

# PlateSpin Forge<sup>®</sup> 4

## Rebuilding Forge 4 Appliance 2

June 14, 2014



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# Contents

<b>About NetIQ Corporation</b>	<b>5</b>
<b>About This Guide</b>	<b>7</b>
<b>1 Overview</b>	<b>9</b>
1.1 About the Forge 4.0 Rebuild Process .....	9
1.2 What You Need .....	9
<b>2 Configuring the RAID Controller (Conditional)</b>	<b>11</b>
2.1 Configuration for Dell PowerEdge R610/R620 Hardware .....	11
2.2 Configuration for Dell PowerEdge R710/R720 Hardware .....	12
<b>3 Installation Tasks</b>	<b>15</b>
3.1 Installing the Hypervisor and Forge Components .....	15
3.1.1 Installing ESX and the Forge 4 VM .....	15
3.1.2 Licensing and Initial Configuration .....	16
3.2 Backing Up the Factory VM .....	18
3.3 Restarting the Appliance .....	19
3.4 Configuring the Appliance for Immediate Use .....	19
3.5 Launching the PlateSpin Forge Web Client .....	19
3.6 Product Licensing .....	20
3.6.1 Online License Activation .....	20
3.6.2 Offline License Activation .....	20
<b>Glossary</b>	<b>23</b>



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## Our Viewpoint

### **Adapting to change and managing complexity and risk are nothing new**

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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.

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- ◆ Access Management
- ◆ Security Management
- ◆ Systems & Application Management
- ◆ Workload Management
- ◆ Service Management

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# About This Guide

This *Field Rebuild Guide* provides information about rebuilding and reconfiguring the Forge disaster recovery appliance by using the *Forge 4.0 Field Rebuild Kit*.

- ♦ [Chapter 1, “Overview,” on page 9](#)
- ♦ [Chapter 2, “Configuring the RAID Controller \(Conditional\),” on page 11](#)
- ♦ [Chapter 3, “Installation Tasks,” on page 15](#)
- ♦ [“Glossary” on page 23](#)

## Intended Audience

This guide is intended for technical staff, such as PlateSpin partners, who require the capability to rebuild the Forge appliance from scratch.

## Other Information in the Library

The library provides the following information resources:

### Getting Started Guide

Provides information about the basic steps required for setting up your PlateSpin Forge appliance.

### Upgrade Guide

Provides information about upgrading earlier versions of PlateSpin Forge to PlateSpin Forge 4.0.

### Help

Provides embedded guidance to assist users with common tasks as they access the user interface.

## Documentation Updates

The most recent version of this guide can be found at [PlateSpin Forge 4 Online Documentation Web Site \(https://www.netiq.com/documentation/platespin\\_forge\\_4/\)](https://www.netiq.com/documentation/platespin_forge_4/).





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# 1 Overview

This section includes the following information:

- ♦ [Section 1.1, “About the Forge 4.0 Rebuild Process,”](#) on page 9
- ♦ [Section 1.2, “What You Need,”](#) on page 9

## 1.1 About the Forge 4.0 Rebuild Process

Use the Forge 4 Rebuild Kit to rebuild PlateSpin Forge from version 1 to version 2. Before you begin this process, make sure that you remove any USB drives from the hardware appliance and have your ESX 4.1 license available (the older ESX 3.5 license will not be valid after you upgrade).

At a high level, the Forge 4.0, Appliance Version 2 rebuild process consists of the following major steps:

- ♦ (Conditional) Re-creating the RAID array on the appliance
- ♦ Setting up the system BIOS
- ♦ Re-installing the hypervisor
- ♦ Re-deploying Forge software (including the Forge Management VM and the Forge Appliance Configuration Console (Forge ACC))
- ♦ Re-licensing all components

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**NOTE:** The rebuild process erases all data in the Forge appliance's local storage.

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If you need only to revert the appliance to its factory default state, use the Factory Reset feature that the appliance ships with Forge 4.0. See [“Resetting Forge to Factory Defaults”](#) in the *PlateSpin Forge 4.0 User Guide*.

The complete rebuild instructions that are in this section should be used only when Factory Reset is not working or is not applicable (for example, after a major hardware failure that prevents Factory Reset from working, or when you are upgrading from an older version of the appliance).

