PlateSpin® Recon 4

Getting Started Guide

January 2014

Legal Notice

Contents

About This Guide

This guide provides information about PlateSpin Recon.

Audience

This guide is intended for IT staff, such as data center administrators and operators, who use PlateSpin Recon in the data center management and planning.

Additional Documentation

This guide is part of the PlateSpin Recon documentation set. For a complete list of publications supporting this release, visit the PlateSpin Recon documentation Web site (http://www.novell.com/documentation/ps_recon4/).

For help with third-party vendor products or documentation, please contact your sales or support representative for those products.

Documentation Updates

For the most recent version of the PlateSpin Recon documentation, see the PlateSpin Recon documentation Web site (http://www.novell.com/documentation/ps_recon4/).

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1 Installing PlateSpin Recon

This section details the system requirements and installation steps for PlateSpin Recon.

1.1 System Requirements

1.1.1 PlateSpin Recon Server Hosts

The PlateSpin Recon Server hosts must meet the following system requirements:

Table 1-1 *System Requirements for PlateSpin Recon Server Hosts*

	Basic	Large-Scale
	◆ **For monitored and inventoried workloads:** Up to 100 workloads with PostgreSQL and up to 300 workloads with SQL Express ◆ **For only inventoried workloads:** Up to 5,000 workloads	◆ **For monitored and inventoried workloads:** 200 to 2,000 workloads ◆ **For only inventoried workloads:** Up to 10,000 workloads
Operating System	Any of the following operating systems (OS) for both basic and large-scale servers. English, French, German, and Japanese locales are supported, unless specified otherwise: ◆ Microsoft Windows Server 2008 R2 SP1 (64-bit) ◆ Microsoft Windows Server 2008 SP2 (32-bit, 64-bit) ◆ Microsoft Windows Server 2008 SP1 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 R2 SP2 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 SP2 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 SP1 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 (32-bit, 64-bit) However, for large-scale servers, NetIQ Corporation recommends recommend the following OS: ◆ Microsoft Windows Server 2008 R2 SP1 (64-bit) ◆ Microsoft Windows Server 2003 R2 SP2 (64-bit) **IMPORTANT** ◆ User Access Control (UAC) should be turned off on Windows Server 2008. For more information, refer to Knowledge Base article Q7012141 (http://www.netiq.com/support/kb/doc.php?id=7012141). ◆ To run the PlateSpin Recon Server on Windows Server 2008, you must use the built-in administrator account or the Windows Server 2008 Active Directory domain user account. Using **Run as Administrator** or other administrative account does not work.	
Processor	Pentium 4, 2.8 GHz with hyperthreading or later	Xeon 2.8 or 3.2 GHz dual core or multi-processor recommended
Virtual Machine	2 Virtual CPUs	Physical machine (recommended) or 2 Virtual CPUs
Memory	2 GB (4 GB recommended)	8 GB (16 GB recommended) **NOTE:** As the number of workloads increase, ensure that the memory is proportionately increased.

	Basic	**Large-Scale**
Disk Space	20 GB free	100 GB free
	NOTE: Disk space requirements depend on the number of monitored workloads and the amount of historical summary and raw utilization data stored in the database. When you use a remote SQL Server database, ensure that the database host has 2 GB of allocated space. The disk space requirements are based on 30 days of monitoring. At least one CPU core for every 500 monitored servers is recommended. For detailed information, see Section 1.1.4, "Database Growth Projections," on page 13.	
Database Engine	Any of the following: ♦ SQL Express 2008 R2 (for new installation of Recon 4 or later) ♦ PostgreSQL 8.3.4 (for upgrade only) ♦ Microsoft SQL Server 2008 R2 SP1 ♦ Microsoft SQL Server 2008 SP2 Enterprise database	♦ Microsoft SQL Server 2008 R2 SP1 ♦ Microsoft SQL Server 2008 SP2 Enterprise database ♦ Microsoft SQL Server 2005 SP2 with Windows Server 2008 SP2/SP1 ♦ Microsoft SQL Server 2005 SP0 with Windows Server 2003 SP2 ♦ Microsoft SQL Server 2000 SP3A+
Software	For both basic and large-scale servers: ♦ Microsoft IIS 5.0/6.0/7.5 (with ASP.NET) ♦ Microsoft .NET Framework 3.5 SP1 ♦ Microsoft Data Access Components (MDAC) 2.6 **IMPORTANT:** Ensure that Microsoft IIS is installed before installing Microsoft .NET Framework 3.5 SP1.	

1.1.2 PlateSpin Recon Client Hosts

The PlateSpin Recon Client hosts must meet the following system requirements:

Table 1-2 *System Requirements for PlateSpin Recon Client Hosts*

Component	Requirements
Operating System	Any of the following (either physical or virtual). English, French, German, and Japanese locales are supported, unless specified otherwise: ◆ Microsoft Windows 7 (32-bit, 64-bit) ◆ Microsoft Windows Server 2008 R2 SP1 (64-bit) ◆ Microsoft Windows Server 2008 SP2 (32-bit, 64-bit) ◆ Microsoft Windows Server 2008 SP1 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 R2 SP2 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 SP2 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 SP1 (32-bit, 64-bit) ◆ Microsoft Windows Server 2003 (32-bit, 64-bit) ◆ Microsoft Windows XP SP2 (English only) **NOTE:** To run the PlateSpin Recon Client on Windows Server 2008, you must use the built-in administrator account or the Windows Server 2008 Active Directory domain user account. Using **Run as Administrator** or other administrative account does not work.
Hardware	◆ **CPU:** Pentium 4, 2.0 GHz ◆ **Memory:** 2 GB ◆ **Disk Space:** 80 MB free
Software	◆ Microsoft .NET Framework 3.5 SP1

1.1.3 PlateSpin Recon in a Virtual Machine

You can install the PlateSpin Recon Server and the PlateSpin Recon Client software on a virtual machine (VMware ESX 3.*x*/4.*x*, VMware ESXi 5.0, Windows 2003 SP2 running on SUSE Linux Enterprise Server (SLES) 11.*x* Xen, and Windows Server 2008 R2 running on SUSE Linux Enterprise Server (SLES) 11 SP2 Xen 64-bit in a non-clustered environment). For detailed information about the server requirements, see Section 1.1.1, "PlateSpin Recon Server Hosts," on page 10, and for information about the client requirements, see Section 1.1.2, "PlateSpin Recon Client Hosts," on page 12.

