

Primary Sense Extractor 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	<p>END of LIFE</p> <p>The following operating systems are no longer supported by Microsoft or Best Practice</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	
<p>Notes: Services are 64 bit (x64) and require a 64-bit operating system</p>	

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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).

- Installation and use of this software can only proceed when the practice and PHN have a data sharing agreement. This step has been passed if you receive the Client Secret and Client ID.
- The client information is required to configure Primary Sense. Please contact your PHN if you do not have this for your practice.
- An internet connection is required to send data to Primary Sense.
- A connection to the installed practice software database is required. Please check the version of the Best Practice Data Update being run at the practice and follow the appropriate steps.
- Install the Primary Sense Services Setup (Extractor).
- Full installation will take up approximately 60 megabytes of disk space.
- Installation requires OLE DB driver is installed – **prior to install we recommend checking the file existence: C:\Windows\System32\msoledbsql.dll. If this does not exist, please install the OLE DB driver from the link (note we recommend installing v19.2.0 which does not require Visual Studio 2022 toolset upgrade): install version 19.2.0 <https://learn.microsoft.com/en-us/sql/connect/oledb/release-notes-for-oledb-driver-for-sql-server?view=sql-server-ver16#1920>**

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
<u>*.primarysense.org.au</u>

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

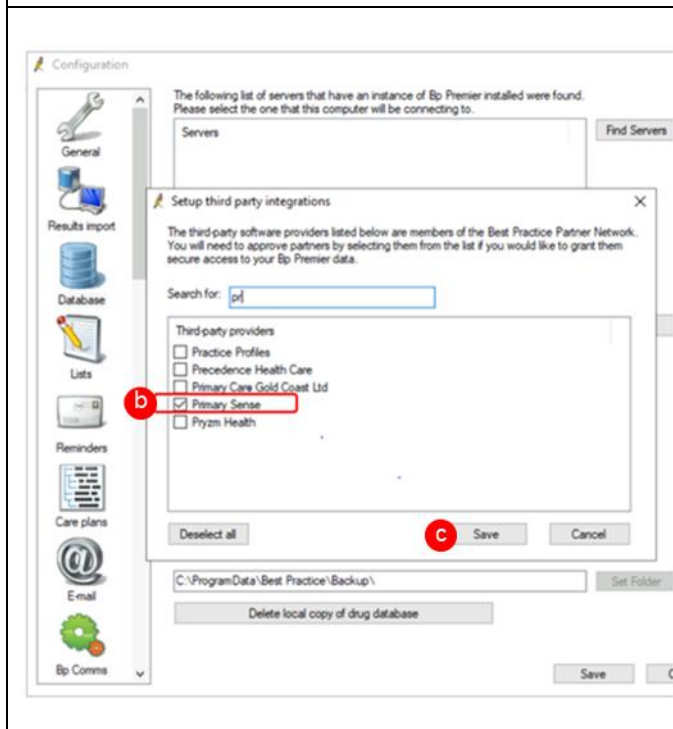
You must allow the Primary Sense software for all users “read and write” access to the following folder and its subfolder in your antivirus. This applies to all users who will use Primary Sense software

Folder
<u>C:\programdata\primary sense\</u>

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

1. Configure Third Party Integration in Best Practice

To install Primary Sense for Best Practice you will need to configure third party integration to allow Primary Sense to access the database in Best Practice software.



To do this:

- a. Navigate to Best Practice, then:
Setup > Configuration > Database > Setup third-party integrations
- b. Scroll down to the list of third party providers and tick **Primary Sense**
- c. Click **save**, then save again

2. Check Authentication Details

During installation and configuration, you will be asked for the Practice credentials (Practice ID and a “Secret”). Ensure that these are available to enter into the Primary Sense settings during configuration

You are now ready to configure the database setting and set up the first user on this device. You will need the Authentication Details and the database connection for Best Practice

3. Download Primary Sense Software – for Best Practice

Download the Primary Sense Service setup (Extractor) using the link in the ‘Welcome to Primary Sense’ email you received. Please contact your PHN if you haven’t received this email, as you cannot proceed without it.


