

Getting Started Guide

Novell® PlateSpin Forge®

2.5

August 24, 2009

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About This Guide

This *Getting Started Guide* introduces the PlateSpin Forge[®] 2.5 hardware appliance. It provides an overview of the Forge appliance and explains the initial setup and configuration of the appliance, including licensing requirements. Upgrade information is also provided, to ensure a simple conversion from previous versions of Forge. The guide is organized as follows:

- ♦ [Chapter 1, “Appliance Configuration,” on page 9](#)

Audience

This documentation is intended for data center managers, and IT or operations administrators. It assumes that users of the product have the following background:

- ♦ General understanding of network operating environments and systems architecture.
- ♦ General virtualization knowledge.
- ♦ Understanding of disaster recovery principles.

The contents of this guide are of interest to IT personnel, data center system administrators, or any other persons who are responsible for the deployment of hardware in your environment. Under normal circumstances, the steps in this guide should not need to be repeated after the initial deployment is complete.

PlateSpin Forge 2.5 hardware appliance administrators and users should refer to the *PlateSpin Forge 2.5 User Guide* for information on the day-to-day functionality of the unit.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please use the User Comments feature at the bottom of each page of the online documentation, or submit your comments through the [Novell Documentation Feedback site \(http://www.novell.com/documentation/feedback.html\)](http://www.novell.com/documentation/feedback.html).

Documentation Updates

For the most recent version of this text, visit the [PlateSpin Forge version 2.5 Web site \(http://www.novell.com/documentation/platespin_forge_25/\)](http://www.novell.com/documentation/platespin_forge_25/).

Additional Documentation

This guide is part of the PlateSpin Forge[®] documentation set. Below is a complete list of the set:

<i>PlateSpin Forge 2.5 Release Notes</i>	Provides late-breaking information, as well as information about known issues and suggested workarounds.
PlateSpin Forge 2.5 Getting Started Guide	Provides information about installing the product and performing the initial configuration.
PlateSpin Forge 2.5 User Guide	Provides information about using the product in your workload protection projects.

<i>PlateSpin Forge 2.5 Upgrade Guide</i>	Provides information on upgrading the forge unit, both from downloaded files and using a PlateSpin Forge USB stick.
PlateSpin Forge 2.5 Integrated Help	The User Guide in compiled HTML help format, integrated with the product.
PlateSpin Forge 2.5 Online Documentation	All product documentation in WebHelp format for browser-based access over the Internet. This distribution should contain the latest updates at all times.

Additional Resources

We encourage you to use the following additional resources on the Web:

- ♦ [PlateSpin User Forum \(http://forum.platespin.com\)](http://forum.platespin.com): A Web-based community with a variety of discussion topics.
- ♦ [PlateSpin Knowledge Base \(http://support.platespin.com/kb2/\)](http://support.platespin.com/kb2/): A collection of in-depth technical articles.

Technical Support

- ♦ Telephone (North America): +1-877-528-3774 (1 87 PlateSpin)
- ♦ Telephone (global): +1-416-203-4799
- ♦ E-mail: support@platespin.com

You can also visit the [PlateSpin Technical Support Web site \(http://www.platespin.com/support/\)](http://www.platespin.com/support/).

Documentation Conventions

In Novell documentation, a greater-than symbol (>) is used to separate actions within a step and items in a cross-reference path.

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Appliance Configuration

1

The following sections contain information to help you with the initial setup and configuration of your PlateSpin Forge® hardware appliance:

- ♦ [Section 1.1, “Before You Begin,” on page 9](#)
- ♦ [Section 1.2, “Configuring the Appliance,” on page 10](#)
- ♦ [Section 1.3, “Connecting to the PlateSpin Forge Web Interface,” on page 16](#)
- ♦ [Section 1.4, “PlateSpin Forge Product Licensing,” on page 17](#)
- ♦ [Section 1.5, “PlateSpin Forge Management VM Configuration,” on page 18](#)

1.1 Before You Begin

This section contains information about tasks to complete prior to installing and configuring your Forge appliance. Record all pertinent information on your Configuration Worksheet for future reference.

1.1.1 Obtain the License Activation Code

For product licensing, you must have a license activation code. If you do not have a license activation code, request one through the [Novell® Customer Center Web site \(http://www.novell.com/customercenter/\)](http://www.novell.com/customercenter/). A license activation code will be e-mailed to you.

