Primary Sense

Renewing the Expiring Client Secret ID – For practices

Enhanced user guide for practices with additional steps

Version 2

Renewing the Primary Sense Expiring Client Secret ID

On the server where the Primary Sense Extractor has been installed (see image 1):

1. Open the **Primary Sense Services Setup** (Extractor) application.
2. Click the **Setup** tab.
3. Click **Authenticate Practice**.
4. Click **Renew Secret**. Your new secret ID will be generated and will appear in the Client Secret field
5. Click the **Copy** button to take a copy of this for your records.
6. Click **Authenticate** to update the Extractor.
7. Click **Save** and **Close**.

Complete this and proceed to update the secret ID on <u>all</u> **Primary Sense desktops at the practice**.

The **Renew Secret** button will only be available within 30 days of the current secret's expiry date, otherwise it will be greyed out.
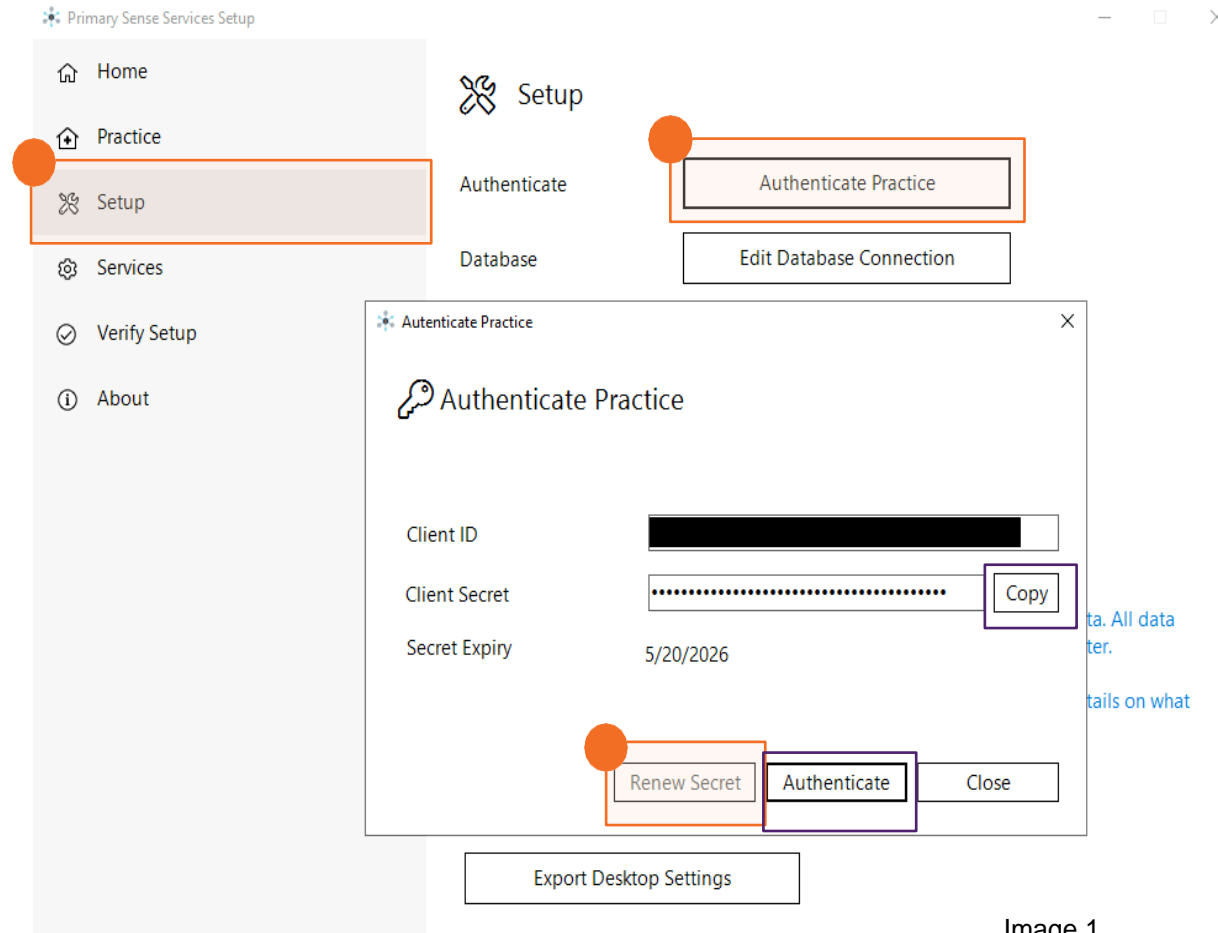
Image 1

Updating Your Primary Sense Secret ID

On the Practice Desktops

These steps will provide all your desktop applications with the updated Client Secret ID.

