SK Check-In – Network Help Sheets-Server and Workstation Installation

This is a GENERAL Servant Keeper Check-In Network Installation help sheet. If you need further assistance, please contact your network administrator.

<u>Due to the uniqueness of each network,</u> we cannot be responsible nor will we support the installation of Servant Keeper Check-In on your network by anyone without the network administrator or a person with adequate networking knowledge available.

This instruction sheet is used to install Servant Keeper Check-In on a network. For installation purposes, the main computer that will contain the Servant Keeper Check-In data will be referred to as the **"Server"**. The computers that access the Servant Keeper Check-In data from the Server will be referred to as **"Workstations"** or **"Kiosks"**. This instruction sheet assumes that Servant Keeper 6 is already installed and configured properly on your network.

IT IS VERY IMPORTANT TO KNOW WHAT VERSION OF WINDOWS YOUR COMPUTER IS CURRENTLY RUNNING BEFORE YOU BEGIN YOUR SERVANT KEEPER INSTALLATION!!

If you do not know what version of Windows your computer is running, follow the instructions below:

1. Right click on your My Computer or Computer icon on your desktop.

If you do not have this icon on your desktop, you can find it by clicking on your Start button. It will be listed there.

2. Click on Properties. You will see a window that will display the version of Windows that this computer is running.
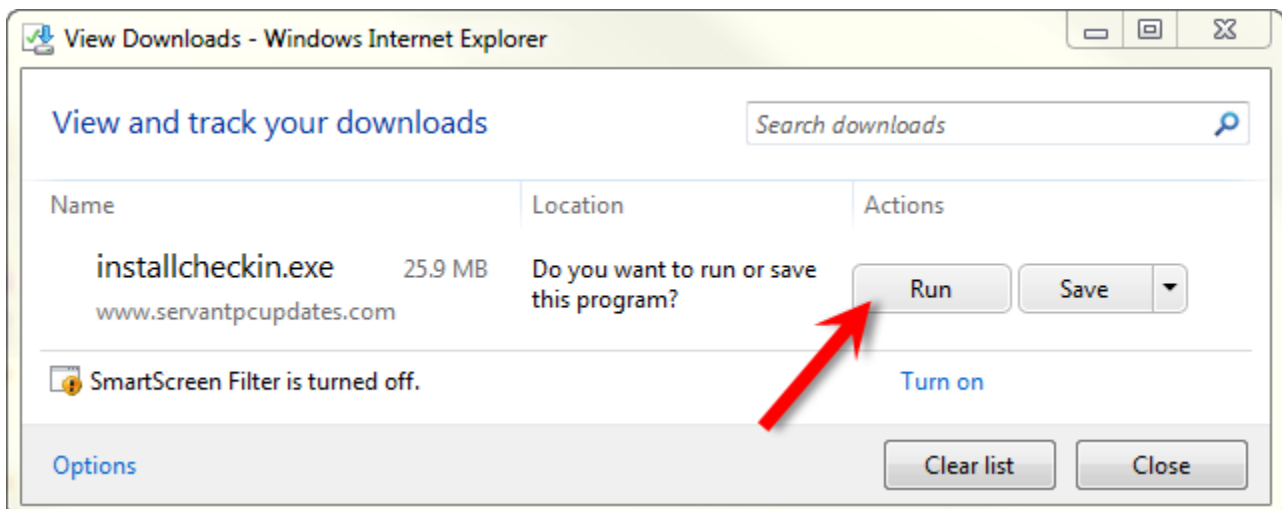
Step 1 – Server Installation:

1. Open the Check-In installation email that you received and click on the first link.
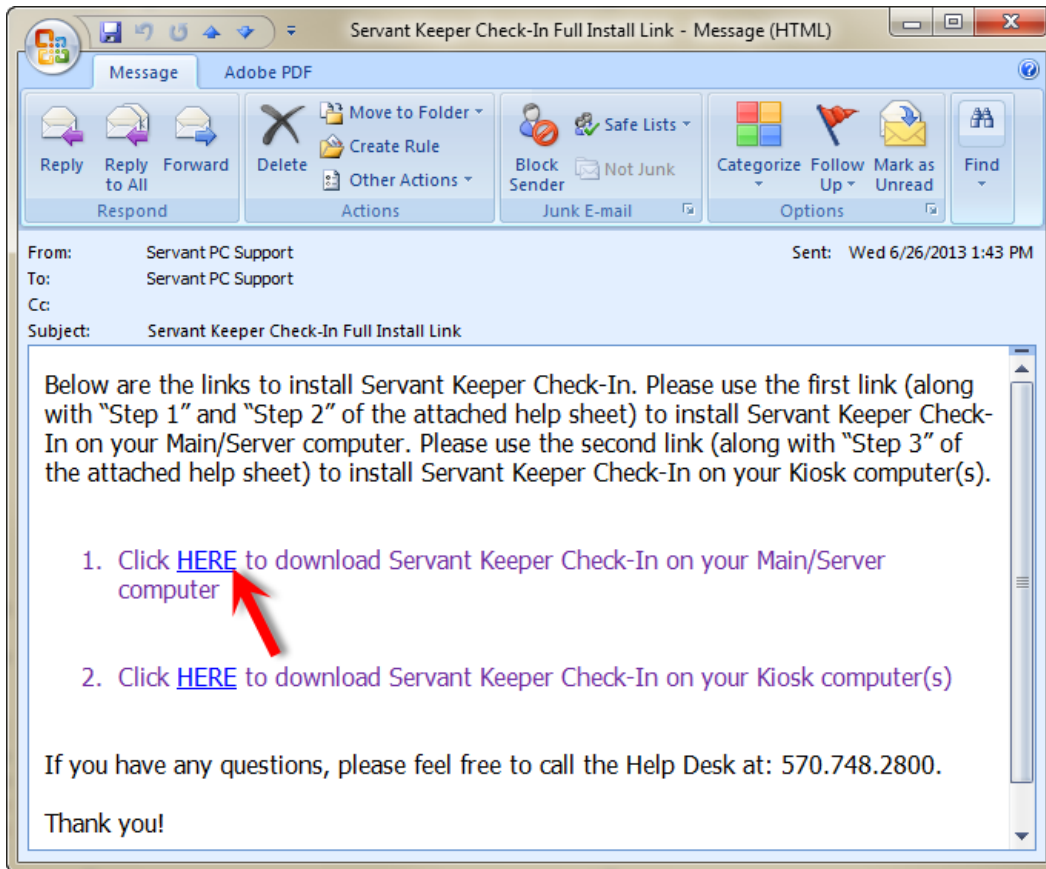

2. If your "Downloads" window opens, click the **[Run]** button to run the application.
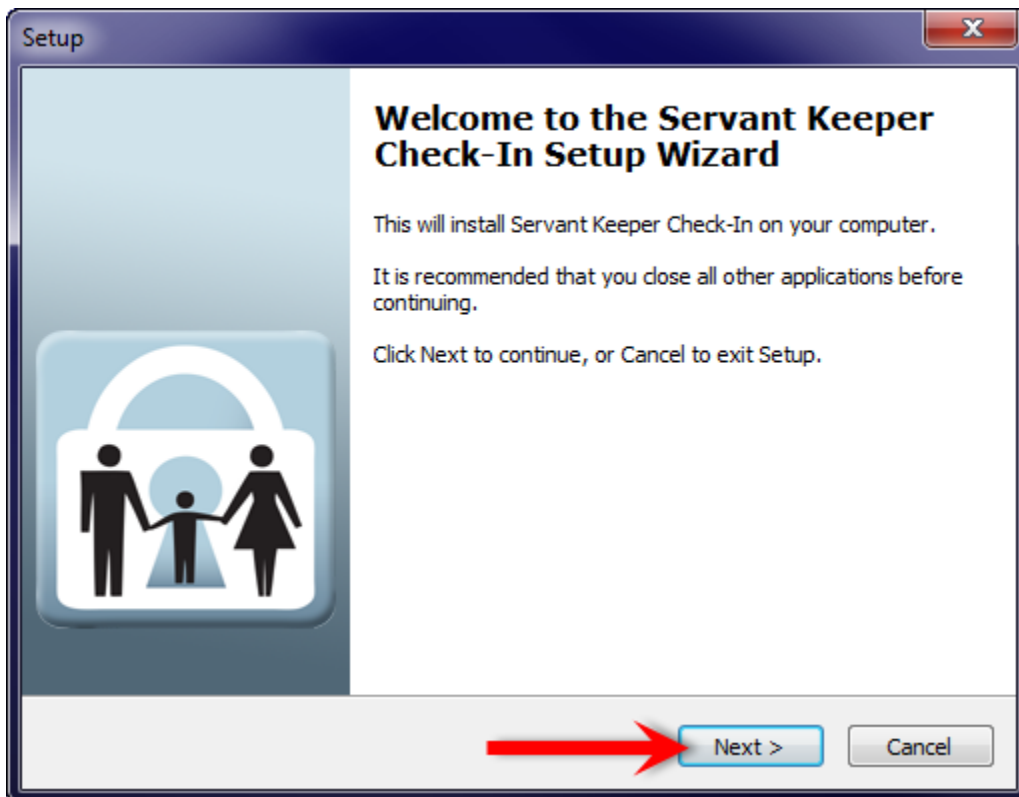
   Note: The way that you run the application depends on your computer's settings. If you are unsure how to run the download on your computer, please consult your administrator.
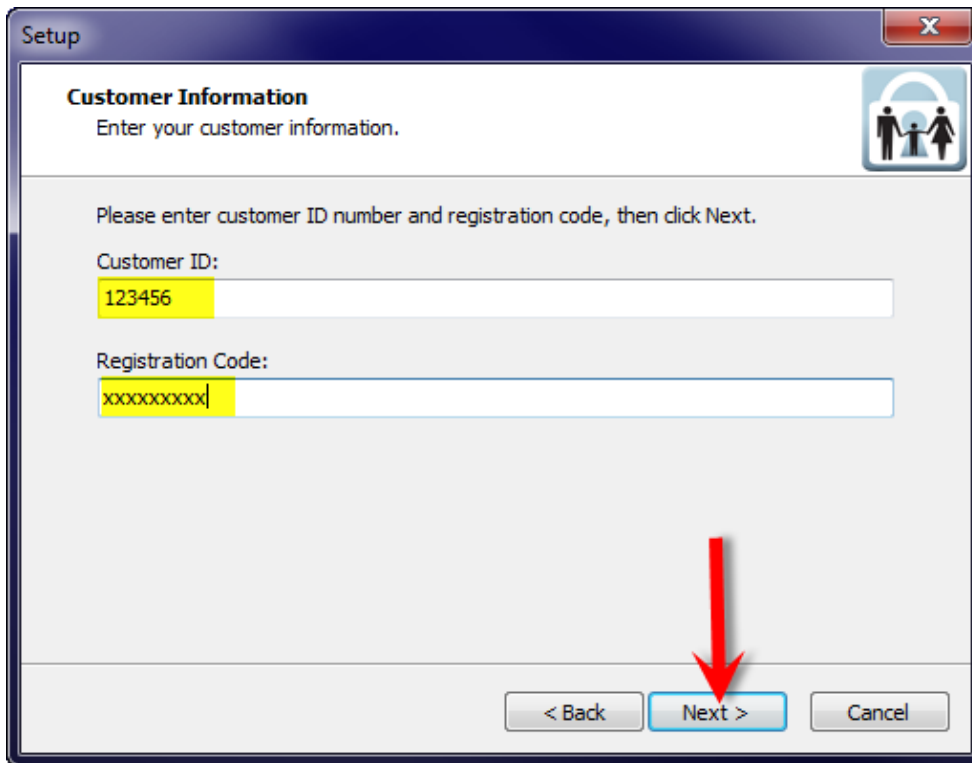
3. When the Check-In installer finishes downloading, you may be prompted to "Run" the application again. Click **[Run]** to proceed.
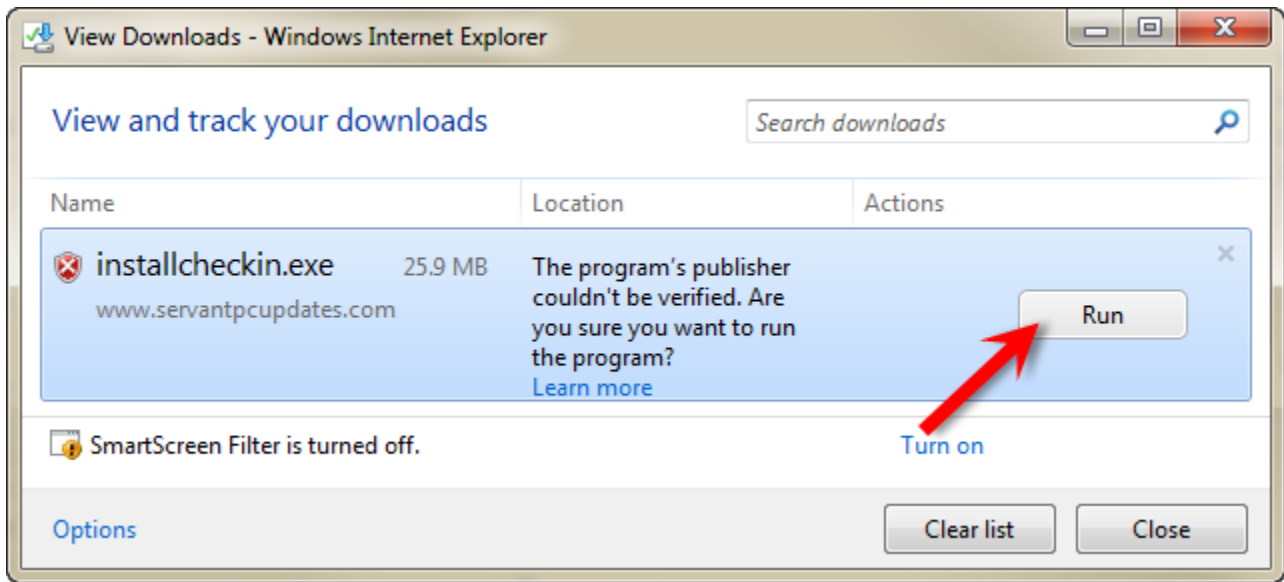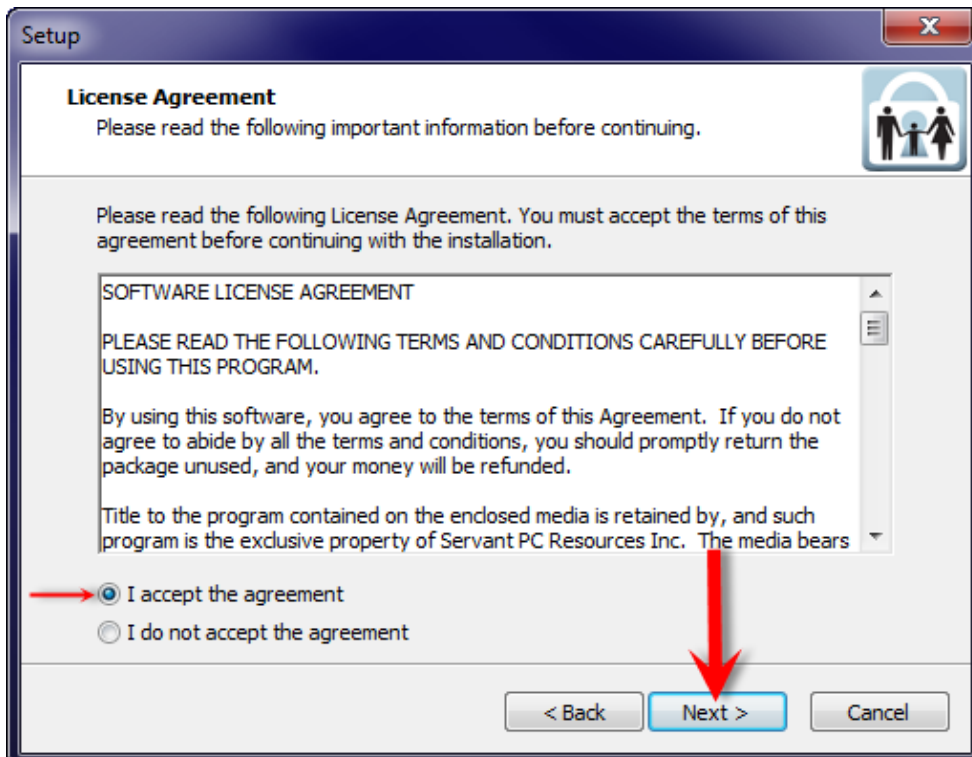