1.1.2 Obtain the ESX Licenses

The licensing e-mail sent to the named contact of the purchase with the license activation code also contains the VMware license codes for the ESX part of the Forge appliance. During the configuration of the appliance, you need a Host License file, which you should download beforehand from the VMware Web site.

Go to the [VMware Web site \(https://www.vmware.com/vmwarestore/newstore/oem_login.jsp?Name=PLATESPIN-AC\)](https://www.vmware.com/vmwarestore/newstore/oem_login.jsp?Name=PLATESPIN-AC) and follow the on-screen instructions, using the license codes in your licensing e-mail.

1.1.3 Fill in the Configuration Worksheet

Fill in the remainder of the Configuration Worksheet. This handy reference will save you time and energy during the installation and configuration of your Forge hardware.

1.1.4 Setup the Hardware

Unpack the PlateSpin Forge hardware and using the Components List in the box, ensure all components have been received. If there is anything missing, contact your PlateSpin representative. Using the hardware manufacturer’s documentation shipped with the unit, mount and connect the hardware, including the monitor and keyboard.

Once everything is connected and powered on correctly, proceed to “Configuring the Appliance” on page 10.

1.2 Configuring the Appliance

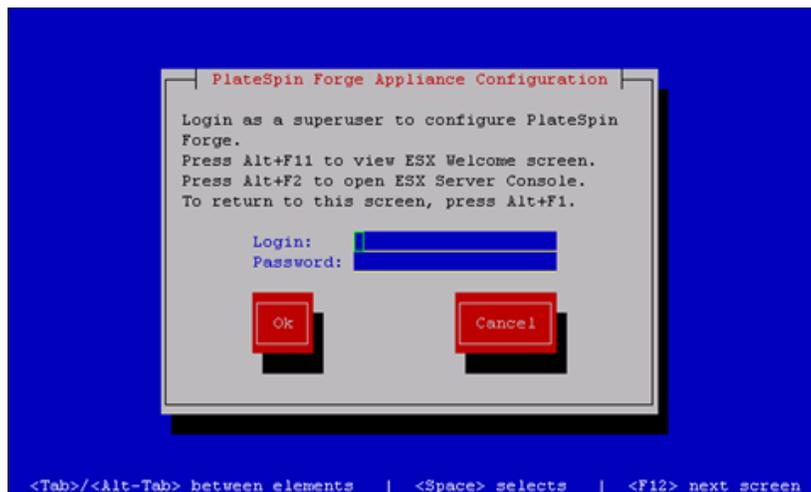
The initial setup and configuration of the PlateSpin Forge 2.5 hardware appliance is a one-time procedure. Record all pertinent information on the Configuration Worksheet in case you need to contact PlateSpin Technical Support with any setup issues.

IMPORTANT: Unsupported modifications to the PlateSpin Forge Appliance or Management VM, including running other virtual machines on the PlateSpin Forge Appliance, can impact its performance and might violate the End User License Agreement, voiding your warranty. For further information, you can review your License Agreement by logging in to [Platespin’s download page \(http://www.platespin.com/downloads\)](http://www.platespin.com/downloads), selecting the *Legal* tab on the left, and downloading the *PlateSpin Forge End-User License Agreement*.

1.2.1 Initial Setup and Configuration

To fully configure the PlateSpin Forge 2.5 hardware appliance, you need to configure the Application Host (the hardware) and the Management VM (the software).

- 1 Ensure that the PlateSpin Forge Appliance Configuration dialog box is displayed.



- 2 Type `root` in the *Login* field and `password` in the *Password* field. Click *OK*.
The *change default password* dialog box is displayed. You must change the default password before proceeding.
- 3 Type a new password in the *New password* field and again in the *Confirm Password* field. Click *OK*.
A notification that the password has been changed is displayed.
- 4 Click *OK*.
You are logged out so that you can log back in with your new password.
- 5 Log back in.

The VMware ESX EULA dialog box requesting acceptance of the end user license agreement is displayed.

- 6 Select *I accept the terms and conditions*, then select *OK*.