Installing the PlateSpin Recon Server in a virtual machine restricts the monitoring and inventorying capabilities of the software to:

◆ 5,000 inventoried workloads
◆ 1,000 monitored workloads

1.1.4 Database Growth Projections

Table 1-3 *Database Growth Projections*

Machines	Time	Application DB	Performance DB
100	1 month	35 MB	1.6 GB
100	6 months	35 MB	10.5 GB
500	1 month	90 MB	10 GB
500	6 months	90 MB	20 GB
1,500	1 month	220 MB	18 GB
1,500	6 months	220 MB	90 GB
2,000	1 month	804 MB	60 GB
2,000	6 months	804 MB	71 GB
5,000	1 month	1409 MB	150 GB
5,000	6 months	1409 MB	177 GB
10,000	1 month	1628 MB	299 GB
10,000	6 months	1628 MB	354 GB

1.2 Installing PlateSpin Recon 4

1.2.1 Prerequisites

Before installing PlateSpin Recon, ensure that the following prerequisites are met:

❒ Ensure that Microsoft .NET Framework 3.5 SP1 is installed on the system where you want to install the PlateSpin Recon server.

❒ Ensure that you install the PlateSpin Recon server by using an account with administrative privileges.

❑ If you want to install the PlateSpin Recon server or client on Windows Server 2003, ensure that the system has the following:

 ◆ The Application Server role is installed (**Manage Your Server** or **Control Panel > Add or Remove Programs > Add/Remove Windows Components**). When choosing components, ensure that *ASP.NET* is selected.

 ◆ ASP.NET 1.*x* and ASP.NET 2.*x* are both set to **Allowed** (**IIS Manager >** *[local computer]* **> Web Service Extensions**).

❑ If you want to install the PlateSpin Recon server or client on Windows Server 2008, ensure that the system has the Web Server (IIS) role installed.

 1. From the **Start** menu, click **Administrative Tools > Server Manager.**

 2. In the left navigation pane, click **Roles**.

 3. In **Roles Summary**, click **Add Roles**, then click **Next**.

 4. Select **Web Server (IIS)**, then click **Next**.

 5. Click **Next**.

 6. On the Select Role Services page, add the following components:

 ◆ **Security > Windows Authentication**

 ◆ **Management Tools > IIS 6 Management Compatibility** (including all subcomponents)

 7. Click **Next**. Review the summary list.

 8. Click **Install**.

For more information, see the following Knowledge Base articles:

 ◆ Q7920728 (http://www.netiq.com/support/kb/doc.php?id=7920728)

 ◆ Q7920830 (http://www.netiq.com/support/kb/doc.php?id=7920830)

❑ If you want to install the PlateSpin Recon server on a Windows Server that has the IIS Web Server 7.0 or later running, ensure that the compatibility mode is set to Classic.

For more information, see the following Knowledge Base article:

 ◆ Q7011462 (http://www.netiq.com/support/kb/doc.php?id=7011462)

❑ Ensure that the following database requirements are met:

 ◆ A local or remote instance of either Microsoft SQL Server 2000/2005/2008 or SQL Express 2008 R2 is available.

 If neither a local or remote Microsoft SQL Server nor a SQL Express 2008 R2 Server is installed and you want to use a SQL Express 2008 R2 database, you can install it during the PlateSpin Recon installation. You can install the database on the same server where the PlateSpin Recon is installed or on any other system in the network.

 NOTE: If you choose to install PlateSpin Recon on a Windows Server 2003 R2 machine, you must ensure that a local or remote instance of Microsoft SQL Server 2000/2005/2008 is available because Windows Server 2003 R2 does not support SQL Express 2008 R2 database.

 ◆ Database access requires *public*, *datareader*, or *datawriter* roles. A user performing installation must be a member of the *sysadmin* fixed server role.

 ◆ If you choose to use a Microsoft SQL Server database, you can use Windows authentication mode or sa user credentials to connect to the database if PlateSpin Recon Server is installed on Windows Server 2003. If you install PlateSpin Recon Server on Windows Server 2008, you must use **sa** user credentials to connect to the database.

1.2.2 Downloading and Starting the PlateSpin Recon Installation Program

1 Download the PlateSpin Recon executable file from the Novell Downloads Web site (http://www.novell.com/download)

2 Double-click the executable file.

The PlateSpin Recon InstallShield Wizard is displayed.

3 Type a location to save the PlateSpin Recon files, or click the **Browse** button to browse for a location.

By default, the PlateSpin Recon files are extracted to a temporary directory.

4 Click **Extract**.

The PlateSpin Recon files are extracted and saved to the specified location. The PlateSpin Recon Installation Launcher is displayed.

5 (Conditional) If you do not have a local or a remote Microsoft SQL Server, or a SQL Express 2008 R2 Server installed and you want to use a SQL Express 2008 R2 database, continue with Section 1.2.3, "Installing the Embedded SQL Express 2008 R2 Database," on page 15.

1.2.3 Installing the Embedded SQL Express 2008 R2 Database

If you do not have a local or a remote Microsoft SQL Server or a SQL Express 2008 R2 Server installed, and if you want to use a SQL Express 2008 R2 database, you can install it during the PlateSpin Recon installation. You must install the database using an account with administrative privileges.

1 Before installing the embedded SQL Express 2008 R2 database, ensure that the following have been installed on the database machine:

❏ Windows Installer 4.5 or later

❏ Windows PowerShell 1.0

2 In the PlateSpin Recon Installation Launcher, click **Install Embedded SQL Express 2008 R2**.

This starts the SQL Express 2008 R2 Server unattended (silent) installation.

3 After the installation has completed, continue with Section 1.2.4, "Installing the PlateSpin Recon Server," on page 15. If the installation fails, reboot the database machine and repeat Step 2 through Step 3.

