# Configure your Computer for athenaNet

# **Vathena**health

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## Before you configure your computer

The process of configuring your computer for athenaNet should take just a few minutes. If you have trouble making any of the necessary changes, contact your IT department for assistance.

## Windows users need administrative rights

To get started, you need to verify that you have administrative rights (Windows only). If you do not have administrative rights, work with your IT department to ensure that your computer is configured appropriately.

To verify this:

- 1. Click Start.
- 2. Click control panel.
- 3. Click User accounts.
- 4. Click Manage User Accounts. If you're an administrator, it should display on the page pictured below.



## Safari version 13 on macOS

## Configuring your Mac

- 1. We recommend disabling Swipe between pages on your Mac.
  - a. Click the **Apple** menu.
  - b. Select System Preferences.
  - c. Select Trackpad.
  - d. Uncheck the box next to Swipe between pages.



- 2. Enable Full Keyboard Access.
  - a. Click the Apple menu.
  - b. Go to System Preferences.
  - c. Select Keyboard.
  - d. Choose the Shortcuts tab.
  - e. Toggle Full Keyboard Access to All controls.

Keyboard	Text Shortcuts Input Sources Dictation	1
To change a shortcut, select	it, click the key combination, and then type the n	ew keys.
Launchpad & Dock	Change the way Tab moves focus	^F7
Mission Control	Turn keyboard access on or off	^F1
Keyboard	Move focus to the menu bar	^F2
Screenshots	Move focus to the Dock	^F3
Services	Move focus to active or next window	^F4
Spotlight	Move focus to the window toolbar	^F5
<ol> <li>Accessibility</li> </ol>	Move focus to the floating window	^F6
App Shortcuts	Move focus to next window	¥`
	Move focus to the window drawer	7 <b>3</b> %'
	Move focus to status menus	^F8
		Restore Defau
		Restore Delau
Text boxes and lists on All controls To change this setting, press ^fr	-	cus between:

## Required settings for athenaNet in Safari

Below is a summary of all athenaNet support settings with both a description of the setting and the supported value that should be set in Safari. You should set these settings manually following the instructions in the <u>Configure Safari</u> section.

Settings	Reason	Supported Value
Allow pop-ups	Allow pop-ups to display	On
Auto-fill forms	Automatically fills form fields with previously entered data	Off
Save passwords	Allows your browser to save passwords	Off
Default print margins	Sets the default page margins for printing	0.25"

## Configuring Safari

- 1. Verify that you are using Safari 13.0.
  - a. Open your Safari browser.
  - b. Click Safari.
  - c. Click About Safari.



- 2. Allow pop-up windows.
  - a. Click Safari.
  - b. Select Preferences.
  - c. Select the Websites tab at the top of the window.
  - d. Select **Pop-up windows** on the left side.
  - e. Select Allow from the When visiting other websites: drop-down menu at the bottom.

0.0	Websites	
ral Tabs AutoFill Passwords S	earch Security Privacy Websites Extensions Advanced	
nai laus Autorni Passwolus o	carchi Security Privacy Websites Extensions Advanced	
Seneral	Allow pop-up windows on the websites below:	
Reader	Currently Open Websites	
Content Blockers	athenahealth.sharepoint.com	Allow
Auto-Play		
• Page Zoom		
Camera		
Microphone		
Screen Sharing		
Location		
Oownloads		
Notifications		Block and Notify
Pop-up Windows	Remove When visiting other	Block r websites  Allow

- 3. Disable the autofill feature before using athenaNet. This feature has the potential to autofill information where not intended.
  - a. Click Safari in the program menu and select Preferences from the drop-down menu.
  - b. Select the Autofill tab at the top of the window.
  - c. Uncheck all four boxes next to the autofill options to deselect them. This turns off the autocomplete features.

About Safari Safari Extensions			AutoFil		
Preferences Settings for This W	X,	the second se	rch Security Privacy Websites Extensions Advanced		
Clear History		AutoFill web	o forms: Using information from my contacts	Edit	
Services			User names and passwords	Edit	
Hide Safari Hide Others Show All	нж 1367		Credit cards Other forms	Edit	?
Quit Safari	960				

- 4. Set your print margins.
  - a. Click File and select Print. Make sure that your default printer is selected.