## 1.2 What You Need

Before you start rebuilding Forge, make sure that you have the following prerequisites:

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A *Forge 4.0 Field Rebuild Kit*, containing: Contact PlateSpin Support to request a Kit.

- ♦ Forge 4.0 USB Flash Drive
  - ♦ Forge 4.0 Installation CD/DVD
  - ♦ This *Field Rebuild* guide.
-

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A VMware ESX 4.1 license	Contact PlateSpin Support for help to retrieve your license
A Windows license for the Forge VM 2003 Server	A Windows OEM Product Key sticker is attached to every PlateSpin Forge appliance and is located on the appliance's top cover. Contact PlateSpin Support if missing.
A PlateSpin Forge 4.0 license	Post-rebuild requirement for unlocking the product's business functionality.  See " <a href="#">Product Licensing</a> " in the <i>PlateSpin Forge 4.0 User Guide</i> .

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# 2 Configuring the RAID Controller (Conditional)

Use the information in this section if you need to reconfigure the RAID controller on the Forge 4 Appliance Hardware. Reconfiguring the RAID controller is not necessary unless you are adding or replacing hard disks in your Forge Appliance as part of the product rebuild.

- ♦ [Section 2.1, “Configuration for Dell PowerEdge R610/R620 Hardware,” on page 11](#)
- ♦ [Section 2.2, “Configuration for Dell PowerEdge R710/R720 Hardware,” on page 12](#)

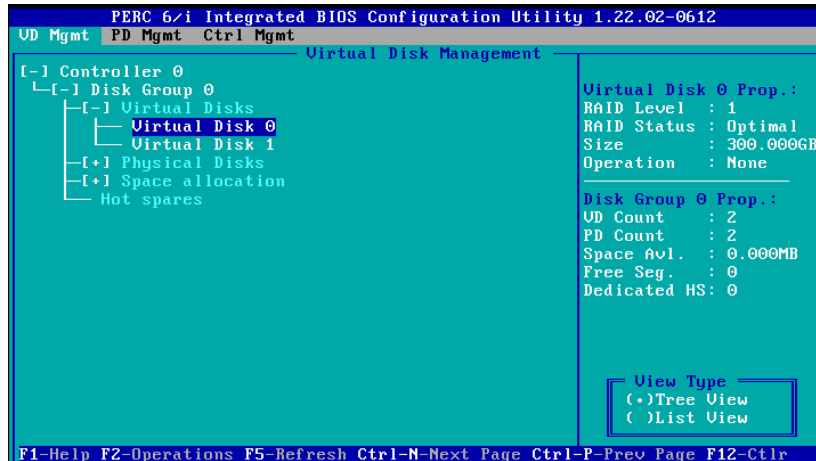
## 2.1 Configuration for Dell PowerEdge R610/R620 Hardware

The following RAID controller configuration procedure applies to Forge appliances based on Dell PowerEdge R610/R620 hardware.

**On first boot, you use the PERC 6/I Configuration utility to configure the RAID controller:**

- 1 At the RAID Controller boot prompt, approximately 10 seconds into the boot sequence, press Ctrl+R.
- 2 Configure the PERC RAID controller to have two logical disks consisting of two physical disks in RAID 1:
  - 2a Delete any existing disk groups:
    - 2a1 Select a disk group and press F2.
    - 2a2 Select **Delete Disk Group**.
    - 2a3 Repeat [Step 2a1](#) and [Step 2a2](#) for all existing disk groups.
  - 2b Create a new disk group for the Forge system:
    - 2b1 Select the controller and press F2.
    - 2b2 Select **Create New VD**, press Enter on **RAID Level**, then select **RAID 1**.
    - 2b3 Select both physical disks (disk sizes might vary).
    - 2b4 Under **Basic Settings**, fill in the following fields:
      - VD Size:** Use 307200 as the value.
      - VD Name:** Use `ForgeSystem` as the value.
  - 2c Create a new disk group for the failover VMs:
    - 2c1 Select the controller, select **Disk Group 0**, then press F2.
    - 2c2 Select **Add New VD**, then select **RAID 1**.
    - 2c3 Select both physical disks (disk sizes might vary).
    - 2c4 Allocate all remaining disk space for the VD size.
    - 2c5 Type `FailoverVMs` as the **VD Name** value, select **OK**, then press Enter.