On the server where the Primary Sense Extractor has been installed:

1. Open the **Primary Sense Services Setup** (Extractor) application.

2. Click the **Setup** tab.

3. Click **Export Desktop Settings**.

4. Choose a location on the server (or use the default location) and **Save** to export the *desktop.json* settings file (see image 2).
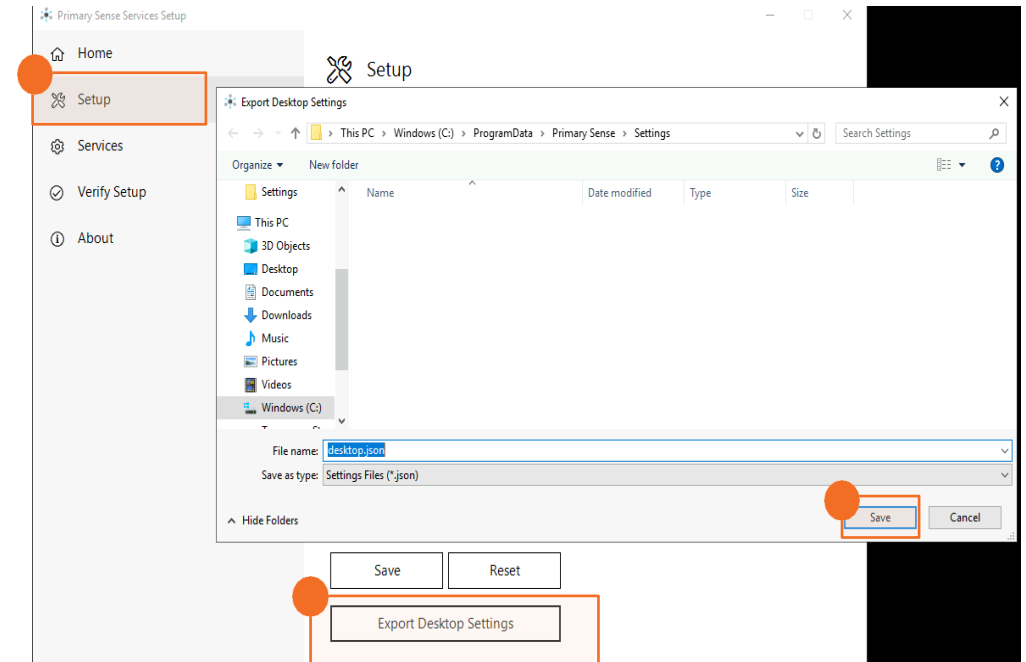

Image 2

Copy the extractor desktop settings file to all desktops.

Be sure to close Primary Sense Desktop Application on the desktop before you start this process.

1. **Close** the Primary Sense desktop application on the desktop (see image 3).

2. **Locate** the *desktop.json* file saved on the server (in your chosen location or the default location).

3. **Copy** the exported settings *desktop.json* file (see image 4) using Group Policy or similar if you wish to do this step remotely.

4. **Save** to or **Paste** (right click, paste – see image 5) the copy of the *desktop.json* file to the **C:\ProgramData\Primary Sense\Settings** folders on all **desktops** with the Primary Sense desktop application installed.

5. **Close** Primary Sense settings folder on the desktop.

