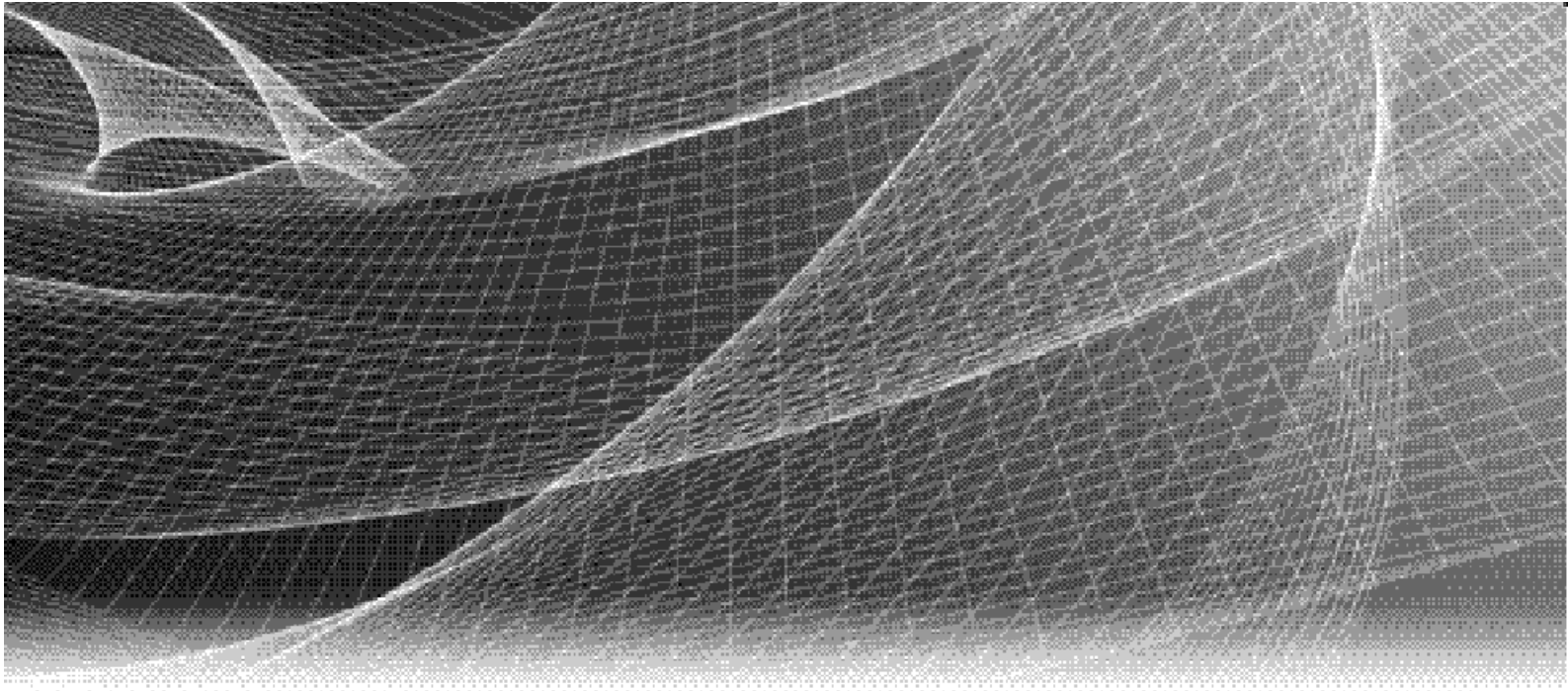

Secure Remote Services

Release 3.38

Installation Guide

REV 01

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PREFACE

As part of an effort to improve its product lines, Dell EMC periodically releases revisions of its software and hardware. Therefore, some functions described in this document might not be supported by all versions of the software or hardware currently in use. The product release notes provide the most up-to-date information on product features.

Contact your Dell EMC technical support professional if a product does not function properly or does not function as described in this document.

NOTICE

EMC Secure Remote Services (ESRS) is being rebranded to Secure Remote Services (SRS).

Note: This document was accurate at publication time. Go to Dell EMC Online Support (https://support.emc.com) to ensure that you are using the latest version of this document.

Purpose

This guide is part of the Secure Remote Services (SRS) Release 3.38 documentation set, and is intended for use by customers and prospective customers.

Readers of this guide are expected to be familiar with the following topics:

- Local network administration
- Internet protocols
- Dell EMC storage system characteristics and administration

Related documentation

The following Dell EMC publications provide additional information:

- *Secure Remote Services Release Notes*
- *Secure Remote Services Technical Description*
- *Secure Remote Services Pre-Site Checklist*
- *Secure Remote Services Site Planning Guide*
- *Secure Remote Services Port Requirements*
- *Secure Remote Services Installation Guide*
- *Secure Remote Services Operations Guide*
- *Secure Remote Services Policy Manager Operations Guide*
- *SRS Policy Manager 6.8 Installation Guide - Standard Windows*
- *SRS Policy Manager 6.8 Installation Guide - Integrated AD (Windows)*

Documentation conventions

Dell EMC uses the following conventions for special notices:

DANGER

DANGER indicates a hazardous situation which, if not avoided, will result in death or serious injury.

WARNING

WARNING indicates a hazardous situation which, if not avoided, could result in death or serious injury.

CAUTION

CAUTION, used with the safety alert symbol, indicates a hazardous situation which, if not avoided, could result in minor or moderate injury.

NOTICE

NOTICE is used to address practices not related to personal injury.

Note: A note presents information that is important, but not hazard-related.

Typographical conventions

Dell EMC uses the following type style conventions in this document:

Bold	Use for names of interface elements, such as names of windows, dialog boxes, buttons, fields, tab names, key names, and menu paths (what the user specifically selects or clicks)
Italic	Use for full titles of publications referenced in text and for variables in body text.
`Monospace`	Use for: • System output, such as an error message or script • System code • Pathnames, file names, prompts, and syntax • Commands and options
`Monospace italic`	Use for variables.
`Monospace bold`	Use for user input.
[ ]	Square brackets enclose optional values
|	Vertical bar indicates alternate selections — the bar means “or”
{ }	Braces enclose content that the user must specify, such as x or y or z
...	Ellipses indicate nonessential information omitted from the example

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Dell EMC support, product, and licensing information can be obtained as follows:

Product information — For documentation, release notes, software updates, or information about Dell EMC products, go to Dell EMC Online Support at:

https://support.emc.com

Technical support — Go to Dell EMC Online Support and click Service Center. You will see several options for contacting Dell EMC Technical Support. Note that to open a service request, you must have a valid support agreement. Contact your Dell EMC sales representative for details about obtaining a valid support agreement or with questions about your account.

Your comments

Your suggestions will help us continue to improve the accuracy, organization, and overall quality of the user publications. Send your opinions of this document to:

techpubcomments@emc.com

CHAPTER 1
System requirements

This chapter provides the specifications that you will need to install and provision SRS. Topics include:

- Preparing your environment 10
- Specifications for SRS Virtual Edition and SRS Docker Edition 10

Preparing your environment

Follow the KB solution for the Network Requirements:
https://support.emc.com/kb/494729

Port 443 and 8443 have to be allowed outbound.

Specifications for SRS Virtual Edition and SRS Docker Edition

Table 1 on page 11 shows the minimum configuration of the SRS deployed on the ESX Server.

Table 1 Specifications for SRS Virtual Edition

Type	Requirements	Dell EMC provided software	Notes
SRS Virtual Edition (SRS VE) and Hyper-V	• **Server** — VMware ESX 5.0 or later or Windows Hyper-V environment on Windows 2008 R2 or Windows 2012 • **Processor** — One or more processors, each 2.2 GHz minimum, must be SSE2 supported (required for FIPS compliance) • **Free Memory** — Minimum: 4 GB Recommended: 8GB • **Free Disk Space** — Minimum disk space required for your SRSv3 appliance is 64 GB • **CPU** — Minimum: One vCPU, 2.0GHz or higher, 64-bit Recommended: Two vCPU, 2.0GHz or higher, 64-bit • **Browser** — Internet Explorer 9 +, Mozilla Firefox, or Google Chrome • 250 device support is applicable for CloudIQ-enabled customers. **Notice:** The 3.38 VE can be configured to support a maximum of 250 devices. CloudIQ-enabled customers are recommended to utilize 2 CPUs during VE configuration.	SRS	• Default is one vCPU, but you have the option to add additional vCPU before SRS is powered up. • SRS requires a site-supplied ESX or Windows server. • Two SRS Virtual Edition servers deployed on a separate ESX servers/Hyper-V servers are required for a High Availability configuration. • One SRS Virtual Edition or SRS Virtual Edition High Availability Cluster can support up to 250 devices. • Do not place VMware/Hyper-V images or storage files on Dell EMC devices managed by the SRS Client. • When running clustered HA Clients on VMware/Hyper-V, each Gateway Client must be located on different physical hardware. • Collocation of a Policy Manager on the SRS Host is not supported or permitted. The underlying SUSE operating system is customized for the SRS and does not have the necessary libraries. • The preferred method of deploying SRS is through VMware vCenter. If the user does not have VMware vCenter, then see KB Article 529262 - SRS: How to deploy SRS VE 3.26+ without vCenter https://support.emc.com/kb/529262.
SRS Docker Edition (SRS DE)	• Docker supported Linux distribution (x64 bit) • Docker engine (Docker runtime installed): https://docs.docker.com/engine/installation/ • **Processor** — One or more processors, each 2.2 GHz minimum, must be SSE2 supported (required for FIPS compliance) • **Free Memory** — Minimum: 4 GB Recommended: 8GB • **Free Disk Space** — 64 GB or higher • **Ports** — FTP 21 | HTTPS 443 | SMTP 25 | Provision, WebUI & REST 9443 • **CPU** — Minimum: One vCPU, 2.0GHz or higher, 64-bit Recommended: Two vCPU, 2.0GHz or higher, 64-bit • **Browser** — Internet Explorer 9 +, Mozilla Firefox, or Google Chrome • 250 device support is applicable for CloudIQ-enabled customers. **Notice:** The 3.38 VE can be configured to support a maximum of 250 devices. CloudIQ-enabled customers are recommended to utilize 2 CPUs during VE configuration.	SRS	

CHAPTER 2
Installing

This chapter provides the information that you will need to prepare the SRS server for the installation of SRS. Topics include:

- Overview 14
- Configuring SRS on Linux host using Docker Engine (SRS DE) 14
- Configuring Operating System for VM (SRS VE) 17

Overview

Apart from the SRS backend system, there is an SRS Gateway that is installed on the customer site either on the product itself (embedded SRS Device Client), on a separate physical/virtual machine, or as a binary installer for Linux.

Install options

There are two install options for SRS:

- SRS Docker Edition (SRS DE)
  - Can be run on a qualified Linux environment that supports Docker containers

    Note: Cloud platform support for the SRS Docker Edition is best effort. Passive FTP is not supported with SRS DE.

- SRS Virtual Edition (SRS VE)
  - SRS can be run 100% virtually
  - No additional hardware required
  - No additional OS licenses required

The following section describes the binary install for SRS on a Linux host.

Configuring SRS on Linux host using Docker Engine (SRS DE)

Prerequisites

To install the SRS Docker on a Linux host, SRS requires that specific assigned ports (see Port Requirements section below) on the system be available. If the prerequisites are not provided, then the SRS application installer aborts the installation.

System Requirements

Before installing SRS on a Linux host, the following must already be installed:

- Docker supported Linux distribution (x64 bit)
- Docker Engine (Docker runtime)

Using the binary installer, SRS can be installed on the Linux distributions that support Docker. For a list of Linux distributions that are supported by Docker and for Docker installation instructions, refer to the following address: https://docs.docker.com/engine/installation/.

Note: The Docker Engine is supported on many Linux distributions (such as RHEL, CentOS, OpenSUSE, and SUSE Linux Enterprise), for example, the following is the link for a Docker installation on Red Hat Enterprise Linux (RHEL): https://docs.docker.com/engine/installation/linux/rhel/.

Port Requirements

SRS runs its services on the following ports:

Table 2 Port Requirements

Services	Ports
Connect Home support (legacy) - FTP	21
Connect Home support (legacy) - HTTPS	443
Connect Home support (legacy) - SMTP	25
provision, WebUI, RESTful services (such as device management, RESTful Connect Home, MFT, keepalive, etc.)	9443

SRS Installation Instructions

The SRS installer performs the required prerequisite checks. In effect, it validates the system requirements, Docker runtime, and the specified port availability.

To install SRS:

1. Download the latest SRS Docker Edition (SRS DE) for Linux on Dell EMC Online Support and copy to the Linux server running Docker:

   https://support.emc.com

2. To change the permission of the installer, use the following chmod command example:

   ```
   chmod +x esrsde-3.xx.00.01.bin
   ```

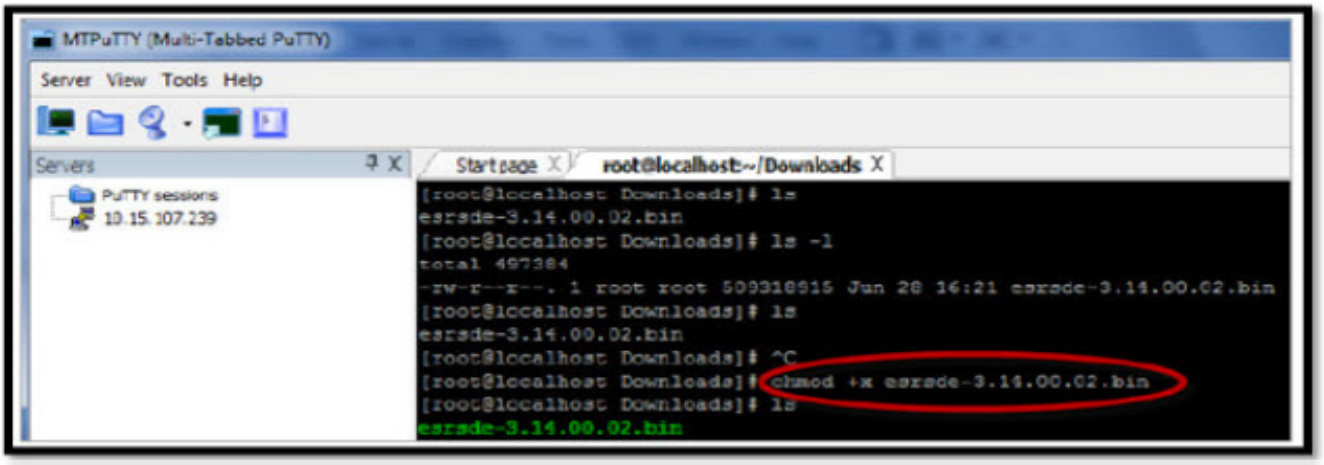

Figure 1 chmod command

3. Run the installer using the following command example:

   ```
   ./esrsde-3.xx.00.01.bin --install
   ```

   The command will check the following prerequisites, and proceed with installation:

   - Disk space availability, must be at least 64 GB
   - Docker runtime
   - Ports 21, 25, 443, 9443, and 8118 are free

- IP address is valid

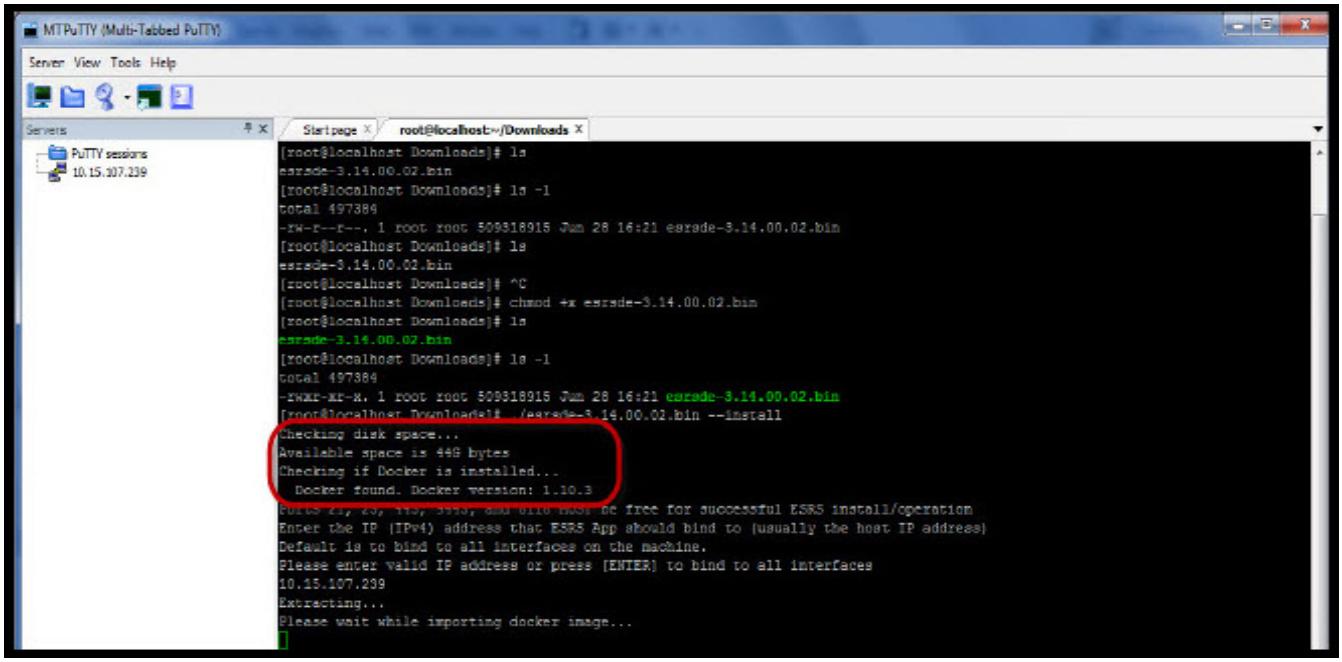

Figure 2 Checking prerequisites

4. Follow the instructions on the prompt to complete the installation.

   During the installation, the installer will request a password to be set for the root account of SRS, as shown in the following figure.

   Note: This is **not** the root account of the host.

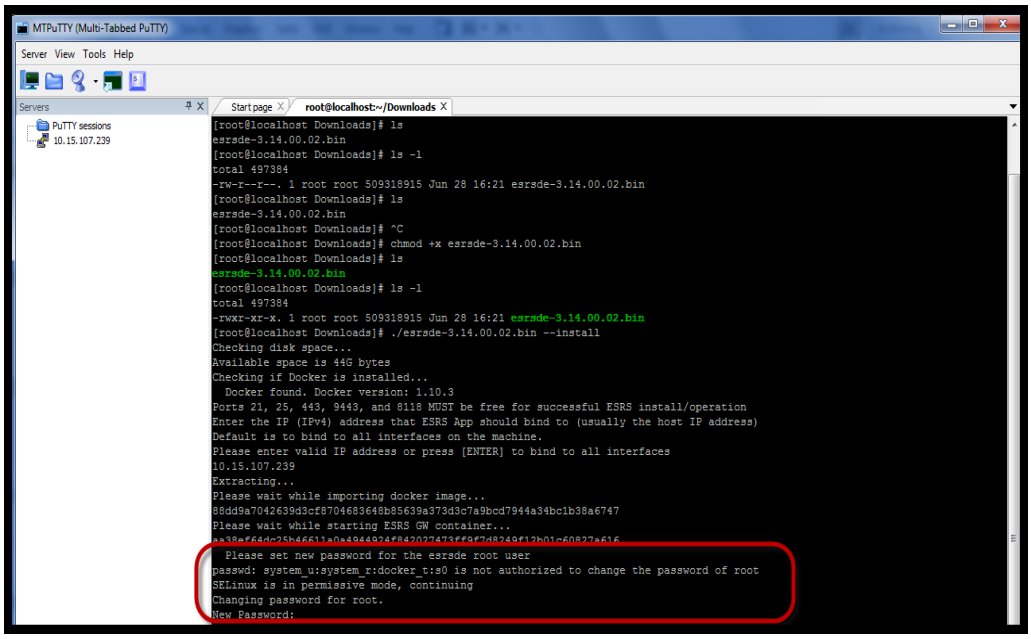

Figure 3 Setting the root password

At the end of a successful installation, the installer displays a message stating that the SRS services are up and running and provides the URL for you to provision SRS, as shown in the following figure.

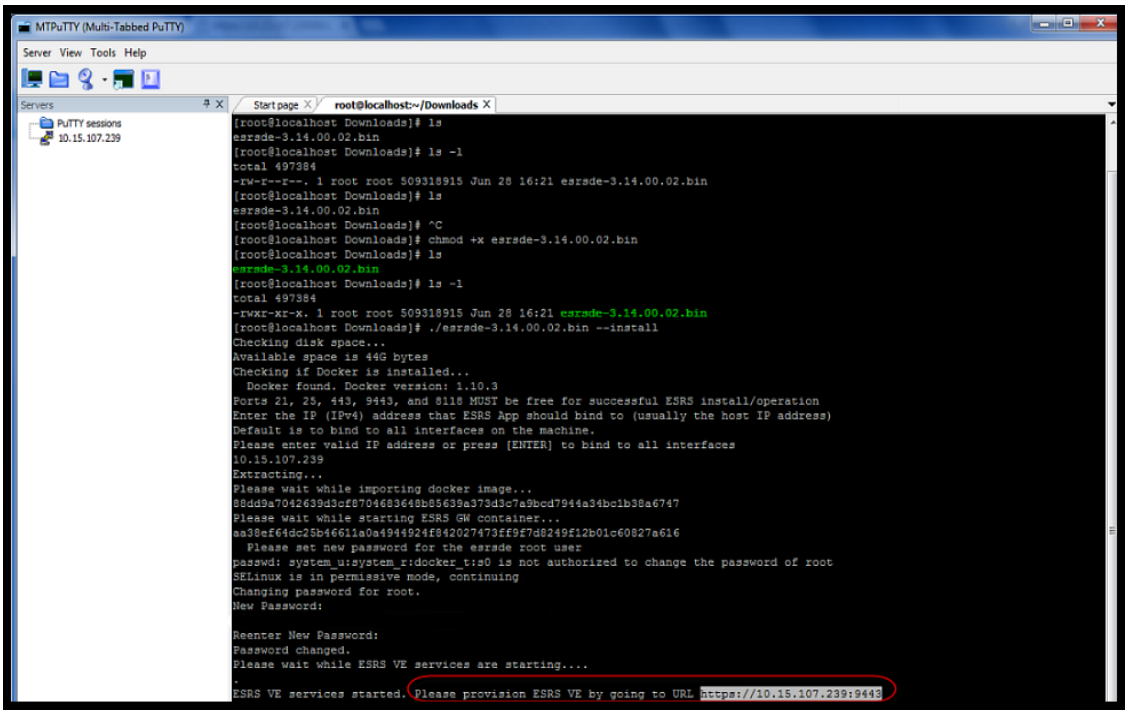

Figure 4 Sample image of successful installation

5. After you copy and paste the URL to a Web browser, follow the steps starting at the "Root logon and Admin setup" section in Chapter 3.

Configuring Operating System for VM (SRS VE)

Configure Network

The following are needed to set up SRS:

- IP address
- Default gateway
- DNS server

The following are optional:

- Customer proxy server
- SRS Policy Manager (strongly recommended)
- Mail server - if you would like notifications and/or Connect Home failover

Note the following:

- Do not change any elements (for example, firewall settings) of SRS, according to customer security policies.
- Do not place VMware/Hyper-V images or storage files on Dell EMC devices managed by SRS.

- When running clustered HA SRS Virtual Edition Clients on VMware /Hyper-V, each SRS Virtual Edition Client must be located on a different physical ESX server.

First boot installation

Before you can access the SRS Virtual Edition Web UI, you must perform a first boot installation.

This section provides the steps to install and configure SRS and to boot it through the ESX Server/HYPERV.

