

SupportAssist Enterprise Version 4.0

Pre-Site Checklist

Abstract

Use this template to help with the deployment of SupportAssist Enterprise in a customer environment. This form, together with the guidance of your Dell Technical Support agent, can help you gather the information and make the decisions that are needed to ensure success.

July 2019

Before you begin

Revisions

Date	Description
July 2019	Initial release
Jan 2021	Updated content based on feedback from Field Services

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1 Before you begin

SupportAssist Enterprise is a Dell solution that is customer-deployable using this checklist and the supporting documentation. We strongly recommend the involvement of:

- The customer lead to define which products will be monitored using SupportAssist Enterprise
- The customer IP networking team, to define how those products will securely connect to the backend

Customer to decide who will do the installation of the solution component(s):

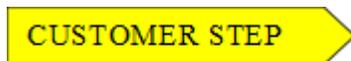
Installation	✓
Customer	<input type="checkbox"/>
Dell	<input type="checkbox"/>

If you prefer the Dell Field services team to deploy SupportAssist Enterprise and add devices to SupportAssist Enterprise this is available at no cost. To initiate this service, [open a Service Request](#) for deploying SupportAssist Enterprise. For more information, [click here](#).

Conventions used in this document:



Denotes a step that can be done by the customer or Dell partner or Dell Technical Support.



Denotes a step that can ONLY be done by the customer. For example, only the customer can define the root password.

2 Overview

Dell recommends the following step-by-step approach that is provided in this checklist:

Step 1 - Planning

- Download the SupportAssist Enterprise software and documentation
- Plan and prepare for deploying SupportAssist Enterprise and its networking access to Dell
- Plan the devices that will be monitored by SupportAssist Enterprise, preparation can wait until Step3
- Complete the checklist details

Step 2 – Installing and deployment

- Deploy SupportAssist Enterprise
- Install Policy Manager (optional, runs as application on a customer server)

Step 3 – Deploying

- Prepare the environment and network for your devices to connect to SupportAssist Enterprise
- Add devices to SupportAssist Enterprise
- Configure the device Connect-In and Connect-Home
- Register your deployed products with Dell Support

3 Download SupportAssist Enterprise software and documentation



SupportAssist Enterprise software and documentation is available on www.dell.com/supportassist.

Customers should run checks in accordance with their security policy after downloading or receiving SupportAssist Enterprise software packages.

The following is a summary of recommended documentation and software:

Table 1- Related documents

SupportAssist Enterprise Version 4.0 Documentation – www.dell.com/serviceabilitytools SupportAssist Enterprise Version 4.0 User's Guide SupportAssist Enterprise Version 4.0 Release Notes SupportAssist Enterprise Version 4.0 Support Matrix SupportAssist Enterprise Version 4.0 Technical Description Guide SupportAssist Enterprise Version 4.0 Alert Policy Guide SupportAssist Enterprise Version 4.0 REST API Guide SupportAssist Enterprise Version 4.0 Reportable Items SupportAssist Enterprise Version 4.0 Troubleshooting Guide
SupportAssist Enterprise Version 4.0 Software – www.dell.com/supportassist SupportAssist Enterprise Version 4.0 OVF image for VMWare ESX Systems ~2 GB SupportAssist Enterprise Version 4.0 VHD image for Microsoft Hyper-V Systems ~2 GB
SupportAssist Enterprise Version 4.0 Infrastructure information Dell KB# 79836 contains the host and IP address information of Dells Global access and enterprise server.
Optional SupportAssist Enterprise Software Policy Manager Software (Windows or Linux as required) ~100MB – Click here

4 Customer contact information


STEP

Record your contact information below.

Contact Information

Table 2 – Contact information

Item	
Customer Company	
Customer main contact name for this project	
Customer main contact phone + email	
SupportAssist Enterprise deployment Service Request (if known)	
Requested install date	
PS Project Number	

Party (Site) information – also available on [S360 Company Administration](#)

Table 3 – Party (Site) information

Function	Name	Party# (Site ID)	Locations
Primary			
Secondary (if applicable)			

Customer Contacts

Table 4 – Customer contacts

Type*	Name	Title/Role	Phone number	Email
Primary				
Technical				

* Primary and technical contacts can be entered during SupportAssist deployment and registration and shall then be available in the event of any issues.

