PlateSpin Forge® 11.1

Getting Started Guide

March 2015

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About this Book and the Library

This *Getting Started Guide* provides information about the basic steps required for setting up your PlateSpin Forge® appliance.

Intended Audience

This information is intended for IT staff, such as data center administrators and operators, who use PlateSpin Forge in their ongoing workload protection projects.

Information in the Library

The library for this product is available in HTML and PDF formats on the PlateSpin Forge Documentation (https://www.netiq.com/documentation/platespin-forge/) website. In addition to the English language, online documentation is available in the Chinese Simplified, Chinese Traditional, French, German, Japanese, and Spanish languages.

The PlateSpin Forge library provides the following information resources:

Release Notes

Provides information about new features and enhancements in the release, as well as any known issues.

Getting Started Guide

Provides information about how to configure the appliance for your environment.

User Guide

Provides conceptual information, an overview of the user interface, and step-by-step guidance for common tasks.

Rebuild Guide

Provides information about how to rebuild and reconfigure the appliance by using the *Protect Forge Field Rebuild Kit*.

Upgrade Guide

Provides information about how to upgrade the appliance software.

Help

Provides context-sensitive information and step-by-step guidance for common tasks as you work in the user interface.

Additional Resources

We encourage you to use the following additional resources online:

- PlateSpin Forge Forum (https://forums.netiq.com/forumdisplay.php?56-Platespin-Forge): A web-based community of product users where you can discuss product functionality and advice with other product users.
- PlateSpin Forge Product (https://www.netiq.com/products/forge/): A web-based product brochure that provides information about features, how to buy, technical specifications, frequently asked questions, and a variety of resources such as videos and white papers.
- NetIQ User Community (https://www.netiq.com/communities/): A web-based community with a variety of discussion topics.
- NetIQ Support Knowledgebase (https://www.netiq.com/support/kb/): A collection of in-depth technical articles.
- NetIQ Support Forums (https://forums.netiq.com/forum.php): A web location where product users can discuss NetIQ product functionality and advice with other product users.
- MyNetIQ (https://www.netiq.com/f/mynetiq/): A website offering product information and services, such as access to premium white papers, webcast registrations, and product trial downloads.

About NetIQ Corporation

We are a global, enterprise software company, with a focus on the three persistent challenges in your environment: Change, complexity and risk—and how we can help you control them.

Our Viewpoint

Adapting to change and managing complexity and risk are nothing new

In fact, of all the challenges you face, these are perhaps the most prominent variables that deny you the control you need to securely measure, monitor, and manage your physical, virtual, and cloud computing environments.

Enabling critical business services, better and faster

We believe that providing as much control as possible to IT organizations is the only way to enable timelier and cost effective delivery of services. Persistent pressures like change and complexity will only continue to increase as organizations continue to change and the technologies needed to manage them become inherently more complex.

Our Philosophy

Selling intelligent solutions, not just software

In order to provide reliable control, we first make sure we understand the real-world scenarios in which IT organizations like yours operate — day in and day out. That's the only way we can develop practical, intelligent IT solutions that successfully yield proven, measurable results. And that's so much more rewarding than simply selling software.

Driving your success is our passion

We place your success at the heart of how we do business. From product inception to deployment, we understand that you need IT solutions that work well and integrate seamlessly with your existing investments; you need ongoing support and training post-deployment; and you need someone that is truly easy to work with — for a change. Ultimately, when you succeed, we all succeed.

Our Solutions

- Identity & Access Governance
- Access Management
- Security Management
- Systems & Application Management
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For questions about products, pricing, and capabilities, contact your local partner. If you cannot contact your partner, contact our Sales Support team.

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Email:	support@netiq.com
Website:	www.netiq.com/support
Product Specific Information:	https://www.netiq.com/support/kb/product.php?id=PlateSpin_Forge

To learn more about the services and procedures of NetIQ Technical Support, see the *Technical Support Guide* (https://www.netiq.com/Support/process.asp#_Maintenance_Programs_and).

Contacting Documentation Support

Our goal is to provide documentation that meets your needs. The documentation for this product is available on the PlateSpin Forge Documentation (https://www.netiq.com/documentation/platespin-forge/) website in HTML and PDF formats.

If you have suggestions for documentation improvements, click **comment on this topic** at the bottom of any page in the HTML version of the documentation. You can also email Documentation-Feedback@netiq.com. We value your input and look forward to hearing from you.

