Intelli Medica

Medical Assistance and Registration System

Installation Guide

Contents

1.   Prerequisite

Before you install, make sure that the following prerequisites are met:
a.   Install Pega Platform 8.5 and then verify the
server.
b.   Review the Cosmos application.

IMPORTANT NOTE: Application is already hosted in a Pega Trial Instance as mentioned below and you may not need to install again.

Application is hosted in Pega Trial instance which may go to hibernation in absence of active development. If you are unable to access this trial instance then please contact the application owners or Pega Trial helpdesk. Contact emails are available in Devpost. Invitation is sent to PegaCommunityHackathon@pega.com for Trial instance.

https://1qside2v.pegace.net/prweb/

2.   Installing the Application

Follow these steps to install the application
☐ Importing the application bundle
☐ Importing the core-3.4.0.jar
☐ Optional: Importing the Components within application

1.   Importing the application bundle

Login as Administrator/Developer access group and follow the below steps to import.
a.   In the header of Dev Studio, Click **Configure > Application > Distribution > Import**.
b.   Click **Choose File**, browse for the **IntelliMed_v2.zip** file from your distribution media, and follow the wizard instructions.
c.   Check the available components by clicking **Configure > Application > Components** and verify the below components are present in the rule base.
   i. Twilio SMS Gateway
   ii.   Number Verify
   If any of the components are missing, please follow the Optional: Importing the Components instruction.
d.   Open **IntelliMedica**:**01.01.01** application rule instance from **Records > Application Definition > Application** in Dev Studio and verify whether the above mentioned components are present in **Enable Components** section.

2. Import core-3.4.0.jar file

a. In the header of Dev Studio, Click **Configure > Application > Distribution > Import**.

b. Click **Choose File**, browse for the **core-3.4.0.jar** file from your distribution media, and follow the wizard instructions.

3. Optional: Importing the Components within application

This is an optional step as mentioned in above section. Open **IntelliMedica:01.01.01** application rule instance from **Records > Application Definition > Application** in Dev Studio and follow the below steps.

a. For **Twilio SMS Gateway** : In the **Enable Components** section click on **Manage components** button and then select **Install New**. Browse for the **TwilioSendMessage.zip** file from your distribution media, and follow the wizard instructions.

b. For **Number Verify** : In the **Enable Components** section click on **Manage components** button and then select **Install New**. Browse for the **NumberVerify.zip** file from your distribution media, and follow the wizard instructions.

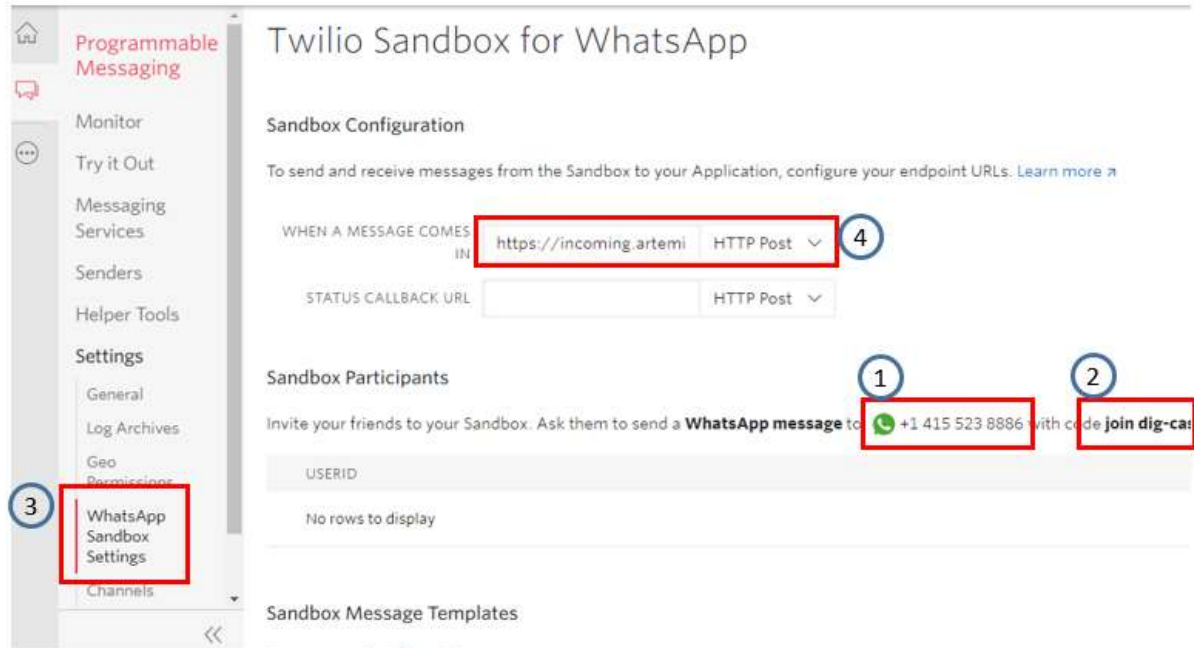## *3. Unified Messaging Channel Configuration*

1. Twilio Set Up
   a. Create a new account in Twilio(www.twilio.com).
   b. After setting up a valid Twilio account, note the Account SID and AUTH Token(image 1).

