

# Veritas NetBackup™ Self Service Installation Guide

8.3

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# Veritas NetBackup™ Self Service Installation Guide

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# Contents

Chapter 1	Introduction .....	6
	About Self Service components .....	6
Chapter 2	Prerequisites .....	8
	About prerequisites .....	8
Chapter 3	Installation .....	10
	Installation overview .....	10
	IIS considerations .....	11
	Install Portal .....	11
	Install Adapter .....	14
	Validation .....	15
	Installed components .....	15
Chapter 4	Upgrade .....	19
	Review current environment configuration .....	19
	Upgrade preparation .....	21
	Upgrade the Portal .....	22
	Upgrade the Adapter .....	23
	Validation .....	24
	Post upgrade resynchronization .....	26
	Post upgrade steps .....	26
	Rollback .....	27
Chapter 5	Post-installation validation .....	28
	About post-installation validation .....	28
	Visual Check .....	28
	Configuration Check .....	29
	Windows Service .....	30
Chapter 6	Uninstallation .....	31
	Uninstalling NetBackup Self Service .....	31

Appendix A	Software requirements .....	32
	NetBackup software requirements for Self Service .....	32
Appendix B	Troubleshooting .....	35
	About PowerShell execution policy .....	35
	Recovering a lost application key .....	37
Appendix C	Configuring HTTPS .....	38
	About configuring HTTPS .....	38
Appendix D	Load balanced installation .....	41
	About load-balanced installation .....	41
Appendix E	Customizing image upload .....	43
	About Customizing Image Upload .....	43
Appendix F	Reduced Database Permissions for Database Upgrade .....	45
	Reduced Database Permissions for Database Upgrade .....	45

# Introduction

This chapter includes the following topics:

- [About Self Service components](#)

## About Self Service components

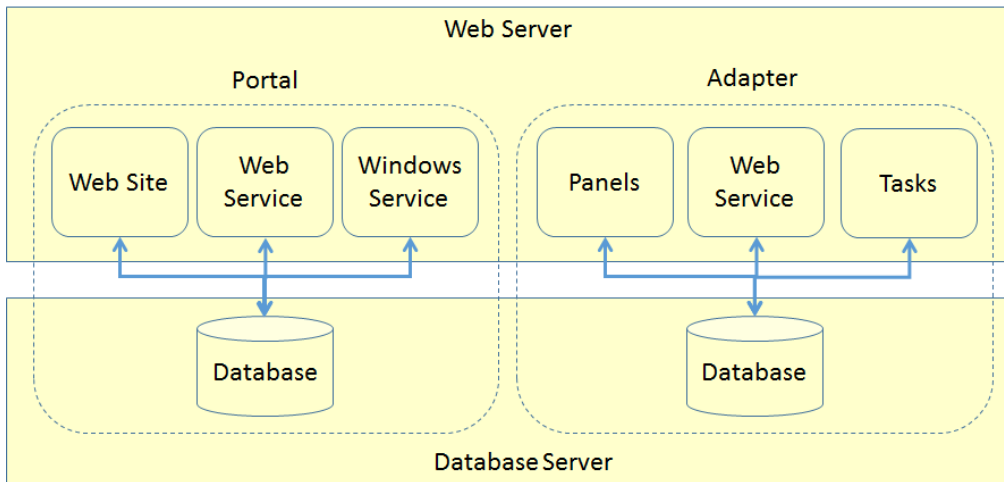
Two installers are required to install NetBackup Self Service:

- NetBackup Self Service Portal 8.3.exe
- NetBackup Self Service Adapter 8.3.exe

The installers install a total of eight components:

- Portal
  - Website
  - Web service
  - Windows Service
  - Database
- Adapter
  - Panels
  - Web service
  - Tasks
  - Database

You can distribute the components a number of different ways, but the focus of this guide is the two-server install. A web server that hosts the websites, web services and Windows Service, and a database server that hosts the databases.

**Figure 1-1** Two-server installation

You can extend your NetBackup Self Service solution by using one of the additional add-ons. You can find more information, as well as download details, on the Veritas Open Exchange (VOX). A link takes you to the specific post.

- Veritas NetBackup Self Service app for Mobile, available for both iOS and Android.  
<https://tinyurl.com/y7g56u2r>
- Veritas NetBackup Self Service bot for Microsoft Teams  
<https://tinyurl.com/ycqkhfzh>
- Veritas NetBackup Self Service app for Slack  
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- Veritas NetBackup Self Service plug-in for VMware vRealize Automation  
<https://tinyurl.com/ybldbpcx>
- Veritas NetBackup Self Service plug-in for VMware vCloud Director  
<https://tinyurl.com/y77f68jv>

# Prerequisites

This chapter includes the following topics:

- [About prerequisites](#)

## About prerequisites

The person who installs NetBackup Self Service needs a working knowledge of SQL Server, Windows Services, and Internet Information Services (IIS).

NetBackup Self Service can be installed on the following Windows platforms:

- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019

---

**Note:** Apply the latest service packs to the operating system.

---

The prerequisites for each component are:

**Table 2-1**

Component	Requirement
Database	<ul style="list-style-type: none"><li>■ Microsoft SQL Server 2012, 2014, 2016, or 2017</li><li>■ Azure SQL database or Microsoft SQL Server on Amazon RDS</li><li>■ At least 5 GB free disk space for data and 2 GB for logs</li></ul>



**Table 2-1** (continued)

Component	Requirement
Website, web service, and Windows Service	<ul style="list-style-type: none"><li data-bbox="655 326 1072 352">■ Microsoft .NET Framework version 4.7.2</li><li data-bbox="655 361 946 387">■ IIS installed by configurator</li><li data-bbox="655 395 1170 447">■ Microsoft PowerShell 3.0 part of standard Windows installation</li><li data-bbox="655 456 938 482">■ Access to an SMTP server</li><li data-bbox="655 491 962 517">■ At least 1 GB free disk space</li></ul>

# Installation

This chapter includes the following topics:

- [Installation overview](#)
- [IIS considerations](#)
- [Install Portal](#)
- [Install Adapter](#)
- [Validation](#)
- [Installed components](#)

## Installation overview

The Self Service installation is a multi-part installation. [Table 3-1](#) provides an overview of the process. Additionally, this chapter provides details on where the various Self Service components are installed.

**Table 3-1** Installation overview

Step	Additional information
IIS considerations	See <a href="#">“IIS considerations”</a> on page 11.
Https	See <a href="#">“About configuring HTTPS”</a> on page 38.
Install Portal	See <a href="#">“Install Portal”</a> on page 11.
Install Adapter	See <a href="#">“Install Adapter”</a> on page 14.
Validation	See <a href="#">“Validation”</a> on page 15.

