Primary Sense Desktop Installation – BEST PRACTICE

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 supported by Microsoft or Best Practice
• Windows 10	• Windows 7 with Service Pack 1
• Windows 8.1	• Windows Server 2008 R2with Service Pack 1
Server	Primary sense may run on these operating systems but is also not supported.
• Windows Server 2022	We recommend you upgrade your operating system to continue to receive security and quality updates.
• Windows Server 2019	
• Windows Service 2016	
• Windows Server 2012 R2	
• Windows server 2012	

Contents

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).

Download Software

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 ✕

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.

<table>
<tr><td>Folder</td></tr>
<tr><td>C:\programdata\primary sense\</td></tr>
</table>

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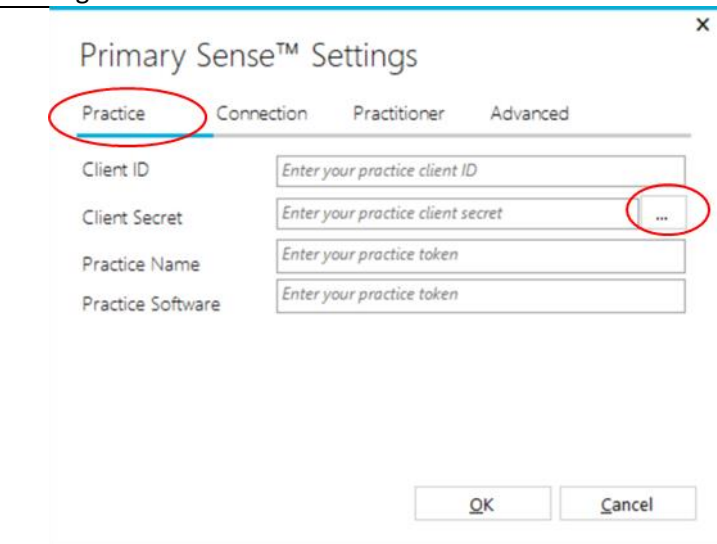
*Terminal server / remote desktop setup: if you are using a **terminal server / remote desktop** setup, we recommend completing a 'force log-off' for all user sessions on the server in order to trigger the machine-wide install. The Primary Sense shortcut should automatically be created on user login.

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.
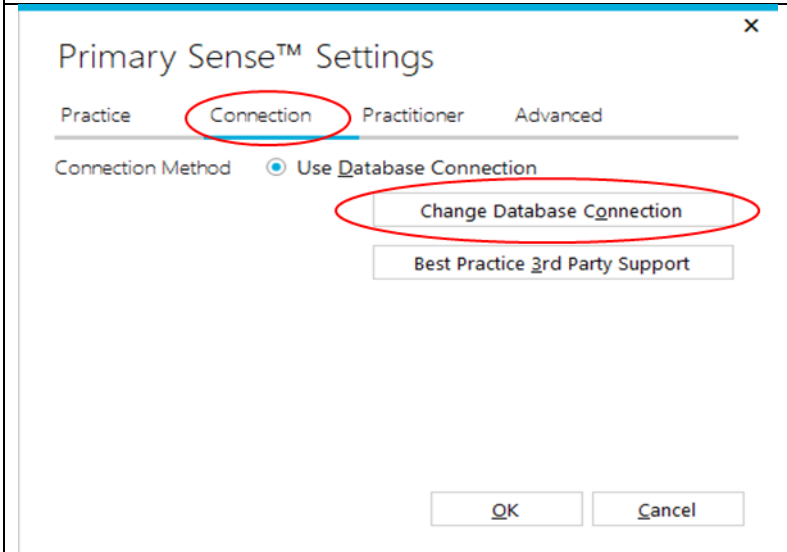

Select the **Practice** tab and enter the practice credentials – these are located in the 'Welcome to Primary Sense' email you received. From the email:

a. Copy and paste the **Client ID** (practice ID)
b. Copy and paste the **Client Secret** (practice password)
c. Click the **[…]** ellipses button

