Sidekick

18.10.0 and Below

AVIMARK®

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Requirements for using Sidekick

We highly recommend contacting Technical Support for assistance with the initial setup of your Sidekick. Call (877) 838-9273, option 1.

- You must have a network (network cards on laptop and server and the capability of connecting the laptop to the server by cables, etc.).

- The laptop or portable computer must meet the minimum hardware requirements for a server. If your clinic does not have a copy of the hardware requirements, please call Technical Support or view the **Hardware Requirements** document on the **Avimark website**.

- Both the server and the laptop must be on the same version of Avimark at all times. If you update the server, you must also update the Sidekick prior to any transfer of data between the two computers.

General Information

- There is no setup required on the Avimark server computer in order to utilize the Sidekick feature.

- You may have multiple Sidekicks with each one refreshing and importing independently.

- It is not recommended that statements are run on the Sidekick computer.

- It is not recommended to run the Sidekick computer in Client/Server mode.

- When using client/patient folder numbers with Sidekick, it is imperative to use unique starting numbers on the Sidekick. You can set these in **Work with > Hospital Setup > Demographics**.

- If you use wellness plans, you will need to set 'Enable Checking for Recurring Payments' and 'Avimark needs to check for Recurring Charges' to false in advanced options to prevent duplicate recurring charges. Recurring charges and recurring payments should not be run on the Sidekick computer.To make these settings, go to **Work with > Hospital Setup > Advanced > Advanced Options**.

> **Currently the limitation on the number of integers in the client folder number is 8 and the patient is 7.**

Setting up Sidekick

Avimark must be installed on each laptop that you will use as a Sidekick. To do this, have each laptop on the network with the Server and copy the entire Avimark folder from the Server to each laptop.

> ⚠️ **Before you copy the Avimark folder, check to see if it contains a file named Import.VM$ or Import.V2$, this is dependent on your version of Avimark, verify that the file is of zero size. If it has size, that means that the Sidekick flag has been set on the Server at sometime in the past, then delete the Import.VM$ or Import.V2$ file, again depending on your version will decide which file you will have.**

> 📄 **Either the Sidekick's Avimark folder or the entire hard drive must be shared with full access.**

On the Desktop of the Sidekick computer, create a shortcut to the Sidekick's Avimark. It is recommended that you re-name the shortcut "Sidekick". If you will be using the laptop, at times, as a workstation, it is highly recommended you name this shortcut "Avimark on server". This will minimize the chance of entering data into the wrong Avimark.

On the laptop, go to **Work with > Hospital Setup > Advanced > Advanced options** and locate the Avimark Sidekick option. Set the default value to True. Once this is set, changes made on the Sidekick will be stored in the import.vm$ file inside the Sidekick Avimark folder.

It is possible to maintain separate invoice numbers for the Sidekick computer. On the laptop, go into **Work with > Hospital Setup > Invoicing** tab. Set the next invoice number to a new number. This will prevent duplicate invoice numbers.

> 📄 **Do not use alpha characters in the next invoice number field. Adding numeric characters to the current invoice number is recommended.**

Refreshing the Sidekick

⚠ **Before taking the Sidekick into the field, or its initial use, it MUST be Refreshed. Even though no data has been entered into the Server's Avimark since it was copied, this must be done. Failing to Refresh may result in errors and loss of Sidekick data. Refreshing the Sidekick before its first use initializes invisible fields in Avimark. The Sidekick must be Refreshed each and every time before using it.**

When the Sidekick is refreshed its data is overwritten with the server's data. Below are the steps to Refresh the Sidekick computer.

1. Make sure the laptop is logged onto the network.
   - The laptop should be hardwired to the server during the refresh and import process.

2. Be on the Server and have Avimark closed on ALL other computers.

3. Back up both the Sidekick and the servers Avimark. This is in addition to the automatic backup that can be created.
   - To take a backup go to **Utilities > Backup Avimark Files**. This should be done on the Sidekick computer and the server computer.

4. Make sure Avimark is not open on the Sidekick.

5. Open Avimark on the server computer and go to **Utilities > Sidekick**.

6. In the Import from field, select the location of Avimark on the laptop; use the browse button, if needed. You must select the location of the Sidekick in order to get to the next window that allows you to refresh the Sidekick. Double-click on the Avimark folder then click Open.

7. Click **Next**.

8. It is highly recommended to keep the options **Create backup of Sidekick** and **Create backup of Main System** checked.

