



**PEN SETUP INSTALLATION AND  
PRIMARYCARE SIDEBAR™  
USER GUIDE**



**1993 - 2009**

**PEN COMPUTER SYSTEMS PTY LTD**

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## Document History

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# 1 Introduction

## 1.1 PrimaryCare Sidebar™

Pen Computer Systems (PCS) has developed the PrimaryCare Sidebar™ as an adjunct to the GP Clinical Desktop System to deliver useful tools and decision support information for general practice at the point of care. It is designed to give the user easy access to a range of health care applications.

Once the Pen Setup Installation is completed you will see the PrimaryCare Sidebar™ sitting on the right of the screen (by default). It contains a series of panels, each with links to a range of primary care software tools. The panels allow the tools to be grouped into logical areas of health care.

## 1.2 Pen Setup Installation

The Pen Software Setup Installation is designed to allow installation of the PrimaryCare Sidebar™ and selected primary care software tools simultaneously.

## 1.3 Purpose of this document

The purpose of this document is to provide instructions on how to install and use the functionality provided by the PrimaryCare Sidebar™ software.

## 1.4 Notes about this User Guide

This User Guide describes the use of the PrimaryCare Sidebar™ software with reference to the following clinical desktop systems:

- HCN Medical Director
- Best Practice
- Genie

Wherever Medical Director is used in this document we are referring to the Health Communications Network – Medical Director™ Clinical Desktop System.

### NOTE:

Compatibility of the individual primary care software tools that reside on the PrimaryCare Sidebar™ with the various clinical desktop systems will be specified in the user guides that accompany those tools.

## 1.5 VISTA Users

Microsoft Vista users will find that they also have a Vista sidebar which can be configured in a variety of ways.

The PrimaryCare Sidebar™ exists separately to the Vista sidebar to ensure that the primary care suite of tools are kept together in an ordered way and can easily be supported by HealthConnect SA and PCS support staff.

This user guide provides configuration options for the two sidebars so they can work in conjunction with each other.

## 1.6 Terminology

Term	Definition
CAT	Clinical Audit Tool
HCN	Health Communications Network
MD	Medical Director
PCS	Pen Computer Systems Pty Ltd
PrimaryCare Sidebar™	The PCS sidebar application that links to a range of primary care software tools

## 2 System Requirements

The minimum and recommended system requirements to run the PrimaryCare Sidebar™ are provided in this section.

Further requirements, which may be required by individual primary care software tools that reside on the PrimaryCare Sidebar™ will be specified in the user guides that accompany those tools.

### 2.1 Operating System

The PrimaryCare Sidebar™ is compatible with the following environments:

- Microsoft Vista
- Microsoft Windows XP Professional
- Microsoft Windows 2003 Server
- Microsoft Windows 2003 R2 Server

### 2.2 Microsoft .NET Framework

The PrimaryCare Sidebar™ requires a minimum of the Microsoft .NET Framework version 2.0 to be installed. However, as many of the tools require a higher version it is recommended the Microsoft .NET Framework version 3.0 be installed.

This will be installed at the same time as the PrimaryCare Sidebar™. Refer to the following section on Installation.

#### How to check which version of .NET you have installed:

Method 1:

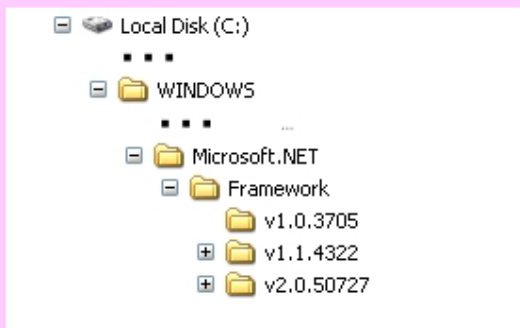
Go to Start > Control Panel

Open 'Add or Remove Programs'

Check to see that 'Microsoft .NET Framework 3.0' appears in the list

Method 2:

Using windows explorer



Locate the

%systemroot%\Microsoft.NET\Framework folder

[The %systemroot% is found under your c:\ drive and will usually be named 'WINDOWS' or 'WINNT']

The versions that are installed will be listed by folder.

## *2.3 Internet Explorer*

To install the PrimaryCare Sidebar™ you must use Internet Explorer version 7.0 or later.

## *2.4 Internet Connection*

You will need an internet connection to download the software initially and then to receive upgrades. It is recommended that you have a broadband internet connection.

## 3 Pen Setup Installation



**Installation of the PrimaryCare Sidebar™ and any prerequisites must be done by a user with Administration privileges.**

**After the installation is completed any user can log on to the PC and access the PrimaryCare Sidebar™.**

The PrimaryCare Sidebar™ is part of the Pen Setup installation. It is installed using Microsoft ClickOnce technology.

Using **Internet Explorer**, go to the installation URL provided to you by PCS. Contact the PCS Help Desk on 1800 762 993 if you have not been provided with these details.