5 SupportAssist Enterprise configuration choices

STEP

Select the proposed SupportAssist Enterprise configuration from the following table and note the number of virtual appliances that are required for the chosen configuration.

Some Dell devices have alternative “on-board” SupportAssist Enterprise solutions such as SupportAssist Enterprise Device Clients. For customers with fewer Dell devices these may be preferable.

Table 5 – SupportAssist Enterprise configuration choices

Configuration	✓
Single SupportAssist Enterprise*, no Policy Manager	<input type="checkbox"/>
Single SupportAssist Enterprise * and Standalone Policy Manager	<input type="checkbox"/>
High-Availability SupportAssist Enterprise(s)**, no Policy Manager	<input type="checkbox"/>
High-Availability SupportAssist Enterprise(s)** and Standalone Policy Manager	<input type="checkbox"/>

* Do not place SupportAssist Enterprise or storage files on Dell devices that are managed by SupportAssist Enterprise.

** HA SupportAssist Enterprise should run in separate customer virtual environments.

STEP

Examine the Dell products that are installed or pending install in the customer environment on [S360 Company Administration](#). Choose and list devices to be deployed in the [Customer devices to be monitored using SupportAssist Enterprise](#) section.

STEP

Some Dell products need an extra workstation with specific software to enable those products to Connect-Home to Dell. Workstations are customer-provided. Switch management software is customer installable and may incur a separate cost.

Table 6 – Device monitoring solution

Device Monitoring Solution	✓If to be installed	✓If already installed	✓If not required
Additional Connectrix Manager Workstation for Brocade Switch Monitoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional Fabric Manager Workstation for Cisco Switch Monitoring	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5.1 SupportAssist Enterprise and Policy Manager Details

STEP

Plan the various resources needed before deploying SupportAssist Enterprise. Server requirements for SupportAssist Enterprise can be found in the [SupportAssist Enterprise Version 4.0 User's Guide](#). Note that usernames and passwords are defined and held by the customer.

SupportAssist Enterprise appliance 1

Table 7 – Appliance 1

Item		Item	
Name or IP Address		VM or Hyper-V	
Enable failover FTPS (Y/N)*	No	Enable failover Email (Y/N)*	No
Policy Manager enabled? (Y/N)	No	Policy Manager Name or IP Address	

* Failover FTPS or email will attempt to forward Call home from devices to Dell if connectivity between the server on which SupportAssist Enterprise is deployed and the backend is lost. Recommended for single SupportAssist Enterprise configurations.

SupportAssist Enterprise appliance 2 (HA partner of appliance 1)

Table 8 – Appliance 2

Item		Item	
Name or IP Address		VM or Hyper-V	
Enable failover FTPS (Y/N)	No	Enable failover Email (Y/N)	No
Policy Manager enabled? (Y/N)		Policy Manager Name or IP Address	

Policy Manager Application (optional)

Table 9 – Policy Manager application

Item		Item	
Name or IP Address		Default Policy for Connect-in (allow/ask/refuse)	
Policy Manager Port		Policy Manager SSL (Y/N)	No

5.2 Customer proxy and email details

STEP

Provide details of the supporting resources needed before deploying SupportAssist Enterprise.

NOTE: Usernames and passwords are defined and held by the customer.

5.2.1 Customer proxy details

There are various instances in which a customer proxy server can optionally be used:

- (1) Between the server on which SupportAssist is deployed and the Internet
- (2) Between the server on which SupportAssist is deployed and the Policy Manager Application

Table 10 – Customer proxy details

Proxy Name or IP address	Proxy Functions (1 and/or 2)	Port#	Proxy Type Auto/HTTP/SOCKS	Username & Password available (Y/N)
				No
				No

5.2.2 Customer email server details

There are various ways in which a customer email server can be used. See the table “Types of email notifications” in the “SupportAssist Enterprise Version 4.x.x User's Guide”.

Table 11 – Customer email server details

Mail Server Name or IP address	Email functions	Sender email	Notification email to:
	SupportAssist Enterprise to internal		
	SupportAssist Enterprise to external (Call Home failover - optional)		
	Policy Manager to internal		

6 Network preparation

CUSTOMER STEP

The customer is responsible for configuring their network environment to support SupportAssist Enterprise. For information about the minimum network requirements, see the [SupportAssist Enterprise Version 4.0 User's Guide](#). For information about network port requirements, see the [SupportAssist Enterprise Version 4.0 Support Matrix](#).

