



PlateSpin Forge® 11.1

Rebuilding Forge Appliance 3

March 2015

Legal Notice

THIS DOCUMENT AND THE SOFTWARE DESCRIBED IN THIS DOCUMENT ARE FURNISHED UNDER AND ARE SUBJECT TO THE TERMS OF A LICENSE AGREEMENT OR A NON-DISCLOSURE AGREEMENT. EXCEPT AS EXPRESSLY SET FORTH IN SUCH LICENSE AGREEMENT OR NON-DISCLOSURE AGREEMENT, NETIQ CORPORATION PROVIDES THIS DOCUMENT AND THE SOFTWARE DESCRIBED IN THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. SOME STATES DO NOT ALLOW DISCLAIMERS OF EXPRESS OR IMPLIED WARRANTIES IN CERTAIN TRANSACTIONS; THEREFORE, THIS STATEMENT MAY NOT APPLY TO YOU.

For purposes of clarity, any module, adapter or other similar material ("Module") is licensed under the terms and conditions of the End User License Agreement for the applicable version of the NetIQ product or software to which it relates or interoperates with, and by accessing, copying or using a Module you agree to be bound by such terms. If you do not agree to the terms of the End User License Agreement you are not authorized to use, access or copy a Module and you must destroy all copies of the Module and contact NetIQ for further instructions.

This document and the software described in this document may not be lent, sold, or given away without the prior written permission of NetIQ Corporation, except as otherwise permitted by law. Except as expressly set forth in such license agreement or non-disclosure agreement, no part of this document or the software described in this document may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, or otherwise, without the prior written consent of NetIQ Corporation. Some companies, names, and data in this document are used for illustration purposes and may not represent real companies, individuals, or data.

This document could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein. These changes may be incorporated in new editions of this document. NetIQ Corporation may make improvements in or changes to the software described in this document at any time.

U.S. Government Restricted Rights: If the software and documentation are being acquired by or on behalf of the U.S. Government or by a U.S. Government prime contractor or subcontractor (at any tier), in accordance with 48 C.F.R. 227.7202-4 (for Department of Defense (DOD) acquisitions) and 48 C.F.R. 2.101 and 12.212 (for non-DOD acquisitions), the government's rights in the software and documentation, including its rights to use, modify, reproduce, release, perform, display or disclose the software or documentation, will be subject in all respects to the commercial license rights and restrictions provided in the license agreement.

© 2015 NetIQ Corporation. All Rights Reserved.

For information about NetIQ trademarks, see <https://www.netiq.com/company/legal/>.

License Grant

Licenses purchased for PlateSpin Forge 11 or later versions cannot be used for PlateSpin Forge 3.3 or prior versions.

Third-Party Software

Please refer to the *PlateSpin Third-Party License Usage and Copyright* (https://www.netiq.com/documentation/platespin_licensing/platespin_licensing_qs/data/platespin_licensing_qs.html) page for information about third party software used in PlateSpin Forge.

Contents

About This Guide	5
About NetIQ Corporation	7
1 Overview	9
1.1 About the Forge 11.1 Rebuild Process.	9
1.2 What You Need	10
2 Reconfiguring the RAID Controller (Conditional)	11
3 Installation Tasks	15
3.1 Installing the Hypervisor and Forge Components	15
3.1.1 Installing VMware ESXi 5.5.0 to the Appliance	15
3.1.2 Reconnecting the Forge Administrative Computer	16
3.2 Licensing Microsoft Products on the Forge Management VM	19
3.2.1 Licensing Windows Server 2012	19
3.2.2 Licensing the SQL Server 2014.	21
3.3 Licensing the ESXi 5.5 Hypervisor.	21
3.4 Running the Forge Appliance Configurator	22
3.5 Backing Up the Factory VM	22
3.6 Restarting the Appliance	23
3.7 Configuring the Appliance for Immediate Use	23
3.8 Launching the PlateSpin Forge Web Client	23
3.9 Licensing the Forge Product	24
3.9.1 Online License Activation	24
3.9.2 Offline License Activation.	25
3.10 Installing the Hypervisor and Forge Components	25
3.10.1 Installing VMware ESXi 5.5.0 to the Appliance	25
3.10.2 Reconnecting the Forge Administrative Computer	26
3.11 Licensing Microsoft Products on the Forge Management VM	29
3.11.1 Licensing Windows Server 2012	29
3.11.2 Licensing the SQL Server 2014.	31
3.12 Licensing the ESXi 5.5 Hypervisor.	31
3.13 Running the Forge Appliance Configurator	32
3.14 Backing Up the Factory VM	32
3.15 Restarting the Appliance	33
3.16 Configuring the Appliance for Immediate Use	33
3.17 Launching the PlateSpin Forge Web Client	34
3.18 Licensing the Forge Product	34
3.18.1 Online License Activation	34
3.18.2 Offline License Activation.	35
4 Troubleshooting	37
4.1 Log File Locations	37
4.2 Errors Occurring During ESXi Installation	37
Glossary	39

About This Guide

This *Field Rebuild Guide* provides information about rebuilding and reconfiguring the Forge disaster recovery appliance by using the *Forge 11.1 Field Rebuild Kit*.

Intended Audience

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

Information in the Library

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

The PlateSpin Forge library provides the following information resources:

Release Notes

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

Getting Started Guide

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

User Guide

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

Rebuild Guide

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

Upgrade Guide

Provides information about how to upgrade the appliance software.

Help

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

Additional Resources

We encourage you to use the following additional resources online:

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

About NetIQ Corporation

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

Our Viewpoint

Adapting to change and managing complexity and risk are nothing new

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

Enabling critical business services, better and faster

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

Our Philosophy

Selling intelligent solutions, not just software

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

Driving your success is our passion

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

Our Solutions

- ♦ Identity & Access Governance
- ♦ Access Management
- ♦ Security Management
- ♦ Systems & Application Management
- ♦ Workload Management
- ♦ Service Management

Contacting Sales Support

For questions about products, pricing, and capabilities, contact your local partner. If you cannot contact your partner, contact our Sales Support team.

Worldwide:	www.netiq.com/about_netiq/officelocations.asp
United States and Canada:	1-888-323-6768
Email:	info@netiq.com
Website:	www.netiq.com

Contacting Technical Support

For specific product issues, please contact our Technical Support team.

Worldwide:	www.netiq.com/support/contactinfo.asp
North and South America:	1-713-418-5555
Europe, Middle East, and Africa:	+353 (0) 91-782 677
Email:	support@netiq.com
Website:	www.netiq.com/support
Product Specific Information:	https://www.netiq.com/support/kb/product.php?id=PlateSpin_Forge

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

Contacting Documentation Support

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

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

Contacting the Online User Community

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

1 Overview

This section includes the following information:

- ♦ [Section 1.1, “About the Forge 11.1 Rebuild Process,” on page 9](#)
- ♦ [Section 1.2, “What You Need,” on page 10](#)

1.1 About the Forge 11.1 Rebuild Process

Use the *PlateSpin Forge 11.1 Appliance Upgrade/Rebuild Kit* to rebuild PlateSpin Forge Appliance Version 3. Before you begin this process, make sure that you have your VMware ESXi 5.5 license available.