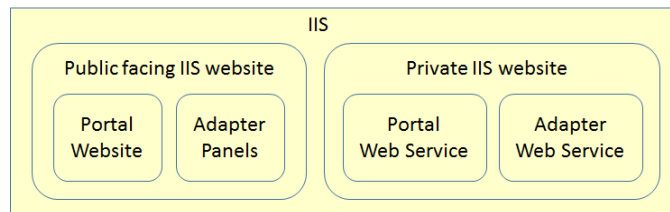
## IIS considerations

Before you begin installation, you should give some consideration to how you want to configure IIS. Four components are installed within IIS:

- Portal website
- Portal web services
- Adapter pages
- Adapter web services

The security considerations for these components are different. The portal website and adapter pages must be visible to all the users of the system. This requirement can mean exposing the website over the public Internet. The portal web services and adapter web service provide an integration point. Only internal systems need access to these pages.

The recommended configuration is to create two IIS websites for the components. The first IIS website hosts the portal website and adapter pages. The second IIS website hosts the portal web services and adapter web services.



Create two websites in IIS. The first is the public facing website to host the portal and the adapter panels. The second is the private website to host the web services. Configure the security of the IIS websites. Be sure to restrict the visibility of the private IIS website so that it is not exposed over the public Internet.

## Install Portal

This section describes the installation of the NetBackup Self Service Portal.

### To install the portal

- 1 Install the NetBackup Self Service Portal before the NetBackup Self Service Adapter.
- 2 Install the NetBackup Self Service Portal on the web server. The portal installation does create a database on a remote machine.

- 3 Run `NetBackup Self Service Portal 8.3.exe`.  
The installer runs and copies the installation onto the computer. When the installation completes, a configurator launches.
- 4 In the configurator select **Install a New NetBackup Self Service Portal**.
- 5 On the component screen, confirm that all options are selected and select **Next**.
- 6 A validation screen runs to check that IIS is configured correctly
- 7 Use the **New Install Configuration Options** dialog to specify the site configuration.

The screenshot shows a dialog box titled "NetBackup Self Service Portal" with a close button (X) in the top right corner. The main heading is "New Install Configuration Options" followed by the instruction "Please provide the following information." Below this, there are several configuration fields:

- Company Name:** An empty text input field.
- Portal Name:** A text input field containing "NetBackupSelfService".
- Install Portal as:** A dropdown menu with "IIS Application" selected.
- Portal IIS Website:** A dropdown menu with "Default Web Site" selected.
- Web Service IIS Website:** A dropdown menu with "Default Web Site" selected.
- System Base Currency:** A dropdown menu with "US Dollar (USD)" selected.
- System Base Language:** A dropdown menu with "English (US)" selected.

At the bottom of the dialog, there are three buttons: "Cancel" on the left, and "Back" and "Next" on the right.

- The **Company Name** is the name of your company.
- The **Portal Name** field defines the name of the site. It is used to create the names of the **IIS Applications** and Windows service the installer creates. The portal name cannot be changed once the installer runs. Choose the **Portal Name** carefully.
- The **Install Portal as** field gives you the option to install the main website in an IIS application or directly under the website root. If you install in an IIS application the URL is similar to `www.example.com/portalname`, where

*portalname* is the **Portal Name**. If you install in the root of the IIS website, the URL of the website is similar to `www.example.com`.

The advantage of installing in an IIS application is that other websites can co-exist on the web server. The advantage of installing under the root of the website is a more attractive URL.

- Specify the IIS website where you want the components installed. Select the IIS website you want to use for the portal and the web services. Veritas recommends that you use two websites. Use **Public** to host the portal and **Private** to host the web services.
  - **System Base Currency** defines the currency type that Self Service uses.
  - The **System Base Language** defines the language that is displayed in the user interface.
- 8** On the **Database Installer Connection** dialog, enter information about the database to be created, and the credentials to use while creating the database. Veritas recommends that you keep the default database name, which is the same as the **Portal Name**. The credentials provided must exist and have `sysadmin` access to the database instance. The credentials are used by the installer to create the database.
- 9** Enter the user credentials that the portal, web service and windows service use to connect to the database. This database user is created as part of the install process, and is used by the application to connect to the database.
- 10** Generate a new **Application Key** in the **Application Security** dialog.

The **Application Key** is used to encrypt third party passwords in the system. For example, the adapters contain credentials for connecting to other systems and the application key is used to encrypt them. If the installation is for a new system, click **Generate Key** to create a new key. If the installation is for a new component for an existing system, paste the key from the original installation into the box.

If you intend to install a second website to load-balance the system, keep a copy of the application key. You must use the same application key when you install the second website.

---

**Caution:** The application key is not used to encrypt the user's logon credentials.

---

- 11** A validation screen runs to check that the database credentials are correct.

- 12 A confirmation screen is presented. Confirm that the details are correct and click **Install**.
- 13 On completion of the installation and configuration of the portal, log into to the website.

The final page of the configurator contains the URL for the website. The credentials for initial logon are:

User ID: `Admin`. The user ID is not case sensitive.

Password: `password`. The password is case-sensitive. You are required to change the password at first logon.

Keep a copy of the URL from this final screen. Use this URL to connect to the system.

## Install Adapter

This section guides you through the installation of the NetBackup Self Service Adapter

### To install the adapter

- 1 From the web server, run `NetBackup Self Service Adapter 8.3.exe`. The installer runs and copies the installation files onto disk. When it completes, the configurator launches.
- 2 Select **Install NetBackup Self Service Adapter** from the **Select Installation** dialog box.
- 3 Confirm that all options are selected in the **Select Components** dialog and select **Next**.
- 4 A validation screen runs, to check that PowerShell 3.0 or later is installed.
- 5 On the **Select Portal Web Service** screen, specify the **Portal Web Service Virtual Root** for your system. The adapter communicates with the portal by the portal's web services.
- 6 Select the IIS websites where you want to install the adapter pages and adapter services in the **Select IIS Websites** dialog. Veritas recommends that the pages are on a public site and the services are on a private site.

- 7 The **Database Installer Connection** dialog is used to create the database for the adapter. Select the database server where the database is created and choose a name for the database. Veritas recommends that you accept the default database name, which is derived from the **Site Name** of the portal. The credentials that are entered are used to create the database. The user that is specified must have the `sysadmin` database privilege. This user is only used while the configurator is active and the credentials are not stored.
- 8 Create a database user which the adapter pages and services can use to connect the database on the **Application Connection** dialog.
- 9 A validation screen runs to check that the database credentials are correct.
- 10 A confirmation screen is presented. If the details are correct, click **Install**.
- 11 The installation runs.