1.2.4 Installing the PlateSpin Recon Server

1 In the PlateSpin Recon Installation Launcher, click **Install Server** and follow the instructions in the PlateSpin Recon Server - InstallShield Wizard.

2 On the Welcome page, click **Next**.

3 (Conditional) If you are upgrading a previous instance of PlateSpin Recon, the Upgrade confirmation dialog box is displayed. Click **Yes** to continue.

4 If the terms of the license agreement are acceptable, select the **I accept the terms in the license agreement** option in the PlateSpin Recon Server - InstallShield Wizard and click **Next**.

5 Select a database engine to use with PlateSpin Recon and provide the credentials.

NOTE: For Windows Server 2003, the option to connect using Windows authentication credentials is available.

6 Click **Next**.

7 Do one of the following:

- ◆ To install in the default destination directory, click **Next**.
- ◆ To specify another location, click **Change**.

IMPORTANT

- ◆ For the installation path, you must ensure not to specify only a drive or an existing directory within the drive. However, you must create a new directory within the drive and specify the new directory path for installing Recon. This is because uninstalling Recon removes all the contents of the Recon installation directory. Consequently, any non Recon file present in the directory also gets deleted.

- ◆ By default, the installation path of a 32-bit machine (for example, `C:\Program Files (x86)\PlateSpin Recon 4 Server\`) is displayed even if you choose to install Recon on a 64-bit machine. Even if you change the path to a 64-bit machine installation path (for example, `C:\Program Files\PlateSpin Recon 4.0 Server\`), Recon gets installed in the default 32-bit machine installation path.

8 Click **OK**.

9 Click **Install** to begin the installation.

10 When the installation is complete, click **Finish**.

A message that the installation has completed successfully is displayed in the PlateSpin Recon Installation Launcher.

1.2.5 Installing the PlateSpin Recon Client

1 (Conditional) If the PlateSpin Recon Installation Launcher is not displayed, double-click the `PlateSpin Recon.exe` file that was downloaded from the Novell Downloads Web site (http://www.novell.com/download).

2 Click **Install Client** in the PlateSpin Recon Installation Launcher.

The PlateSpin Recon Client - InstallShield Wizard is displayed.

3 On the Welcome page, click **Next**.

4 (Conditional) If you are upgrading a previously installed instance of PlateSpin Recon, the Upgrade confirmation dialog box is displayed. Click **Yes** to continue.

5 If the terms of the license agreement are acceptable, select the **I accept the terms in the license agreement** option in the PlateSpin Recon Client - InstallShield Wizard and click **Next**.

6 Change the default destination directory if required.

IMPORTANT

- ◆ For the installation path, you must ensure not to specify only a drive or an existing directory within the drive. However, you must create a new directory within the drive and specify the new directory path for installing Recon. This is because uninstalling Recon removes all the contents of the Recon installation directory. Consequently, any non Recon file present in the directory also gets deleted.

- ◆ By default, the installation path of a 32-bit machine (for example, `C:\Program Files (x86)\PlateSpin Recon 4.0 Server\`) is displayed even if you choose to install Recon on a 64-bit machine. Even if you change the path to a 64-bit machine installation path (for example, `C:\Program Files\PlateSpin Recon 4.0 Server\`), Recon gets installed in the default 32-bit machine installation path.

7 Specify the IP address of the PlateSpin Recon Server and the port that is used by IIS on the server to connect to the PlateSpin Recon Server.

8 (Conditional) If you are installing the PlateSpin Recon Client on a remote server, replace `localhost` with the hostname or IP address of the PlateSpin Recon Server.

To change the values from within the client later, click **Tools > Options**, then click the **Client** tab. Edit the **Connection** node values as desired.

9 Click **Next**.

10 Click **Install**.

After the installation is complete, the InstallShield Wizard Completion page is displayed.

11 (Optional) If you want the PlateSpin Recon Client to be automatically launched after the installation, ensure that the **Launch PlateSpin Recon Client** option is selected. The option is selected by default.

12 Click **Finish**.

A message that the installation has completed successfully is displayed in the PlateSpin Recon Installation Launcher.

13 Click **Close** to exit the Installation Launcher.

If you select the **Launch PlateSpin Recon Client** option in Step 12, the PlateSpin Recon Client is automatically launched. To manually launch the PlateSpin Recon Client, do any of the following:

- On the desktop, double-click the **PlateSpin Recon** icon.
- From the desktop **Start** menu, click **Programs** > **PlateSpin** > **PlateSpin Recon** > **PlateSpin Recon Client**.

1.2.6 Installing the PlateSpin Recon Client on a Stand-Alone Device

You can install PlateSpin Recon on a stand-alone device that can be in a domain different from the domain of the PlateSpin Recon Server.

1 Ensure that the PlateSpin Recon Server to which you want to connect the PlateSpin Recon Client has PlateSpin Recon installed.

2 Download the PlateSpin Recon Client installer on the stand-alone device:

  2a Open a Web browser to the following address:

    http://*IP_address_of_PlateSpin_Recon_4.0_server*/platespin_400/recon_400/

  2b Click the **PlateSpin Recon Client Installer** link to download the installer (`setup.exe`) to a temporary location.

3 Double-click the `setup.exe` file that was downloaded in Step 2b.

The installer files are extracted to a temporary location, then the PlateSpin Recon Client - InstallShield Wizard is displayed.

4 On the Welcome page, click **Next**.

5 If the terms of the license agreement are acceptable, select the **I accept the terms in the license agreement** option in the PlateSpin Recon Client - InstallShield Wizard, then click **Next**.

The Destination Folder page is displayed.

6 Configure the following:

  6a (Optional) Change the default directory where you want to install the PlateSpin Recon Client.