4. You will now see the "Setup" window open to the "Welcome" screen. Click **[Next]**.

5. You will be prompted to enter in your Customer ID number and Registration Code. Fill in both fields and then click **[Next]**.


6. After reading through the License Agreement, select "I accept the agreement" and click **[Next]** to continue.
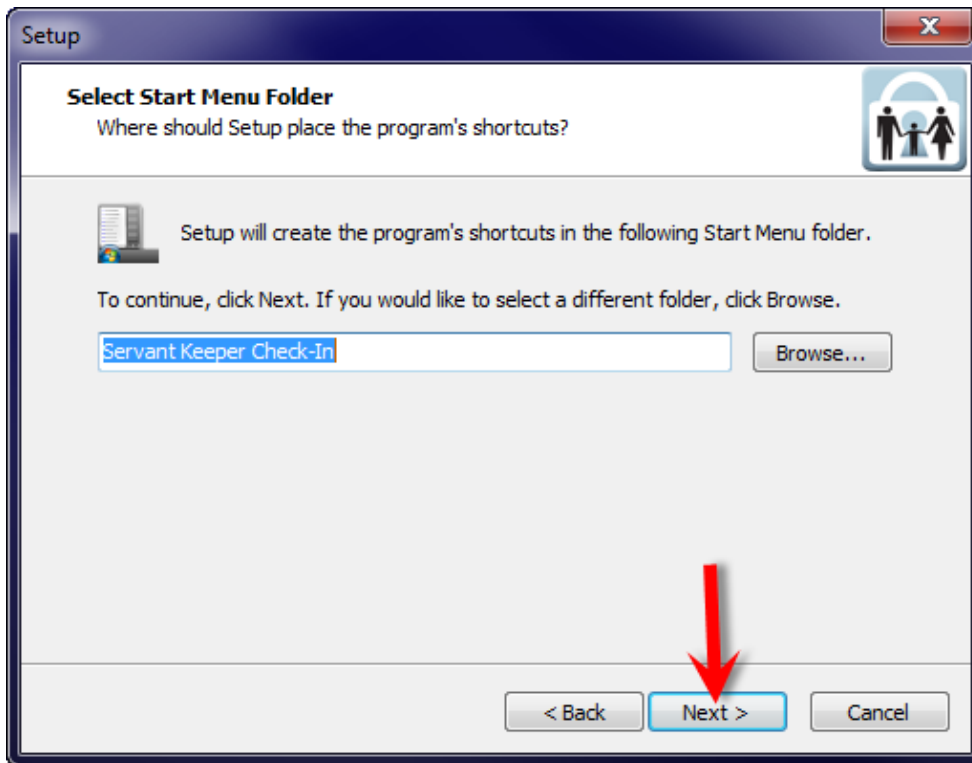
7. You will now see the Servant Keeper Check-In Release Notes. This is a list of things that have been changed in the latest update. After reading the release notes, click **[Next]**.
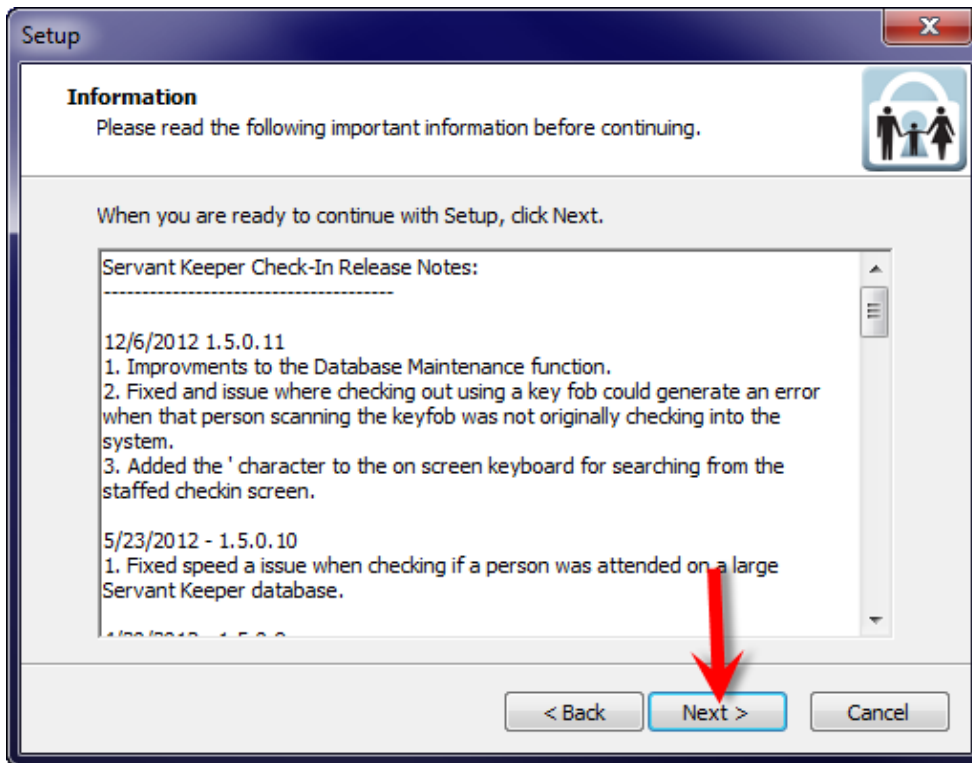

8. You will be asked to select a Destination Location for SK Check-In. The default installation location is "C:\Servant Keeper Check-In". Click **[Next]** to continue.
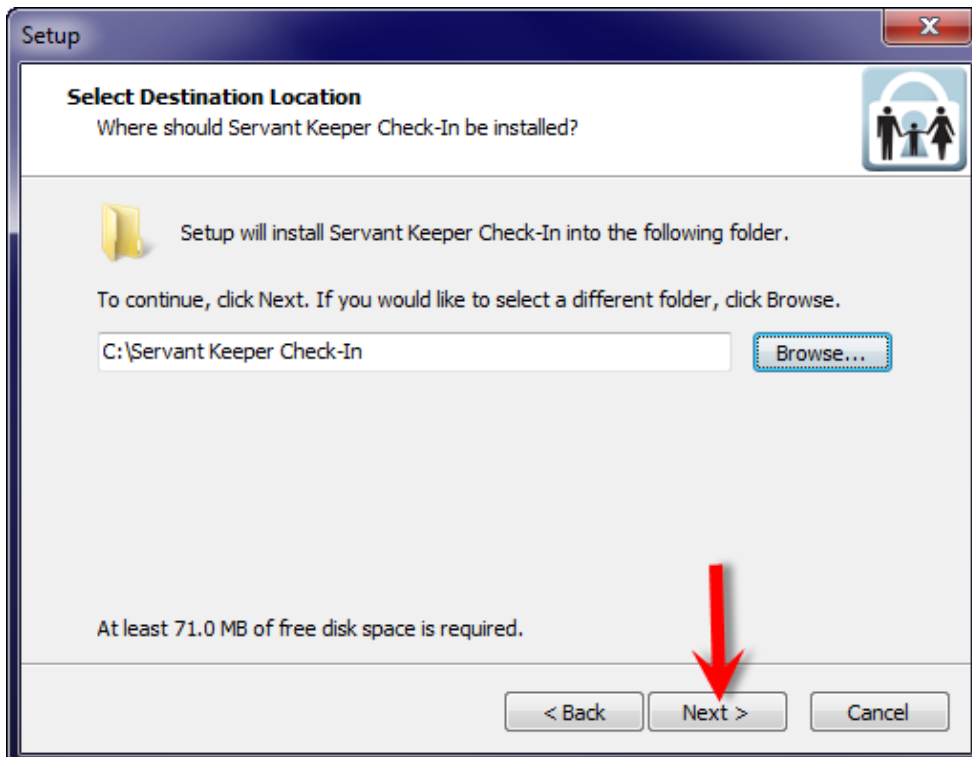
9. Next, you will be asked where you would like to place the program's shortcuts. By default, the program will create a "Servant Keeper Check-In" folder of shortcuts on your Start Menu. Click **[Next]**.


10. Your Servant Keeper Check-In is now ready to install. Click the **[Install]** button to begin.
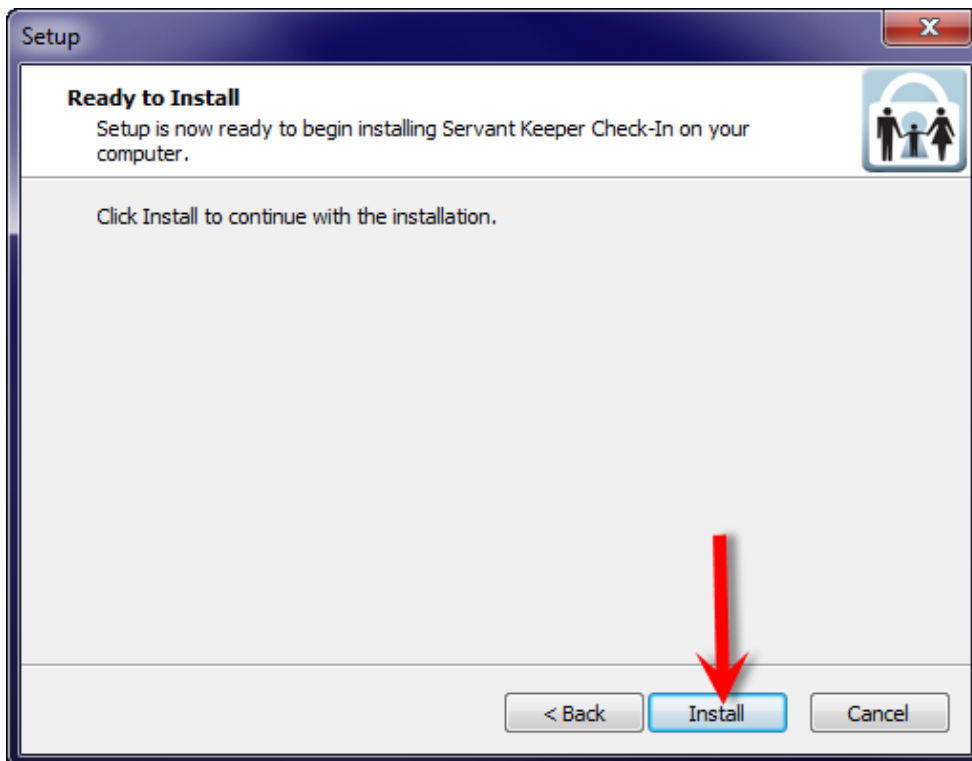
11. You will see a progress bar as your Check-In program installs. When your installation completes, you will be taken to the next step.
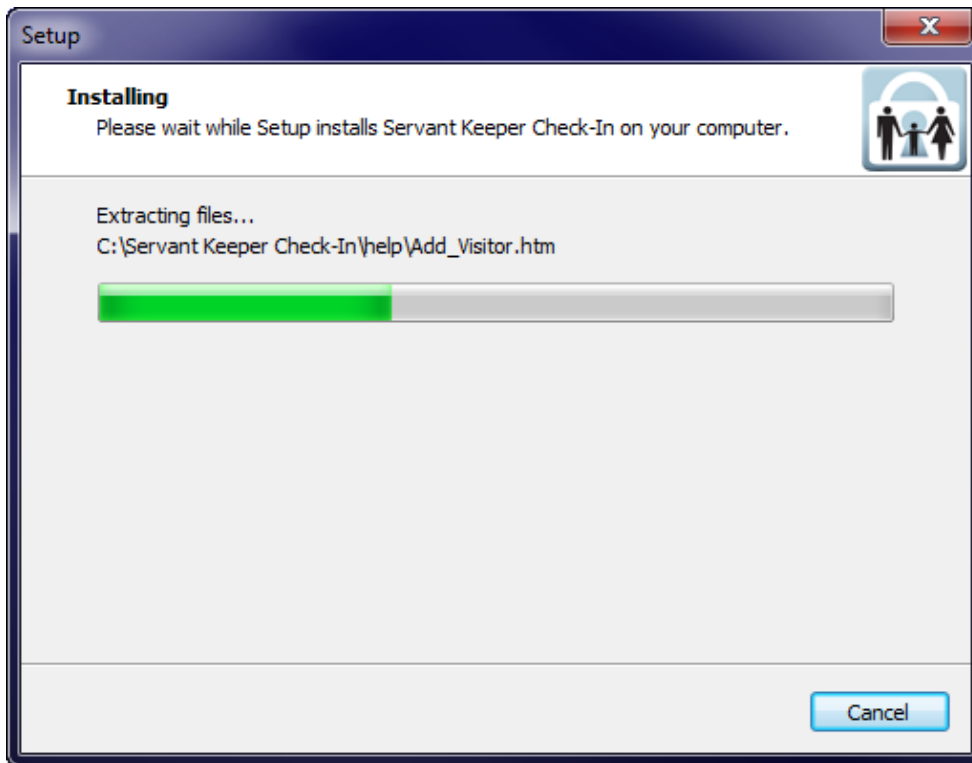