## Validation

When the installation completes, log into to the website with the URL and credentials from the final screen of the portal installation. More information on how to validate the installation and perform the initial setup is available.

See [“About post-installation validation”](#) on page 28.

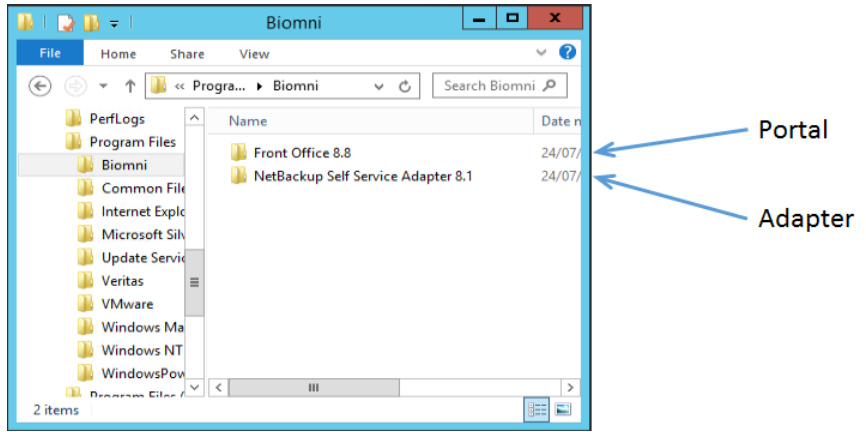
## Installed components

This section shows the result of a default installation of NetBackup Self Service. It shows the components that are installed and where they are installed.

### File System

The portal and the adapter are installed under `C:\Program Files\Biomni`.

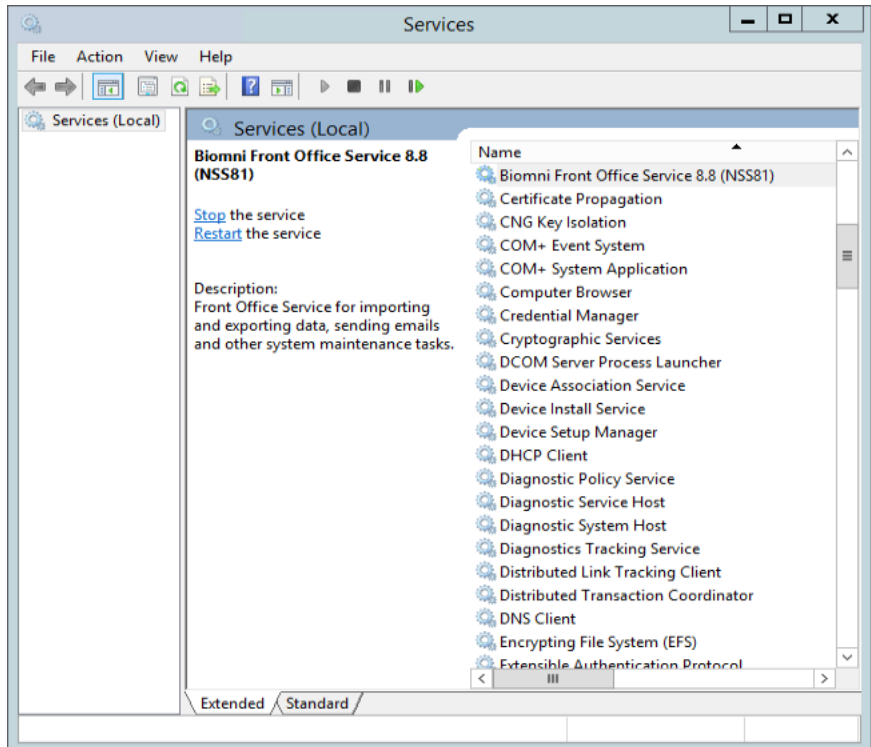
- **Portal:** `C:\Program Files\Biomni\Front Office version_number`
- **Adapter:** `C:\Program Files\Biomni\NetBackup Self Service Adapter version_number`



## Windows Service

The portal installs a Windows Service.

**Figure 3-1** Portal Windows Service

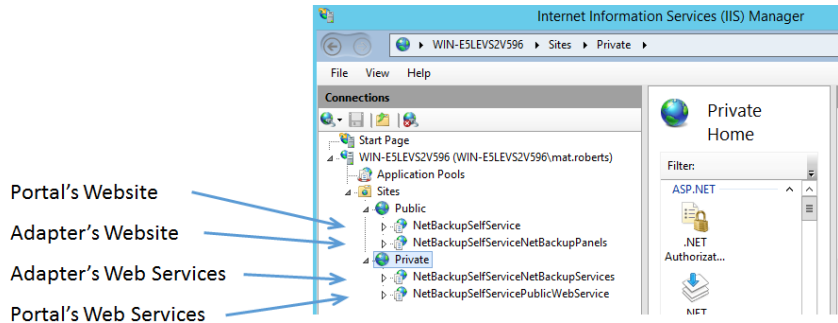




## IIS

Four components are installed in IIS. The figure shows the recommended configuration. In this configuration, two IIS websites are created: a public site to host the webpages and a private site to host the web services.

**Figure 3-2** Installed IIS components

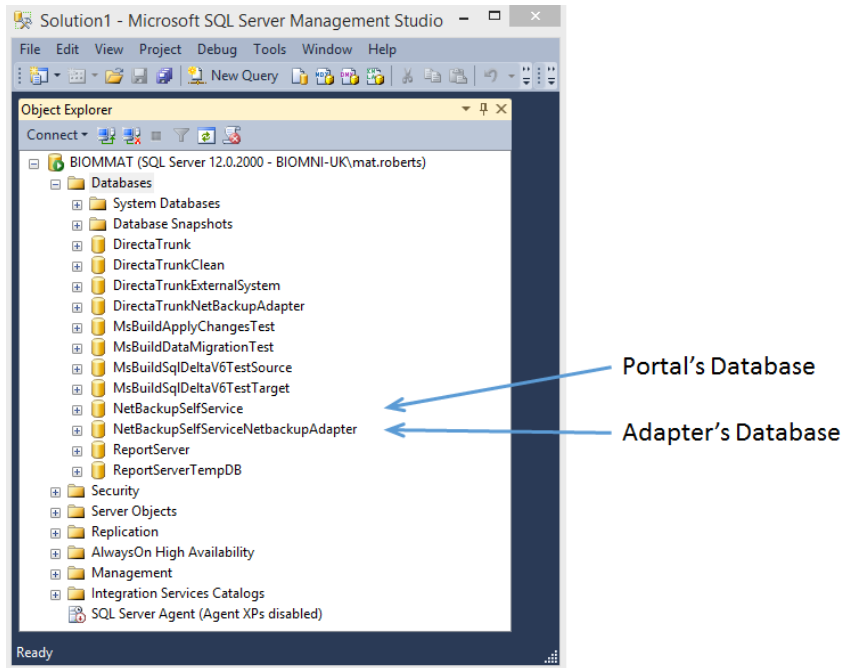


## Database

Two databases are created.

