



Helper[®]

Network Upgrade Installation Instructions



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Upgrade Installation Instructions:

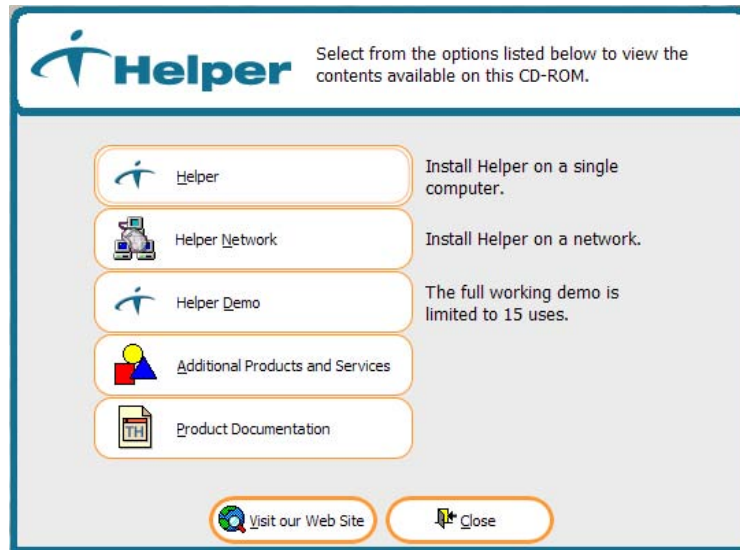
Follow the instructions below to complete a Network Upgrade Installation of Helper Software.

Note: If you are installing Helper Software on a small network (less than 5 workstations) you may install the Helper Software Database Server on a computer that will also serve as a workstation. If you are installing Helper Software on a large network (5 workstations or greater) we recommend installing the Helper Software Database Server on a dedicated server.

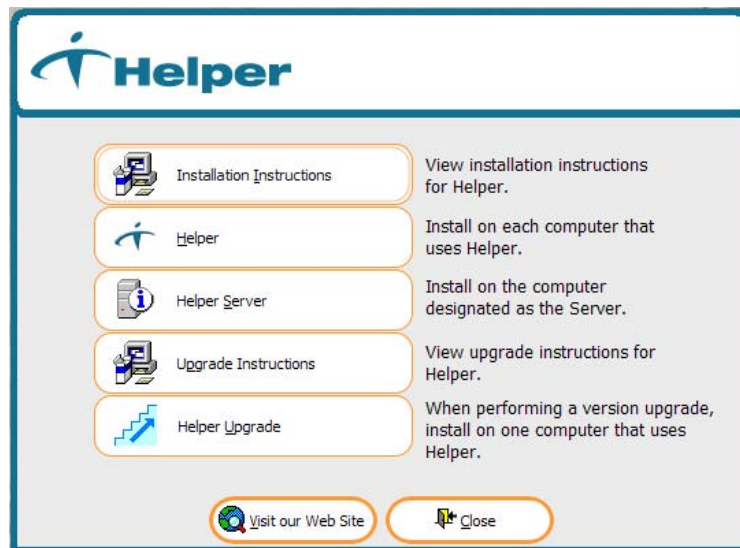
1. Install the Helper Client Software on the computer that will serve as the server for your Helper Software data and where the Helper Software Database Server will be installed.
 - a. Place the Helper Software Installation CD in the CD ROM Drive of the computer where you will install the Helper Software Database Server. The installation should start automatically. If the installation wizard does not start automatically:
 - i. From the Windows Desktop, select My Computer.
 - ii. Double click the CD ROM drive.
 - iii. Double click cdSetup.exe.
 - b. Click **Helper Network**.
 - c. Click **Helper Software** and the Installation Wizard will guide you through the installation process.

2. Install Helper Software Database Server Software on the computer that will be the server for your Helper Software data. **NOTE: You must be logged into the computer as Administrator before installing the Helper Server software.**
 - a. Place the Helper Software Client Server CD in the CD ROM Drive of the computer where you will install the Helper Software Database Server. The installation should start automatically. If the installation wizard does not start automatically:
 - i. From the Windows Desktop, open My Computer.
 - ii. Double click the CD ROM drive.
 - iii. Double click cdSetup.exe.

If you downloaded the software from the web, double-click on the file you downloaded to launch the installation wizard and skip to step c below.



