwheel (or the buttons that normally control volume on a Treo) to scroll from student to student quickly. There's also a Button Setup option in the Edit menu to define the function of any other available hardware buttons.
- ★ when a phone number is selected, a dialog now appears that lets the user modify the number (e.g. add or remove area code, etc.) before dialing.
- ★ if the handheld supports sending emails, you can do it right from within Principalm now.
- ★ to make password entry easier, we've reverted to the 0-9 digit keypad. This is great for people who don't want to have to use the shift key while entering passwords such as "fred241dy". Of course, if you prefer a full keyboard, that's available too.



### *LearnFaces*

*LearnFaces is a simple concentration style game that helps administrators recognize each student by name. When students lose their anonymity, there are fewer discipline incidents and usually better attendance and higher grades.*

*Plus, using student pictures in this way reinforces the value of Lifetouch School Portraits!*



*Principalm is a product of  
Discovery Software Ltd.*



### **Contents**

- 1) New Release - v7.2
- 1) LearnFaces
- 2) How Principalm Works
- 2) The Renewal Process
- 3) Learn More (training)
- 3) Hardware Recommendations
- 3) Free SD Cards!
- 4) Contact Information, White Papers

"Thanks so much – as always, you guys make us look SO good to our customers! I hope you know how very much we appreciate the excellent service you extend to our schools. Thanks again!"

**Jan Younce, DG Territory, 07May07**

## How Principalm Works

*Maybe you don't need to know this – that's okay, and it is a bit technical. But it might just be useful... and we do include a nice diagram.*

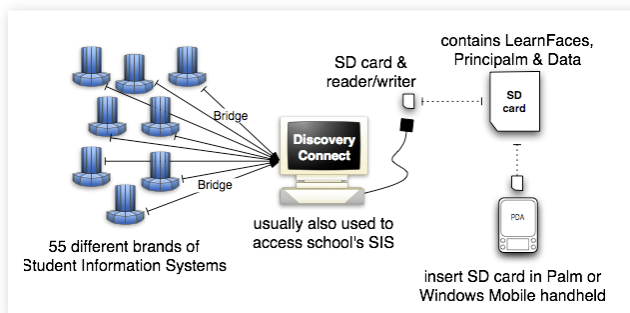
### OVERVIEW

Now that we've introduced LearnFaces, it's a good idea for you to understand the bigger picture. This means you need to learn about Discovery Connect.

### DISCOVERY CONNECT

As you know, Principalm displays information from a school's SIS (Student Information System) on a handheld. This is extremely useful, because it means the school's administrators can get out of the office but still have all the information they usually access via their desktop computer.

What you may not know is that there are lots and lots of SIS's. We didn't want Principalm to have to know how to work with so many SIS's, so we invented Discovery Connect and include it with every copy of Principalm.



Discovery Connect knows how to get student and teacher information from the myriad SIS's on the market and store that data in a standard form. This means that as far as Principalm is concerned, there's only one SIS to worry about! Because Discovery Connect has to communicate with a school district's SIS setup, it is usually a good idea to get the district IT department involved; they hate surprises!

"Thanks for taking care of the licensing issues in such an efficient manner. It's been a pleasure to deal with you and Discovery Software has provided the best technical support that I've ever experienced. You can promote this product with confidence.

Sincerely, Tom Lockwood  
Technology Director, Hemlock Public Schools"

## The Renewal Process

With the new school year well under way, it is time to get ready for the next step in the Principalm/Lifetouch year – **January renewals**. Renewals work very differently from original purchase orders – among other things, they're less expensive! The timeline is:

- 1) Sometime around the **first week of November**, each territory manager will receive their January renewal form for all the Reps in their territory. This form has three components to it:
  - current renewals (expiring January). You need to let us know which schools you want to renew.
  - past expiries (expired in July or earlier). You have one last chance to renew these schools.
  - a list of schools with active licenses. These licences expire next July; you don't have to do anything about them at this time.
- 2) Simply print out a copy of the form and fill it out. If you choose to renew for a school, you'll need to confirm which platform(s) they will need. If you choose not to renew for a school, please take a moment to indicate the reason in the space provided.
- 3) Fax the form back to Kate at 604-532-5850. Licenses **STOP WORKING** on January 1st, so fax your form in as early as possible to avoid interruption to your schools.
- 4) That's all you have to do – we'll take care of it from here. We will start sending the new license keys out as of December 1st, and will invoice Lifetouch in January.

**NOTE:** Make sure you want to renew for a school before sending us the form! Once we have sent a license key there is nothing we can do to "take it back."

If we have not heard back about your renewals by February 1st, we will begin to contact schools independently to find out if they'd like to renew directly with Discovery Software.

## Free SD Cards!

Would you like a **free** SD card that will work in both Palm and Windows Mobile handhelds and contains both LearnFaces and Principalm v7.2? If so, just send an email to [lifetouch@principalm.com](mailto:lifetouch@principalm.com) and we'll send you one.

So what's the catch?

- this is only for Lifetouch Reps and Territory Managers, so they can demonstrate Principalm to potential clients.
- you must supply your own handheld device.
- you need to attend one of our free on-line *What is Principalm?* seminars. They are arranged at your convenience; just give us a call to set a time.

## Learn More...

The more you know about Principalm, the better you can use it to help increase your school photography sales. With this in mind, Discovery Software is offering free (and fairly short) sales seminars specifically for Lifetouch Staff. Contact **Kate Howerton** to schedule an appointment.