12. You may see the "Servant Keeper Check-In Quick Start Guide" open on your screen. This guide will help you as you begin working in your Check-In program. Click the minimize button to hide the window for now. When the entire installation process has completed, you will want to go back and read through the Quick Start Guide.
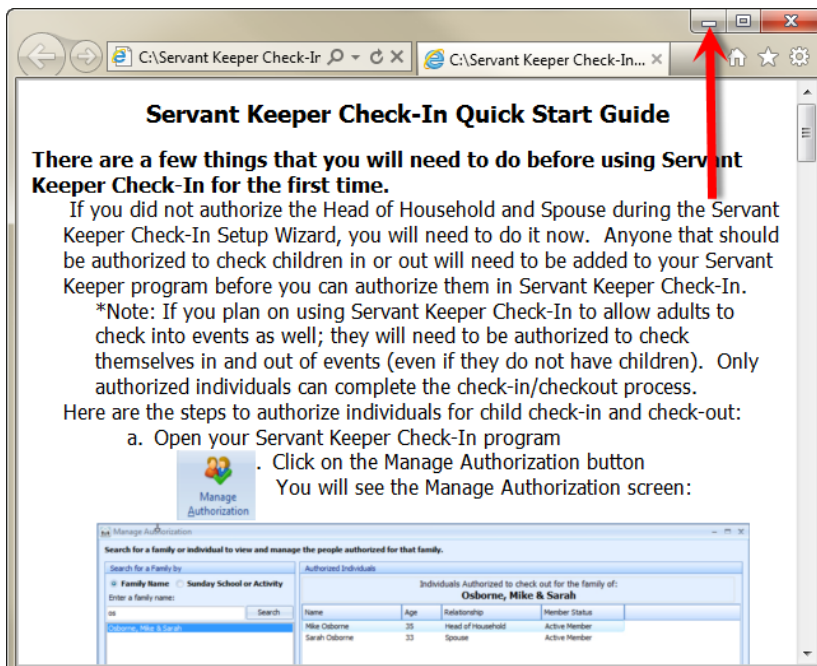
13. At this point in the installation process, you will see the "Servant Keeper Check-In Web Update" window appear. If there is an update available, click **[Download and Install Update].**
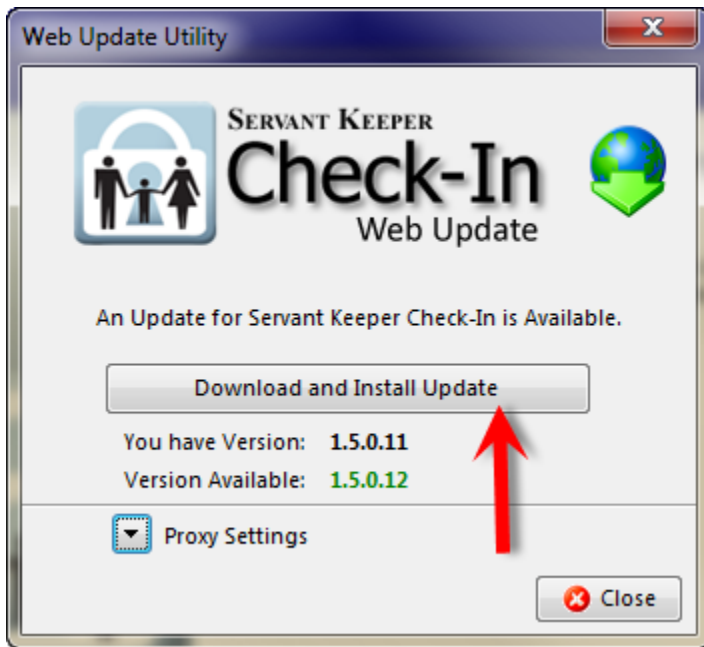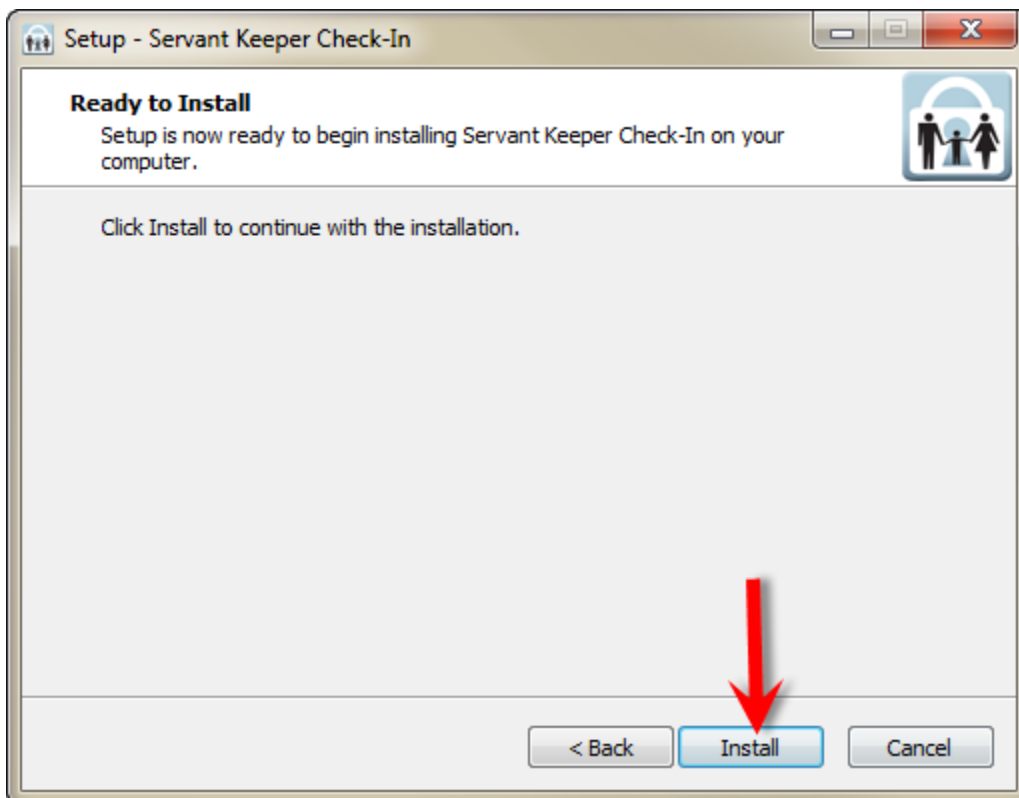

14. Your Check-In Update will begin downloading. When it is complete, you will be taken to the next step.
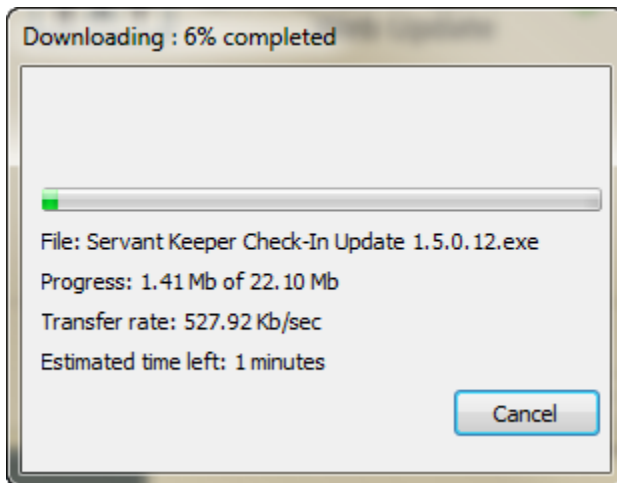
15. You will now see the "Welcome" screen to another Setup Wizard. This Setup Wizard will install the latest update(s) for the Check-In program. Click **[Next]** to begin.
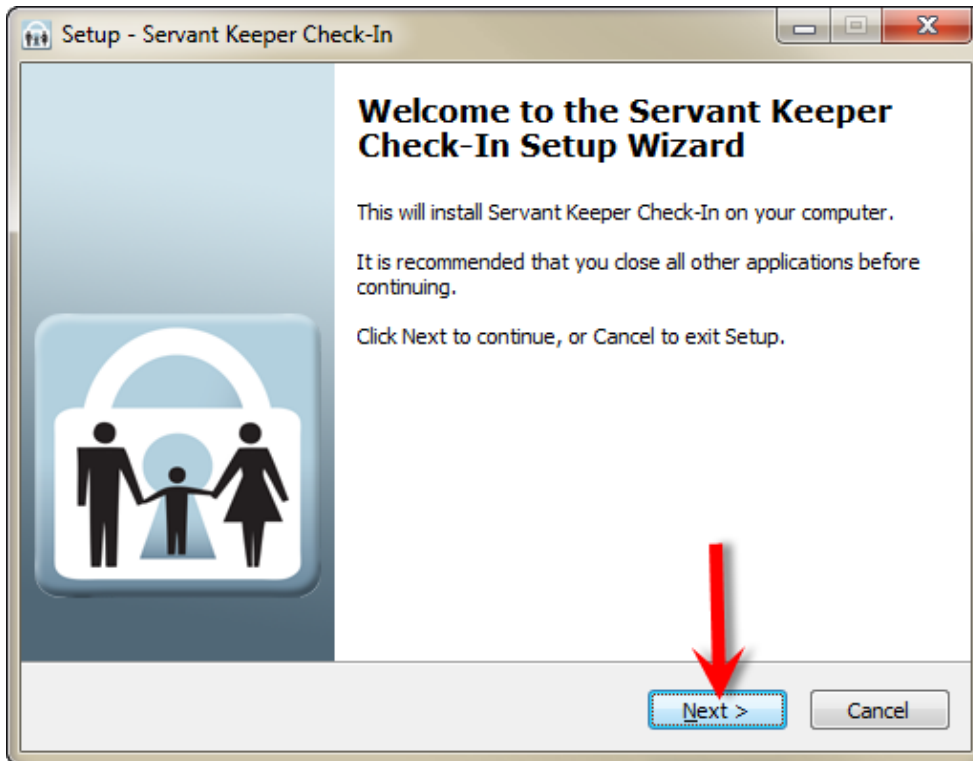
16. Now you are ready to install the update(s). Click **[Install]**.

17. You will see your Check-In update(s) install. When it is completed, you will automatically be taken to the next step.
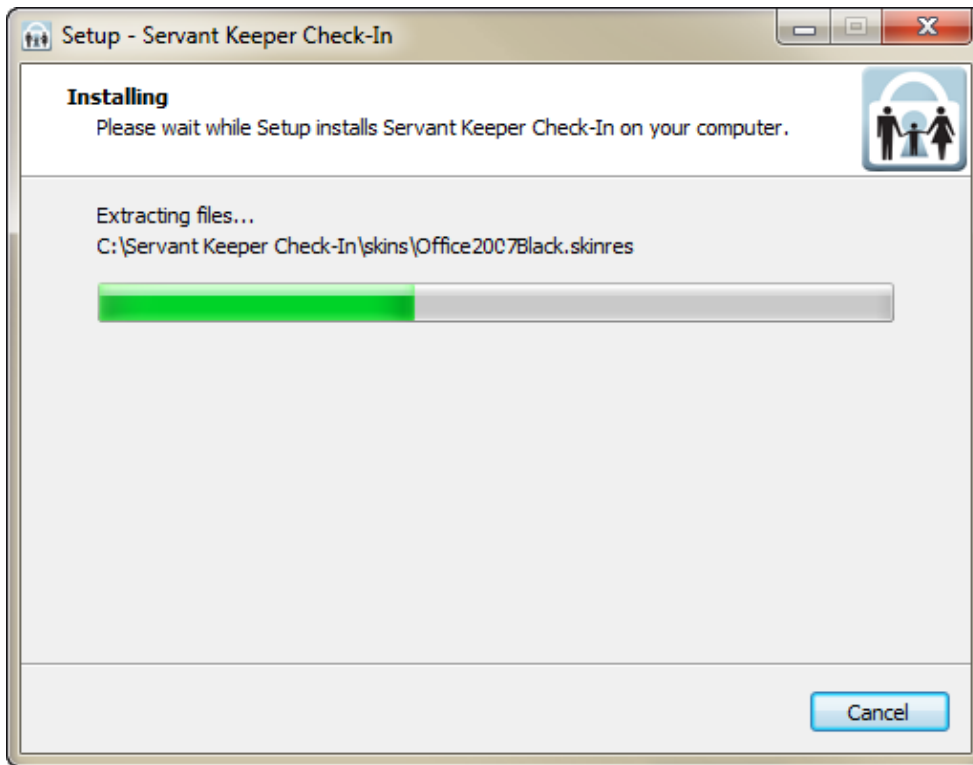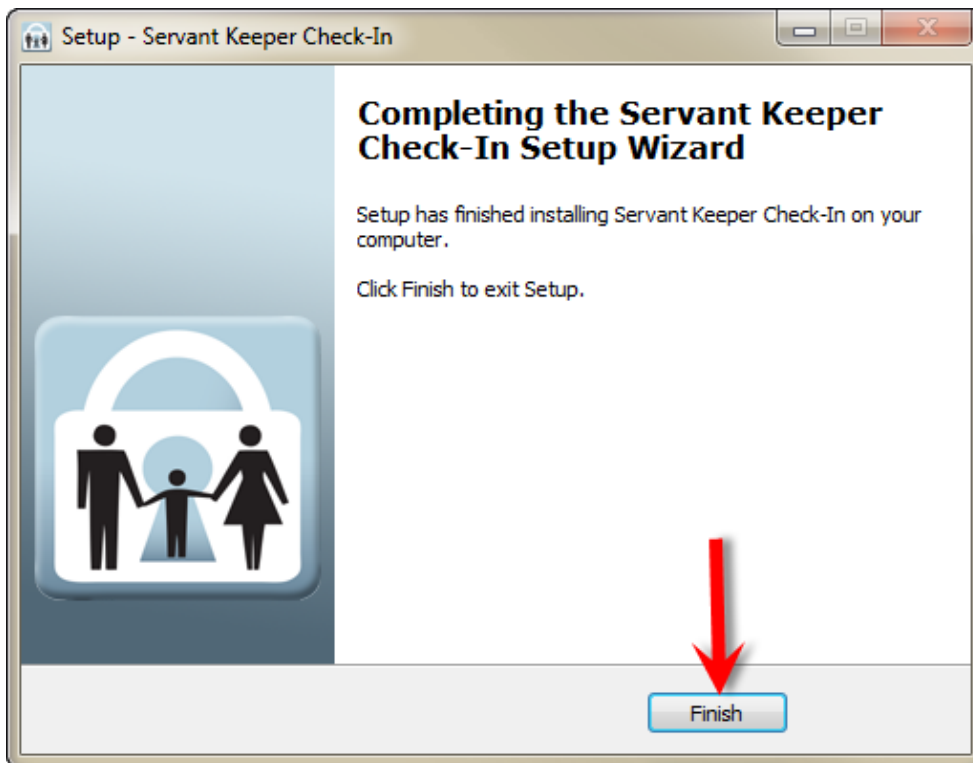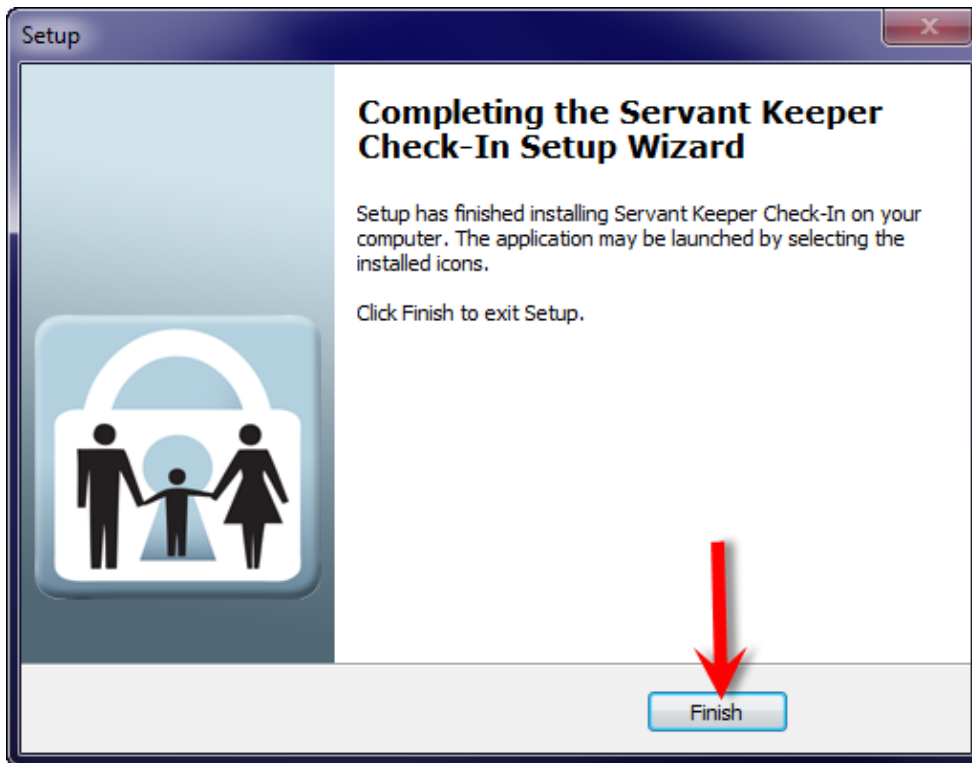