**Note: ClickOnce technology is not compatible with FireFox.**

**Once installed VISTA users must reboot their PC**, otherwise if the sidebar is closed it cannot be reopened.

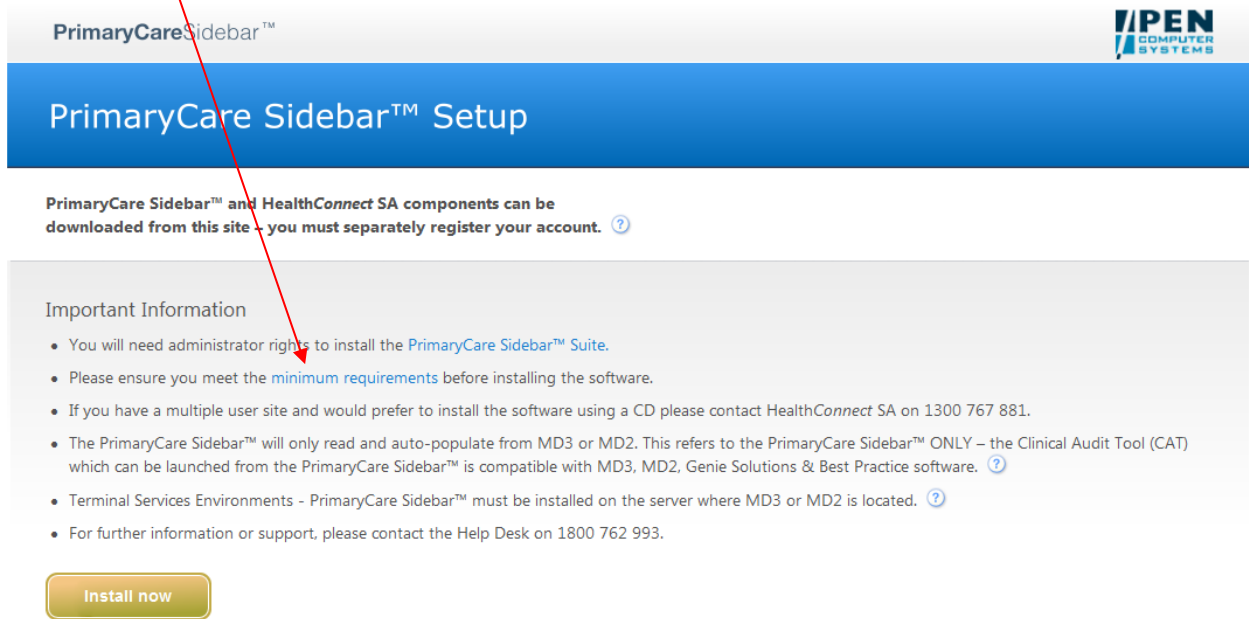
### 3.1 Prerequisites

If software prerequisites are required they will be listed on the installation page displayed. If they are not already installed on your computer they will be installed automatically prior to the launch of the Pen Setup installation.

### 3.2 Pen Setup

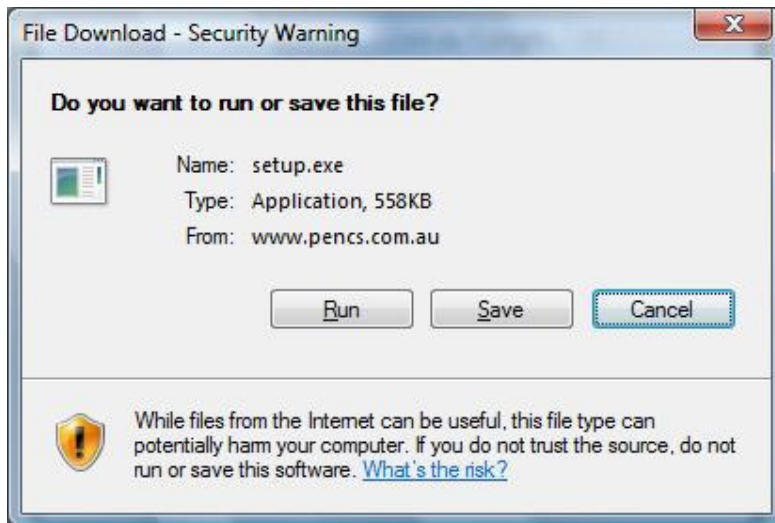
- Go to the installation URL

#### Minimum Requirements



- Click the 'Install Now' button.

Follow the following prompts.



- Click 'Run'

If the prerequisites are not installed you will be prompted to install them now. Otherwise, the 'Software Setup' screen will be displayed.



- Click 'Next'

The next section will guide you through the software components selection and installation process.

### 3.3 PrimaryCare Sidebar™ and other software tools

#### Installing the PrimaryCare Sidebar™

All the primary care software tools require the Primary Care Sidebar, Sidebar Login and Primary Care Sidebar Plugin components to be installed. These will be preselected and cannot be changed.

#### Installing other primary care software tools concurrently

Other tools may also be selected but the use of these is not covered in this User Guide.



If you are following the Installation Guide for one of the other software tools in conjunction with this guide, make sure the components you want to install are now selected as indicated by that guide.

All the applications selected are installed progressively in the same installation.

Pre-requisites are pre-selected



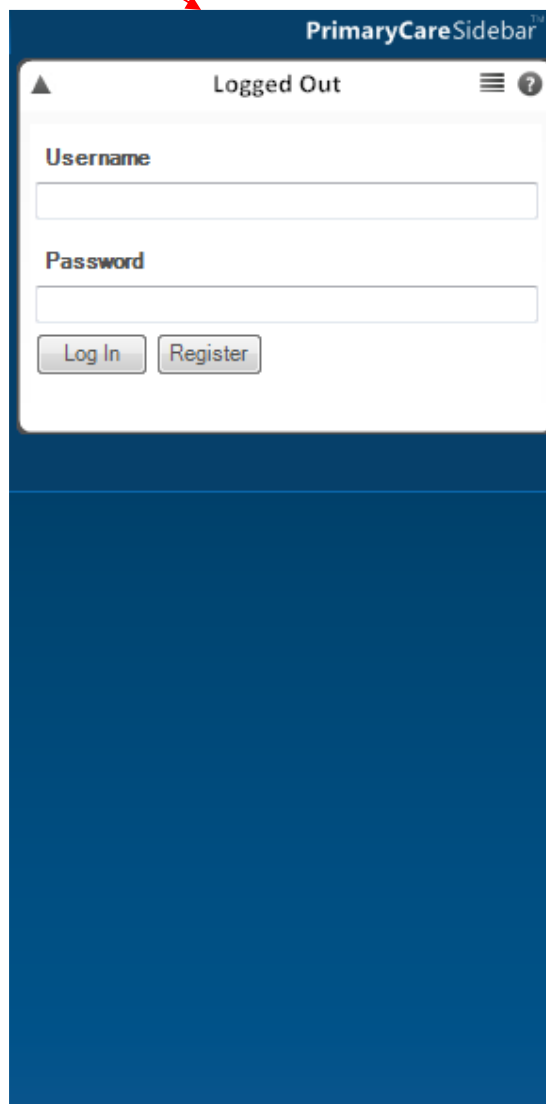
- Click 'Install'