	Printer:	O DYMO LabelWriter 400 Tur	bo 🔽
	Presets:	Default Settings	0
	Copies:	1	
	Pages:	O All	
		From: 1 to: 1	
	Paper Size:	Untitled	8.50 by 11.00 inche
	Orientation:	Scale: 10	00%
		Safari	0
Antonio		Print backgrounds	
And and a second		Print headers and footer	s
1of1			
PDF Hide Details			Cancel Print

b. From the Paper Size drop-down list, select Manage Custom Sizes.

na de ser a ser	99017 Suspension File Printer 99018 Small Lever Arch 90019 Large Lever Arch Banner Copies Continuous, Wide Internet Postage 3-Part Pages Return Address Shipping Address Paper Size ✓ Untitled Orientation Manage Custom Sizes Print backgrounds ♥ Print headers and footers
PDF 📴 Hide Details	Cancel

- c. Click the + sign (bottom left) to create a new paper size.
- d. For the **Non-Printable Area**, set all margins to .25. You can set a name for your custom paper size as well.

athenaNet	Paper Size:	8.5	11 in
		Width	Height
	Non-Printable	Area:	
	User Defined	ł	3
		.25 in	
	.25 in	Тор	.25 ir
	Left	.25 in	Right
		Bottom	
+ - Duplicate			
?		Cancel	ОК

e. Click OK.

Note: If you're unable to create a custom size, contact your IT department for help.

### Clearing your cache in Safari

- 1. Open Safari.
- 2. Enable the Develop menu. If you already see it, skip to step 6. Otherwise, click Safari.
- 3. Click Preferences.
- 4. Click the Advanced tab.
- 5. Check the Show Develop menu in menu bar box.

0.0.0	Advanced	
Deneral Talta AutoFil Passwords Search Sec.	rity Privacy Websites Extensions Advance	đ
Smart Search Field:	Show full website address	
Accessibility:	Never use font sizes smaller than Press Tab to highlight each item on a Option-Tab highlights each item.	
Reading List:	Save articles for offline reading auto	matically
Internet plug-ins:	<ul> <li>Stop plug-ins to save power</li> </ul>	
Style sheet:	None Selected	0
Default encoding:	Western (ISO Latin 1)	0
Proxies:	Change Settings	
	<ul> <li>Show Develop menu in menu bar</li> </ul>	7

- 6. Click the **Develop** menu.
- 7. Click Empty Caches.



## Safari (iPad/iPhone) on iOS13

Full athenaNet is accessible on the iPad and iPhone via a link on the login page. Click the link to go to the standard athenaNet login page.

We recommend using the iPad to access mobile Clinicals for out-of-office workflows. To use mobile Clinicals, just log in from the page pictured below. To switch between the two, you will need to log out and log back in using the appropriate login page.

Note: The screen captures in this section were taken using an iPad.

in co AM & Althonathealth, Inc.	c	۵	+ 0
<b>&amp;athena</b> health			
Username			
Log In			
	• Amerahaam, Inc.	• Athenahealth <b>Vathena</b> health Username Password	<b>Vathena</b> health Username Password

- 1. Verify the version you are using.
  - a. Tap Settings.
  - b. Tap General.
  - c. Tap Software update. We recommend using the latest version of iOS13.

12:39 PM Mon 26 Aug	<b>〈</b> General	হ জন 18% 🖬
Settings	Name	iPad >
CS Apple ID, iCloud, iTunes & App St	Software Version	13.0 (17A5572a)
	Model Name	iPad Air 2
Finish Setting Up Your iPad 🛛 🌖 🚿	Model Number	
	Serial Number	
E Airplane Mode		
🛜 Wi-Fi ah-visitor	Songs	
Bluetooth On	Videos	
VPN Connected	Photos	
	Applications	
Notifications	Capacity	16 GB
🚺 Sounds	Available	8.38 GB
C Do Not Disturb		
Screen Time	Wi-Fi Address	
	Bluetooth	
0 General	SEID	
Control Centre		

- 2. Disable the **Open New Tabs in Background** setting.
  - a. Tap Settings.
  - b. Tap Safari.
  - c. Under the TABS section, turn Open New Tabs in Background Off.

