Notes:

The Primary Sense software **does not make any changes** to the practice data. All data requests are read-only, and extracted data is not stored on the computer or server. The Extractor Installation must be completed before the Desktop installs

Supported Operating Systems

Primary Sense is supported on the following Microsoft Windows[®] operating systems

Desktop	END of LIFE
Windows 11	The following operating systems are no longer
Windows 10	supported by Microsoft or Best Practice
Windows 8.1	 Windows 7 with Service Pack 1
Server	Windows Server 2008 R2with Service Pack 1
Windows Server 2022	but is also not supported
Windows Server 2019	We recommend you upgrade your operating
Windows Service 2016	system to continue to receive security and quality
Windows Server 2012 R2	updates.
Windows server 2012	

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Prepare for Installation – **Best Practice**

Make sure you read all the instructions prior to installation, any error in interpretation of these instructions may cause the installation to fail. If you have any questions prior to or during installation, please contact your Primary Health Network (PHN).

Down	load	Soft	ware
	louu	5010	vuic

- 1. Download the Primary Sense Desktop installer using the link in the '**Welcome to Primary Sense**' email. Please note the msi is region (PHN) <u>specific</u>. Ensure the link you are using is from the correct email.
- 2. You will need to be logged in to Microsoft Windows with a **privileged user account** with sufficient authorisation to install applications, such as an administrator.
- 3. Run the *Primary Sense Desktop.msi* installer once it has completed downloading.

There is not much to see after this installation completes as the installation merely comprises a machine-wide installer which gets Primary Sense ready for individual user install.

4. Check that the installation was successful by opening up the list of installed applications and searching for Primary Sense.

Apps & features Manage optional features Manage app execution aliases Search, sort, and filter by drive. If you would like to uninstall or move an app, select it from the list. primary sense x Sort by: Name ✓ Filter by: All drives ✓ Primary Sense Desktop Machine-Wide Installer 10.3 MB 13-May-19

Check Firewall and Antivirus
Firewalls and antivirus software will interfere with the correct operation of Primary Sense
You must allow the following domains through your firewall, and ensure Primary Sense is whitelisted in your
antivirus. All domains will be available over a secure connection only (https)
Address
*.primarysense.org.au
Note: code signing has been applied to all files, include the exe. We recommend whitelisting the exe at a
certificate level by creating a rule in your antivirus software.
Check Folder Access

You must allow the Primary Sense software "read and write" access to the following folder and its subfolder in your antivirus. This applies to all users who will use Primary Sense software.

Folder

C:\programdata\primary sense\

In C:\ProgramData\Primary Sense, right click on Properties. In the Security tab, check the permissions are enabled to give Users full control. Select Users> Edit> Select Full control > Select Apply

Note: This folder is only created on install and is often a cause of failure if it cannot be created or written to.

You are now ready to configure the database settings and set up the first user on this device. You will need the Practice credentials (Client ID & Secret located in the **Welcome to Primary Sense** email) and the database connection for Best Practice.

Setup

Logout as an administrator and then log back in as a user*

- 1. The Primary Sense Desktop will be installed automatically without any visible sign and then the Primary Sense Desktop setup window will open as soon as the installation completes
- 2. With the setup window open you are ready to configure the practice and database settings. This will need to be completed once for **each PC.**

*Terminal server / remote desktop setup: if you are using a terminal server / remote desktop setup, we recommend completing a 'force log-off' for all user sessions on the server in order to trigger the machine-wide install. The Primary Sense shortcut should automatically be created on user login.

Notes:

- If the setting pane does not open, or to access it in the future, it can be selected from your Windows Start Menu
- If it is not visible in your Start Menu, start typing "Primary" and the Primary Sense Desktop application should appear in the Start Menu search list
- To complete the setup for each PC, you will need to configure the practice and database setting once. This will configure the application for all users who use the PC

Configure Practice Settings

The Primary Sense Desktop setup window will appear, or double click Primary Sense settings icon to display the settings window.

