Welcome to Helper 9 Installation Instructions

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How to Install the Helper Software

First you will need to install the proper version of Helper. Below are the links you need.

For a networked installation use this link for both the server computer and the workstations that are connecting to the server.

**Helper Networked**

If you are using Helper on just a single computer use the link below.

**Helper Standalone**

Click on the link and follow the installation instructions.

![Welcome to the Helper Setup Wizard](image)

*Welcome to the Helper Setup Wizard*

This will install Helper on your computer.

It is recommended that you close all other applications before continuing.

Click Next to continue, or Cancel to exit Setup.
Click ‘I accept the agreement’. Then click ‘Next’.
If this you are installing Helper on a new Computer, click YES. If you are upgrading an existing version click No.
Click **Next**
You will not see this option if you are installing a standalone system.
Click on ‘Yes’ and then click on ‘Next’.
(Note: If this is not the server PC click on ‘No’)

Select Destination Location
Where should Helper be installed?

Setup will install Helper into the following folder.
To continue, click Next. If you would like to select a different folder, click Browse.

C:\Program Files (x86)\Netsmart\Helper

At least 120.8 MB of free disk space is required.

Click Next

Select Start Menu Folder
Where should Setup place the program's shortcuts?

Setup will create the program's shortcuts in the following Start Menu folder.
To continue, click Next. If you would like to select a different folder, click Browse.

Helper Software

Click Next
Click Next

Select Additional Tasks
Which additional tasks should be performed?

Select the additional tasks you would like Setup to perform while installing Helper, then click Next.

Additional icons:
- [ ] Create a desktop icon
- [ ] Create a Quick Launch icon

Select the checkbox beside Create a desktop icon. If you’d like you can also select Create a Quick Launch icon. Then click ‘Next’
Click on ‘Install’. The program will now be installed. Depending on your computer’s security settings, you may see the screen below. If you do not see the screen below, skip to page 9.

Click on ‘Finish’. Once the computer restarts, you will need to run the Helper Transfer utility. The next steps will explain that process.
How to Run the Helper Transfer Utility.

Go to the Windows start button, this is typically the ICON on the bottom left of the screen. After clicking on it, go to either All Apps or All Programs. Find Helper Software and click on Helper Transfer.

We highly recommend that all other applications be closed prior to running the transfer.

Click ‘OK’ on the first screen.

WARNING - READ BEFORE PROCEEDING

This procedure will update your current database to the new format needed to run Helper. If the procedure does not succeed, your database will be inoperable. In this situation, you will need to restore your database from a backup.

You MUST backup your database before proceeding. We recommend you backup to your hard drive and name the backup ‘Before Transfer’.

If for some reason this transfer is not successful then you will use the backup to restore your database.

BACKUP YOUR DATA !!!

Click ‘OK’ on this Warning Screen.

If you haven’t already made a backup of your Helper data, close this Transfer utility and make a backup. Once the backup is completed restart the Transfer utility. Click ‘OK’ on this Warning Screen.
Click on Begin Transfer. When it is complete, click on ‘Exit’. You will now be on the Windows Desktop.
Setting up the Helper Server Software.

(Note: This section is only for a new installation and the Server PC or on a Standalone installation. Workstation computer will not have to do this step.)

Click on the desktop icon to start the Helper Server Admin program.

Click on OK.

Click on **Register Online**.
Enter your 6-digit Helper Customer Id/Account number and 5-digit Zip Code and then click 'Register'.

You have successfully registered the Helper Server for 2 workstations.

To complete the installation, you need to register Helper on one workstation.

You should now see the above screen and click OK. If you do not get the above screen after clicking on Register, please email Helper Support at support@helper.com with a Subject Line of 9.1 Registration.

(Note: You will not need to Register Helper on a Workstation)

You will now be at the Helper Server Administrator screen.
If you are going to be using the Appointment Reminder feature,

Click on ‘Appointment Reminders’ on the left. Then click on the checkbox beside Enable E-Mail Appointment Reminders.