Image 1:
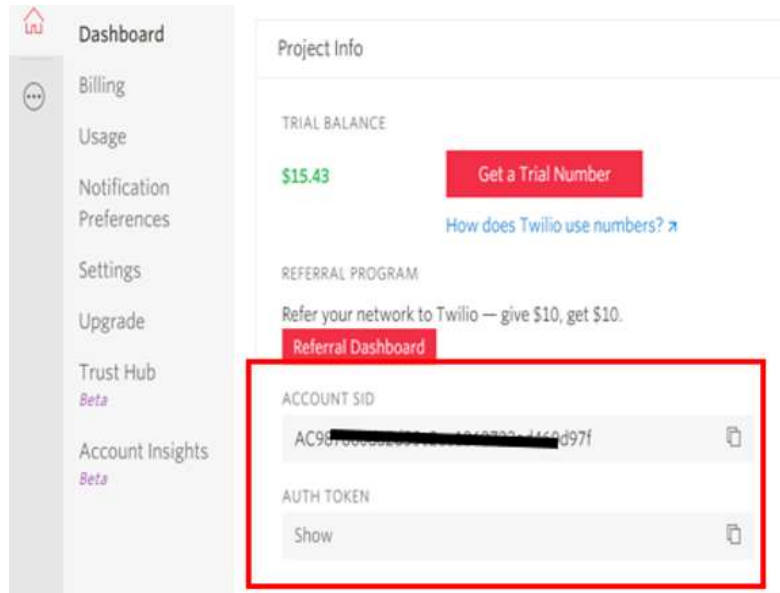
   c. Navigate to **Programmable Messaging Dashboard -> Settings-> Whatsapp Sandbox Settings**. (Number 3 in **Image 2**)
   We have to send an Whatsapp message for subscription [like **Join Setting-castle(**Number 2 in **Image 2**)] to a specific number (not our PROD Twilio number - (+1 415 523 8886 - Number 1 in **Image 2**) for further communication. This is a one-time set up. Take a note of this WhatsApp number and the code given to start testing for the Sandbox.

Image 2:

2. Pega Set Up
We need to get the **Manager ID and Manager Key** to enable channels in Unified Messaging Channel.

   a. Raise an SR with Pega to get Manager ID and Manager Key for Unified Messaging security.
   b. Open the Pega Application definition and navigate to Integration and Security tab . Input the Manager ID and Manager Key received from Pega in the fields under Unified Messaging security(Image 3).

Image 3:
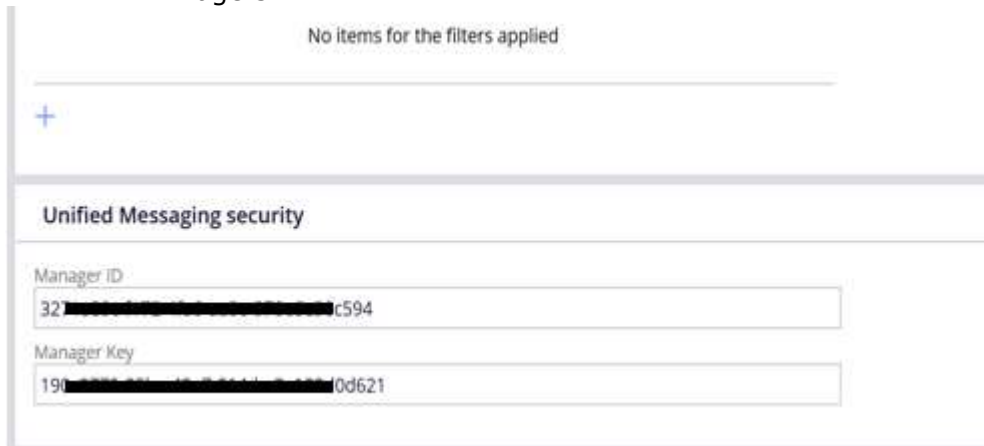
   c. Navigate to the Channels and Interfaces from the Application Menu and open the Unified Messaging Channel option.

   d. Navigate to the **Connection** tab proceed to click the **Manage Connections** button and select **WhatsApp** from the options.

e. Click on the Add New Twilio WhatsApp Number and input the WhatsApp number , Account SID and AUTH Token(what we got from Image 1) in the fields and submit it(image 4).

Image 4:

At your Service

Connection	Twilio WhatsApp 🟢
Phone Number	14155238886
Account SID	AC207891f4effe0a3fb12e9708a351b3c2
Auth token	****************************** Show token
Webhook	https://incoming.artemis.pega.digital/twilio-whatsapp

(Delete connection)

f. Copy the webhook URL

3. Now Navigate to Twilo **Settings->WhatsApp Sandbox Settings** (Number 4 in Image 2) and input the webhook url in the *When a message comes in* endpoint url and Save it.