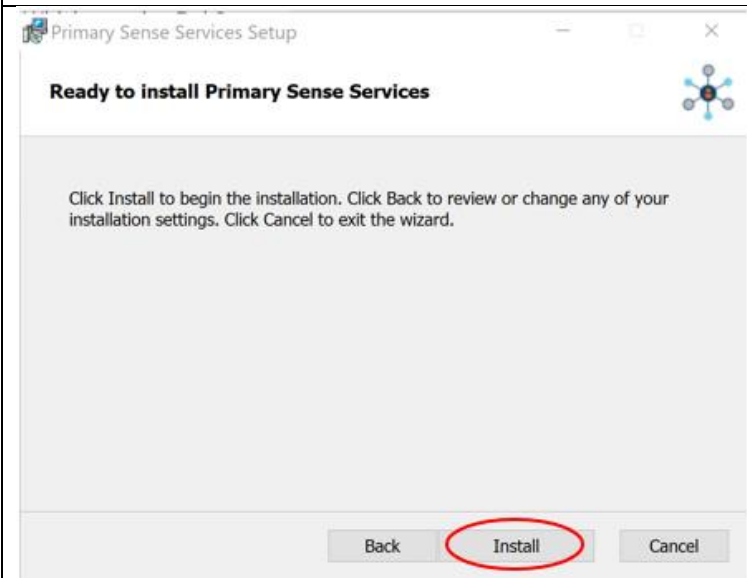
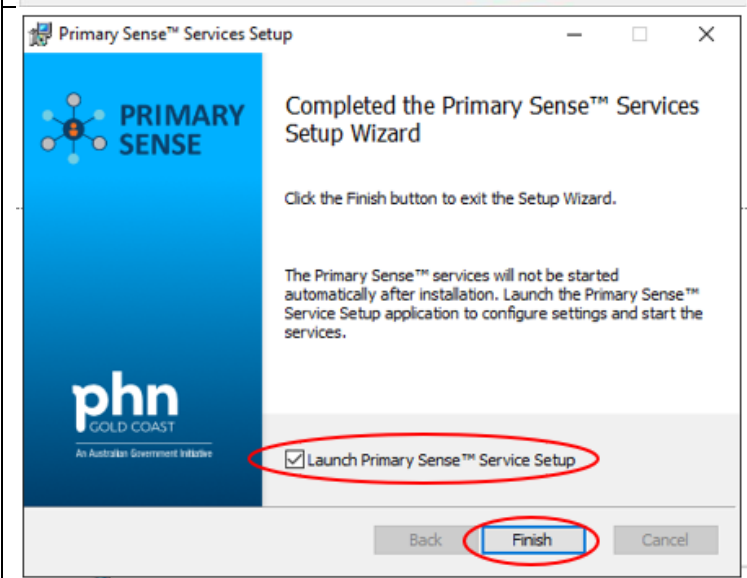
You will need to be logged in to Microsoft Windows with a **privileged user account** with sufficient authorisation to install applications, such as an administrator, prior to attempting installation.

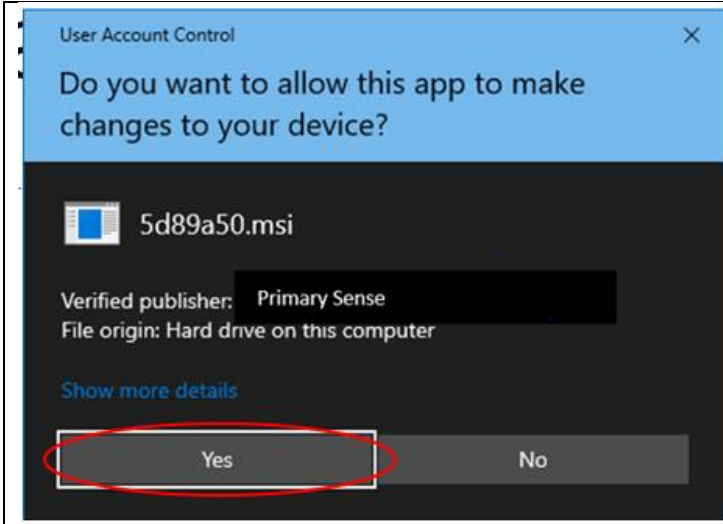
You are now ready to proceed to Install Primary Sense Extractor