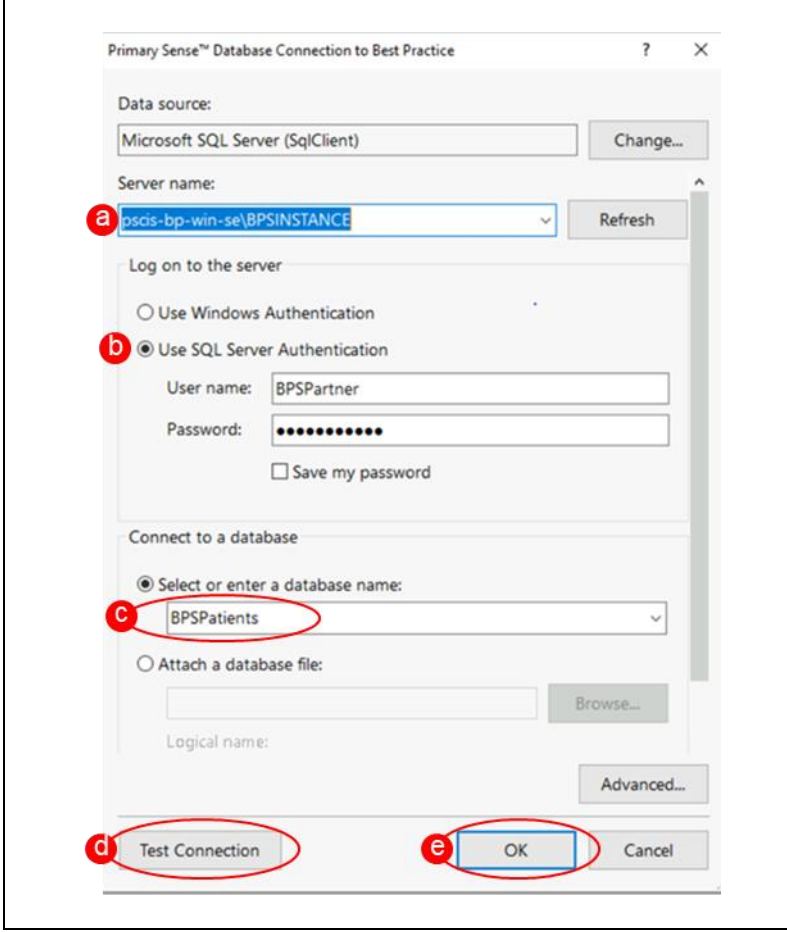It will take a moment to identify the practice details.

NB: When it has Authenticated the practice is identified, the Name and Software will be

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	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.
	Select the **Connection** tab, then "change database Connection." Set up the Practice Software Database Connection, as per the screenshot below (this should reflect the settings in the Primary Sense Services - Extractor Setup).
	In the **Change Database Connection** popup: a. Check the Server name and change if not correct: **<server name>\BPSINSTANCE** 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**' *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 must connect using SQL Server Authentication method, using the pre-populated BP partner details* Click the OK button to save the settings, otherwise click Cancel to exit the Settings window.
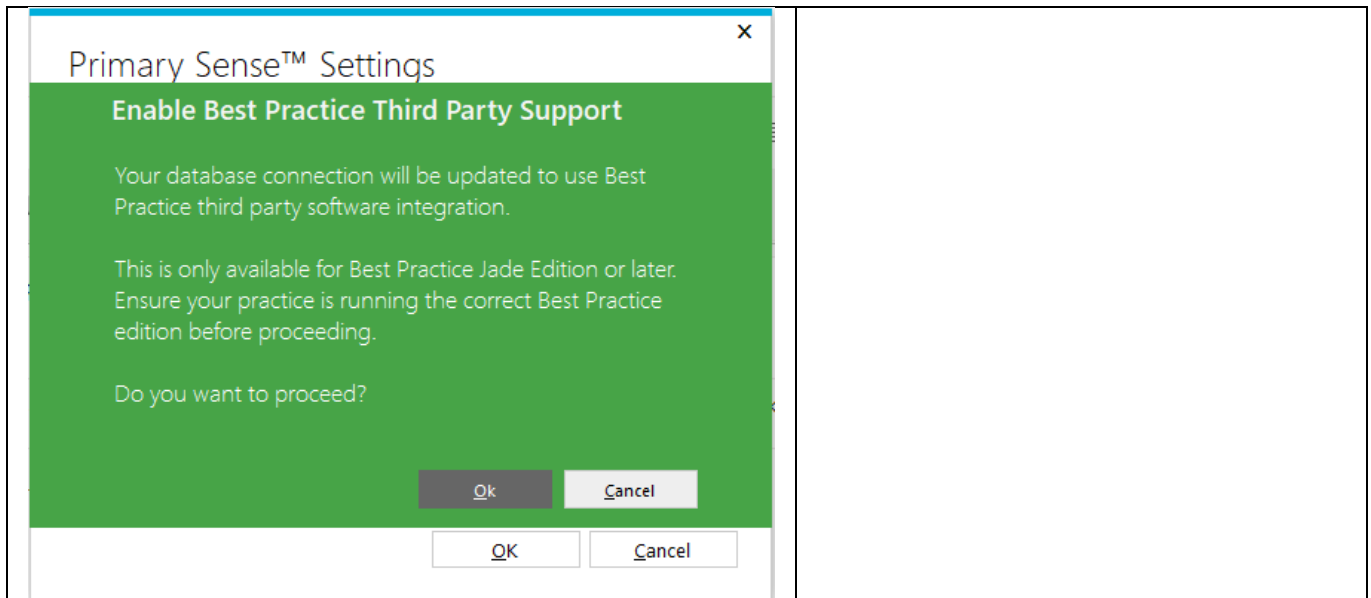
Database Connection