Requirements

Before you begin, the following conditions must be met:

- The SRS Virtual Edition software package has been downloaded by the customer and is available for installation

  Note: The version downloaded **must** match the virtual environment to be used.

- Enterprise level:
  - Hypervisor is available at the customer site
  - VMware or Hyper-V is available
- Customer must create a VM and install the OS.

To configure the SRS during first boot, follow the steps in the following sections.

Downloading the vSphere Client and deploying the SRS image

To download the vSphere Client and deploy the SRS image:

1. Access the vSphere Client and select **File > Deploy OVF Template...**, as shown in Figure 5 on page 18. The Deploy OVF Template - Source wizard appears.

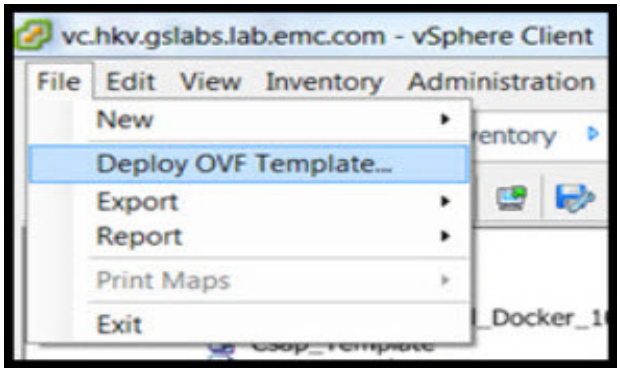

Figure 5 Deploy OVF Template

2. In the Deploy OVF Template - Source wizard, use the **Browse...** button to select the desired URL to download and install the OVF package, as shown in Figure 6 on page 19, and then click **Next**. The OVF Template Details window appears.

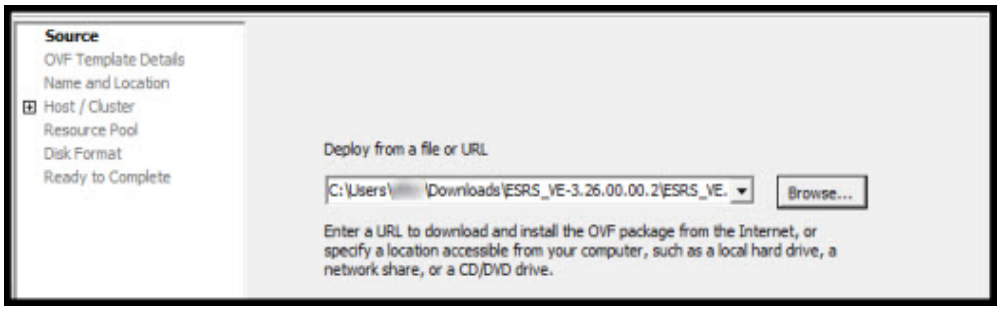

Figure 6 Deploy from a file or URL

3. In the **OVF Template Details** window, verify the details and then click **Next** to continue, as shown in Figure 7 on page 19. The **End User License Agreement** window appears.

Figure 7 OVF Template Details

4. In the **End User License Agreement** (EULA) window, read the license in its entirety, and then click **Accept**. The **Name and Location** window appears.

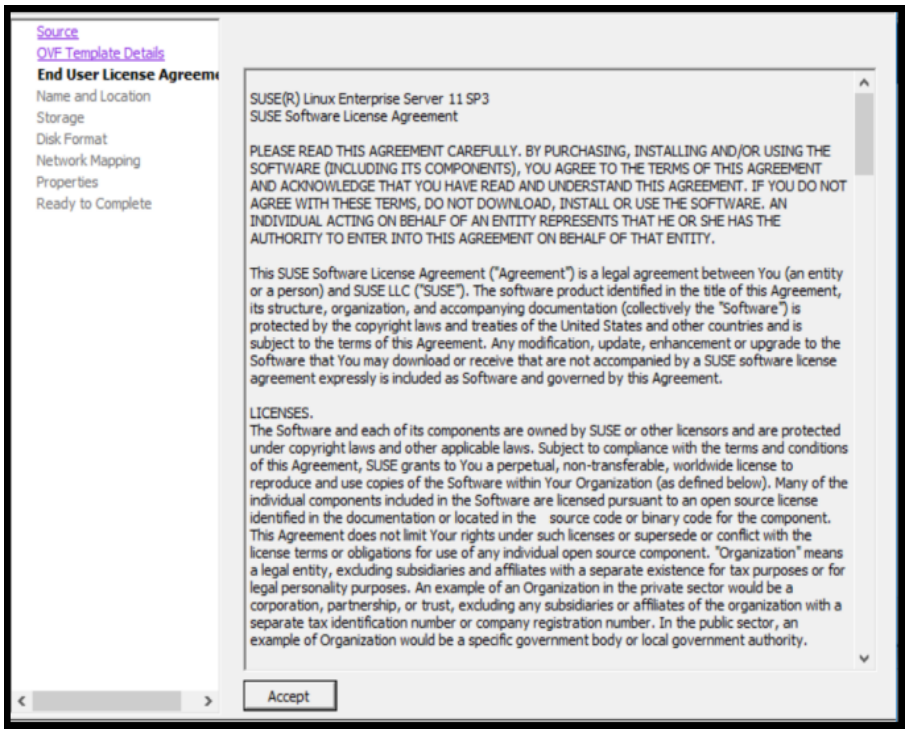

Figure 8 Eula screen

5. In the **Name and Location** window, enter a unique name and a location for the deployed template, as shown in Figure 9 on page 20, and then click **Next**. The **Host/Cluster** window appears.

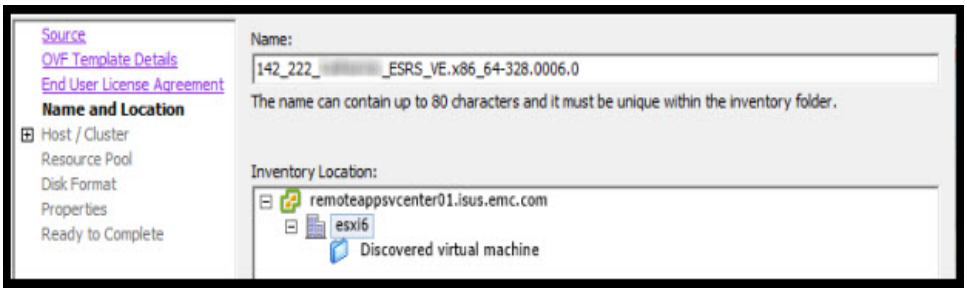

Figure 9 Name and Location

6. In the **Host/Cluster** window, select a host or cluster to run the deployed template, and then click **Next**. The **Specific Host** window appears.

Figure 10 Host / Cluster

7. In the **Specific Host** window, choose a specific host within the cluster, and then click **Next**. The **Storag**e window appears.

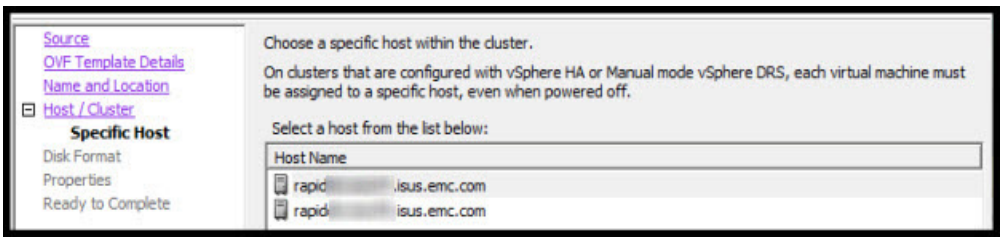

Figure 11 Specific Host

8. In the **Storage** window, select the destination storage for your vm files, and then click **Next**. The **Disk Format** window appears.

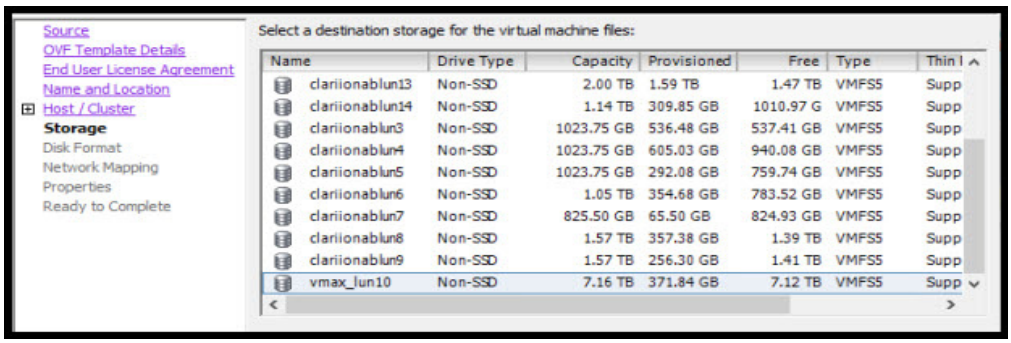

Figure 12 Storage

9. In the **Disk Format** window, select **Thin Provision**, and then click **Next**.

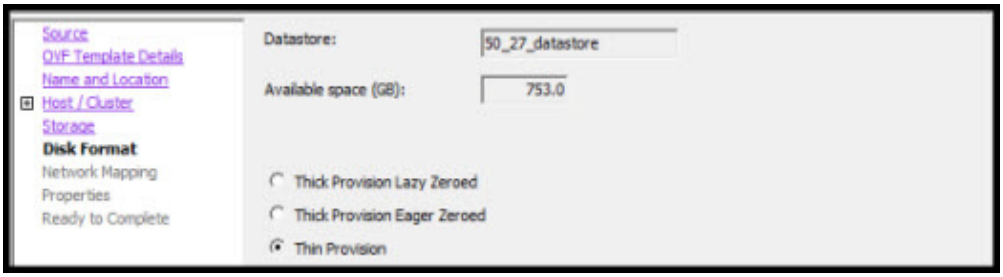

Figure 13 Disk Format

10. In the **Network Mapping** window, select the network the deployed template should use, and then click **Next**.

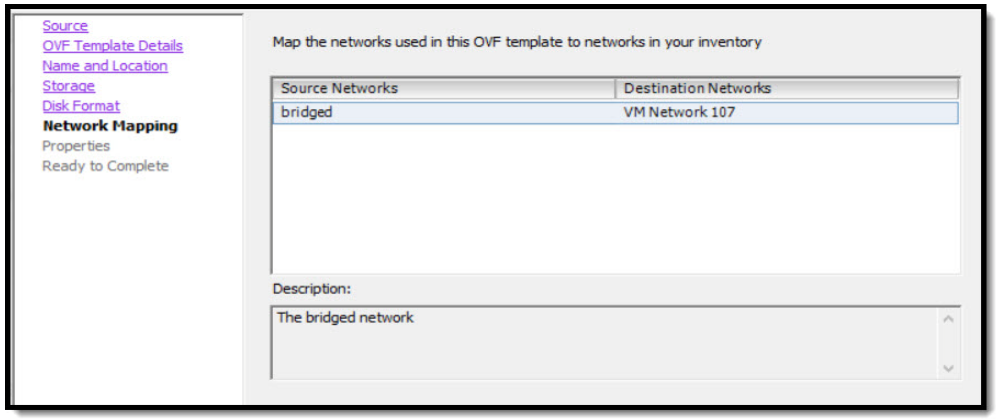

Figure 14 Network Mapping

11. In the **Properties** window, enter details for the following fields, and then click **Next**:

⚠CAUTION

Please enter complete information in this template to enable easy provisioning of SRS VE. If any detail is incomplete or incorrect, it can only be corrected using YAST or you will be required to re-enter all the required information in the OVF template.

- DNS1
- DNS2
- Hostname
- Default Gateway
- Network IPV4 address
- Network IPV4 Netmask

Note: IPV4 address is mandatory and IPV6 is optional.

Note: IPV6 connection only applies to SRS Virtual Edition (SRS VE). It is not supported on Hyper-V, SRS Docker Edition (SRS DE), and SRS Embedded Virtual Edition (SRS eVE).

- Network IPV6 address
- Network IPV6 Netmask
- Time Zone Setting
- NTP Server address
- Root Password

NOTICE

A root Password should be set during deployment. For security reasons, it is recommended to use a password that is a minimum of eight characters and contains a minimum of one upper, one lower, one digit, and one special character.

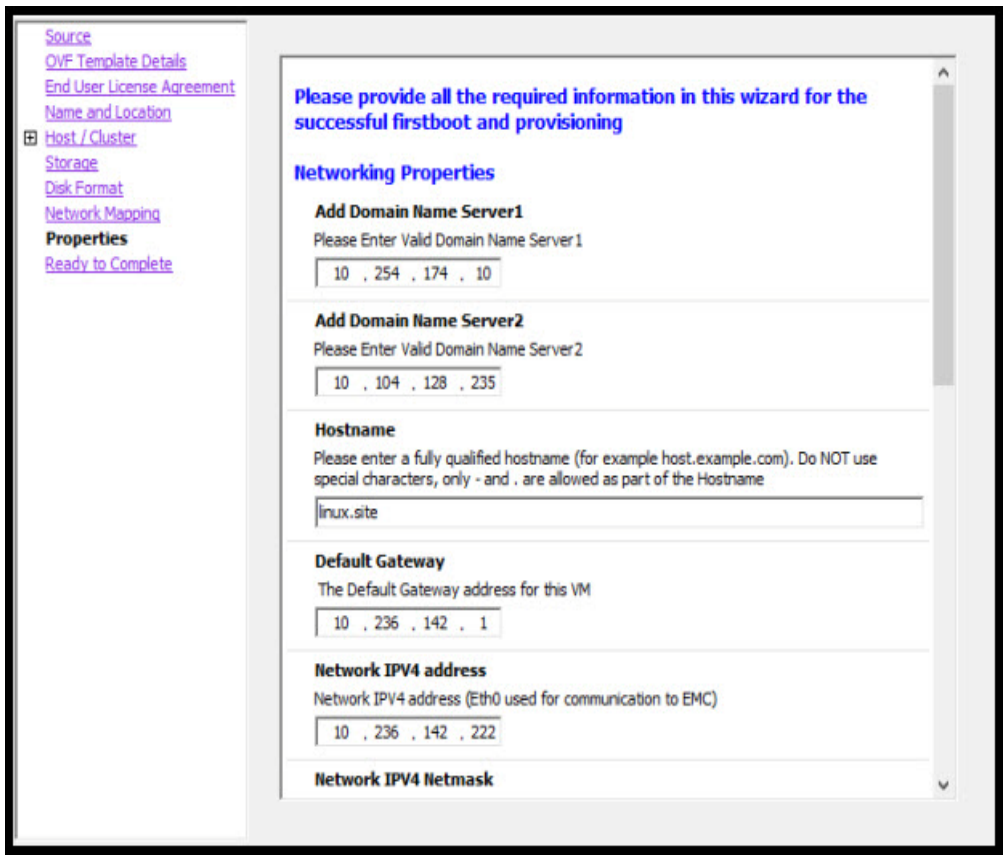

Figure 15 Properties

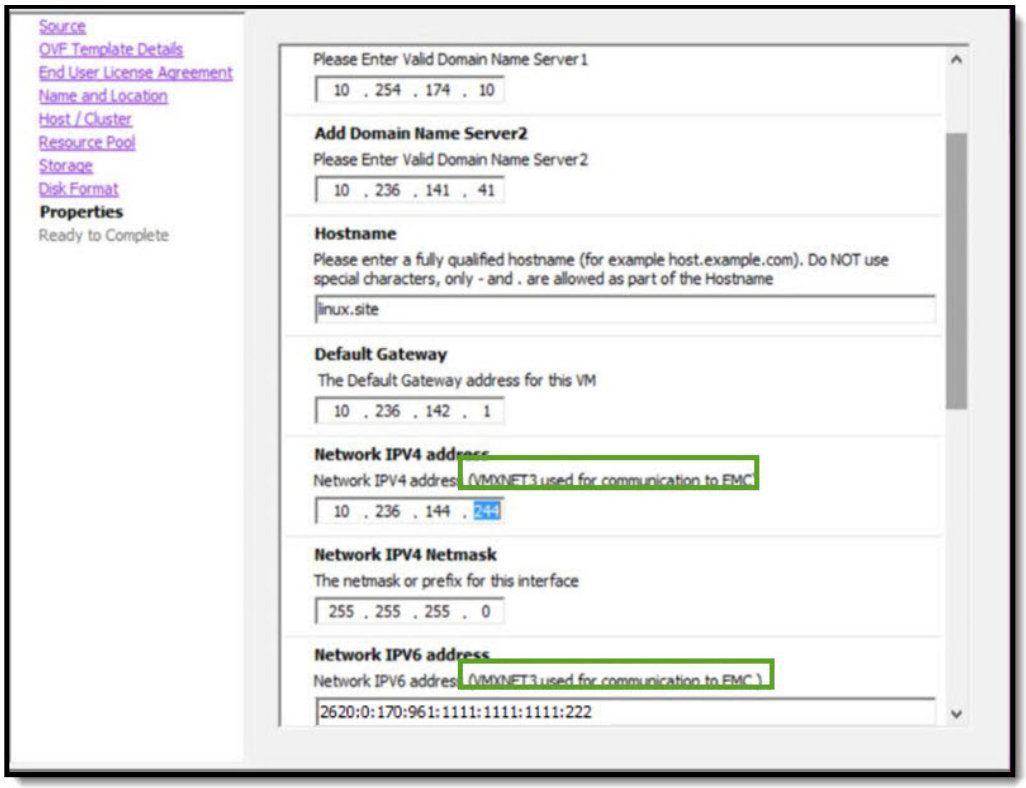

Figure 15 (continued)

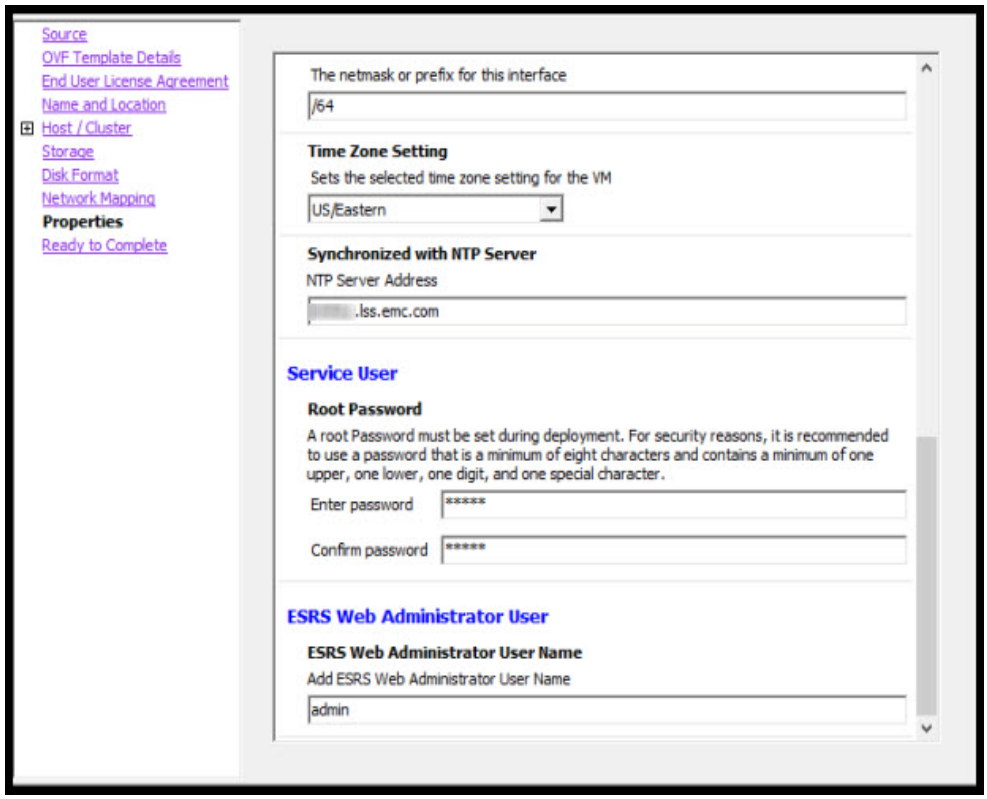

Figure 15 (continued)

12. In the **Ready to Complete** window, review your options, and then click **Finish**. The **deployment status** window appears, as shown in Figure 17 on page 26. When the deployment is completed successfully, a deployment completed successfully message appears.

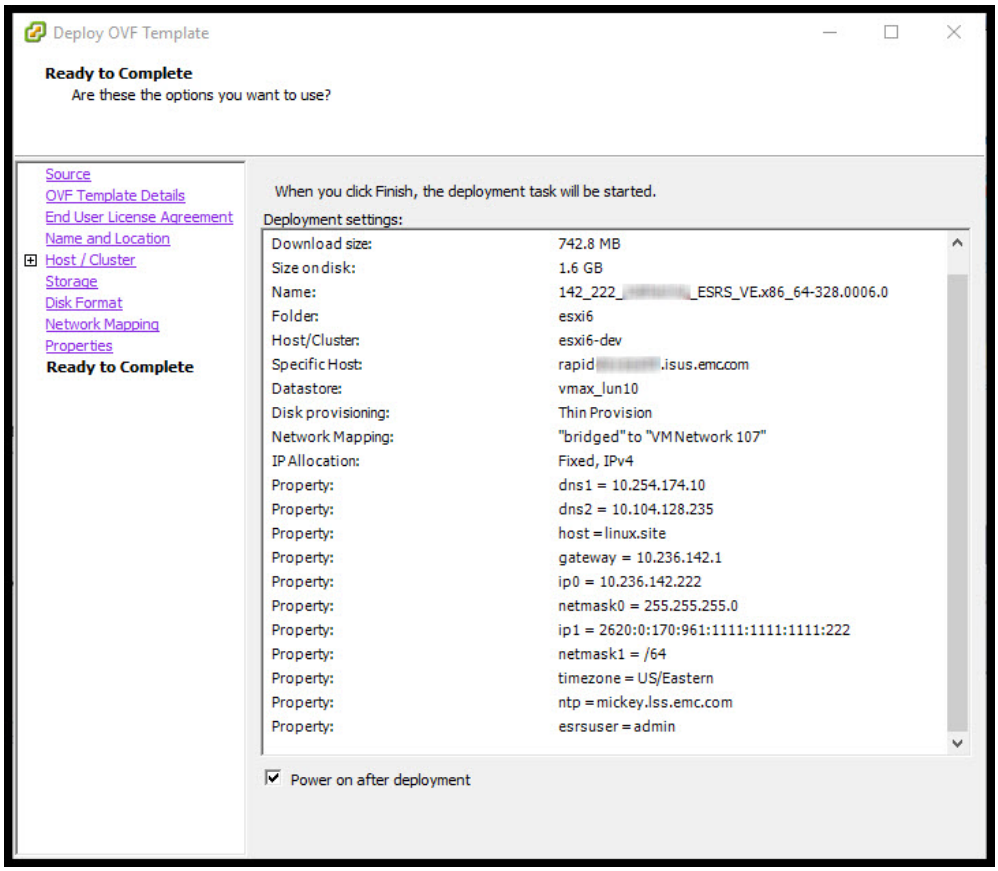

Figure 16 Ready to Complete

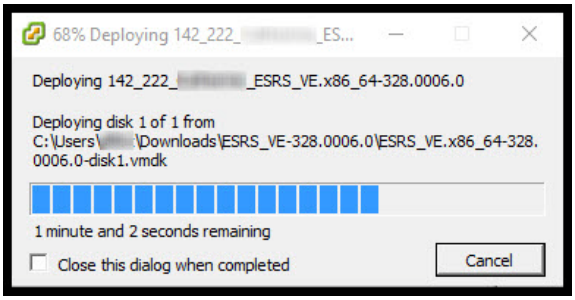

Figure 17 Deploying SRS

13. In the **Deployment Completed Successfully** window, click **Close**, as shown in Figure 18 on page 27.

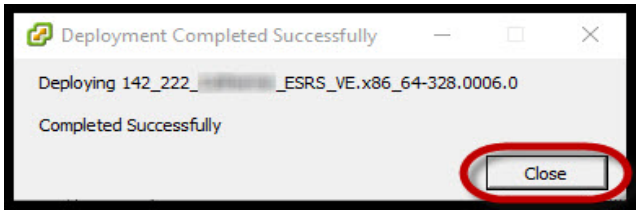

Figure 18 Completed Successfully message

Powering on the virtual machine

To navigate through the Linux console:

1. In the vSphere Client, ensure that your deployed template is selected in the left pane directory, and then click **Power on the virtual machine** in the **Getting Started** tab if you did not select that option during deployment., as shown in Figure 19 on page 27.

