

## Installation & Setup Checklist

This checklist is provided to assist in the installation of the PCS Scheduler.

### A. Scheduler Installation

Make sure you have checked the following details before you run the installer.

<input type="checkbox"/>	The Scheduler should be setup on only one practice PC. Determine with the practice the PC this will be.
<input type="checkbox"/>	The Scheduler PC has a minimum of CAT 2.8 installed.
<input type="checkbox"/>	The Scheduler PC has completed a successful CAT collection.
<input type="checkbox"/>	The Scheduler PC is logged on with administrative privileges.
<input type="checkbox"/>	The scheduler installation .exe is saved to a local drive (not the desktop) on the Scheduler PC e.g. C:\Temp.
<input type="checkbox"/>	You have the mail server credentials handy (mail server name, username and password, a valid email-from address) if email notifications are required.
<input type="checkbox"/>	CAT is closed.
<input type="checkbox"/>	If the scheduler is already installed it should be uninstalled as per the User Guide instructions before being reinstalled.

### B. Scheduler Configuration

Following CAT Login:

<input type="checkbox"/>	Set the scheduler preferences: <b>Edit &gt; Preferences &gt; Scheduler</b> tab. Browse to the working directory (the directory the scheduler has been installed to)
<input type="checkbox"/>	The Scheduler menu option is available once the preferences have been set
<input type="checkbox"/>	Configure your Collection Schedule: <b>Scheduler &gt; Scheduled Tasks &gt; Collection</b>  To ensure the scheduler is working you may like to schedule a collection to run straight away and ensure this completes and notification is sent to the nominated email address. <ul style="list-style-type: none"> <li>• You can use Windows Task Manager to check the scheduler is running In the 'Processes' tab check the following is running:                     <ul style="list-style-type: none"> <li>○ MD – ClinicalAudit.exe (1 instance if CAT is not running, 2 instances if CAT is running)</li> <li>○ BP – BPS Clinical Audit.exe</li> <li>○ Zedmed – PenDataExtract.exe</li> </ul> </li> <li>• Once the collection has completed:                     <ul style="list-style-type: none"> <li>○ The Scheduler History will display an entry</li> <li>○ The new extract will appear when the extracts panel is refreshed</li> </ul> </li> </ul>