4. Primary Sense Extractor Installation – Best Practice

Make sure you read all the instructions above 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 the PHN.

The screenshots below will help you through the install process:

 <p>The screenshot shows the 'Welcome to the Primary Sense Services Setup Wizard' window. It features the Primary Sense logo and the PHN Gold Coast logo. The text reads: 'Welcome to the Primary Sense Services Setup Wizard. The Setup Wizard will install Primary Sense Services January 2022 (v2.1.0) on your computer. Click Next to continue or Cancel to exit the Setup Wizard.' At the bottom, there are three buttons: 'Back', 'Next', and 'Cancel'. The 'Next' button is circled in red.</p>	<ul style="list-style-type: none">a. Run the Primary Sense Services setup (Extractor) installer once it has completed downloading.b. Click Next to continue
 <p>The screenshot shows the 'Ready to install Primary Sense Services' window. It features the Primary Sense logo. The text reads: 'Ready to install Primary Sense Services. Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard.' At the bottom, there are three buttons: 'Back', 'Install', and 'Cancel'. The 'Install' button is circled in red.</p>	<ul style="list-style-type: none">c. click install
 <p>The screenshot shows the 'Completed the Primary Sense™ Services Setup Wizard' window. It features the Primary Sense logo and the PHN Gold Coast logo. The text reads: 'Completed the Primary Sense™ Services Setup Wizard. Click the Finish button to exit the Setup Wizard. The Primary Sense™ services will not be started automatically after installation. Launch the Primary Sense™ Service Setup application to configure settings and start the services.' At the bottom, there is a checkbox labeled 'Launch Primary Sense™ Service Setup' which is checked and circled in red. Below the checkbox are three buttons: 'Back', 'Finish', and 'Cancel'. The 'Finish' button is circled in red.</p>	<ul style="list-style-type: none">d. Make sure Launch Primary Sense is tickede. Click finish to close the installer <p><i>NB: We recommend running a Windows Update after installation to ensure Windows and the Microsoft .Net Framework are up to date.</i></p> <p>the</p>



You may also be asked to authorise the [installation using Windows User Account Control](#).

Check that the publisher is 'Primary Sense.'

Click **Yes** to authorise and continue

Note: The UAC dialog on your computer may look different depending on your version of Windows, or you may be asked to enter an administrator username and password.

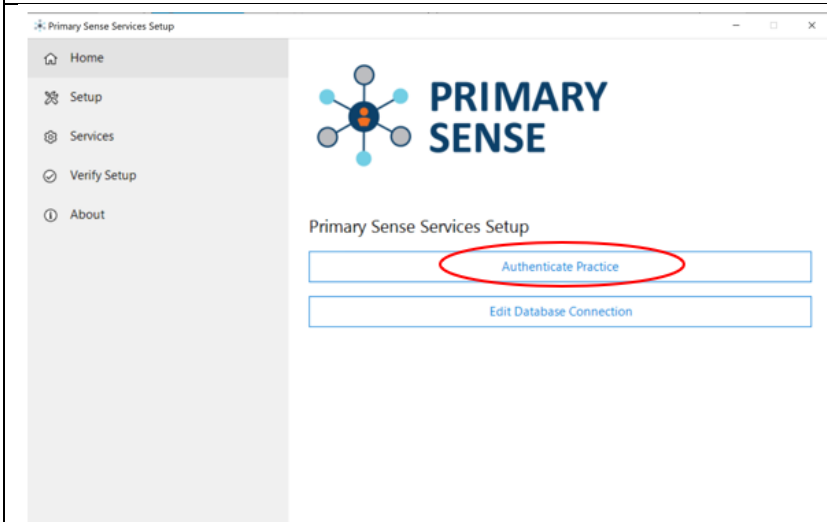
5. Primary Sense Extractor Configuration – Best Practice

NB: The Primary Sense Services Setup application will run as soon as the installation completes.