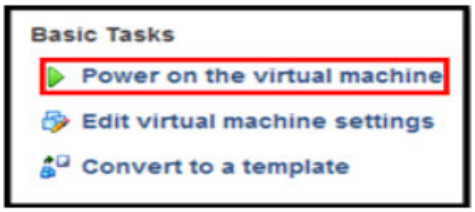

Figure 19 Powering on the virtual machine

2. If applicable, go to the Hyper-V Appendix and follow the instructions listed. Then go to the following step.
3. When the VE is powered on, wait until you see that the first boot is completed. Then go to the SRS Web UI by using the IP address that is displayed in the configuration verification screen, as outlined in red on the screen example below.

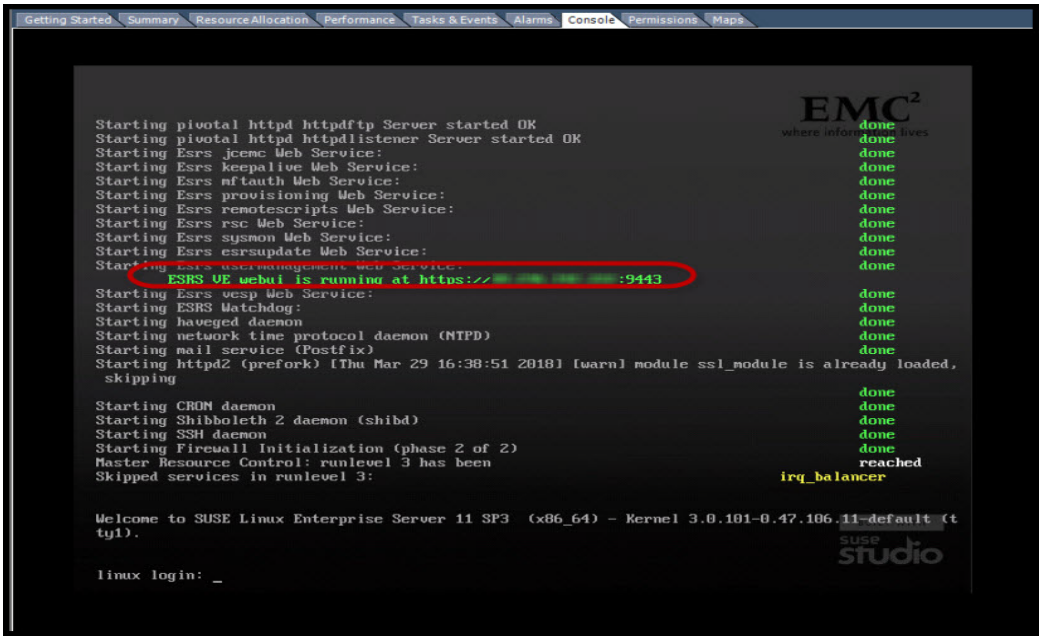

Figure 20 Configuration verification

Note: The failed services shown in red are expected at this time as some of the services have **not** been configured. This issue is addressed in the next section.

Note: The IP address of the SRS should display in the **SRS VE webui is running at https://<SRSve-ip>:9443** field. If it displays anything different, then the network setup is not correct. This can be addressed by logging on to the SRS shell and using YaST2 to correct the network configuration. See Appendix B of the SRS Operations Guide for details.

Note: It is recommended that before you launch the Web UI portion of the SRS install, you log on to the shell and verify the network, DNS, and default gateway configurations and connectivity. You can use the CECT to perform these tests. If there are issues with the configuration, then use YaST2 to correct them. See Appendix B of the SRS Operations Guide for details.

CHAPTER 3
Provisioning

This chapter provides the information that you will need to prepare the SRS server for the provisioning of SRS. Topics include:

- Root logon and Admin setup 30
- Provisioning screens/SRS setup 34

Root logon and Admin setup

The root logon and Admin setup described in this section are only a one-time setup, which is performed after a successful first boot configuration.

To initially log on to the SRS Web UI after a first boot:

1. Access the SRS Web UI using the following URL, either in **Internet Explorer 9 (IE9) or later**, **Google Chrome**, or **Mozilla Firefox** web browsers:

   https://<SRSve-ip>:9443/

   The SRSv3 home page displays.

2. On the SRSv3 home page, on the menu bar on the upper-right corner, click **Login**. The Root Login page appears.

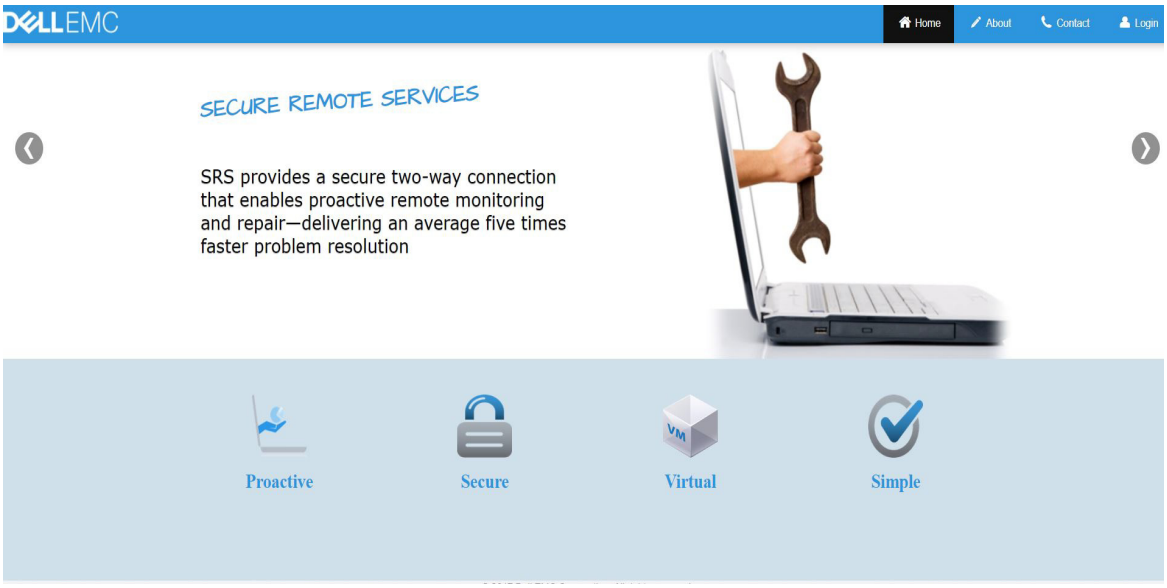

Figure 21 SRSv3 home page

Note: The Root Login page, as shown in Figure 22 on page 31, only appears the first time you log on to SRS, after a successful first boot configuration. Also, when you initially provision SRS, the version being installed displays in the upper-left corner, after the word **ESRS Virtual Edition.**

3. On the Root Login page, in the **User Name** text box, enter **root** as the user name, as shown in Figure 22 on page 31.

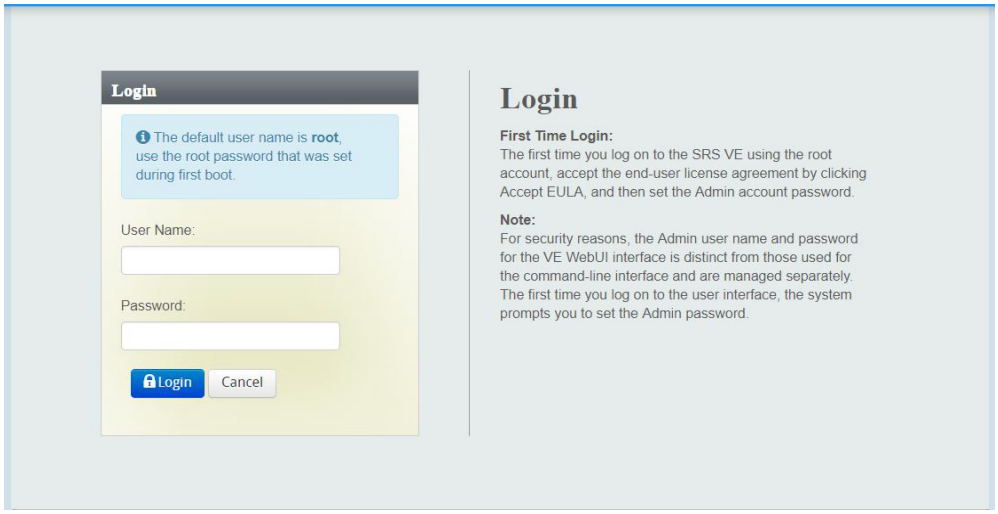

Figure 22 Login page

4. In the **Password** text box, enter the root password that you set during the first boot installation.

IMPORTANT

If you forget your root password, not your Admin password, then you must perform the first boot installation again to set up a new root password. The system can not retrieve your root password. To reset your SRS Version 3 (SRSv3) Web UI Admin password using the Web UI, see Chapter 5, "Troubleshooting," in the Operations Guide for resetting the SRS Web UI user password.

5. Click **Login**. The EULA license agreement page appears.

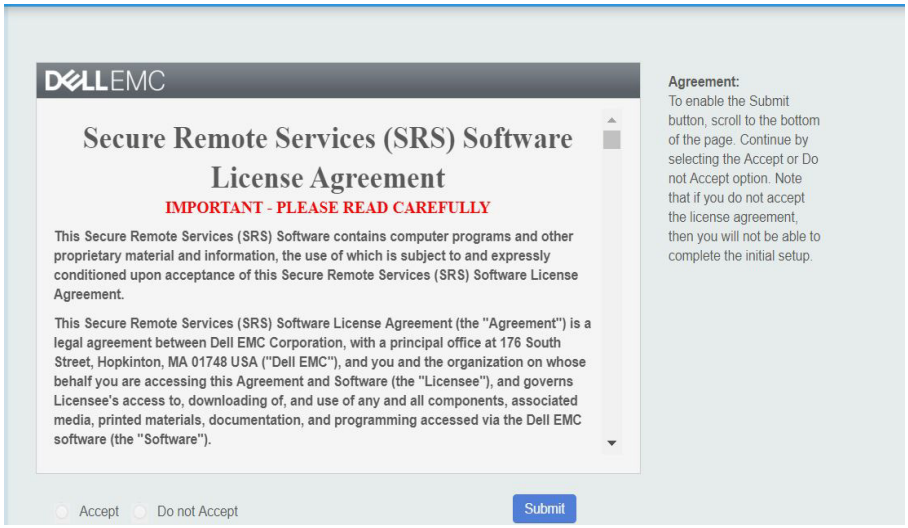

Figure 23 EULA page

6. Scroll down to read the agreement in its entirety. Accept the end-user license agreement by selecting the **Accept** option.

   Note: You will not be able to select the **Accept** or **Do not Accept** radio button unless you scroll to the bottom of the page.

7. After accepting the agreement, click **Submit**. The Admin setup page appears. Note that the first time you log on to the user interface, the system prompts you to set the Admin password.
8. In the Admin setup page, set the Admin password, and then click **Log on as admin**, as shown in Figure 24 on page 32. Note the following:
   - There is no default password for the Admin user, therefore, you need to manually set the password when prompted.
   - If the Admin password is not changed within 15 minutes, then you will be logged out and will have to start from the beginning by logging on with your root credentials.
   - The password must meet the following requirements:
     - Be 8 or more characters in length, with a maximum of 16 characters.
     - Contain at least one numeric character.
     - Contain at least one uppercase and one lowercase character.
     - Contain at least one special character such as ‘ ~ ! @ # $ % ^ & * ( ) - _ = + [ ] { } ; < >
     - Be a password that does not match the previous password.
     - Do **not** use special characters ‘ (single quote) and “ (double quotes) as part of the password.
     - Do **not** use special characters / ? : , . | \
     - May **not** be a password that matches the previous password.
   - If all of the password requirements are met, then after clicking the **Log on as admin** button, you will be logged out as root and logged in as Admin with SRS Admin rights.

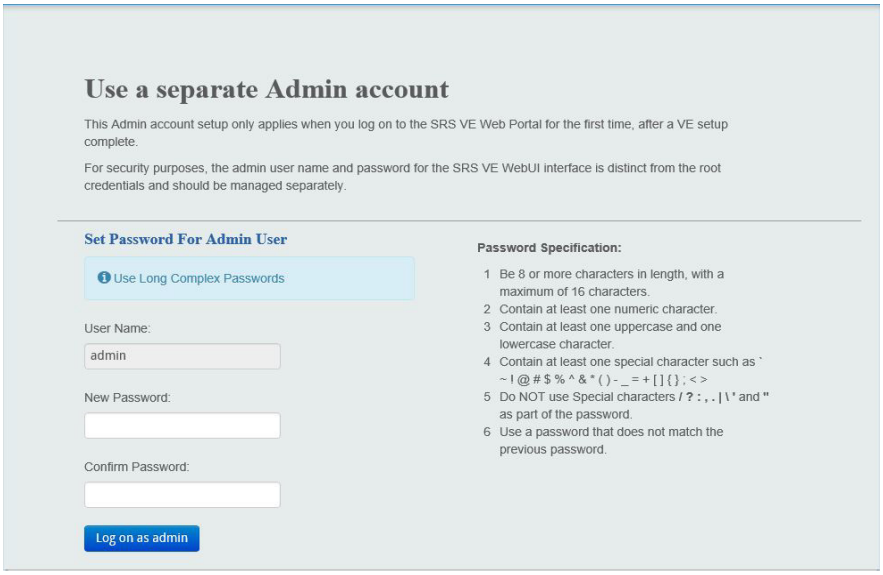

Figure 24 Admin account setup

IMPORTANT

If you lose or forget your Admin password for the SRS Web user interface (or the user name defined during the first boot configuration), then see Chapter 5, "Troubleshooting," in the Operations Guide for resetting the SRS Web UI user password. This requires access to the SRS Shell with an SSH client.

9. Go to the "Provisioning screens/SRS setup" on page 34, and follow the steps listed.

Provisioning screens/SRS setup

Registration

To register for SRS:

1. In the Primary Contact page, enter the primary contact information, as shown in Figure 25 on page 34. Dell EMC uses the information provided in this section as the customer contact for SRS. Dell EMC will reach the primary contact first regarding any SRSv3 queries.

   IMPORTANT

   This information is required to proceed with the SRS configuration. Ensure that this information is accurate as it may have a direct impact on the SRS support.

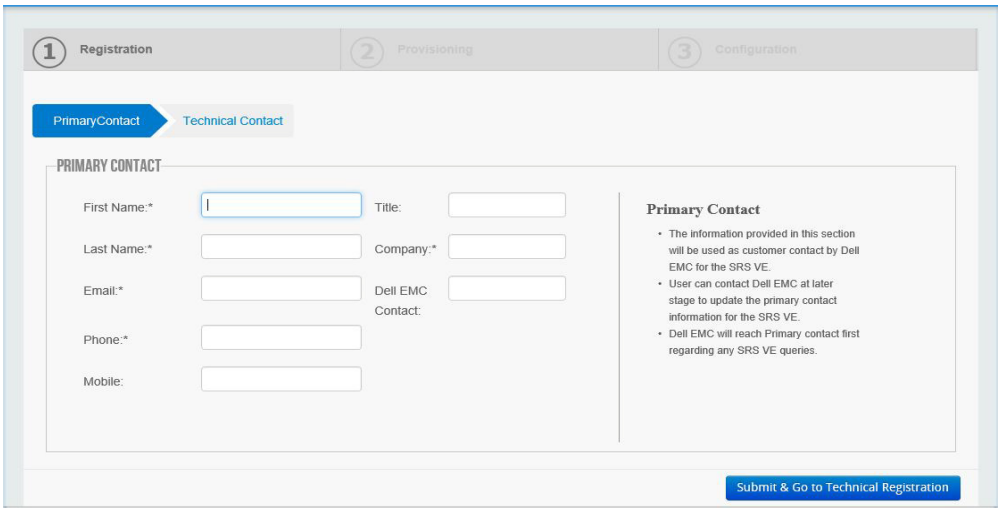

Figure 25 Primary Contact page

2. When the primary contact information is completed, click the **Submit & Go to Technical Registration** button. A status message displays stating that the primary contact has been saved. This contact information will be used by Dell EMC in the event of any connectivity issues with SRS.
3. In the status message window, click **OK**. The message closes and the Technical Contact page appears.

4. In the Technical Contact page, as shown in Figure 26 on page 35, enter the additional contact information. For any SRSv3 queries, if the primary contact is not available, then Dell EMC uses the technical contact information.

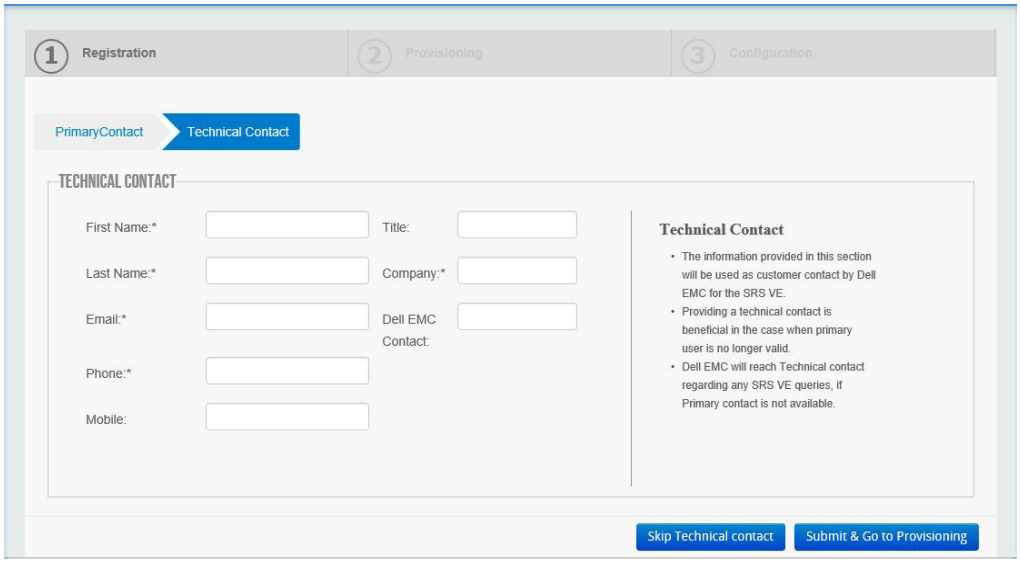

Figure 26 Technical Contact page

You can skip this step by clicking the **Skip Technical contact** button. The **Provisioning** tab displays with the Proxy Server, Network Check, and Provision sub tabs.

Note: Although this information is optional, Dell EMC highly recommends that you provide it. This should be your secondary contact for SRS. Ensure that this information is accurate as it may have a direct impact on SRS support.

---

5. After you enter the technical contact information, click **Submit & Go to Provisioning**. A status message appears stating that the technical contact has been saved.
6. Click **OK**. The Provisioning tab appears with the Proxy Server, Network Check, and Provision sub tabs.
7. For the **Proxy Server** sub tab, if a proxy server is **not** required, then you can skip this step. If you need to provision the SRS with a proxy server, then follow these steps:
   1. In the **Proxy Server** tab, select the **Enable Proxy between Client and EMC** checkbox and enter the required details, as shown in Figure 27 on page 36.

2. If your proxy server requires credentials, then select the **Authenticate using the following information** checkbox and complete the applicable details, as shown in Figure 27 on page 36.

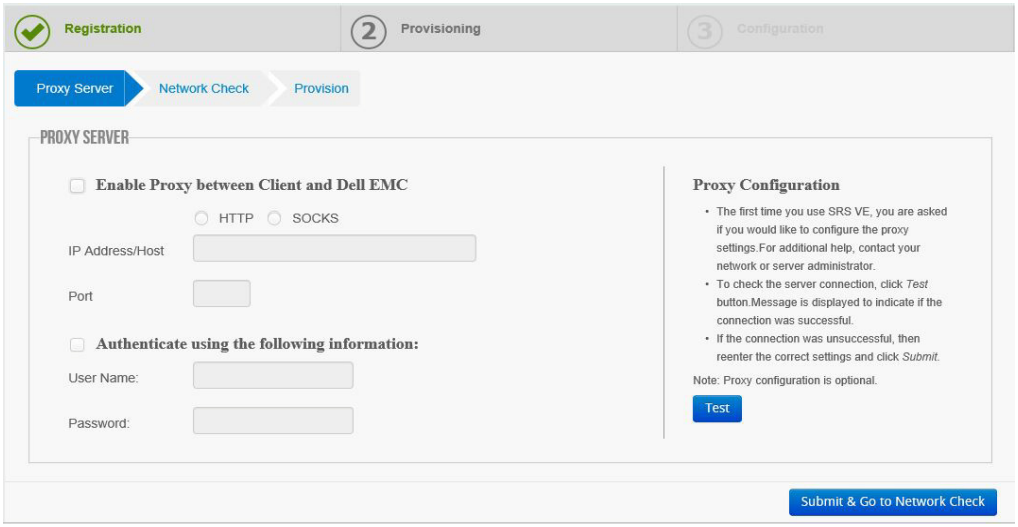

Figure 27 Proxy server tab

3. Click **Test** to test the connectivity through the proxy to Dell EMC enterprise. A message displaying the result appears next to the Test button.
4. Click the **Submit & Go to Network Check** button. A message appears stating that the proxy configuration has been saved.
5. Click **OK**. The status message closes and the **Network Check** tab appears.

8. In the **Network Check** tab, you can run network checks to check the connectivity between the SRS UI node, the core node, and the GAS servers.

   To check the network connectivity from SRS to all the required Dell EMC servers, click the **Run Test** button. For Customers, Employees, and Partners, the Run Test button is enabled and the Go to Provision button is disabled by default, as shown in Figure 28.

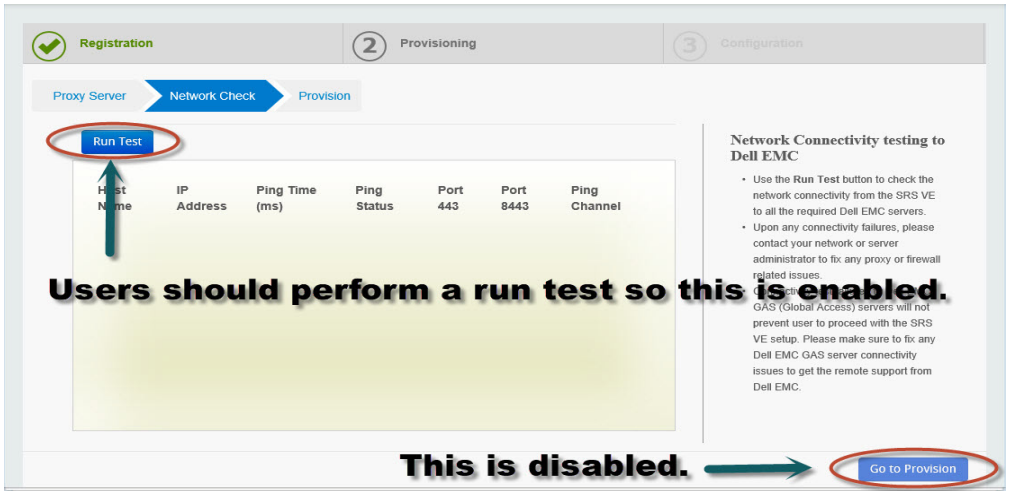

Figure 28 Network Check

1. If any single test fails, including connectivity failures to Dell EMC GAS (Global Access) Servers, then a pop-up message appears stating there is a failure in the network check and the user has an option to proceed with provisioning (despite the network fail) or go back, as shown in Figure 29.