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.
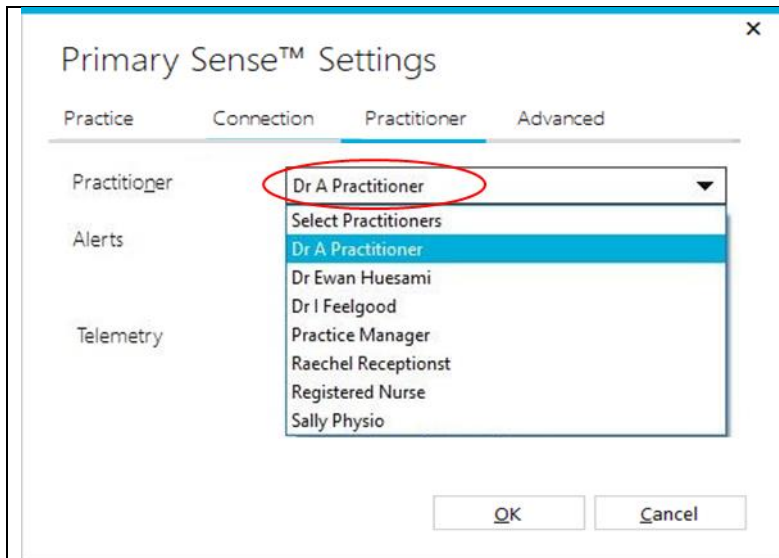
Practitioner Settings
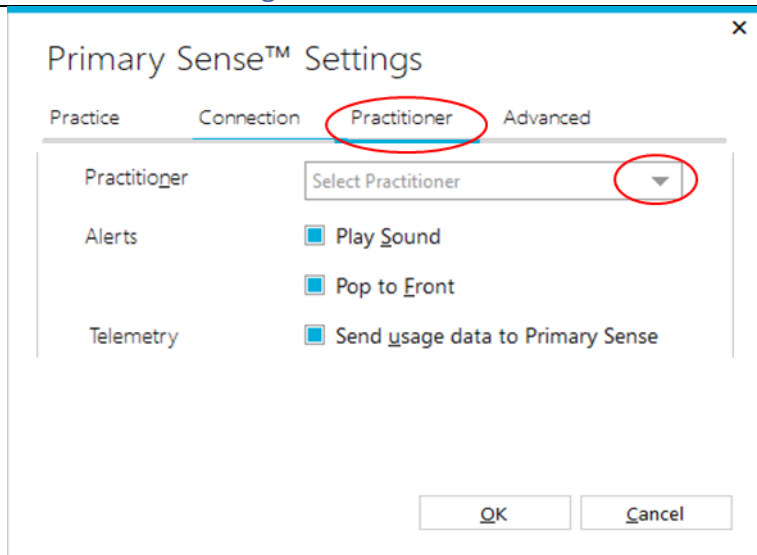
Make sure Best Practice is open and running.