Once the installation has completed the PrimaryCare Sidebar™ should be available on the right of the screen. This is the default position. If you are unable to see the PrimaryCare Sidebar™, you can launch it from the newly created icon on your desktop, or Start > Programs > Pen Computer Systems > Start Primary Care Sidebar.

The login panel will be displayed. You will need to register to obtain a username and password. This is explained further in this manual.

The other tools selected for installation will not be displayed at this stage. Once you have logged into the sidebar the other tools will be present on the appropriate application panels.

PrimaryCare Sidebar™



**VISTA users must reboot their PC**

### 3.4 User Installation

Once the Administrator has completed the installation a User without administration privileges can log into their computer and they will see the 'Start Primary Care Sidebar' shortcut on their Desktop.



The User should:

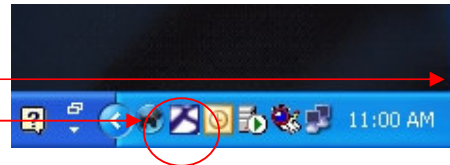
- Double-click the shortcut
  - The software installation process will start for the purpose of configuring the PrimaryCare Sidebar™ under this User's profile
  - The PrimaryCare Sidebar™ will be started
  - The login panel will be displayed
- Register for a username and password - this is explained further on in this manual.

## 4 PrimaryCare Sidebar™ Configuration

This section of the User Guide covers configuration of the PrimaryCare Sidebar™. Please note that Vista users should also refer to the next section which covers the configuration options for the two sidebars so they can work in conjunction with each other.

### 4.1 Opening the Sidebar

Once installed the Sidebar can be opened via a thin grey (or blue) bar at the right hand side of your screen or the Desktop Sidebar icon



The Sidebar is opened by

- moving your mouse over the thin bar, which will cause the Sidebar to slide in
- moving your mouse off the Sidebar will cause it to slide out again
- or clicking the Desktop Sidebar icon, which will cause the Sidebar to display
- clicking the icon again will cause it to disappear

### 4.2 Configuring the Sidebar opening behaviour

To configure your preference for the Sidebar opening behaviour:

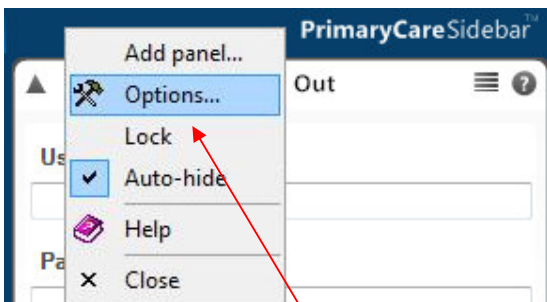
- Click the Desktop Sidebar icon
- The Sidebar will display
- Right click the PrimaryCare Sidebar™ header