Primary Sense™ Settings Practice Connection Practitioner Advanced		Select the Practice tab and enter the prac credentials – these are located in the 'Welcome to Primary Sense' email you received. From the email:
Client ID Client Secret	Enter your practice client ID Enter your practice client secret	 a. Copy and paste the Client ID (practice b. Copy and paste the Client Secret
Practice Name Practice Software	Enter your practice token	(practice password)c. Click the [] ellipses button
		It will take a moment to identify the pract details.
	<u>O</u> K <u>C</u> ancel	NB: When it has Authenticated the practic identified, the Name and Software will be

	displayed. This cannot be changed. If the Authentication fails or if the Practice name or software is shown to be incorrect, please contact the PHN to set it up correctly.
× Primary Sense™ Settings	Select the Connection tab, then "change database Connection."
Practice Connection Practitioner Advanced Connection Method Use Database Connection Change Database Connection Best Practice 3rd Party Support 	Set up the Practice Software Database Connection, as per the screenshot below (this should reflect the settings in the Primary Sense Services - Extractor Setup).
<u>O</u> K <u>C</u> ancel	
	In the Change Database Connection popup:
Primary Sense [™] Database Connection to Best Practice ? × Data source: Microsoft SQL Server (SqlClient) Change Server name: Change Server name: Change Server name: OUse Windows Authentication Use Windows Authentication	 a. Check the Server name and change if not correct: <server name="">\BPSINSTANCE</server> b. Ensure SQL Server Authentication is selected, and the BPSPartner details have populated c. Ensure the database name is BPSPatients d. Click 'Test Connection' e. If succeeded, click 'OK'
User name: BPSPartner	e. In succeeded, click OK
Password: •••••••	
Select or enter a database name: BPSPatients Attach a database file: Logical name:	NB: these settings will be configured automatically and should work for most installations. If the server or database are different, configure as required. Note that you <u>must</u> connect using SQL Server Authentication method, using the pre- populated BP partner details
Test Connection	Click the OK button to save the settings, otherwise click Cancel to exit the Settings window.

Database Connection

If your practice is running Best Practice, you will need to configure third party integration to allow Primary Sense to access the database. If you have successfully completed the Primary Sense Extractor installation, you will have completed this step.

You can configure third party integration by selecting 'Setup' within Best Practice, then selecting 'Configuration' and then 'Database.' Click the Setup third-party integrations button and then scroll down the list of third-party providers and tick 'Primary Sense.' Click Save, then Save again.

Practitioner Settings		
Primary Sense™	× Settings	Make sure Best Practice is open and running.
Practice Connection Practitio <u>n</u> er	Practitioner Advanced	Navigate to the Practitioner tab in Primary Sense, then select the name of the user from the drop down list.
Alerts	 Play Sound Pop to Front 	It may take a moment to display all practice users.
Telemetry	Send <u>usage</u> data to Primary Sense	If users are not displayed in the list, check your database connection, and try again.
	<u>O</u> K <u>C</u> ancel	Once setup, you do not need to change/select a practitioner if the PC already has Best Practice installed, as the Desktop will detect the currently logged in user.

Primary Sense™ Settings Practice Connection Practitioner Advanced Practitioner Dr A Practitioner ▼ Alerts Dr A Practitioners ▼ Dr Evan Huesami Dr I Feelgood Practice Manager Raechel Receptionst Registered Nurse Sally Physio	NB: Practitioner List If the correct practitioner name is not listed, you will need to set up the practitioner in your practice software. Contact your practice software vendor for help on setting up a practitioner.
×	Practitioner Selected
Primary Sense™ Settings	Once you have selected the correct
Practice Connection Practitioner Advanced	to confirm your choice.
Settings Are you sure that you want to select "Dr A Practitioner" as the practitioner?	Click Yes to confirm or No to re-select a different user.
IMPORTANT: The correct practitioner must be selected	NB: Please ensure <i>a user</i> is selected before
before using this software.	proceeding – this does not need to be a
Tes II.o	practice manager) – Primary Sense will
<u>Q</u> K <u>C</u> ancel	automatically detect the user logged in to Best Practice in future, but only after a user is initially selected on setup.