At a high level, the Forge 11.1, Appliance Version 3* rebuild process consists of the following major tasks:

- ☐ (Conditional) Re-create the RAID array on the appliance*
- ☐ Set up the system BIOS
- ☐ Re-install the hypervisor
- ☐ Re-deploy Forge software (including the Forge Management VM and the Forge Appliance Configuration Console (Forge ACC))
- ☐ Re-license all components

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

If you need only to revert the appliance to its factory default state, use the Factory Reset feature that the appliance ships with Forge 11.1. See “[Resetting Forge to Factory Defaults](#)” in the *PlateSpin Forge 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).

* If you upgraded your Forge Appliance to version 11.0 from an earlier release prior to this rebuild, you will be reconfiguring the RAID controller for Forge Appliance Version 2 on earlier hardware.

[Table 1-1](#) provides information that can help you identify the RAID configuration that applies to the Forge Appliance that you purchased. For additional technical specifications, see [The PlateSpin Forge Product Information web page \(https://www.netiq.com/products/forg/technical-information/\)](#).

Table 1-1 RAID configuration for Forge Appliances

Forge Series ID	Hardware Model	Disk Array	RAID
Forge 300	Dell PowerEdge R610	2 x 500 GB	RAID 1
	Dell PowerEdge R620	2 x 500 GB	

Forge Series ID	Hardware Model	Disk Array	RAID
Forge 500	Dell PowerEdge R710	6 x 750 GB	RAID 5
	Dell PowerEdge R720	6 x 1 TB	
Forge 700	Dell PowerEdge R720	8 x 4 TB	RAID 6
	Dell PowerEdge R730xd		

For information about configuring the RAID controller for rebuild, see [Chapter 2, “Reconfiguring the RAID Controller \(Conditional\),” on page 11](#).

1.2 What You Need

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

A *Forge 11.1 Field Rebuild Kit*, containing: Contact [Technical Support](#) to request a Kit.

- ♦ Forge 11.1 OVF template files
- ♦ Forge 11.1 Installation CD/DVD
- ♦ This *Field Rebuild* guide.

A VMware ESXi 5.5 license Contact [Technical Support](#) for help to retrieve your license.

A Microsoft SQL 2014 Standard Edition license Contact [Technical Support](#) for help to retrieve your license.

A Windows license for the Forge VM 2012 Server A Windows OEM Product Key sticker is attached to every PlateSpin Forge appliance and is located on the appliance's top cover. Contact [Technical Support](#) if the sticker is missing.

A PlateSpin Forge 11.1 license Post-rebuild requirement for unlocking the product's business functionality.
See “[Product Licensing](#)” in the *PlateSpin Forge User Guide*.

2 Reconfiguring the RAID Controller (Conditional)

Use the information in this section if you need to reconfigure the RAID controller on the Forge 11.1 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.

For more information about choosing which RAID controller you should select for reconfiguring, see [Table 1-1 on page 9](#).

On first boot, you use the PERC 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 RAID array (that is, a RAID 1, a RAID 5, or a RAID 6, based on your hardware):
 - 2a Delete any existing disk groups:

IMPORTANT: Remember, deleting a disk group also deletes the data on that disk group.

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 [the RAID controller type you need](#) 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: If the PERC Controller displays the disk size in MB, enter 307200. If the disk size is displayed in GB, enter 300.

VD Name: Use `ForgeSystem` as the value.

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

2c Create a new disk group for the Forge failover VMs:

2c1 On the *Virtual Disk* page tree view, select **Disk Group: 0, RAID_** (see [Step 2b3](#)) and press F2 to open the Operations dialog box.

2c2 In the dialog box, select **Add New VD** to open the *Add VD in Disk Group 0* page.

2c3 On this the page, configure the new virtual disk for the failover by completing the following fields:

- ♦ **VD Size:** Depending on the appliance you have, use the remaining disk space value as your default backup storage.

- ♦ **VD Name:** Enter FailoverVMs.

Click **OK** when these fields are completed.

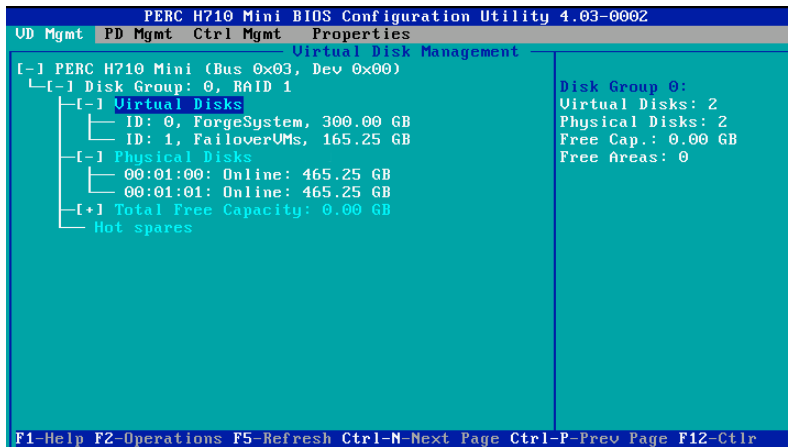
2d Configure the VD disks: to fast initialize:

2d1 On the *Virtual Disk* page tree view, select **Virtual Disks** > <disk_name> and press F2 to open the Operations dialog box.

2d2 In the dialog box(es), select **Initialization** > **Fast Init.** > **OK**.

2d3 Repeat [Step 2d1](#) and [Step 2d2](#) for each virtual disk.

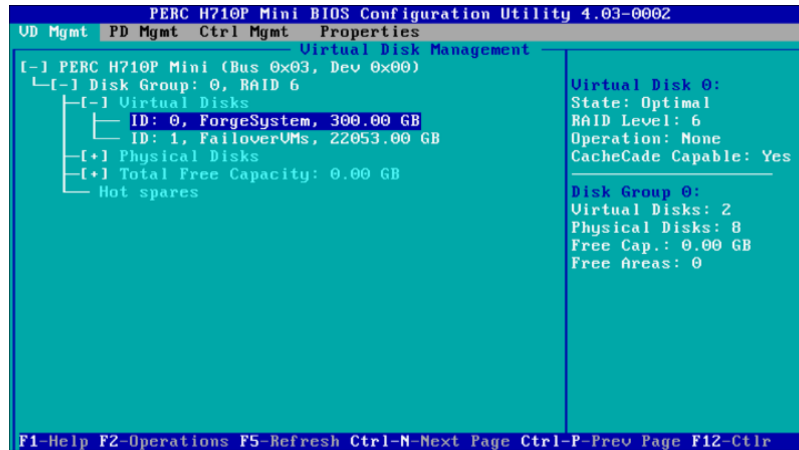
The final configuration screen for RAID 1 should look like this:



The final configuration screen for RAID 5 should look like this:



The final configuration screen for RAID 6 should look like this:



- 3 Press Esc to exit the controller configuration utility.
- 4 Press Ctrl+Alt+Del if you are prompted. The server reboots with the new settings.