- 2d Choose to fast-initialize both VD disks:
  - 2d1 Select a virtual disk and press F2.
  - 2d2 Select **Initialization > Fast Init**.
  - 2d3 Repeat [Step 2d1](#) and [Step 2d2](#) for the other VD disk, and select **OK** when you are prompted.
- 3 Verify that the final RAID configuration looks like the following:



- 4 Press Ctrl+Alt+Del if prompted. The server reboots.

## 2.2 Configuration for Dell PowerEdge R710/R720 Hardware

The following RAID controller configuration procedure applies to Forge appliances based on Dell PowerEdge R710/R720 hardware.

**On first boot, you use the PERC 5/I Configuration utility to configure the RAID controller:**

- 1 Press Ctrl+R at the RAID Controller boot prompt, approximately 24 seconds into the boot sequence:
- 2 Configure the PERC RAID controller to have multiple logical disks over a single RAID5 array:
  - 2a Delete any existing disk groups:
    - 2a1 Select a disk group and press F2.
    - 2a2 Select **Delete Disk Group**.
    - 2a3 Repeat [Step 2a1](#) and [Step 2a2](#) for all existing disk groups.
  - 2b Create a new disk group for the Forge system:
    - 2b1 Select the controller and press F2.
    - 2b2 Select **Create New VD**.
    - 2b3 Select the **RAID Level** value, press Enter, select **RAID 5** from the list, then press Enter again.
    - 2b4 Select all available physical disks by selecting a disk item and pressing the Spacebar (disk sizes might vary).
    - 2b5 Under **Basic Settings**, fill in the following fields:

**VD Size:** Use 307200 as the value.

**VD Name:** Use ForgeSystem as the value.

**2b6** Select **OK** and press **Enter**.

**2c** Create a new disk group for the failover VMs, each not exceeding 2TB in size:

**2c1** Select the controller, select **Disk Group 0**, then press **F2**.

**2c2** Select **Add New VD**.

**2c3** Select the **RAID Level** value, press **Enter**, select **RAID 5** from the list, then press **Enter** again.

**2c4** Under **Basic Settings**, fill in the following fields:

**VD Size:** Use 2000000 as the value.

**VD Name:** Use FailoverVMs1 as the value (use FailoverVMs2 if this is the second 2 TB disk).

**2c5** Select **OK** and press **Enter**.

**2d** Repeat [Step 2c](#) until all disk space has been allocated in chunks of 2000000 MB each, adjusting the names of each VD to be FailoverVMs2, FailoverVMs3, and so on.

When less than 2000000 MB remains, allocate all remaining space to the last VD.

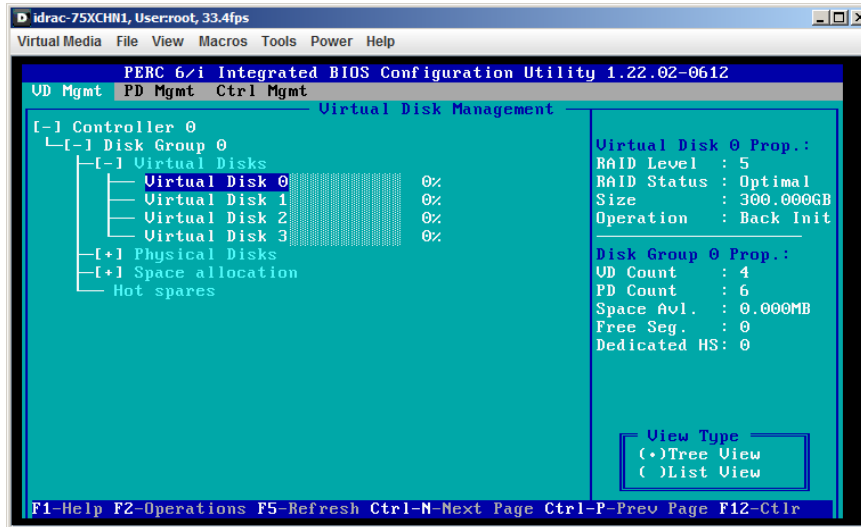
**2e** Fast-initialize the disks by performing the following steps for each virtual disk:

**2e1** Select a virtual disk and press **F2**.

**2e2** Select **Initialization > Fast Init**.

**2e3** Select **OK** and press **Enter** when you are prompted.

**3** Verify that the final RAID configuration looks like the following.



The number of disks might vary depending on how many 2TB chunks were allocated.