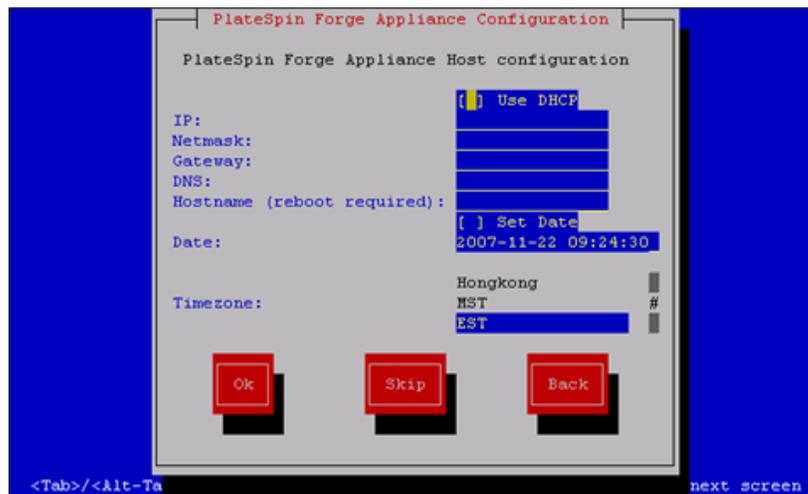
See the [VMware Web Site \(http://www.vmware.com\)](http://www.vmware.com) for the latest end user license agreement.

The PlateSpin Forge EULA dialog box requesting acceptance of the PlateSpin Forge end user license agreement is displayed.

- 7 Select *I accept the terms and conditions*, then select *OK*.

The PlateSpin Forge Appliance Host Configuration dialog box is displayed.

- 8 Specify the *IP* address, *Netmask*, and *Gateway* IP Address you want to assign to the Appliance Host. Optionally, you can also enter a *Hostname*, but you will need to reboot the Forge appliance.

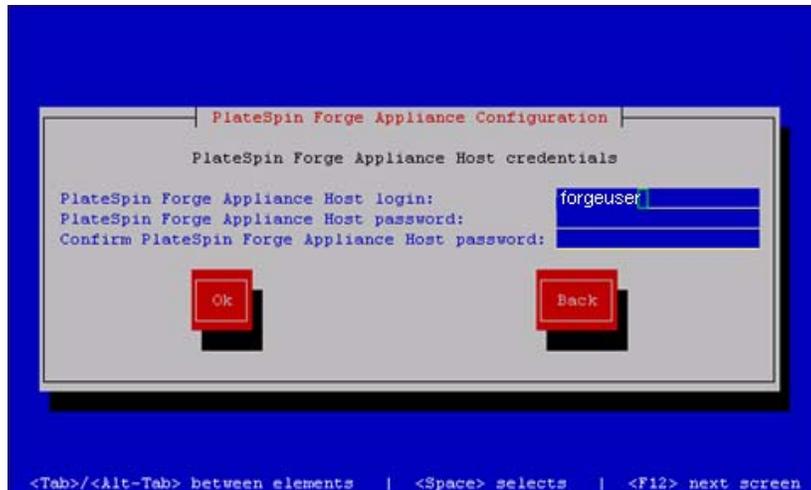


You can also use DHCP, but assigning a static IP address is recommended. It is also highly recommended to assign hostnames to the appliances in multiple-appliance environments to avoid hostname conflicts.

- 9 Select *Set Date* and specify a date and time.
- 10 Select a *Timezone*. Click *OK*.

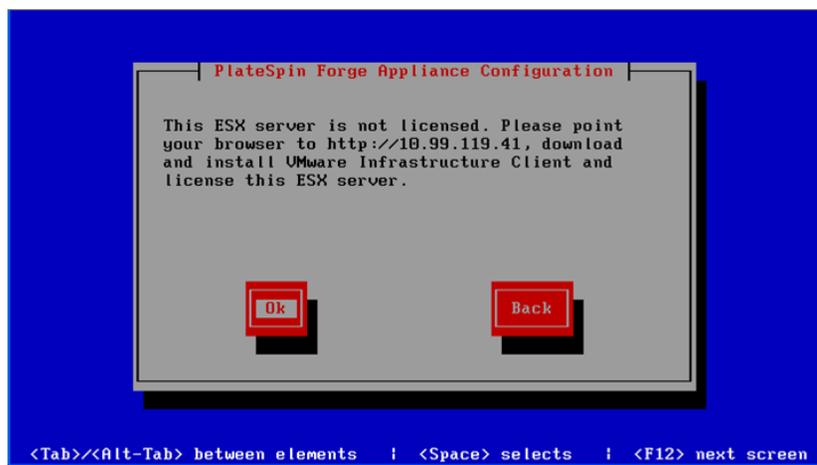
The PlateSpin Forge Appliance Host Credentials dialog box is displayed. This is where you enter the credentials you want to use to access the ESX server, which is the hypervisor layer of the PlateSpin Forge appliance.