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, “Licensing Microsoft Products on the Forge Management VM,” on page 19](#)
- ♦ [Section 3.3, “Licensing the ESXi 5.5 Hypervisor,” on page 21](#)
- ♦ [Section 3.4, “Running the Forge Appliance Configurator,” on page 22](#)
- ♦ [Section 3.5, “Backing Up the Factory VM,” on page 22](#)
- ♦ [Section 3.6, “Restarting the Appliance,” on page 23](#)
- ♦ [Section 3.7, “Configuring the Appliance for Immediate Use,” on page 23](#)
- ♦ [Section 3.8, “Launching the PlateSpin Forge Web Client,” on page 23](#)
- ♦ [Section 3.9, “Licensing the Forge Product,” on page 24](#)
- ♦ [Section 3.10, “Installing the Hypervisor and Forge Components,” on page 25](#)
- ♦ [Section 3.11, “Licensing Microsoft Products on the Forge Management VM,” on page 29](#)
- ♦ [Section 3.12, “Licensing the ESXi 5.5 Hypervisor,” on page 31](#)
- ♦ [Section 3.13, “Running the Forge Appliance Configurator,” on page 32](#)
- ♦ [Section 3.14, “Backing Up the Factory VM,” on page 32](#)
- ♦ [Section 3.15, “Restarting the Appliance,” on page 33](#)
- ♦ [Section 3.16, “Configuring the Appliance for Immediate Use,” on page 33](#)
- ♦ [Section 3.17, “Launching the PlateSpin Forge Web Client,” on page 34](#)
- ♦ [Section 3.18, “Licensing the Forge Product,” on page 34](#)

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 VMware ESXi 5.5.0 to the Appliance,” on page 15](#)
- ♦ [Section 3.1.2, “Reconnecting the Forge Administrative Computer,” on page 16](#)

3.1.1 Installing VMware ESXi 5.5.0 to the Appliance

PlateSpin Forge requires VMware ESXi 5.5 to control the Forge Management VM. You need to make sure that you have the *PlateSpin Forge 11.1.0 Installation* CD to proceed with the installation.

To install VMware ESXi 5.5.0 to the Forge Appliance:

- 1 Power on the appliance and press F11 at the boot prompt.
- 2 While at the boot prompt, insert the installation CD into the CD-ROM drive.

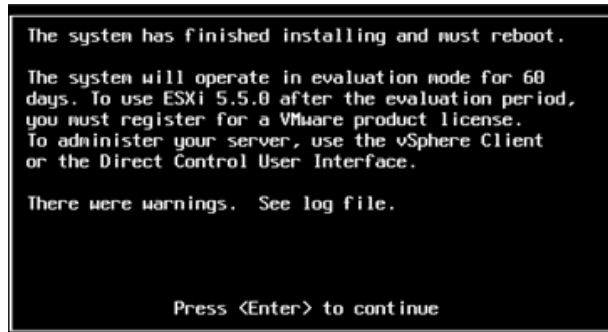
It might take some time for the *Boot Manager* utility to be displayed.

- 3 On the *Boot Manager Main Menu*, select **BIOS Boot Menu** to launch the *BIOS Boot Manager*.
- 4 In the *BIOS Boot Manager* utility, navigate to the option that lets you boot from an optical device (for example, a SATA optical drive), then press Enter.

NOTE: The name of the optical device might vary, depending on the device driver installed on the appliance.

- 5 On the Forge *ESXi build* installation menu, select **ESX Scripted Install for the Forge Appliance**, then press Enter to load the ESXi installer.

The installation progress updates on the screen and moves through several stages. When the process is completed, the following dialog box is displayed prior to the system reboot:



NOTE: If you choose not to attend the installation, the system reboots on its own. You will see the ESXi console when you return.

If you encounter problems during the installation, see [Section 4.2, “Errors Occurring During ESXi Installation,” on page 37](#) of this guide.

- 6 In the dialog box, press Enter to reboot the system (or let the system reboot itself), then continue with the instructions in [Section 3.1.2, “Reconnecting the Forge Administrative Computer,” on page 16](#).

3.1.2 Reconnecting the Forge Administrative Computer

To continue with the installation and configuration of the appliance, you need to connect directly to it through another computer, an “administrative computer.” You should have been using a Windows notebook computer (that is, a “laptop”) for this purpose in the past.

This section includes the following information:

- ♦ [“Connecting the Appliance and the Administrative Computer” on page 16](#)
- ♦ [“Deploying the OVF Template” on page 18](#)

Connecting the Appliance and the Administrative Computer

For licensing and configuration tasks in this section, use the following procedure to connect your administrative computer to the Forge hardware appliance. This requires setting up a physical connection, configuring with a static IP address in the same subnet as Forge, then re-connecting the

administrative computer to the Forge appliance. It also includes establishing a management connection, which enables the administrative computer to configure aspects of the Forge appliance software.

This section includes the following information:

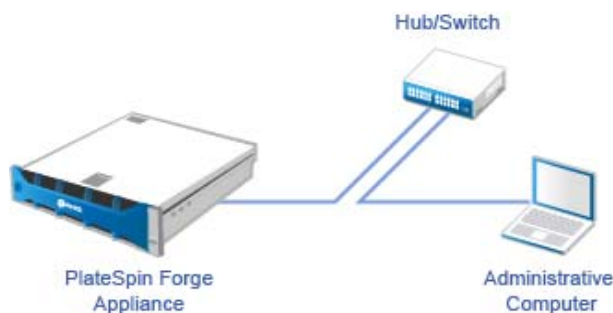
- ♦ [“Establishing a Physical Connection” on page 17](#)
- ♦ [“Establishing a Management Connection through the vSphere Client” on page 18](#)

Establishing a Physical Connection

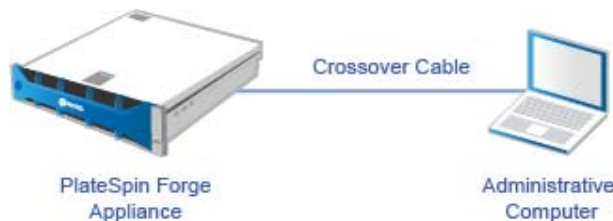
To establish a physical connection between the administrative computer and the Forge Appliance:

- 1 Use one of these methods:

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 computer directly through a crossover cable:



- 2 Turn on the power at the Forge appliance. Wait at least 10 minutes for the system to fully start before trying to connect.
- 3 Access the TCP/IP properties of the administrative computer's wired LAN adapter and assign it an IP address (192.168.1.205) and an associated subnet mask (255.255.255.0).

NOTE: Do not use the following IP addresses:

- ♦ 192.168.1.200 - used by the hypervisor
- ♦ 192.168.1.210 - used by the Forge VM (assigned by an automatic appliance configuration utility).

-
- 4 Save the settings and close the LAN Properties applet.

Establishing a Management Connection through the vSphere Client

When the administrative computer has been connected physically, you need to establish the management connection between the administrative computer and the ESXi hypervisor and the Forge Management VM. The connection is enabled through the VMware vSphere Client on the administrative computer. By using the vSphere client on the administrative computer, you can access the ESXi hypervisor and the Forge Management VM.

You already installed ESXi 5.5 on the Forge Appliance. From the administrative computer's physical connection to the Forge Appliance, you can access and download the vSphere Client.

NOTE: You will need a connection to the Internet for the download to be successful. You can either copy the link location and download the client while you are connected, or you can manually download the vSphere Client from the VMware download site (see the procedure below).

On the administrative computer, use the following steps to install the VMware Infrastructure Client program:

- 1 From a browser, enter the Forge Host address to open the *VMware ESXi 5.5 Welcome* page, then select **Download vSphere Client**.
- 2 At the download location, run the vSphere Client installation .exe.
- 3 Launch the vSphere Client login, then connect to the PlateSpin Forge using these parameters:

IP address: 192.168.1.200

User name: root

Password: Password1

The vSphere Client opens, connected to the hypervisor.

Deploying the OVF Template

Included in the *PlateSpin Forge 11.1 Appliance Upgrade/Rebuild Kit* is the `PLATESPINFORGE01.ovf` file used in the PlateSpin Forge 11.1.0.x release build. You will deploy this .ovf file during the installation process to import the Forge VM into ESXi.

Use the following steps to deploy the OVF template:

- 1 From the [PlateSpin Forge 11 Appliance Upgrade/Rebuild Kit download site](#), select and download the following files and copy them to the same location on the administrative computer.:
 - ♦ `PLATESPINFORGE01-disk1.vmdk`
 - ♦ `PLATESPINFORGE01-disk2.vmdk`
 - ♦ `PLATESPINFORGE01-file1.flp`
 - ♦ `PLATESPINFORGE01.mf`
 - ♦ `PLATESPINFORGE01.ovf`

NOTE: The OVF template uses the other files from the kit to create the Forge Management VM.

- 2 In the vSphere Client (see [“Installing VMware ESXi 5.5.0 to the Appliance” on page 15](#)), click **File > Deploy OVF Template**.
- 3 In the *Deploy OVF Template* dialog box, browse to the location where you downloaded the .ovf file, then click **Next**.

- 4 In the **Name** field of the *Name and Location* view, enter `PLATESPINFORGE01` as the name for the imported PlateSpin Forge Management VM, then click **Next**.
- 5 From the *Storage* view, select **ForgeSystem** as the destination storage location, then click **Next**.
- 6 From the *Disk Format* view, select **Thick Provision Eager Zeroed**, then click **Next**.
- 7 From the *Ready to Complete* view, select **Power on after deployment**, then click **Finish**.
The VM import process should complete after approximately 15 minutes.
- 8 In the vSphere client, locate the Forge Management VM (`PLATESPINFORGE01`), right-click the VM, then rename it to PlateSpin Forge Management VM.
- 9 In the vSphere client, click the **Console** tab, then click inside the remote console window.
- 10 At the *Product Key Settings* page, enter the product key.
- 11 On the *Administrator Account Settings* page, set the administrator password as `Password1`, click **Finish**, then log in (ensure that you press Ctrl+Alt+Insert to log in to the VM).

3.2 Licensing Microsoft Products on the Forge Management VM

NetIQ subscribes to a Microsoft Volume Licensing agreement, allowing us to pre-install Windows Server 2012 and SQL Server 2014 on the Forge Management VM without activating a license for either installation. You are not required to obtain a license from Microsoft yourself. Contact NetIQ Support for assistance with questions or issues regarding Microsoft product licensing.

WARNING: You *must* activate your Windows license key before you perform any PlateSpin Forge operations.

3.2.1 Licensing Windows Server 2012

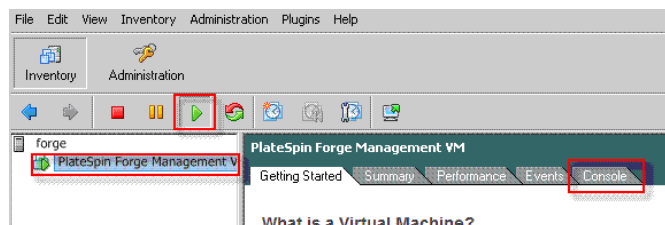
There are two methods you can use to activate the Windows Server 2012 license:

- ♦ [“Offline License Activation by Phone” on page 19](#)
- ♦ [“Multiple Activation Key License Activation” on page 20](#)

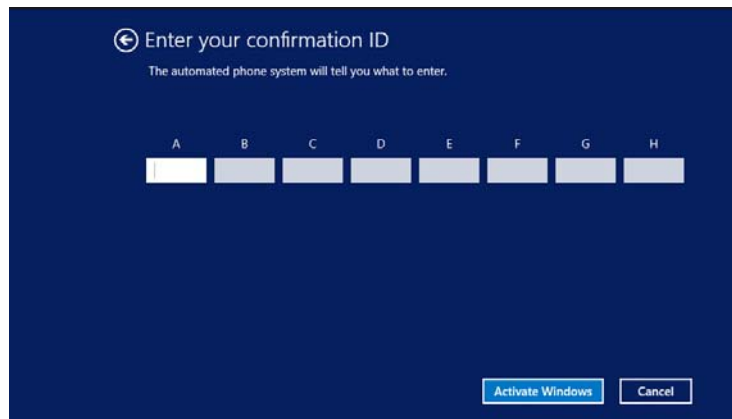
Offline License Activation by Phone

To license Windows Server 2012 offline for the Forge Management VM and log in for the first time:

- 1 In the program tree view of the vSphere client (on the administrative computer), 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 On the Windows Server 2012 desktop, right-click the Start button, then select **Command Prompt (Admin)** to open the command line interface with administrative privileges.
- 4 At the command line, enter `slui 4`.
The command launches the Software Licensing User Interface (Wizard) used for calling Microsoft for manual license activation.
- 5 In the interface, select your country or region, dial the toll-free number provided by Microsoft, write down the confirmation ID provided by the Microsoft automated phone system, then click **Enter confirmation ID**.
- 6 In the *Enter your confirmation ID* Wizard page of the interface, enter the confirmation ID you obtained from Microsoft, then click **Activate Windows**.

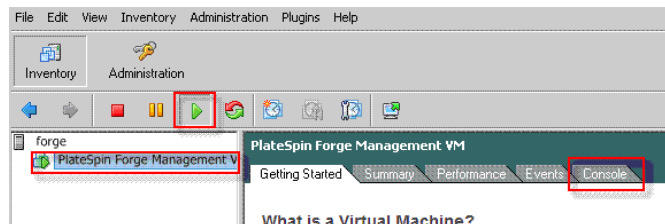


Multiple Activation Key License Activation

As an OEM provider, you might have already made Volume Licensing arrangements with Microsoft to automate and manage the activation process of Volume Licensing media. Under such an arrangement, you could have a Multiple Activation Key License (MAK) that allows the use of a command line licensing tool.

To license Windows Server 2012 for the Forge Management VM using a command line:

- 1 In the program tree view of the vSphere client (on the administrative computer), 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 On the Windows Server 2012 desktop, right-click the Start button, then select **Command Prompt (Admin)** to open the command line interface with administrative privileges.
- 4 At the command line, enter `slmgr.vbs /ipk <MultipleActivationKey>`.

The command launches a visual basic script that configures licensing on the Windows 2012 Server. After the script executes, a pop-up dialog box confirms that the product key is installed successfully.

- 5 In the dialog box, click **OK** to finish the key installation.

IMPORTANT: The Microsoft SQL Upgrade window does not display a progress bar. Because upgrading might take a few minutes, you need to wait for an indication that the upgrade completed before you close the dialog box.

3.2.2 Licensing the SQL Server 2014

To license the SQL Server 2014 for the Forge Management VM:

- 1 Open the remote console window of the running Forge Management VM, click **Start**, then select the Apps arrow located at the lower-left corner of the *Start* screen.
- 2 In the **Apps** tiles array, expand the list, then scroll right to find **SQL Server 2014 Installation Center**.

IMPORTANT: Do NOT select the *SQL Server Installation Center* app listed in the **Microsoft SQL Server 2008** category.

- 3 In this Installation Center app, click **Maintenance > Edition Upgrade**.
- 4 On the *Edition Upgrade* dialog box, select **Enter the product key**, then enter the product key you obtained from Microsoft to activate the SQL Server 2014 OEM license on the Forge Management VM.
- 5 On subsequent upgrade dialog boxes, click **Next** or **Upgrade** until the licensing process is complete, then close the licensing application.

3.3 Licensing the ESXi 5.5 Hypervisor

NetIQ subscribes to a VMware Volume Licensing agreement, allowing us to pre-install ESXi 5.5 on the Forge Management VM without activating a license for the installation. As the OEM reseller and NetIQ partner, you need to activate the vSphere OEM license as you prepare each Forge Appliance for shipping.

Obtaining the vSphere Product Key

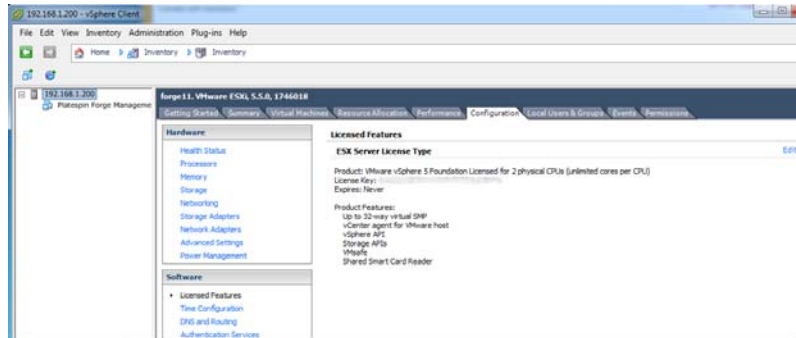
To obtain the OEM Product Keys:

- 1 Contact VMware Support, using one of regional telephone numbers listed on its [Support Contacts page](https://www.vmware.com/support/contacts/us_support.html) (https://www.vmware.com/support/contacts/us_support.html).
- 2 Advise the support representative of the VMware Customer number for NetIQ (supplied in the *Forge 11.1 Appliance Rebuild Kit*) and that you are activating a license for PlateSpin Forge. The representative will provide an ESXi 5.5 OEM product key.
- 3 Write down the ESXi 5.5 OEM product key for later use.

Activating the ESXi 5.5 License

To activate the ESXi 5.5 license for the Forge Management VM:

- 1 In the tree view of the vSphere client, select the ESXi server node, click the **Configuration** tab, then click **Licensed Features**.



- 2 In the upper right corner of the client interface, click **Edit** and select **Assign a new license key to this host**.
- 3 In the *Assign License* dialog box, enter your license key and click **OK**.
- 4 Click **OK** and exit the vSphere Client program.

3.4 Running the Forge Appliance Configurator

After its components are installed, the Forge Appliance is ready for configuration.

To configure the Forge Appliance after installation:

- 1 On the Windows desktop of the Forge Management VM, double-click the **Configure Forge Appliance** shortcut.

The tool runs for about two minutes. The configuration is complete when the system console displays a **SUCCESS** message at the command prompt.

- 2 Shut down the Forge Management VM in Windows (**Settings > Power > Shut down**).

3.5 Backing Up the Factory VM

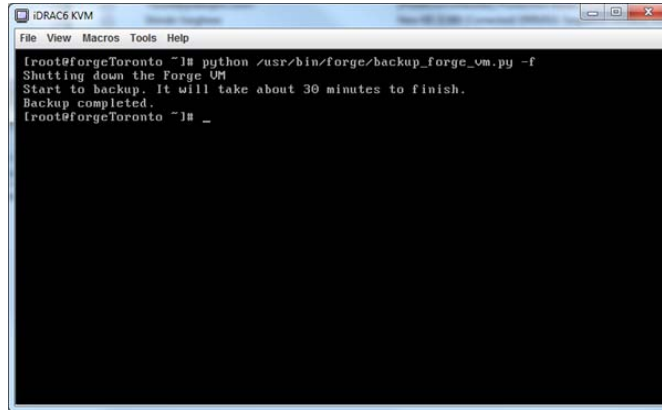
As a precaution after the installation and configuration, you need to back up the Forge Management VM (a.k.a. the “Factory VM”) on the Forge Appliance.

To back up the Factory VM:

- 1 Verify that the Forge Factory VM is shut down.
- 2 At the local console of the Forge Appliance (that is, the Dell Server iDRAC), press Alt+F1.
- 3 Log in as **root** (password: **Password1**).
- 4 At the console prompt, enter the following command:

```
python /opt/platespin/config/backup_forge_vm.py -f
```

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



```
iDRAC6 KVM
File View Macros Tools Help
[root@forgeToronto ~]# 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 ~]# _
```

3.6 Restarting the Appliance

To restart the Forge 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 11.1 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.

3.7 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 Getting Started Guide*.

NOTE: The *Getting Started Guide* is posted online at https://www.netiq.com/documentation/platespin-forge-11/forge_getstart/data/bookinfo.html.

3.8 Launching the PlateSpin Forge Web Client

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

The supported browsers are:

- ♦ *Google Chrome*, version 34.0 and later

- ♦ *Microsoft Internet Explorer*, version 11.0 and later
- ♦ *Mozilla Firefox*, version 29.0 and later

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

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

To launch the PlateSpin Forge Web Client 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.

3.9 Licensing the Forge Product

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

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

- ♦ [Section 3.9.1, “Online License Activation,” on page 24](#)
- ♦ [Section 3.9.2, “Offline License Activation,” on page 25](#)

3.9.1 Online License Activation

For online activation, the PlateSpin Forge Web Client 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 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.

3.9.2 Offline License Activation

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

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

To activate a 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.

3.10 Installing the Hypervisor and Forge Components

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

- ♦ [Section 3.10.1, "Installing VMware ESXi 5.5.0 to the Appliance," on page 25](#)
- ♦ [Section 3.10.2, "Reconnecting the Forge Administrative Computer," on page 26](#)

3.10.1 Installing VMware ESXi 5.5.0 to the Appliance

PlateSpin Forge requires VMware ESXi 5.5 to control the Forge Management VM. You need to make sure that you have the *PlateSpin Forge 11.1.0 Installation* CD to proceed with the installation.

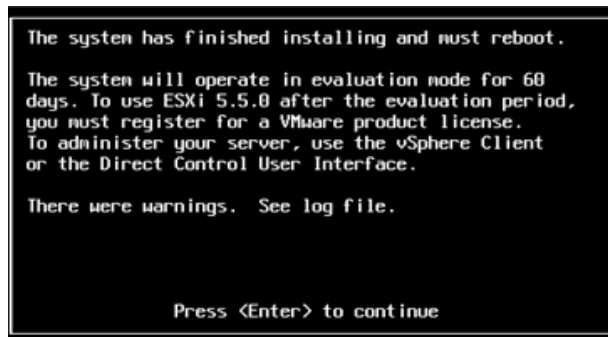
To install VMware ESXi 5.5.0 to the Forge Appliance:

- 1 Power on the appliance and press F11 at the boot prompt.
- 2 While at the boot prompt, insert the installation CD into the CD-ROM drive.
It might take some time for the *Boot Manager* utility to be displayed.
- 3 On the *Boot Manager Main Menu*, select **BIOS Boot Menu** to launch the *BIOS Boot Manager*.
- 4 In the *BIOS Boot Manager* utility, navigate to the option that lets you boot from an optical device (for example, a SATA optical drive), then press Enter.

NOTE: The name of the optical device might vary, depending on the device driver installed on the appliance.

- 5 On the Forge *ESXi build* installation menu, select **ESX Scripted Install for the Forge Appliance**, then press Enter to load the ESXi installer.

The installation progress updates on the screen and moves through several stages. When the process is completed, the following dialog box is displayed prior to the system reboot:



NOTE: If you choose not to attend the installation, the system reboots on its own. You will see the ESXi console when you return.

If you encounter problems during the installation, see [Section 4.2, “Errors Occurring During ESXi Installation,”](#) on page 37 of this guide.

- 6 In the dialog box, press Enter to reboot the system (or let the system reboot itself), then continue with the instructions in [Section 3.1.2, “Reconnecting the Forge Administrative Computer,”](#) on page 16.

3.10.2 Reconnecting the Forge Administrative Computer

To continue with the installation and configuration of the appliance, you need to connect directly to it through another computer, an “administrative computer.” You should have been using a Windows notebook computer (that is, a “laptop”) for this purpose in the past.

This section includes the following information:

- ♦ [“Connecting the Appliance and the Administrative Computer”](#) on page 27
- ♦ [“Deploying the OVF Template”](#) on page 28

Connecting the Appliance and the Administrative Computer

For licensing and configuration tasks in this section, use the following procedure to connect your administrative computer to the Forge hardware appliance. This requires setting up a physical connection, configuring with a static IP address in the same subnet as Forge, then re-connecting the administrative computer to the Forge appliance. It also includes establishing a management connection, which enables the administrative computer to configure aspects of the Forge appliance software.

This section includes the following information:

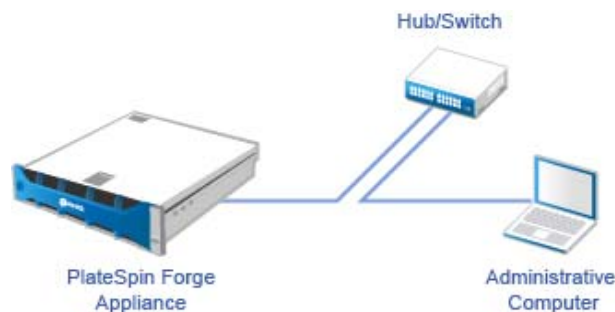
- ♦ “Establishing a Physical Connection” on page 27
- ♦ “Establishing a Management Connection through the vSphere Client” on page 28

Establishing a Physical Connection

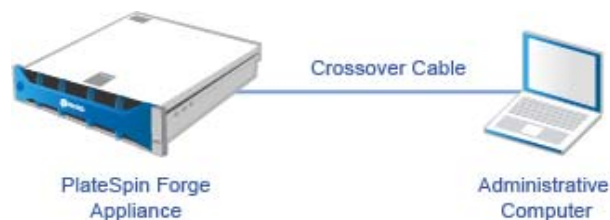
To establish a physical connection between the administrative computer and the Forge Appliance:

- 1 Use one of these methods:

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 computer directly through a crossover cable:



- 2 Turn on the power at the Forge appliance. Wait at least 10 minutes for the system to fully start before trying to connect.
- 3 Access the TCP/IP properties of the administrative computer's wired LAN adapter and assign it an IP address (192.168.1.205) and an associated subnet mask (255.255.255.0).

NOTE: Do not use the following IP addresses:

- ♦ 192.168.1.200 - used by the hypervisor
 - ♦ 192.168.1.210 - used by the Forge VM (assigned by an automatic appliance configuration utility).
-

- 4 Save the settings and close the LAN Properties applet.

Establishing a Management Connection through the vSphere Client

When the administrative computer has been connected physically, you need to establish the management connection between the administrative computer and the ESXi hypervisor and the Forge Management VM. The connection is enabled through the VMware vSphere Client on the administrative computer. By using the vSphere client on the administrative computer, you can access the ESXi hypervisor and the Forge Management VM.

You already installed ESXi 5.5 on the Forge Appliance. From the administrative computer's physical connection to the Forge Appliance, you can access and download the vSphere Client.

NOTE: You will need a connection to the Internet for the download to be successful. You can either copy the link location and download the client while you are connected, or you can manually download the vSphere Client from the VMware download site (see the procedure below).

On the administrative computer, use the following steps to install the VMware Infrastructure Client program:

- 1 From a browser, enter the Forge Host address to open the *VMware ESXi 5.5 Welcome* page, then select **Download vSphere Client**.
- 2 At the download location, run the vSphere Client installation .exe.
- 3 Launch the vSphere Client login, then connect to the PlateSpin Forge using these parameters:

IP address: 192.168.1.200

User name: root

Password: Password1

The vSphere Client opens, connected to the hypervisor.

Deploying the OVF Template

Included in the *PlateSpin Forge 11.1 Appliance Build Kit* USB Flash Drive (available from PlateSpin Support) is the The VM .ovf file used in the PlateSpin Forge 11.1.0.x release build. You will access this .ovf file during the installation process to import the Forge VM into ESXi.

Use the following steps to deploy the OVF template:

- 1 From the *PlateSpin Forge 11.1 Appliance Build Kit* media, copy the PlateSpin Forge 11.1 Appliance VM folder, with all its contents, to the administrative computer.
- 2 In the vSphere Client (see [“Installing VMware ESXi 5.5.0 to the Appliance” on page 15](#)), click **File > Deploy OVF Template**.
- 3 In the *Deploy OVF Template* dialog box, browse to the location where you downloaded the .ovf file, then click **Next**.
- 4 In the **Name** field of the *Name and Location* view, enter PLATESPINFORGE01 as the name for the imported PlateSpin Forge Management VM, then click **Next**.

- 5 From the *Storage* view, select **ForgeSystem** as the destination storage location, then click **Next**.
- 6 From the *Disk Format* view, select **Thick Provision Eager Zeroed**, then click **Next**.
- 7 From the *Ready to Complete* view, select **Power on after deployment**, then click **Finish**.
The VM import process should complete after approximately 15 minutes.
- 8 In the vSphere client, locate the Forge Management VM (PLATESPINFORGE01), right-click the VM, then rename it to **PlateSpin Forge Management VM**.
- 9 In the vSphere client, click the **Console** tab, then click inside the remote console window.
- 10 At the *Product Key Settings* page, enter the product key.
- 11 On the *Administrator Account Settings* page, set the administrator password as `Password1`, click **Finish**, then log in (ensure that you press Ctrl+Alt+Insert to log in to the VM).

3.11 Licensing Microsoft Products on the Forge Management VM

NetIQ subscribes to a Microsoft Volume Licensing agreement, allowing us to pre-install Windows Server 2012 and SQL Server 2014 on the Forge Management VM without activating a license for either installation. You are not required to obtain a license from Microsoft yourself. Contact NetIQ Support for assistance with questions or issues regarding Microsoft product licensing.

3.11.1 Licensing Windows Server 2012

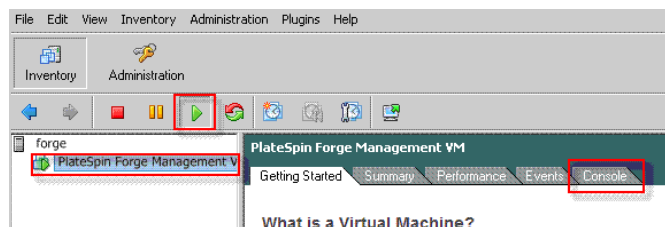
There are two methods you can use to activate the Windows Server 2012 license:

- ♦ [“Offline License Activation by Phone” on page 29](#)
- ♦ [“Multiple Activation Key License Activation” on page 30](#)

Offline License Activation by Phone

To license Windows Server 2012 offline for the Forge Management VM and log in for the first time:

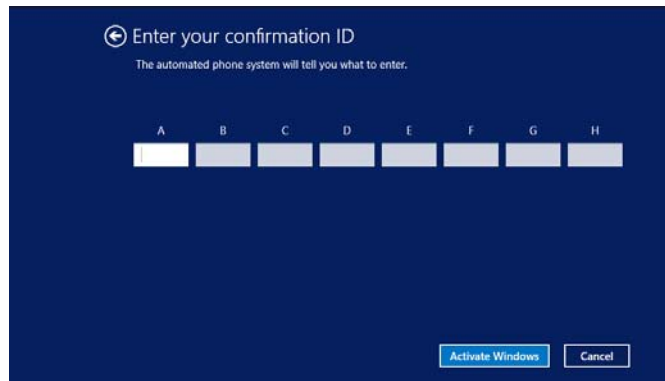
- 1 In the program tree view of the vSphere client (on the administrative computer), select the **PlateSpin Forge Management VM** item and click the green **Play** button to power it on (if it is not already on).



- 2 Click the **Console** tab, then click inside the remote console window.
- 3 On the Windows Server 2012 desktop, right-click the Start button, then select **Command Prompt (Admin)** to open the command line interface with administrative privileges.
- 4 At the command line, enter `slui 4`.

The command launches the Software Licensing User Interface (Wizard) used for calling Microsoft for manual license activation.

- 5 In the interface, select your country or region, dial the toll-free number provided by Microsoft, write down the confirmation ID provided by the Microsoft automated phone system, then click **Enter confirmation ID**.
- 6 In the *Enter your confirmation ID* Wizard page of the interface, enter the confirmation ID you obtained from Microsoft, then click **Activate Windows**.

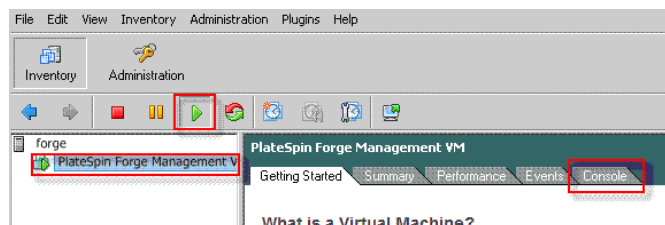


Multiple Activation Key License Activation

As an OEM provider, you might have already made Volume Licensing arrangements with Microsoft to automate and manage the activation process of Volume Licensing media. Under such an arrangement, you could have a Multiple Activation Key License (MAK) that allows the use of a command line licensing tool.

To license Windows Server 2012 for the Forge Management VM using a command line:

- 1 In the program tree view of the vSphere client (on the administrative computer), 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 On the Windows Server 2012 desktop, right-click the Start button, then select **Command Prompt (Admin)** to open the command line interface with administrative privileges.
- 4 At the command line, enter `slmgr.vbs /ipk <MultipleActivationKey>`.

The command launches a visual basic script that configures licensing on the Windows 2012 Server. After the script executes, a pop-up dialog box confirms that the product key is installed successfully.