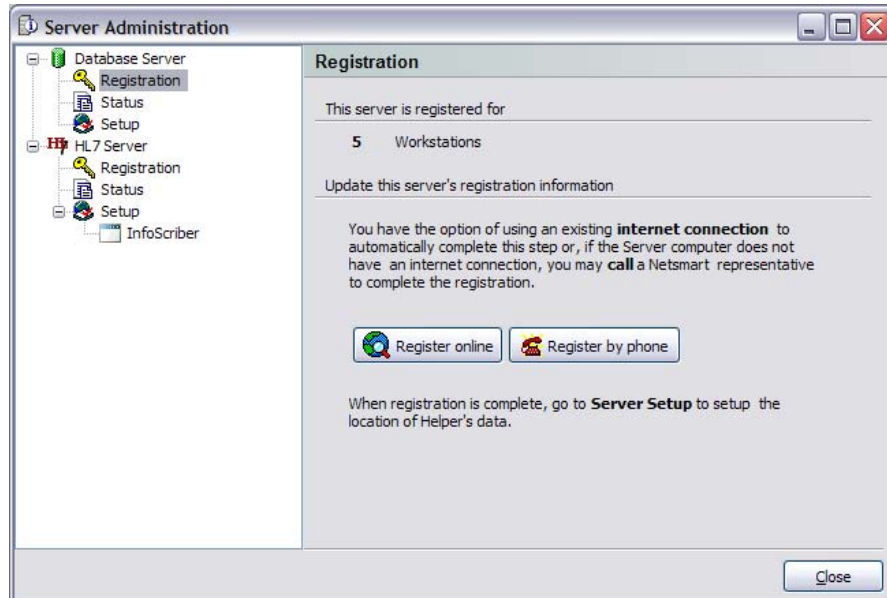
- b. Click **Helper Network**. The second wizard screen displays:



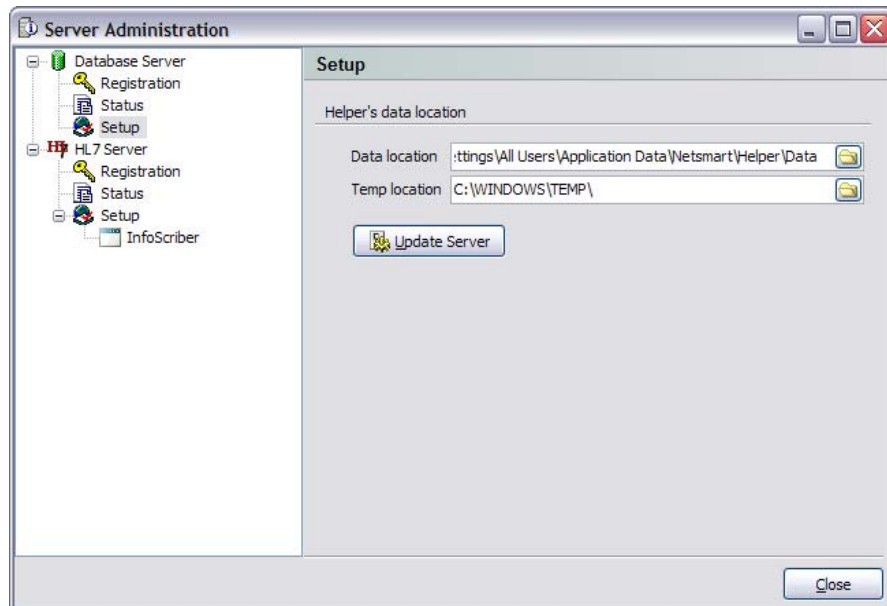
- c. Click **Helper Server** and the Installation Wizard will guide you through the installation process.



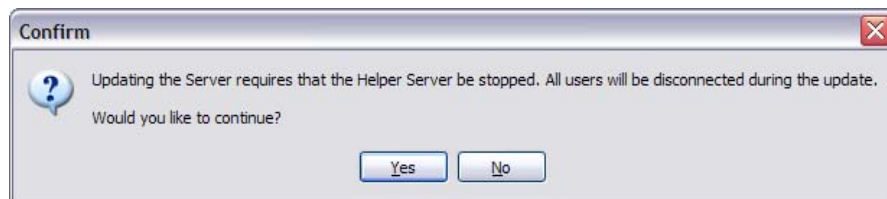
- d. Open Server Administration Utility by selecting **Start | Programs | Helper Software | Server Administration**.



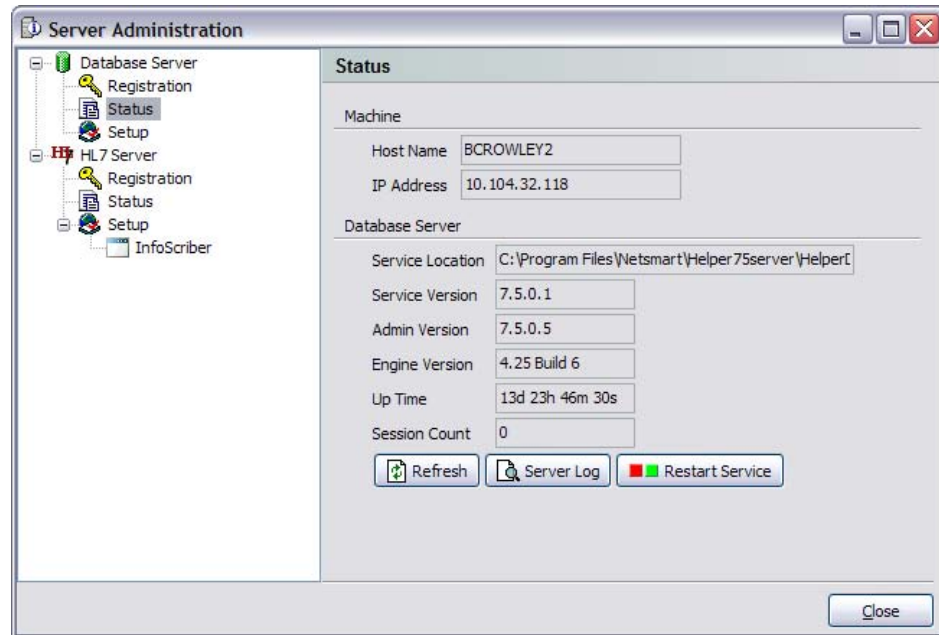
- e. Click **Database Server > Setup** on the left hand panel of the Server Administration Utility.
- f. Specify the location of your Helper Software data. By default this should be C:\Documents and Settings\All Users\Application Data\Netsmart\Helper\Data.