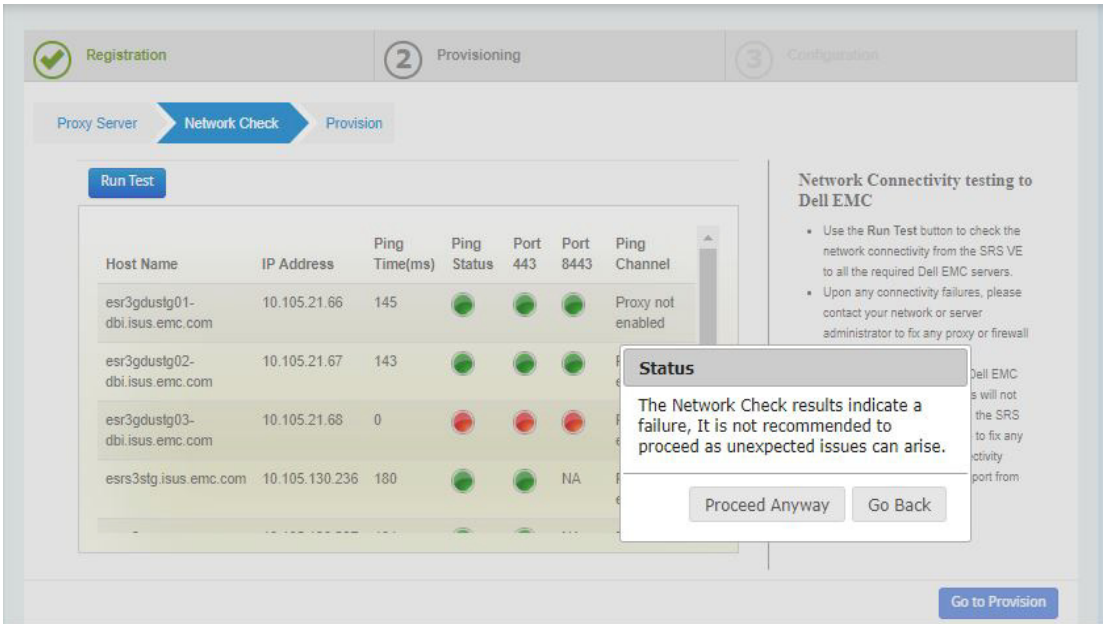

Figure 29 Status popup window

   a. Selecting **Proceed Anyway** will enable the Go to Provision button, as shown in Figure 30. The user can then select **Go to Provision** to continue.

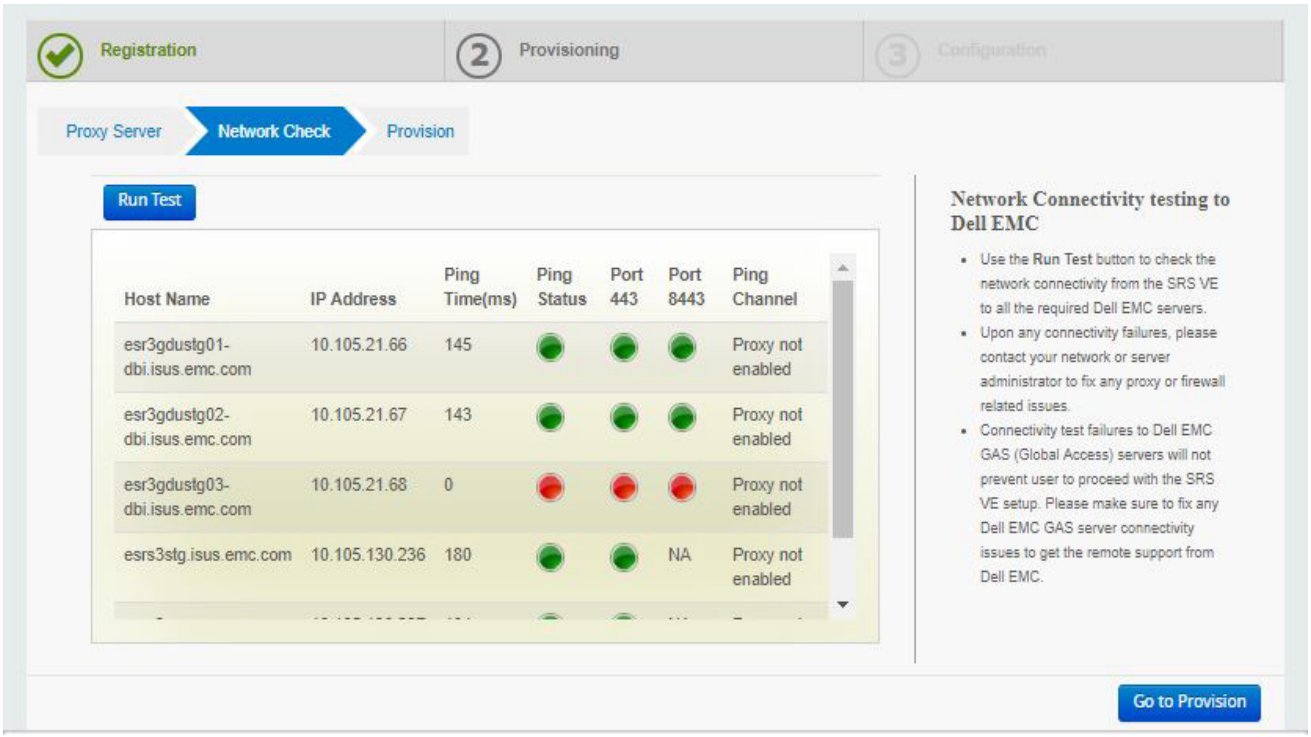

Figure 30 Test Results with **Go to Provision** button enabled

b. Selecting **Go Back** takes the user back to the Test Results page with the Run Test button enabled to run the network check again, as shown in Figure 31. Verify that the appropriate firewall hosts and ports are open to Dell EMC before trying the network check again. Each run test is refreshed.

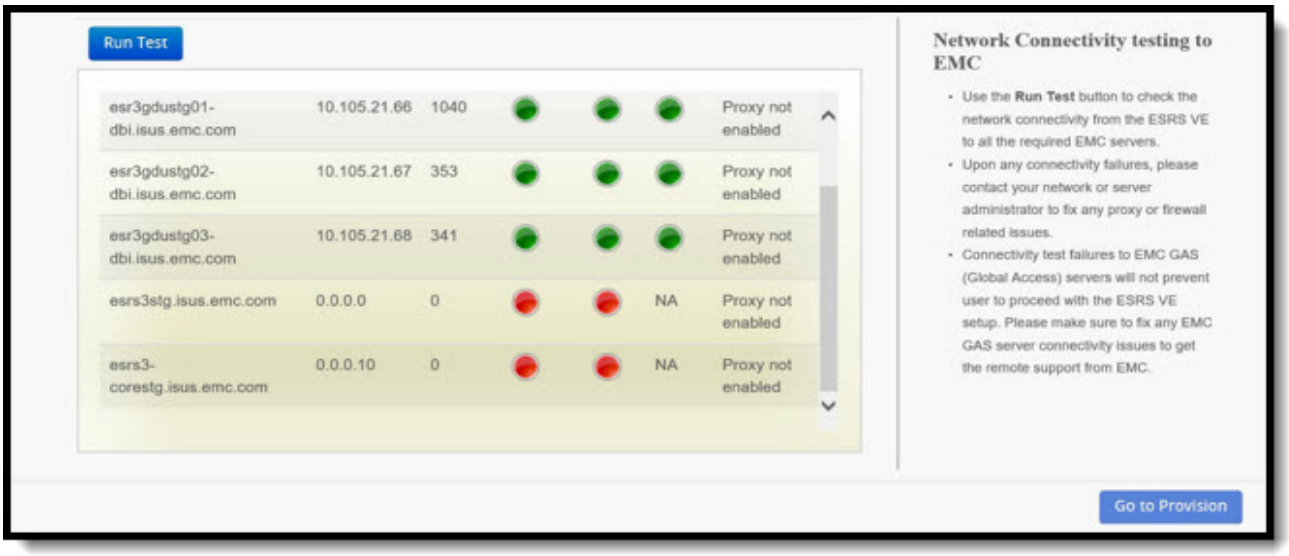

Figure 31 Test Results with **Go to Provision** button disabled

Note: If the tests are successful, then the result shows connected (green circles). If any of the tests are unsuccessful or unable to connect, then the results display unconnected (red circles).

Note: The customer is responsible for the configuration and resolution of the proxy server/firewall issues that impact connectivity to the Dell EMC SRS infrastructure.

IMPORTANT

To ensure communication integrity, proxy servers and devices external to your DMZ must not perform any method of SSL checking on outbound or inbound traffic. SSL checking will cause a loss of connectivity to Dell EMC. If SSL checking is performed on outbound communications by customer firewalls, proxies, Web traffic filtering appliances or applications, web traffic shaping/load balancing, certificate verification or proxying, or Intrusion Detection Services (IDS), then there will be connectivity loss to Dell EMC.

9. Click **Go to Provision**. The **Provision** tab displays.
10. The following classes of users can log on to the **Provision** tab:
    - Partner
    - Employee
    - Customer

11. Partner/employee provisioning log in:

1. Enter your Dell EMC Online Support Credentials in the Provisioning page and then click **Next**.

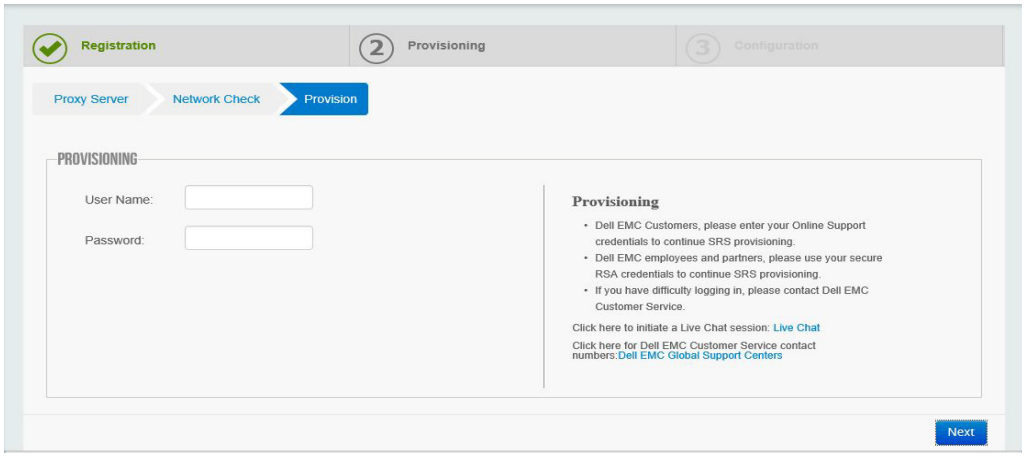

Figure 32 Enter Credentials

2. After you are successfully authenticated under the Provisioning page, the Enter Site ID page opens. Enter your Site ID in the **Site Id** field as shown in Figure 33 on page 39.

Figure 33 Provision Site ID tab

3. Click **Next** to continue. After Dell EMC verifies the Site ID, you are directed to the **Confirmation** page.

4. Verify the information on the Confirmation page and then click **Next** to continue, as shown in Figure 34 on page 40. Provisioning commences, as shown in Figure 35 on page 40.

Figure 34 Confirmation page

Figure 35 Provisioning commences with status indicator

5. When provisioning is done, click **OK** to accept, as shown in Figure 36 on page 40. Your provisioning is complete. Proceed to "Email Configuration" on page 46.

Figure 36 Provisioning completed

12. **Customer provisioning log in:**

    1. Enter your Dell EMC Online Support Credentials in the **Provisioning** page and click **Next**.

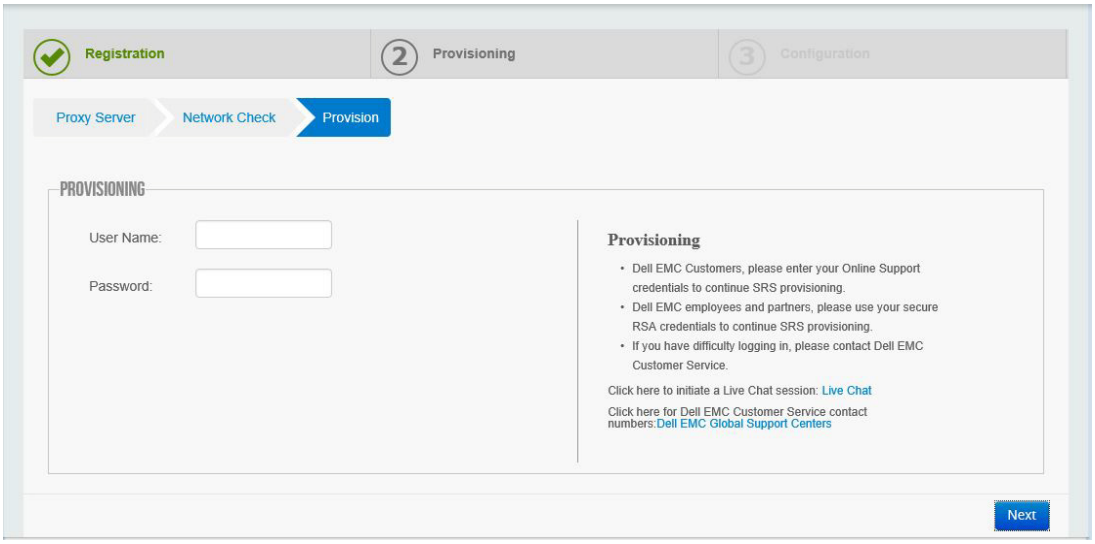

Figure 37 Enter Credentials

    2. In Figure 47, "Customer Provisioning Page" click **Email my access code** to receive an access code.

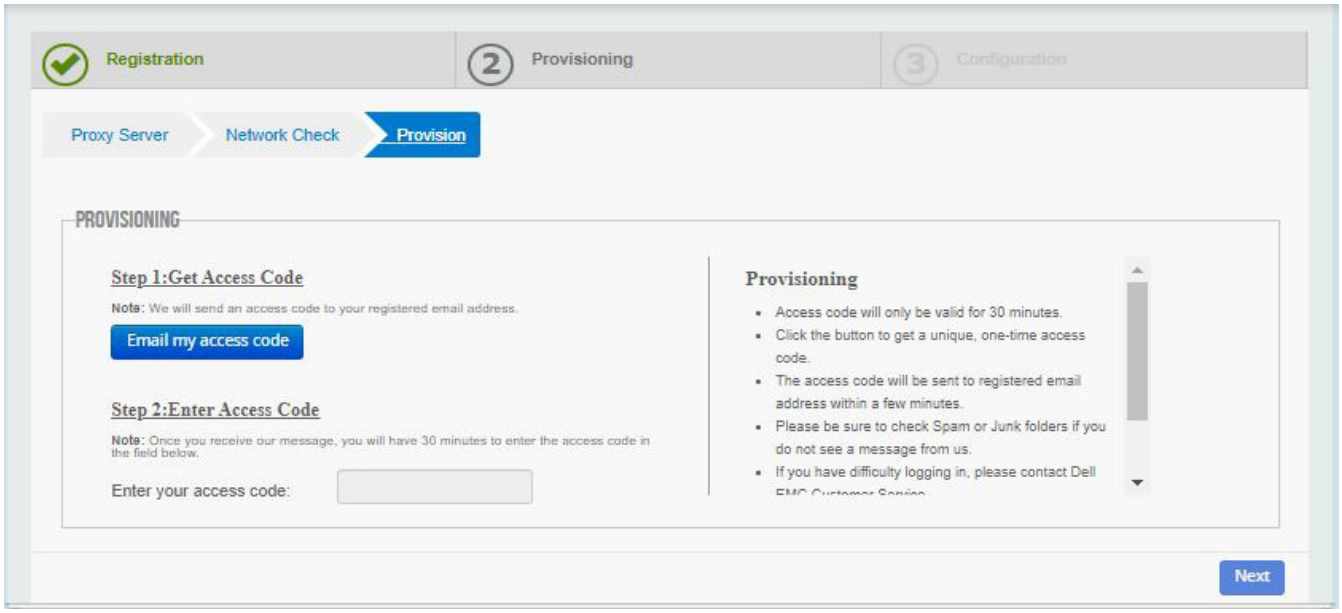

Figure 38 Customer Provisioning Page

3. After a new access code is generated, an email containing the access code is sent, and a **Status** window opens telling you to check your email, as shown in Figure 39 on page 42. Click **OK** to close this window.

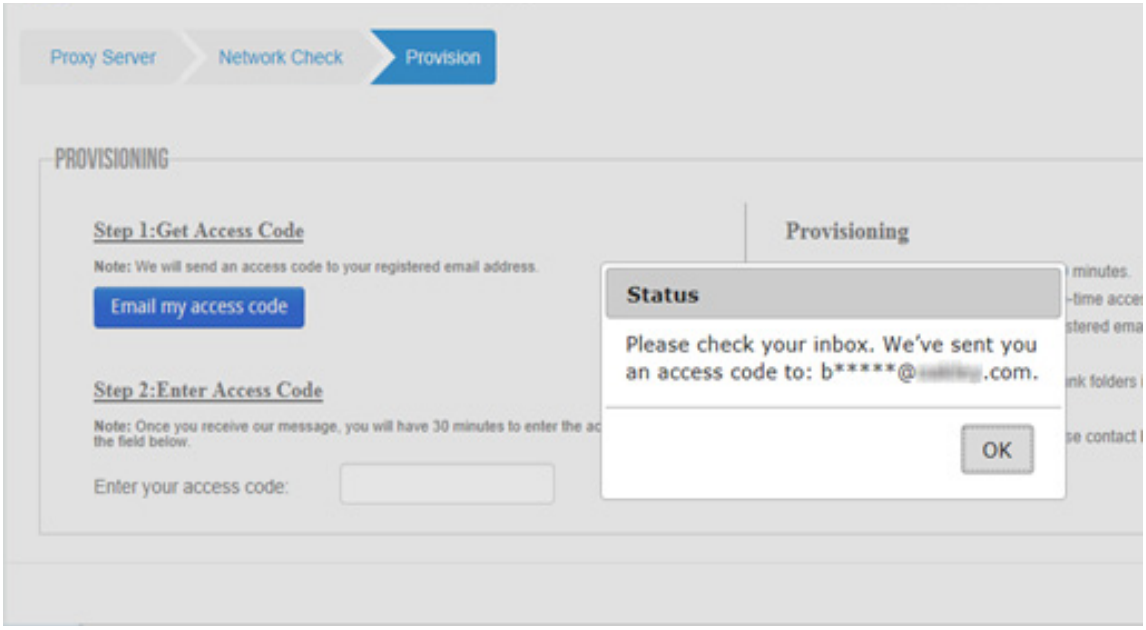

Figure 39 Status window

Note: The generated access code is an 8-digit long pin code and is valid for 30 minutes from the time it is generated. You must complete the installation within that time frame.

4. After you obtain your access code, enter it in the **Enter your access code** field, as shown in Figure 40 on page 42, and then click **Next**.

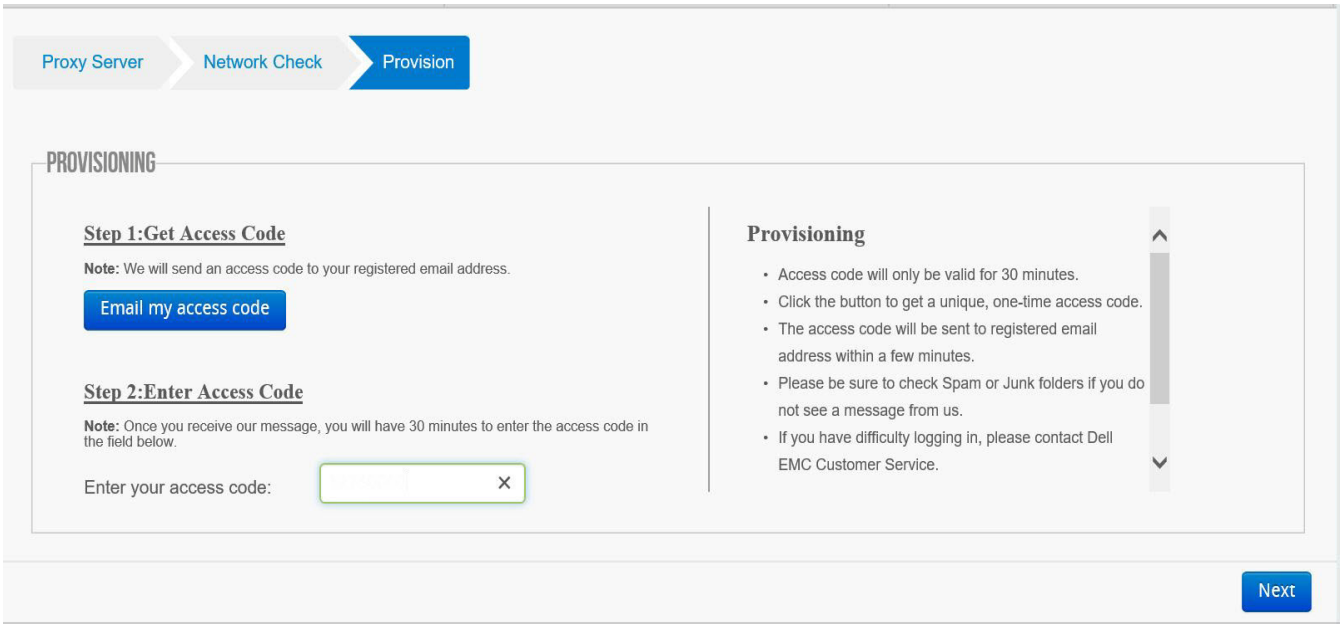

Figure 40 Enter access code

NOTICE

If a Customer account has more than 100 sites associated, then the Customer Site page will display the first 100 sites and a Search option, as shown in Figure 41.

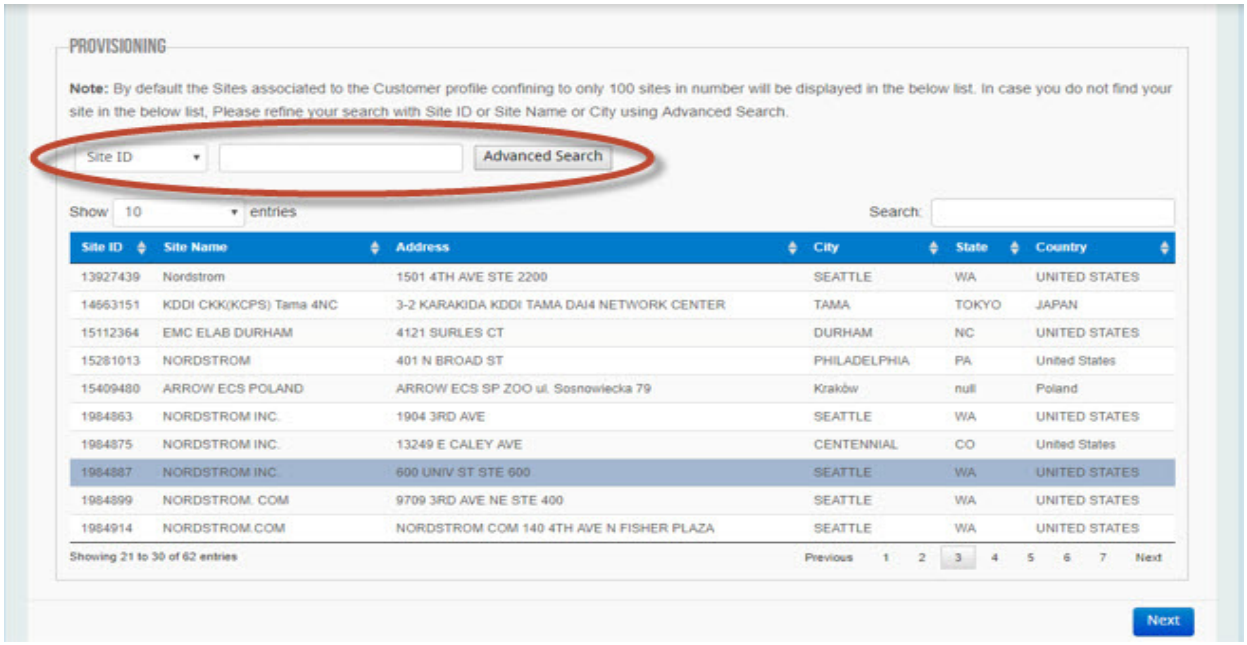

Figure 41 Customer Site page

5. If using the Search option, then enter the input value based on the drop-down selection, and then click **Search**. The search results list displays.