> **IMPORTANT**
> - For the installation path, you must ensure not to specify only a drive or an existing directory within the drive. However, you must create a new directory within the drive and specify the new directory path for installing Recon. This is because uninstalling Recon removes all the contents of the Recon installation directory. Consequently, any non Recon file present in the directory also gets deleted.
> - By default, the installation path of a 32-bit machine (for example, `C:\Program Files (x86)\PlateSpin Recon 4.0 Server\`) is displayed even if you choose to install Recon on a 64-bit host machine. Change the path to a 64-bit machine installation path (for example, `C:\Program Files\PlateSpin Recon 4.0 Server\`).

6b Specify the IP address of the PlateSpin Recon Server to which you want to connect. By default, `localhost` is displayed as the DNS name of the PlateSpin Recon Server.

6c Specify the port that is used by IIS on the server to connect to the PlateSpin Recon Server. By default, it is 80.

6d Click **Next**.

7 Click **Install**.

After the installation is complete, the InstallShield Wizard Completion page is displayed.

8 (Optional) If you want the PlateSpin Recon Client to be automatically launched after the installation, ensure that the **Launch PlateSpin Recon Client** option is selected. The option is selected by default.

9 Click **Finish**.

If you selected the **Launch PlateSpin Recon Client** option in Step 8, the PlateSpin Recon Client login window is automatically displayed. For more information on how to log in to the PlateSpin Recon Client or how to manually invoke the PlateSpin Recon Client login window, see Section 1.2.7, "Logging In to the PlateSpin Recon Client," on page 18.

1.2.7 Logging In to the PlateSpin Recon Client

You can connect the PlateSpin Recon Client to the PlateSpin Recon Server whose IP address or DNS name you specified during the PlateSpin Recon Client installation. If you want to connect the client to a different PlateSpin Recon Server, see "How can I connect the PlateSpin Recon Client to a different PlateSpin Recon Server after installing the PlateSpin Recon Client?" on page 34.

You can connect the PlateSpin Recon Client to only one PlateSpin Recon Server at a time.

Perform the following tasks to log into the PlateSpin Recon Client:

1 (Conditional) If you did not select the **Launch PlateSpin Recon Client** option during the installation or upgrade of the PlateSpin Recon Client, perform one of the following actions to manually invoke the PlateSpin Recon Client login window:

- On the desktop, double-click the **PlateSpin Recon** icon.
- From the **Start** menu, click **Programs** > **PlateSpin** > **PlateSpin Recon** > **PlateSpin Recon Client**.

2 Connect to the PlateSpin Recon Server by logging in to the PlateSpin Recon Client:

- (Conditional) If the PlateSpin Recon Client is installed on the same device as the PlateSpin Recon Server:

  1. Select the **Use Windows Session Credentials** option.

     or

Specify the credentials of the local built-in administrator.

2. Click **Login**.

◆ (Conditional) If the PlateSpin Recon Client is installed on a stand-alone device that belongs to the same domain as the PlateSpin Recon Server:

1. Specify the login credentials of a user who belongs to the domain and who also has the domain admin group permission.

   You must specify the username in the following format: *domain_name\username*.

2. Click **Login**.

◆ (Conditional) If the PlateSpin Recon Client is installed on a stand-alone device that belongs to a domain different from the domain of the PlateSpin Recon Server:

1. Specify the login credentials of a user who belongs to the domain to which the PlateSpin Recon Server is connected and who also has the domain admin group permission.

   You must specify the username in the following format: *domain_name\username*.

2. Click **Login**.

1.3 Checking for Updates

Following the initial startup, PlateSpin Recon verifies whether an update is available. Version update status is displayed in the Update Availability dialog box. To avoid checking for updates every time PlateSpin Recon opens, select the **Do not check for update at startup** option.

NOTE: To manually check for version updates, click the **Help** menu in the PlateSpin Recon Client, then click **Check for Update**.

To reset the software update check:

1 On the PlateSpin Recon Client **Tools** menu, click **Options**.

  The Options dialog box is displayed.

2 Click the **Client** tab.

3 Under the **General** node, set the **Check for Software Update** value to **True**.

4 Click **OK**.

2 Upgrading PlateSpin Recon

The PlateSpin Recon 4 installer can upgrade PlateSpin Recon 3.7.4. If you choose to upgrade from versions prior to PlateSpin Recon 3.7.4, you must first upgrade to 3.7.4 followed by using the PlateSpin Recon 4 installer to upgrade from 3.7.4 to 4.0.

Perform the tasks in the following sections to upgrade to PlateSpin Recon 4:

- Section 2.1, "Pre-Upgrade Tasks," on page 21
- Section 2.2, "Upgrading to PlateSpin Recon 4," on page 22
- Section 2.3, "Upgrading to the Microsoft SQL Server 2008 SP2 Enterprise Database," on page 22
- Section 2.4, "Post-Upgrade Task," on page 22

2.1 Pre-Upgrade Tasks

Before upgrading to PlateSpin Recon 4, perform the following tasks:

- Section 2.1.1, "Generating Reports and Performing Consolidation Planning on the Existing Data," on page 21
- Section 2.1.2, "Backing Up the PlateSpin Recon Databases," on page 21

2.1.1 Generating Reports and Performing Consolidation Planning on the Existing Data

If your current version of PlateSpin Recon collects a large amount of inventory and monitoring data, NetIQ Corporation recommends that you generate reports and perform consolidation planning based on the existing data. The monitoring data for disk space utilization is collected after the deployment of the Windows Disk Counter add-on. For more information, see "Collecting Disk Utilization Counters for Windows Machines" in the *PlateSpin® Recon 4 User Guide*.

2.1.2 Backing Up the PlateSpin Recon Databases

PlateSpin Recon stores all inventory and monitoring data in a SQL Express 2008 R2 (applicable for Recon 4 or later), Microsoft SQL Server 2008, Microsoft SQL Server 2005, Microsoft SQL Server 2000 Server, or PostgreSQL (applicable for versions of Recon prior to 4.0) database. Prior to performing an upgrade, it is highly recommended that you back up the PlateSpin Recon databases.

1 Shut down all the clients.

   If you want to retain the previous backups, copy them to an alternate location prior to performing this backup.

2 Stop the PlateSpin Recon services.

For more information on how to stop the PlateSpin Recon services, see Section B.2, "Manually Stopping the PlateSpin Recon Services," on page 37.