- Portal's database: **NetBackupSelfService**
- Adapter's database: **NetBackupSelfServiceNetBackupAdapter**

**Figure 3-3** Self Service Databases



# Upgrade

This chapter includes the following topics:

- [Review current environment configuration](#)
- [Upgrade preparation](#)
- [Upgrade the Portal](#)
- [Upgrade the Adapter](#)
- [Validation](#)
- [Post upgrade resynchronization](#)
- [Post upgrade steps](#)
- [Rollback](#)

## Review current environment configuration

Before you begin the upgrade, review existing installation. Self Service has eight components that are typically distributed across two servers.

**Table 4-1** Typical Self Service configuration

Location	Component
IIS server	<ul style="list-style-type: none"><li>■ Portal website</li><li>■ Portal public web service</li><li>■ Adapter panels</li><li>■ Adapter web service</li></ul>

**Table 4-1** Typical Self Service configuration (*continued*)

Location	Component
Windows services	<ul style="list-style-type: none"> <li>■ Portal Windows service</li> <li>■ Adapter Tasks (Self Service 7.7.3 and later)</li> </ul>
SQL server	<ul style="list-style-type: none"> <li>■ Portal database</li> <li>■ Adapter database</li> </ul>

You can identify the components in your environment from within NetBackup Self Service.

- Determine the servers where the portal components are installed by examining the configuration check page in the Self Service website.  
 Log into Self Service and navigate to the configuration check page (**Admin > Support > Configuration Check**).

**Configuration Check** Close

Your license 'NetBackup Self Service' will expire on Friday, September 22, 2017

Server Base Settings Email Reporting Search Caching

Windows Service Clear Windows Service Records Refresh This Page

Machine Name	Windows Service	Job	Last Update	Number Tasks Executed	Watchdog	Heartbeat	Status
CONSWEB	DirectaService8.SSNSS81	Internal Workflow	7/24/2017 4:18:34 PM	N/A	Alive	Alive	Started
CONSWEB	DirectaService8.SSNSS81	Scheduler	7/24/2017 4:18:34 PM	N/A	Alive	Alive	Started
CONSWEB	DirectaService8.SSNSS81	Task Engine	7/24/2017 4:18:34 PM	111	Alive	Alive	Started

Custom Task Plugins Edit

Machine Name	Name	Folder Path	Status	Information
CONSWEB	Netbackup Self Service Tasks	C:\Program Files\Biomni\NetBackup Self Service Adapter Trunk\NetBackupAdapterTasks\bin	Loaded	Tasks: 35 found, 35 loaded NetBackupAdapterBusinessObjects (7.0.6414.26193)

Database

Database Version: 8.8.0000  
 Latest Database Change: 880033  
 Latest Data Migrations: NetBackupSelfService: 70002

Web Server

Web Server: CONSWEB  
 Web Root Address: http://CONSWEB.uk.biomni.com/NSS81/ Edit  
 Recommend using the HTTPS protocol for the web site  
 Based on the URL in your address bar, the Web Root Address should be: http://conswEB.uk.biomni.com/NSS81/

Public Web Service

Public Web Services URL: http://CONSWEB.uk.biomni.com/NSS81PublicWebService/ Edit  
 Recommend using the HTTPS protocol for the public web service

	Assembly Version	Assembly Build Date	Database Service	Database	Application Encryption
Web Site	8.8.6414.21672	7/24/2017 1:02:24 PM	CONSSQL	NSS81	OK
Public Web Service	8.8.6414.21672	7/24/2017 1:02:24 PM	CONSSQL	NSS81	OK
CONSWEB\DirectaService8.SSNSS81	8.8.6414.21672	7/24/2017 1:02:24 PM	CONSSQL	NSS81	OK

Identify the servers where the components are installed.

- Identify the IIS components.  
Log into the web server and open **Internet Information Services (IIS) Manager**. Browse the sites and identify the four IIS components that are listed in [Table 4-1](#). See [Figure 3-2](#) on page 17.
- Identify the Windows service.  
Log into the server with the Windows Service. In a default installation of Self Service, the service is located on the web server. Open **Services** and locate the **Portal Windows Service**. See [Figure 3-1](#) on page 16.
- Identify the databases.  
Open Microsoft SQL Server Management Studio, and connect to the database server.  
Identify the two databases that are listed in [Table 4-1](#).  
See [Figure 3-3](#) on page 18.

## Upgrade preparation

You must perform several steps to prepare for an upgrade.

### To prepare for an upgrade

#### 1 Back up the databases

You should back up both Self Service databases before you start the upgrade. The default names for the databases are **NetBackupSelfService** and **NetBackupSelfServiceNetBackupAdapter**. Perform these steps in **SQL Server Management Studio**.

- Make a note of the **NetBackupSelfService** database recovery model.
- Set the database recovery model to **Simple**.
- Back up the database.
- Make a note of the **NetBackupSelfServiceNetBackupAdapter** database.
- Set the database recovery mode to Simple.

- Back up the database.
- 2 Take the portal offline.

Veritas recommends that you prevent user logon and user activity while the upgrade is active. The best way to prevent user logon and user activity is to use **Internet Information Services (IIS) Manager** to stop the application pool for the portal website.

If a user attempts to connect to the website when the application pool is stopped, they receive an HTTP Error 503. The service is unavailable error in their web browser.

Do not stop the other application pools during the upgrade. If you stop the application pools with the suffix **PublicWebServiceAppPool** then the upgrade fails. The public web service is used for the upgrade.

## Upgrade the Portal

### To upgrade the portal

- 1 On the web server, run the installer `NetBackup Self Service Portal 8.3.exe`.  
  
