508 Compliant Version

On-Premise Server Provisioning

Introduction

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 server 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 On-Premise EDGE Server. The following steps will provide On-Premise EDGE server issuers and overview of how to download On-Premise provisioning installation scripts, use WinSCP to transfer those files from their computer to their server and connect to the server using PuTTY. You should have completed the steps within the EDGE Server Registration Job Aid before continuing to this video guide. The provisioning process begins following CMS approval. After approval, your EDGE server request status will update to Pending Provisioning and return to your inbox.

Step 1:

- From the homepage, the Issuer Submitter will see the request in their inbox with a status of "**Pending Provisioning.**"

Step 2:

- At this point, the request status will then update to "**Provisioning in Progress.**" Once this occurs, the request will clear from your inbox. You will need to Search for the request at this point to see the status of Provisioning in Progress. 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.

Step 3:

- 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.

Step 4:

- The request will display with a status of "**Provisioning in Progress**." This status indicates that the On-Premise EDGE server installation scripts are now available. Click the **View** button from the **Action** column of the request to open the request and locate the On-Premise Installation scripts.

Step 5:

- From the Request screen at the top, users will find download links for the three files for On-Premise EDGE server installation:
    - Installation Information
    - Deployment Script
    - Property File
- **Follow the download instructions and save the programs locally to your computer. Save the files in a secure location where they will be easily accessible for the subsequent steps in this job aid.**

Step 6:

- After downloading the scripts, Issuers will now need to transfer the installation scripts they downloaded from the EDGE Registration site from their local computer to their server using WinSCP, connect to their server using PuTTY and confirm successful provisioning.
- First, go to www.winscp.net to download WinSCP in order to transfer the installation scripts from your computer to your server. However, you may use a SFTP *c*lient of your choice. WinSCP is a commonly used application for this purpose, and for sample purposes, the steps for downloading and configuring that tool are included here. You will need to adapt these instructions if you choose to use a different SFTP client.

Step 7:

- From the homepage, click the **Go to Download Page** link.
- Next, click the **Download WinSCP** link at the top.

Step 8:

- Click and download the Installation Package link on the screen:

Step 9

- Once download, Open and run the WinSCP program downloaded in the previous step. After running the program, the following window will appear.
- In the WinSCP login window, enter the IP address for your sever in the **Host Name** field. Then enter the name and password of your On-Premise server in the **User Name** and **Password** fields. This is the name and password you generated when setting up your server. Click the **Login** button when finished.
- After clicking **Login**, two menus will appear side by side: your Local computer files on the left side and your On-Premise server files on the right. Find the three files you downloaded from the EDGE Registration site on your

local computer (edge property file, edge key file and edge application files). Click and drag those files from the left side (local computer) to the right side (server). You can drag and store those files in a location of your choice on the server side.

Step 10:

- Once your files are loaded to your server, the next step is to download PuTTY in order to log into your server. However, issuers may use the SSH Client of choice. PuTTY is a commonly used application for this purpose, and for sample purposes, the steps for downloading and configuring that tool are included here. Issuers will need to adapt these instructions if they choose to use a different SSH client.

Step 11:

- First, go to www.putty.org, and from the homepage, click the You Can Download PuTTy here link
- The PuTTY Download page will appear. Click to download PuTTY.

Step 12:

- After downloading and running PuTTy, you will see the PuTTy configuration window.
- Enter the IP address of your server in the **Host Name** field. Click the **Open** button when finished.
- Please NOTE: The following steps will involve entering several different commands in PuTTY. The format and spacing specifications for the commands are explained in each step of the accompanying On-Premise EDGE Server Provisioning Job Aid.

Step 13:

- Once the PuTTY program opens, enter your On-Premise username (same username entered previously when logging into WinSCP). Click **Enter**.
- Next, enter your password and click enter (this is the same password entered previously when logging into WinSCP).

Step 14:

- After connecting to the server, you will want to make a new directory to store your installation files downloaded from the EDGE Registration site and transferred to the server using WinSCP. Next, enter command **Ls – 1** and click **Enter**. This will create a listing of all available files currently on the server. Enter command **mkdir edge** and click **Enter**. This will create a new folder.

