

Primary Sense Desktop Installation – MEDICAL DIRECTOR

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	<p>END of LIFE</p> <p>The following operating systems are no longer supported by Microsoft</p> <ul style="list-style-type: none"> • Windows 7 with Service Pack 1 • Windows Server 2008 R2with Service Pack 1 <p>Primary sense may run on these operating systems but is also not supported.</p> <p>We recommend you upgrade your operating system to continue to receive security and quality updates.</p>
• Windows 11	
• Windows 10	
• Windows 8.1	
Server	
• Windows Server 2022	
• Windows Server 2019	
• Windows Service 2016	
• Windows Server 2012 R2	
• Windows server 2012	

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Prepare for Installation – Medical Director

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).

Configure Third Party Integration – Medical Director

(Note – this step may have been done during installation of Primary Sense Extractor. In this case note the database credentials and move to the next step)

To install Primary Sense for Medical Director, you will need to run the SQL script below. This script will set up a read only user account 'PHNUser' which will be used by Primary Sense Services to access your database.

Replace the <insert password here> text with a secure random password. **(you will need this later make sure you keep this password)**

Run the script on your Medical Director SQL Database using Microsoft SQL Management Studio.

```
USE [master]
GO
-- Password used needs to be given to Practice Manager for use during Desktop and Services installations.
CREATE LOGIN [PHNUser] WITH PASSWORD=N'<insert password here>', DEFAULT_DATABASE=[master],
DEFAULT_LANGUAGE=[us_english], CHECK_EXPIRATION=OFF, CHECK_POLICY=OFF
GO
-- CREATE USER on HNC Database
USE [HCN]
GO
CREATE USER [PHNUser] FOR LOGIN [PHNUser]
GO
ALTER USER [PHNUser] WITH DEFAULT_SCHEMA=[dbo]
GO
-- Apply correct role to new user
EXEC sp_addrolemember N'db_datareader', N'PHNUser'
GO
-- CREATE USER on HNC_CONTENT Database
USE [HCN_CONTENT]
GO
CREATE USER [PHNUser] FOR LOGIN [PHNUser]
GO
ALTER USER [PHNUser] WITH DEFAULT_SCHEMA=[dbo]
GO
-- Apply correct role to new user
EXEC sp_addrolemember N'db_datareader', N'PHNUser'
GO
```

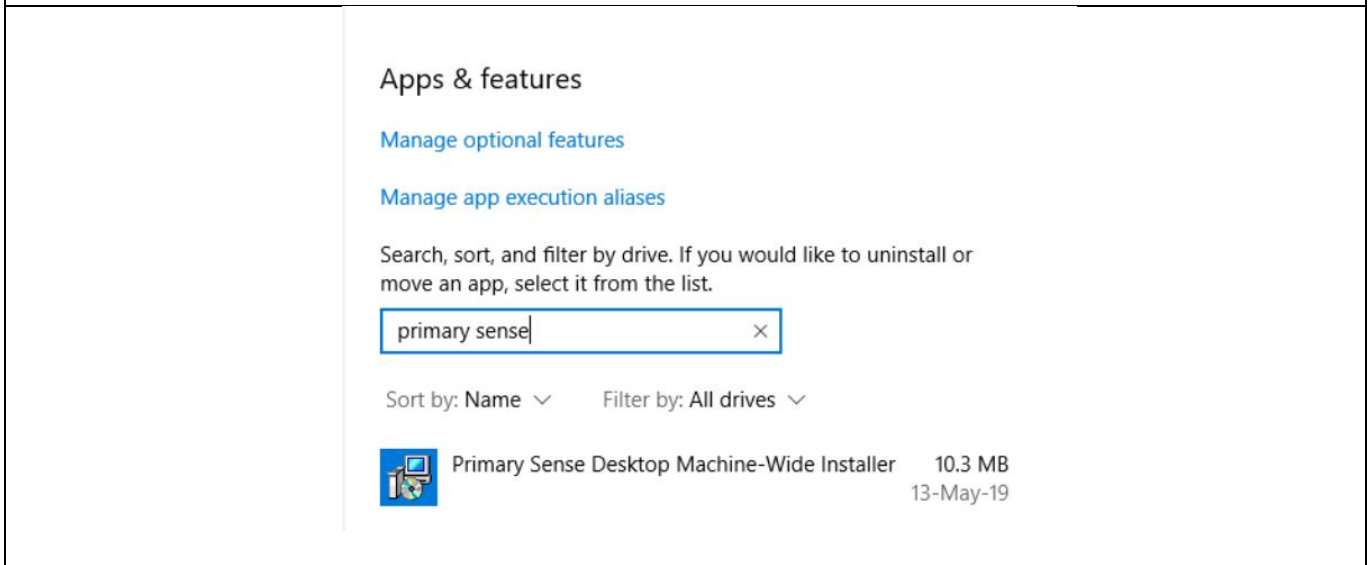
NB: You will need the user name : PHNUser and password above during the Primary Sense Desktop configuration.