Navigate to the **Practitioner** tab in Primary Sense, then select the name of the user from the drop down list.
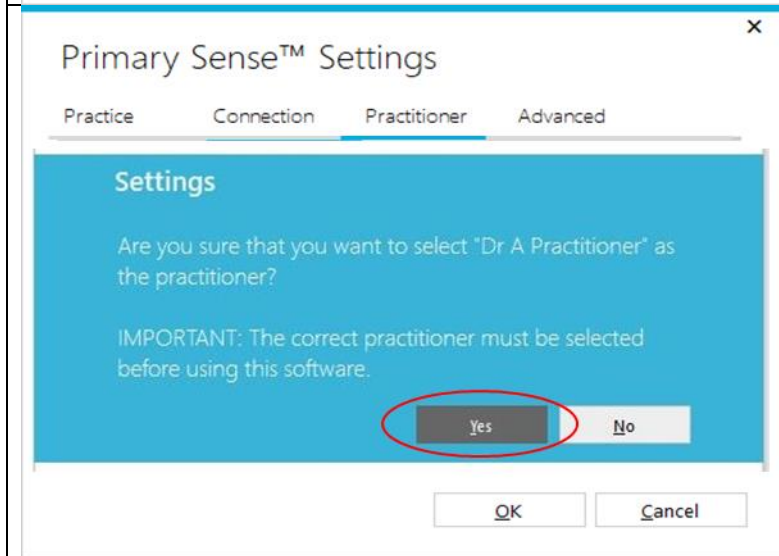
It may take a moment to display all practice users.

If users are not displayed in the list, check your database connection, and try again.

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.

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	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 Once you have selected the correct practitioner / users name, you will be asked to confirm your choice. Click **Yes** to confirm or **No** to re-select a different user. NB: Please ensure *a user* is selected before proceeding – this does not need to be a general practitioner (i.e. the user may be a practice manager) – Primary Sense will 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	Medication alerts are displayed on top of other windows whenpresented
Send usage data to Primary Sense	Error details are sent to Primary Sense to help improve the software
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	

Advanced Settings
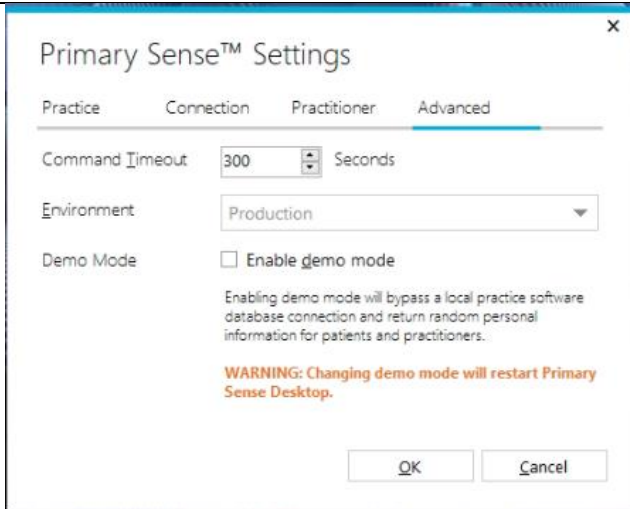
The Command Timeout and Environment settings should only be changed if directed to by Primary Sense support staff.

These are set to the following defaults:
Command Timeout   300 Seconds
Environment   Production

Click the *OK* button to save your settings, otherwise click *Cancel* to exit the *Settings* window
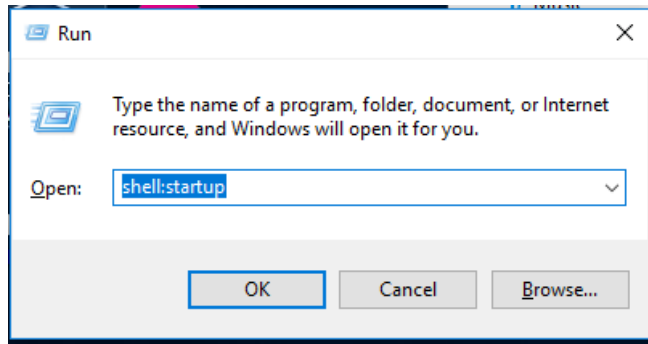
Starting Automatically