Step 15:

- Next, enter command **cd edge** and then click **Enter**. This will take the user to the **edge** folder created in the previous step. The folder will be empty since it was just created.

Step 16:

- Next, enter the command **tar xvf ~/edge-app-ope.tar.gz** and click **Enter**. This will unzip the On-Premise Installation Information file downloaded from the EDGE Registration site. The script that runs will create different directories on your server, including the file inbox, file outbox, database and installation scripts.

Step 17:

- Next, enter command **cd config/** and click **Enter**. This opens the Config folder. You will need this folder to load and run the Property file.

Step 18:

- Next, enter command **cp ~/edge.keys .** and then click **Enter**. Then, enter command **cp ~/edge.properties .** and click **Enter**. This will open the Deployment Script and Property file downloaded from the EDGE Registration site.

Step 19:

- Next, enter command **vi edge.properties**, then click **Enter**. This will open the Properties file in an editable format in PuTTY as seen here.

Step 20:

- Click **"I"** in order to edit the text. Then enter a password in the **dbPassword** field. This password field will be blank when first running this program. Enter a password and save this password to a secure location. This password will be used to log into the database.

Step 21:

- Next, click **ESC**, then type command **:wq** and click **Enter**. This will save the file with the new password and exit the file.

Step 22:

- Next, enter command **cd ../install/** and click **Enter**. This will open the Install folder.

Step 23:

- Next, enter the command **sudo ./installApplication.sh** and click **Enter**. Next, enter your password and click **Enter** (this is the same password used to log into your server using WinSCP). This will install the EDGE Application.

Step 24:

- After clicking enter in the previous step, the script will run to install the EDGE application. This process can take 2-3 minutes to complete. Once finished, verify that there are no error messages. If no error messages display, provisioning was successful.

Step 25:

- If the On-Premise provisioning script does not complete successfully, this indicates that the there is an error in the scripts. If provisioning fails, you will see error messages in the PuTTY program while attempting to install the EDGE application. At this point, you will need to contact the **CMS Helpdesk** to determine the reason provisioning failed. The CMS Helpdesk will provide more details on the cause of the failure and the resolution process. You can contact the **CMS Help Desk** at:
    - CMS Help Desk email: CMS_FEPS@cms.hhs.gov
    - CMS Help Desk phone: 1-855-CMS-1515
- Once the cause of the failure has been determined and the installation scripts have been updated, the request will enter the provisioning process again and return to a status of "**Pending Provisioning**." You can return back to the request, open it and download the updated installation scripts again and re-execute the provisioning process.

Step 26:

- After successfully provisioning, you may elect to configure your On-Premise EDGE server to pick up files automatically for processing by setting up cron. In PuTTY, enter command: crontab –e and press Enter.
- Next, setup the timing for cron to run. Please note, this configuration is setup to run cron every minute – you may choose to configure it to run on a different time.
- Press "I" to enter the following command
- Enter command: */1 * * * * /opt/edge/bin/edge ingest
- Then, press ESC and enter command: :wq. This will save and exit the file.

Step 26:

- Once the script completes successfully, log back into the EDGE Registration site, search for your request and confirm that the status is now "**Provisioned**."
- Please NOTE: It will take between 5-10 minutes from the time the scrip completes to the EDGE Server request status updating to PROVISIONED.

Manage Edge Server Steps

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 27:

- From the homepage of the EDGE registration site, click the **Manage EDGE Server** button at the top right

Step 28:

- On the Manage EDGE Server screen, the Provisioned request associated with your Issuer HIOS ID will display. To update information on this request, click the **View** button from the **Action** column on the right.

Step 29:

- 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.
- 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.
- You will be taken back to your homepage after submitting the updates. The request will go back through the approval process. No further action is required by the Issuer.

Conclusion

This completes the On-Premise EDGE Server Provisioning video tutorial. Your On-Premise server should be connected and running. Additional resources can be found on REGTAP and for EDGE Server support, please send all questions to CMS Help Desk by emailing:CMS_FEPS@cms.hhs.gov or call 1-855-CMS-1515.