Either

- Select 'Auto-hide' / 'Hide' from the drop down menu

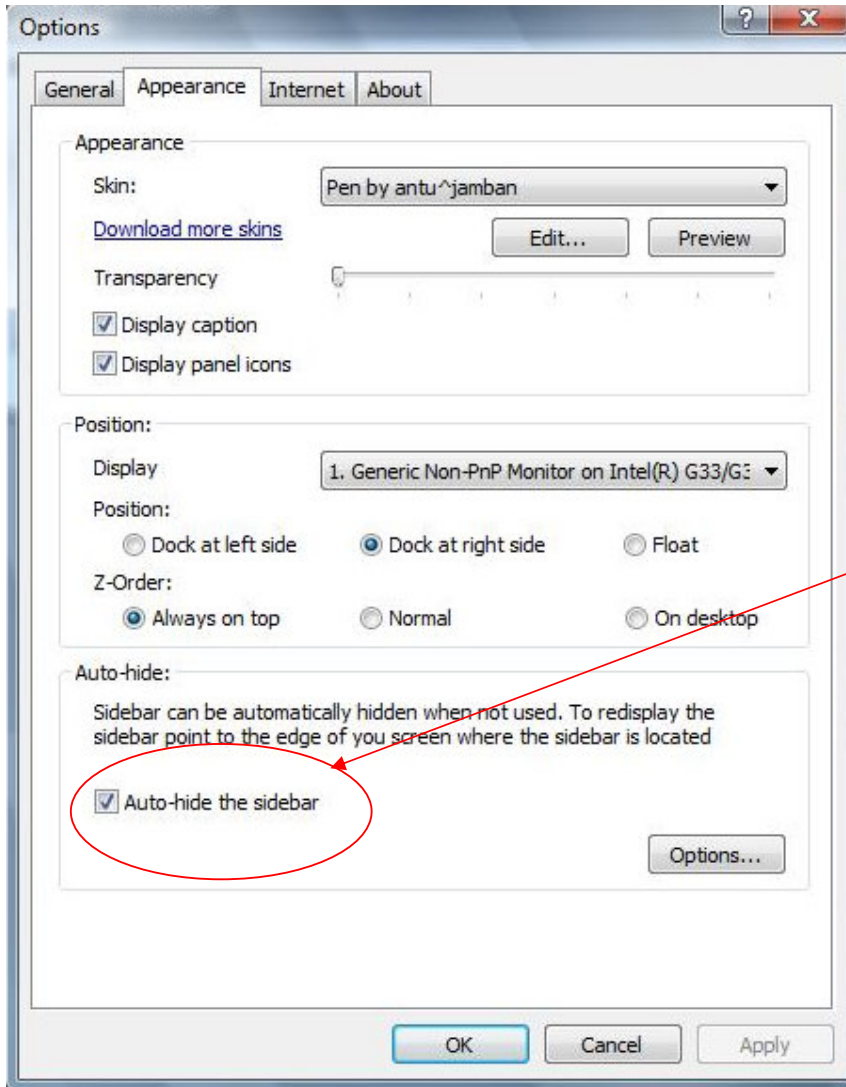
Or

- Select 'Options' from the drop down menu which provides further selections



Select 'Options' from the drop-down menu

- The 'Options' Dialogue box will appear
- Click on the 'Appearance' tab
- In the 'Auto-hide' pane choose to tick on or off the 'Auto-hide the Sidebar' option




- Auto-hide ticked will give you access via the thin bar (note the Desktop Sidebar icon will still be available)
- Auto-hide unselected will give you access only via the Desktop Sidebar icon



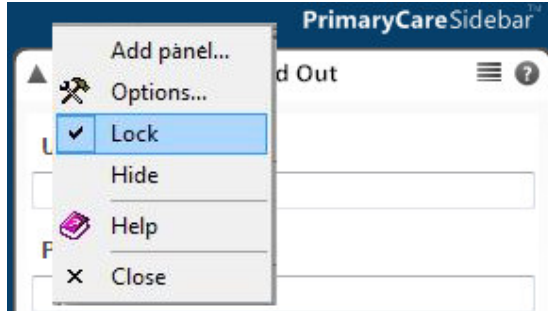
Note that clicking the Desktop Sidebar icon at any time will override your preference and revert to the default which is unselected.

### 4.3 Resizing the PrimaryCare Sidebar™

- Right click the PrimaryCare Sidebar™ header
- Choose Options. From the Appearance tab ensure the Lock option is not selected
- Hover the mouse over the left-hand side of the sidebar until the  icon is visible then left click and hold to drag the sidebar to the width you require

### 4.4 Locking the Sidebar

You can choose to have the Sidebar open permanently. This is a good option if you have a wide screen.



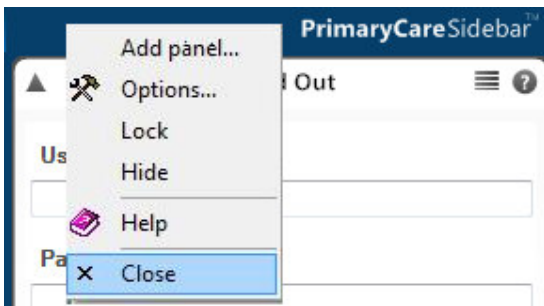
- To lock the Sidebar
- Click on the Sidebar icon
  - Tick on the 'Lock' option

*Make sure you have the 'Auto-hide' option unselected.*

### 4.5 Closing and restarting the PrimaryCare Sidebar™

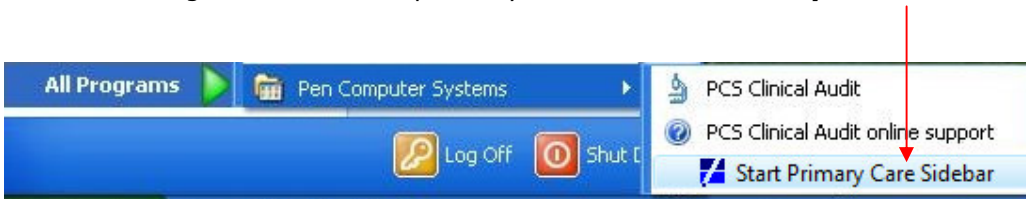
The Sidebar will automatically be started when you log into Windows.

The Sidebar can be closed if required by clicking the Sidebar icon and selecting 'Close' from the drop-down menu.



To restart the Sidebar choose:

Start > All Programs > Pen Computer Systems > **Start Primary Care Sidebar**



## 5 Configuration for VISTA Users

The PrimaryCare Sidebar™ exists separately to the Vista sidebar to ensure that the primary care suite of tools are kept together in an ordered way and can easily be supported by HealthConnect SA and PCS support staff.



When the PrimaryCare Sidebar™ is installed it may not be in a configuration with the Vista sidebar that suits you.

The example here shows the default install for one user's setup.

PrimaryCare Sidebar™  
Vista sidebar

It is recommended to have the PrimaryCare Sidebar™ on the far right so it is out of the way when not needed.

Positioning the PrimaryCare Sidebar™ to the far right of the screen

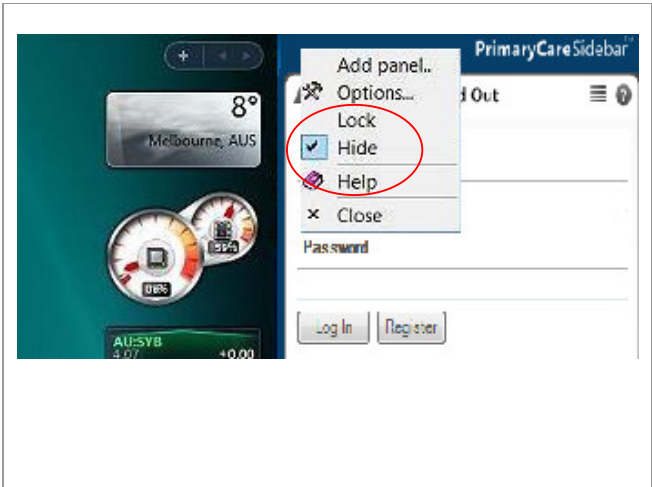
To do this we change the properties of the Vista sidebar.