Settings	Safari	
	Quick Website Search	On >
Passwords & Accounts	Preload Top Hit	
🔄 Mail		
Contacts	GENERAL	
Calendar	AutoFill	
Notes	Frequently Visited Sites	
Reminders	Favourites	Favourites >
	Show Favourites Bar	
Voice Memos	Block Pop-ups	
Messages	Downloads	On My iPad >
FaceTime		
Naps 🖌	TABS	
🕗 Safari	Show Tab Bar	
Stocks	Show Icons in Tabs	
Shortcuts	Open New Tabs in Backgroun	d 🕥
	Close Tabs	Manually >

Note: iPhone users tap Open Links and then check in Background.

- 3. Block cookies.
  - a. Tap Settings.
  - b. Tap Safari.
  - c. Under the **PRIVACY & SECURITY** section, set **Block All Cookies** to Off.

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Settings	Safari	
🕑 Privacy	Show Favourites Bar	
	Block Pop-ups	
💫 iTunes & App Store	Downloads	On My iPad
Passwords & Accounts	TABS	
	Show Tab Bar	
Contacts	Show Icons in Tabs	0
Calendar	Open New Tabs in Background	$\odot$
Notes	Close Tabs	
Reminders	Allow Safari to automatically close tabs that been viewed.	
Voice Memos	PRIVACY & SECURITY	
Messages	Prevent Cross-Site Tracking	
FaceTime	Block All Cookies	
Maps	Fraudulent Website Warning	
Safari	Check for Apple Pay	
Stocks	Allow websites to check if Apple Pay is you have an Apple Card account. About Safari & Privacy	

- 4. Enable JavaScript.
  - a. Tap Settings.
  - b. Tap **Safari**.
  - c. Tap Advanced.
  - d. Set JavaScript to On.



- 5. Disable pop-up blocking.
  - a. Tap Settings.
  - b. Tap Safari.
  - c. Set Block Pop-ups to Off.



- 6. For older iPads, we recommend using locking rotation. This function is optional and may not be available. a. Tap **Settings**.
  - b. Tap General.
  - c. Use Side Switch should be set to Lock Rotation (this allows you to use the switch on the side of the iPad next to the volume buttons to lock rotation of the screen).
- 7. athenahealth strongly recommends that you close all applications other than Safari when using athenaNet on your iPad or iPhone.
  - a. Double-click the round home button on your device. This will show all the applications that are running.
  - b. Swipe upwards on each application to close it. Leave Safari open.

## Chrome

- 1. Verify that you are using the latest version of Chrome.
  - a. Open your Chrome browser.
  - b. Click the Chrome menu button i on the browser toolbar.
  - c. Click on **Help**.
  - d. Click **About Google Chrome**. Chrome will determine if an update is available and perform the update if necessary.
- 2. Verify that you are not logged into Chrome with your Google Account.
  - a. Open your Chrome browser.
  - b. Click the Chrome menu button 🛄 on the browser tool bar.
  - c. **Sign in to Chrome** button will appear if you are not logged into Chrome. You can now properly configure Chrome for use with athenaNet. If not, continue to step 4.
  - d. **Disconnect your Google Account** button will appear if you are currently logged in with your Google account. Click this button to sign out of Chrome. A second window will appear.
  - e. Click Disconnect account.
  - f. You should now see the **Sign in to Chrome** button. You can now properly configure Chrome's settings for use with athenaNet.

## Required settings for athenaNet in Chrome

Below is a summary of all athenaNet support settings with both a description of the setting and the supported value that should be set in Chrome. If you are using a PC, you should set these settings automatically by downloading athenaNet © 2019 athenahealth, Inc. Configure your Computer for athenaNet - Page 10 of 17

Device Manager and running the configure browser functionality available on the login screen or the Configure Browser admin page. More information is available in the <u>Automatically Configure Chrome</u> section. Otherwise, you can set these settings manually following the instructions in the <u>Manually Configure Chrome</u> section.