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
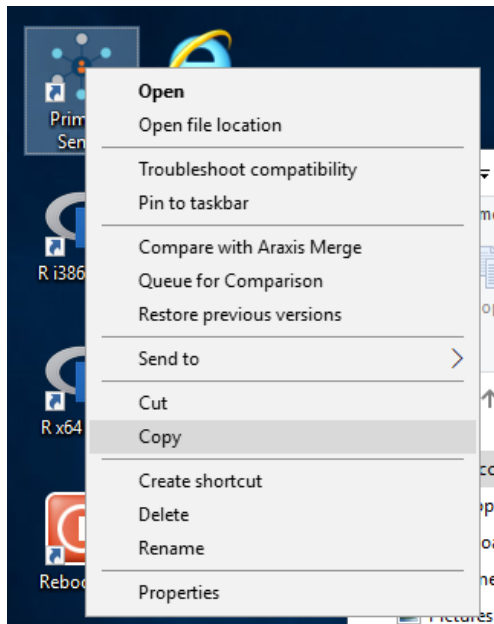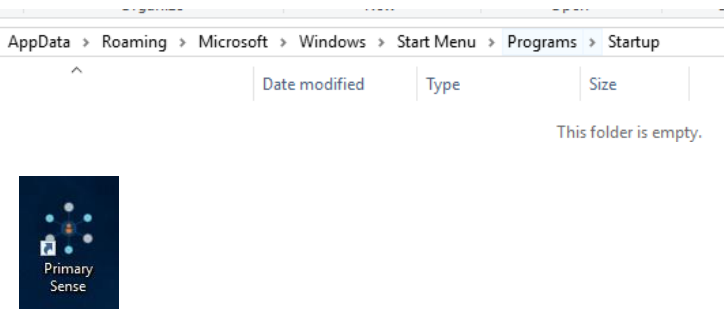

Now right click on the icon and click *Copy*
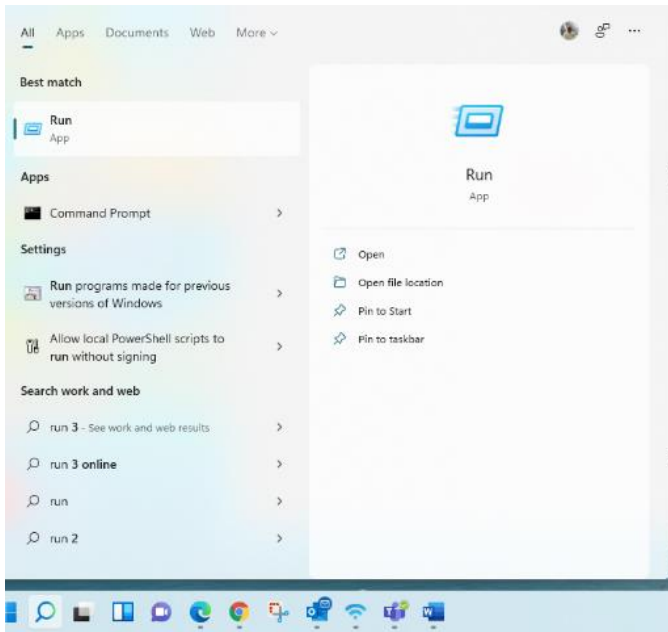
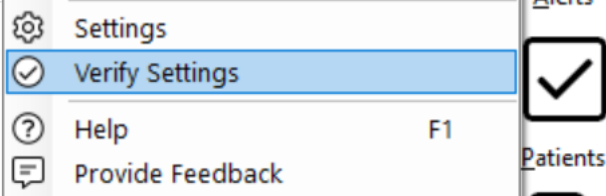|	
	Click on the Start Button, in the search box type in "Run" and press the Enter key
	In the Run box type "shell:startup" and press the enter key
	You should now be presented with your startup folder Copy the Primary Sense Icon in to the Startup folder.

Verify Setup	
	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
	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. **If errors are present, consult the troubleshooting 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	
Troubleshooting guide – 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.	