- Right-click the Vista sidebar

	<ul style="list-style-type: none"> <li>• Choose 'Properties'</li> </ul>
	<ul style="list-style-type: none"> <li>• Unselect the option 'Sidebar is always on top of other windows'</li> <li>• Click 'Apply'</li> <li>• Click 'OK'</li> </ul> <p>The PrimaryCare Sidebar™ is now on the far right.</p>

'Auto-hide' mode

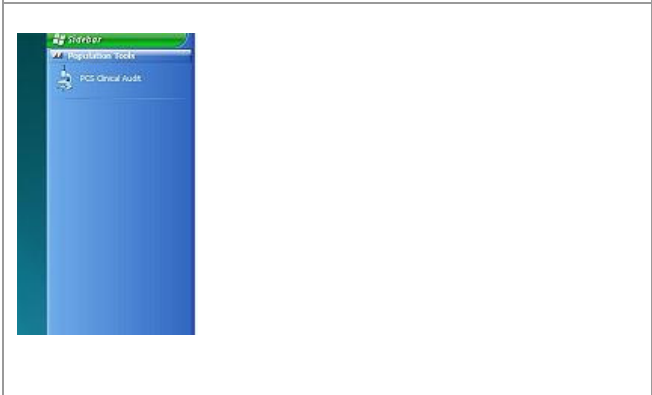
'Auto-hide' mode allows the PrimaryCare Sidebar™ to slide out on top of the Vista sidebar.



- Click the PrimaryCare Sidebar™ header
- Ensure 'Lock' is unselected
- Select 'Hide'



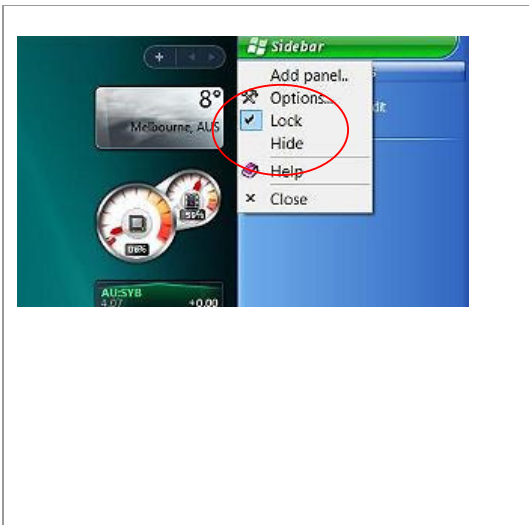
The PrimaryCare Sidebar™ becomes a thin blue bar at the right hand side of the screen



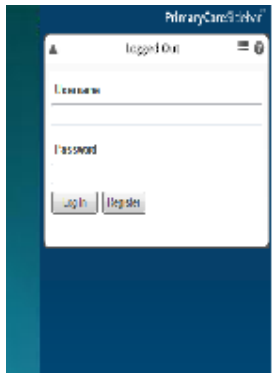
- Moving your mouse over the thin blue bar will cause the sidebar to slide into the screen. It will slide over the top of the Vista sidebar
- The example shows the Vista sidebar not visible as it is sitting behind the PrimaryCare Sidebar™
- Moving your mouse off the sidebar will cause it to slide out again

'Locked' mode

'Locked' mode allows the PrimaryCare Sidebar™ to be open permanently. This is a good option if you have a wide screen.



- Click the <sup>TM</sup>
- Ensure 'Hide' is un-ticked
- Tick 'Lock'



- The PrimaryCare Sidebar™ will now stay open at the right hand side of the screen

## 6 User Registration

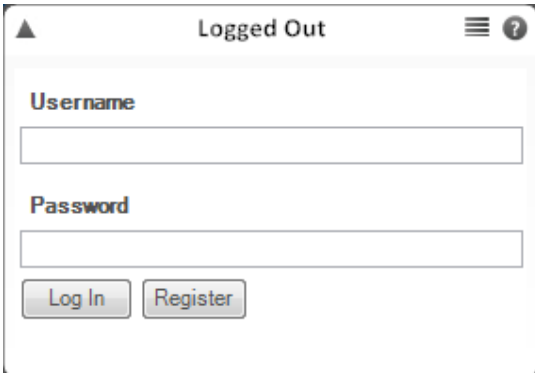
Once the PrimaryCare Sidebar™ is installed it will be displayed with only the login panel available. You will need to register for a username and password to be able to login.

Registration is managed through the PrimaryCare Sidebar™ Registration website. Once you have an account you can use this website to update your details and upgrade your account to be licensed for additional software tools as they become available.

This section provides information about the account registration process. Further information about how to access and upgrade your account is provided in the '**PrimaryCare Sidebar™ Registration and Licensing User Guide**', available from <http://help.pencs.com.au/primarycaresidebar.htm>

### 6.1 Registering for an account

A Registration Wizard is provided and will guide you through the registration process.



The screenshot shows a web interface for user registration. At the top, the text 'Logged Out' is displayed. Below this, there are two input fields: one labeled 'Username' and one labeled 'Password'. At the bottom of the form, there are two buttons: 'Log In' and 'Register'.

- Click the 'Register' button

The PrimaryCare Sidebar™ Registration website will open.