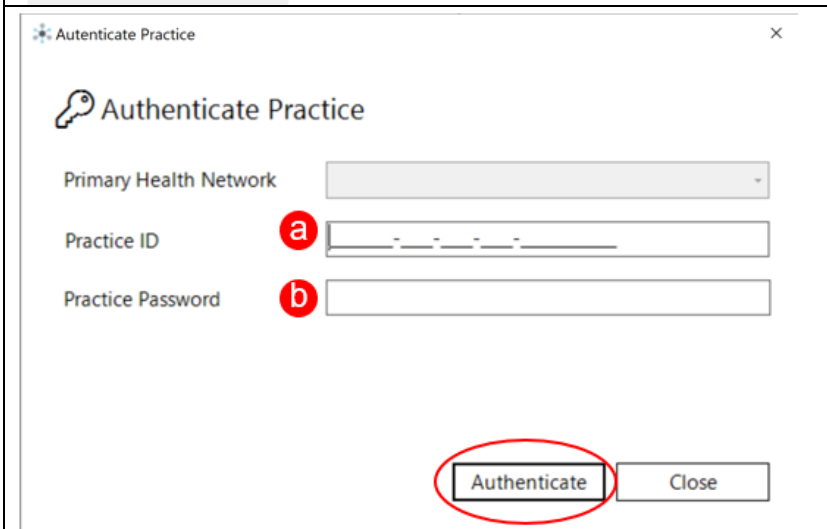
If it does not run, or to access it in the future, it can be selected from the Windows Start Menu.

If it is not visible in the start menu, start typing "primary" and the Primary Sense Services Setup application should appear in the start menu search list.

Starting the Application after install



Click on the **Authenticate Practice** button



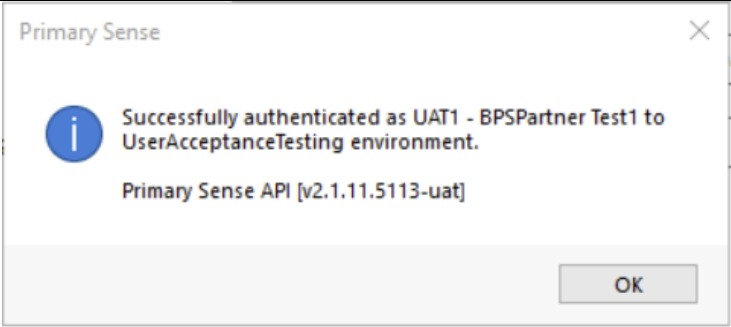
Locate the 'Welcome to Primary Sense' email you received. From the email:

- a. Copy and paste the practice ID (client ID)
- b. Copy and paste the Secret Code (practice password)

e.g. see example below.

- c. Click **Authenticate**

Practice Name	a Client Id	b Secret
Test Practice 1	f2806044-d6b9-4f71-8d8c-e1bec3159d4d	E6f8Q~lypu9SGmsYqJINbjQ4d1UQo1fv.K.saa6_



Primary Sense

Successfully authenticated as UAT1 - BPSPartner Test1 to UserAcceptanceTesting environment.