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) specific. 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.



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 Medical Director.

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**.

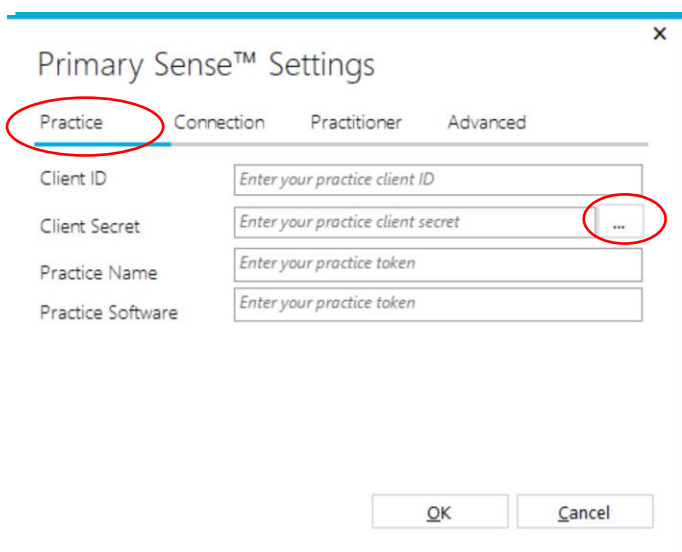
***Terminal server / remote desktop setup:** if you are using a **terminal server / remote desktop** setup, we recommend completing a 'force log-off' for all user sessions on the server in order to trigger the machine-wide install. The Primary Sense shortcut should automatically be created on user login.

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.

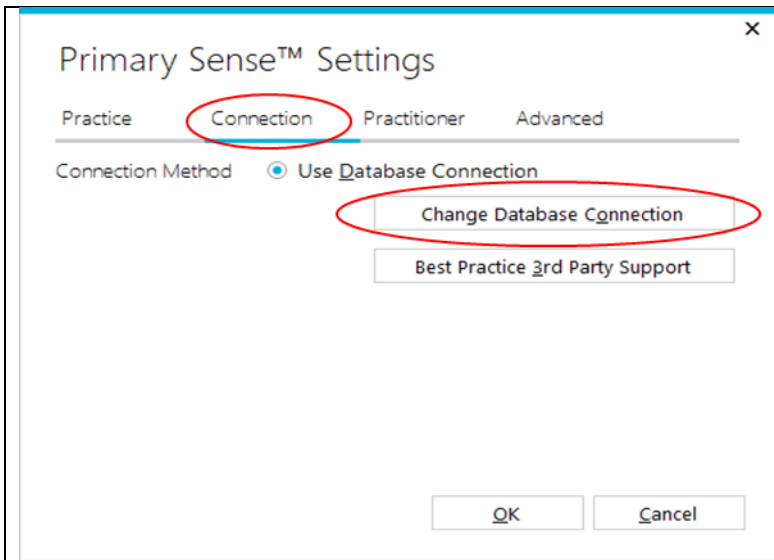


Select the **Practice** tab and enter the practice credentials – these are located in the 'Welcome to Primary Sense' email you received. From the email:

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

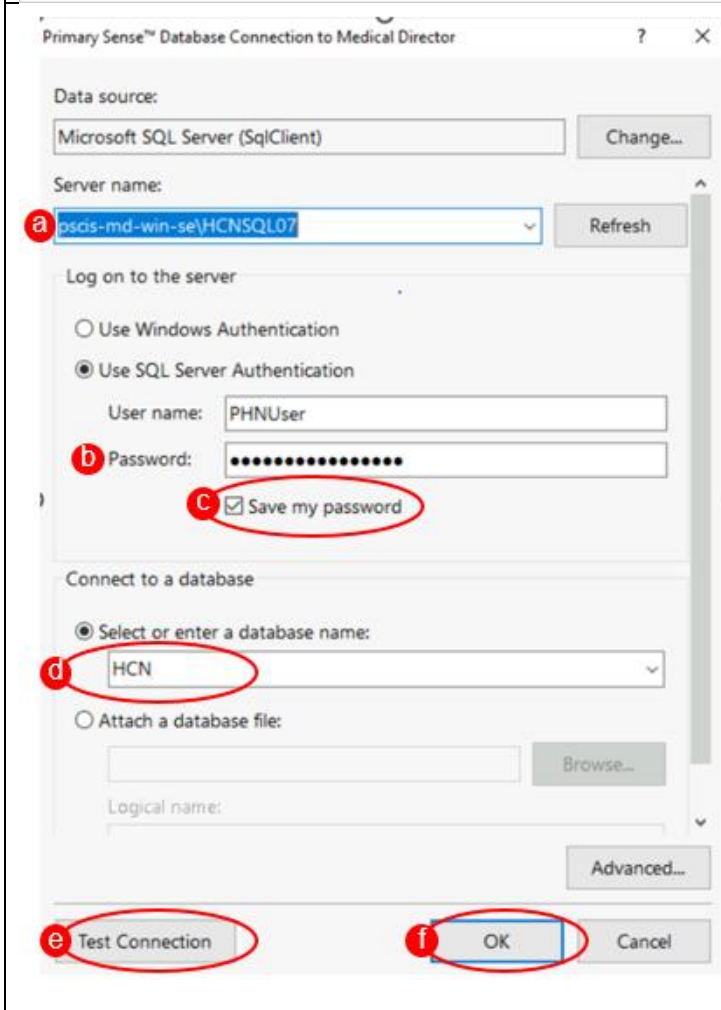
It will take a moment to identify the practice details.

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



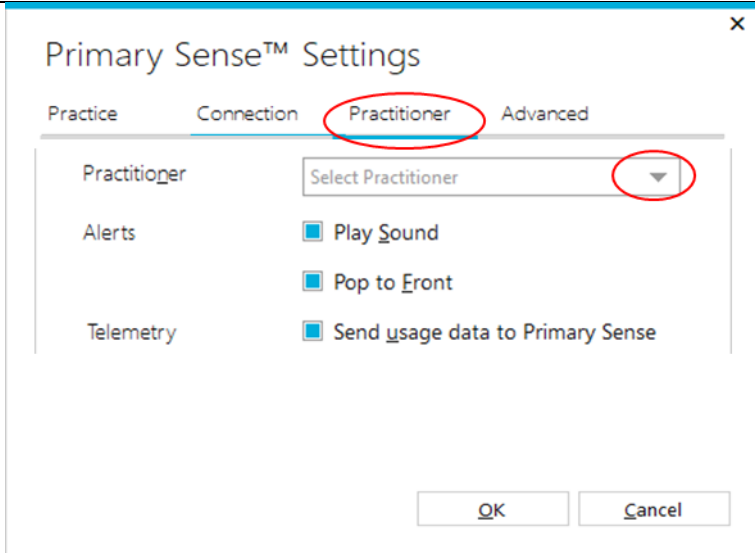
In the **Change Database Connection** popup:

- a. Check the Server name and change if not correct: **<server name>\HCNSQL07**
- b. Add the password that was created when you ran the SQL Script (STEP 1)
- c. Tick ‘**save my password**’
- d. Ensure the database name is **HCN**
- e. Click ‘**Test Connection**’
- f. 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 read only user account created for the PHNUser Account.

Click the OK button to save the settings, otherwise click Cancel to exit the Settings window.

Practitioner Settings



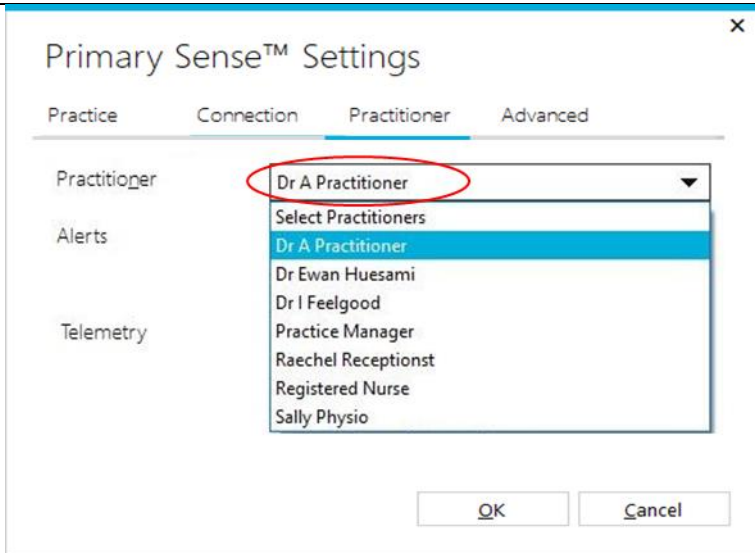
Make sure Medical Director is open and running.

Navigate to the **Practitioner** tab in Primary Sense, then select the name of the practitioner from the drop down list.

It may take a moment to display all practitioners.

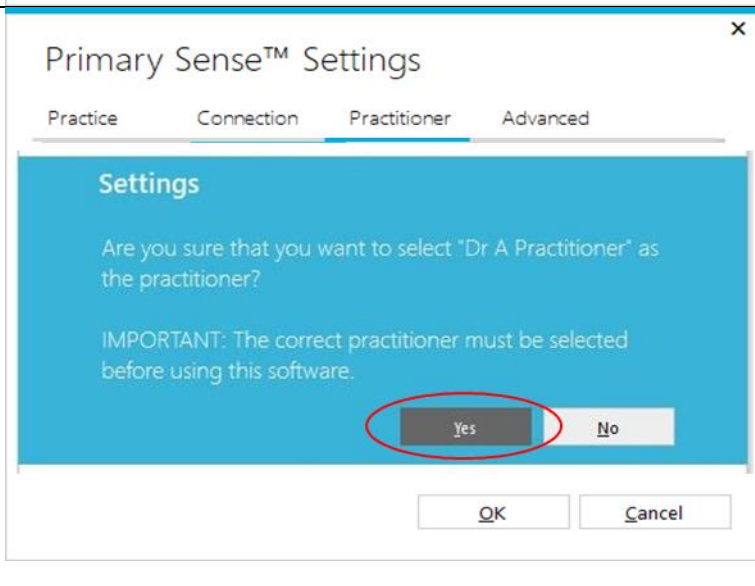
If practitioners are not displayed in the list, check your database connection, and try again.