Note: You can also select the number of entries per page from the **Show** drop-down list.

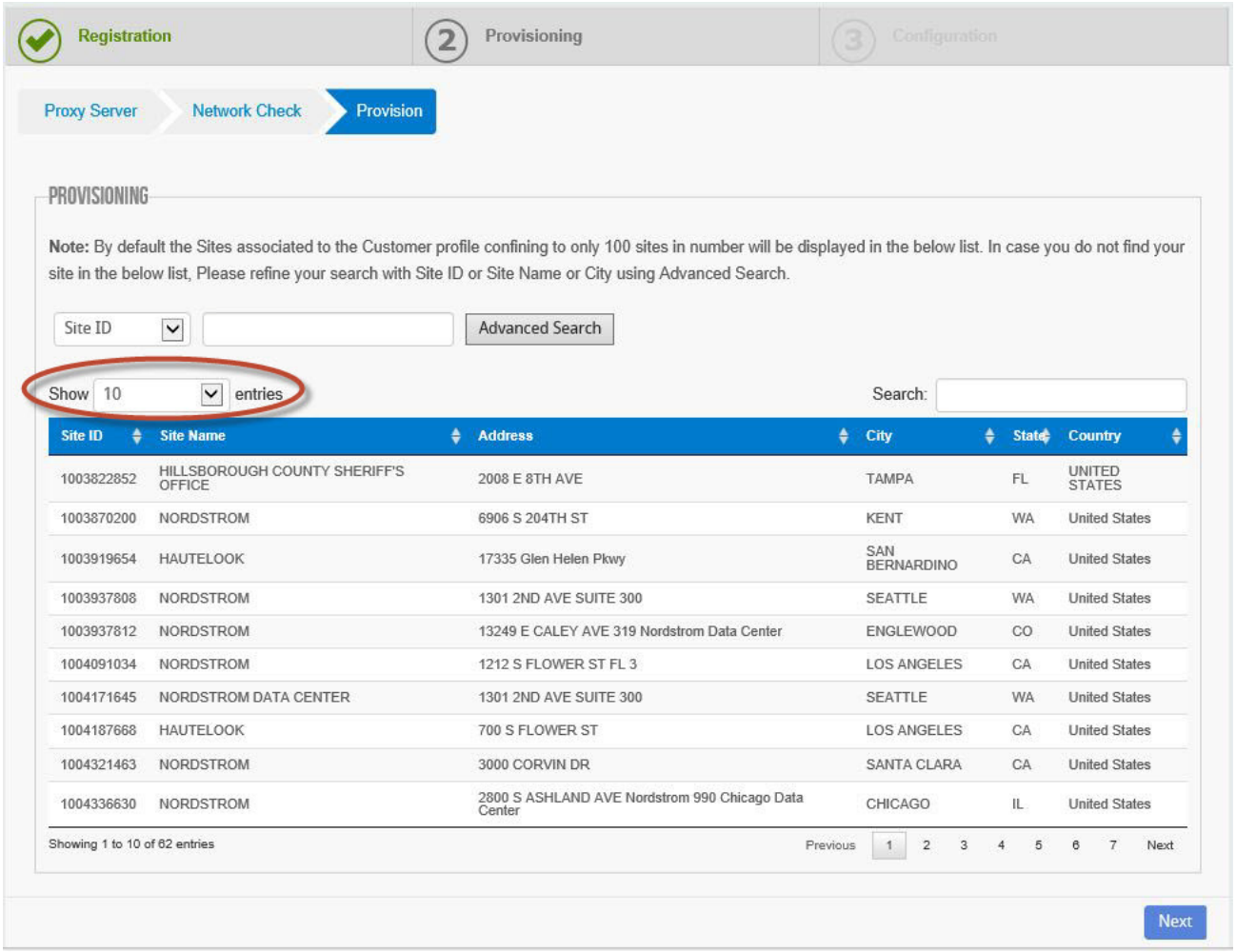

Figure 42 Show drop-down options

6. Select the site that you want to provision from the list, and then click **Next**. You may also use the search function to search a site by Site ID/Site Name/City. Note that at this point, you do not need administrator privileges to select sites. The page displays what you have selected, as shown in Figure 43 on page 45.

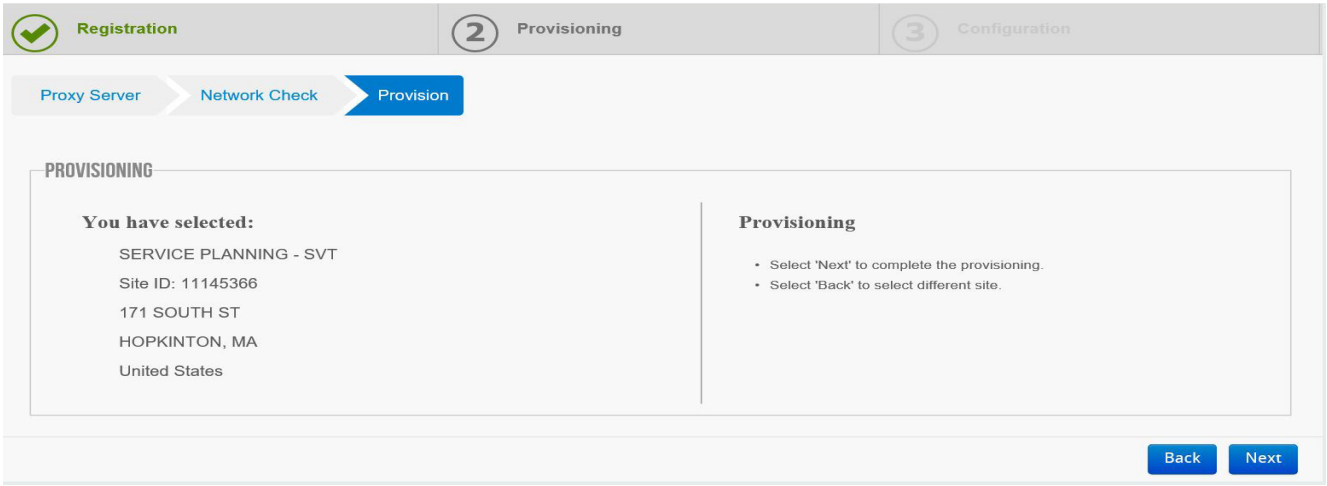

Figure 43 Site confirmation

7. Click **Next** to continue. The provisioning status appears, as shown in Figure 44 on page 45.

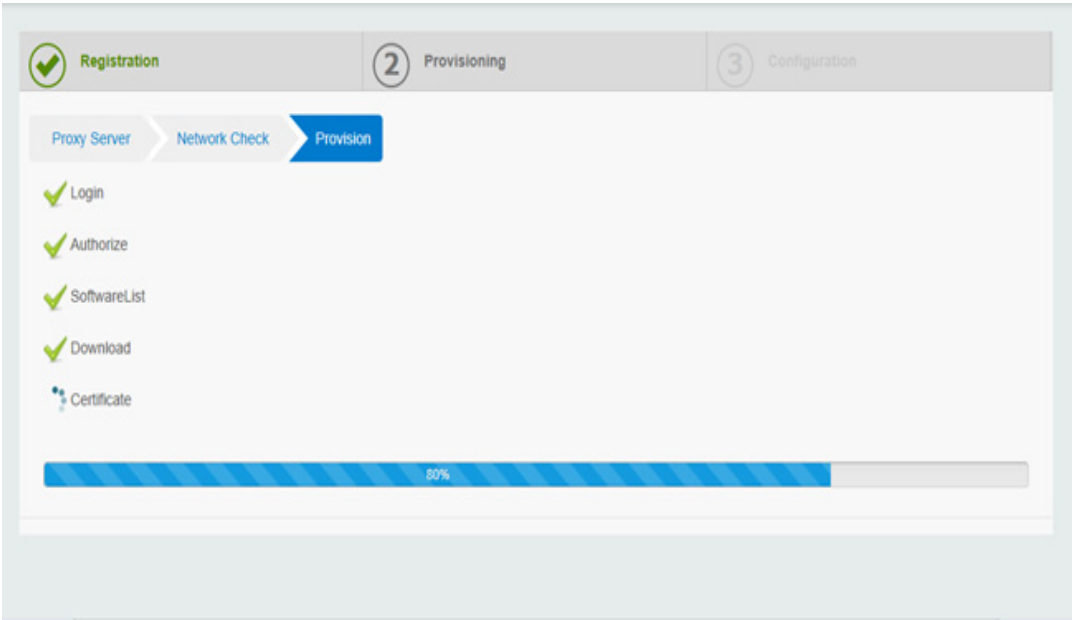

Figure 44 Provisioning status

When provisioning is completed, the **Status** window appears. If provisioning is successful, then the Dell EMC certificates are installed, SRS is provisioned and registered on the Dell EMC Enterprise, and a status message appears on the Web UI, as shown in Figure 45, "Provisioning Success window."

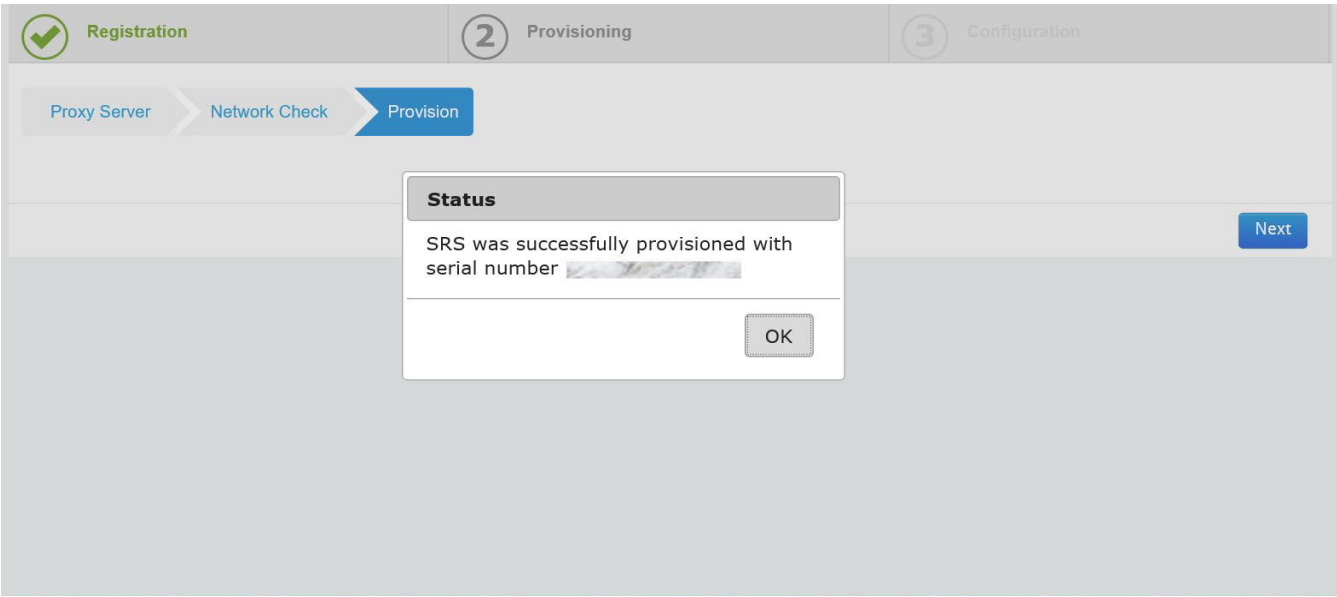

Figure 45 Provisioning Success window

Note: If, at any time during the 30-minute window for this procedure, you re-click **Email my access code,** then the previous code is automatically invalidated, and you must use the most current code.

8. Click **OK** to continue. The **Email Configuration** tab displays.

Email Configuration

In the **Email Configuration** tab, the following details need to be configured to get the notification mails, as shown in Figure 46 on page 47.

Note: The email server is on the customer's network. SRS should **not** be used for SMTP traffic destined for the customer, that is, mail will not be forwarded.

1. To send notification emails and Connect Home files (if enabled), provide the email server and its port details in the **Email Server** and **Port** text boxes.
2. Provide an email address in the **Sender Email** section.This address will be used as the FROM address in the email notifications.
3. Provide an email address in the **Notification Email(s)** section. This address will be used as the recipient address for any critical failure event notifications or failed Connect Homes on the SRS.

4. If you select **Enable on Success Notification**, then the customer will receive emails when a Connect Home is forwarded successfully to Dell EMC (if configured). Multiple email users and distribution lists can be added by separating the names with a comma.

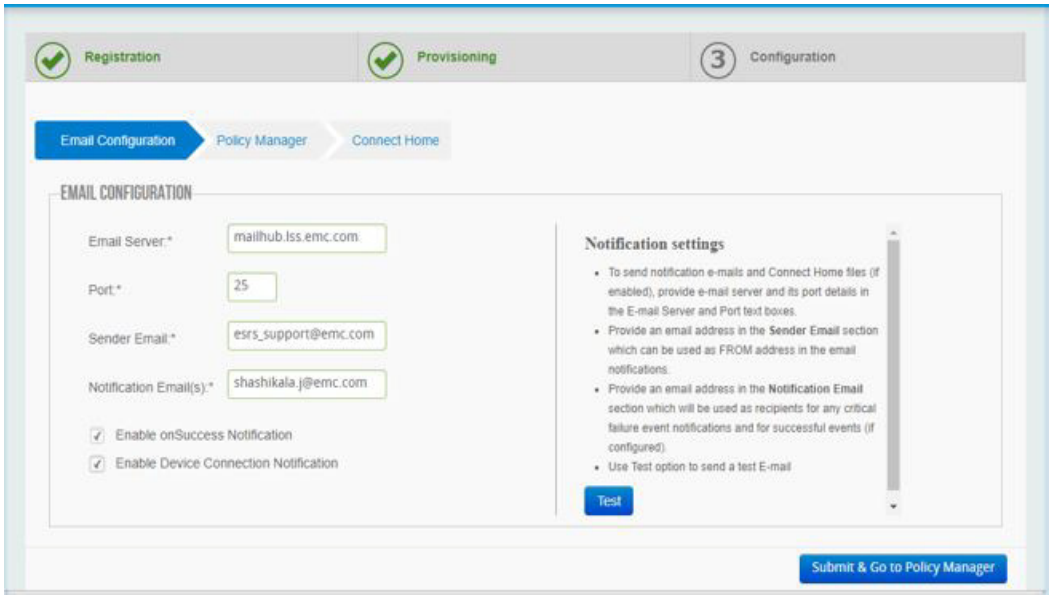

Figure 46 Email Configuration

5. Click **Test**. A pop-up window indicating that the test email was successfully sent displays.

   If the server settings are incorrect after clicking **Test**, then an error message displays.

   If you click **OK** and then click **Submit & Go to Policy Manager** when the server validation fails, then a pop-up warning message appears, as shown in Figure 47 on page 47. During initial provisioning process only, this pop-up message appears if the email configuration is for the first time only and it fails.

Figure 47 Warning pop-up message

   The email information is not saved in the SRS database if the email configuration information is incorrect.

   You have to choose **Configure Later** or **Retry**.

   If you click **Configure Later**, you are taken to the next tab to continue provisioning SRS. You will have the option to configure the email after provisioning SRS.

   Note: Configure Later button does not save the email information in the SRS database.

Policy Manager

If you are using Policy Manager (it must be installed and operational), then complete the applicable information on this tab as follows:

Note: SRS can use any version of Policy Manager.

1. In the **Policy Manager** tab, enter the following applicable information:
   - To enable Policy Manager on this page, enter the IP address, the port number, and the SSL strength (Low, Medium, or High). Dell EMC recommends that the SSL strength be High.
   - If you are not using SSL for communication to the Policy Manager, then clear the **Enable SSL** checkbox.
   - For **Enable Agent Authentication for Policy Manager** option, if this option is selected, then the user can send authentication requests. Agent authentication is available only for SSL. Once the user selects this option, they are required to enter the following details:

     Note: This option does not apply to eVE in Unity/CloudIQ Collector.

     – User Name - Policy Manager admin user name

     – Password - Policy Manager admin password

     – Policy Manager Port - Policy Manager user port

       Note: Enable agent authentication is available only if the user enters the port number 8445.

     – Agent PassKey - Passkey provided during installation (encrypted in UI)

     – Configure - User can send authentication request using this option
   - If a proxy server is not used for communication to the Policy Manager, then clear the enable proxy server checkbox as well.

2. When you are done, click the **Test** button to check the connectivity to Policy Manager from SRS. If the connection is successful, then a message appears beneath the **Test** button, as shown in Figure 48 on page 49.

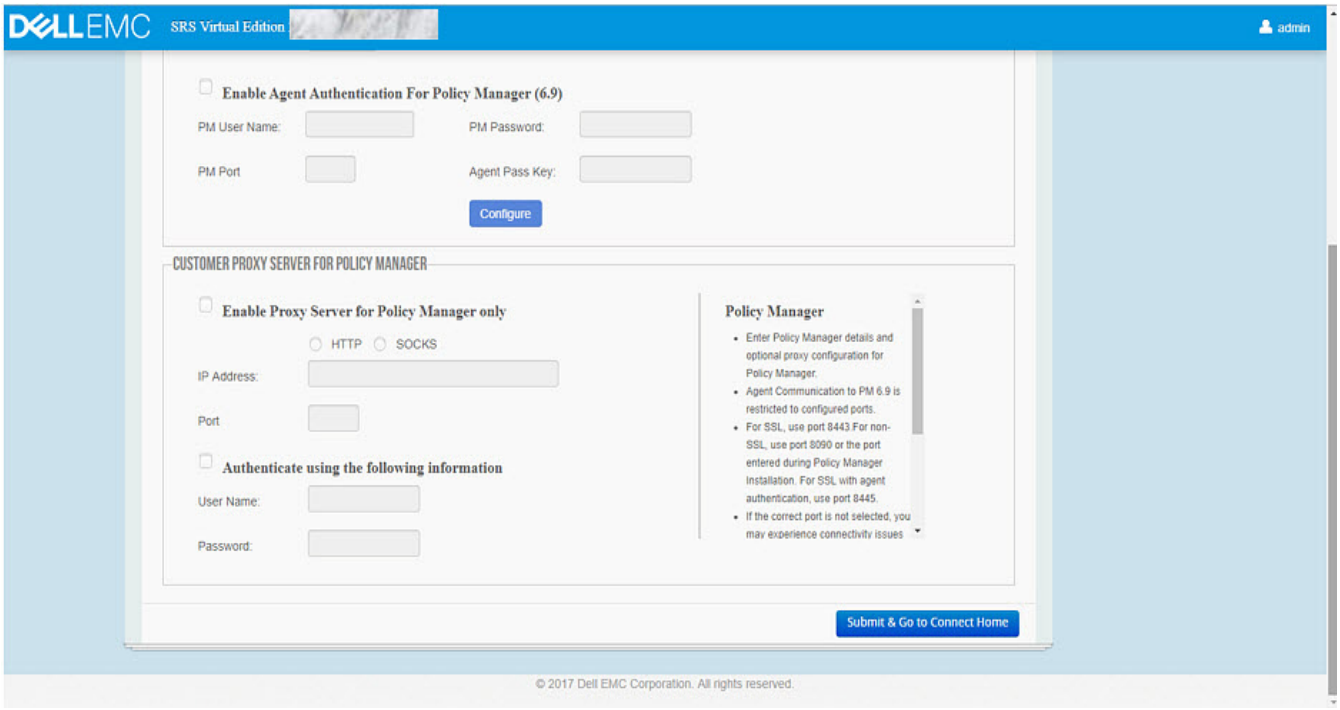

Figure 48 Policy Manager

3. Click **Submit & Go to Connect Home**. The status pop-up window appears.
4. Click **OK** to continue. The **Connect Home** tab displays.

Connect Home

Managed File Transfer (MFT) is the default and primary channel for the Connect Home files. In the event MFT is not available, Connect Home will failover to the SRS channel.

On the **Connect Home** tab, you can configure and test Connect Home failover to alternate paths using FTPS and/or Email (SMTP) via the customer SMTP server.

Note: Connect Homes to Dell EMC on alternate paths will only occur if the Primary Method of SRSv3 (MFT) is unavailable.

Completing the **Connect Home** tab is highly recommended but ***not*** required. Your firewall(s) and proxy server may need to be configured to pass this traffic. See the Ports Requirement Document for ports used. **Again, note that these alternate paths are only used if the MFT channel is unavailable**.

To enable Connect Home failover:

Note: ConnectEMC can be enabled for the following transport types as a failover channel in the corresponding order: 1) FTPS, 2) Email.

1. Select either or both of the Connect Home connections. The **Test** button becomes enabled, as shown in Figure 49 on page 50.

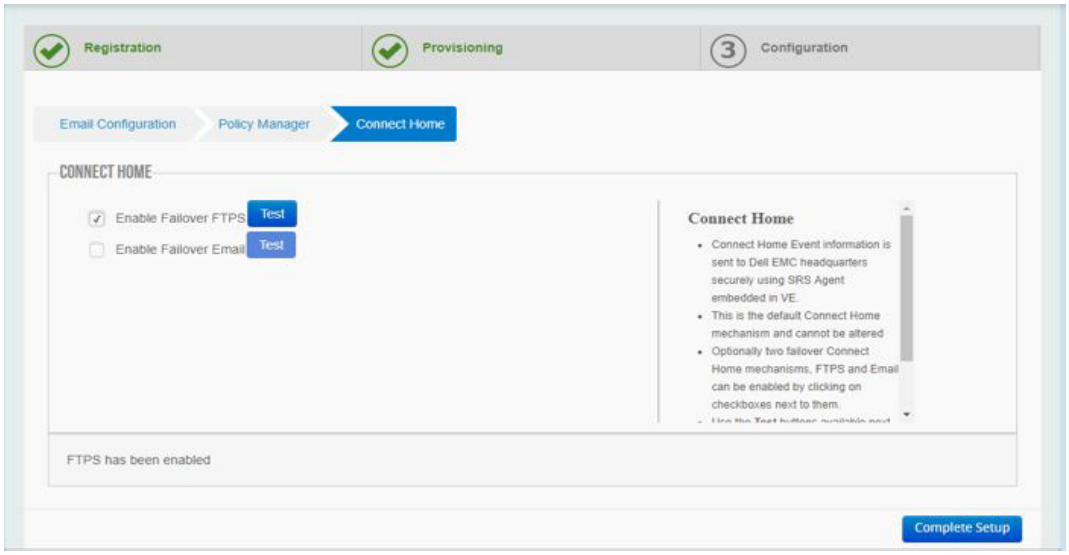

Figure 49 Selecting connections

2. Click the **Test** button to test the connection to Dell EMC.
3. If the tests are successful, then the following messages appears at the bottom of the page:
   - For FTPS: **Test connect home using FTPS was successful**
   - For email: **Test connect home using Email was successful**

   Note: The customer must configure their proxy server(s)/firewalls per the Ports Requirement document.
4. Click **Complete Setup**. The Setup Complete page appears.
5. In the Setup Complete page, click the Home button (as shown in Figure 50 on page 50) to access the SRS Web UI Dashboard, as shown in Figure 51 on page 51.