You are provided registration options

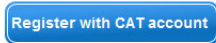
1. Create an account
2. Register with CAT account



Register your account & start using PrimaryCare Sidebar™ today!



Register here only if you DO NOT have an existing Clinical Audit Tool (CAT) account.



Existing Clinical Audit Tool (CAT) account holders MUST register here. You will need to use your existing CAT login and password to register for the PrimaryCare Sidebar™.

Welcome to a suite of primary health communication, decision support & assessment tools developed by Pen Computer Systems (PCS) and delivered to you by [HealthConnect SA \(HCSA\)](#).

Developed specifically for GPs and other health providers, the PrimaryCare Sidebar™ works with your existing clinical system, or stand alone, to assist you to deliver better care more easily.

With the support of HealthConnectSA, a federally funded initiative delivered through SA Health, PCS is delivering PrimaryCare Sidebar™ together with a variety of tools to GPs, Allied Health Providers and Specialists throughout South Australia.

The product licence, installation and product support is available free until 30 September 2009. Future funding to continue this offering is currently under negotiation.

Everything you need is already included

PrimaryCare Sidebar™ features components to assist you to deliver better patient care including:

- ✓ Health Provider Registry Quicklook
- ✓ Australian Type 2 Diabetes Risk Assessment Tool (AUSDRISK)
- ✓ Depression Anxiety Stress Scale (DASS)
- ✓ Kessler Psychological Distress Scale (K10)
- ✓ Traffic Light Foot Assessment Tool (TLFAT)
- ✓ Clinical Audit Tool (CAT)
- ✓ Clinical Audit Tool Prompts

[more](#)

*'PrimaryCare Sidebar' is a trade mark of Pen Computer Systems Pty Ltd ACN 060 416 622.*

### 6.1.1 Create an account



- Click the 'Create an account' button from the PrimaryCare Sidebar™ Registration website.
- The 'Create Your Account' page will open.

You will be asked to provide the following registration details:

- Your contact details including a preferred username and password
  - Your organisation details
- Complete all the details and click the 'Create my account' button.

Any invalid or incomplete details will be flagged for correction. If you have selected a username that is already in use you will be alerted to choose a different username.

You must correct any details before you will be able to complete the registration.



Note that links are available from the 'Create Your Account' page to the following information:

- Privacy Policy
- Terms of Use

It is recommended that you review these documents.

On successful completion of your registration you can use your username and password to login to the PrimaryCare Sidebar™.

### 6.1.2 Register with CAT account

Register with CAT account

If you are an existing CAT user you can register with your CAT account details. This means that you will only have to remember one set of account details to use the PrimaryCare Sidebar™ and CAT.

- Click the 'Register with CAT account' button from the PrimaryCare Sidebar™ Registration website.
- The 'Register with CAT Account' page will open.

You will be asked to provide your CAT username and password to sign-in.



The screenshot shows a web page titled 'PrimaryCareSidebar' with a blue header bar containing the text 'Register with CAT Account'. Below the header, the main content area is titled 'Sign-in with CAT account'. It features two input fields: 'CAT username' and 'Password'. Below the input fields, there is a yellow 'Sign-in' button and a blue 'Back' link.

The Registration screen will be pre-filled with the available details.

You will be asked to make any amendments and complete any further details required.

On successful completion of your registration you can use your username and password to login to the PrimaryCare Sidebar™.

## 6.2 Registration Further Information

Further information is available in the '**PrimaryCare Sidebar™ Registration and Licensing User Guide**'.

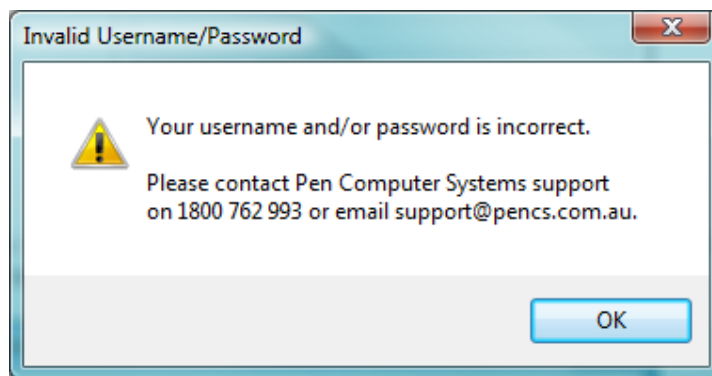
This guide is available from  
<http://help.pencs.com.au/primarycaresidebar.htm>

## 7 Logging In

Once you have registered, you can use your username and password to login in to the PrimaryCare Sidebar™ from the login panel.


- From the Login Panel, enter your details and click 'Log In'

If your details are invalid you will be prompted to contact Pen Computer Systems for assistance.



- On successful login you will see:
  1. Your full username displayed in the login panel
  2. The Patient Panel sitting below the Login Panel



- Click the  icon to expand the Login Panel to view more details



- My Account – this button will take you to the Registration website and your account details. Further information is available in the 'PrimaryCare Sidebar™ Registration and Licensing User Guide'.
- Logout – this button will log you out of the PrimaryCare Sidebar™.

- Click the ☰ icon to see Login Panel options



- About – contains application version information
- License – contains expiry details for each PrimaryCare Sidebar™ panels installed



- Log out – this button will log you out of the PrimaryCare Sidebar™.

## 8 Patient Panel and Clinical System

The patient panel displays details of the patient that is currently open in the GP Clinical System.