3 Create a reliable backup of the PlateSpin Recon databases. For information about backing up the databases, refer to Knowledge Base article Q7921000 (https://www.netiq.com/support/kb/doc.php?id=7921000).

2.2 Upgrading to PlateSpin Recon 4

To upgrade PlateSpin Recon, follow the instructions in Section 1.2, "Installing PlateSpin Recon 4," on page 13, paying special attention to the upgrade information.

If you customize reports prior to performing an upgrade, you might see duplicate names in the list of report templates in the Report Explorer. This is to prevent your custom information from being deleted during an upgrade.

Depending on the result of the upgrade, do the following:

 * If the upgrade is successful, continue with Section 2.4, "Post-Upgrade Task," on page 22.

 * If the upgrade fails and you want to use the PlateSpin database, manually restore the database. For more information on how to restore the PlateSpin database, refer to Knowledge Base article Q7921000 (https://www.netiq.com/support/kb/doc.php?id=7921000).

2.3 Upgrading to the Microsoft SQL Server 2008 SP2 Enterprise Database

To upgrade to the Microsoft SQL Server 2008 SP2 Enterprise database:

1 After taking a backup of Microsoft SQL Server 2005, run the SQL Server 2008 installer.

2 Select the **Upgrade from SQL Server 2005** option.

While upgrading, the system might restart.

3 Stop the PlateSpin Recon service, PlateSpin Recon Monitoring service, and the World Wide Web Publishing service before you proceed with the upgrade.

For more information on how to stop the PlateSpin Recon services, see Section B.2, "Manually Stopping the PlateSpin Recon Services," on page 37.

4 After the database upgrade is successfully completed, you must install the Microsoft SQL Server 2008 SP2 Enterprise database.

5 After the installation of the Microsoft SQL Server 2008 SP2 Enterprise database is complete, launch the SQL Management Studio, then connect to the Microsoft SQL Server 2008 database.

Check whether the databases that you backed up are available.

6 Restart the PlateSpin Recon services mentioned in Step 3, then launch the Recon client.

2.4 Post-Upgrade Task

After upgrading to PlateSpin Recon 4, you must refresh the inventory of all the existing machines to get the new features available in PlateSpin Recon 4 by performing the following tasks:

1 In the Data Center Explorer, right-click the **All** node.

2 Click **Refresh Inventory** > **Now**.

3 Setting Up PlateSpin Recon Licenses

Each PlateSpin Recon server needs one instance of Recon license, which is tied with the server hardware. You do not need a license to install and use the PlateSpin Recon Client.

3.1 Understanding PlateSpin Recon Licenses

PlateSpin Recon provides several licensing options at the time of purchase. The license types cannot be combined. Licensing applies limits during inventory and monitoring, but not during discovery.

Based on their usage, PlateSpin Recon licenses are classified as follows:

- Section 3.1.1, "Per Use Licenses (Project Licenses)," on page 23
- Section 3.1.2, "Per Server Licenses," on page 23
- Section 3.1.3, "Per Core Licenses," on page 24

3.1.1 Per Use Licenses (Project Licenses)

Per Use licenses or Project Licenses limits the amount of time and the number of servers that can be monitored. For example, ten server-days allows monitoring one server for ten days or two servers for five days.

3.1.2 Per Server Licenses

PlateSpin Recon 4 introduces the Per Server licensing model. You cannot use Per Server licensing model for versions earlier than Recon 4. A Per Server license is tied to the monitoring of physical servers, virtual hosts, and VMs regardless of the operating system. It limits the number of workloads and virtual hosts that can be monitored at any point of time. Monitoring a server consumes one license irrespective of whether it is a virtual host or a workload.

If you have 15 Per Server licenses, you can monitor any combination of physical servers, virtual hosts, and VMs that totals up to 15 licenses.

For example:

- 8 physical servers and 7 virtual hosts
- 5 physical servers, 5 virtual hosts, and 5 VMs
- 5 virtual hosts and 10 VMs
- 15 physical servers
- 15 virtual hosts
- 15 VMs

Depending on whether you want to purchase a new Recon 4 license or upgrade an existing license, see the following scenarios:

- "Purchasing New Licenses" on page 24
- "Upgrading Existing Licenses" on page 24

Purchasing New Licenses

Assume that at any point of time you need to monitor 2 physical servers and 3 virtual hosts with 4 VMs on each host. The number of PlateSpin Recon licenses required is calculated as follows:

- **For 2 physical servers:** 2 licenses.
- **For 3 virtual hosts and all VMs hosted on them:** (3+ (3*4)) = 15 licenses.

The total number of PlateSpin Recon licenses you require is 17.

Upgrading Existing Licenses

If you upgrade from PlateSpin Recon 3.7.4 to PlateSpin Recon 4, you can continue to use the existing Per Core licenses unless you require additional licenses. For information on the Per core license, see Section 3.1.3, "Per Core Licenses," on page 24.

If you require additional licenses, contact our Sales Support team.

3.1.3 Per Core Licenses

Per Core Licenses are tied to physical cores for monitoring, regardless of the operating system, platform, or the number of servers involved. If you inventory both the host and the VMs, the PlateSpin Recon licenses are calculated based on the cores of the host only, and the virtual CPU count is ignored. If you inventory only the VMs and not the host, the PlateSpin Recon counts one core per one virtual CPU, and the licenses are consumed based on the number of virtual CPUs assigned to the VM.

For example, assume that you have two physical hosts, PH1 and PH2, in your network. PH1 has 2 cores and PH2 has 4 cores. Each host machine has 5 VMs running on it, and each VM has 2 vCPUs. Therefore, the total number of vCPUs on each physical host is 10 (5 VMs multiplied by 2 vCPUs). The total number of PlateSpin Recon licenses consumed is calculated as follows:

- **Scenario 1:** If you inventory and monitor both physical hosts and VMs, the total number of PlateSpin Recon licenses consumed is the sum of the all cores of PH1 and PH2. Therefore, the total number of PlateSpin licenses consumed is 6 (2 cores of PH1 + 4 cores of PH2).
- **Scenario 2:** If you inventory and monitor PH1 and the VMs of PH2, the total number of PlateSpin Recon licenses consumed is the sum of the all cores of PH1 and all vCPUs on PH2. Therefore, the total number of PlateSpin licenses consumed is 12 (2 cores of PH1 + 10 vCPUs of PH2).