Figure 50 Home button

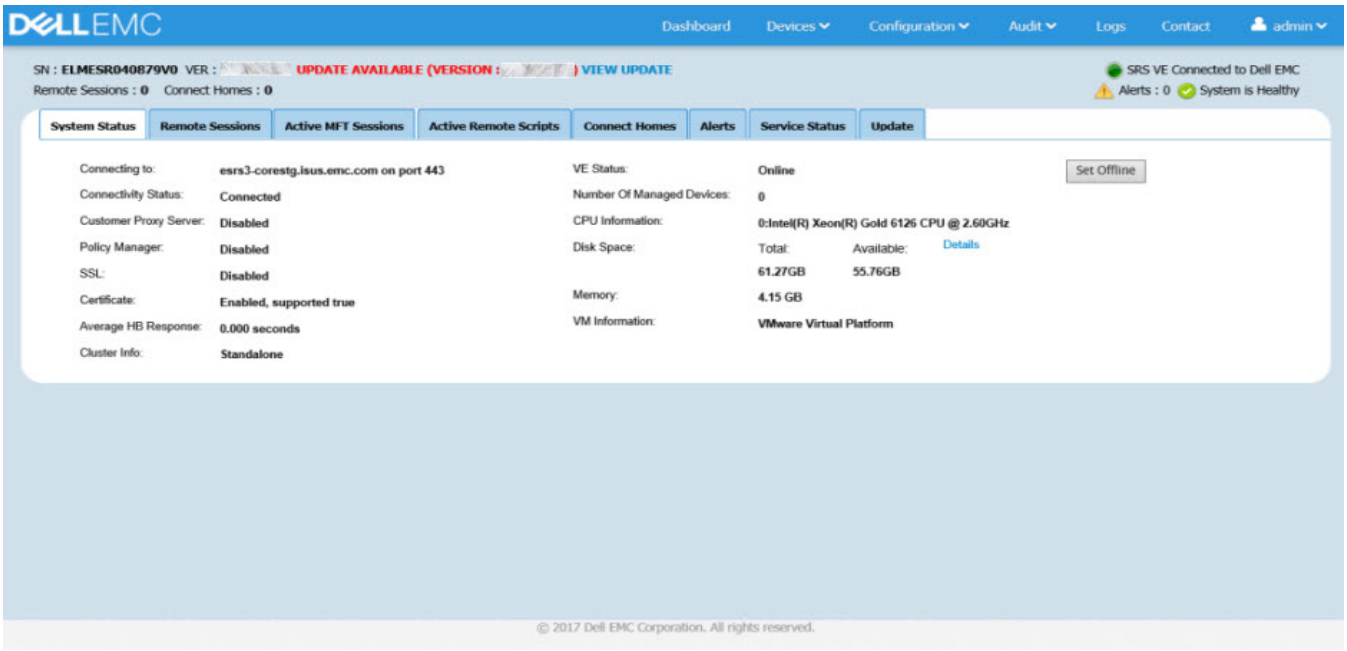

Figure 51 Dashboard

APPENDIX A
IP Addresses used by SRS

This appendix lists the article that provides the IP addresses used by the Secure Remote Services Virtual Edition.

- Key information 54
- Article access 54

Key information

Article Number: 0000494729

Version: 1

ID: emc238467

Domain: EMC1

Solution Class: 3.X Compatibility

Note: Always check `support.emc.com` for the latest version of this article as it may have been updated.

Article access

The following is a Primus(R) eServer solution.

Article Title: What IP addresses are used by the EMC Secure Remote Services IP Solution?

This is from KB article 494729. To access this article, go to:

https://support.emc.com/kb/494729

APPENDIX B
SRS v3.x on Hyper-V Install Process

This appendix describes the Hyper-V install process for SRS v3.xx.

- Procedure 56
- Network Configuration Using YaST 64

Procedure

Follow the steps below to install the SRS Virtual Edition (SRS v3.xx) on your Hyper-V:

1. Copy the VHD for the SRS Virtual Edition to the location where you wish to host the virtual disk for the virtual machine.
2. Uncompress the zip file.
3. Launch the Hyper-V Manager, as shown in Figure 52 on page 56.

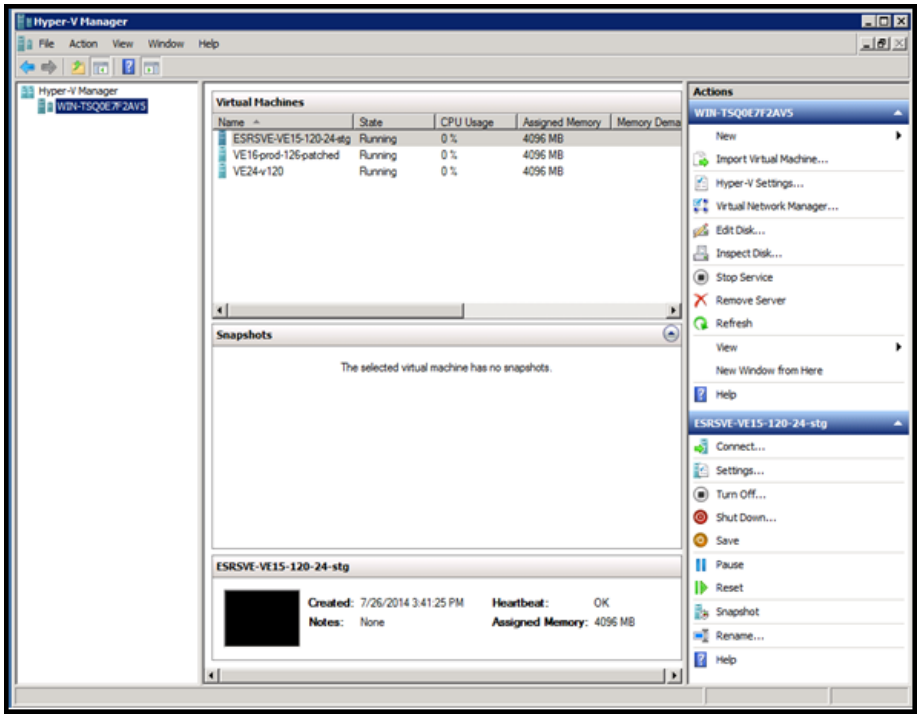

Figure 52 Launching Hyper-V Manager

4. Create the virtual machine that will be hosting the SRS Virtual Edition.
   a. In the upper-right corner, select **New > Virtual Machine**, as shown in Figure 53 on page 57.

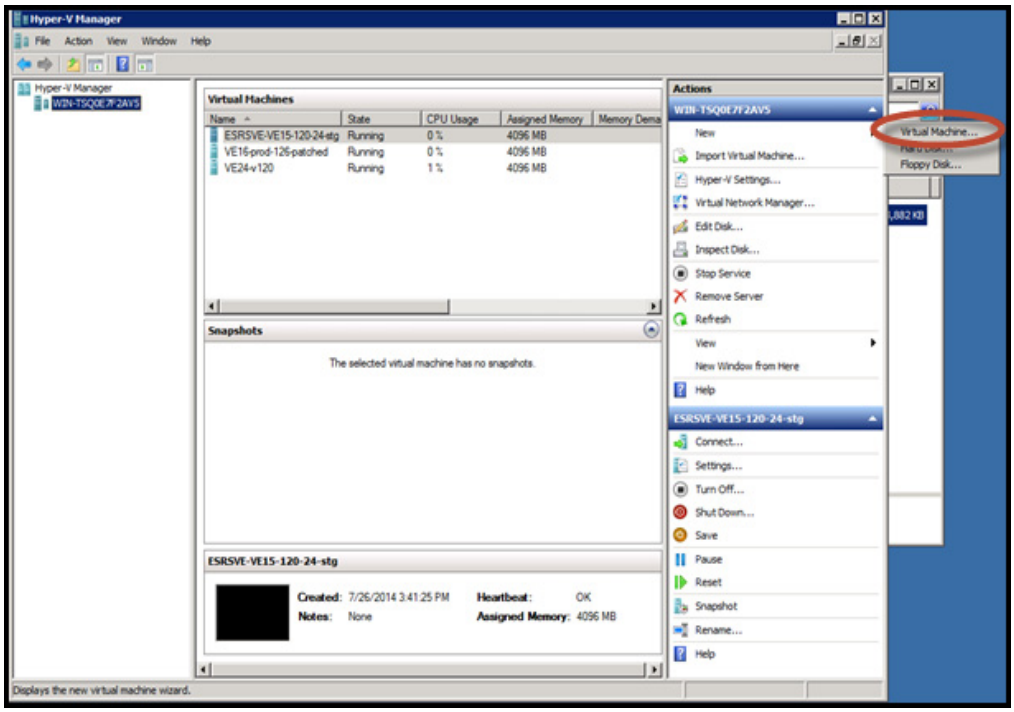

Figure 53 Selecting New › Virtual Machine

   b. Click **Next**, as shown in Figure 54 on page 57.

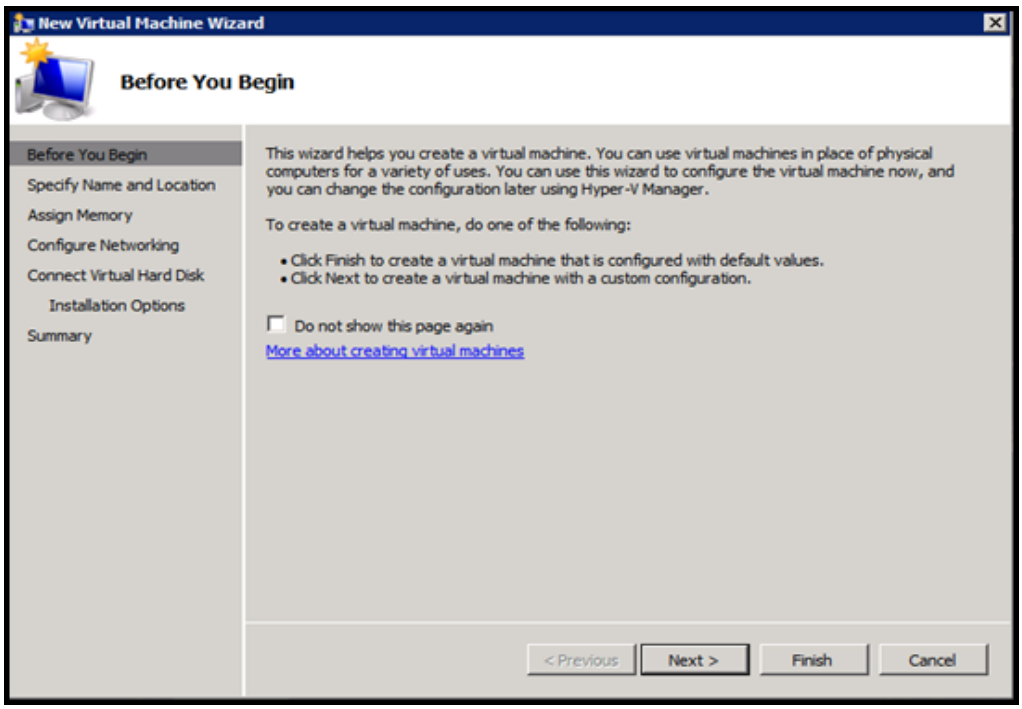

Figure 54 Selecting Next

c. In the upper-right corner, select **New > Virtual Machine**, as shown in Figure 55 on page 58.

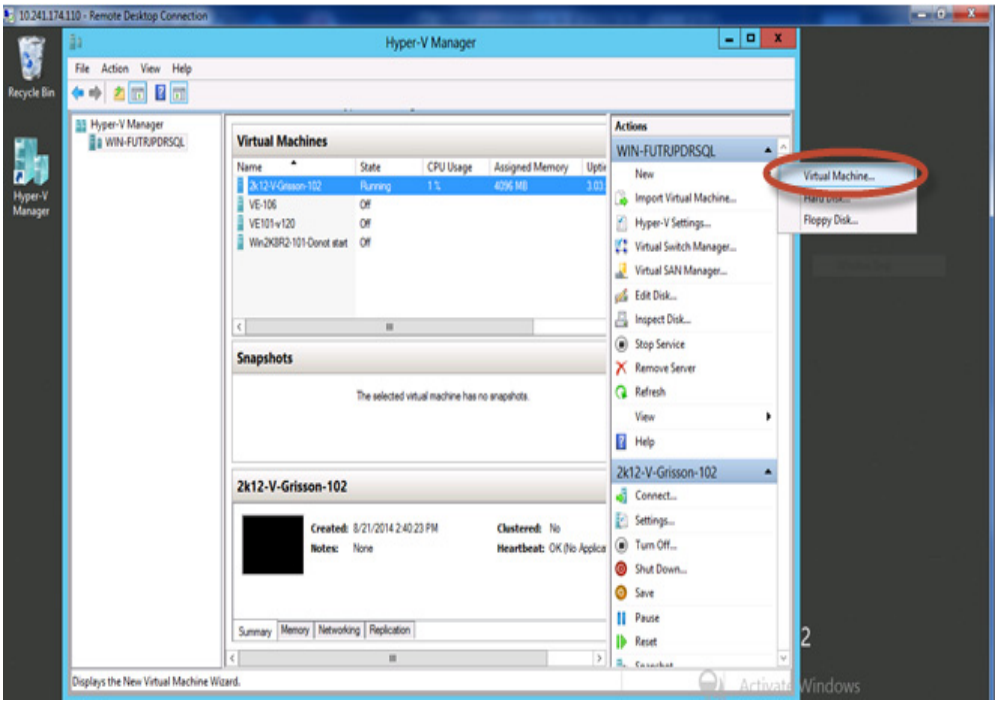

Figure 55 Selecting Virtual Machine

d. Name the virtual machine, as shown in Figure 56 on page 58, and then click **Next**.

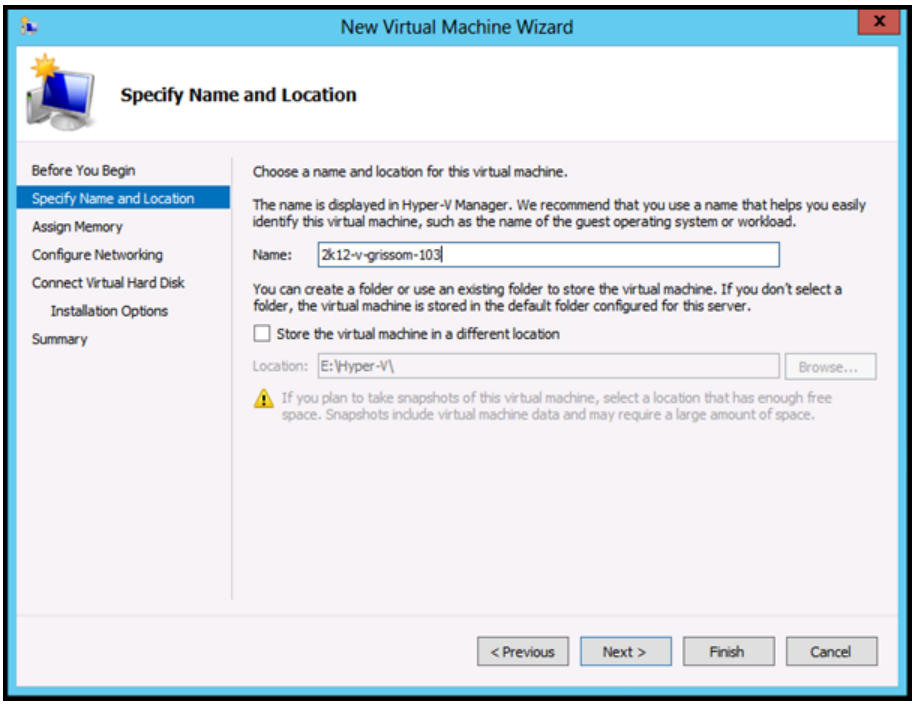

Figure 56 Specifying name

e. Define the memory (4 GB [4096 MB]), as shown in Figure 57 on page 59, and then click **Next**.

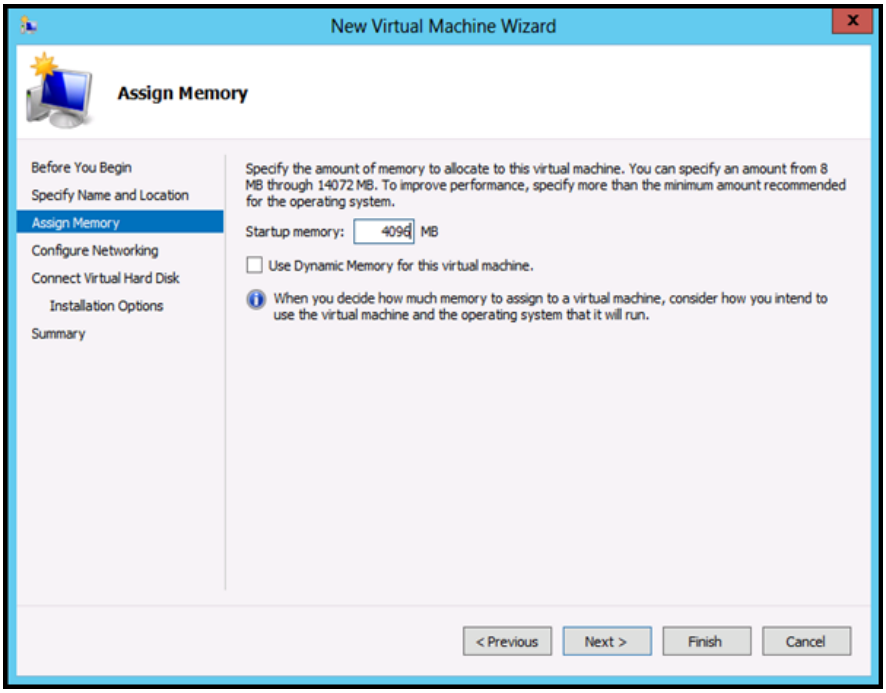

Figure 57 Assigning Memory

f. In the Connection menu, select the network card that will be used by the virtual machine, and then click **Next**, as shown in Figure 58 on page 59.

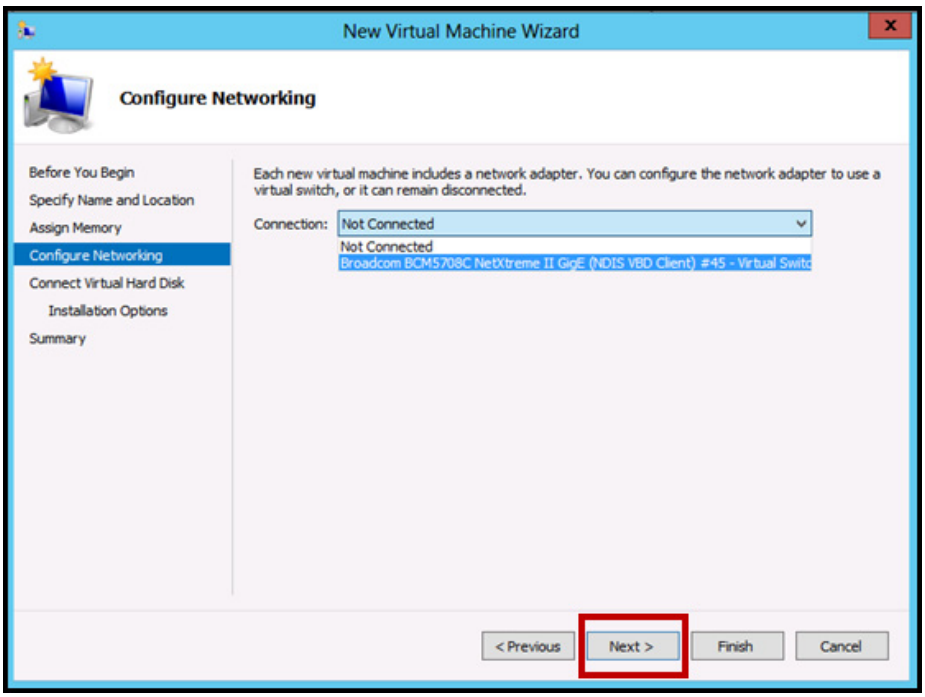

Figure 58 Configuring Networking

g. Select the location to which you copied the VHD file for this SRS, as shown in Figure 59 on page 60.

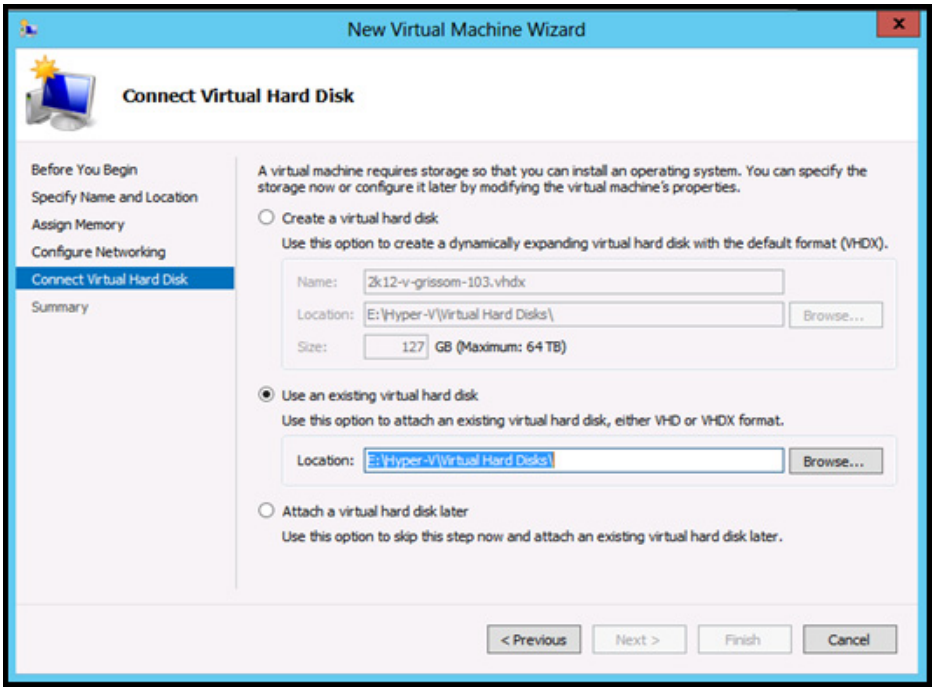

Figure 59 Selecting location

h. Click **Open**, as shown in Figure 60 on page 60.

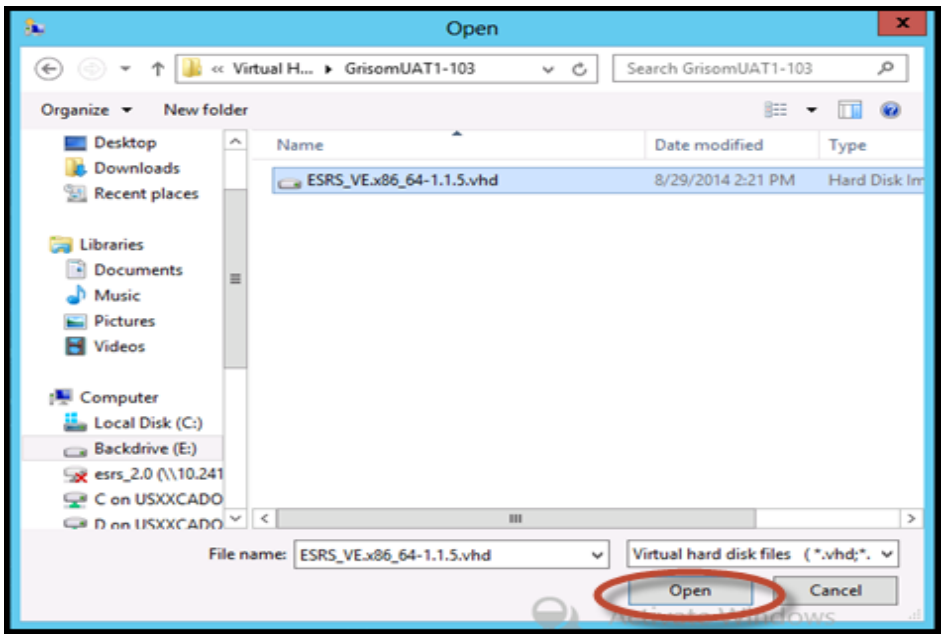

Figure 60 Clicking Open

i. Browse for the location of the virtual hard disk, and then click **Next**, as shown in Figure 61 on page 61.