The installer runs and copies the installation to the computer. When the installation completes, a configurator launches.
- 2 Select **Upgrade a NetBackup Self Service Portal** in the configurator and click **Next**.
- 3 Confirm that all components are selected in the **Select Components** dialog and click **Next**.
- 4 A validation page runs to confirm IIS is configured correctly.
- 5 Choose the correct **Website Virtual Root** and **Web Service Virtual Root** websites for upgrade.  
  
Be sure that you select the correct websites for upgrade. In a default Self Service installation the four websites are named as follows:
  - **NetBackupSelfService** - website virtual root
  - **NetBackupSelfServiceNetBackupPanels** - do not choose this website
  - **NetBackupSelfServiceNetBackupServices** - do not choose website
  - **NetBackupSelfServicePublicWebService** - web service Virtual Root
- 6 Select the correct Windows service to upgrade.

- 7 On the **Upgrade Database** dialog box, choose the database you want to upgrade and supply credentials to connect to the database.

The database user who performs the upgrade must have the `sysadmin` Server Role. This user is only used during the upgrade process and is not stored once the configurator is complete.

If your database administrator does not want to grant the `sysadmin` role to you, you can perform a database upgrade with a reduced permission set. More information is available.

See [“Reduced Database Permissions for Database Upgrade”](#) on page 45.

- 8 On the confirmation screen, confirm that all the parameters that are entered are correct. Click **Install**.
- 9 The configurator upgrades the portal.

## Upgrade the Adapter

### To upgrade the adapter

- 1 On the web server, run the installer `NetBackup Self Service Adapter 8.3.exe`.  
  
The installer runs and copies the installation onto the computer. When the installation completes, a configurator launches.
- 2 Select **Upgrade NetBackup Self Service Adapter** in the configurator and click **Next**.
- 3 Leave all the options selected on the **Select Components** dialog box and click **Next**.
- 4 A validation screen runs, to confirm that PowerShell is installed and enabled.
- 5 Select the correct **Portal Panels Virtual Root** and **Web Services Virtual Root** websites that you want to upgrade.
- 6 A validation screen runs to confirm that you can connect to the portal web services and that the portal has been upgraded.

- 7 On the **Upgrade Database** dialog box, choose the adapter database you want to upgrade and supply credentials to connect to the database.

The database user who performs the upgrade must have the `sysadmin` Server Role. This user is only used during the upgrade process and is not stored once the configurator is complete.

If your DBA does not want to grant the sysadmin role to you, you can do a database upgrade with a reduced permission set. More information is available.

See [“Reduced Database Permissions for Database Upgrade”](#) on page 45.

- 8 A validation screen runs, to confirm that you can connect to the database
- 9 A confirmation screen is presented. Check the parameters are correct and then click **Install** to run the upgrade.

## Validation

### To validate the upgrade:

- 1 Start the portal application pool to bring the website online.
- 2 Log into the portal.
- 3 Perform the validation steps to confirm correct installation.  
See [“About post-installation validation”](#) on page 28.
- 4 Confirm that the license is correct.

### Check license and check request type codes for changes

Request types are used to perform actions within NetBackup Self Service. The NetBackup Self Service license specifies that you can use a maximum of 22 active request types. By default, after upgrade the system has 17 request types. You can view the request types in Self Service on the website in **Admin > Request & Approval > Request Type**.

Request types are split into two broad categories which relate to the main dashboards' solution. The categories are: request types that cannot be deactivated and default request types.

**Table 4-2** Request types which cannot be deactivated

Name	Code
Add Tenant	NEWTENANT
Add vCloud Director Import	NEWVCLLOUD



**Table 4-2** Request types which cannot be deactivated (*continued*)

Name	Code
New Computer User	NEWMACUSER
Set vCloud Director Password	VCLOUDPWD

**Table 4-3** Default request types associated with the dashboard end-user actions

Name	Code
Backup Now	DBBACKUPNOW
Protect	DBNEWBACK
Restore File	ALFRORIG
Restore File	DBRESTFILE
Restore File to Alternate VM	ALFRALT
Restore Virtual Machine	DBRESTVM
Restore Cloud Asset	DBRESTCLD
Unprotect	DBREMBACK
Restore Oracle Backup	DBRESTORA
Restore SQL Database	DBRESTSQL
Register VM for File Restore	DBREGDNS
Restore VM Disks	VMDISKREST

Confirm that all of the request types in [Table 4-2](#) and [Table 4-3](#) are active.

As part of the upgrade, the current versions of these five request types are installed. The existing request types are exported to disk and stored in the `install_location\MsBuild\DataExport` directory. The **Integration Settings** and **Action Request Types** section is reset to the default request types. Review any locally customized request types and update or replace the new request type as appropriate.

These are the only request types currently used in NetBackup Self Service by default. Any other shipped request types are deactivated on upgrade. Confirm their status in **Admin > Request & Approval > Request Type**.

# Post upgrade resynchronization

After the upgrade, manually resynchronize the data between NetBackup and the vCloud Director, if used. Two scheduled tasks run once per day: System Sync and Asset Import. System Sync imports any new backup images from all master servers, expires old backup images, and calculates usage. Until these tasks are run, the data that is displayed to the user may be incomplete.

## To resynchronize the data

- 1 Log in to the website as an administrator, and navigate to the **Monitoring** tab. The left side of the screen shows scheduled tasks.
- 2 Click the cog next to the **System Sync** task and select **Run Now**.
- 3 (Conditional) If you use vCloud Director, click the cog next to the **Asset Import** task, and select **Run Now**.
- 4 The **Activity** section on the right side of the screen monitors the progress of these tasks.

If you do not perform these steps manually, the tasks run automatically overnight.

# Post upgrade steps

As part of the upgrade, the two databases were backed up and the recovery mode was set to **Simple**. Revert the database's recovery mode to its initial value.

## To revert the database to its initial value:

- 1 Shrink both databases.
- 2 Set the recovery mode of the databases back to its original value.

When an upgrade is performed a new set of code is placed in a new location on the server. Once the upgrade is complete, remove the old installation.

## To remove old installation code

- 1 Go to **Add/Remove Programs**.
- 2 Uninstall any previous versions of:
  - **NetBackup Self Service Portal**
  - **NetBackup Self Service Adapter**

# Rollback

To revert back to the previous version, a restore of the two NetBackup Self Service databases is required. Additionally, you must reinstall the previous portal and adapters or restore their web server from a backup).

If you reinstall the portal and the adapters, ensure **Database** is not selected on the **Select Components** dialog box during install. In both cases the database is restored and does not need to be reinstalled.

During the portal reinstallation, when prompted for an application key, enter the application key from the previous installation. This application key is the key used to encrypt third party passwords in the restored databases and was recorded when the previous version was deployed.