Contacting the Online User Community

NetIQ Communities, the NetIQ online community, is a collaborative network connecting you to your peers and NetIQ experts. By providing more immediate information, useful links to helpful resources, and access to NetIQ experts, NetIQ Communities helps ensure you are mastering the knowledge you need to realize the full potential of IT investments upon which you rely. For more information, visit http://community.netiq.com.

1 Getting Started with Your PlateSpin Forge Appliance

PlateSpin Forge is a consolidated recovery hardware appliance that protects physical and virtual workloads by using embedded virtualization technology. If a production server outage or disaster occurs, the PlateSpin Forge recovery environment rapidly powers on workloads and continues to run them normally until you restore the production environment.

- Section 1.1, “Before You Begin,” on page 9
- Section 1.2, “Appliance Configuration Procedure,” on page 9
- Section 1.3, “Launching the PlateSpin Forge Web Client,” on page 11
- Section 1.4, “Product Licensing,” on page 12
- Section 1.5, “Post-Setup Tasks,” on page 13

1.1 Before You Begin

In preparation for the initial configuration of your appliance, do the following tasks:

1. **Obtain your license activation code:** For product licensing, you must have a license activation code, emailed to the named contact of a PlateSpin Purchase Order. To view your activation code, log in to the Customer Center (http://www.netiq.com/customercenter/), using the same email address specified in your purchase order.
2. **Fill in the configuration worksheet:** Use the “PlateSpin Forge Configuration Worksheet” on page 15 worksheet to record the configuration of your current environment.
3. **Set up the hardware:** Unpack the PlateSpin Forge appliance and use the Components List in the box to ensure that all components are included. If there is anything missing, contact your PlateSpin representative. Use the contents of this guide to help you mount and connect the hardware.

1.2 Appliance Configuration Procedure

The initial setup and configuration of the PlateSpin Forge appliance is a one-time procedure consisting of the following steps:

1 Configuring the appliance host (VMware ESXi, which is the hypervisor component of the product).

2 Configuring the Forge Management VM (a Windows virtual machine with application logic running on the host).

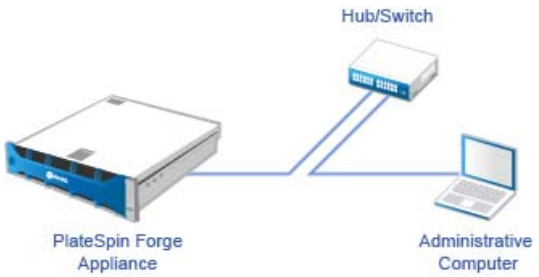
3 Activating your product license.

Fill out the “PlateSpin Forge Configuration Worksheet” on page 15 before starting this procedure.

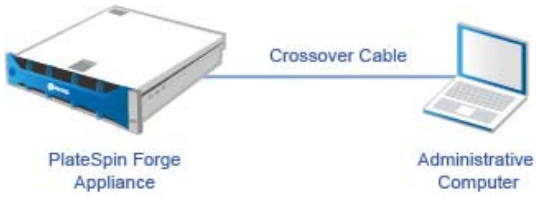
To begin the installation and configuration of the appliance, you need to connect to it directly through another computer (also referred to as the *administrative computer*) and use the browser-based Forge Appliance Configuration Console (ACC) utility. For flexibility and mobility, consider using a notebook computer for this purpose.

Use the following steps to install and configure the appliance:

1. Perform the preparatory steps described in "Before You Begin" on page 9.
2. Connect your administrative computer to the appliance. You can do this in two ways:
   - **Connection through a Network Switch:** Connect both units to a network switch or a hub through an Ethernet network cable:



   - **Direct Connection:** Connect your PlateSpin Forge appliance and the administrative computer directly through a crossover cable:



3. Turn on the power of the PlateSpin Forge appliance. Wait at least 10 minutes for the system to fully start before trying to connect.
4. Assign the computer an IP address, in the `192.168.1.x` range and an associated subnet mask of `255.255.255.0` (or any IP address/subnet mask combination, making sure that the computer is able to ping the appliance at its default IP address, `192.168.1.200`).

   NOTE: Do not use the following IP addresses:
   - 192.168.1.200 - used by the hypervisor
   - 192.168.1.210 - used by the Forge VM (assigned by an automatic appliance configuration utility).

5. Open a supported Web browser and go to the Forge Appliance Configuration Console (Forge ACC) at `http://192.168.1.200:10000`.

   NOTE: Depending on your browser, you might have to type the entire URL, including the protocol (`http://`) in the browser's address bar.

6. Log in using the `root` account (password: `Password1`). The system redirects you to the Change Password page.
7. Change the password for the root account as well as for the `forgeuser` account.
8. Log out of the Forge ACC.