- 11 Specify a login name in the *PlateSpin Forge Appliance Host login* field.
- 12 Type a password, then confirm by retyping the password. Click *OK*.



This creates a new ESX user that is a member of the `root` group. Unlike the `root` user, the new user has SSH permissions on ESX.

An ESX license warning is displayed:



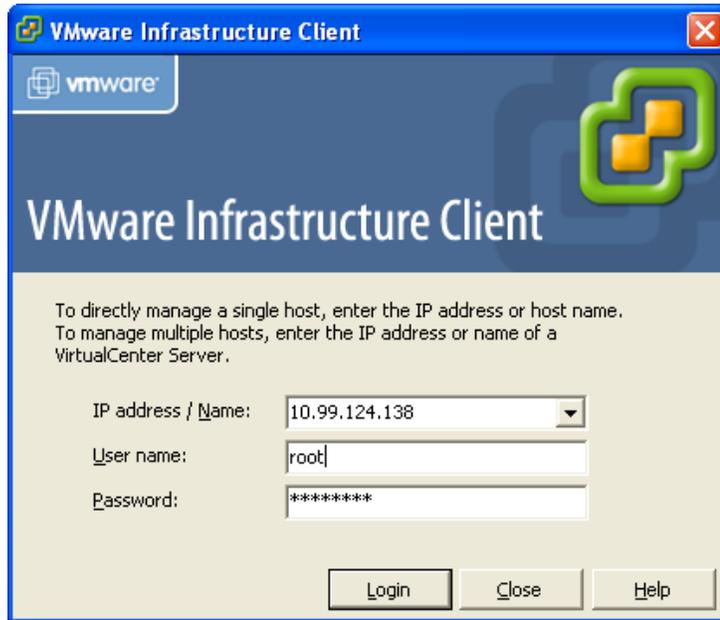
The ESX license key cannot be added directly from the console of the appliance.

- 13** If you are configuring the Forge appliance locally (directly on the Forge appliance), go to another workstation.

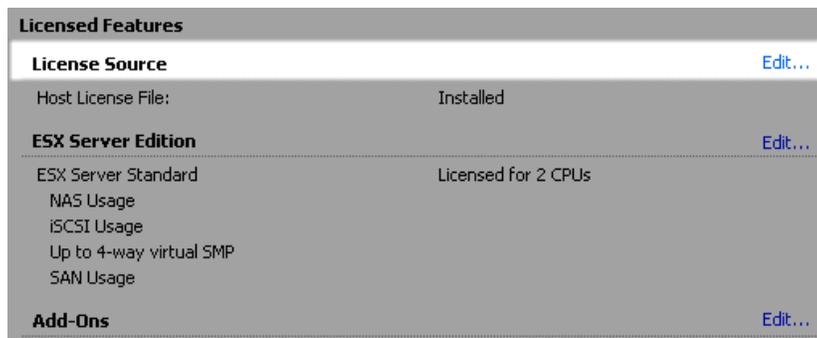
You will be downloading and installing the VMware Infrastructure Client on the workstation. If you are not sure that the workstation meets the necessary requirements, you can visit [VMware's Web site \(http://pubs.vmware.com/vi301/install/wwhelp/wwhimpl/common/html/wwhelp.htm?context=install&file=install_requirements.4.1.html#954737\)](http://pubs.vmware.com/vi301/install/wwhelp/wwhimpl/common/html/wwhelp.htm?context=install&file=install_requirements.4.1.html#954737) to verify the required specifications.

- 14** Open a browser and enter the IP address you assigned to the Forge appliance in [Step 8](#).
The VMware ESX Server's Welcome page is displayed.
- 15** Click the *Download VMware Infrastructure Client* hyperlink, then follow the instructions to download and install the software.
- 16** Launch the VMware Infrastructure Client by clicking *Start > Programs > VMware > VMware Infrastructure Client*.