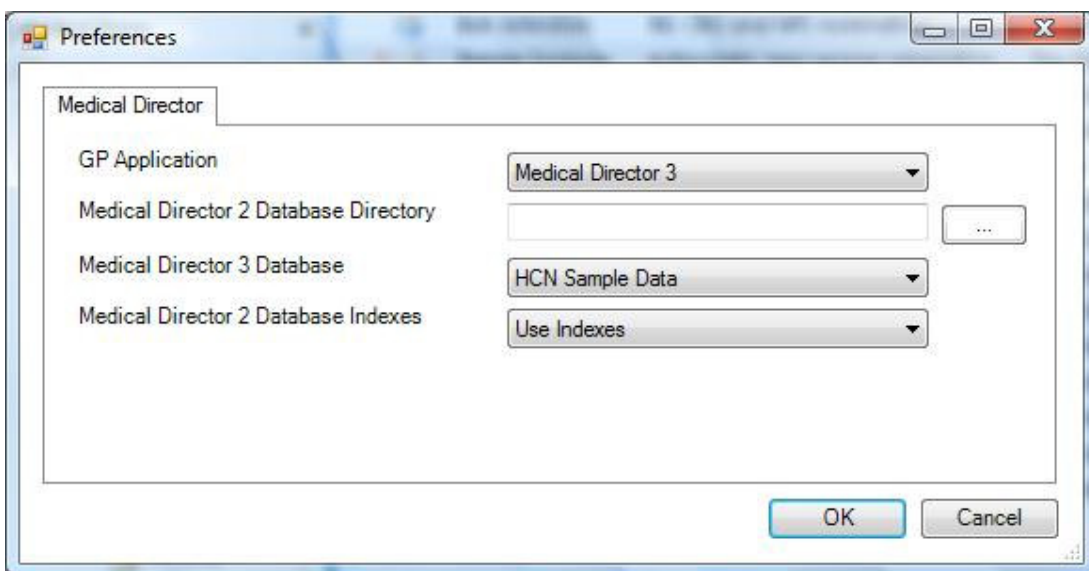
If the clinical system is not open it will show 'No Patient Selected'.

The installation process will set the Patient Panel to point to the clinical system by checking the users system to see what is installed. The settings selected can be checked and changed if required

- Right-click the Patient Panel
- From the pop-up menu choose 'Medical Director'



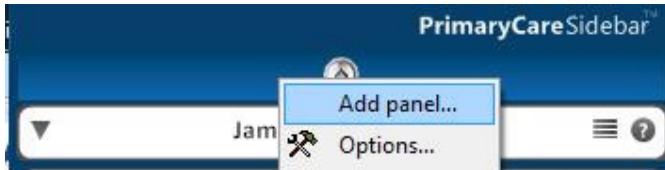
- Update the settings as appropriate and click 'OK'
- You will be required to restart the PrimaryCare Sidebar™



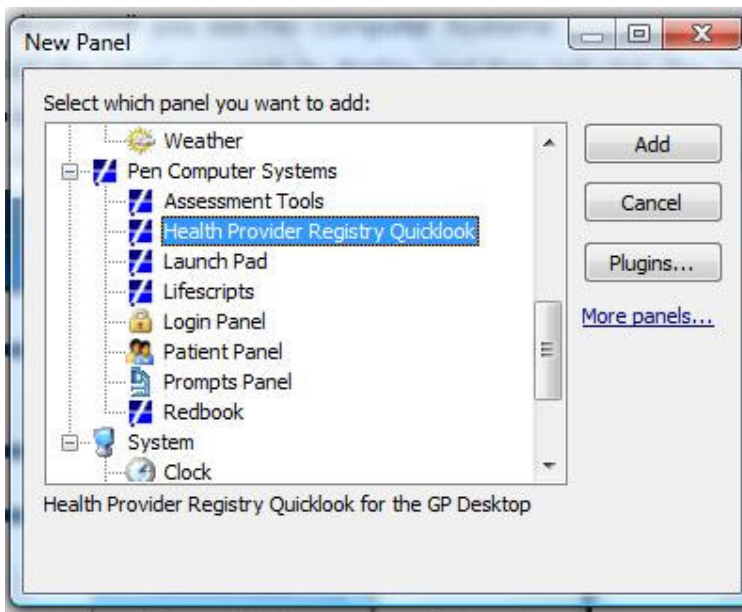
## 9 Adding and Removing Panels

### To add a panel

- Right click anywhere on the sidebar then select on 'Add panel...'



- Scroll down until you see Pen Computer Systems
- Left click the panel you wish to display and then select the 'Add' button



### To remove a panel

- Right click anywhere on the panel you wish to remove then select 'Remove Panel'



All changes will be retained when you next log in.

## 10 Backing up your Data – MD Users Only

The tools provided by the PrimaryCare Sidebar™ will save patient data independently of the GP clinical desktop system. No data is ever saved back to the clinical system.

It is important that this data is backed up.

The installation process will default the data storage location to the document storage service (XDS) folder created when Medical Director is installed. This folder can be found on the Medical Director server for client-server installations; or on local machine for single machine installation.

For a GP practice this will be a shared network drive which should have backup procedures already in place. Practices should confirm with their IT personnel that this data folder is included in the backup procedure.

For MD2 the folder location is normally: C:\MDW2\3rdParty\XDS

For MD3 the folder location is normally: C:\Program Files\Health Communication Network\Messages\3rdParty\XDS

Where backup procedures are not in place, tools that may be utilised are:

- a) File copy to off-site backup media (e.g. USB stick, USB hard drive, external network location)
- b) Vista - Start Menu>Control Panel>Backup and Restore Center
- c) Windows XP – Start Menu>All Programs>Accessories>Backup

See: <http://www.microsoft.com/protect/yourself/data/backup.mspx> for more details.

## 11 Frequently Asked Questions

### 1. How do I obtain a Username and Password?

Register for a username and password by clicking the 'Register' button on the PrimaryCare Sidebar™ login panel. The PrimaryCare Sidebar™ Registration website will open and provide you with further instructions.