Table 12 – Network preparation

Task	✓
Prepare Firewalls for Customer <> External Communication	<input type="checkbox"/>
Configure the external firewall rules to enable the server on which SupportAssist Enterprise is deployed to connect to the Dell Global access and enterprise servers on outbound ports 443 and 8443. For more information, see here .	<input type="checkbox"/>
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 for SupportAssist Enterprise. SSL checking causes connectivity loss to the backend. 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), there will be loss of connectivity to the backend.	<input type="checkbox"/>
Prepare Firewalls for SupportAssist Enterprise in Customer Network	<input type="checkbox"/>
Configure internal firewall rules to enable the server on which SupportAssist is deployed to connect to customer SMTP server to send notification to the customer, for example, Connect-Home failover notification.	<input type="checkbox"/>
Optionally, configure internal firewall rules to enable the Policy Manager to connect to customer SMTP server to send notifications to the customer.	<input type="checkbox"/>
Configure internal firewall rules to enable customer to connect to SupportAssist Enterprise on port 9443 for GUI Management and port 22 for CLI.	<input type="checkbox"/>
Optionally, configure internal firewall rules to enable communication between SupportAssist Enterprise and the Policy Manager on ports 8090 and/or 8443.	<input type="checkbox"/>
Configure internal firewall rules to enable communication between SupportAssist Enterprise and the device as defined in the SupportAssist Enterprise Version 4.0 Support Matrix . <i>(This step can be deferred until "Adding devices to SupportAssist Enterprise" to spread effort over time).</i>	<input type="checkbox"/>

7 Install Policy Manager

STEP

See the Policy Manager documentation for complete information. The customer is responsible for performing basic installation of the Policy Manager software at the time of deployment.

Table 13 – Install Policy Manager

Task	
	✓
Select a Policy Manager server or virtual machine with a compatible operating system.	<input type="checkbox"/>
Download latest Policy Manager software from here .	<input type="checkbox"/>
Install Policy Manager using the SRS Policy Manager Installation Guide .	<input type="checkbox"/>

8 Am I ready to deploy SupportAssist Enterprise?



These checks can be performed by enabled customer admins, partners, or Dell. Go to <https://onlinesupport.emc.com/CompanyAdminSites> for these checks.

Table 14 – Preparation to deploy SupportAssist Enterprise Version 4.0 – Virtual Edition

Task	✓
<p>Credential Check For customers a valid business enterprise account is required. You can create a business enterprise account while downloading SupportAssist Enterprise from www.dell.com/supportassist.</p> <p>For Dell and Service-Enabled Partners an active RSA Soft Fob is required.</p> <p>For non-servicing partners, ask the customer to enter their credential, or raise a Dell Service Request with details of the party number and devices to be deployed.</p>	<input type="checkbox"/>
<p>Installer Check Click Manage Sites and search for the Site ID. Click the Site ID and then Contacts. Select Web Support Enabled to filter the list.</p> <p>For customers the installing person must be listed as an Authorized Contact. If you are a customer and not listed as an Authorized Contact, contact support@emc.com</p> <p>For partners the installing person must be listed as a Support Partner. If you are a partner and not listed as a Support Partner, contact GSP_SSC_ESRS@emc.com.</p>	<input type="checkbox"/>
<p>Party Number Check Click View Sites to view your Company Site and the devices installed. If the devices cannot be added in SupportAssist Enterprise, you cannot deploy SupportAssist Enterprise.</p> <p>For the list of devices supported by SupportAssist Enterprise, see the SupportAssist Enterprise Version 4.0 Support Matrix.</p> <p>If no valid products are listed, use a different party number or contact Dell Support.</p>	<input type="checkbox"/>

9 Deploy SupportAssist Enterprise



Deploy SupportAssist Enterprise to the hypervisor environment (ESX or Hyper-V) and perform the basic virtual machine configuration.