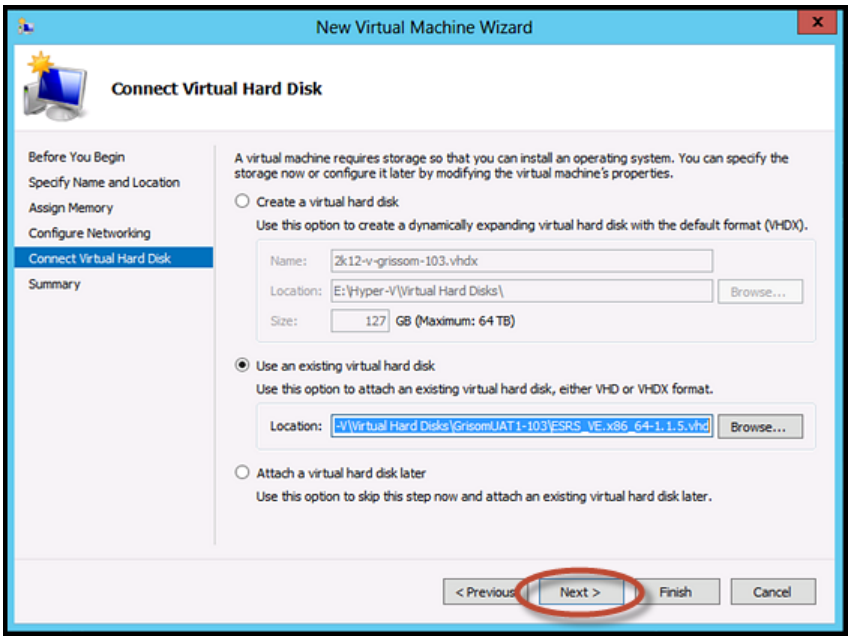

Figure 61 Entering location and clicking Next to continue

j. Review the summary, and click **Finish**, as shown in Figure 62 on page 61. The new SRS Virtual Edition virtual machine is now configured in the Hyper-V environment. You must now connect to the virtual instance and start the host, which starts the first boot process.

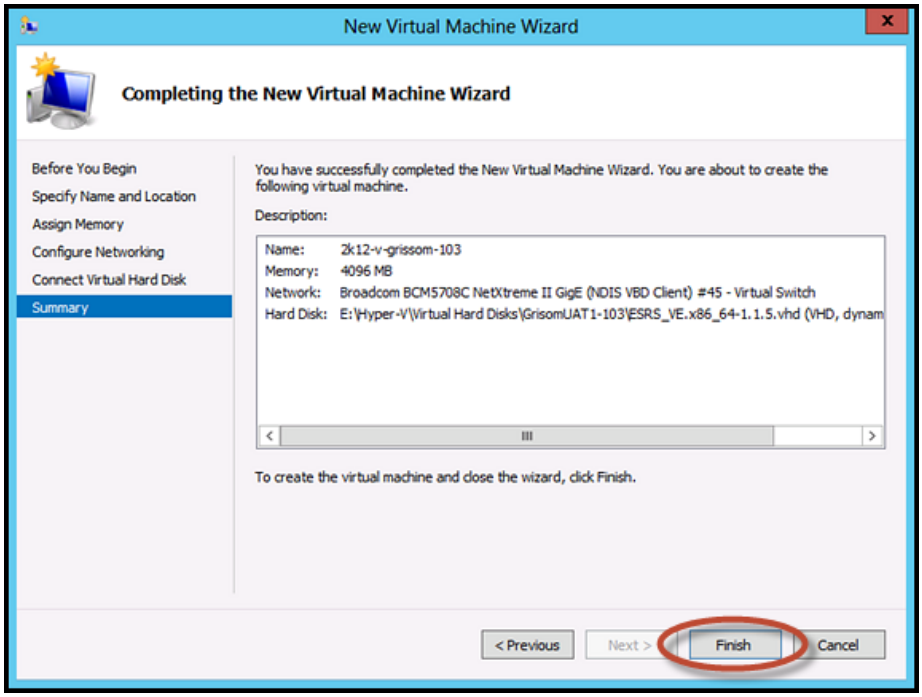

Figure 62 Clicking Finish to complete

k. The first boot process starts the virtual host. You must configure the host name, the network, the password of the root user, and so forth.

⚠CAUTION

For SRS VE running on Hyper-V, to avoid SRS connectivity loss under specific circumstances, make sure the MAC address is set to Static in the Advanced Features of the Network Adapter.

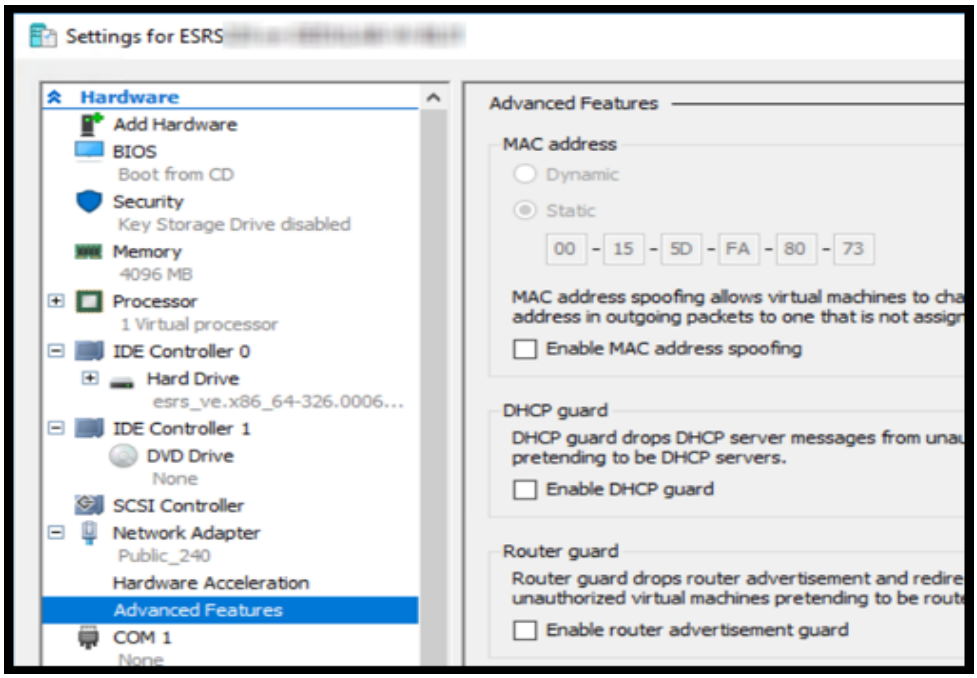

Figure 63 Advanced Features

l. Select the new virtual machine, and then click **Connect**, as shown in Figure 64 on page 63.

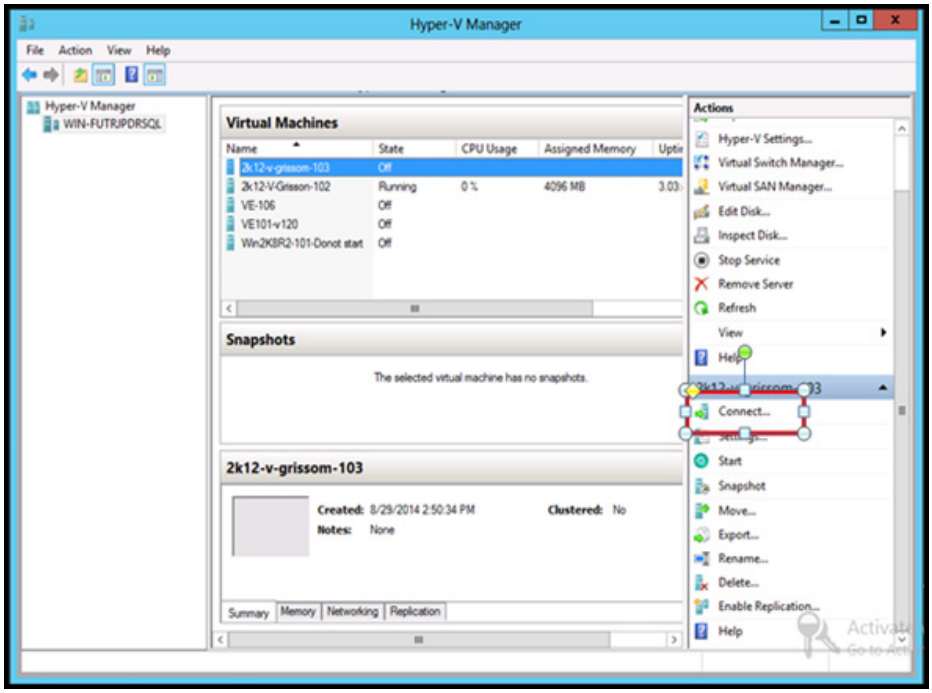

Figure 64 Clicking Connect

m. The following screen appears. Click the **Start** icon, as shown in Figure 65 on page 63.

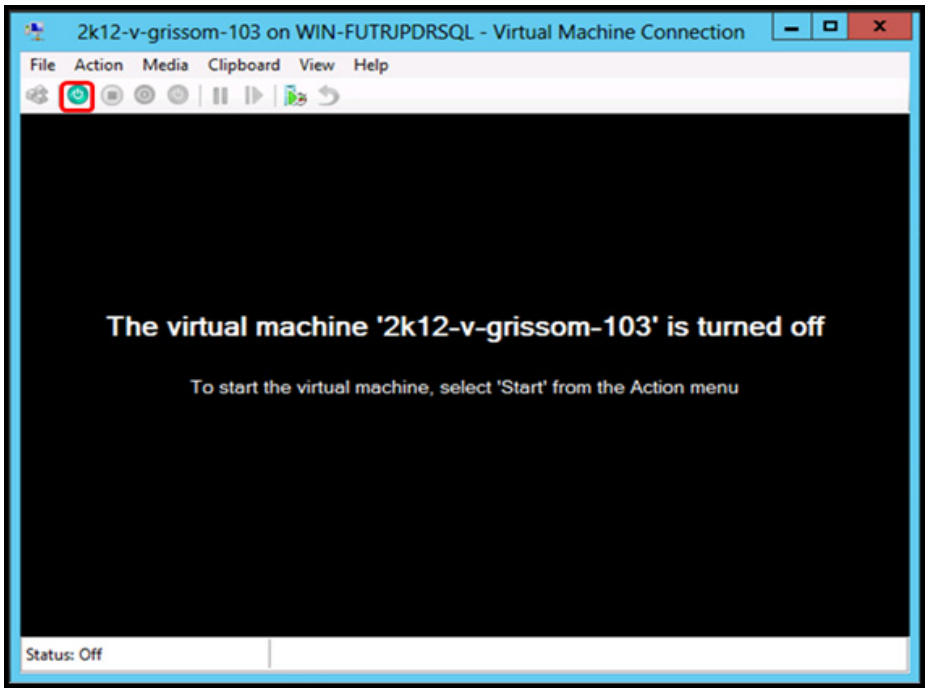

Figure 65 Powering on

n. The SRS starts the first boot process, as shown in Figure 66 on page 64.

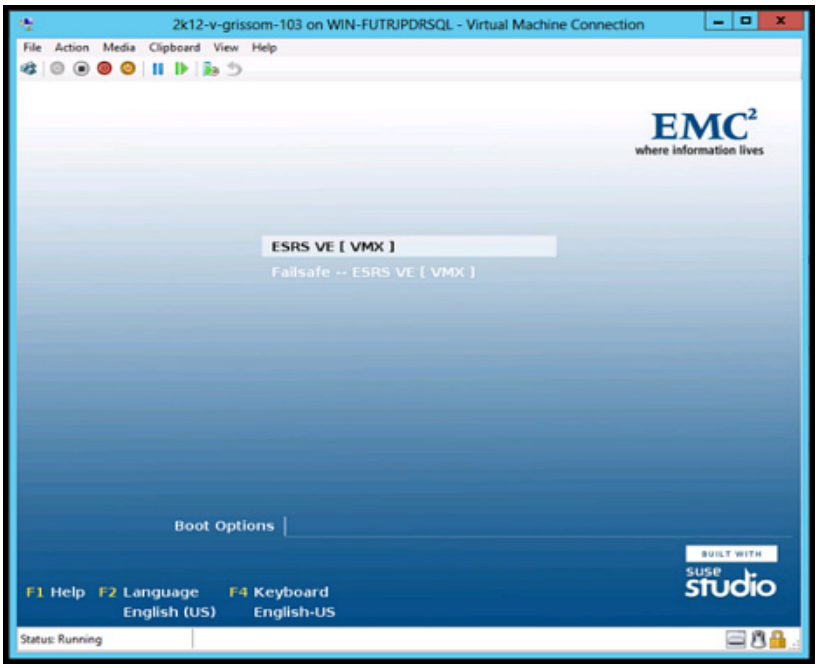

Figure 66 First boot configuration

o. When the first boot process is completed, go to Network Configuration Using YaST.

Network Configuration Using YaST

Note: Requires shell or console access to the shell of the SRS.

1. From an ssh session or a console session of the SRS shell, log in using the root credentials established during the first boot configuration of the install process, as shown in Figure 67 on page 65.

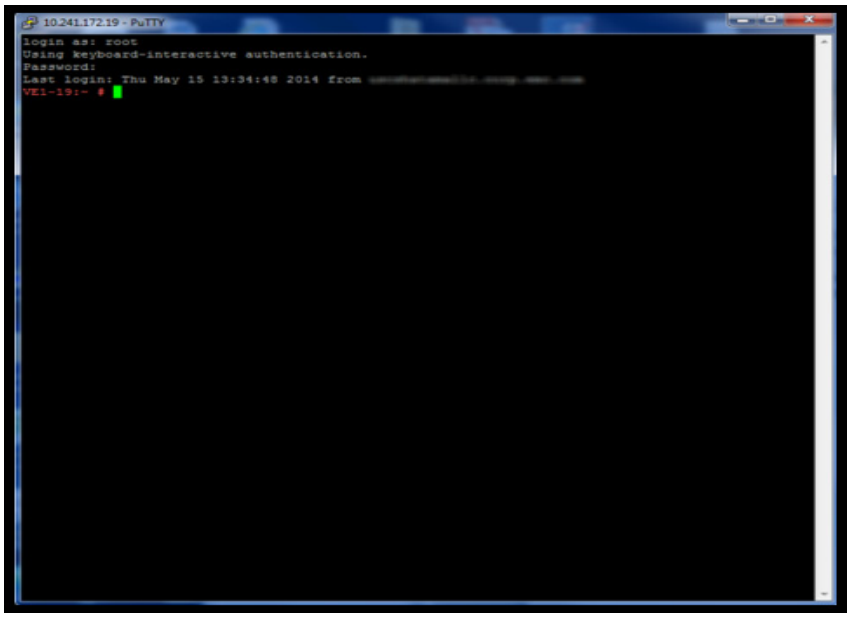

Figure 67 Logging in as root

2. At the prompt, type **yast2**, and then press **Enter**. The YaST2 user interface appears, as shown in Figure 68 on page 65.

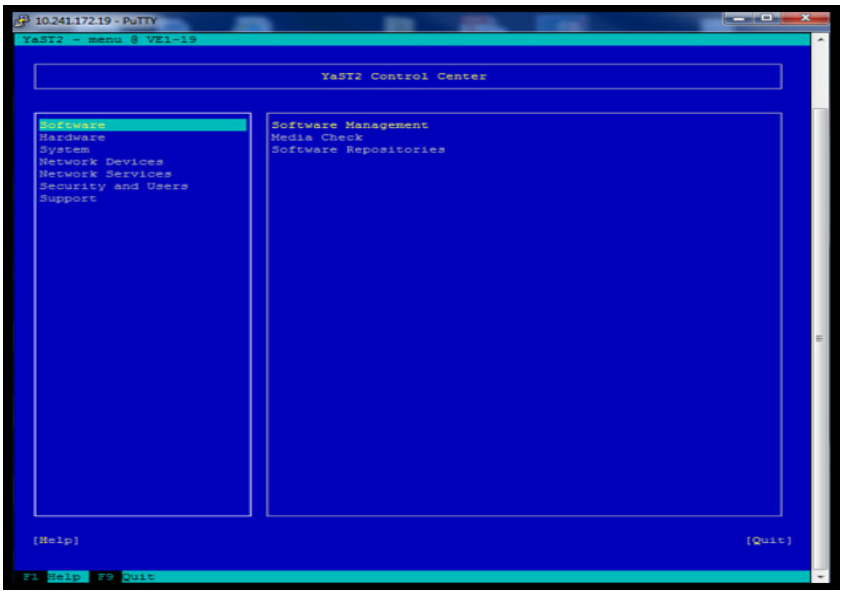

Figure 68 User interface

3. Select **Network Devices**, as shown in Figure 69 on page 66.

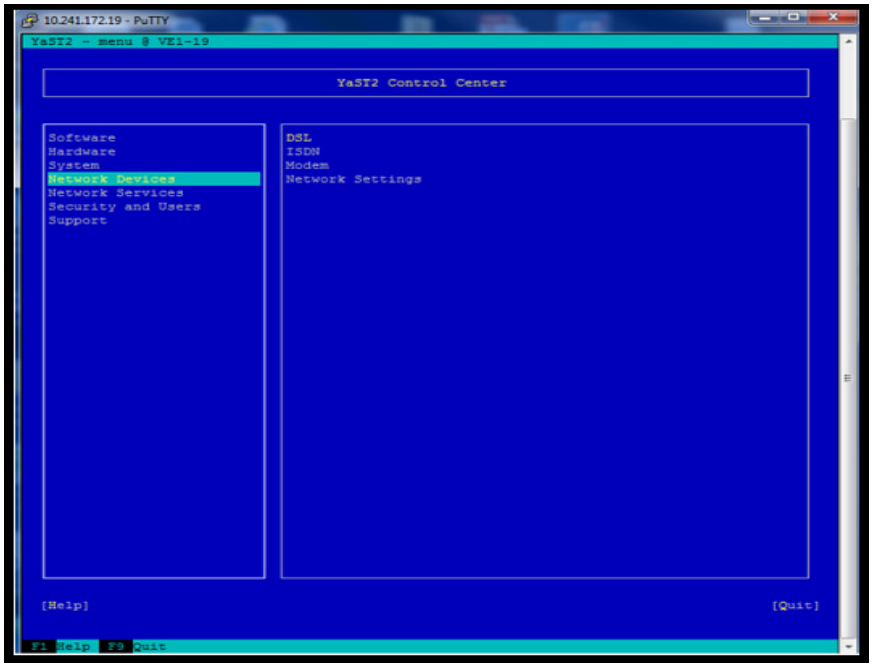

Figure 69 Selecting Network Devices

4. Use the **Tab** key to navigate to the right-side pane, and then select **Network Settings**, as shown in Figure 70 on page 66.

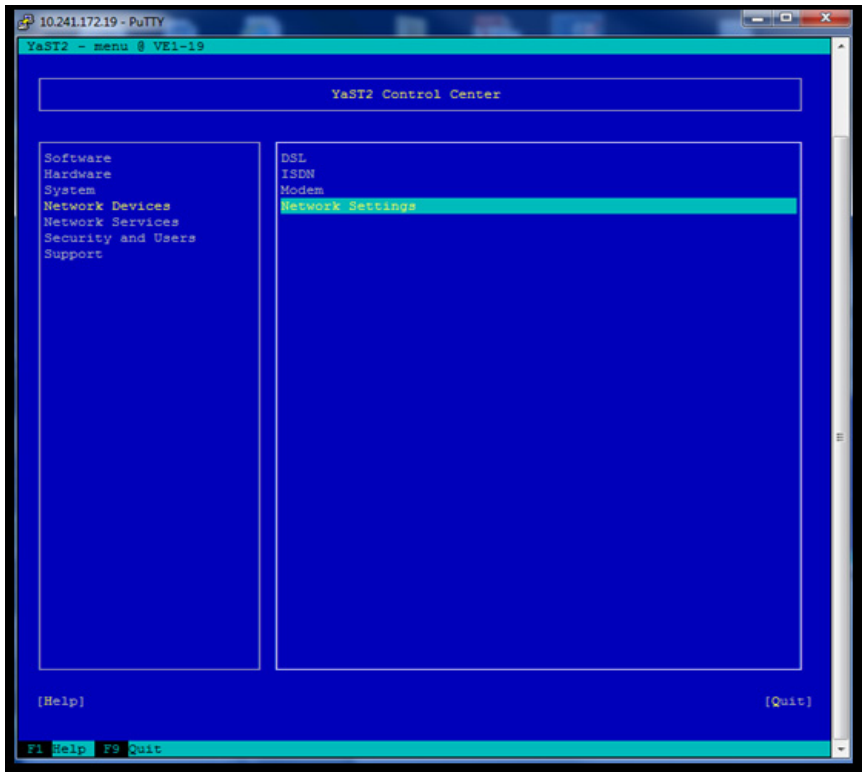

Figure 70 Selecting Network Settings

5. Press **Enter**. The Network Settings screen appears, as shown in Figure 71 on page 67.

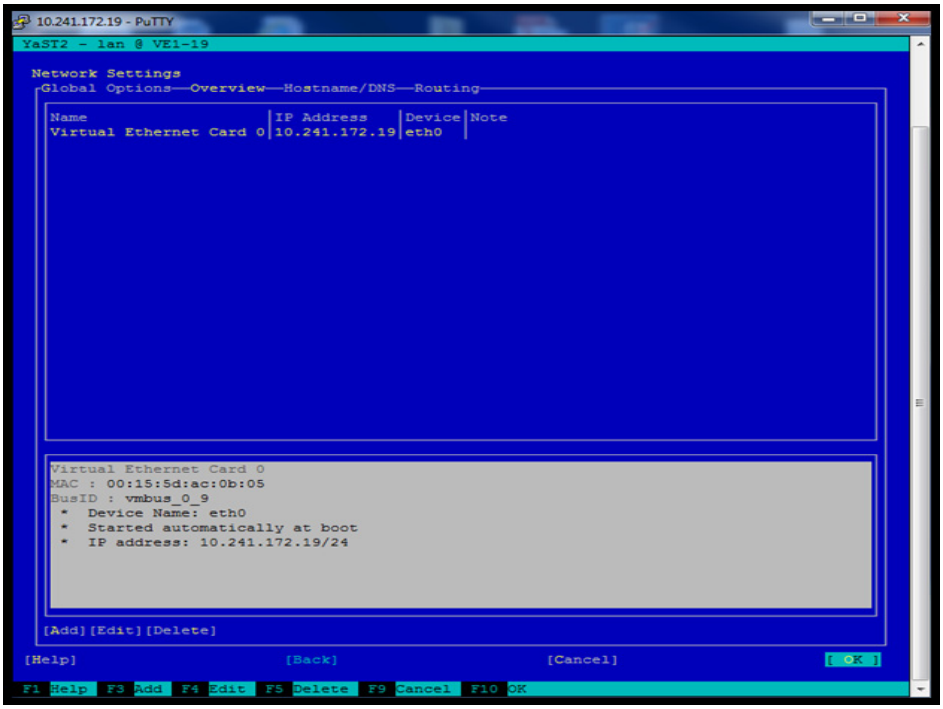

Figure 71 Network Settings screen

6. In the Network Settings screen, you can perform the following:
   a. Edit the IP address or host name (as shown in Figure 72 on page 67) by using the **Tab** key, **Alt-I**, or **F4**. When done, use **Tab**, **Alt-N**, or **F10** for **Next**.