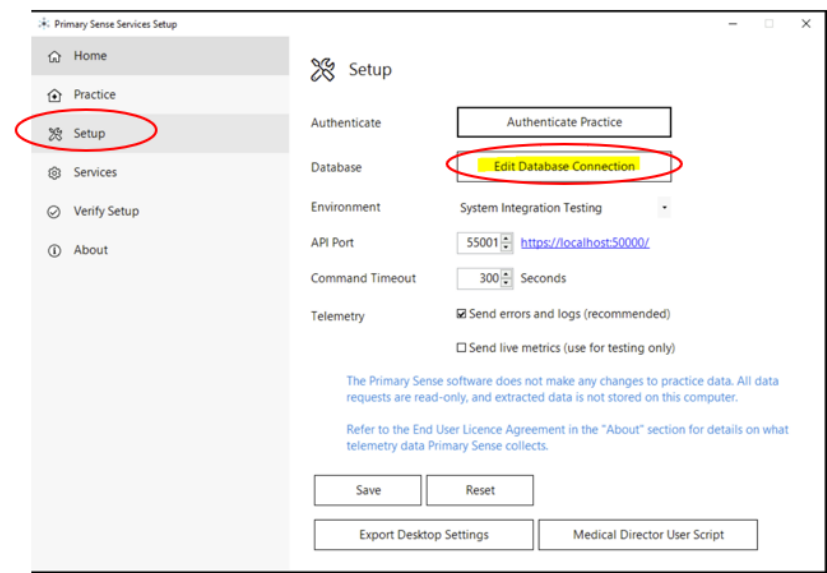
Primary Sense API [v2.1.11.5113-uat]

OK

You should receive a popup notifying you of successful authentication:

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.

6. Configuring database connection



Primary Sense Services Setup

- Home
- Practice
- Setup**
- Services
- Verify Setup
- About

Setup

Authenticate:

Database:

Environment: System Integration Testing

API Port: 55001 <https://localhost:5000/>

Command Timeout: 300 Seconds

Telemetry: Send errors and logs (recommended)
 Send live metrics (use for testing only)

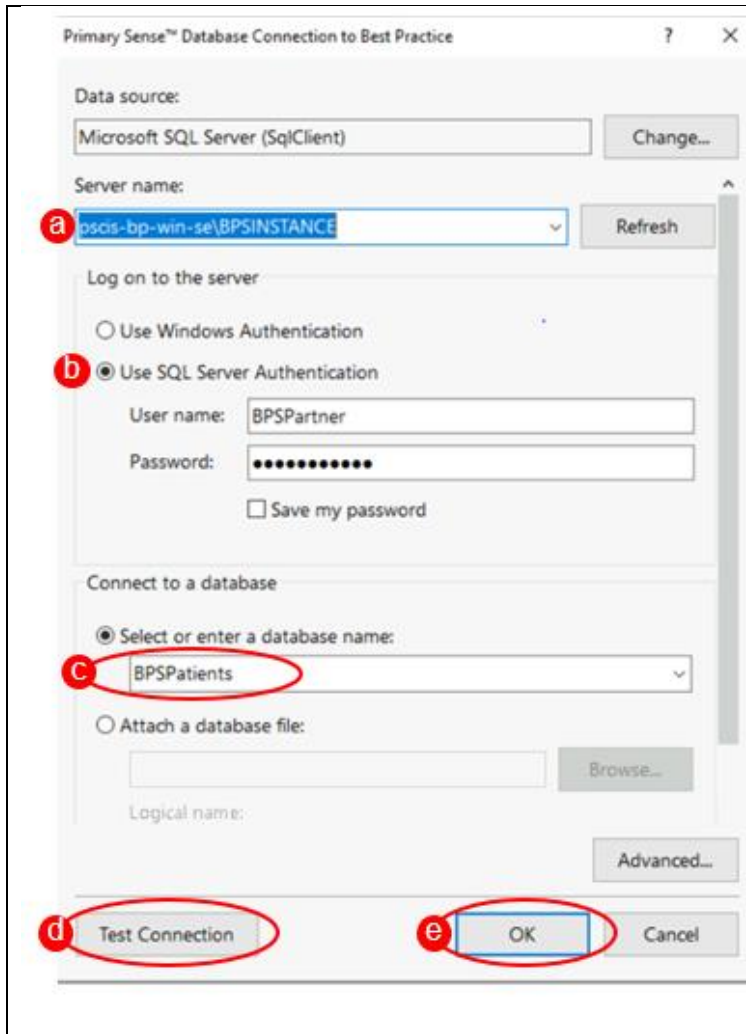
The Primary Sense software does not make any changes to practice data. All data requests are read-only, and extracted data is not stored on this computer.