# Post-installation validation

This chapter includes the following topics:

- [About post-installation validation](#)
- [Visual Check](#)
- [Configuration Check](#)
- [Windows Service](#)

## About post-installation validation

When you complete the installation, you can validate the installation with a series of checks.

**Table 5-1** NetBackup Self Service validation checklist

Validation	Additional details
Perform a visual check of the website main screen.	See " <a href="#">Visual Check</a> " on page 28.
Perform a configuration check of the NetBackup Self Service components.	See " <a href="#">Configuration Check</a> " on page 29.
Confirm the Windows service is configured correctly.	See " <a href="#">Windows Service</a> " on page 30.

## Visual Check

After installation it is important to check that the system has installed correctly. Log on to the portal website. The main screen of the website should display correctly.

# Configuration Check

After installation, check that the system is configured correctly with the **Configuration Check** screen (**Admin >Support > Configuration Check**).

## Server Tab

- **Windows Service:** Shows the status of the Windows services that are connected to the Self Service database. Each Windows service writes heartbeat information into the database every 5 minutes. If the database has not received a heartbeat within 7 minutes the service is highlighted in red.

If the environment is an upgrade, you may need to click the **Clear Windows Service Records** hyperlink. You may have references to previous installations in red text with a status of **Stopped**.

You can configure the system with multiple Windows services connected to a single database, which is a useful configuration for redundancy. Each Windows service writes three records into the Windows service table, so if for example there are two Windows services, six records are displayed.

- **Custom Task Plugins:** Shows the custom tasks that are plugged into the task engine. The table has one row for NetBackup Self Service Tasks. The status of the tasks is **Loaded**.
- **Database:** Shows the database version and most recent database change. These fields are useful in support scenarios.
- **Web server:** The critical field is the **Web Root Address**. This field should be the URL of the home page of Self Service, as seen by a user of the system. This setting is used when you construct emails with hyperlinks into NetBackup Self Service.
- **Public web service:** If the Public web service URL is incorrect the webpage displays an error message.
- **Table:** The table that is displayed at the bottom of the page shows the version numbers, connection strings, and application encryption status of all the components in the system. All of the version numbers and connection strings must match; if they do not an error message is displayed. If the application key is incorrect, the application encryption status indicates this problem, and an error is displayed.

## Base Settings Tab

Check that the base settings for Self Service are appropriate:

- **System Language** - US-English is the only supported language option.

- **System Time Zone** - choose a time zone which is an acceptable default for the majority of users
- **Image Upload** - Click the image icon to open the Image Manager. The Image Manager should list the `UploadedImages` folder. Select the `UploadedImages` folder and click **upload**. Browse to an image file and upload the file. If the file is successfully uploaded, the image appears on the right-hand side of the Image Manager dialog.

## Email Tab

- To configure SMTP settings for outbound email, click **Edit SMTP Settings**.
- Review core email addresses for the system.
- Send test email. Click **Send Test Email** to send a test email from the Self Service system. For the email to be sent, a Windows service must be active, the email task must be enabled, and the SMTP settings must be correct.
- Check the email queue. To view queued emails click **Email Queue**. The email queue shows any errors that are encountered with sending the email. When the mail is sent successfully it is removed from the queue.

# Windows Service

After an install, it is advisable to check that the Windows service is running correctly. On the server where the Windows service is installed:

- Open Event Viewer, and navigate to the Application Log.
- Find messages with a source of **DirectaService9.1\$FrontOffice**. The name may vary slightly - the naming convention is **DirectaService9.1\$SiteName**, where *SiteName* is the name of the website.
- If the Windows service has logged any errors then it is possible there is a configuration problem. Examine the detail of the error.

A common configuration problem is the Windows service cannot connect to the database. The Windows service checks to confirm that connectivity to the database is defined in the configuration file. If the service cannot connect to the database it logs an error in the Windows Event Log.

# Uninstallation

This chapter includes the following topics:

- [Uninstalling NetBackup Self Service](#)

## Uninstalling NetBackup Self Service

The uninstallation process removes the Windows service, the website, and the public web service that are connected to the installation location. It then deletes the software on the hard disk and the **Start Menu** shortcut.

The uninstallation does not delete the two databases that were created. The databases must be deleted manually.

### To uninstall a NetBackup Self Service

- 1 Determine the version of NetBackup Self Service you want to uninstall.
- 2 In Windows open **Programs and Features**.
- 3 Locate **NetBackup Self Service Adapter version**, and select uninstall.
- 4 Locate **NetBackup Self Service Portal version**, and select uninstall.

When the uninstall process finishes, delete the databases from within SQL Server Management studio. From **Object Explorer**, expand the **Databases** node. Right-click on each of the relevant databases and select **Delete**.

# Software requirements

This appendix includes the following topics:

- [NetBackup software requirements for Self Service](#)

## NetBackup software requirements for Self Service

NetBackup 8.0 or above with the latest service pack is required. With a Windows master server, only US English operating system and code page installations of NetBackup are supported. NetBackup language packs are not supported.

With a UNIX master server, the character encoding of the master server operating system must be UTF-8. Multiple locales are supported. NetBackup language packs are supported.

NetBackup appliances are supported.

### Software requirements for Self Service

The Self Service software requirements are

- If using a vCloud Director Integrated configuration, please check the Software Compatibility List for supported API versions.
- NetBackup Self Service works on any virtual platform, such as Hyper-V or vSphere, provided one of the supported operating systems is installed.

The following tables define the supported operation systems, SQL servers, and web browsers. The latest service pack should always be used.



**Table A-1** Supported operating systems

Server operating systems	Recommended	Supported	Not supported
Windows Small Business Server			X
Windows Server 2008 (32-bit and 64-bit)			X
Windows Server 2008 R2			X
Windows Server 2012			X
Windows Server 2012 R2	X		
Windows Server 2016	X		
Windows Server 2019	X		

**Table A-2** Support SQL server

SQL Server (32/64bit)	Recommended	Supported	Not supported
SQL Server 2008			X
SQL Server 2008 R2			X
SQL Server 2012	X		
SQL Server 2014	X		
SQL Server 2016	X		
SQL Server 2017	X		
Azure SQL database	X		
SQL Server on Amazon RDS	X		

**Table A-3** Supported browsers

Client Browsers	Recommended	Supported	Not supported
Internet Explorer 9			X

**Table A-3** Supported browsers (*continued*)

<b>Client Browsers</b>	<b>Recommended</b>	<b>Supported</b>	<b>Not supported</b>
Internet Explorer 11	X		
Edge	X		
Firefox	X		
Chrome	X		
Safari		X	