4.   Component Configuration

Twilio SMS Gateway
Follow the below steps to complete the setup for sms gateway.
   a. Get the Twilio ApiKey from Twilio site (www.twilio.com).
   b. Update the **TwilioBasicAuthentication** Authentication Profile by clicking **Records > Security > Authentication Profile.**
         i.   **User Name = Twilio ACCOUNT SID**
         ii. **Password = Twilio AUTH TOKEN**

Number Verify:
Create an account in https://numverify.com and generate an apikey from the portal, use the same in Pega application.

5.   Update System Settings

Update the below Dynamic System Settings.

TwilioPhone : Add the Twilio phone number which is procured to send the sms.
TwilioApiKey : Add the Twilio apikey which will be used for service call.
**NumVerifyApiKey** : Add the NumVerifyApiKey apikey which will be used for service call.

List of Dynamic system Settings:

Instances ▾ of Dynamic System Settings	
Owning Ruleset*	▼ **Setting Purpose***
TwilioSMSGateway_20200613T184426247	TwilioPhone
TwilioSMSGateway_20200613T184426247	TwilioApiKey
NumberVerify_20210324T183301541	NumVerifyApiKey

[Note: Values for these details were removed for security purpose. Please setup a new account as we have already mentioned how to get them.]

6.   Install Intelli Medica in Mobile

- Install "Pega Mobile Preview" from Google Play store or App store.
- Open "Channel and Interface" ->Intelli Medica -> Click on the highlighted icon and keep the QR code handy.(screen shot below)
- Open Pega Mobile Preview app on mobile and scan the QR code.
- Login using **BrandyFloyd/rules@2021**.
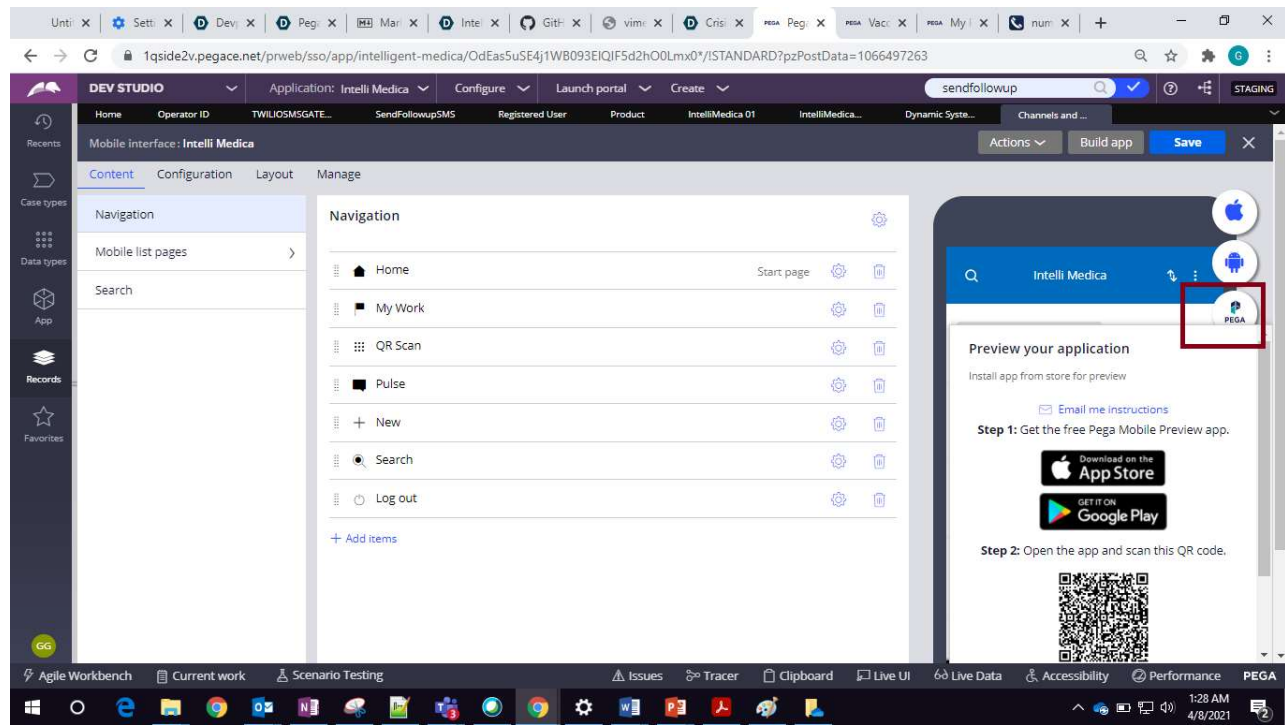
7.   Verify Operators

Verify the below Operators, whether they are disabled or not. If disabled, please enable them.

JohnHolms/rules@987
BrandyFloyd/rules@123
UMCChatBot/rules@987