Refer to the End User Licence Agreement in the "About" section for details on what telemetry data Primary Sense collects.

a. Navigate to the Setup tab

b. Continue setting up the Practice Software Database Connection by clicking the **'Edit Database Connection' button**

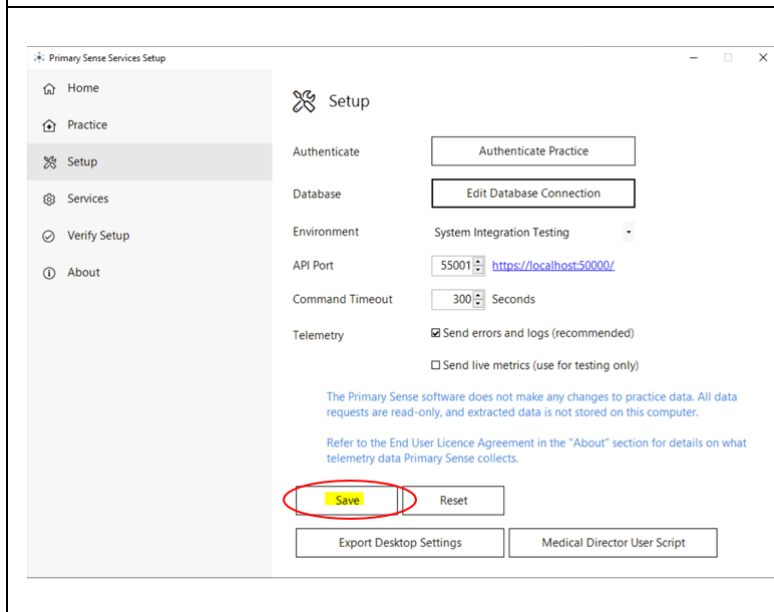
NB: Have you setup the database connection? Return to Prerequisite no-3 if you have not configured Best Practice Third Party Integration for Primary Sense. Primary Sense will not work if this step has been missed.



In the Database Connection popup:

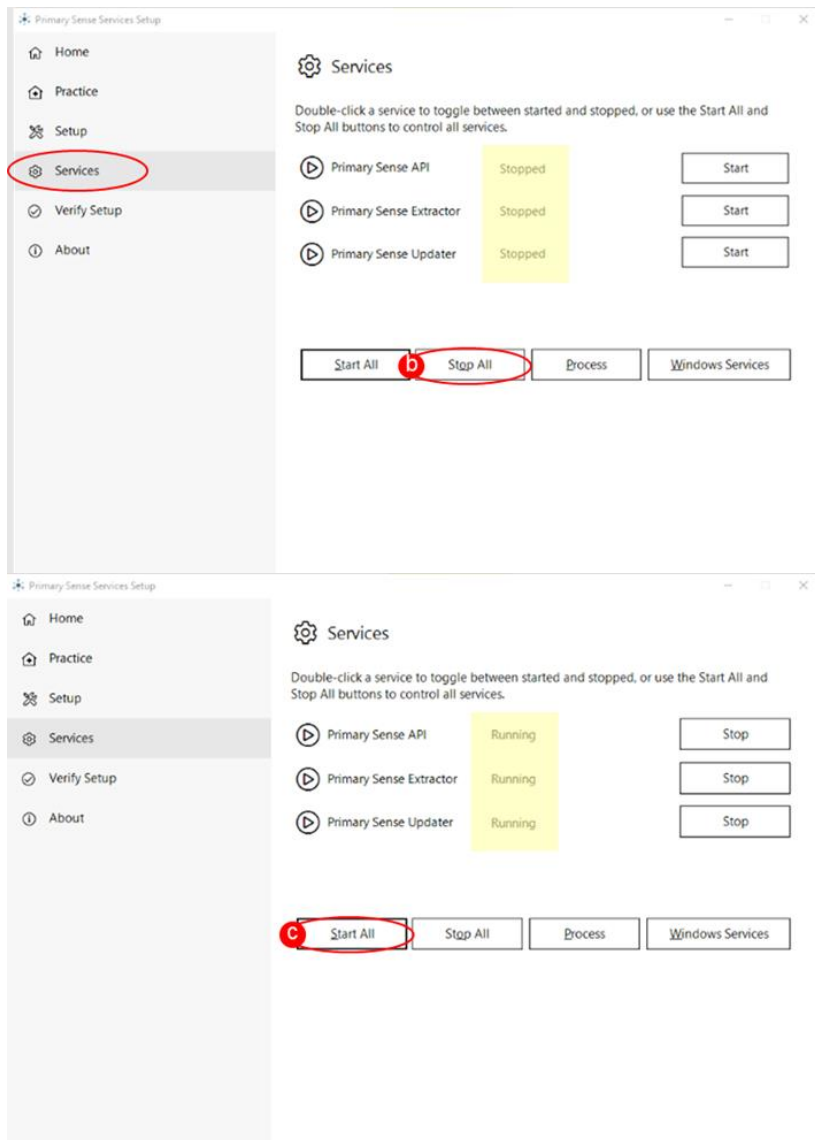
- a. Check the Server name and change if not correct: **<server name>\BPSINSTANCE**
- b. Ensure **SQL Server Authentication** is selected, and the BPSPartner details have populated
- c. Ensure the database name is **BPSPatients**
- d. Click 'Test Connection'
- e. If succeeded, click 'OK'

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



You will be returned to the setup screen – click **SAVE** to save the settings.

7. Start Services



- Go to the Primary Sense setup program and click **Services**
- Click **'Stop All'** and verify all services get stopped
- Then click **'Start All'** and verify all services start (will display as 'running')

NB: There may be a delay of up to 10 seconds while a service starts or stops

The following statuses are displayed for each service:

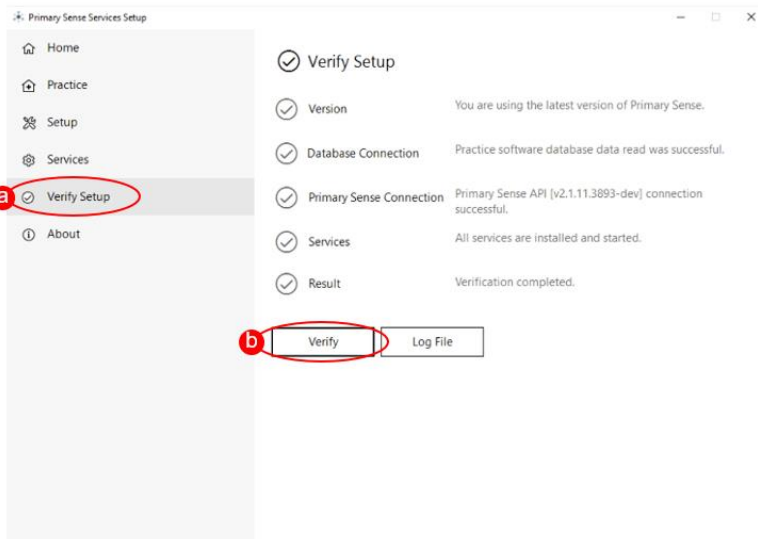
Icon	Status	Description
	Stopped	The service is stopped. Double-click the service to start it
	Running	The service is running. Double-click the service to stop it.
	Error	The service is disabled, the status could not be determined, or it is not installed

Note that the Extractor service depends on the API service, therefore starting this service will also start the API service. There may be a delay of up to 10 seconds while a service starts or stops.

Use the following additional commands to control the services:

Icon	Command	Description
	Start All	Start all Primary Sense services.
	Stop All	Stop all Primary Sense services.
	Windows Services	Open the Microsoft Windows Services console. Use this option to further configure the services.

8. Verify Setup



In the Primary Sense Setup program

- Click on the **Verify Setup** tab
- Click on the **'Verify'** button

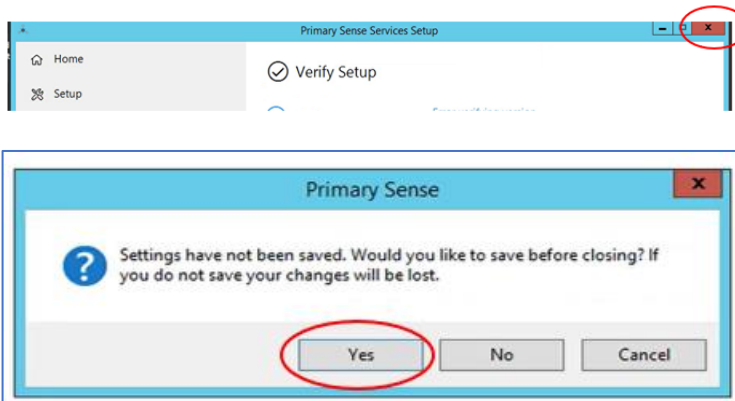
NB: the following tests will be performed, confirming;

- If the latest version of Primary Sense Services is installed,
- Connection to the practice software database is successful,
- Connection to Primary Sense servers is successful; and
- All Primary Sense Services are running,

Results of the verification tests will be displayed. If required, to view an error log entry, click the **'Log File'** button to open the daily log file in the default text editor.

If errors are present, consult the [troubleshooting guide](#) for further assistance.

9. Close



- Click on the x in the top to close the setup wizard
- Make sure you select **yes** to **save** if asked

10. Further Information:

The items below will assist you in your understanding of Primary Sense

<i>Applications / Installed software</i>	
The following application is installed. A shortcut to the application is created in the start menu.	
Name	Description
Primary Sense	Services Setup
Application to configure settings for the Primary Sense Services. Administrative privileges are required to run the application.	

<i>Windows Event Logs</i>			
The following Windows Event Logs are configured. Note that the logs are not removed from the system when the software is uninstalled. Logs may be manually deleted using the Windows Event Viewer.			
Event Log	Event Source		Description
Primary Sense	Primary Sense	API	Events generated by the Primary Sense API service.
Primary Sense	Primary Sense	Extractor	Events generated by the Primary Sense Extractor service.
Primary Sense	Primary Sense Setup	Services	Events generated by the Primary Sense Service Setup application.

<i>Data Folders</i>	
The data folders are created inside the following parent folder. These folders and files are not removed from the system when the software is uninstalled.	
Parent Folder C:\ProgramData\Primary Sense\	
Child Folder	Description
Logs	Contains daily log files. Files are deleted after 30 days. File names are in the format: [USER]_[SOFTWARE]_[DATE].txt For example: SYSTEM_Primary_Sense_Extractor_20210101.txt
Settings	Contains settings files. Use the Primary Sense Service Setup application to change settings

<i>Troubleshooting</i>
Troubleshooting guide – detailed troubleshooting steps and screenshots are available in the troubleshooting guide.
Quick troubleshooting steps: <ul style="list-style-type: none"> • After you have completed set up, ensure that you Start the Services. • 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 Services are using excessive database resources or otherwise causing an issue, please stop and disable all Windows Services and contact the PHN

<i>Recommendations</i>
Primary Sense recommends the following: <ul style="list-style-type: none"> • 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.