**4** Press **Esc** to exit the controller configuration utility.

**5** Press **Ctrl+Alt+Del** if prompted. The server reboots with the new settings.



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# 3 Installation Tasks

This section provides information about installing the hypervisor and Forge software components in your appliance.

- ♦ [Section 3.1, “Installing the Hypervisor and Forge Components,” on page 15](#)
- ♦ [Section 3.2, “Backing Up the Factory VM,” on page 18](#)
- ♦ [Section 3.3, “Restarting the Appliance,” on page 19](#)
- ♦ [Section 3.4, “Configuring the Appliance for Immediate Use,” on page 19](#)
- ♦ [Section 3.5, “Launching the PlateSpin Forge Web Client,” on page 19](#)
- ♦ [Section 3.6, “Product Licensing,” on page 20](#)

## 3.1 Installing the Hypervisor and Forge Components

This section provides information about installing the hypervisor and Forge software components in your appliance.

- ♦ [Section 3.1.1, “Installing ESX and the Forge 4 VM,” on page 15](#)
- ♦ [Section 3.1.2, “Licensing and Initial Configuration,” on page 16](#)

### 3.1.1 Installing ESX and the Forge 4 VM

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**IMPORTANT:** Before performing this procedure, ensure that any iSCSI or HBA connection to the SAN infrastructure is disconnected. Do not proceed until the cards are disconnected from the SAN.

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**To install VMware ESX 4.1 and the Forge 4 VM:**

- 1 Plug the *PlateSpin Forge 4 Rebuild Kit* USB flash drive into a USB port on the back of the PlateSpin Forge appliance.
- 2 Connect a keyboard and monitor to the PlateSpin Forge appliance.

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**WARNING:** The Dell Enhanced Multimedia USB Keyboard – Model:SK-8135 is known to cause issues. Do not use this keyboard.

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- 3 Power on the appliance and press F11 at the boot prompt.
- 4 Place the *Forge 4.0 Installation* CD into the CD-ROM/DVD drive.
- 5 When the system displays the boot menu (approximately 2 minutes after the previous step), select to boot from the **SATA Optical Drive**.
- 6 At the following prompt, select the **ESX Scripted Install for the Forge Appliance** option and press Enter.



The system displays a progress indicator while the installation runs through several phases. Wait until the installation process finishes and the server is rebooted.

#### 7 Monitor the prompts as the installation process proceeds.

After the ESX Server is installed, the system copies the Forge Management VM from the USB drive and deploys it in the appliance.

You should see the Copying data from the USB key... message for approximately 30 minutes, after which the server reboots. Upon rebooting, it runs the PlateSpin Forge VM registration script.

The process displays the ESX Welcome screen when the installation finishes successfully:

## 3.1.2 Licensing and Initial Configuration

Use the following set of procedures to access the hypervisor's inventory and the Forge VM to perform licensing and configuration tasks in order to finish rebuilding your appliance.

- ♦ "Setting up a Forge Administrative Computer" on page 16
- ♦ "Accessing the Hypervisor and the Forge VM" on page 17
- ♦ "Licensing the Hypervisor (VMware ESX)" on page 17
- ♦ "Licensing the Forge VM's Operating System" on page 17
- ♦ "Running the ForgeApplianceConfigurator Tool Inside the VM" on page 18

### Setting up a Forge Administrative Computer

For licensing and configuration tasks in this section, use the following procedure to reconnect your [administrative computer](#) to the [Forge Appliance Hardware](#). This requires downloading and installing the vSphere client, configuring with a static IP address in the same subnet as Forge, then reconnecting an administrative computer to the Forge Appliance Hardware.

#### To install the vSphere client on the administrative computer:

- 1 From a browser on the administrative computer, [download the vSphere Client](https://my.vmware.com/web/vmware/details?downloadGroup=VC55U1&productId=353). (<https://my.vmware.com/web/vmware/details?downloadGroup=VC55U1&productId=353>).
- 2 Run the vSphere Client installation .exe.

#### To configure up the network connection of the Forge administrative computer:

- 1 Access the TCP/IP properties of administrative computer's wired LAN adapter.
- 2 In the TCP/IP properties, use the following parameters:



**IP Address:** 192.168.1.x (replace x with any valid number. Do not use numbers 200 (used by the hypervisor) or 210 (used by the Forge VM).)