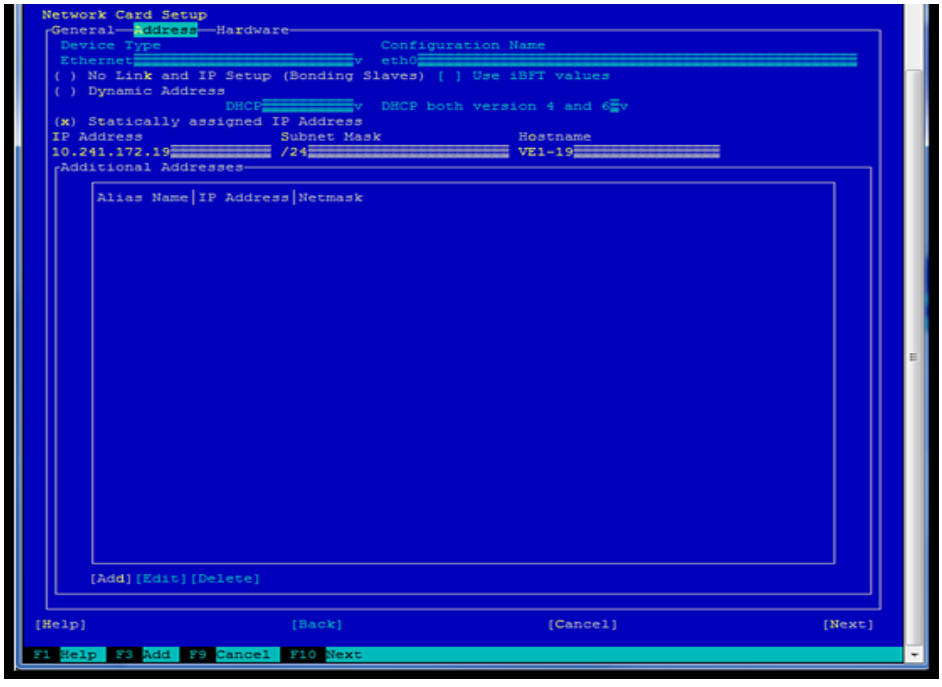

Figure 72 Network Card Setup screen

b. Edit the DNS configuration using **Alt-S**, as shown in Figure 73 on page 68. If editing is complete, then use **Tab**, **Alt-O**, or **F10** for **OK**. All edits to the network configuration will be written to the system configuration.

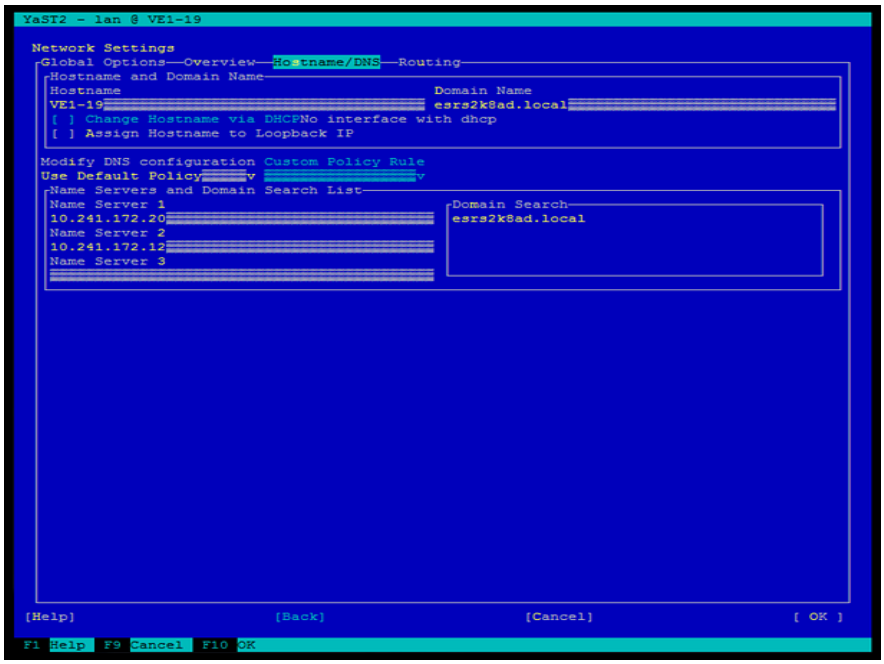

Figure 73 Changing DNS configuration

c. Edit the default route/gateway using **Alt-U**, as shown in Figure 74 on page 68. When editing is complete, use **Tab**, **Alt-O**, or **F10** for **OK**. All edits to the network configuration are written to the system configuration and the network services become activated, as shown in Figure 75 on page 69.

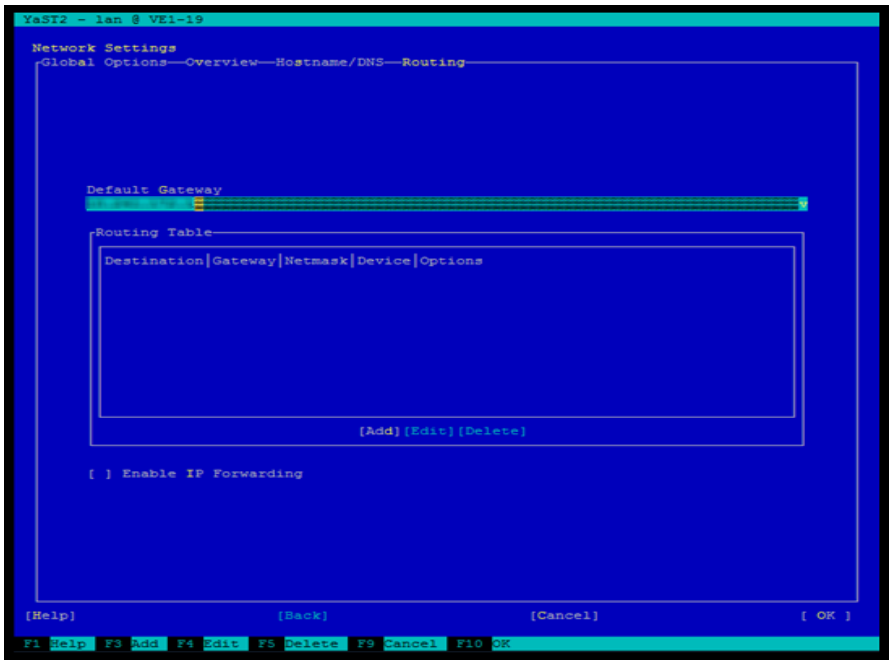

Figure 74 Editing the default gateway

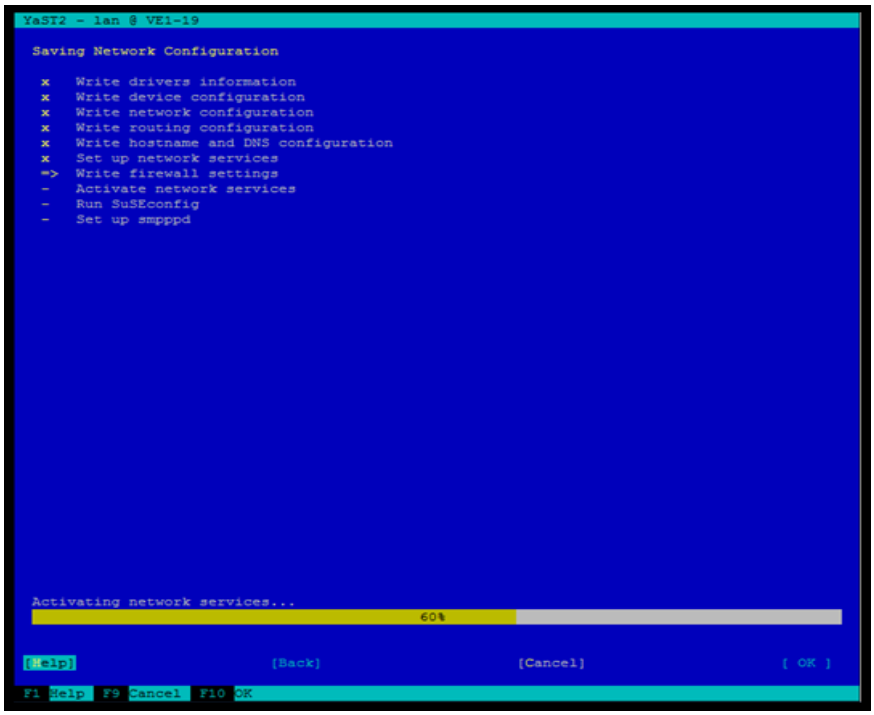

Figure 75 Saving network configuration

7. If you need to set the date and time, then select **System** on the left-side pane, tab to the right- side pane, select **Date and Time** as shown in Figure 76 on page 69, and then press **Enter**. The Clock and Time Zone screen appears.

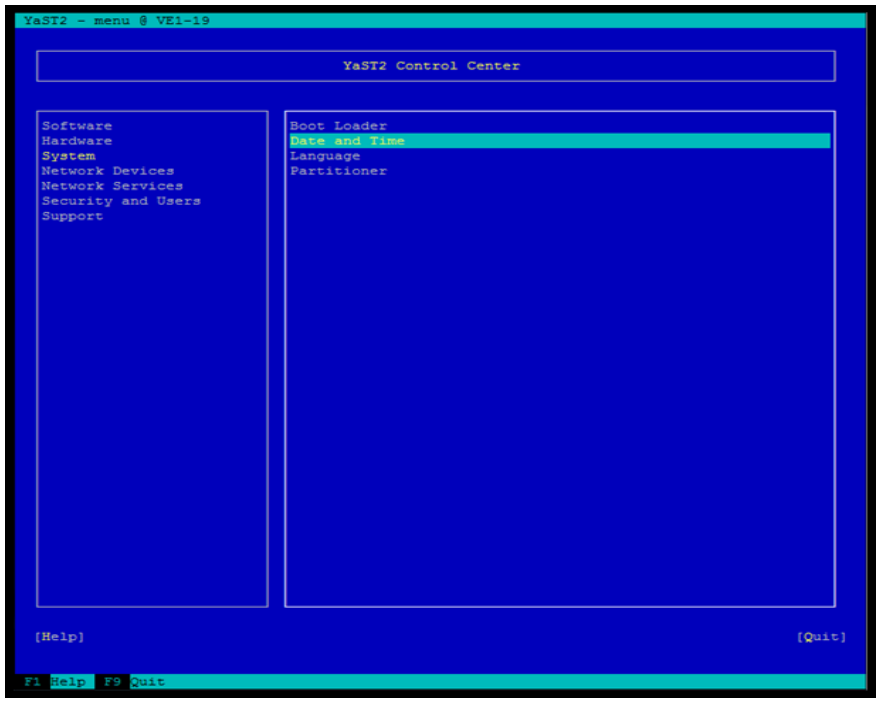

Figure 76 Setting date and time

8. In the Clock and Time Zone screen, make the desired changes, as shown in Figure 77 on page 70. When you are done, use **Tab**, **Alt-O**, or **F10** for **OK**. This step takes you to the original page of the YaST2 Tool, as shown in Figure 78 on page 70.

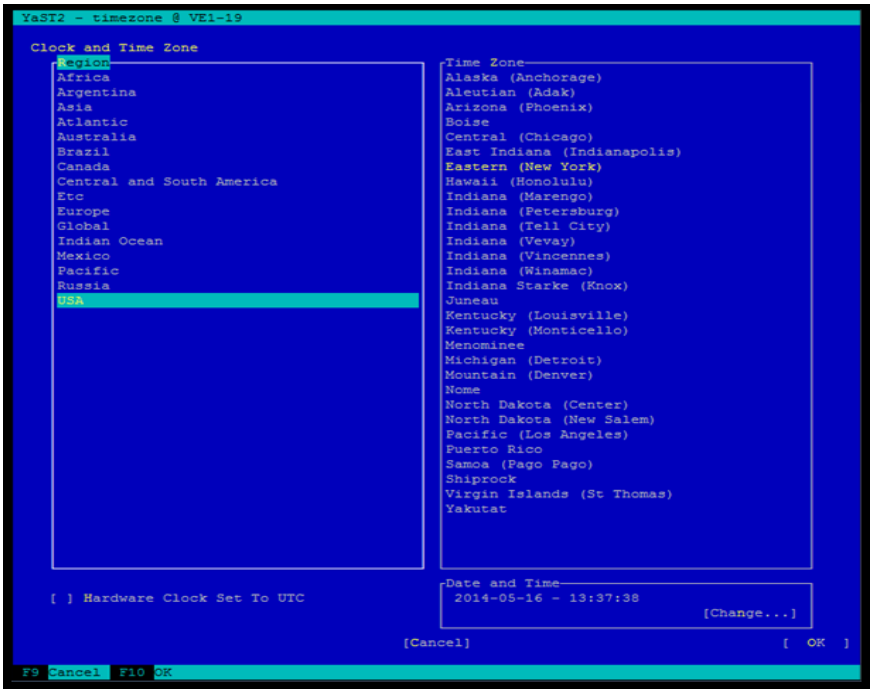

Figure 77 Clock and Time Zone screen

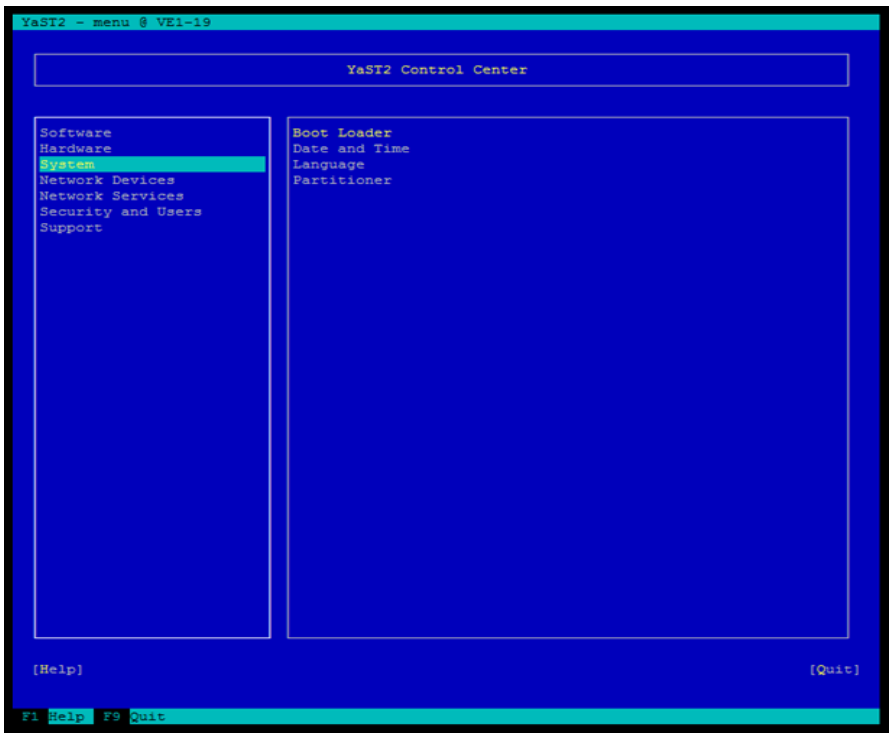

Figure 78 YaST2 Control Center

9. Use **Tab**, **Alt-Q**, or **F9** to **Quit**. You return to the command prompt.
10. Test the network connectivity using the normal tools process (Ping, dig, etc.).

APPENDIX C
Unzipping files using WinZip

This appendix describes the process for unzipping files using WinZip.

- Procedure 74

Procedure

To unzip a file using WinZip:

1. Open WinZip (You can also use 7-Zip or WinRAR).
2. Select **Options**, as shown in Figure 79 on page 74.

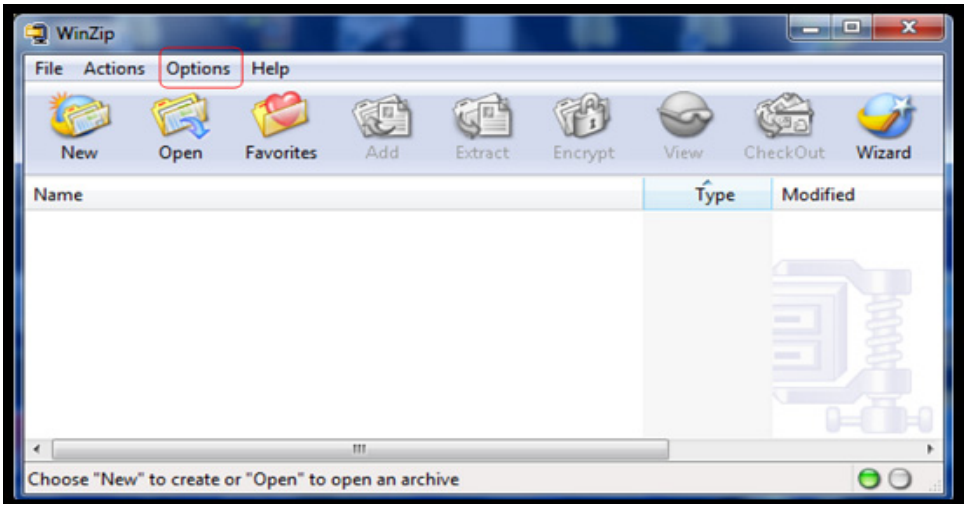

Figure 79 Selecting Options

3. Select **Configuration**, and then the **Miscellaneous** tab, as shown in Figure 80 on page 74.

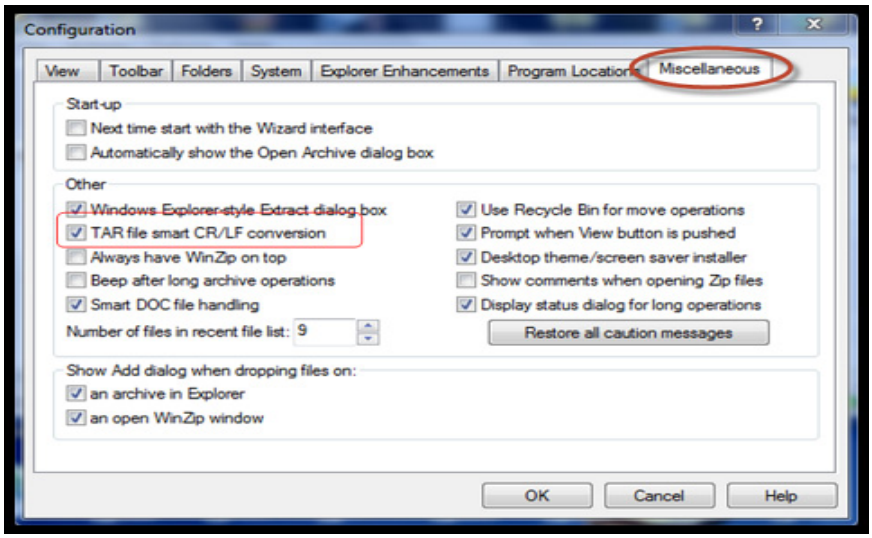

Figure 80 Selecting Miscellaneous tab

4. Clear the **TAR file smart CR/LF conversion** checkbox, and then click **OK**, as shown in Figure 81 on page 75. The box will remain unchecked until it is selected again, or WinZip is reinstalled.

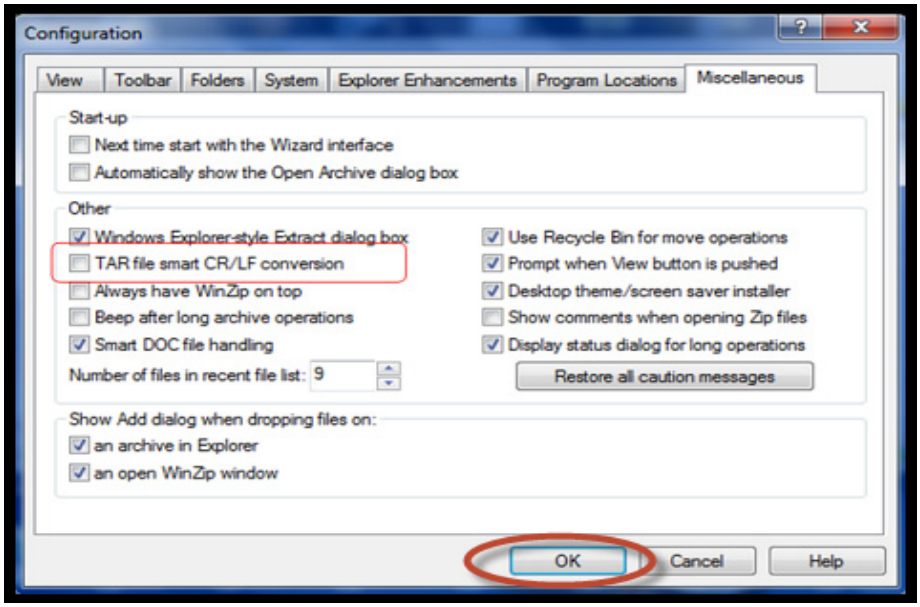

Figure 81 Clearing the TAR file smart CR/LF conversion checkbox

5. Unzip and import the data.

GLOSSARY

This glossary contains terms related to remote services and SRS.

A

access See *Remote Access*.

C

connect home Connecting from a remote site to Dell EMC's support network.

D

Dell EMC Online Support Site Web-based access on support.emc.com to documentation, downloads, and support information for Dell EMC customers and internal Dell EMC users.

DMZ Demilitarized zone — Device used to secure an internal network from unauthorized external access.

Dynamic IP address An address that is assigned by the access device by which the user's host connects over a dialup telephone line or by a set-top box for an IP over cable network.

F

failover The capability to switch over automatically to a standby server upon the failure or abnormal termination of the previously active server. Failover happens without human intervention and generally without warning.

firewall A hardware or software device that is configured to permit, deny, or proxy data through a computer network which has different levels of trust.

FTP File Transfer Protocol — Used to transfer data from one computer to another, over the Internet or through a network.

G

Gateway 2.x An SRS 2.x software component that is installed on a customer-supplied dedicated server (or servers) or VMware instance. The servers act as the single point of entry and exit for all IP-based Dell EMC remote notification and remote support activity.

P

Policy Manager An SRS software component that is installed on a customer-supplied server or servers. It enables customizable control of remote access to customer devices and maintains an audit log of remote connections.

proxy server A server (a computer system or an application program) which services the request of its servers by forwarding request to other servers. A server connects to the proxy server, requesting some service, such as a file, connection, web page, or other resource, available from a different server. The proxy server provides the resource by connecting to the specified server and requesting the service on behalf of the server. A

proxy server may optionally alter the server's request or the server's response, and sometimes it may serve the request without contacting the specified server.

R

remote access Communication with a processing device from a remote location through a data link.

S

SMTP Simple Mail Transfer Protocol — The de facto standard for email transmissions across the Internet.

SRS Secure Remote Services is an IP-based automated connect home and remote support solution enhanced by a comprehensive security system. SRS creates both a unified architecture and a common point of access for remote support activities performed on your Dell EMC products.

SRS Virtual Edition Secure Remote Services, Virtual Edition, which is installed on an ESX or Hyper-V Server, acts as the single point of entry and exit for all connect home and remote support activities

T

topology Network configuration, including firewalls, servers, devices, and ports used for communication between all devices.

Transport Layer Security (TLS) port A port that uses cryptographic protocols to provide secure Internet communications for data transfers.