18. Your Check-In update(s) are now done installing. Click **[Finish]** to exit the Check-In Web Update Wizard.

19. The Servant Keeper Check-In program is done installing on your computer. Click **[Finish]** again to close out of the Installation Setup Wizard.

20. If you look on your desktop screen, you should see a new "Servant Keeper Check-In" icon. Double-click on the icon to launch the "Check-In Setup Wizard".
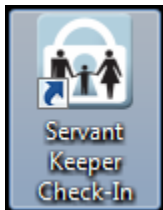

Note: Before you continue, make sure to plug in (and, if necessary, install the drivers for) any approved devices such as the magnetic strip reader, barcode scanner, or thermal label printer. If you do not wish to add your peripheral devices at this time, you will have the opportunity to add them to the program at any time after it is installed by going into the Check-In System Options.

21. You will see the Welcome to the Servant Keeper Check-In setup wizard window. This wizard will guide you through the initial setup process for Servant Keeper Check-In. Click the **[Continue]** button to proceed to the next step of the setup wizard.

22. You will now see Step 1 of the wizard. In this step you will need to click **[Browse]** or **[Search for Servant Keeper]** to find and select your Servant Keeper 6 database. When a valid "Servant Keeper 6" folder has been selected, you will see a message saying "The folder contains a valid installation of Servant Keeper". Click the **[Continue]** button on proceed to the next step of the wizard.
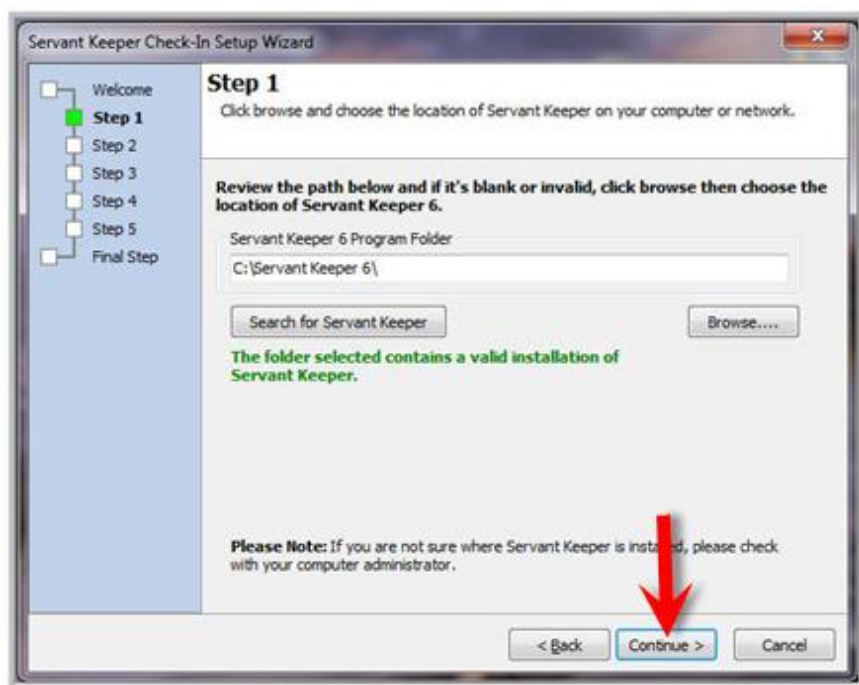
23. In Step 2, you will connect your Servant Keeper Check-In program to the Servant Keeper Check-In database. Review the path that is displayed. If it is blank or invalid, click the **[Browse]** button and find the location of your Servant Keeper Check-In database file.   The default location is "C:\Servant Keeper Check-In\db\CheckInV1.ck1db". Click the **[Continue]** button to proceed.
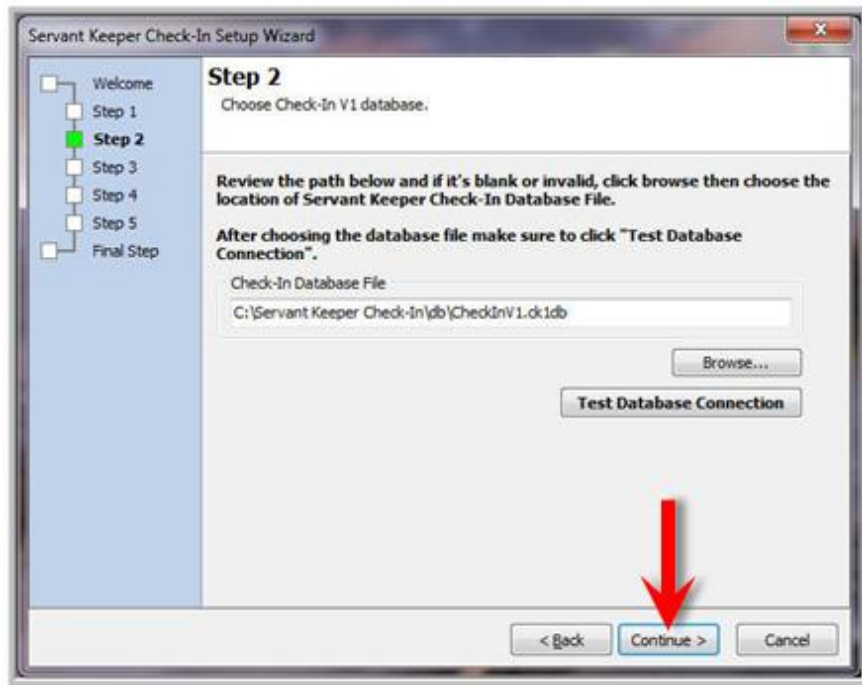
24. In Step 3, you will choose from the list of Servant Keeper users which users you would like to transfer to your Check-In program. This will allow the selected users to use their SK User ID and Password to log into the SK Check-In program. Untag any users that you do not want to import and click **[Continue]**.
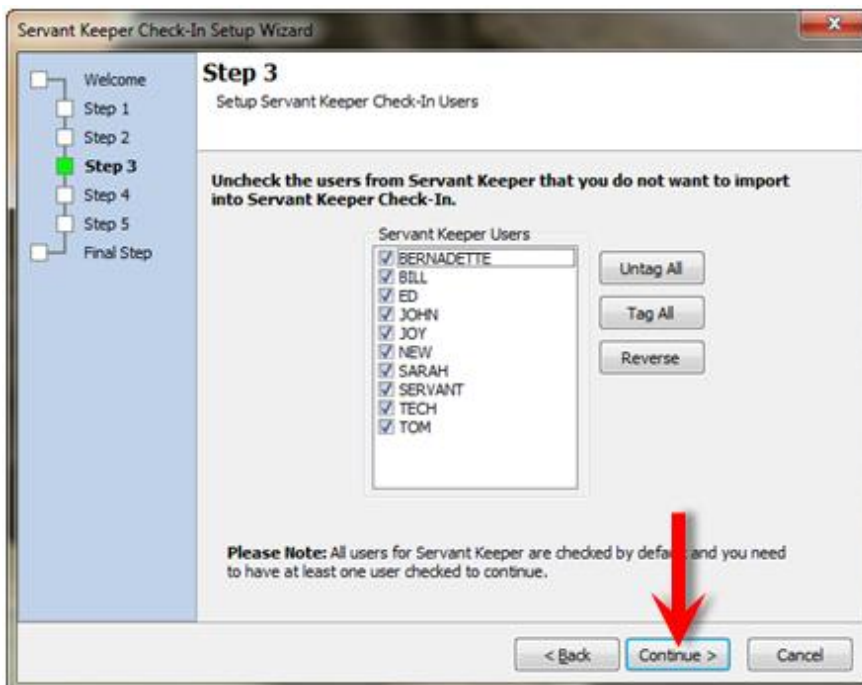
25. In Step 4, you have the option to authorize all head of households and spouses in each family. If you check this box, it will allow the head and spouse in each family to check in & out the members of their family. If you uncheck this box, you will have the option to manually authorize one family at a time.
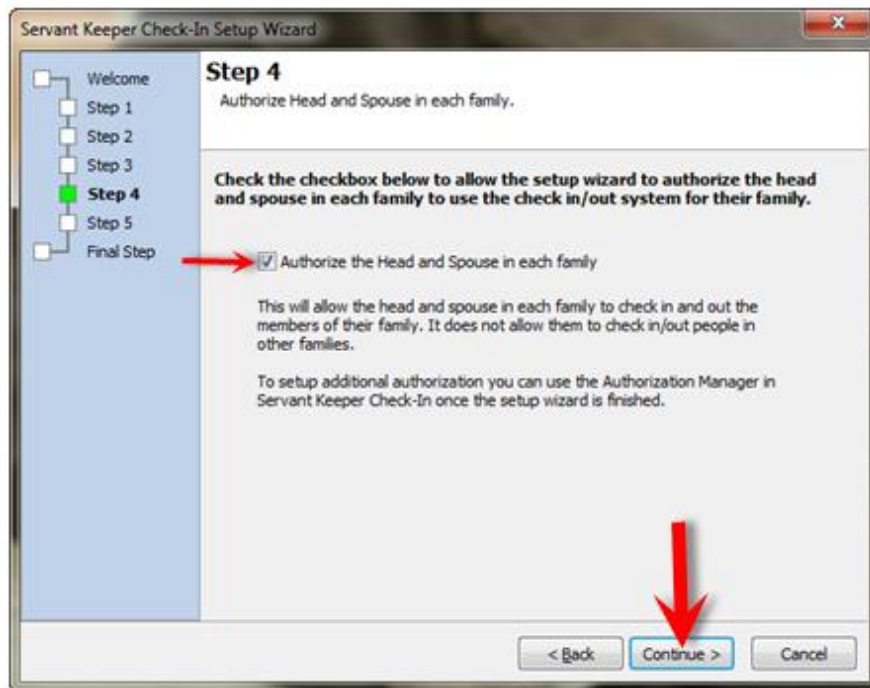

26. Step 5 gives you the options to choose the devices that you would like to use with Servant Keeper Check-In. If you already have a USB Barcode Scanner, USB Magnetic Strip Reader, and/or a Printer installed, you can select it/them at this time. After you have selected the appropriate options, click **[Continue]** to proceed.
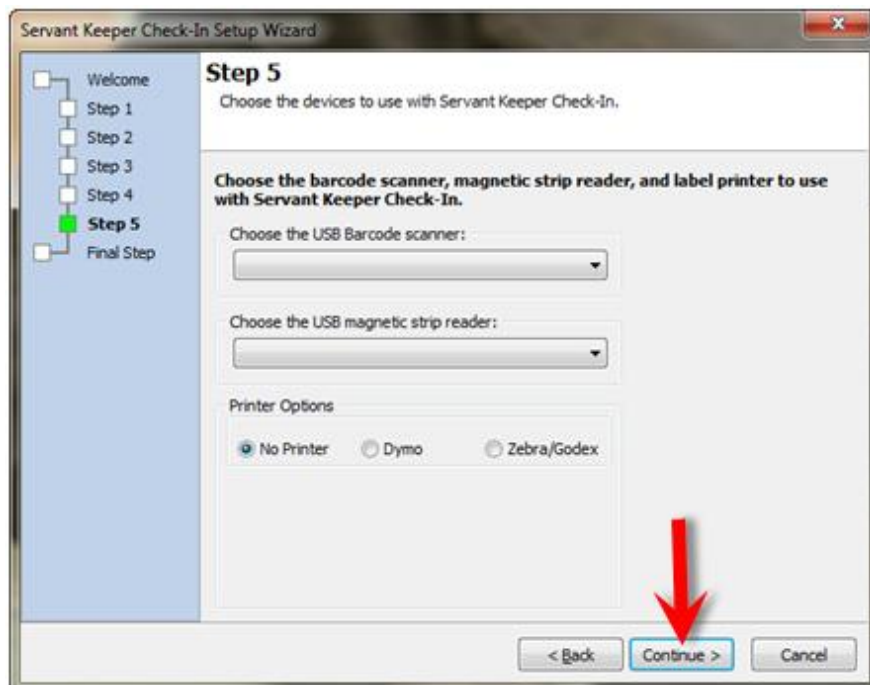
Note: If you have not yet installed your devices for the previous step, you will be able to add them at a later point by logging into Servant Keeper Check-In and selecting "System Options" under the Application Menu.