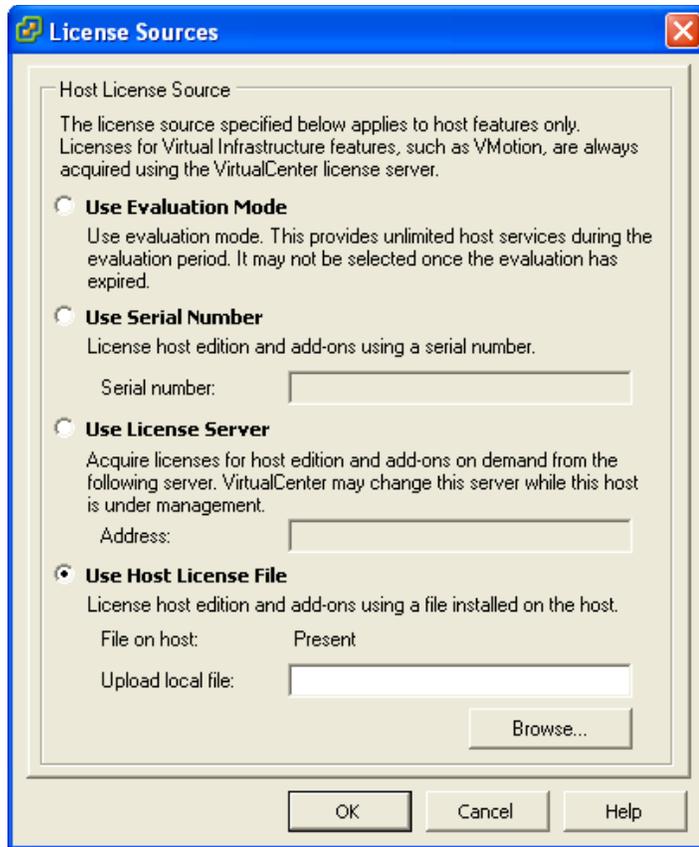
The VMware Infrastructure Client login is displayed.



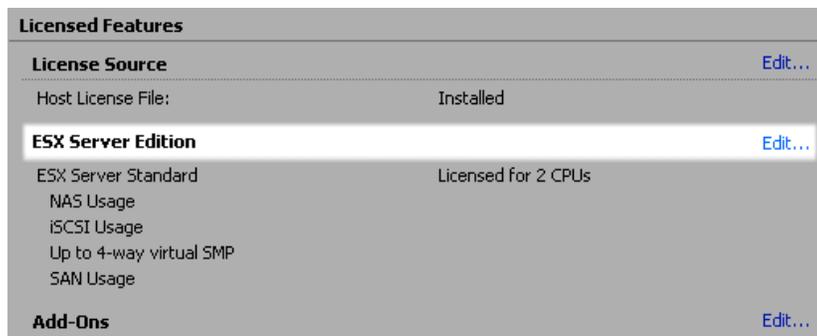
- 17 Specify the VMWare ESX Server credentials and log in, ignoring any SSL certificate warnings.
The VMware Infrastructure Client interface is displayed.
- 18 Click the *Configuration* tab, and in the *Software* section, click *Licensed Features*.
- 19 In the *License Source* row, click *Edit*.



The *License Sources* window is displayed.

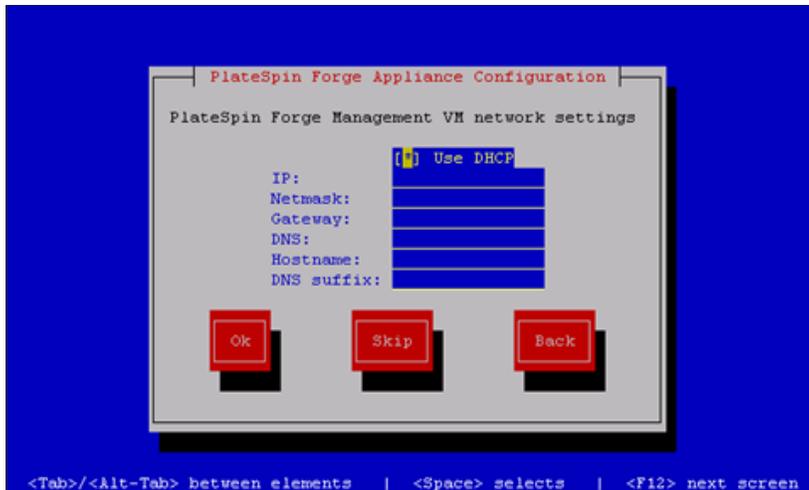


- 20 Select *Use Host License File*.
- 21 Click *Browse* and select the License file you downloaded in [Section 1.1.2, “Obtain the ESX Licenses,”](#) on page 9. Click *OK*.
- 22 In the *ESX Server Edition* row, click *Edit*.



The *ESX Server Edition* dialog is displayed.

- 23 Select *ESX Server Foundation* and click *OK*.
You can now return to the Forge appliance to continue the configuration.
- 24 Click *Ok*.
The PlateSpin Forge Management VM network settings dialog box is displayed.



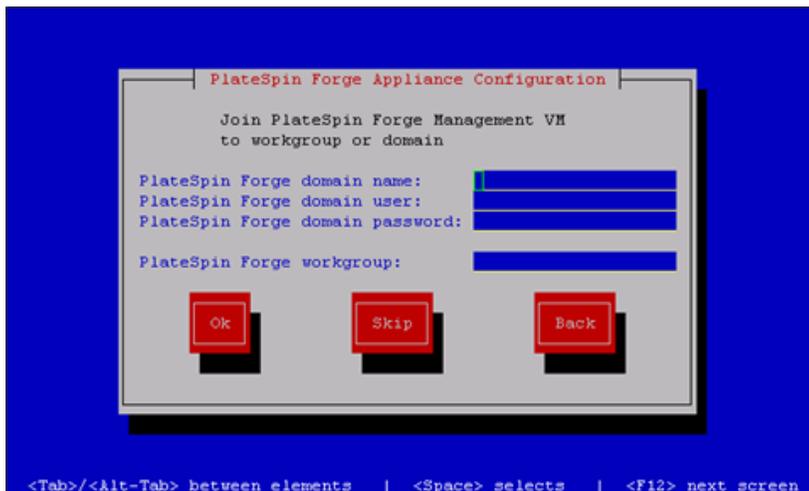
- 25** Deselect *Use DHCP* and provide the PlateSpin Forge Management VM *IP* address, *Netmask*, *Gateway* address, and (optionally) a *Hostname*. The IP address entered here is used to access the PlateSpin Forge Web Interface.

You can also use DHCP, but assigning a static IP address is recommended.

- 26** (Optional) Type the name of a DNS server in the *DNS* field and provide a *DNS suffix*.
- 27** Click *OK*.

The PlateSpin Forge Appliance Configuration dialog box prompts whether or not to join a workgroup or domain.

- 28** Select *Yes* to open the Join PlateSpin Forge Management VM to workgroup or domain dialog box:



Joining a domain allows you to give selected domain users permissions for the application. See [Section 1.5.1, “Changing the Administrator Password and Adding Users,”](#) on page 18 for information about adding domain users.

29 Do one of the following:

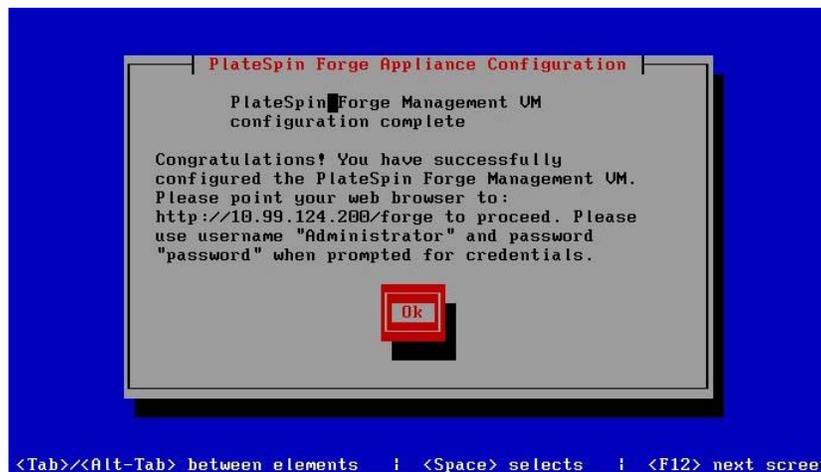
- ◆ Type a domain name, user, and password, or type a workgroup. If the domain fields are populated, the *Workgroup* field is ignored. Select *Ok*.
- ◆ Leave the fields empty and click *Skip* to proceed to the next step and use `WORKGROUP` as the default workgroup name.

