

Amazon EDGE Server Provisioning

The EDGE server video series provides both issuers and Third Party Administrators, video demonstrations on how to complete the required tasks as part of operating an EDGE server. These videos will guide you through all of the tasks you need to complete as part of registering for an EDGE server, provisioning an EDGE server, and processing files on your EDGE server. As you can see, the videos are grouped depending on whether you are operating an Amazon EDGE or On-Premise EDGE server, and also whether your server will be, self-hosted or hosted by a TPA. Issuers and TPAs operating an Amazon EDGE server should access and view the videos listed here. Issuers and TPAs operating an On-Premise EDGE server should access and view the videos listed here. All of these videos and their accompanying job aids can be found on REGTAP.

Hello and welcome to this video tutorial on how to provision an Amazon EDGE Server. The following steps will provide Amazon EDGE issuers an overview of how an Amazon EDGE server is provisioned and how issuers can confirm provisioning and connect to their server. You should have completed the steps within the EDGE Server Registration Job Aid before continuing to this video guide.

Following CMS approval, your EDGE server request status will update to Pending Provisioning. The information provided during the registration request is now automatically passed as parameters to the EDGE provisioning script. The script is executed to create the EDGE server and there is no further action required by the user. Once this process initiates, the request status will update to Provisioning in Progress. Once this occurs, the request will clear from the Issuer Submitter's inbox. The Issuer Submitter will need to Search for the request at this point to see the status of Provisioning in Progress.

Step 1:

- First, click the **Search Requests** button at the **top right**.
- In the Search Requests screen, select **Issuer HIOS ID** from the **Search Field dropdown menu** and enter **your HIOS Issuer ID** in the **Search Value Field**. When finished, click the **Search** button to display the results. Any active requests associated with your Issuer HIOS ID will display.
- The request will display with a status of Provisioning in Progress.
- At this point, you can **refresh** the page periodically to track the status as it updates.
- When provisioning has completed, it will update to **Provisioned**.

This indicates that the Amazon EDGE server has successfully connected with the Phone Home service for the first time. Please note, the provisioning process can take up to 60 minutes to complete.

Following successful provisioning, Issuer Submitters may need to update point of contact information (all requests) or update TPA information (TPA-hosted ONLY) on their EDGE server request. The following steps provide guidance on how Issuer Submitters can access their Provisioned server request and update information.

Step 2:

- From your homepage, click the **Manage EDGE Server** button at the **top right**.
- On the **Manage EDGE Server** screen, the Provisioned request associated to your **Issuer HIOS ID** will display.
- To update information on this request, click the **View** button from the **Action column** on the right.
- From the **EDGE Request screen**, you can update any POC or TPA-related information as applicable to your EDGE server.
- When finished making updates, scroll to the bottom of the screen and click the **Submit** button

Step 3:

- Upon clicking Submit, a window will display asking you to **SUBMIT REQUEST** to save the updates and initiate the approval process or **CANCEL** to return to the previous page without saving.
- Click the **Submit Request** button.
- Issuer Submitters will be taken back to their homepage after submitting the updates.
- The request will go back through the approval process. No further action is required by the Issuer.

Now, let's walk through the steps Issuer Submitters will need to take if provisioning fails. The EDGE Registration site monitors the completion of the AWS provisioning script. If the provisioning script does not complete successfully, this will indicate that the server details provided by the issuer or TPA during the registration process were incorrect. The status of the request will update to Provisioning Failed and the request will be sent back to the Issuer Submitter's inbox.

When provisioning has failed, the Issuer Submitter will need to contact the CMS Helpdesk to determine the cause of the failure.

The Helpdesk will provide more details on the cause of the failure and the resolution process.

You can reach the CMS Help Desk by emailing: CMS_FEPS@cms.hhs.gov or by calling 1-855-CMS-1515

Once the cause of the failure has been determined, the Issuer Submitter will need to update the request and resubmit. The request will then return to a status of Pending Provisioning and initiate the provisioning process again.

Step 4:

The next step for Issuers following successful provisioning is to download PuTTY in order to connect to their provisioned server. Please note, issuers may use an SSH Client of their choice. PuTTY is a commonly used application for these purposes, and the steps for downloading and configuring Putty are covered here. Issuers will need to adapt these instructions if they choose to use a different SSH client.