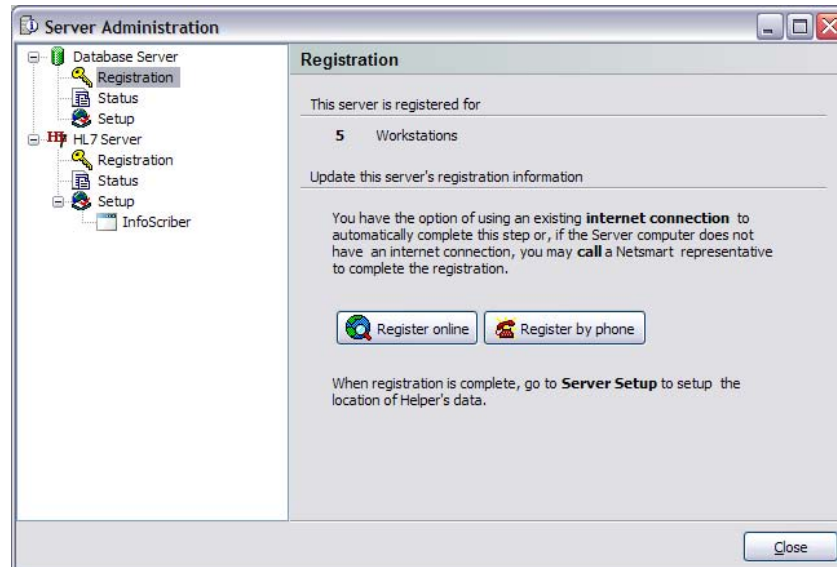
- g. Click **Update Server** and click **Yes** when asked if you want to continue.



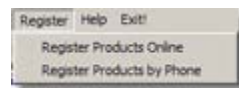
- h. Click **Server Status** on the left hand panel of the Server Administration Utility.



- i. Write down the information in the **Host Name** field.
 - j. Click **Close**.
3. Configure the Helper Software Client Data Setup Utility on the computer that will be the server for your Helper Software data.
 - a. Open the Data Setup Utility by selecting **Start | Programs | Helper Software | Data Setup Utility**.
 - b. Under Access Mode, click **Standalone**.
 - c. In **Data Location**, enter the information as specified in step 2f
 - d. Click **Save**.
 4. Register your Software.
 - a. Open Server Administration Utility by selecting **Start | Programs | Helper Software | Server Administration**.
 - b. Click **Registration** on the left hand panel of the Server Administration Utility.



- c. Select either **Register online** or **Register by phone**.
 - i. If you select register online, you must have an active Internet connection and follow the on screen instructions. (You will need your Helper Software account number and zip code. Both will be listed on your invoice.)
 - ii. If you select register by phone, call (800) 343-5737 and register the client (step 4d - 4eii) while you are on the phone.
- d. Open the Helper Client software on the computer that will be the server for your Helper Software data by selecting **Start | Programs | Helper Software | Helper Software**.
- e. From the Register menu, select either **Register Products Online** or **Register Products by Phone**.



- i. If you chose to register online, you must have an active Internet connection and follow the on screen instructions. (You will need your Helper Software account number and zip code. Both will be listed on your invoice.)
 - ii. If you choose to register by phone, call (800) 343-5737.
- 5. Install the Helper Software Client software on all of the other computers on which you will use Helper Software.
 - a. For all workstations, follow the instructions for Step 1.
 - b. You will not need to register any clients if you have completed Step 4.
- 6. Configure the Helper Software Client Data Setup Utility on all of the other computers on which you will use Helper Software.
 - a. Open the Data Setup Utility by selecting **Start | Programs | Helper Software | Data Setup Utility**.
 - b. Under Access Mode, click **Client-Server**.
 - c. In **Host Name**, enter the information you wrote down in Step 2j.

- d. Delete the information in **IP Address** field.
- e. Click **Save**.

Note: We strongly recommend backing up your networked Helper Software from the server or workstation where your Helper Software Database Server is installed. To review how to backup your Helper Software data, please consult Helper Software's help system by clicking "Help Contents" in the Helper Software "Help" menu.