A Configuration review dialog box is displayed with a summary of the parameters you have selected. Use the information to verify your settings.

If necessary, select *Cancel* to display an error message or to exit the PlateSpin Forge configuration. Select *Back* to edit previous settings.

30 Select *Ok*.

A configuration progress dialog box is displayed. Configuration can take several minutes. A final dialog box is displayed confirming the configuration's success or failure. If the process is successful, the dialog box presents a URL you can use to access the PlateSpin Forge Web Interface. Record this URL for future use.



31 Select *OK*.

1.3 Connecting to the PlateSpin Forge Web Interface

NOTE: PlateSpin Forge supports Microsoft Internet Explorer 7 and 8 (in compatibility mode) and Mozilla FireFox 2.x, 3.x. It also supports HTTPS as the default protocol between server and client, but HTTP can also be used.

At a workstation, point a browser to the URL presented at the end of the Appliance Configuration process. The URL has the following syntax:

```
https://IP_address|hostname/Forge
```

where *ipaddress|hostname* is the IP address or hostname of the PlateSpin Forge Management VM.

Log in to the Web interface using the default credentials `Administrator` and `password`. It is highly recommended to change this password immediately. See [Section 1.5.1, “Changing the Administrator Password and Adding Users,”](#) on page 18.

1.4 PlateSpin Forge Product Licensing

This section provides information about licensing and activating your PlateSpin Forge® appliance, as well as managing your license keys.

- ♦ [Section 1.4.1, “License Activation,” on page 17](#)
- ♦ [Section 1.4.2, “Online Activation,” on page 17](#)
- ♦ [Section 1.4.3, “Offline Activation,” on page 18](#)

1.4.1 License Activation

For product licensing, you must have a license activation code. If you do not have a license activation code, request one through the [Novell® Customer Center Web site \(http://www.novell.com/customercenter/\)](http://www.novell.com/customercenter/). A license activation code will be e-mailed to you.

The first time a user logs in to PlateSpin Forge, the browser is automatically redirected to the License Activation page. You have two options for activating your product license: online or offline.

1.4.2 Online Activation

Online activation requires that your Forge appliance have Internet access.

NOTE: HTTP proxies might cause failures during online activation. Offline activation is recommended for users in HTTP proxy environments.

- 1 In the PlateSpin Forge Web Interface, click *Add license*. The License Activation page is displayed.



- 2 Select *Online Activation*, enter the e-mail address that you provided when placing your order and the activation code you received, then click *Activate*.

The Forge appliance obtains the required license over the Internet and activates the product.

NOTE: Although it is rare to need to perform the license activation more than once, you can access the License Activation page by choosing *Settings > License* from the dashboard.

1.4.3 Offline Activation

For offline activation, you obtain a license key over the Internet by using a machine other than the Forge appliance that has Internet access.

- 1 From the Forge dashboard, click *Settings > License*, and then click *Add license*. The License Activation page is displayed.
- 2 Select *Offline Activation*.
- 3 Use the hardware ID provided to create a license key file at the [PlateSpin Product Activation Web Site \(http://www.platespin.com/productactivation/ActivateOrder.aspx\)](http://www.platespin.com/productactivation/ActivateOrder.aspx). This also requires a user name, password, the e-mail address that you provided when placing your order and the activation code you received.

NOTE: To obtain a license key, you must have a Novell® account. If you are an existing PlateSpin customer and you don't have a Novell account, you must first create one. Use your existing PlateSpin username (a valid e-mail address registered with PlateSpin) as input for your Novell account username.

- 4 Type the path to the file or browse to its location and click *Activate*.
The License Key file is saved and the Forge appliance is activated based on this file.