For more information about Virtual Center licensing, see "Virtual Center" in the *PlateSpin® Recon 4 User Guide*.

3.2 Activating Your Product License

When you purchase PlateSpin Recon, you receive an email containing an activation code and product details at your registered email address. You must always use a corporate email address to register. After installation, launch PlateSpin Recon and click **Activate** to launch the License Wizard. It prompts you to choose either online or offline activation.

If you do not have a license activation code, request one through the Novell Customer Center Web site (http://www.novell.com/customercenter/). A license activation code is sent to the registered email address.

- Section 3.2.1, "Online Activation," on page 25
- Section 3.2.2, "Offline Activation," on page 25

3.2.1 Online Activation

Online activation requires Internet access. An activation code and the email address used to download the product are also required.

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

To activate the license online:

1 In the License Wizard, select the **Online Activation** option and click **Next**.

2 Specify the email address and activation code.

3 Click **Next** to obtain the PlateSpin Recon license.

   The PlateSpin Recon Client obtains the required license over the Internet and activates the PlateSpin Recon Server.

3.2.2 Offline Activation

A user name, password, activation code, valid registered email address, and hardware ID are required to get a license key file from the PlateSpin Activation site (http://www.platespin.com/productactivation/ActivateOrder.aspx).

To obtain the license key, you must have a Novell account. If you are an existing PlateSpin customer and you do not 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.

To activate the license offline:

1 In the License Wizard, select the **Offline Activation** option and click **Next**.

2 When prompted, enter the PlateSpin Recon license key file location.

   The PlateSpin Recon Client activates the PlateSpin Recon Server based on the license key file.

If you require any assistance, write to the following email address:

- **EMEA Customer:** Customer_CenterEMEA@novell.com
- **North America and APAC Customers:** Customerresolution@novell.com

3.3 Managing Licenses

All PlateSpin Recon licenses are displayed in the PlateSpin Recon License Manager window. To access PlateSpin Recon License Manager, navigate to **Tools** and click **License Manager** on the PlateSpin Recon Client toolbar.

3.3.1 Adding New Licenses

To add new licenses, click **Add**.

3.3.2 Deleting Expired Licenses

To delete expired licenses, select the licenses and click **Delete**.

3.3.3 Splitting the Licenses

There are cases when more than one PlateSpin Recon Server is needed, such as a system using a number of remote sites that provide distributed monitoring to a central site for analysis, or a very large data center that exceeds the capacity of one PlateSpin Recon Server.

If necessary, a purchased license can be split between 2 or more servers. For example, a Per Server license to monitor 1000 servers can be split into one license to monitor 400 servers and another to monitor 600. A Per Use license for 3000 server-days of monitoring can be split into one license for 1200 server-days and one license for 1800 server-days.

For more information about splitting licenses, refer to Knowledge Base article Q7920876 (https://www.netiq.com/support/kb/doc.php?id=7920876).

4 Configuring PlateSpin Recon

This section provides information about configuring PlateSpin Recon and your environment.

4.1 Network Ports

The following ports must be bi-directional and left open for use by PlateSpin Recon:

Table 4-1 *Required Port Access*

Port	Protocol	Port Usage Description
Discovery		
389	TCP	LDAP
3268	TCP	LDAP to Global Catalog
SNMP 161, 162	TCP/UDP	Standard SNMP
Inventory (Linux/VMware ESX 2.5 or earlier)		
22	TCP	SSH Port used when adding supported Linux servers or VMware ESX Servers
Inventory (VMware Infrastructure 3.*x*)		
22	TCP	SSH Port used
443	TCP	VMware Infrastructure Web Services port
Inventory (Windows Servers)		
137	TCP/UDP	Netbios-ns
138	TCP/UDP	Netbios Datagram Service
135 (WMI inventory only)	TCP	For DCOM/RPC communication because PlateSpin Recon utilizes WMI when adding Windows-based servers
389 (Domain Inventory only)	TCP	LDAP
3268 (Domain Inventory only)	TCP	LDAP to Global Catalog
445	TCP/UDP	microsoft-ds
1024-5000 (WMI inventory only)	TCP	Dynamic RPC range for WMI

Port	Protocol	Port Usage Description
Inventory (NetWare)		
524	TCP	Netware Inventorying
Monitoring		
22	TCP	Unix and Citrix Xen Monitoring
137	UDP	Netbios-ns
138	TCP	Netbios Datagram Service
445	TCP	
524	TCP	Netware Monitoring

4.2 Configuring Microsoft Windows Vista or Windows Server 2008

The following configurations are required or recommended to inventory Windows Vista or Windows Server 2008 with PlateSpin Recon:

- Section 4.2.1, "Enabling the Remote Registry Services," on page 28
- Section 4.2.2, "Configuring the Firewall for the Inventory with WMI," on page 28
- Section 4.2.3, "Enabling the File and Printer Sharing Exception in Windows Firewall," on page 29

4.2.1 Enabling the Remote Registry Services

Remote Registry services need to be turned on to allow PlateSpin Recon monitoring to function correctly.

To set the Remote Registry service to automatic start:

1 Click **Start**.

2 In the search block; type services.msc and press Enter.

3 Right-click the **Remote Registry** service, then select **Properties**.

4 Select **Automatic** as the startup type.

5 Click **OK**.

6 Restart the computer to complete the changes.

4.2.2 Configuring the Firewall for the Inventory with WMI

Inventory with Windows Management Instrumentation (WMI) needs to have firewall exception rules set up.

To allow inventory with WMI:

1 Click **Start > Control Panel > Windows Firewall**.

2 Click **Change Settings**.

The **Windows Firewall Settings** dialog box is displayed.

