



Helios v1.0.5 Installation and Setup Guide

Helios Pre-Installation

Please review the following before proceeding with the installation of Helios.

Required Steps

- The **Use custom address fields** checkbox must be selected (Setup→User Interface→User Interface). Several custom fields in the Helios package use this data type, which cannot be enabled through the installation process.
- **Enhanced Notes** must be enabled. (Setup→Feature Settings→Sales→Notes Settings). Multiple Lightning Pages in the Helios package are configured to use enhanced notes functionality.

Recommended Steps

- Configure and enable **State and Country/Territory Picklists**. Though not required for installation, this will ensure better reliability with solution automation, and overall Helios user experience.
- Always use the **Lightning Experience**. The user experience of Helios has not been tailored to functionally work with Classic.

Helios Installation

It is recommended to apply the **Install for Admins Only** option for the installation process. Included permission sets have been configured to provide users with necessary permissions upon assignment.

Helios Post-Installation

Thee following post-installation actions are necessary before using Helios

Assign Users

Helios users, at minimum, require a **Salesforce Platform Starter** license, in addition to a Helios standard license, to use the features of the application. Since all access is granted through permission sets, there are no profile related dependencies.

Assign Permission Sets

Helios includes three permission sets, which align to the three primary apps (and related features) included in the Helios package.

- **Helios Program Management** - Users assigned to this permission set are able to configure academic programs that will be managed within Helios. This also includes the ability to set up related items like terms, courses, classes, campuses, registration requirements, completion requirements, and instructors. Users will be granted access to the **Helios Program Manager** app. (Typical role: Program administrators)
- **Helios Enrollment Management** - Users assigned to this permission set process the workflows related to registering students into academic programs and terms, along with assigning enrollments for students, and issuing academic credits. Users will be granted access to the **Helios Enrollment Manager** app. (Typical role: Program registrars)
- **Helios Student Management** - Users assigned to this permission set have access to view and manage information about students, including parents/guardians, households, and academic records. However, this permission set does not provide the ability to process student-related workflows. Users will be granted access to the **Helios Student Manager** app. (Typical role: Program registrars or counselors)

Assign Run Flows Permission

For a better user experience, it is also recommended to assign the following System Permissions to Helios users.

System Permission	Description
Access Activities	For users who need to track workflow actions related to program/term registrations.
Create and Customize List Views	Allowing users to work with list views in an efficient and supportive way.
Edit Tasks	For users who need to track workflow actions related to program/term registrations.
Hide Option to Switch to Salesforce Classic	The Helios user experience is designed to work well in Lightning experience, with limited support in Classic.
Import Custom Objects	Providing ability to bulk import Helios records, like Courses, Students, or Instructors.
Lightning Experience User	The Helios user experience is designed to work well in Lightning experience, with limited support in Classic.
Mass Edits from Lists	Allowing users to work with list views in an efficient and supportive way.
Multi-Factor Authentication for User Interface Logins	MFA enforcement
Select Files from Salesforce	For associating Salesforce Files with one or more Helios records
Transfer Record	For users to reassign record owners within a Helios workflow.

Assign Helios Theme (Optional)

The Helios package includes a branded Salesforce theme that can be applied, if desired. (Setup→User Interface→Themes and Branding).