27. On the Final Step, you have the option to review your settings before completing the Setup Wizard. If everything looks correct, choose the **[Finish]** button to apply your settings.
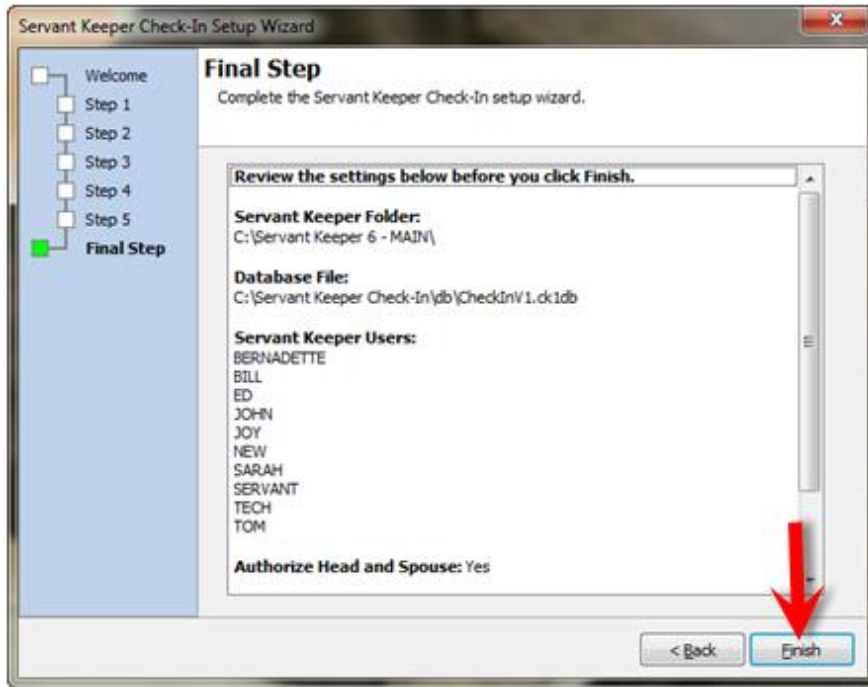
28. If you chose to authorize all Head of Households and Spouses in Step 4, you will now see Check-In authorizing those individuals. Depending on the size of your database, this step may take a few minutes.

29. When the Setup Wizard is complete, you will receive a message asking if you would like to run Servant Keeper Check-In. Click **"Yes, run Servant Keeper Check-In"** if you are ready to open the program.
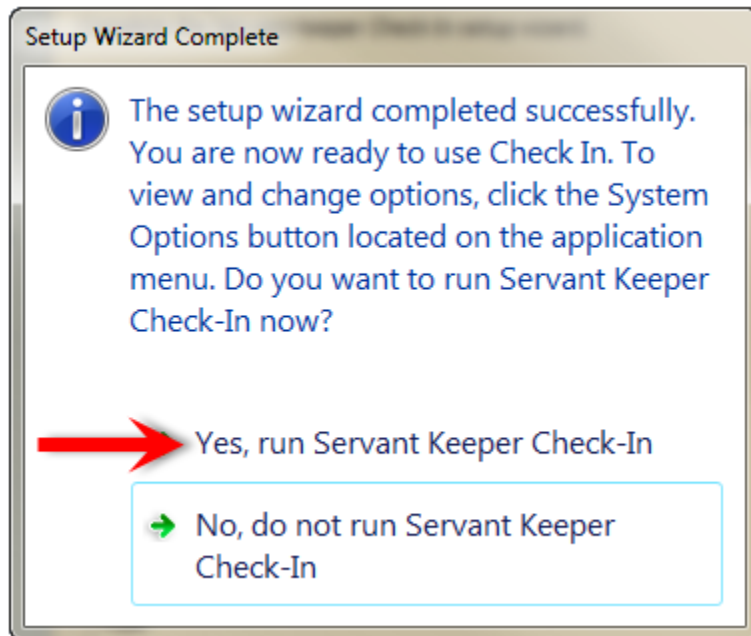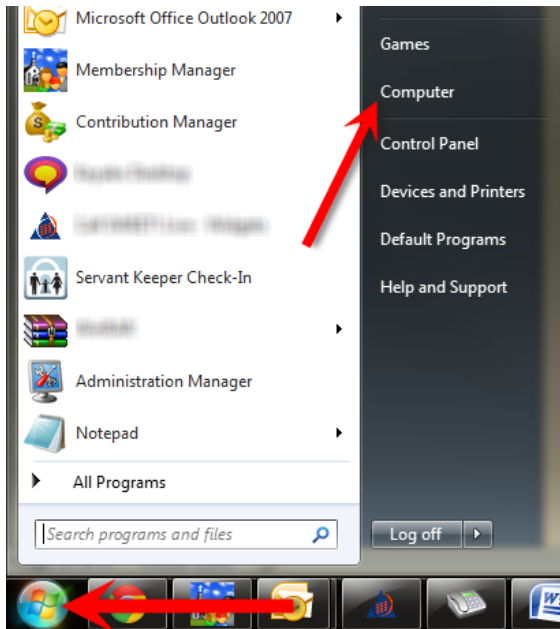

30. You will now see the Servant Keeper Check-In login window. You log in with any of the Servant Keeper User ID's and Passwords that you imported in "Step 3" of the Setup Wizard.

Step 2 – Sharing SK Check-In on the network for Windows SBS2008, Windows SBS2011, Windows Vista, Windows 7, and Windows 8:

1. On the server computer, click your Start Menu and select "Computer". **Note:** If you are on a Windows 8 computer or you cannot find "Computer", simply use the keyboard shortcut of pressing the "Windows Key" [⊞] and the "E" key at the same time.

2. Double click on the **C:** drive and locate the **C:\Servant Keeper Check-In** folder. **Right** click the Servant Keeper Check-In folder, and then click on Properties.
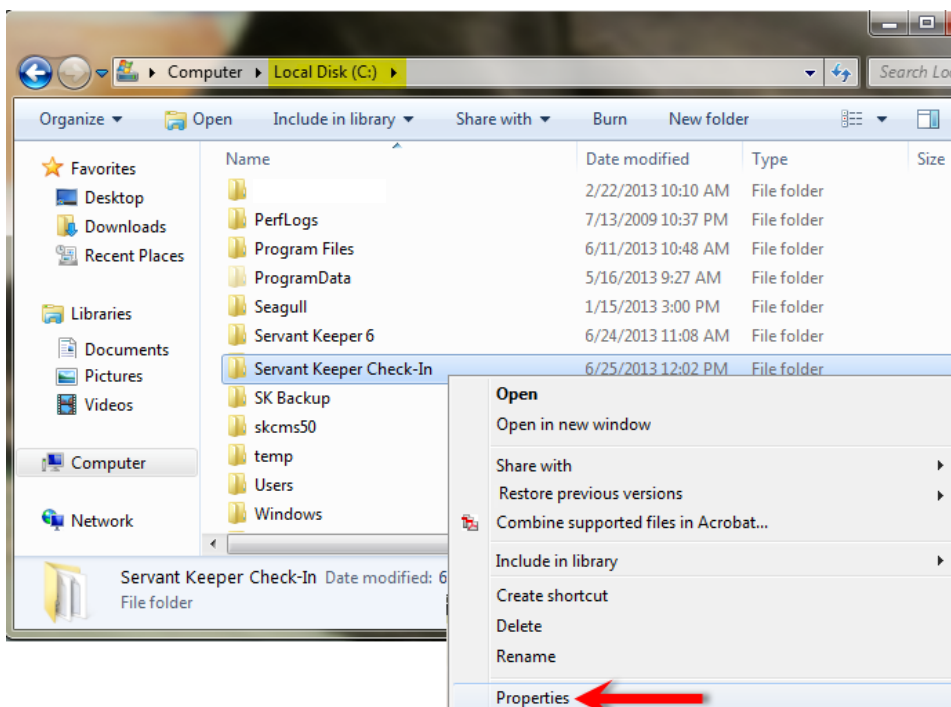
3. You will now see the "Servant Keeper Check-In Properties" window. Select the "Sharing" tab and click the **[Advanced Sharing]** button.
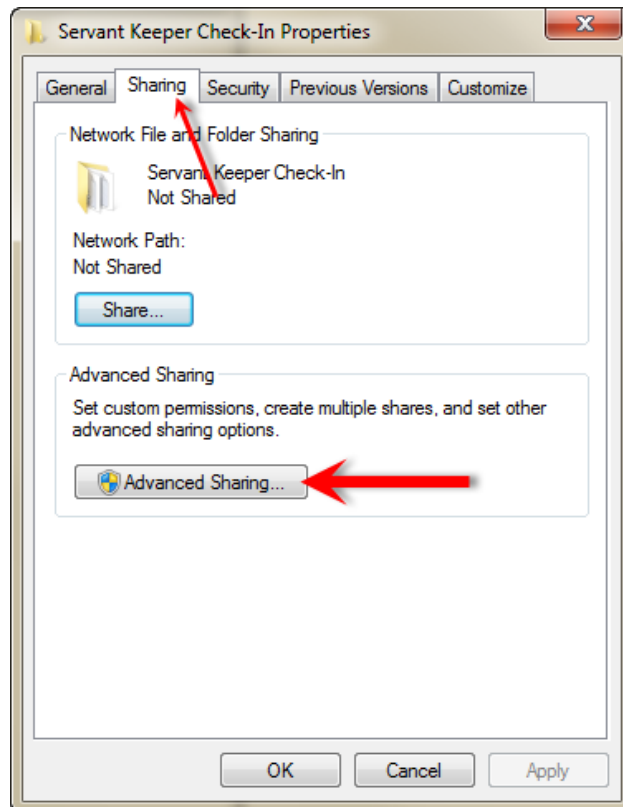
4. On the "Advanced Sharing" window, check the box to "Share this folder". Leave the share name as **"Servant Keeper Check-In"**.

5. Click the **[Permissions]** button.
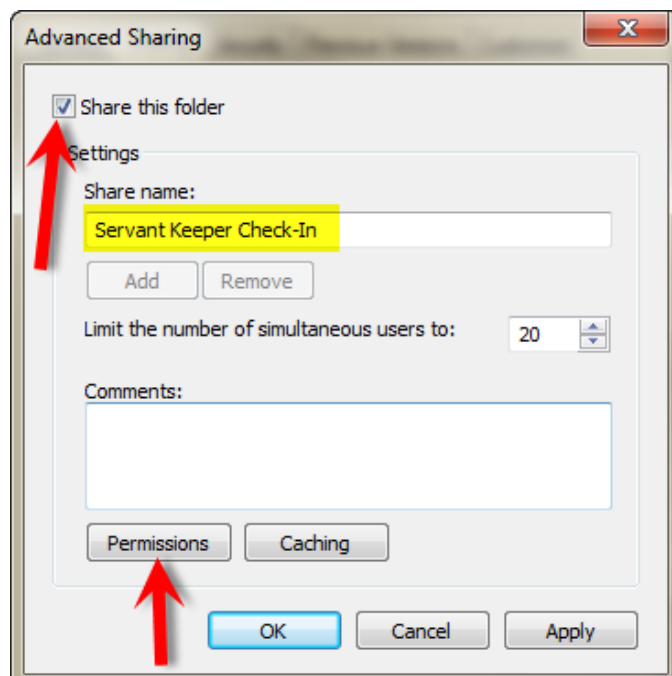
6. In the "Group or user names" box, make sure that the "Everyone" group is listed.

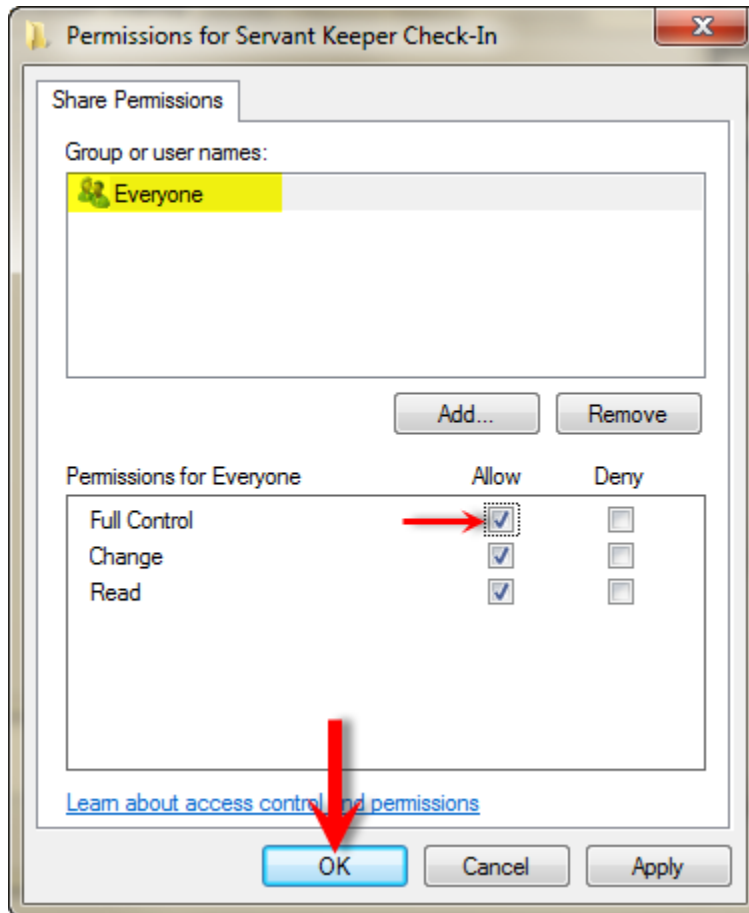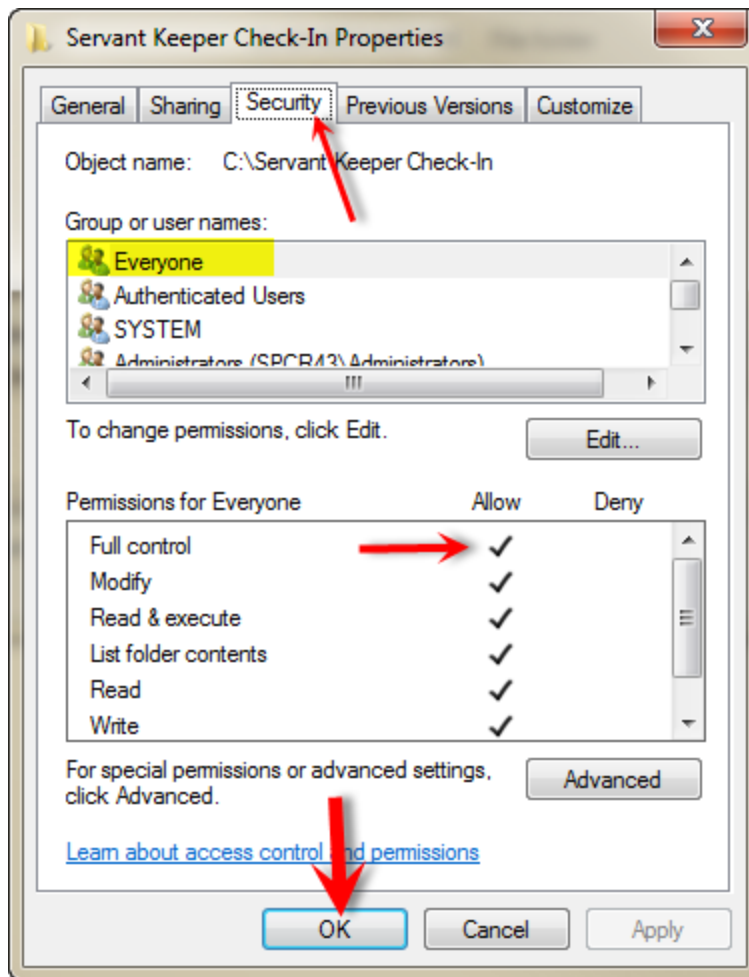   a. If "Everyone" is not listed, you will need to contact your Network Administrator for further assistance with sharing the Servant Keeper Check-In folder.

7. Under "Permissions for Everyone", make sure the group has Full Control.

8. Click **[OK]** on the "Permissions" window and then **[OK]** again on the "Advanced Sharing" window.

9. Back on the "Servant Keeper Check-In Properties" window, select the "Security" tab.

10. In the "Group or user names" box, make sure that the "Everyone" group is listed.

    a. If "Everyone" is not listed, you will need to contact your Network Administrator for further assistance with sharing the Servant Keeper Check-In folder.

11. Under "Permissions for Everyone", make sure that all permissions are checked. They do not have to have Full Control, but they do need all of the other options: **Modify, Read & Execute, List Folder Contents,** and **Read and Write.**

12. Click **[OK]**.

13. Click **[Close]** to exit and save the share settings.

14. Once the Servant Keeper Check-In folder is shared, continue to **Step 3.**

Step 3 – Workstation Installation:

1. The first thing you will need to do is create a Mapped Drive for SK Check-In on your workstation. You can map your drive directly to the "Servant Keeper Check-In" folder on your Server computer.

    a. If you are unsure how to create a mapped drive on your computer, you will need to contact your Network Administrator for further assistance with mapping the drive.

2. Open the Check-In installation email that you received and click on the first link.
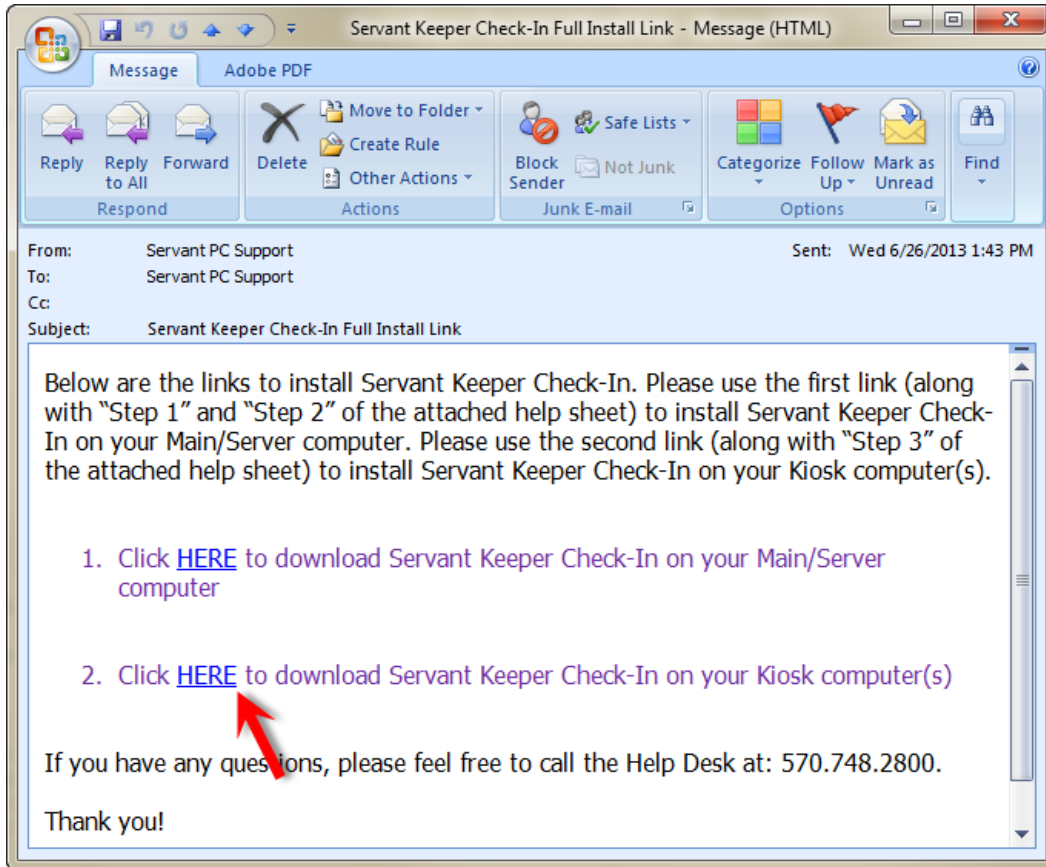

3. If your "Downloads" window opens, click the **[Run]** button to run the application.

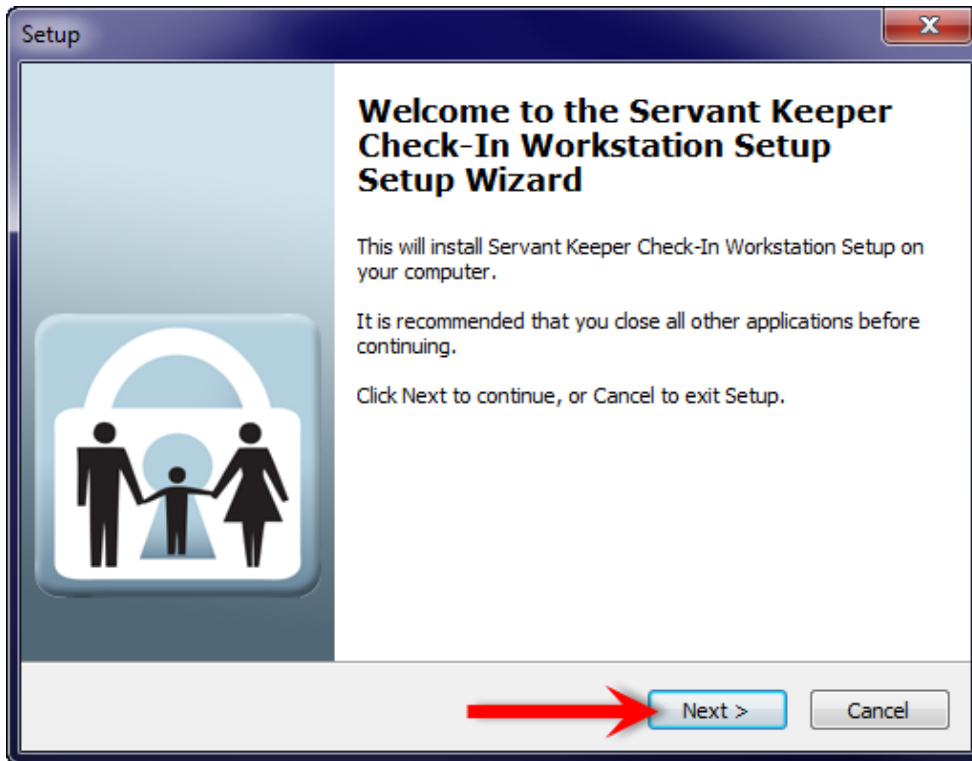   **Note:** The way that you run the application depends on your computer's settings. If you are unsure how to run the download on your computer, please consult your administrator.
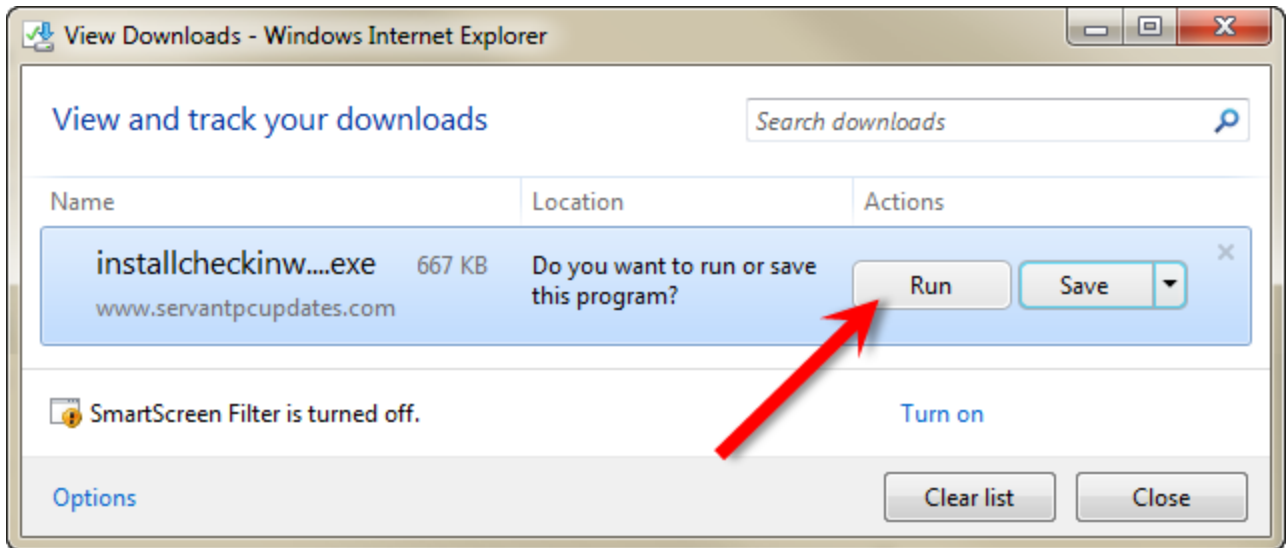
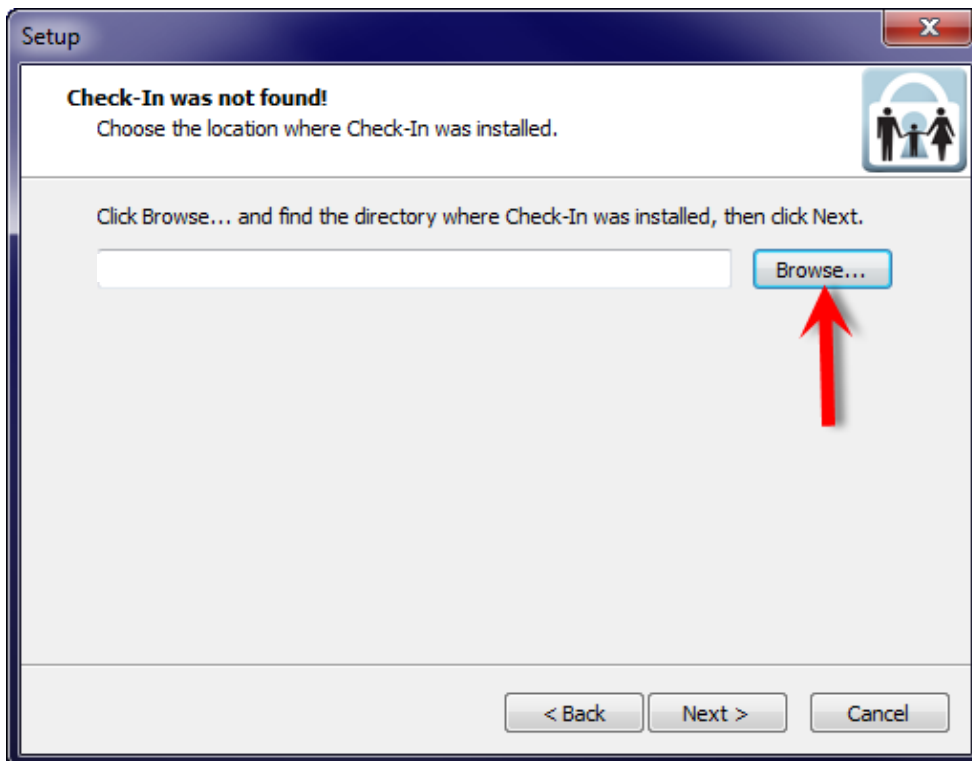4. When the Check-In installer finishes downloading, you may be prompted to "Run" the application again. Click **[Run]** to proceed.
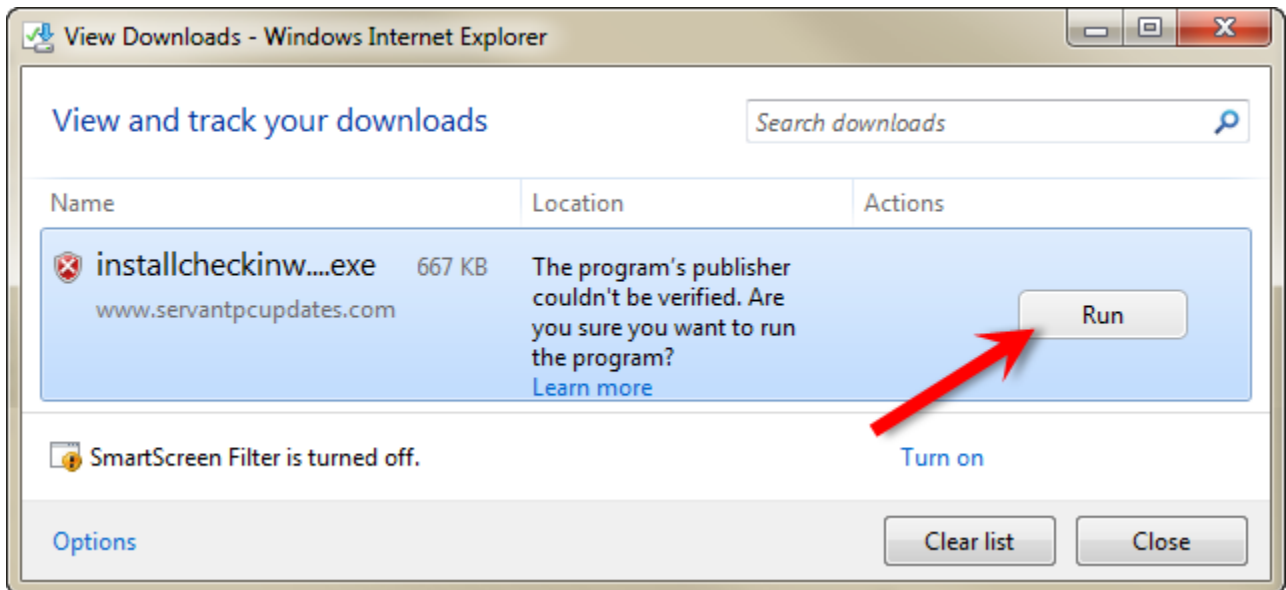

5. You will now see the "Setup" window open to the "Welcome" screen. Click **[Next].**

6. You may see a message telling you that "Servant Keeper Check-In was not found". Click **[OK]** to continue.

7. Click on the **[Browse]** button to locate your SK Check-In program.

8. In the "Browse for folder" window, click once on the SK Check-In mapped drive that you created earlier in this help sheet (see page 21), and then click **[OK]**.
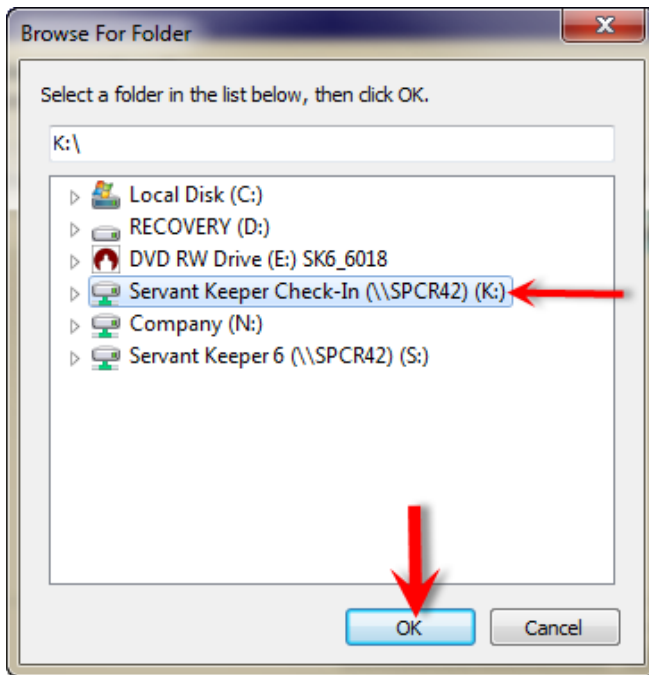
9. You should now see the path you selected in the Setup window. Click **[Next]**.

10. Next, you will be asked where you would like to place the program's shortcuts. By default, the program will create a "Servant Keeper Check-In" folder of shortcuts on your Start Menu. Click **[Next]**.
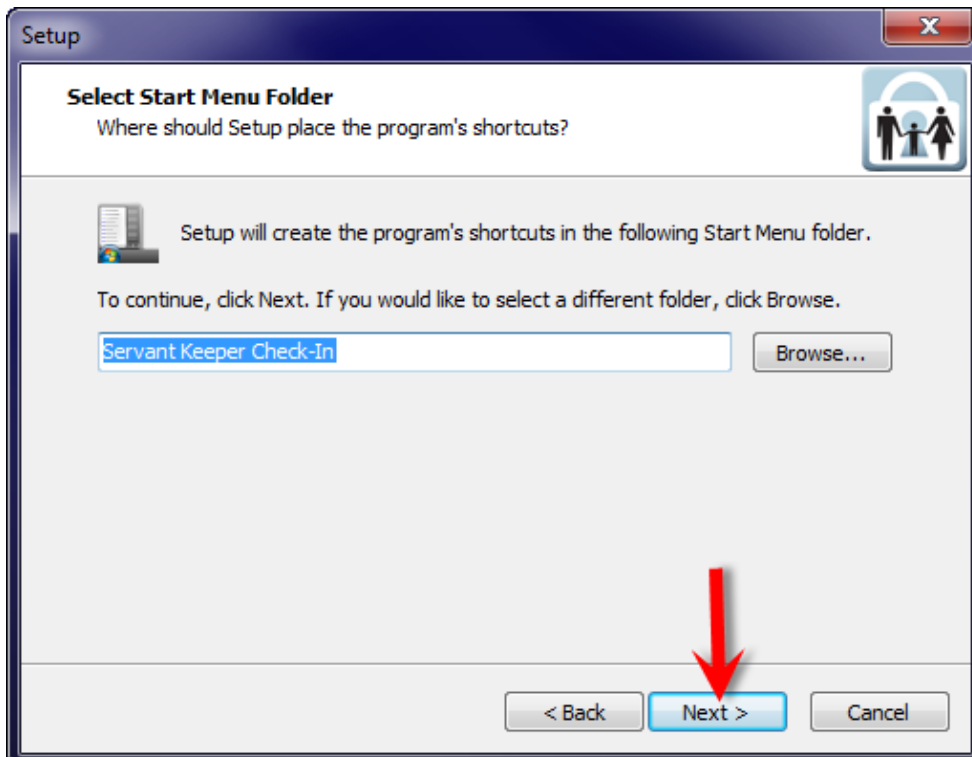
11. Your Servant Keeper Check-In is now ready to install. Click the **[Install]** button to begin.
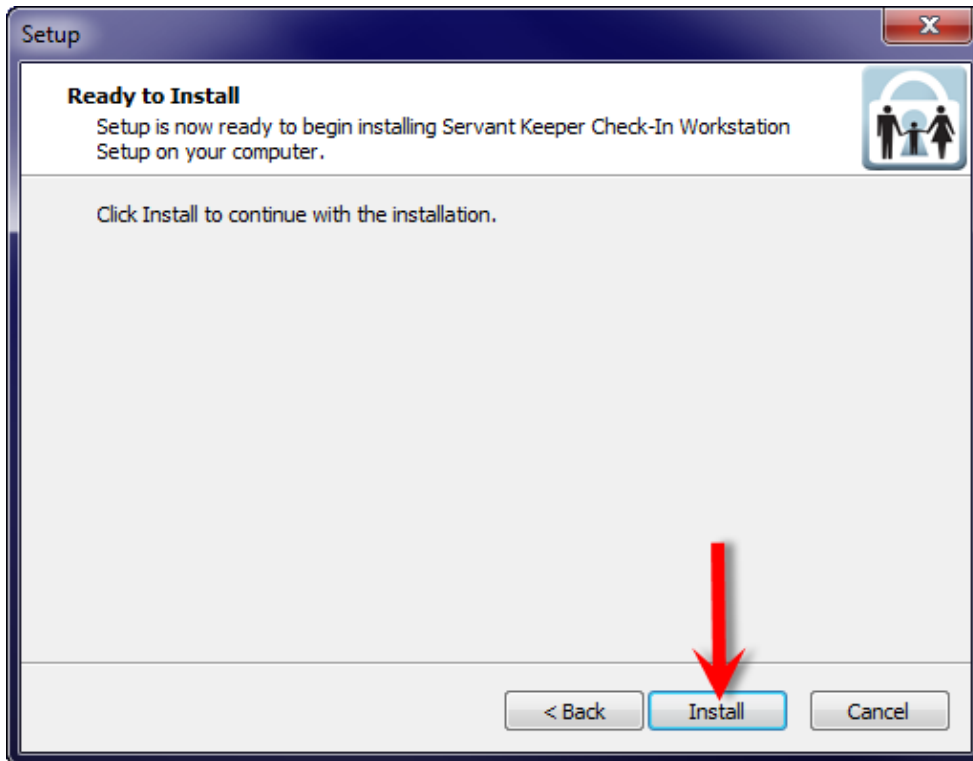
12. The Servant Keeper Check-In program is done installing on your computer. Leave the "Launch Check-In" check box checked to automatically begin the SK Check-In Setup Wizard next. Click **[Finish]** to close out of the Installation Setup Wizard.
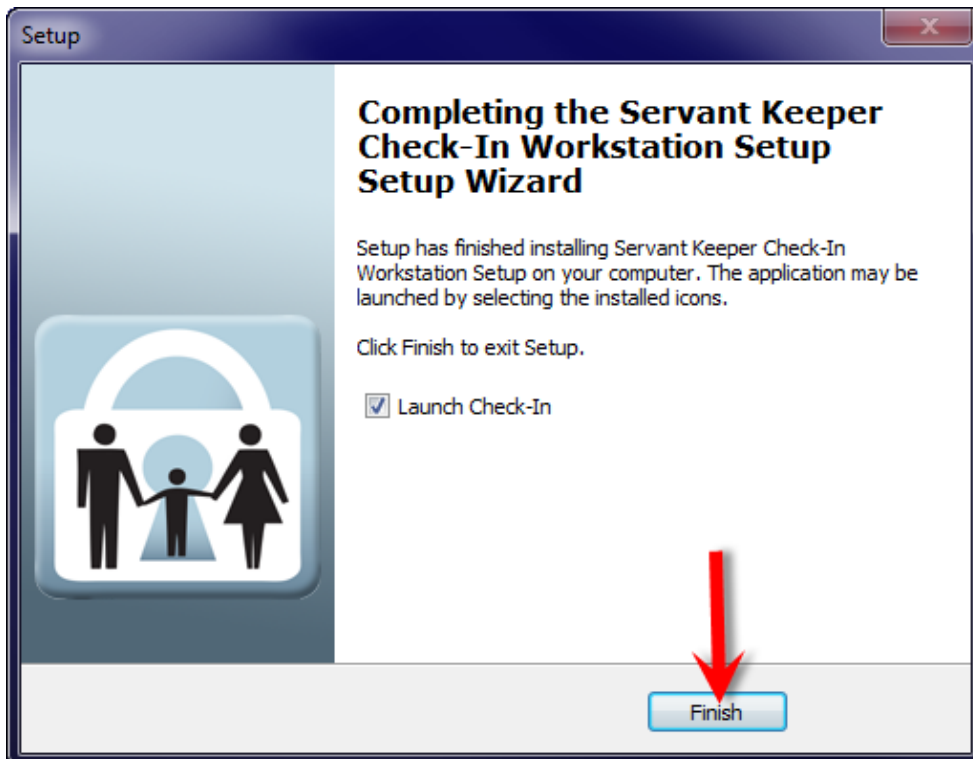
13. You will see the Welcome to the Servant Keeper Check-In setup wizard window. This wizard will guide you through the initial setup process for Servant Keeper Check-In. Click the **[Continue]** button to proceed to the next step of the setup wizard.

   **Note:** Before you continue, make sure to plug in (and, if necessary, install the drivers for) any approved devices such as the magnetic strip reader, barcode scanner, or thermal label printer. If you do not wish to add your peripheral devices at this time, you will have the opportunity to add them to the program at any time after it is installed by going into the Check-In System Options.
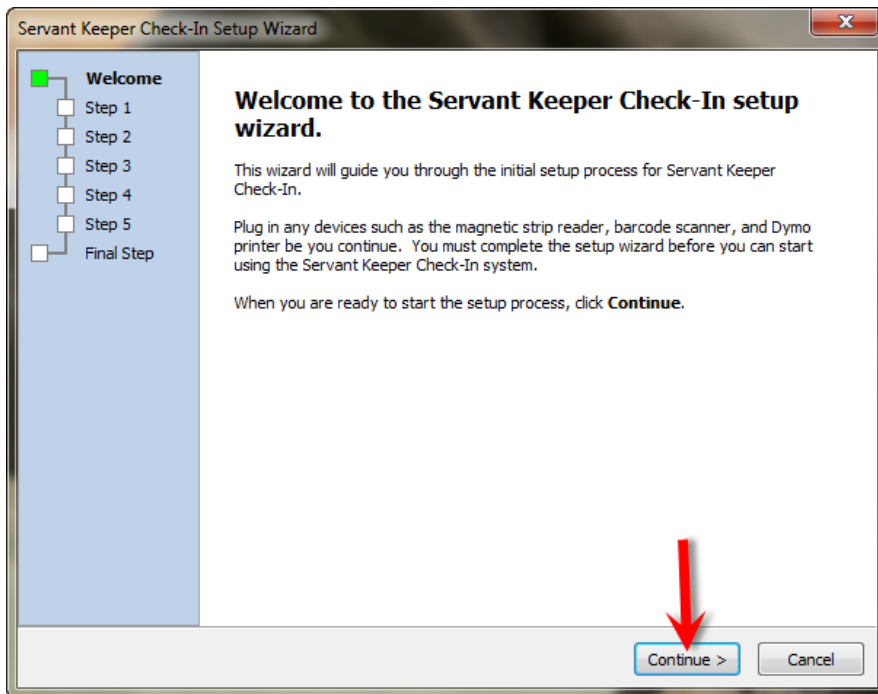
14. You will now see Step 1 of the wizard. In this step you will need to click **[Browse]** to find and select your Servant Keeper 6 database on your Server computer. When a valid "Servant Keeper 6" folder has been selected, you will see a message saying "The folder contains a valid installation of Servant Keeper". Click the **[Continue]** button on proceed to the next step of the wizard.

    a. If you are unable to locate a valid "Servant Keeper 6" folder, you will need to contact your Network Administrator for further assistance.
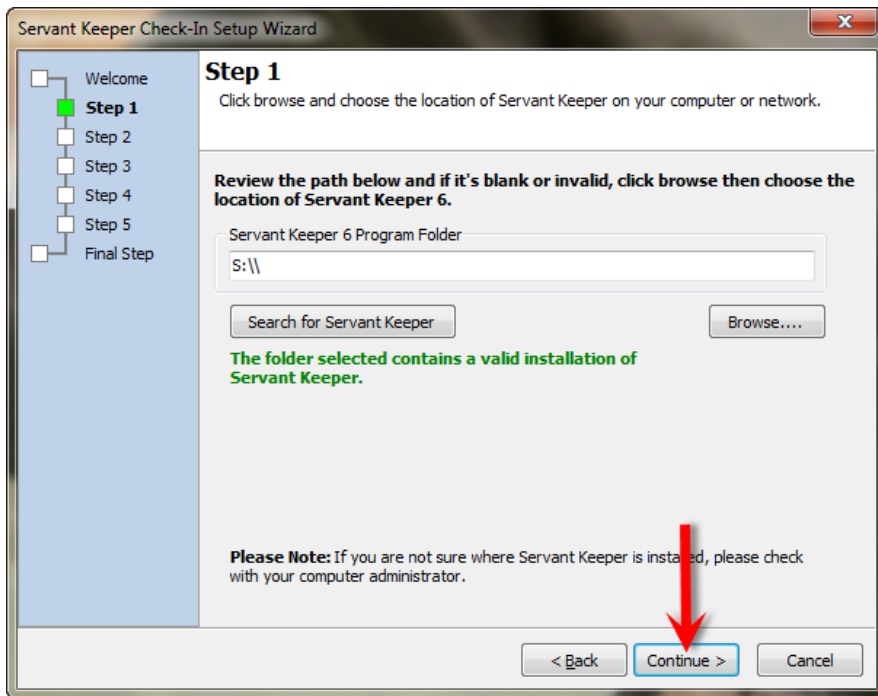
15. In Step 2, you will connect your Servant Keeper Check-In program to the Servant Keeper Check-In database. Click the **[Browse]** button and find the location of your Servant Keeper Check-In database file on the Server. If you browse through your mapped drive (created at the beginning of "Step 3"), the correct location should appear as "X:\Servant Keeper Check-In\db\CheckInV1.ck1db", where "X" is the drive letter you selected for your mapped drive. Click **[Continue]** to proceed.

Note: You can test the settings you selected by clicking **[Test Database Connection]**. If your connection is correct, you should get a message stating that "a connection to the database was made successfully.
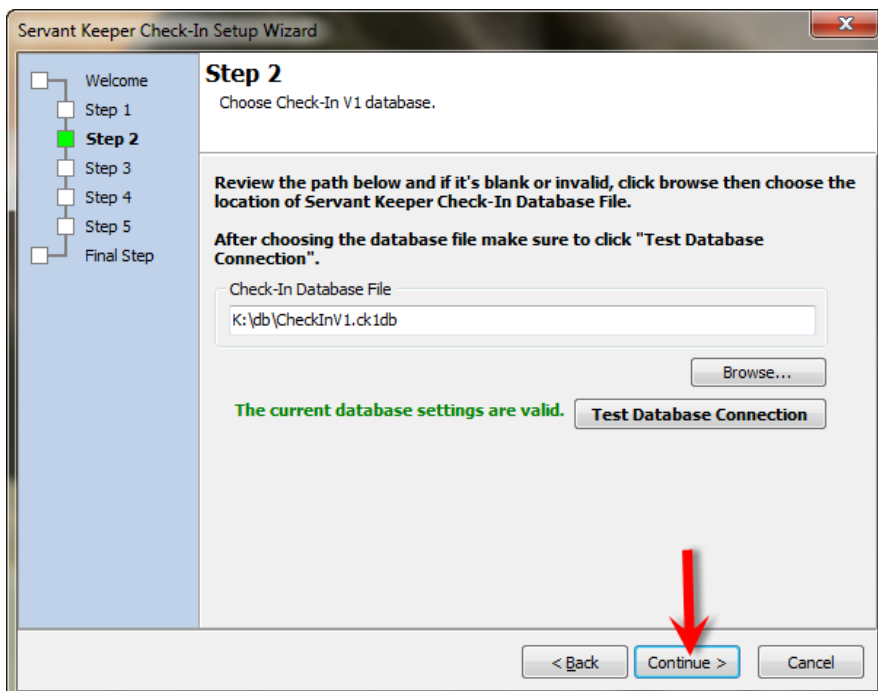
16. In Step 3, you will choose from the list of Servant Keeper users which users you would like to transfer to your Check-In program. This will allow the selected users to use their SK User ID and Password to log into the SK Check-In program. Untag any users that you do not want to import and click **[Continue]**.
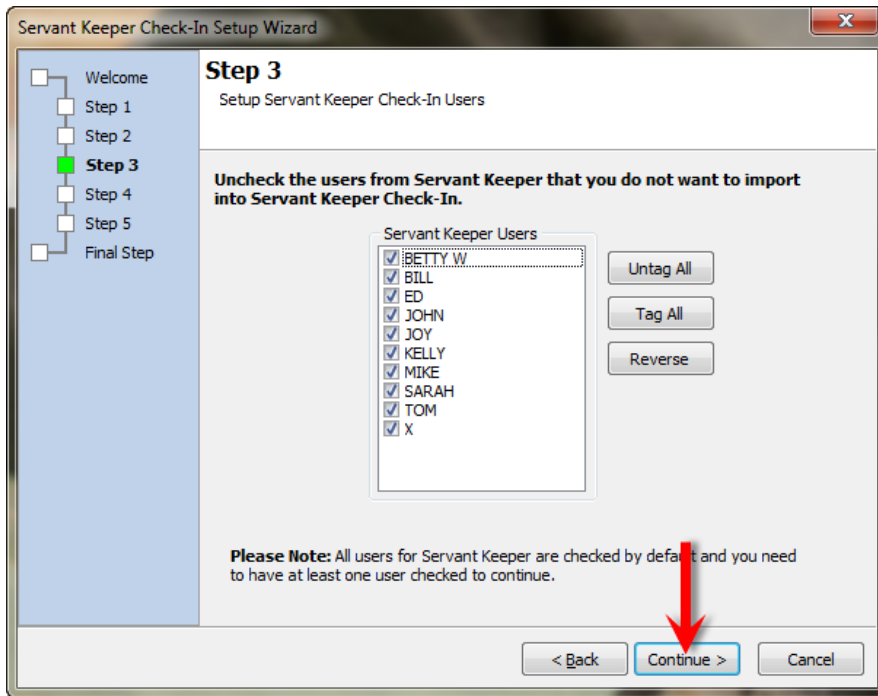
17. In Step 4, you have the option to authorize all head of households and spouses in each family. If you check this box, it will allow the head and spouse in each family to check in & out the members of their family. If you uncheck this box, you will have the option to manually authorize one family at a time.
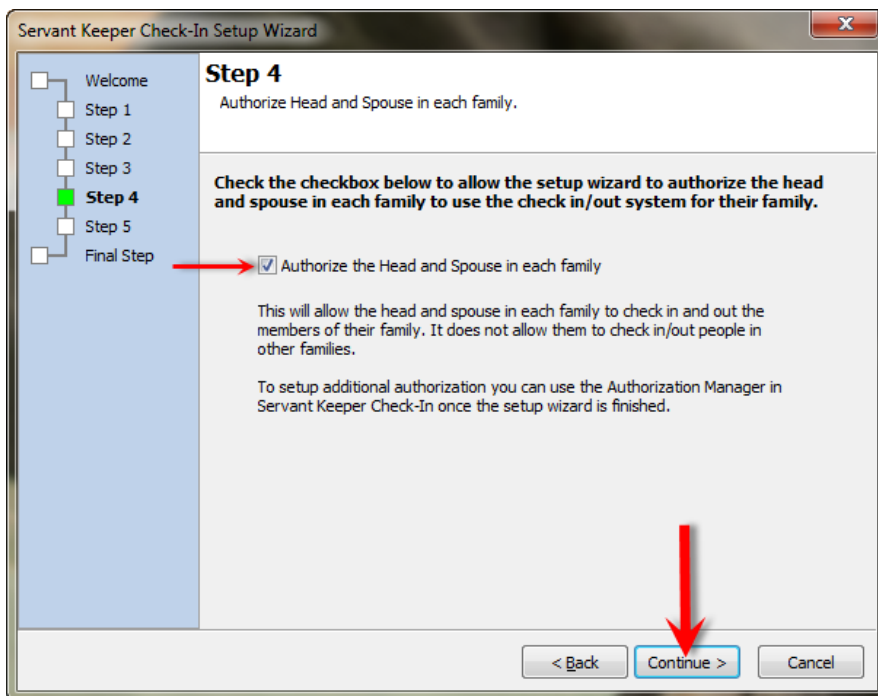
18. Step 5 gives you the options to choose the devices that you would like to use with Servant Keeper Check-In. If you already have a USB Barcode Scanner, USB Magnetic Strip Reader, and/or a Printer installed, you can select it/them at this time. After you have selected the appropriate options, click **[Continue]** to proceed.
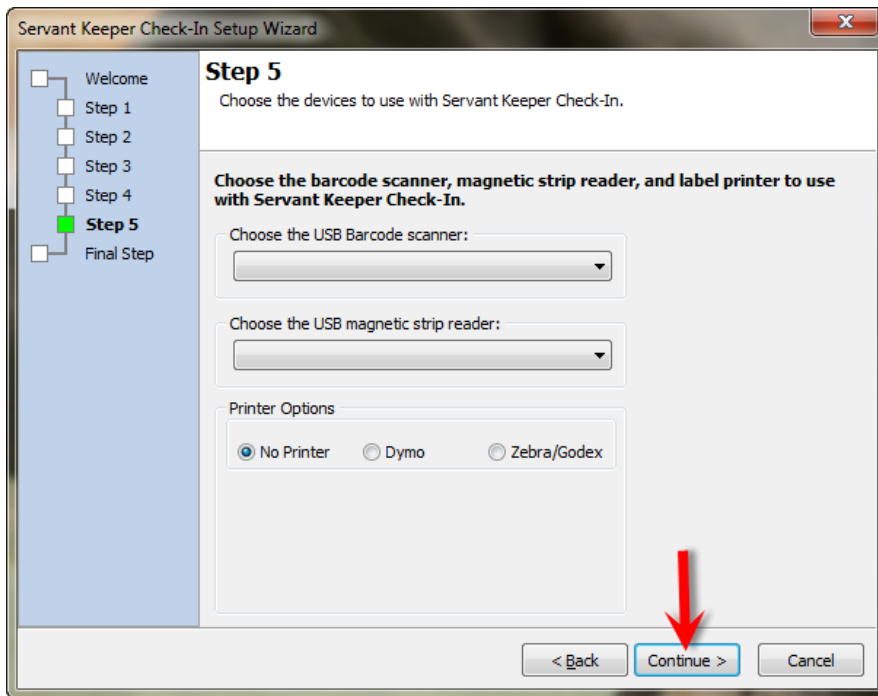
Note: If you have not yet installed your devices for the previous step, you will be able to add them at a later point by logging into Servant Keeper Check-In and selecting "System Options" under the Application Menu.

19. On the Final Step, you have the option to review your settings before completing the Setup Wizard. If everything looks correct, choose the **[Finish]** button to apply your settings.
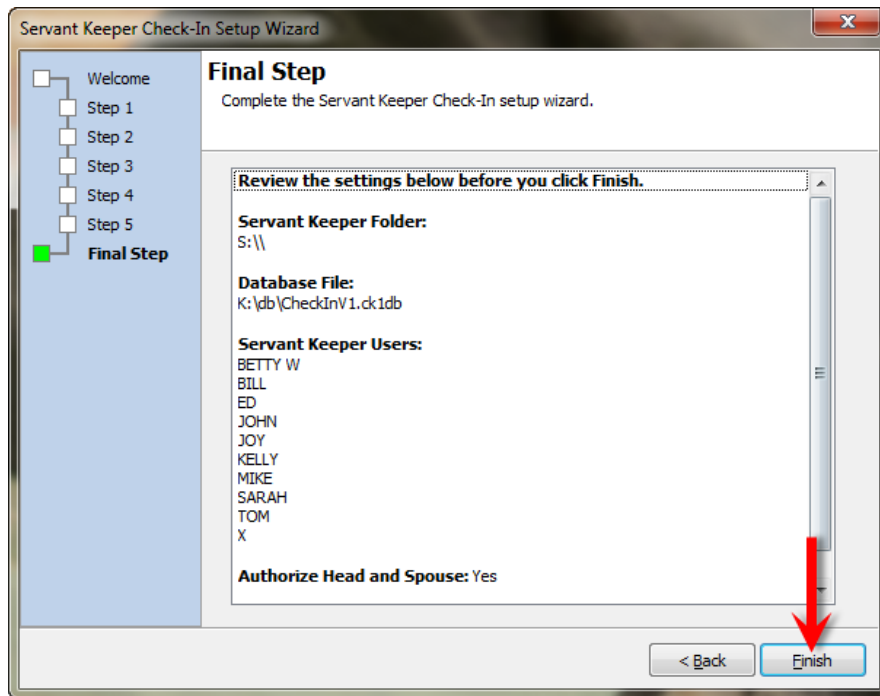
20. If you chose to authorize all Head of Households and Spouses in Step 4, you will now see Check-In authorizing those individuals. Depending on the size of your database, this step may take a few minutes.

21. When the Setup Wizard is complete, you will receive a message asking if you would like to run Servant Keeper Check-In. Click **"Yes, run Servant Keeper Check-In"** if you are ready to open the program.

Setup Wizard Complete

ℹ The setup wizard completed successfully. You are now ready to use Check In. To view and change options, click the System Options button located on the application menu. Do you want to run Servant Keeper Check-In now?

→ Yes, run Servant Keeper Check-In

→ No, do not run Servant Keeper Check-In

22. You will now see the Servant Keeper Check-In login window. You log in with any of the Servant Keeper User ID's and Passwords that you imported in "Step 3" of the Setup Wizard.

SERVANT KEEPER
Check-In

User ID [   ]   Login   Cancel
Password [   ]
                        Show Keyboard

© Servant PC Resources Inc.