9 Log in using the `forgeuser` account using the password you set in Step 7.

10 Select **Configure Host**.

NOTE: You must first configure the appliance host. Do not attempt to configure the Forge VM prior to this.

---

11 Specify the appropriate settings and click **Apply**.

12 Click **Continue**.

13 When the configuration is complete, disconnect the administrative computer and connect the appliance to the production network (where the new IP address will be valid).

14 From the computer, go to `http://<appliance_IP>:10000`

(If you are using the same computer, you need to change its IP address to one that is valid in your network).

15 Log in using the `forgeuser` account.

16 Click **Configure Forge VM**.

17 At the Configure Forge VM page, enter the appropriate settings and click **Apply**.

18 At the summary page, click **Continue** and wait for the VM configuration to complete.

19 Select the **Forge dashboard** link to connect to the Forge UI at `http://<appliance_IP>/forge`.

20 Use the default credentials for the Forge VM (username: `Administrator`, password: `Password1`).

1.3 Launching the PlateSpin Forge Web Client

Most of your interaction with the appliance takes place through the browser-based PlateSpin Forge Web Client.

The supported browsers are:

- *Google Chrome*, version 34.0 and later
- *Microsoft Internet Explorer*, version 11.0 and later
- *Mozilla Firefox*, version 29.0 and later

NOTE: JavaScript (Active Scripting) must be enabled in your browser:

- **Chrome:** From the Chrome menu, select **Settings**, scroll to and select **Show advanced settings...**, select **Content Settings** > **Allow all sites to run JavaScript**.
- **IE:** From the Tools menu, select **Internet Options** > **Security**, click **Custom level**, scroll to and select **Active scripting**, select **Enable**, select **Yes** at the warning dialog box, click **OK**, click **Apply** > **OK**.
- **Firefox:** Click **Tools** > **Options** > **Content**, then select the **Enable JavaScript** option.

To launch the PlateSpin Forge Web Client:

1 Open a Web browser and go to:

`http://<hostname | IP_address>/Forge`

NOTE: Replace <*hostname* | *IP_address*> with the hostname or the IP address of your Forge VM.

If SSL is enabled, use `https` in the URL.

The first time you log into PlateSpin Forge, the browser redirects to the License Activation page.

1.4 Product Licensing

For PlateSpin Forge product licensing, you must have a license activation code. If you do not have a license activation code, request one through the Customer Center website (http://www.netiq.com/customercenter/). A license activation code will be emailed to you.

You have two options for activating your product license: online or offline.

- Section 1.4.1, “Online License Activation,” on page 12
- Section 1.4.2, “Offline License Activation,” on page 12

1.4.1 Online License Activation

For online activation, PlateSpin Forge must have Internet access.

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

To activate a license online, use the following steps:

1. In the PlateSpin Forge Web Client, click **Settings** > **Licenses** > **Add License**.
2. On the License Activation page, select **Online Activation**, then specify the email address that you provided when placing your order.
3. Specify the activation code you received, then click *Activate*.

   The system obtains the required license over the Internet and activates the product.

1.4.2 Offline License Activation

For offline activation, you obtain a PlateSpin Forge license key over the Internet by using a computer that has Internet access.

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

To activate a license offline, use the following steps:

1. In the PlateSpin Forge Web interface, click **Settings** > **License**, then click **Add license**.
2. On the License Activation page, select **Offline Activation.**

3 Use your hardware ID to create a license key file at the PlateSpin Product Activation website (http://www.platespin.com/productactivation/ActivateOrder.aspx). This also requires a user name, password, the email address that you provided when placing your order and the activation code you received.

4 Type the path to the file or browse to its location and click *Activate*.

The license key file is saved and the product is activated based on this file.

1.5 Post-Setup Tasks

You need to consider and act upon the following tasks after you have set up the Forge appliance:

- ❒ (Optional; for international versions) Set up PlateSpin Forge and your browser for use in a specific supported language. See "Language Setup for International Versions of PlateSpin Forge" in the *PlateSpin Forge User Guide*.
- ❒ Configure appliance host networking to separate replication or failover traffic from your main production network. See "Setting up Appliance Host Networking" in the *PlateSpin Forge User Guide*.
- ❒ Configure SMTP settings and add email notification recipients. See "Setting Up Automatic Email Notifications of Events and Reports" in the *PlateSpin Forge User Guide*.
- ❒ (Optional) Add additional data storage capacity to Forge. See "Using External Storage Solutions with PlateSpin Forge" in the *PlateSpin Forge User Guide*.
- ❒ Familiarize yourself with the PlateSpin Forge Web Interface (see "Up and Running" in your *User Guide*), as well as the workload protection life cycle (see "Basic Workflow for Workload Protection and Recovery" in the *PlateSpin Forge User Guide*).