### 2. Do I have to be an Administrator to run the installer?

Administrator rights are required to install the PrimaryCare Sidebar™ and Microsoft .NET Framework.

### 3. Will the installer be required to be run for each user of a PC?

No, additional users will not have to re-run the installer.

The Microsoft .NET Framework and PrimaryCare Sidebar™ are installed for all users.

Additional users should select:

**Start | Programs | Pen Computer Systems | Start Primary Care Sidebar**

If the new user would like to access components that were not previously installed the installer will need to be re-executed.

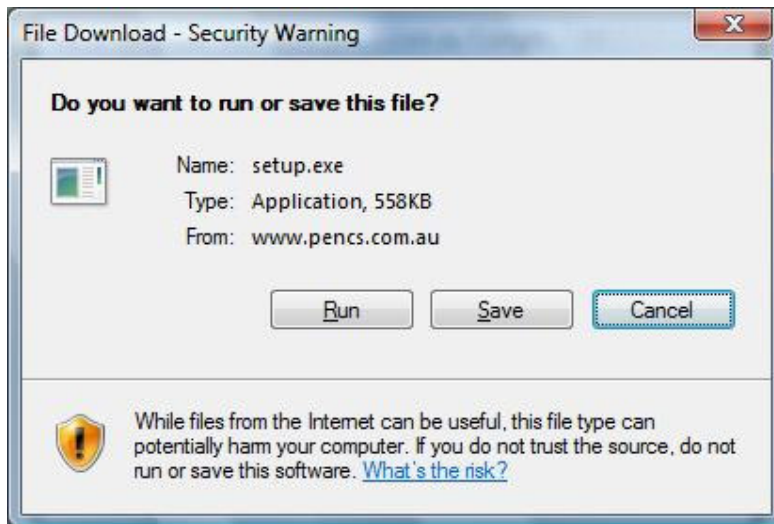
### 4. How do I know if I have the Microsoft .NET Framework 3.0 installed?

The 'Systems Requirements' sections shows how to check if the Microsoft .NET Framework 3.0 is installed.

## 5. How do I download to a server to avoid firewall issues and reduce download time?

At the start of the installation process where you normally would select 'Run', instead select 'Save' and save the file to a location on the server.

Each user can then access the file from the server and run the installer.



Alternatively, a CD can be requested from HealthConnect SA or your Division Representative.

## 6. Which operating systems are supported?

Please refer to the 'System Requirements' section of this document.

## 7. Which clinical systems can be used?

Please refer to the 'System Requirements section' of this document.

## 8. What is the Pen GP Desktop?

The Pen GP Desktop is an underlying component of the PrimaryCare Sidebar™. You may see this referred to in some parts of the installation or in error messages.

## 12 Troubleshooting

### 1. Installation

If you experience difficulties while trying to run the installer, please try the following:

- a. Temporary disable firewalls, virus scanners and anti-spyware programs
- b. Check that Microsoft .NET Framework 3.0 or later is installed (see FAQ 3 above)
- c. Ensure that you have administrative rights if you are installing the PrimaryCare Sidebar™ or the Microsoft .NET Framework
- d. Restart the PrimaryCare Sidebar™:

**Start | Programs | Pen Computer Systems | Start Primary Care Sidebar**

- e. Contact the PCS Help Desk on 1800 762 993.

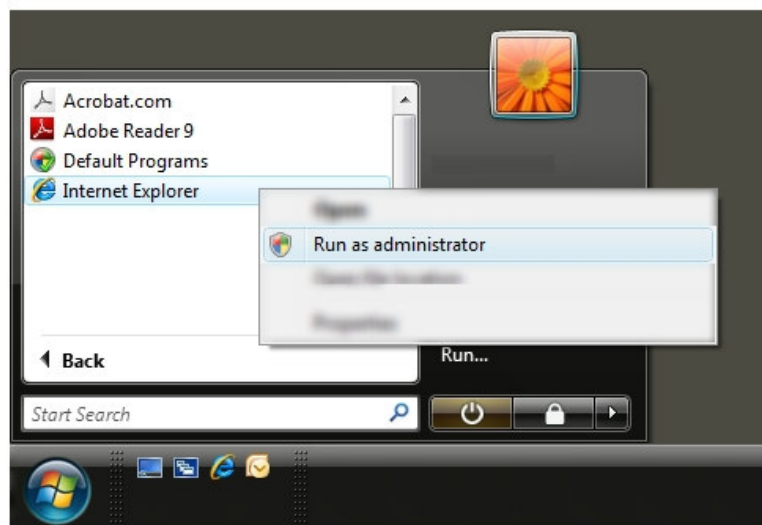
### 2. Vista Users: Pen Setup has not detected the applications you are trying to install

You receive the following error message:

**It is necessary to choose a configuration to install. ClickOnce requires browser to be run 'as administrator' to pass chosen configuration parameter.**

**For further information please visit <http://help.pencs.com.au/PrimaryCareSidebar.htm>  
Refer to the 'Troubleshooting' section of the 'Pen Setup User Guide'.**

- Click the Start button
- Right-click on the Internet Explorer icon
- Choose 'Run as administrator'
- Internet Explorer will open but will be running with Administrator privileges
- Enter the Pen Setup URL
- Installation should now proceed normally



### **3. Pen Setup gives an error because it was previously installed from a different URL.**

- From Add/Remove Programs, remove Pen Setup  
NOTE: All other PrimaryCare Sidebar™ applications previously installed are unaffected
- Install Pen Setup from the URL you have been provided with
- Installation should now proceed normally  
NOTE: PrimaryCare Sidebar™ applications previously installed are unaffected and still available from the sidebar