3 Click the **Exceptions** tab.

4 Enable the **Windows Management Instrumentation** check box.

5 Click **OK**.

6 Click **Start > Control Panel > System and Maintenance > Administrative Tools**.

7 Double-click **Windows Firewall with Advanced Security**.

The Windows Firewall with Advanced Security dialog box is displayed.

8 Click **Inbound Rules**.

The Inbound Rules are displayed.

9 Right-click the green/checked **Windows Management Instrumentation (Async-In)** rule and select **Properties**.

10 Click the **Scope** tab.

11 In the **Remote IP address** area, enable **Any IP address**.

12 Click **OK**.

13 Repeat Step 9 through Step 12 for the green/checked Inbound Rules **Windows Management Instrumentation (DCOM-In)** and **Windows Management Instrumentation (WMI-In)**.

4.2.3 Enabling the File and Printer Sharing Exception in Windows Firewall

To enable the file and printer sharing exception in Windows Firewall:

1 Click **Start > Control Panel > Windows Firewall**.

2 Click **Change Settings**.

The **Windows Firewall Settings** dialog box is displayed.

3 Click the **Exceptions** tab.

4 Select the **File and Printer Sharing** check box.

5 Click **OK**.

4.3 Configuring Monitoring for Citrix XenServer 5.*x*

Earlier versions of Citrix XenServer (such as 4.1) allowed instantaneous gathering of performance metrics, but changes to the XenServer API have deprecated this feature. Performance counters (CPU, Network, and Disk) return zero (0) in version 5.0 and later unless the XenServer Host is configured to gather the performance metrics by using the new API.

To configure Citrix XenServer performance monitoring:

1 On the XenServer host, enter the following in the console:

```
xe host-param-set other-config:rrd_update_interval=1 uuid=<host-uuid>
```

2 Restart the host.

PlateSpin Recon can now monitor Citrix XenServer 5.*x* and gather values for its performance counters. For more information, see Persistent XenServer Performance Statistics (http://docs.xensource.com/XenServer/5.0.0/1.0/en_gb/sdk.html#using_http).

5 Uninstalling PlateSpin Recon

The process to uninstall PlateSpin Recon depends on how it is installed. As a general guideline, use the following procedure:

1 (Conditional) If you deployed the Windows Disk Utilization Counter add-on, you must undeploy it from the target machines.

For detailed information on how to undeploy Windows Disk Utilization Counter add-on, see "Undeploying an Add-On" in the PlateSpin Recon User Guide *PlateSpin® Recon 4 User Guide*.

2 In Windows Add or Remove Programs (**Start** > **Settings** > **Control Panel**), remove the PlateSpin Recon Client, PlateSpin Server, and the database (SQL Express 2008 R2, Microsoft SQL Server 2000/2005/2008).

3 Manually delete the following items:

- The directory where you installed the PlateSpin Recon Server database during the PlateSpin Recon Server installation.
- The database files.

NOTE: Uninstalling PlateSpin Recon results in the following:

- Does not remove the Recon database tables from the database server.
- Removes all the contents of the Recon installation directory. Consequently, if you have specified only a drive or an existing directory within the drive as the Recon installation path, any non Recon file present in the installation directory also gets deleted.

A Troubleshooting

A

The following sections provide solutions to the problems you might encounter while installing or launching PlateSpin Recon:

The PlateSpin Recon Installation Launcher window is not properly displayed if you launch the installer by double-clicking launcher.hta

Source: PlateSpin Recon; Installation.

Explanation: After you download `PlateSpin Recon.exe` and extract the files, the PlateSpin Recon Installation Launcher window is automatically displayed. If you close the window and relaunch the installer by double-clicking `PlateSpin_Recon_file_extraction_location\launcher.hta`, the content in the PlateSpin Recon Installation Launcher window is not completely displayed.

Action: Relaunch the PlateSpin Recon Installation Launcher.

1 Double-click the downloaded `PlateSpin Recon.exe`.

2 Extract the file to a temporary directory.

The PlateSpin Recon Installation Launcher window is displayed with complete information.

Reinstalling PlateSpin Recon with the Microsoft SQL Server database fails

Source: PlateSpin Recon; Installation.

Explanation: If you do not delete the PlateSpin Microsoft SQL Server database directory after uninstalling PlateSpin Recon, and if you subsequently try to install PlateSpin Recon with the Microsoft SQL Server database engine on the same machine, the installation fails.

Possible Cause: The PlateSpin Microsoft SQL Server database directory is not deleted after you uninstall PlateSpin Recon.

Action: Do the following:

1 Close the PlateSpin Recon Installation Launcher window.

2 Manually delete the PlateSpin Microsoft SQL Server database directory.

3 Reinstall PlateSpin Recon.

The PlateSpin Recon Client might fail to launch

Source: PlateSpin Recon; Client.

Explanation: A temporary directory is automatically created within the system's `temp` directory to store temporary files when you launch the PlateSpin Recon Client for the first time in the user session. By default, the system's `temp` directory is located in the `c:\users\administrator\appdata\local\` directory on Windows Server 2008, and in the `c:\documents and settings\administrator\local settings\` directory on Windows Server 2003.

If you delete the newly created temporary directory and try to launch the PlateSpin Recon Client, you encounter the following error message:

```
Could not find a part of the path
C:\Users\Administrator\AppData\Local\Temp\temporary_directory
```

Action: Restart the machine that has the PlateSpin Recon Client installed, and relaunch the PlateSpin Recon Client.

Action: Log out and log in again to the machine that has the PlateSpin Recon Client installed, and relaunch the PlateSpin Recon Client.

How can I connect the PlateSpin Recon Client to a different PlateSpin Recon Server after installing the PlateSpin Recon Client?

Source: PlateSpin Recon Client.

Explanation: The PlateSpin Recon Client is connected by default to the PlateSpin Recon Server whose IP address or DNS name you specified during the PlateSpin Recon Client installation.

Action: To connect a PlateSpin Recon Client to a different PlateSpin Recon Server after installing the PlateSpin Recon Client:

1 In Windows Explorer, navigate to the `Application Data` directory of the logged-in user.

By default, the `Application Data` directory is located in `C\Documents & Settings\Administrator\Local settings\` on Windows Server 2003 and Windows XP, and in the `C:\Users\ADMINI~1\AppData\Local\` directory on Windows Server 2008.