Table 15 – Deploy SupportAssist Enterprise

<p>Task</p>	<p>✓</p>
<p>For information about deploying SupportAssist Enterprise, see “Deploying SupportAssist Enterprise” in the SupportAssist Enterprise Version 4.0 User’s Guide.</p> <p>NOTE: Create a root password at this step. Weaker passwords may be accepted but will not function in the next step. It is recommended to have a complex root password. The password may have a minimum eight characters with at least one uppercase and one lowercase letter, one number, one special character.</p> <p>The default keyboard in SupportAssist Enterprise is US English.</p>	<p><input type="checkbox"/></p>

10 Configure SupportAssist Enterprise

STEP

Use a supported browser to access the SupportAssist Enterprise user interface at “https://<SAE IP>:5700/SupportAssist”, where <SAE IP> is the IP address of the server on which SupportAssist Enterprise is deployed.

A Customer, Partner, or Dell can complete the registration. This connects the servers on which SupportAssist Enterprise is deployed with the Dell backend.

Table 16 – Configure SupportAssist Enterprise

Task	✓
Log in to SupportAssist Enterprise as per the “Log in to SupportAssist Enterprise” section in the SupportAssist Enterprise Version 4.0 User’s Guide . If SupportAssist Enterprise does not accept your login credentials check the current keyboard layout, the root password was probably entered in US English keyboard layout in the previous step.	<input type="checkbox"/>
Configure SupportAssist Enterprise as per the “Register SupportAssist Enterprise” section in the SupportAssist Enterprise Version 4.0 User’s Guide .	<input type="checkbox"/>
Customers: If you are building a SupportAssist Enterprise High-Availability cluster, please raise a Dell Service Request and provide the SupportAssist Enterprise Serial Numbers (for example ELMDKZW7RJSWDN and SHTESTREDSRZJK). Servicing Partners and Dell employees: Create the HA cluster at https://servicelink.emc.com .	<input type="checkbox"/>

11 Adding devices to SupportAssist Enterprise

STEP

Add Dell devices using the table on the next page as a reference.

Some devices must only be added to SupportAssist Enterprise from the device itself using the RESTful protocol. For more information, see the device configuration documentation.

Table 17 – Add devices to SupportAssist Enterprise

Task	✓
Prepare the environment and network for your devices to connect to SupportAssist Enterprise as defined in the SupportAssist Enterprise Version 4.0 Support Matrix .	<input type="checkbox"/>
Add the devices to SupportAssist Enterprise. For information about adding devices, see the “Adding Devices” section in the SupportAssist Enterprise Version 4.0 User’s Guide .	<input type="checkbox"/>
<p>Register each device with Dell:</p> <ul style="list-style-type: none"> • Dell employees use IBG for this • Implementing partners should use this process • Customers raise a Dell Service Request. <p>For each serial number, include the product login and password to be used by Dell for Connect-In, and if Connect-In and Connect-Home are enabled (default).</p>	<input type="checkbox"/>
To verify that the remote Connect-In to customer products is working correctly (Dell and Partners only).	<input type="checkbox"/>
<p>To verify that the remote Connect-Home from customer devices to the Dell backend is working correctly.</p> <ul style="list-style-type: none"> • Trigger a test Connect-Home from the device (see device documentation) • Validate that Dell backend received the test Connect-Home: <ul style="list-style-type: none"> - Dell employees use CLM - Implementing Partners and customers can use <a href="https://www.dell.com/support/home/en-us/product-support/serialnumber/<My serial number>/overview">https://www.dell.com/support/home/en-us/product-support/serialnumber/<My serial number>/overview <p>Connect-Homes are processed immediately by Dell Technical Support but may take a few hours to appear in the above separate Dell reporting systems. If you cannot find your initiated Connect-Home event after waiting some time, it is recommended that you open a Service Request to verify receipt of your test Connect-Home.</p>	<input type="checkbox"/>

12 Final steps

STEP

Check the SupportAssist Enterprise user interface for any updates and install the updates. For information about installing the updates, see the “Update SupportAssist Enterprise” section in the [SupportAssist Enterprise Version 4.0 User’s Guide](#).

Table 19 – Final steps

Task	✓
If you are using the Policy Manager, then check to ensure that the Windows Task Scheduler is running and unrestricted, so that Policy Manager backups can occur.	<input type="checkbox"/>

13 Notes and Comments

Table 20 – Notes and comments

Task	✓
	<input type="checkbox"/>
	<input type="checkbox"/>