The following practitioner settings are also available:			
Play Sound	A beep sound is played when a medication alert is presented		
Pop to Front	to Front Medication alerts are displayed on top of other windows whenpresented		
Send usage data to	Error details are sent to Primary Sense to help improve the software		
Primary Sense			
These settings are stored in the user's Windows profile and are copied to any computer if Roaming User			
Profiles are set up on your network			

Primary Sens	e™ Settings ection Practitioner Advanced	The Command Timeout and Environment settings should only be changed if directed to by Primary Sense support staff.
Command <u>T</u> imeout <u>E</u> nvironment Demo Mode	300 Seconds Production Enable demo mode Enabling demo mode will bypass a local practice software database connection and return random personal information for patients and practitioners. WARNING: Changing demo mode will restart Primary Sense Desktop.	These are set to the following defaults:Command Timeout300 SecondsEnvironmentProductionClick the OK button to save your settings, otherwisclick Cancel to exit the Settings window
	<u>Q</u> K <u>C</u> ancel	

Starting Auto	matically				
To ensure that Primary Sense Desktop starts every time that you logon, you will need to add a shortcut to it in your startup folder. First locate the Primary Sense Icon on your desktop					
Prim Sen R i386 R i386 R x64 R x64	Open Open file location Troubleshoot compatibility Pin to taskbar Compare with Araxis Merge Queue for Comparison Restore previous versions Send to Cut Copy Create shortcut Delete Rename Properties	▼ me op op a a ne ares	Now right click on the icon and click <i>Cop</i> y		

		Click on the Start Button, in the search box				
All Apps Documents Web More ~	🥶 e ^e	type in "Run" and press the Enter key				
Best match						
I 🖾 App	7					
Apps Run						
App Command Prompt >	2					
Settings 🕜 Open						
Run programs made for previous						
versions of Windows 🔗 Pin to Start						
Allow local PowerShell scripts to run without signing						
Search work and web						
,Q nun 3 - See work and web results						
	t					
,⊅ run →						
Q run 2 >						
		In the Run box type "shell:startun" and press				
💷 Run	×	the enter key				
Type the name of a program, folder, docume						
resource, and Windows will open it for you.						
Openi	~					
OK Cancel	Browse					
AppData > Roaming > Microsoft > Windows > Start Menu > P	Programs > Startup	You should now be presented with your				
^ Date modified Type	Size	startun folder				
	This folder is empty.	Convithe Primary Sense Icon in to the Startun				
	folder					
Primary	Primary					
Sense						

Verify Setup				
Image: Settings Alerts Image: Verify Settings Image: Settings Image: Help F1 Image: Provide Feedback Patients	 Right-click the notification icon and click Verify Settings to verify: The latest version of Primary Sense Desktop is installed Connection to the practice software database is successful Connection to Primary Sense servers/API is successful 			
Completed Time Category Message 10:49 AM Info Verifying version 10:49 AM Info Verifying version 10:49 AM Success Latest version is installed 10:49 AM Success SQL connection successful (State = Open) 10:49 AM Info Verifying API connection 10:49 AM Success API connection successful ("Primary Sense" API [Version 0.9.1 10:49 AM Success Verification completed	Results of the verification tests will be displayed in a log list window. Click the Log File button to open the daily log file in the default text editor. Double-click entries in the log list to display more details, for example to view an error log entry.			
Log File <u>C</u> lose	guide for further assistance.			

Updates

When the *Primary Sense Desktop* application starts, it will automatically check to see if an update is available. If an update is available, the update will beapplied automatically.

Troubleshooting

<u>Troubleshooting guide</u> – detailed troubleshooting steps and screenshots are available in the troubleshooting guide.

Quick troubleshooting steps:

- If the database connection fails, confirm you have set up Third party Integration for Primary Sense in Best Practice. Use the Database Connection settings to set up and test the database connection.
- If the Primary Sense API connection fails, check your network, internet connection, Firewall and Antivirus.
- If Primary Sense is using excessive database resources or otherwise causing an issue, please right-click and select Exit to close the application and contact the PHN.

Recommendations

Primary Sense recommends the following:

- Run Windows Update after installation to ensure all security and quality updates are installed.
- Install the latest available version of the Microsoft .Net Framework.
- Ensure your system backup software and processes are in place and working correctly.