**Subnet:** 255.255.255.0

**Gateway:** N/A

- 3 Save the settings and close the LAN Properties applet.
- 4 Connect the administrative computer to the Forge Appliance Hardware either by using a crossover cable or through a network switch with a standard Ethernet cable.

## Accessing the Hypervisor and the Forge VM

To access the ESX hypervisor and the Forge VM from the administrative computer:

- 1 Launch the vSphere Client login, then connect to the PlateSpin Forge appliance by using these parameters:

**IP address:** 192.168.1.200

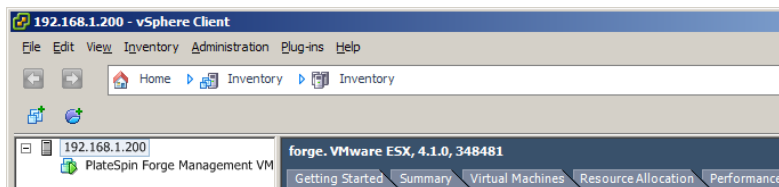
**User name:** root

**Password:** password

The vSphere Client program opens, connected to the hypervisor.

- 2 Click **Inventory**.

The tree view at the left displays the hypervisor inventory, which is the ESX node (192.168.1.200) and the Forge Management VM below it:



## Licensing the Hypervisor (VMware ESX)

To license VMware ESX 4.1 from the administrative computer:

- 1 In the vSphere Client tree view, select the ESX server node, click the **Configuration** tab, then click **Licensed Features**.
- 2 In the upper right corner, click **Edit** and select the **Assign a new license key to this host** option.
- 3 Specify your license key and click **OK**.
- 4 Click **OK** and exit the vSphere Client program.

## Licensing the Forge VM's Operating System

To license Microsoft Windows Server 2003:

- 1 In the vSphere Client program, select the **PlateSpin Forge Management VM** item and click the green **Play** button to power it on (if it is not already on).
- 2 Click the **Console** tab, then click inside the remote console window.
- 3 When you are prompted, specify the Windows OEM Product Key\* and click **Next**.

\*The Windows OEM Product Key sticker is attached to every PlateSpin Forge appliance. It is located on the top cover of the appliance.

- 4 When the Windows operating system is loaded, log in using Administrator and password. (ensure that you press Ctrl+Alt+Insert to log in to the VM).

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**NOTE:** You can activate your Windows license at this time, or you can wait to do so until after you finish configuring the Host and Appliance IP addresses and the VM is networked AND you can use an Internet connection to activate your Windows license. The disadvantage of the latter method is that on a factory reset you will need to activate the license on your Windows machine again.

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- 5 (Optional) If you want to activate your Windows license now, click **Start > All Programs > Activate Windows**.

The Windows Activation Wizard launches.

- 6 Select **Yes, I want to telephone a customer service representative to activate Windows** and click **Next**.
- 7 Follow the step-by-step procedure listed on the Activate Windows by phone dialog,

## Running the ForgeApplianceConfigurator Tool Inside the VM

To run the configuration tool:

- 1 In the vSphere Client program (see [Accessing the Hypervisor and the Forge VM](#)), click the **Console** tab to access the Forge VM's Windows interface, then double-click the **Configure Forge Appliance** shortcut on the desktop.
- 2 Monitor the process in the Command Prompt window and wait for the process to finish.

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**TIP:** You might experience connectivity issues to the Forge ESX Host during this time. If this occurs, reconnect when the service is available again.

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- 3 Shut down the Forge VM in Windows (**Start > Shut down**) and select the **Operating system reconfiguration (planned)** option.

## 3.2 Backing Up the Factory VM

To back up the Forge management VM:

- 1 At the Forge appliance's local console, press Alt+F2.
- 2 Log in as root (password: password).
- 3 At the console prompt, enter the following command:

```
python /usr/bin/forge/backup_forge_vm.py -f
```

Wait for the Python script to complete the factory backup process:

```
root@forgeToronto ~1# python /usr/bin/forge/backup_forge_vm.py -f
Shutting down the Forge VM
Start to backup. It will take about 30 minutes to finish.
Backup completed.
root@forgeToronto ~1# _
```

## 3.3 Restarting the Appliance

To restart the Forge 4 appliance software:

Some aspects of the appliance configuration do not take effect until the next boot. You must reboot the appliance to complete the rebuild process.