Once setup, you do not need to change/select a practitioner if the PC already has Medical Director installed, as the Desktop will detect the currently logged in user.



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 same, you will be asked to confirm your choice.

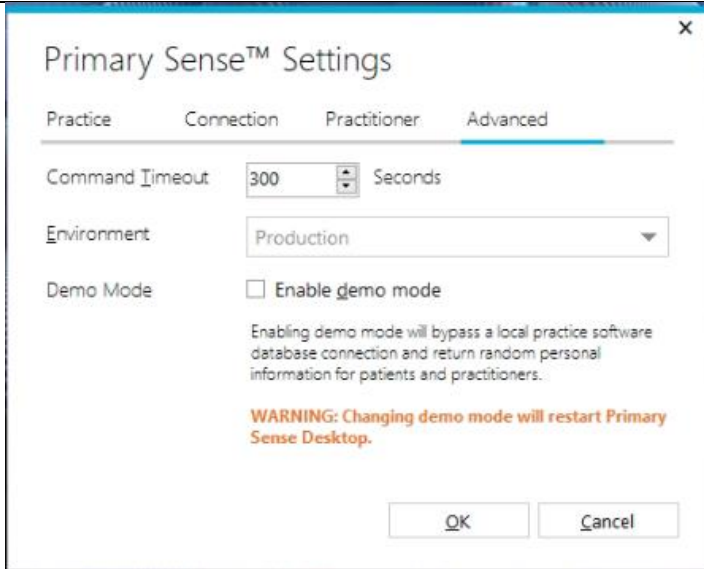
Click **Yes** to confirm or **No** to re-select a different practitioner.

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 when presented
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



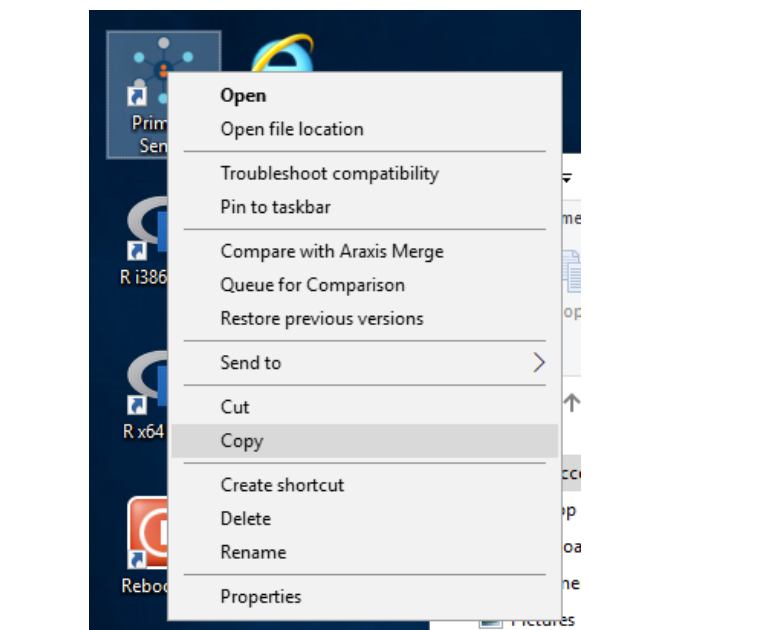
The Command Timeout and Environment settings should only be changed if directed to by Primary Sense support staff. These are set to the following defaults