We work around your schedule; just contact us to set a time that works for you. They're given over the internet, so all you need is a telephone and a computer with a fairly modern web browser.

Here's the typical outline:

- ◆ architectural overview: the difference between Discovery Connect and Principalm.
- ◆ quick demo: see the latest version of Principalm and LearnFaces in action.
- ◆ the Lifetouch/Discovery process: how to order, how renewals work, what we send to your customer, what we'd like in terms of feedback, licenses, dual platform.
- ◆ appropriateness: will it work for a given school, SIS compatibility?
- ◆ sales points: how to make schools understand how Lifetouch is helping them, getting the district IT department on your side, etc.
- ◆ access to additional materials.

The entire session takes between 45 to 60 minutes.

"Principalm is not only up and running, but is annoying our children to no end! Common complaints include things like "those palms aren't fair" and "why are you always catching me." :)"

Regards, Pete Hutchison  
Amityville Memorial High School  
21Mar2007

## Hardware Recommendations

A common question we get here are Discovery is: "What handheld device should the schools use?" Unfortunately, the answer isn't the same for everyone...

### **SmartPhone or PDA?**

The first question is whether you should get a PDA or a SmartPhone. The advantage of a SmartPhone is that you only need one device; people only have two hands so having both your phone and your student information in one device can make things simpler. Plus, we're going to be adding more and more phone features to Principalm over time (you can already just click on a phone number to dial). So most of the time it's best to get a SmartPhone.

However, there may be some users in the school that only have need for Principalm for a short time (for use at football game admission gates, lunch supervision, field trip or hall monitoring). For these people, a regular PDA is fine and at this moment the Palm TX is a highly recommended device.

### **But isn't a SmartPhone expensive?**

If you don't believe in phone contracts and always buy your own phone so that you're not under the thumb of the telephone company and can easily switch at a moment's notice, then a SmartPhone can be expensive. However, if your customer is comfortable with 2 year phone plans then a Treo 700wx or 755p can usually be had for \$199 or so. If your LT territory includes a handheld when they supply Principalm (which some do for larger schools), consider paying for a SmartPhone attached to their cell plan. This can actually be less expensive than buying a PDA!

### **Palm? Windows Mobile? BlackBerry? iPhone? What Works?**

Since the industry changes so quickly (and since we therefore know this newsletter will go out of date), we suggest these rules of thumb for the next 6-12 months:

- Palm and Windows Mobile devices work fine, if bought new in the past couple of years.
- We do not currently support the BlackBerry or iPhone.
- If in doubt, contact [lifetouch@principalm.com](mailto:lifetouch@principalm.com) and ask for the latest update.

### **What about Screen Size?**

With a bigger screen, Principalm displays more information. While Principalm works on small screens, we recommend at minimum a 240x240 (Palm 700wx, running Windows Mobile) or 360x360 (Palm 755p running Palm OS) screen. If your screen is bigger than this, so much the better.

### **Memory Capacity? How much do they need?**

We store the data on an SD card (or miniSD or microSD), and they're available with plenty of capacity. Thus, the internal memory of the handheld is not usually critical, although more is always better. We have one district that puts 65,000 students on a 4GB SD card! Note that some handhelds put the SD memory card under the battery, which can be inconvenient.

### **Anything Else?**



Principalm will work with either a touch screen or with one of those 4-directional cursors. While your choice of handheld is mostly personal preference, most people prefer using Principalm with a touch screen. Similarly, users seem to prefer a device with a keyboard (as opposed to using their stylus to enter text). Having a touch screen and a keyboard reduces the learning curve to minutes or even seconds.

### **The Programmers Suggest...**

We asked the programmers, and they like:

PDA only: Palm Tungsten TX or any HP iPaq  
cell phone too: Palm Treo 750p or UTStarcom PPC6700/PPC6800

W H O T O C O N T A C T

<i>Kate Howerton</i>	<i>Chad Zimmerman</i>	<i>White Papers</i>
 <p>Kate Howerton's entire existence at Discovery Software (well, most of it anyway) revolves around helping Lifetouch Reps. Need help with a demo to a big client? Have problems processing an order? Have a customer that needs special care? <b>Call Kate!</b></p> <p>email) <a href="mailto:lifetouch@principalm.com">lifetouch@principalm.com</a> tel) 1-888-569-7711 x2296</p>	 <p>Chad Zimmerman is Director of Marketing and Strategic Initiatives at Lifetouch. This includes 3<sup>rd</sup> party relationships such as the one with Discovery Software.</p> <p><b>Call Chad</b> if you have questions about Lifetouch policies, billing, etc.</p> <p>email) <a href="mailto:czimmerman@lifetouch.com">czimmerman@lifetouch.com</a> tel) 952-826-4860</p>	<p>There's so much left to say – we'll have to write a longer newsletter next time! In the meantime, contact Kate Howerton if you'd like her to send you any of these informative documents on specific topics:</p> <ul style="list-style-type: none"> <li>*<b>The Big Picture</b> - more info than this issue's "How Principalm Works"</li> <li>*<b>Data Security</b> - how we keep student data safe</li> <li>*<b>Principalm v7.2</b> - gory details of what's in v7.2</li> <li>*<b>Bridge List</b> - list of how well Principalm works with a particular Student Information System</li> <li>*<b>Price List</b> - how much Principalm costs, renewal pricing</li> </ul>

"I use it most every day and consider it a necessity for my job as a high school principal. It also allows you to carry information to after school events for emergency situations. If other administrators are interested in seeing it they can give me a call or e-mail me."  
 - Tom Dykstra from Byron High School, MI



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