

PlateSpin Forge® 11.3

Getting Started Guide

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License Grant

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

Additional Documentation

For the most recent version of this guide and other PlateSpin Forge documentation resources, visit the [PlateSpin Forge Documentation \(https://www.netiq.com/documentation/platespin-forge/\)](https://www.netiq.com/documentation/platespin-forge/) website.

In addition to English, online documentation is available in these national languages: Chinese Simplified, Chinese Traditional, French, German, Japanese, and Spanish.

Contact Information

We want to hear your comments and suggestions about this book and the other documentation included with this product. You can use the [comment on this topic](#) link at the bottom of any HTML page of the English version of the documentation, or send an email to Documentation-Feedback@microfocus.com.

For specific product issues, contact Micro Focus Customer Care at <https://www.microfocus.com/support-and-services/>.

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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.

- ♦ “Before You Begin” on page 7
- ♦ “Appliance Configuration Procedure” on page 7
- ♦ “Launching the PlateSpin Forge Web Interface” on page 9
- ♦ “Product Licensing” on page 10
- ♦ “Post-Setup Tasks” on page 11

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/) (<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 13](#) to record the configuration of your current environment.
3. **Set up the hardware:** Unpack the PlateSpin Forge appliance and use the contents of this guide to help you mount and connect the hardware.

Appliance Configuration Procedure

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

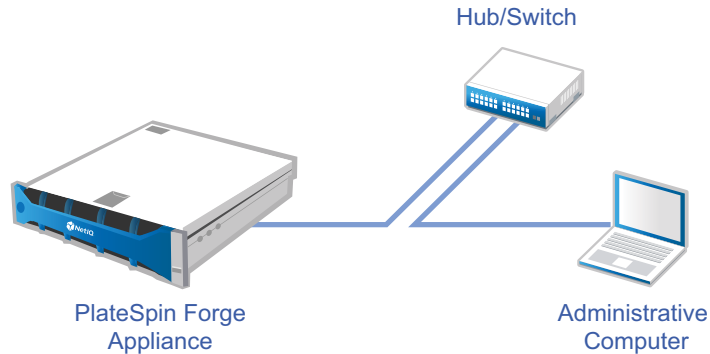
1. Configuring the appliance host (VMware ESXi, which is the hypervisor component of the product).
2. Configuring the Forge Management VM (a Windows virtual machine with application logic running on the host).
3. Activating your product license.

Fill out the “[PlateSpin Forge Configuration Worksheet](#)” on [page 13](#) before you start this procedure.

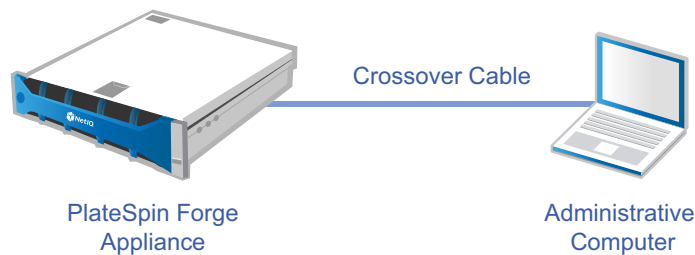
To begin the installation and configuration of the appliance, you need to connect to it directly through another computer (also referred to as the *administrative computer*) and use the browser-based Forge Appliance Configuration Console (ACC) utility. For flexibility and mobility, consider using a notebook 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 7](#).
- 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 administrative 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, ensuring 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 Management VM

-
- 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.

For a list of supported browsers, see [“Launching the PlateSpin Forge Web Interface” on page 9](#).

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- 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, using the drop-down menu.

- 8 Log out of the Forge ACC, then click **Return home**.
- 9 Log in using the `forgeuser` account with the password that 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, then click **Apply**.
- 12 Click **Continue**.
- 13 After 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_address>: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, then click **Apply**.
- 18 At the summary page, click **Continue** and wait for the VM configuration to complete.
- 19 Navigate to the Forge UI at `http://<Forge_Management_VM_IP_address>/Forge`.
- 20 Log in using the default credentials for the Forge VM (username: Administrator, password: Password1).

Launching the PlateSpin Forge Web Interface

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

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.

To launch the PlateSpin Forge Web Interface:

- 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 Management 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.

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 \(http://www.netiq.com/customercenter/\)](http://www.netiq.com/customercenter/). A license activation code will be emailed to you.

NOTE: If you are an existing PlateSpin customer and you don't have a Customer Center account, you must first create one, using the same email address as specified in your purchase order. See [Create Account \(https://www.netiq.com/selfreg/jsp/createAccount.jsp\)](https://www.netiq.com/selfreg/jsp/createAccount.jsp).

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

- ♦ “Online License Activation” on page 10
- ♦ “Offline License Activation” on page 10

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 Interface, click **Add PlateSpin Forge License > Add License**.
- 2 On the License Activation page, select **Online Activation**, then specify the email address that you provided when you placed 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.

Offline License Activation

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

To activate a license offline, use the following steps:

- 1 In the PlateSpin Forge Web Interface, click **Add PlateSpin Forge License > Add License**.
- 2 On the License Activation page, select **Offline Activation** and copy the hardware ID shown.
- 3 In a different browser tab or window, go to the [PlateSpin Product Activation website \(http://www.platespin.com/productactivation/ActivateOrder.aspx\)](http://www.platespin.com/productactivation/ActivateOrder.aspx), then use your hardware ID to create a license key file. This process requires the email address that you provided when you placed your order, as well as the activation code you received.
- 4 In the PlateSpin Forge Web Interface, type the path to the file or browse to its location, then click **Activate**.

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

Post-Setup Tasks

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

- ☐ (Optional, strongly recommended) Modify the password for the SQL Server Express system administrator user. See [“Modifying the Password for the SQL Server System Administrator User”](#) in the *PlateSpin Forge User Guide*.
- ☐ (Optional; for international versions) Set up PlateSpin Forge and your browser for use in a specific supported language. See [“Configuring Language Settings for International Versions”](#) 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 Networking”](#) in the *PlateSpin Forge User Guide*.
- ☐ (Optional) Set up appropriate role-based access settings as required by your organization. See [“Configuring User Authorization and Authentication”](#) in the *PlateSpin Forge User Guide*. In particular, ensure that you immediately change the default Administrator password (see [“Modifying the Administrator User Password for the Forge VM”](#)).
- ☐ Configure SMTP settings and add email notification recipients. See [“Configuring Email Notification Services for Events and Replication 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 Web Interface (see [“Managing Multiple PlateSpin Servers in the Management Console”](#) in your *PlateSpin Forge 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.

Appliance Setup Parameters for Reference

Parameters	Details
1. Forge Superuser/ <i>root</i> (a.k.a. Forge Virtual Host)	Login: root Password (default: password1): _____
2. Appliance Host Network Information	IP address: _____ Netmask: _____ Default Gateway (router) IP address: _____ DNS Server IP address: _____ Hostname (such as <i>forge</i>): _____
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 <ul style="list-style-type: none">♦ IP address: _____♦ Netmask: _____♦ Default Gateway (router) IP address: _____♦ DNS Server IP address: _____♦ Hostname: _____♦ DNS Suffix: _____

NOTES:

Parameters	Details
6. Join workgroup or domain	<input type="checkbox"/> Skip <input type="checkbox"/> Yes <ul style="list-style-type: none"> <input type="checkbox"/> Domain <ul style="list-style-type: none"> Domain name: _____ Domain user: _____ Domain password: _____ <input type="checkbox"/> Workgroup <ul style="list-style-type: none"> Workgroup name: _____
7. Forge Web Interface Credentials	Username (default: Administrator): _____ Password (default: Password1): _____
8. PlateSpin Forge License Activation	<input type="checkbox"/> Online Activation <ul style="list-style-type: none"> Email Address (that you specified in the product order): _____ Activation Code (from NCC): _____ <input type="checkbox"/> Offline Activation <ul style="list-style-type: none"> 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): _____ _____

Parameters	Details
NOTES:	