Settings	Reason	Supported Value
Auto-fill forms	Automatically fills form fields with previously entered data	Off
Save passwords	Allows your browser to save passwords	Off
Allow pop-ups for the following sites: <ul> <li>https://[*.]athenahealth.com</li> <li>https://secure.athenahealthpayment.com</li> <li>https://[*.]csod.com</li> <li>https://[*.]webex.com</li> </ul>	Allow pop-ups	On
Default print margins	Sets the default page margins for printing	0.25"

#### About athenaNet Device Manager

athenaNet Device Manager (ADM) is an application that runs on your computer and manages the modules that athenaNet functionality needs to integrate with your computer.

When ADM is downloaded and running, ADM allows you to automatically configure the browser's settings for use with athenaNet and to clear the browser's cache.

Note: ADM only works with Chrome and Edge on the PC.

Download ADM from the athenaNet login screen.
 Note: Depending upon your practice's settings, you may need to work with your IT department to download ADM.

Display the athe	enaNet login screen (https://athenane	t.athenahealth.com).
athenahealth		athenaNet
		Username
		Password
		Forgot password?   Configure browser
		Log In

- b. Click the **Configure browser** link. A new tab will open.
- c. In the athenaNet Device Manager section, click the **download installer** link next to the **Version** field in the athenaNet Device Manager section.

athenaNet D	evice Manager
Status	Not connected
Version	download installer

d. Double-click the file that appears in your downloads bar.

P		VELOP
3	athenaNetDeviceMaexe	*

e. Complete the installation wizard.

2. Once you do so, ADM is installed. When ADM is properly installed and running on your computer, you should see the following in the athenaNet Device Manager section:

athenaNet Devic	e Manager
Status	e Running
Version	1.5.4.0
Hide advanced ADM file	es
1.5.4.0 EXE file 🛈	athenaNetDeviceManagerSetup.exe
1.5.4.0 MSI file 🛈	athenaNetDeviceManager.msi
1.1.0.0 EXE file 🛈	athenaNetDeviceManagerUninstaller.exe

**Note**: If you do not see this status or are having additional issues, see the <u>Using ADM</u> documentation for troubleshooting steps.

## Automatically configure Chrome using ADM

1. Display the athenaNet login screen.

Vathenahealth		<b>athena</b> Ne	t
		Username	
		Password	Forgot password?   Configure browser
			Log in

- 2. Click the **Configure browser** link. A new tab will open.
- 3. Confirm you see the following in the athenaNet Device Manager section.

athenaNet Devic	e Manager
Status	e Running
Version	1.5.4.0
Hide advanced ADM fil	es
1.5.4.0 EXE file ①	athenaNetDeviceManagerSetup.exe
1.5.4.0 MSI file 🛈	athenaNetDeviceManager.msi
1.1.0.0 EXE file 🛈	<u>athenaNetDeviceManagerUninstaller.exe</u>

**Note**: If you see a **download installer** link, see the <u>About athenaNet Device Manager</u> section for more information. If you do not see this link and are instead having other issues, see the <u>Using ADM</u> documentation for troubleshooting steps.

#### 4. Click the Update Settings button.

The following browser setting	gs do not adhere to the supported configuration for athenaNet. To fix you	r configuration, click <b>Up</b>	date Settings.
Setting	Description	Current Value	Supported Value
Required			
Auto-fill forms	Automatically fills form fields with previously entered data.	On	Off
Default print margins	Sets the default page margins for printing.	Other value	0.25"
Save passwords	Allows your browser to save passwords	On	Off

5. Click OK.

- 6. Your browser is now properly configured for athenaNet. If you want to confirm that your settings have been properly set, click the **Configure browser** link on the athenaNet login screen.
- 7. You should see a green success message in the Browser Setting section.



### Manually configure Chrome

- 1. Disable autofill and save password functionality.
  - a. Click the Chrome menu button i on the browser toolbar.
  - b. Select Settings.
  - c. Click Show advanced settings and find the Passwords and forms section.
  - d. Deselect the Enable Autofill to fill out web forms in a single click and the Offer to save your web passwords check boxes.

Settings	Search settings
Enable "Ok Google" to start a voice search	
Passwords and forms	
Enable Autofill to fill out web forms in a single click. Manage Autofill settings	
Offer to save your web passwords. Manage passwords	

- 2. Remove saved athenaNet passwords.
  - a. Click the Chrome menu button i on the browser toolbar.
  - b. Select Settings.
  - c. Click Show advanced settings.
  - d. Click Manage Passwords under Passwords and forms.