- Let's get started. First go to **www.putty.org**.
- Once at the PuTTY home page, click "**You can download PuTTY here.**"
- The PuTTY download page will appear. Take the steps to download both **putty.exe** and **puttygen.exe**.
- Now, **run puttygen.exe**. The following window will appear.

- Click **Load** and then select the **Key Pair file** that was **saved to your computer** in the Request an AWS Instance Job Aid and video.

If you do not have this Key Pair, you will need to coordinate with the person that requested your AWS instance to obtain the Key Pair. The file should be in **.pem format**.

Step 5:

- After loading the Key Pair file from your computer, the following **PuTTYgen notice** will display.
- Click **OK**
- This message is alerting the user that the Key Pair file will be converted to **.ppk format** in order to use with **PuTTY**.
- After loading the key pair, click **Save private key button** in the **PuTTY Key Generator window**.
- In the **PuTTYgen Warning window**, click **Yes** to save the key without a passphrase.
- A local files window will then display allowing you to save the key to your computer as a **.ppk format**.

Be sure to save the private key to a secure location on your computer. You will need this private key as part of the putty configuration that is covered in later steps.

The next activity is to run and configure Putty.exe. Please remember, the following steps will need to be executed again if the server ever crashes or is restarted for any reason. If this occurs, some of the information used below, such as the public IP address, will change and issuers will need to remember to use the new information.

Step 6:

- First, access the AWS home page by going to **aws.amazon.com** and logging into your AWS account.
- Next, click **Services**, then All **AWS Services**, and then click **EC2**.
- Then, click **Instances** on the upper **left corner** of the page.

You will find all available EDGE server instances listed at the top. The correct server instance should have an Instance State set to running. Issuers will find the available EDGE server instance listed at the top. The correct server instance should have an Instance State set to running. Issuers can identify their correct server by finding their Issuer HIOS ID in the Name column on the right.

Step 7:

- After selecting the **EDGE Server Instance**, find the **public IP address** in the **bottom** section of the page.
- Write down the public IP address as you will be entering this address as part of the **Host Name** when **configuring PuTTY.exe**.
- This address will be used in the Host Name entered in the following steps.

Please remember, if the server ever restarts for any reason, this public IP address number will change. When issuers execute these steps again, they will need to note the new IP address.

- Now locate and run the **PuTTY.exe** program that you **downloaded to your computer**.
- After running PuTTY.exe, you will see the PuTTY configuration window
- Select the Connection type **“SSH”** and then enter **“ec2-user@** and ENTER the **public IP address** noted above into **“Host Name (or IP address).”**
- Now click **the SSH dropdown** from the **Category list** on the **left** side of the PuTTY Configuration window and should then select the **Authentication radio button**
- You should see **Authentication Options** and click **Browse**.
- Now find your **PuTTY Private Key** and click **Open**. This is the .ppk file that was created and saved previously.
- Then click **Open** in the PuTTY Configuration window.
- After clicking Open, the following security alert will appear verifying that you trust the host and that you want to add the key to PuTTY’s cache and continue connecting.
- Click the **Yes** button to continue.

Step 8:

- When logging into the server for the first time, you will need to enter the following password: **edge server**.
- You will then need to enter and then retype a **new password** for your server for future logins.
- After entering your new password, the PuTTY session will close automatically.
- You will need to log back into PuTTY again, enter your **host name** and attach your **Private Key file** and run the program.
- You will now see the PuTTY program, and should enter **“edge version”** into the **Command Line** and press **enter**.

The EDGE version command will check if the system is running on a regular version and will generate database and application updates automatically when an application update is available and the issuers access the EDGE Server.

Once this is complete, the EDGE server is successfully running and connected. Amazon EDGE Issuers can now begin processing files.

This completes the AWS EDGE Server Provisioning module. Additional resources can be found on REGTAP support, please send all questions to CMS Help Desk by. For EDGE Server emailing: CMS_FEPS@cms.hhs.gov or call 1-855-CMS-1515