A PlateSpin Forge Configuration Worksheet

Use the following worksheet to record your selections and configurations for future reference.

A.1 Appliance Setup Parameters for Reference

	Parameters	Details
1.	Forge Superuser/root (a.k.a. Forge Virtual Host)	Login: **`root`** Password (default: `Password1`): _ _ _ _ _ _ _ _ _ _ _
2.	Appliance Host Network Information	**[ ] Use a static IP address** ◆ IP address: _ _ _ _ _ _ _ _ _ _ _ ◆ Netmask: _ _ _ _ _ _ _ _ _ _ _ ◆ Default Gateway (router) IP address: _ _ _ _ _ _ _ _ _ _ _ ◆ DNS Server IP address: _ _ _ _ _ _ _ _ _ _ _ ◆ Hostname (such as `forge`): _ _ _ _ _ _ _ _ _ _ _
3.	Forge Host Credentials	Host login: **`forgeuser`** Password: _ _ _ _ _ _ _ _ _ _ _
4.	VMware Infrastructure/vSphere Client	IP address / Name (from section 2): _ _ _ _ _ _ _ _ _ _ _ User Name (from section 3): _ _ _ _ _ _ _ _ _ _ _ Password (from section 3): _ _ _ _ _ _ _ _ _ _ _
5.	Forge Management VM network settings	**[ ] Use DHCP** **[ ] Use a static IP address** ◆ IP address: _ _ _ _ _ _ _ _ _ _ _ ◆ Netmask: _ _ _ _ _ _ _ _ _ _ _ ◆ Default Gateway (router) IP address: _ _ _ _ _ _ _ _ _ _ _ ◆ DNS Server IP address: _ _ _ _ _ _ _ _ _ _ _ ◆ Hostname: _ _ _ _ _ _ _ _ _ _ _ ◆ DNS Suffix: _ _ _ _ _ _ _ _ _ _ _

NOTES:

	Parameters	Details
6.	Join workgroup or domain	**[ ] Skip** **[ ] Yes** ◆ **[ ] Domain** ◆ Domain name: _ _ _ _ _ _ _ _ _ _ _ ◆ Domain user: _ _ _ _ _ _ _ _ _ _ _ ◆ Domain password: _ _ _ _ _ _ _ _ _ _ _ ◆ **[ ] Workgroup** ◆ Workgroup name: _ _ _ _ _ _ _ _ _ _ _
7.	PlateSpin Forge Web Client Credentials	Username (default: **`Administrator`**): _ _ _ _ _ _ _ _ _ _ _ Password (default: **`Password1`**): _ _ _ _ _ _ _ _ _ _ _
8.	PlateSpin Forge License Activation	**[ ] Online Activation** ◆ Email Address (from the NetIQ Order email): _ _ _ _ _ _ _ _ _ _ _ ◆ Activation Code (from NCC): _ _ _ _ _ _ _ _ _ _ _ **[ ] Offline Activation** ◆ Hardware ID: _ _ _ _ _ _ _ _ _ _ _ ◆ License File location: _ _ _ _ _ _ _ _ _ _ _
9.	Microsoft Windows Server 2012 License Key	Windows 2012 License Key:_ _ _ _ _ _ _ _ _ _ _
10.	Microsoft SQL Server 2014 Product Key	SQL Server 2014 Product Key:_ _ _ _ _ _ _ _ _ _ _
11.	VMware ESXi 5.5 License Key	ESXi 5.5 License Key:_ _ _ _ _ _ _ _ _ _ _
12.	Windows Server 2012 Local Administrator Password	User Name (default: **`Administrator`**): _ _ _ _ _ _ _ _ _ _ _ Current password: _ _ _ _ _ _ _ _ _ _ _ New password: _ _ _ _ _ _ _ _ _ _ _
13.	SMTP Settings (Optional settings for notifications)	SMTP Server Address: _ _ _ _ _ _ _ _ _ _ _ Port (default: `25`): _ _ _ _ _ _ _ _ _ _ _ Reply Address: _ _ _ _ _ _ _ _ _ _ _ Username: _ _ _ _ _ _ _ _ _ _ _ Password: _ _ _ _ _ _ _ _ _ _ _
14.	Notification Recipients – Optional	Email Addresses (comma-separated list): _ _ _ _ _ _ _ _ _ _ _

NOTES: