



# Event Helpmate™ 2004 - Upgrade Startup Guide

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**PLEASE READ THIS DOCUMENT IN ITS ENTIRETY BEFORE INSTALLING & RUNNING  
EVENT HELPMATE™ 2004**

**Welcome** to the Event Helpmate™ 2004 upgrade. Event Helpmate™ 2004 is a full version upgrade for the Helpmate Scheduler™ 2002 product. We are confident that this new version will enable you and your organization to “do more, in less time, and with less effort...than ever before”. This version upgrade, which is a result of months of development and testing, was birthed out of feedback and suggestions from customers like yourself. We sincerely hope you enjoy and have fun with your new software!!

This “Upgrade Startup Guide” was designed to help get you up and running on Event Helpmate™ 2004 as quickly and painlessly as possible. It includes installation assistance, instructions on converting your previous version’s data, and information on the exciting new features and enhancements now available to you.

The upgrade process basically consists of 3 parts:

- (1) Installing the Event Helpmate™ 2004 program
- (2) Entry of User Name & Registration Code
- (3) Running the Event Helpmate™ 2004 “Upgrade Utility” to import in your Helpmate Scheduler 2002 data.

## **(1) INSTALLATION**

In order to use the new Event Helpmate™ 2004 product, it must first be installed onto your computer - and on any other computer from which you (or others) will want to run the program. Typically, you will want to install Event Helpmate™ 2004 on any computer currently running Helpmate Scheduler™ 2002. When installing Event Helpmate™ 2004 on a computer that has Helpmate Scheduler™ 2002 installed, the Event Helpmate™ 2004 installation will not affect your previous version in any way. Eventually, after you have completed the entire upgrade process described by this document, you will want to uninstall your previous version from each computer.

**Minimum System Requirements** - In order to install Event Helpmate™ 2004 onto your computer, it must meet or exceed the following minimum system requirements:

- Windows 98 or newer Windows operating system
- Pentium 133MHz processor
- 64MB RAM
- 200MB free disk space
- Super VGA display adapter running 800x600 resolution

**Recommended System Requirements** - To ensure the most efficient operation and best user experience, it is recommended (but not necessary) that your computer meet or exceed the following “recommended” system requirements:

- Windows XP
- Pentium III 500MHz processor
- 256MB RAM

**Installation** - Installing Event Helpmate™ 2004 is a quick and simple process:

1. Close any programs you currently have running and disable your antivirus software.
2. Insert the Event Helpmate™ 2004 CD into your computer's CD drive.
3. After several seconds, the installation program should begin automatically.  
NOTE: If the installation program does not start automatically, follow the steps below:
  - Click the Windows "Start" button, then select "Run"
  - On the "Open" line, type: x:\EH2004Setup.EXE (where "x" represents the letter of your CD drive)
  - Click the OK button
4. Follow the on-screen instructions to proceed with the installation process.
5. At the final completion screen, you will have the option to "View the ReadMe file". You are encouraged to read the "ReadMe" file as it contains additional information regarding the product and late-breaking details that may not have been included in this startup guide or in the product's User's Manual.

**NOTE:** During the installation of Event Helpmate™ 2004, your current version of Microsoft Internet Explorer will be checked. If your current version is older than version 5.50.4134, IE will be automatically upgraded to version 6.0 during the installation of Event Helpmate™ 2004. You may also be asked to reboot your machine one or more times during the installation.

After installing Event Helpmate™ 2004, you will notice a new EH2004 icon on your Windows Desktop. This icon will be your typical method for starting the Event Helpmate™ 2004 program. An "Event Helpmate 2004" program group will also have been created for you under the Windows "START" button as shown below:

**"START" button | All Programs (or Programs) | Event Helpmate 2004**

Within this EH2004 program group, you will find several additional items related to EH2004 such as utilities and documentation.

## **(2) USER NAME & REGISTRATION CODE ENTRY**

Initially after installing EH2004, it will operate in "Demo" mode. Upon program startup while in Demo mode, you will be presented with an initial startup screen that will include a button labeled "**Enter User Name & Registration Code**". You will want to click this button and then enter the User Name & Registration Code provided to you on your EH2004 CD's jewel case. After successful entry of your User Name & Registration Code, the Demo mode of operation will be terminated. You will need to perform this entry of your User Name & Registration Code on each machine running EH2004.

**IMPORTANT NOTE:** Your Helpmate Scheduler™ 2002 User Name and Registration Code will not work with Event Helpmate™ 2004.

**IMPORTANT NOTE:** After installation, the Event Helpmate™ 2004 program will initially use a sample data set. In order for Event Helpmate™ 2004 to be loaded with the data contained in your previous version, you must run the Event Helpmate™ 2004 Upgrade Utility as explained in the following section.

### (3) UPGRADE UTILITY

Event Helpmate™ 2004 includes an “*Upgrade Utility*” which you will want to use in order to bring your previous version’s data into EH2004. Until you run the Upgrade Utility, your Event Helpmate™ 2004 software will display only a sample data set. The EH2004 Upgrade Utility will perform the following actions:

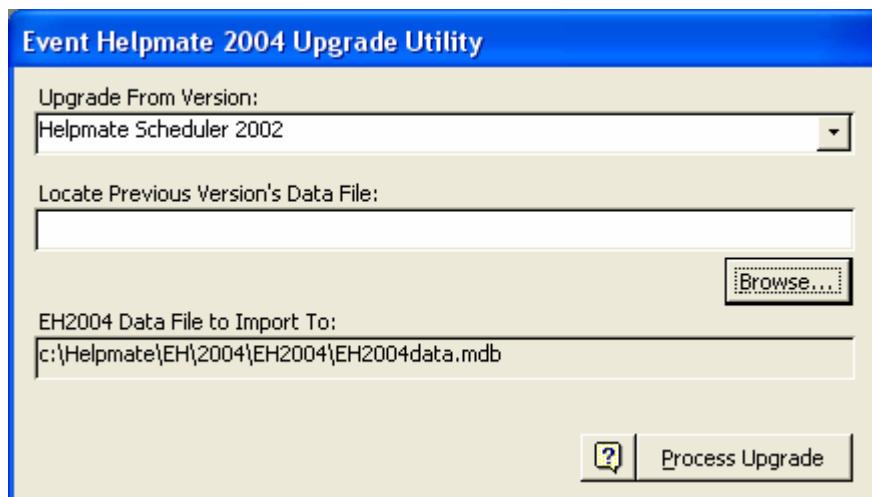
1. Create a new (empty) EH2004 data file
2. Import all of the records that currently exist in your previous version’s data file into this new EH2004 data file

The EH2004 Upgrade Utility will not alter the data in your previous version’s data file in any way (it only “reads” the data).

**IMPORTANT NOTE:** It is extremely important that only 1 Event Helpmate 2004 data file be produced by this Upgrade Utility. If you need to supply other non-networked computers with your EH2004 data, please use the EH2004 backup/restore functions to do this - and do **NOT** re-run this Upgrade Utility on other computers. Doing so may produce duplicate records in your database if the EH2004 Data File Synchronization feature is used in the future.

To start the Upgrade Utility, choose “Upgrade Utility” under the Event Helpmate 2004 program group as shown below:

“START” button | All Programs (or Programs) | Event Helpmate 2004 | Utilities | Upgrade Utility



Upon opening the Upgrade Utility, you will need to supply 2 pieces of information:

1. The name of the previous version you are upgrading from (for example, “Helpmate Scheduler 2002”)
2. The location of the previous version’s data file (use the “Browse” button to assist with this)

Once you have provided these items, use the “Process Upgrade” button to begin the process. The length of time required to complete this process will vary depending on several factors such as number of records in your previous version’s data file, speed of your computer, etc. Processing time can range anywhere from several minutes to several hours. **During the upgrade process, it is strongly recommended that no other work be performed on the computer. The upgrade process is a very disk intensive function and, although the Upgrade Utility may appear to be unresponsive if you switch tasks on the computer after you have begun the upgrade process, it would be very rare for the process to actually be locked-up. If errors are encountered, they will be displayed on the screen.**

**IMPORTANT NOTE:** If your previous version's data file is currently located somewhere on your organization's network (that is, not on your computer's hard-drive), it is recommended that you make a copy of the data file and place the copy on your computer's hard-drive. Then run the Upgrade Utility using this **local** copy of the data file. **Doing so will greatly reduce the processing time** since working with a previous version's data file through the network is much slower than working directly with a file on your computer's hard-drive.

**IMPORTANT NOTE:** In the unlikely event that you receive any error messages during the process, this indicates that some of your previous version's data was **not** able to be brought into Event Helpmate™ 2004. If this should occur, please:

1. Contact Helpmate Technology Solutions support department (859-384-7323 M-F 9:30a-5p EST or support@helpmate.net) for further assistance. We will work with you to ensure that all of your previous version's data is brought into EH2004. **For those customers not on a support plan, no fees will be charged for this upgrade assistance.**
2. **Continue using your previous version until the Upgrade Utility issue is resolved.**

Upon successful completion, a message will be displayed indicating that the upgrade process has finished. Start the Event Helpmate™ 2004 program to verify that it is now showing your organization's data (imported from the previous version's data file).

## **OBTAINING TECHNICAL SUPPORT**

- **Support Plan Subscribers:** If you are subscribed to either our Gold, Silver, or Bronze support plans, please follow the standard support channel procedures for your plan (as provided to you at the time of your support subscription).
- **Non-support Plan Clients:** If you received the 2004 version upgrade, but are not currently subscribed to a support plan, you are eligible to receive technical support assistance via Email during a 30-day period beginning from the date you received the upgrade. Email inquiries should be sent to **support@helpmate.net**. Phone support is also available, but requires a \$30/incident fee. As noted above, technical support assistance (if needed) to convert your previous version's data into the 2004 version is available at no charge (by phone or email) even after the initial 30-day period expires.

## **ADDITIONAL NOTES ABOUT THE EVENT HELPMATE 2004 UPGRADE**

Event Helpmate™ 2004 introduces several significant changes to the design and foundational aspects of the previous Helpmate Scheduler™ 2002 product. We're confident that these changes will help to improve your organization's efficiency and effectiveness in event management.

- In HS2002, the system was confined to 8 pre-defined Resource "types" - rooms, furniture, electronics, library items, keys, vehicles, staff/volunteers, and general. In EH2004, the Resource "type" listing is completely user-configurable. As part of this change, Rooms are no longer a specific type of Resource record. There is now a separate module just for Rooms. When setting up Event records, there is now a new room assignment field to select the desired room for the event. You will no longer set the room assignment as a resource reservation for the event.
- In doing away with the pre-defined Resource "types", Resource data fields that were specific to the 8 HS2002 Resource types were removed. For example, EH2004 Resource records no longer have a "Year" field for vehicles (because this field was specific to the HS2002 "Vehicle" resource type). A memo/note field is provided for each Resource record in EH2004 where this additional information can be stored (there is no limit to the amount of text you can store in the memo/note field).
- The People module of EH2004 has been enhanced to allow you to keep your Staff/Volunteer records as People records – and not Resource records. This change allows all of your people to be held in a common, single location (i.e. the People module). For each Person record in your database, you can configure the person with regard to their involvement with your organization using the new "Include-In" list checkboxes found on the Person Detail form. For example, there is an "Event Registration" include-in list that controls whether or not a person is included in the list of people who are available to register for Events.
- In HS2002, resource reservations could be made by either an Event or by a Person (from the People module). EH2004 has been redesigned and streamlined in such a manner that now resource reservations can only be made by Events.

- The "Resource Scheduler" which existed in HS2002 no longer exists in EH2004. Feedback from HS2002 users what that this control was too complicated and was seldom used, if at all. We have however, included a "Room Chart" view that provides the same basic features of the HS2002 "Resource Scheduler". The EH2004 Room Chart view displays all room usage for a selected date in a time bar chart fashion.
- In HS2002, there was a separate "Events Calendar" and "Resource Calendar". In EH2004, these calendars have been consolidated and streamlined into a single "master" calendar control which is now capable of monthly, weekly, and daily views. The reporting/exporting capabilities have been greatly improved, as well.
- In HS2002, the report header setting was a local preference setting that had to be setup and configured on each workstation running HS. In EH2004, the report header setting is now a "setup" parameter which is stored in the EH2004 data file. There is now a primary and secondary heading. These headings only have to be setup once (not on each workstation).
- The HS2002 Event "Speaker/Facilitator" field has been replaced in EH2004 by a "Main Contact" field. This Main Contact field will pull from the people in your People database who have been included in the "Event Main Contact" Include-In list. This streamlines things so that you don't have to keep a separate listing of people in a Speaker/Facilitator list.
- The HS2002 Resource "Managed By" field has been changed in EH2004 so that it pulls not from a separate listing of individuals (as in HS2002), but from the people in your People database who have been included in the "Resource Manager" Include-In list.
- The "Schedule" tabs located on the Resource Detail, People Detail, and now Room Detail forms have been relabeled to "Schedule View", and the "day view" control on these tabs is now a read-only control. All scheduling of rooms, resources, and people is now centralized in the Event Detail form.