1.5 PlateSpin Forge Management VM Configuration

After configuring the appliance and activating the PlateSpin Forge license, you need to configure the VM:

- ♦ Change the Administrator default password and add users to the Administrators group of the PlateSpin Forge Management VM. For information, see [Section 1.5.1, “Changing the Administrator Password and Adding Users,” on page 18](#).
- ♦ Configure SMTP settings. For information, see [Section 1.5.2, “SMTP Configuration,” on page 19](#).
- ♦ Add recipients for e-mail notification. For information, see [Section 1.5.3, “E-Mail Configuration,” on page 20](#).
- ♦ Review built-in protection tiers and (if necessary) create new custom tiers. For detailed information, see “Managing Protection Tiers” in the *PlateSpin Forge™ User Guide* or in the online help.

1.5.1 Changing the Administrator Password and Adding Users

Use the Web User Interface for Microsoft Windows Server to change the Administrator password and to add users to the Administrator group of the PlateSpin Forge Management VM.

Figure 1-1 Web User Interface for Microsoft Windows Server



To access the Web User Interface, open a new browser window and navigate to <https://ipaddress:8098> where *ipaddress* is the IP address of the PlateSpin Forge Management VM. There is a link to the Web User Interface under *Settings > Appliance Host*.

Click *Set Administrator Password*. Enter the password, which by default is set to password, then enter and confirm the new password. Click *Ok*. The Web interface confirms the password change. Click *Ok* to return to the main page.

NOTE: The Web User Interface is only supported for Microsoft Internet Explorer.

To add a user to the Administrators Group for the PlateSpin Forge Management VM:

- 1 In the PlateSpin Forge Web Interface, click *Users* on the toolbar, then click *Local Users*.
- 2 Click *New* on the right side of the Web page.
- 3 Specify a *User Name* and *Password*. Confirm the password. All other fields are optional.
- 4 Click *Ok*.

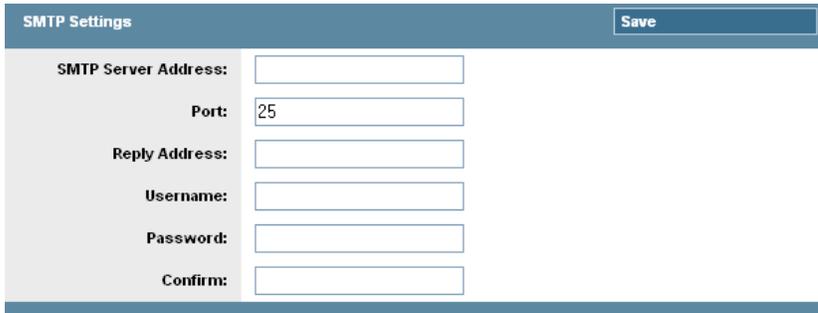
To add the new user, or any domain user, to the Administrator Group:

- 1 In the PlateSpin Forge Web Interface, click *Local Groups*.
- 2 Select the *Administrators* Group.
- 3 Click *Properties*.
- 4 Click *Members*.
- 5 Select the desired User from the list on the right side of the Web page and click *Add*.
- 6 Click *Ok*.

1.5.2 SMTP Configuration

Use the PlateSpin Forge Web Interface to configure SMTP (Simple Mail Transfer Protocol) settings for the server used to deliver e-mail notifications.

Figure 1-2 Simple Mail Transfer Protocol settings



SMTP Settings		Save
SMTP Server Address:	<input type="text"/>	
Port:	<input type="text" value="25"/>	
Reply Address:	<input type="text"/>	
Username:	<input type="text"/>	
Password:	<input type="text"/>	
Confirm:	<input type="text"/>	

To configure SMTP settings:

- 1 On the navigation bar in the PlateSpin Forge Web Interface, click *Settings* > *SMTP*.
- 2 Specify a SMTP server *Address*, *Port* if desired (the default is Port 25), and *Reply Address* for receiving e-mail event and progress notifications.
- 3 Type a *Username* and *Password*, then confirm the password.
- 4 Click *Save*.

1.5.3 E-Mail Configuration

Use the PlateSpin Forge Web Interface to configure e-mail for important notifications. (The Web Interface is available only in Internet Explorer.)

- 1 On the navigation bar, click *Settings*. Click *Email*.
- 2 Select *Enable email notifications* to receive e-mail notification of certain Protection Events.
- 3 Click *Add Email Addresses* to add one or more addresses to which to send the notifications.
- 4 In the *Email Addresses* field type an e-mail address or multiple addresses (separated by commas). Click *Add*.
- 5 To delete listed addresses, click *Delete* next to the address to be removed.