6. **Restart** the Primary Sense desktop application to ensure settings are saved and the application is running correctly.
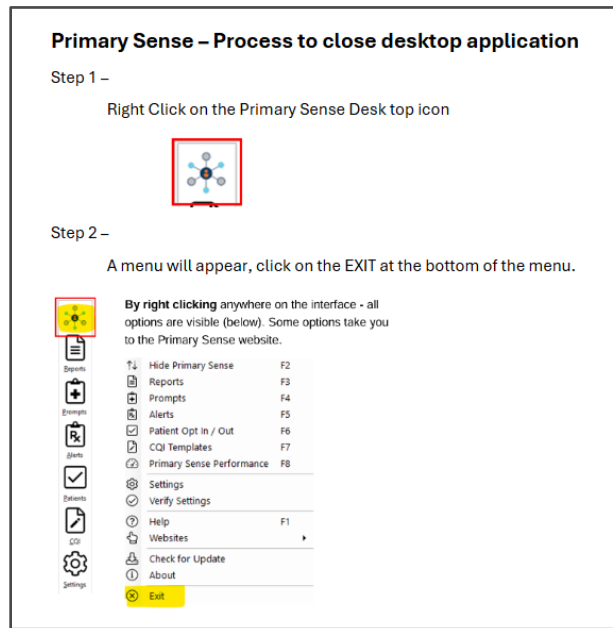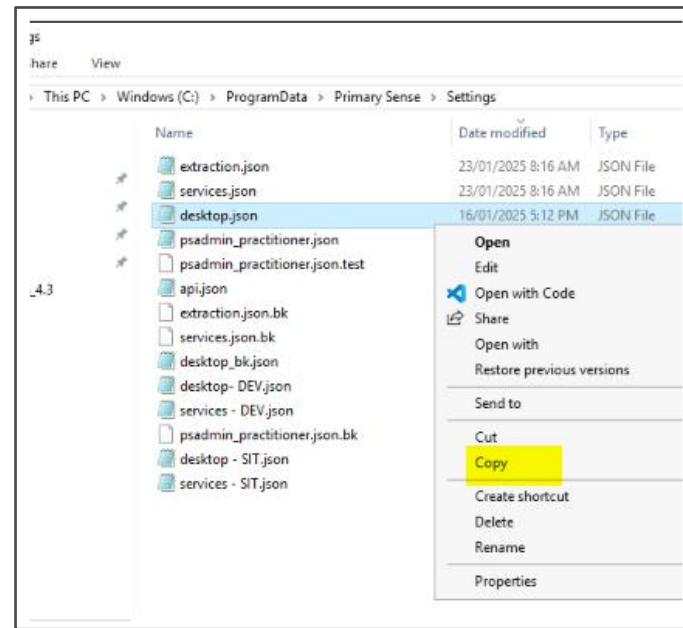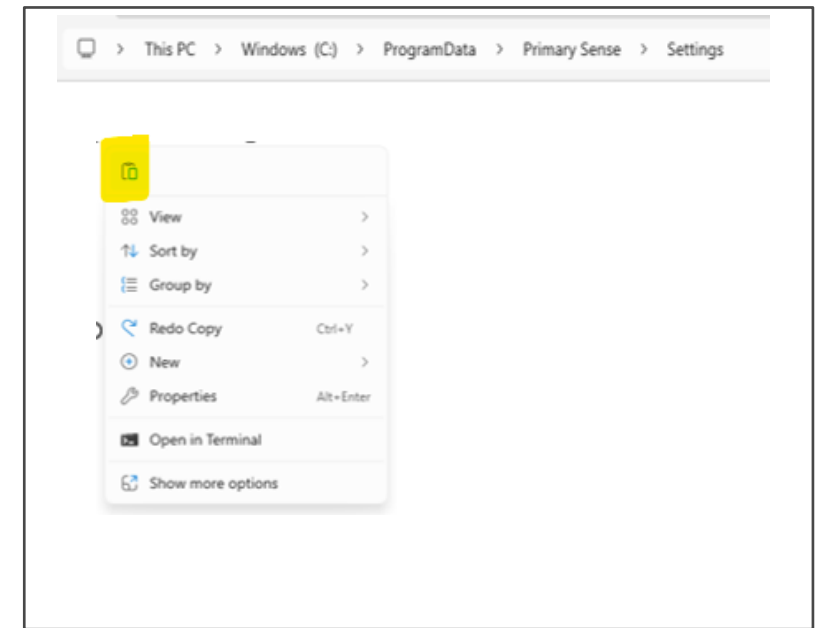
Image 3

Image 4

Image 5

FAQs

What is a Client Secret and when does it expire?

The Client Secret is used along with the Client ID to identify and authenticate the Extractor and any desktops at the practice (like a license key), allowing them to use Primary Sense. Client Secrets must be renewed every two years.

When does a practice need their Client ID/Secret?

The Client ID/Secret must be entered when installing Primary Sense on new PCs or reinstalling Primary Sense on existing PCs.

What happens when the Secret is renewed by a practice?

A new secret is generated; however the old secret will remain active in order to prevent disruption to Primary Sense functionality.

How do I know when the Secret will expire?

The current secret expiry date can be viewed from the Extractor (the Primary Sense Services Setup application) by navigating to the Setup tab and clicking Authenticate Practice. Practices should also start receiving weekly automated reminder emails every Monday once their secret is within 30 days of expiry.

What happens when a Secret expires?

If the secret is not renewed and updated across the practice before it expires, the Extractor and any desktops that are still using the expired secret will cease to function. You will also no longer be able to renew the secret from your end and will need to contact your PHN to have them re-issue the Client ID/Secret from their end.

Why is the Renew Secret button greyed out for me?

The Renew Secret button will remain unavailable and will appear greyed out until within 30 days of the current secret's expiry date.

What if I have trouble renewing the secret myself?

Contact your PHN for further assistance - they can arrange further support if required.

Contact Practice Support

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