- 1 Remove the Forge USB flash drive and the *Forge 4.0 Installation CD*.
- 2 At the console prompt, enter the `reboot` command and press Enter.  
The shutdown sequence switches screens, hiding the shutdown process.
- 3 Press Alt+F2 to return to the screen displaying the shutdown sequence.  
Forge is now rebuilt and is in the same state as it was when it left the factory.

## 3.4 Configuring the Appliance for Immediate Use

To begin the configuration of the appliance, reconnect your administrative machine and use the browser-based Forge Appliance Configuration Console (Forge ACC) utility.

To configure the appliance:

- 1 Power on the appliance hardware.
- 2 Configure Forge by following the instructions in the “[Appliance Configuration Procedure](#)” section of the *PlateSpin Forge 4.0 Getting Started Guide*.

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**NOTE:** The *Getting Started Guide* is posted online at ([https://www.netiq.com/documentation/platespin\\_forge\\_4/forge\\_getstart/data/bookinfo.html](https://www.netiq.com/documentation/platespin_forge_4/forge_getstart/data/bookinfo.html)).

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## 3.5 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:

- ♦ *Mozilla Firefox*, version 29.0 and later
- ♦ *Google Chrome*, version 34.0 and later

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

- ♦ **Firefox:** Click **Tools** > **Options** > **Content**, then select the **Enable JavaScript** option.
  - ♦ **Chrome:** From the Chrome menu, select **Settings**, scroll to and select **Show advanced settings...**, select **Content Settings** > **Allow all sites to run JavaScript**.
- 

To launch the PlateSpin Forge Web Client from any computer:

- 1 Open a web browser and go to:  
`http://<hostname | IP_address>/Forge`  
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 is automatically redirected to the License Activation page.

## 3.6 Product Licensing

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

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

- ♦ [Section 3.6.1, “Online License Activation,” on page 20](#)
- ♦ [Section 3.6.2, “Offline License Activation,” on page 20](#)

### 3.6.1 Online License Activation

For online activation, the PlateSpin Forge Web Client must have Internet access.

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

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**To activate a Forge license online:**

- 1 In the PlateSpin Forge Web Client, click **Settings > Licenses > Add License**. The License Activation page is displayed.



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

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

### 3.6.2 Offline License Activation

For offline activation, the PlateSpin Forge Web Client must have Internet access.

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**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 email address registered with PlateSpin) as input for your Novell account username.

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**To activate a Forge license when offline:**

- 1** In the PlateSpin Forge Web Client, click **Settings > License**, then click **Add license**. The License Activation page is displayed.
- 2** Select **Offline Activation**.
- 3** Use your hardware ID to create a license key file at the [PlateSpin Product Activation website \(http://www.platespin.com/productactivation/ActivateOrder.aspx\)](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.



# Glossary

**administrative computer.** A Windows computer used externally from the Appliance Hardware to perform the rebuild. We recommend that you use a laptop for this process because the Forge Hardware Appliance build and the configuration procedure requires a direct connection to the Dell Hardware that is used as the Forge Appliance Host.

**appliance management software.** Software that uses either a terminal console (getty) or a proprietary, browser-based interface (Forge Appliance Configuration Console: ACC) to connect directly to an appliance for installation and configuration purposes (for example, setting the Host/VM IP addresses, Hostnames, and user password configuration).

**Forge Appliance.** A Forge Appliance Host containing a virtual machine running a Microsoft Windows OS with Forge software installed.

**Forge Appliance Hardware.** Dell hardware (PowerEdge R610, R710, R620 or R720) shipped by a PlateSpin hardware provider.

**Forge Appliance Host.** The VMware ESX software running on supported hardware.

**Forge installation/upgrade executable.** The executable file that upgrades the Forge Appliance software. The executable (also referred to as an “upgrade utility,”) is included in the *Forge 4 Rebuild Kit*.

**Forge software.** PlateSpin software engineered by NetIQ to protect a specific virtual workload (that is, an ESX VM’s operating system, middleware, and data) by using virtualization technology. If there is a production server outage or disaster, a virtualized replica of a workload can be rapidly powered on within the target container (a VM host), and continue to run as normal until the production environment is restored.

**rebuild.** The process of configuring the Forge Dell hardware, the Forge ESX Host, and the Forge Appliance that is running on Windows 2003 Server.