If you are going to be using Calendar Synchronizing feature,

Click on ‘External Calendar Support’ on the left. Then click on the checkbox next to Enable External Calendar Support.

Click on ‘Close’.

You are now ready to start the Helper setup section.
Setting up the Helper Program to Synchronize an External Calendar

On the main Helper screen, click on ‘Setup’. Select ‘Libraries’ from the drop down menu.

Once the list of Libraries is displayed, click on ‘Therapists’. On the Therapists screen, select the name Therapist for which you wish to use Calendar Syncing. Then click on ‘Edit’ on the bottom of the Window.
On the Therapist screen, click on the ‘Schedule’ tab. Click on the checkbox to the left of **Enable external calendar support**. Finally, click on the link “Copy URL to Clipboard” button. You can now save this screen and proceed to set up your specific calendar to synchronize.
How to Synchronize with Outlook Calendar

Open your Outlook program and click the Calendar option at the bottom of the page.

Go to ‘Add Calendar’ and select From Internet from the submenu.

On the following screen, right-click and paste the URL (this was copied from Helper) into the text box displayed below. Finally click on ‘OK’.

You should now have access to your Helper Calendar.
How to Synchronize with Google Calendar

Open your Google Calendar. On the left of the page go to ‘Other calendars’. Click on the drop down arrow to the right and select ‘Add by URL’ from the list.

On the following screen, paste the URL from Helper into the text box labeled URL: Then click on ‘Add Calendar’.

Add by URL

URL: https://calsync.netsmartcloud.com/A7CAD08D-9128-4A

If you know the address to a calendar (in iCal format), you can type in the address here.

☐ Make the calendar publicly accessible?

Add Calendar Cancel
How to Synchronize with Yahoo Calendar

Open your Yahoo Calendar. On the left side of the page, click on ‘Others’ and select ‘Follow Other Calendars’.

From the Following screen, paste in the URL from Helper next to the text box labeled ‘iCal Address’. Then click on ‘Continue’
How to Synchronize with iPhone Calendar

First you need to copy the URL from the Therapist Library.

Edit the Therapist name and go the ‘Schedule’ tab. Then click on ‘Copy URL to Clipboard’.

Now click ‘Save’.

Next, create an email and paste the URL into it. Send it to an email address that you can get to on the iPhone.

From the iPhone, open the email you sent. Use the iPhone copy feature to copy the URL. Go to Settings, and select Mail, Contacts, Calendars. From the list, select Add Account and select Other. Now go to Add Subscribed Calendar. Paste the URL in for the server location. You may see a warning regarding “Cannot Connect Using SSL”. Click Continue. Enter a description for the calendar. Click Next in the upper right then save the entry.

Now, if you open the iPhone Calendar it will display your appointments. This may take a while for the initial synchronizing.
Enabling the Email Reminders Option.

Setting up the Preferences Library.

On the main Helper Screen,

1. Click on 'Setup' the select 'Preferences'.

2. Click on 'Facesheet' on the left. On the bottom right, enter the number of days you’d like the reminder sent prior to the appointment reminder go out. Click ‘Save’.
Setting up the patient Facesheet

From the main Helper screen select a Patient and click on ‘Edit Facesheet’.
Click the tab at the top ‘Appointment Reminders’. At the bottom of the page, check the checkbox next to Enable E-mail Reminders. Enter the number of days prior to the appointment to send the reminder. (It will auto-fill with the setting entered in Preferences.) Enter the email address to send the reminder and click ‘Save’.

You have set up a reminder to be sent to this patient.
How to remove all the preselected favorites from the Diagnosis Library

On the following screen, click in ‘Libraries’. On the right, click on ‘Remove All Favorites’. This will remove the all the favorites set up in the diagnosis library for all users. Then save the Preferences.