Command Timeout **300 Seconds**
 Environment **Production**

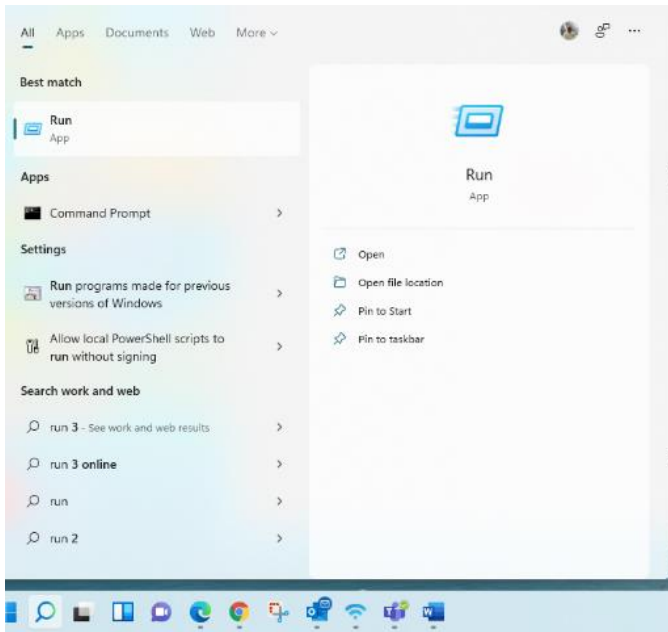
Click the *OK* button to save your settings, otherwise click *Cancel* to exit the *Settings* window

Starting Automatically

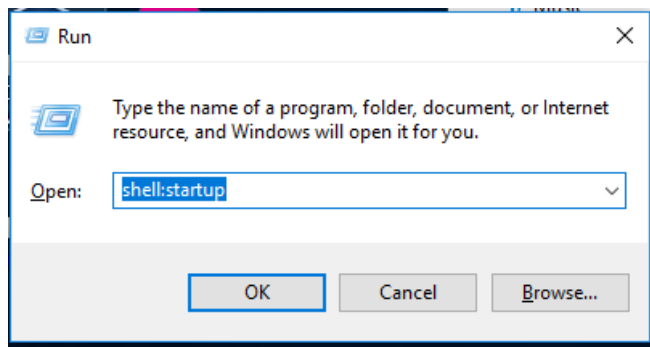
To ensure that Primary Sense Desktop starts every time that you logon, you will need to add a shortcut to it in your startup folder. First locate the Primary Sense Icon on your desktop



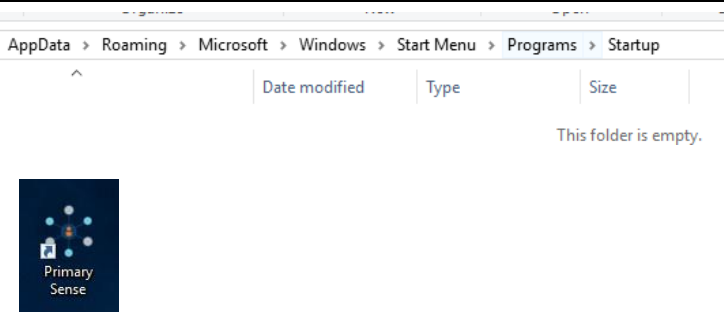
Now right click on the icon and click *Copy*



Click on the Start Button, in the search box type in "Run" and press the Enter key



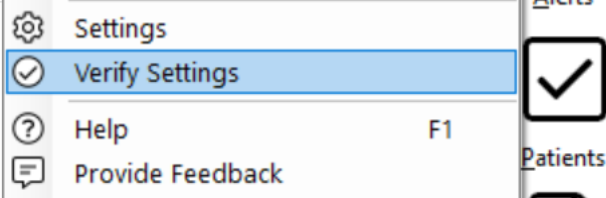
In the Run box type "shell:startup" and press the enter key




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

Completed

Time	Category	Message
10:49 AM	Info	Verification started
10:49 AM	Info	Verifying version
10:49 AM	Success	Latest version is installed
10:49 AM	Info	Verifying practice software SQL connection
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.

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 be applied automatically.

Troubleshooting

[Troubleshooting guide](#) – detailed troubleshooting steps and screenshots are available in the troubleshooting guide.

Quick troubleshooting steps:

- If the database connection fails, 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.