# Troubleshooting

This appendix includes the following topics:

- [About PowerShell execution policy](#)
- [Recovering a lost application key](#)

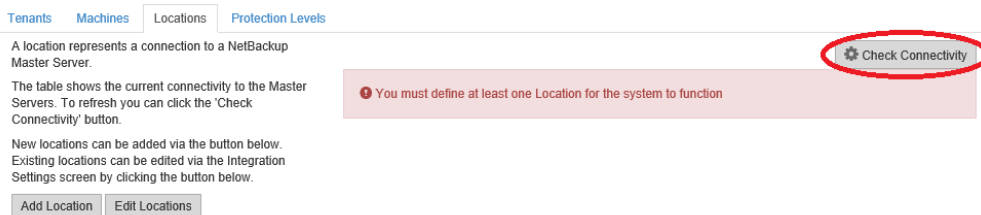
## About PowerShell execution policy

The PowerShell execution policy determines if PowerShell can run scripts. The installer sets the execution policy to **Remote Signed** which allows scripts to run. Problems are encountered if this step of the installer fails or the execution policy is changed after install. This appendix describes diagnosing and solving execution policy issues.

### Diagnosis

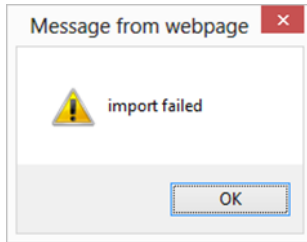
- Log on to the website
- Click the **Location** tab.
- Click the **Check Connectivity** icon

**Figure B-1** Check connectivity



If you receive the error message shown, there may be an execution policy issue. If **Check Connectivity** does not generate an error, the execution policy is set correctly.

**Figure B-2** Import failed pop-up box



To confirm there is an execution policy issue, navigate to the error log. Select **Admin > Support > Error Log** and examine the errors. An example of an execution policy issue is shown.

```
"CreateRequest failed with error:
File C:\Temp\NetBackupAdapter\NetBackupAdapterServices\PowerShellScripts\
ValidationHook\Initial.p s1 cannot be loaded because running scripts is
disabled on this system. For more information, see about_Execution_Policies
at http://go.microsoft.com/fwlink/?LinkID=135170. File C:\Temp
\NetBackupAdapter\NetBackupAdapterServices\PowerShellScripts\ValidationHook\
Initial.p s1 cannot be loaded because running scripts is disabled on this
system. For more information, see about_Execution_Policies at
http://go.microsoft.com/fwlink/?LinkID=135170."
```

## Solution

- 1 Log on to the web server
- 2 Open a PowerShell command prompt as administrator.
- 3 Type: `Get-ExecutionPolicy -List`  
 The list of the current execution policies is shown
- 4 If the **Local Machine Scope** is not set to **Remote Signed**, type the command:

```
Set-ExecutionPolicy -Scope LocalMachine -ExecutionPolicy
RemoteSigned
```

Execution policy scope treats items higher up the list as higher priority, overriding those lower in the list. If the scope **MachinePolicy** is set to **Restricted**, then even though **LocalMachine** is set to **RemoteSigned** you are still unable to run scripts. This Stack Overflow post describes how to solve such problems.

<http://stackoverflow.com/a/27755459>

## Recovering a lost application key

The application key is critical to the correct operation of the system. If the application key is lost it is not possible to recover the third party passwords. Logging on is unaffected but passwords for adapters and integration settings must be re-entered.

In practice, there are two ways the application key can be lost:

- The web server fails
- The website is uninstalled

To mitigate the first issue, a backup of the web server should be kept.

An example of the second issue is the need to move the web server to a different physical computer. The application key should be copied from the configuration file on the old server and the new website should be installed using the application key. Test that the new server works correctly and verify that there is a valid backup of the server. Once the installation is complete, uninstall the website from the old server.

The application key, as well as the database connections strings, are stored in an encrypted section of the configuration files for the components. Two scripts are available to decrypt and encrypt the configuration files:

- `install_location\MsBuild\ConfigEncrypt.bat`
- `install_location\MsBuild\ConfigDecrypt.bat`

The files that are encrypted and decrypted are:

- `install_location\WebSite\web.config`
- `install_location\PublicWebService\web.config`
- `install_location\ServiceHost\DirectaSvcHost.exe.config`

# Configuring HTTPS

This appendix includes the following topics:

- [About configuring HTTPS](#)

## About configuring HTTPS

You can provide additional security by configuring the websites to use secure web browsing (HTTPS). If secure web browsing is required, it is simpler to configure after installation.

Self Service is composed of a portal and an adapter, which must talk to each other over HTTP or HTTPS. When you want to configure HTTPS, these system URLs must be edited and changed to HTTPS.

The NetBackup Self Service Configurator contains a wizard, which lets you edit and validate all of the system URLs in a single place.

### Components of a URL

`https://devfo1.uk.biomni.com:444/NetBackupSelfServiceNetBackupServices/FlexiField.svc?wsdl`

The diagram illustrates the components of the URL `https://devfo1.uk.biomni.com:444/NetBackupSelfServiceNetBackupServices/FlexiField.svc?wsdl`. Brackets below the URL identify the following parts: **scheme** (https://), **hostname** (devfo1.uk.biomni.com), **port** (:444), **path** (/NetBackupSelfServiceNetBackupServices/FlexiField.svc), and **query** (?wsdl).

**Table C-1** How to configure an IIS website with HTTPS

Step	Action	Process
1	Import the SSL certificate into IIS.	<p><b>1</b> In a production system, an SSL certificate must be sourced from a certificate provider such as Verisign. You must import the certificate into IIS. More information is available.  <a href="https://technet.microsoft.com/en-us/library/cc731014(v=ws.10).aspx">https://technet.microsoft.com/en-us/library/cc731014(v=ws.10).aspx</a></p> <p><b>2</b> For a test system, a self-signed certificate can be created in IIS. More information is available.  <a href="https://technet.microsoft.com/en-us/library/cc753127(v=ws.10).aspx">https://technet.microsoft.com/en-us/library/cc753127(v=ws.10).aspx</a></p>
2	Configure the website to use secure browsing.	<p><b>1</b> In IIS, navigate to the website where you want to install Self Service.</p> <p><b>2</b> Right click and select <b>Edit Bindings</b>.</p> <p><b>3</b> Select <b>Add</b>.</p> <p><b>4</b> Select <b>Type "https"</b>, choose the SSL certificate, and then select <b>OK</b>.</p> <p><b>5</b> Accept the confirmation.</p>