F	Passwords and forms
	Enable Autofill to fill out web forms in a single click. Manage Autofill settings
	Offer to save your web passwords Manage passwords

- e. Under Saved passwords, hover over the site whose password you'd like to remove.
- f. Click the **X** that appears on the right.
- g. Click Done.
- 3. Allow pop-ups. Many features in athenaNet open in pop-up windows, so it is important to disable pop-up blockers in Chrome. To do so:
  - a. Click the Chrome menu button i on the browser toolbar.
  - b. Select Settings.
  - c. Click Show advanced settings.

- d. Click Content settings under privacy.
- e. Under popups click Manage exceptions.

Content settings	×
Detect and run important plugin content (recommended)	-
Let me choose when to run plugin content	
Manage exceptions	
Manage individual plugins	
Pop-ups	
Allow all sites to show pop-ups	
Do not allow any site to show pop-ups (recommended)	
Manage exceptions	
Location	
Allow all sites to track your physical location	
Ask when a site tries to track your physical location (recommended)	
Do not allow any site to track your physical location	
Manage exceptions	
Notifications	
Allow all sites to show notifications	
Ask when a site wants to show notifications (recommended)	+
	Done

- f. Allow pop-ups for the following sites:
  - https://[\*.]athenahealth.com
  - https://[\*.]athena.io
  - https://[\*.]secure.athenahealthpayment.com
  - https://[\*.]csod.com
  - https://[\*.]webex.com
  - https://[\*.]kenexa.com
  - https://[\*.]walkme.com
- g. Click Done.
- h. Click **Done** again.
- 4. Set your print margins in Chrome.
  - a. Open your chrome browser.
  - b. Hit Ctrl+P.
  - c. In the Margins dropdown select Custom.
  - d. Chrome defaults to margins of .4". Use the margin lines in the print preview to set all margins to .25".

Print Total: 1 page	Save			0.25"	
Destination Sa	ve as PDF		Goo	gle	
Pages   All  E.g.	1-5, 8, 11-13	5			
Paper size Letter	*			- In-	
Layout <ul> <li>Portr</li> <li>Land</li> </ul>		0.25*		· · ·	0.25"
Margins Custor	n 👻				
	lers and footers ground colors and images				
Print using system dialog.	. (Ctrl+Shift+P)		0.257		

Note: Chrome sets print margins by printer. If you use multiple printers, you should set the print margins for every printer that you use.

### Automatically clear your cache in Chrome using ADM

1. Display the athenaNet login screen.

athenahealth		<b>athena</b> Ne	t
		Username	
		Password	
			Forgot password?   Configure browser
			Log In

- 2. Click the **Configure Browser** link. A new tab will open.
- 3. Confirm you see the following in the athenaNet Device Manager section:



**Note**: If you see a **download installer** link, see the <u>athenaNet Device Manager</u> section for more information. If you do not see this link and are instead having other issues, see the <u>Using athenaNet Device Manager</u> for troubleshooting steps.

#### 4. Click Clear Cache.

Browser Cache
Routinely clearing your browser cache ensures you are viewing the most recent version of each athenaNet page.
Clear Cache

5. Click **OK**.

## Manually clear your cache in Chrome

- 1. Open your Chrome browser.
- 2. Click the Chrome menu button i on the browser toolbar.
- 3. Click Settings.
- 4. Click Show advanced settings.
- 5. Under Privacy, click Clear browsing data.
- 6. In the **Obliterate the following items from**: drop-down list, specify **the beginning of time**.
- 7. Make sure that **Cookies and other site and plug-in data** and **Cached images and files** are both checked.

Obliterate the following items from:	the beginning (	of time 🔻		
Browsing history				
Download history				
Cookies and other site and plug-i	in data			
Cached images and files				
Passwords				
Autofill form data				
Hosted app data				
Content licenses				
earn more		Clear browsing c	lata	Cancel
aved content settings and search eng	iner will not be	cleared and may	roflact	/01/7
prowsing habits.	inco will not be	creates and ma	, nemecc	(our

8. Click Clear browsing data.

## Edge

**Note:** Please follow the same steps as Chrome for Edge.