2 Delete the contents of the `Platespin ULC` and `Platespin_ULC` directories.

3 Use a text editor to open the `PlateSpin.Recon.Client.exe.config` file, which is located in the PlateSpin Recon Client installation directory.

4 Replace the value of the `ServerHostName` setting with the IP address or the DNS name of PlateSpin Recon Server to which you want to connect the PlateSpin Recon Client

The default value of `ServerHostName` is `localhost`.

5 Save the configuration file.

6 Log in to the PlateSpin Recon Client.

Unable to launch the PlateSpin Recon client on 32-bit Windows Server 2008

Source: PlateSpin Recon Installation.

Explanation: If you install PlateSpin Recon Server on 32-bit Windows Server 2008 connected to a Windows 2003 domain, you cannot launch the PlateSpin Recon Client even though PlateSpin Recon has been successfully installed.

Possible Cause: PlateSpin Recon is not registered in IIS.

Action: You must install PlateSpin Recon Server on 32-bit Windows Server 2008 that is connected to Window 2008 domain.

B Starting and Stopping the PlateSpin Recon Services

PlateSpin Recon is made up of the PlateSpin Recon Monitoring Service and the PlateSpin Recon Service. If you want to manually start and stop these services, review the information in the following sections:

- Section B.1, "Manually Starting the PlateSpin Recon Services," on page 37
- Section B.2, "Manually Stopping the PlateSpin Recon Services," on page 37

B.1 Manually Starting the PlateSpin Recon Services

1 Open the Windows Services window in one of the following ways:.

- From the **Start** menu, click **Settings** > **Control Panel**, then double-click **Administrative Tools** > **Services**.
- From the desktop **Start** menu, click **Run**, type services.msc in the **Open** option, then click **OK**.

2 Start the PlateSpin Recon Monitoring Service and the PlateSpin Recon Service in one of the following ways:

- Right-click the PlateSpin Recon service you want to start, then click **Start**.
- Select the PlateSpin Recon service you want to start, then click the **Action** menu > **Start**.
- Select the PlateSpin Recon service you want to start, then click the ▸ icon on the toolbar.

B.2 Manually Stopping the PlateSpin Recon Services

1 Open the Windows Services window in one of the following ways:.

- From the desktop **Start** menu, click **Settings** > **Control Panel**, then double-click **Administrative Tools** > **Services**.
- From the desktop **Start** menu, click **Run**, type services.msc in the **Open** option, then click **OK**.

2 Stop the PlateSpin Recon Monitoring Service and the PlateSpin Recon Service in one of the following ways:

- Right-click the PlateSpin Recon service you want to stop, then click **Stop**.
- Select the PlateSpin Recon service you want to stop, then click the **Action** menu > **Stop**.
- Select the PlateSpin Recon service you want to stop, then click the ■ icon on the toolbar.

C C Best Practices

These best practices are designed for data center operators and administrators who use PlateSpin Recon to monitor workloads and do consolidation planning based on collected data. The information provided here has been compiled by the PlateSpin support team based on experience with hundreds of Real-Time Consolidation Accelerator users.

Where applicable, guidelines in the best practices refer to PlateSpin Support Knowledge Base articles. To access the articles, use your PlateSpin download credentials. If you have forgotten your password, you can request a password reminder email at: http://www.platespin.com/downloads/forgotpassword.aspx (http://www.platespin.com/downloads/forgotpassword.aspx)

C.1 Best Practices: Planning

Guideline	Knowledge Base Article
Ensure that servers you plan to monitor are running on platforms and operating systems supported by PlateSpin Recon, and that they meet all software requirements.	Q7920909 (https://www.netiq.com/support/kb/doc.php?id=7920909) : Supported platforms for Inventory and Data Collection Q7920729 (https://www.netiq.com/support/kb/doc.php?id=7920729) : What PlateSpin Recon requires to add a server to its inventory
Plan your project and define the following parameters: • Number of servers to monitor • Duration of monitoring period	
Order the proper PlateSpin Recon licenses based on project parameters defined above. Use the License Entitlement Manager Web portal to view license orders and manage activation codes.	Q7920876 (https://www.netiq.com/support/kb/doc.php?id=7920876) : PlateSpin License Entitlement Manager

C.2 Best Practices: Installation and Setup

Guideline	Knowledge Base Article
Ensure that the designated PlateSpin Recon Server is compliant with the minimum system requirements.	Q7920904 (https://www.netiq.com/support/kb/doc.php?id=7920904) : System Requirements for PlateSpin Recon
Consider recommended hardware specifications for various project sizes. PlateSpin Recon 3.7 supports up to 2,000 workloads per Server.	
For large-scale projects (2,000 - 10,000 workloads) use multiple PlateSpin Recon collectors. Centralize analysis and planning by automatically and securely synchronizing data from collectors to a secure master instance of PlateSpin Recon.	
Ensure that the PlateSpin Recon Server has enough disk space for the projected database growth based on the number of workloads you plan to monitor.	Q7920910 (https://www.netiq.com/support/kb/doc.php?id=7920910) : How large the PlateSpin Recon Database will grow
Set up designated PlateSpin Recon user accounts with administrative rights.	Q7920726 (https://www.netiq.com/support/kb/doc.php?id=7920726) : PlateSpin Recon Best Practices for User Accounts
To inventory virtual machines hosted by VMware GSX Server, install the VmCOM API on the PlateSpin Recon server (otherwise the VMs will not be visible).	Q7920516 (https://www.netiq.com/support/kb/doc.php?id=7920516) : Installing the VMware GSX Server VmCOM API on the PlateSpin Recon server.

C.3 Best Practices: Upgrade

Before upgrading to PlateSpin Recon, it is recommended that you take a snapshot of all the existing PlateSpin Recon data. For more information on snapshots, see "Working with PlateSpin Recon Snapshots" in the *PlateSpin® Recon 4 User Guide.*