9. Click **REFRESH** to refresh Sidekick's data. You will be asked to confirm that you want to overwrite the Sidekick data with the server's data, click **Yes**.

10. After the Refresh process is complete, you will receive a message that the Sidekick's data has been refreshed. Click **OK**.

After Refreshing, the import.VM$ and/or import.V2$ file will have a size of 0. The Sidekick is now initialized and ready to use.

Importing from Sidekick

When you IMPORT to the server, you are merging the Sidekick's data with the Server's data.

1. Make sure the laptop is logged onto the network.
   - The laptop should be hardwired to the server during the refresh and import process.

2. Be on the Server computer and have all other computers closed out of Avimark.

3. Back up both the Sidekick and the servers Avimark. This is in addition to the automatic backup that can be created.
   - To take a backup go to **Utilities > Backup Avimark Files**. This should be done on the Sidekick computer and the server computer.

> **The import.vm$ file does not actually contain the data that was changed on the Sidekick. When you make changes on the Sidekick, the changes are made in the appropriate .vm$ files. Import.vm$ is like a map with directions that tells the program where to go to get the changed data (i.e. client.vm$, service.vm$, etc.).**

4. Make sure Avimark is closed on the Sidekick.

5. Open Avimark on the Server and click on **Utilities > Sidekick**.

6. Select the location of Avimark on the laptop, browsing if you need to. You will double-click on the Avimark folder, and then click Open.

7. To review the information that has been modified in Sidekick, click Display all records.

> **Not all the information shown may actually import.**

8. Click Next

9. It is recommended that both Create a backup of Sidekick and Create a backup of Main System remain checked.

This backup of the main system creates a file called import.zip, which is stored in the main system's Avimark folder.

The backup of Sidekick creates a file called Sidekick.zip, which is stored in the Sidekick Avimark.

10. The option of "Update inventory quantities during Import" allows inventory used or sold on the Sidekick to be imported. If the option is not checked, any inventory entered into medical history will be put back into inventory when you refresh the Sidekick.

11. Click IMPORT. After importing, the import.vm$ file becomes zero and is then ready to store data when you use Sidekick again.

12. A confirmation that you want to import information from the Sidekick into the clinic computer will show. Click Yes.

13. When the import is complete, click OK. You will receive a notice that if you want to copy your Avimark files back to Sidekick to Click Refresh.

> ⚠ **It is highly recommended that you refresh after every import. Failure to do so can create duplications**

> 📄 **It is not necessary to rebuild any indexes. During the import the system links the records internally.**

Information that Imports from Sidekick

> ⚠ **This list is not meant to be all inclusive. If you have any questions, please contact Avimark Technical Support.**

1. Accounting transactions.

> 📄 **Hospital Setup information does not get overwritten when you refresh the Sidekick.This being said, it is possible to keep unique invoice numbers for the Sidekick.**

2. Additions and changes to client and patient records.

3. Additions and changes to medical history.

4. Appointments (if you are running Avimark Version 175 or higher).

5. Changes to inventory on hand quantity.

6. Deletions.

> 📄 **It is not recommended that either clients or patients be deleted from the Sidekick computer as they will be deleted from the server upon importing.**

7. Estimates: (Only patient specific, not canned).

8. Follow-ups.

9. Information entered on a medical condition record.

10. Notes.

Exception: *If notes are entered on the Sidekick and the server, on the same entry, the Sidekick notes will not import.*

11. Patient reminders.

12. Photos.

> **After importing you will need to manually copy the photo into the correct location in the Photos folder on the Server computer.**

13. Voice notes.

> **If you enter Voice notes on the Sidekick, you will need to manually copy them to the server computer.**

Information NOT Imported from Sidekick

> **This list is not meant to be all inclusive. If you have any questions, please contact Avimark Technical Support.**

1. Changes to Hospital Setup values.

2. Appointments, if you are NOT running Avimark Version 175 or higher.

3. Boarding, Daily Block Offs, and "Out of Office" schedules.

4. Any modifications to treatment or inventory lists. This includes changes to the needs list and reminders.

5. Any Split-billing set up on the Sidekick.

6. Any information entered into More Stuff fields on the Sidekick will not import.

7. Any additions or changes to the e-travel sheet will not import to the server.

8. Any additions or changes to System Tables will not import to the server.

This includes breeds and colors entered on the Sidekick. If breeds and/or colors were entered on the Sidekick. Please contact Technical Support for help correcting this.

9. File attachments will not import.

10. Glossary notes that are added on the Sidekick.

Not all the information shown may actually import.