**Table C-1**      How to configure an IIS website with HTTPS (*continued*)

Step	Action	Process
3	Edit the NSS system URLs.	<ol style="list-style-type: none"> <li><b>1</b> In Windows Explorer navigate to the NetBackup Self Service Adapter installation location. By default, this location is <code>C:\Program Files\Biomni\NetBackup Self Service Adapter x.x</code></li> <li><b>2</b> Double click <code>NetBackupSelfServiceAdapterConfigurator.exe</code></li> <li><b>3</b> Select the <b>Edit URLs in NetBackup Self Service Adapter</b> option, click <b>Next</b></li> <li><b>4</b> The next page loads the existing URLs for the system, click <b>Next</b></li> <li><b>5</b> The <b>Edit Self Service URLs</b> page lets you edit the four URLs in the system. Change the URL scheme to HTTPS, and change the host name to match the host name that is specified in the SSL certificate. Click <b>Next</b>.</li> <li><b>6</b> The <b>Validate URLs</b> page calls each of the four URLs and confirms that they connect. If you have difficulty getting the URLs to validate, the information in the Log file may help you.</li> <li><b>7</b> If the URLs validate correctly, click <b>Next</b>.</li> <li><b>8</b> Update URLs. The configurator runs and updates the URLs in Self Service.</li> <li><b>9</b> You should now be able to log on to Self Service using the new URL, and the system should load cleanly.</li> </ol>



# Load balanced installation

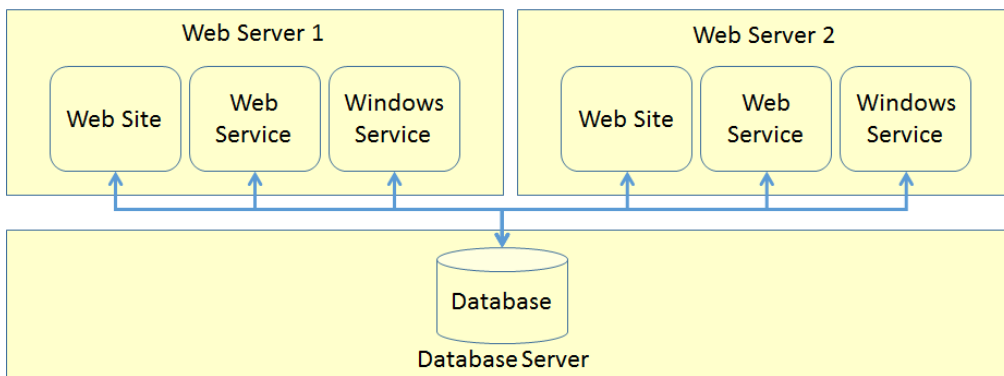
This appendix includes the following topics:

- [About load-balanced installation](#)

## About load-balanced installation

A load-balanced installation has a single database server and database, but multiple instances of the website, web service and Windows service. This configuration provides load balancing and redundancy.

**Figure D-1**



You can run the installation on any web server or application server. The installation process copies all of the required files onto the server. You can select the components to install or upgrade at the Configurator stage. For example, to configure an application server that hosts the Windows service, choose to configure only the Windows service.

When you create a load-balanced installation, all of the components must be installed with the same application key. On the first installation of the system, generate a new application key. On subsequent installs, copy the application key, rather than generate a new key. More information about the application key is available.

See [“Recovering a lost application key”](#) on page 37.

# Customizing image upload

This appendix includes the following topics:

- [About Customizing Image Upload](#)

## About Customizing Image Upload

Image upload is configured automatically. The uploaded images are stored in `C:\inetpub\Biomni\Images` by default. In a load-balanced installation, all of the web servers need to share any images that users may upload to the system. You must configure the uploaded images to reside on a common network storage area. This section describes how to change the storage location.

### To change the storage location

- 1 Launch Internet Information Services (IIS) Manager.
- 2 Navigate to the **NetBackup Self Service** Application.
- 3 Expand the view, and locate the `UploadedImages` virtual directory.
- 4 Right click **Manage Virtual Directory** and select **Advanced Settings**.
- 5 In the **physical path** text box enter the path to where you want the virtual directory to exist on disk. This path is where any uploaded images are stored. The path can either be a path on the local server, such as `C:\uploadedimages` or a UNC share, such as `\\myshare\uploadedimages`.
- 6 By default the connection to the physical directory is set to be **pass-through authentication**. If a UNC Share was chosen then click **Physical Path Credentials > Specific User** and enter the credentials.
- 7 In either scenario the connecting credentials require read and write access to the physical location.

**To verify that the image upload works correctly**

- 1** Log on to the website as Admin.
- 2** **Admin > Support > Configuration Check > Base Settings.**
- 3** Click the image icon.
- 4** The Image Manager should list the `UploadedImages` folder.
- 5** Select the `UploadedImages` folder and click the upload icon.
- 6** Browse to an image file and upload. If the image is successfully uploaded, it should appear to the right of the image manager dialog box.

# Reduced Database Permissions for Database Upgrade

This appendix includes the following topics:

- [Reduced Database Permissions for Database Upgrade](#)

## Reduced Database Permissions for Database Upgrade

When you upgrade the database it is necessary to choose a database logon to perform the database upgrade. The simplest choice is to use a user that has the 'sysadmin' role.

If your database administrator (DBA) is unwilling to grant the sysadmin role to you, you can do a database upgrade with a reduced permission set. This appendix describes the upgrade process with reduced permissions.

The following SQL script creates a logon **UpgradeUser** which is suitable for upgrading the database.

### To create a reduced permissions user for upgrade

- 1 Run this script in SQL Management Studio, to create a logon and user suitable for upgrading the database
- 2 When you run the configurator and select the database to upgrade, choose:
  - Authentication Mode: **Sql**
  - DB User: **UpgradeUser**

- DB Password: *password*

**3** Once install is complete you can disable or delete the **UpgradeUser**, since it is only used during the upgrade process.

```
-- Create a login for upgrading the database
use master
Create Login UpgradeUser WITH PASSWORD = 'password', Check_Policy = OFF
GO

-- Make a database user for the login
-- and give them db_owner role on the target database
USE NetBackupSelfService
CREATE USER UpgradeUser FOR LOGIN UpgradeUser
GO
ALTER ROLE db_owner ADD MEMBER UpgradeUser
GO

-- Allow ownership of database to be transferred to sa.
-- The sa login can be disabled as per good dba practice,
-- and everything will still work ok.
use master
GRANT IMPERSONATE ON LOGIN::sa to UpgradeUser
```