- 5 In the dialog box, click **OK** to finish the key installation.

IMPORTANT: The Microsoft SQL Upgrade window does not display a progress bar. Because upgrading might take a few minutes, you need to wait for an indication that the upgrade completed before you close the dialog box.

3.11.2 Licensing the SQL Server 2014

To license the SQL Server 2014 for the Forge Management VM:

- 1 Open the remote console window of the running Forge Management VM, click **Start**, then select the Apps arrow located at the lower-left corner of the *Start* screen.
- 2 In the **Apps** tiles array, expand the list, then scroll right to find **SQL Server 2014 Installation Center**.

IMPORTANT: Do NOT select the *SQL Server Installation Center* app listed in the **Microsoft SQL Server 2008** category.

- 3 In this Installation Center app, click **Maintenance > Edition Upgrade**.
- 4 On the *Edition Upgrade* dialog box, select **Enter the product key**, then enter the product key you obtained from Microsoft to activate the SQL Server 2014 OEM license on the Forge Management VM.
- 5 On subsequent upgrade dialog boxes, click **Next** or **Upgrade** until the licensing process is complete, then close the licensing application.

3.12 Licensing the ESXi 5.5 Hypervisor

NetIQ subscribes to a VMware Volume Licensing agreement, allowing us to pre-install ESXi 5.5 on the Forge Management VM without activating a license for the installation. As the OEM reseller and NetIQ partner, you need to activate the vSphere OEM license as you prepare each Forge Appliance for shipping.

Obtaining the vSphere Product Key

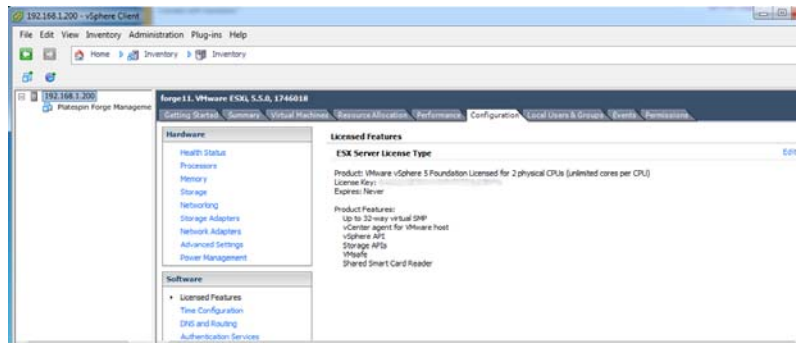
To obtain the OEM Product Keys:

- 1 Contact VMware Support, using one of regional telephone numbers listed on its [Support Contacts page](https://www.vmware.com/support/contacts/us_support.html) (https://www.vmware.com/support/contacts/us_support.html).
- 2 Advise the support representative of the VMware Customer number for NetIQ (supplied in the *Forge 11.1 Appliance Build Kit*) and that you are activating a license for PlateSpin Forge.
The representative will provide an ESXi 5.5 OEM product key.
- 3 Write down the ESXi 5.5 OEM product key for later use.

Activating the ESXi 5.5 License

To activate the ESXi 5.5 license for the Forge Management VM:

- 1 In the tree view of the VIC client, select the ESXi server node, click the **Configuration** tab, then click **Licensed Features**.



- 2 In the upper right corner of the client interface, click **Edit** and select **Assign a new license key to this host**.
- 3 In the *Assign License* dialog box, enter your license key and click **OK**.
- 4 Click **OK** and exit the vSphere Client program.

3.13 Running the Forge Appliance Configurator

After its components are installed, the Forge Appliance is ready for configuration.

To configure the Forge Appliance after installation:

- 1 On the Windows desktop of the *Forge Management* VM, double-click the **Configure Forge Appliance** shortcut.

The tool runs for about two minutes. The configuration is complete when the system console displays a **SUCCESS** message at the command prompt.

- 2 Shut down the Forge Management VM in Windows (**Settings > Power > Shut down**).

3.14 Backing Up the Factory VM

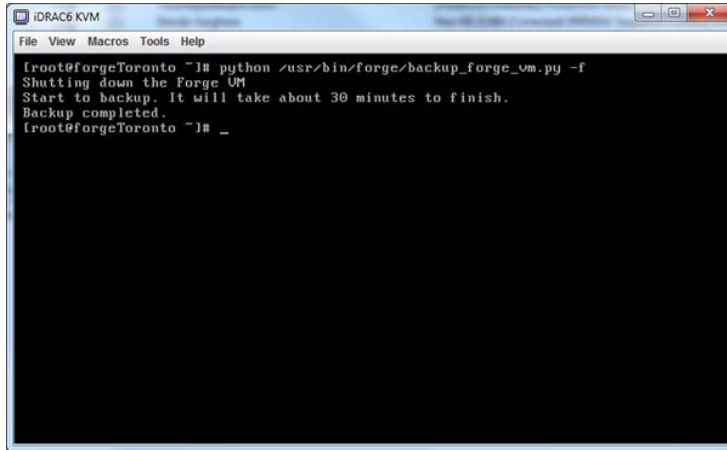
As a precaution after the installation and configuration, you need to back up the Forge Management VM (a.k.a. the “Factory VM”) on the Forge Appliance.

To back up the Factory VM:

- 1 Verify that the Forge Factory VM is shut down.
- 2 At the local console of the Forge Appliance (that is, the Dell Server iDRAC), press Alt+F1.
- 3 Log in as `root` (password: `Password1`).
- 4 At the console prompt, enter the following command:

```
python /opt/platespin/config/backup_forge_vm.py -f
```


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



```
iDRAC6 KVM
File View Macros Tools Help

[root@forgeToronto ~]# 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 ~]# _
```

3.15 Restarting the Appliance

To restart the Forge 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 11.1 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.

3.16 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 Getting Started Guide*.

NOTE: The *Getting Started Guide* is posted online at (https://www.netiq.com/documentation/platespin-forge-11/forge_getstart/data/bookinfo.html).

3.17 Launching the PlateSpin Forge Web Client

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

The supported browsers are:

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

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

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

To launch the PlateSpin Forge Web Client 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.

3.18 Licensing the Forge Product

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

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

- ♦ [Section 3.18.1, “Online License Activation,” on page 34](#)
- ♦ [Section 3.18.2, “Offline License Activation,” on page 35](#)

3.18.1 Online License Activation

For online activation, the PlateSpin Forge Web Client 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 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.

3.18.2 Offline License Activation

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

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

To activate a 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.

4 Troubleshooting

This section includes current information that can help you to troubleshoot the setup of the Forge Appliance.

- ♦ [Section 4.1, “Log File Locations,” on page 37](#)
- ♦ [Section 4.2, “Errors Occurring During ESXi Installation,” on page 37](#)

4.1 Log File Locations

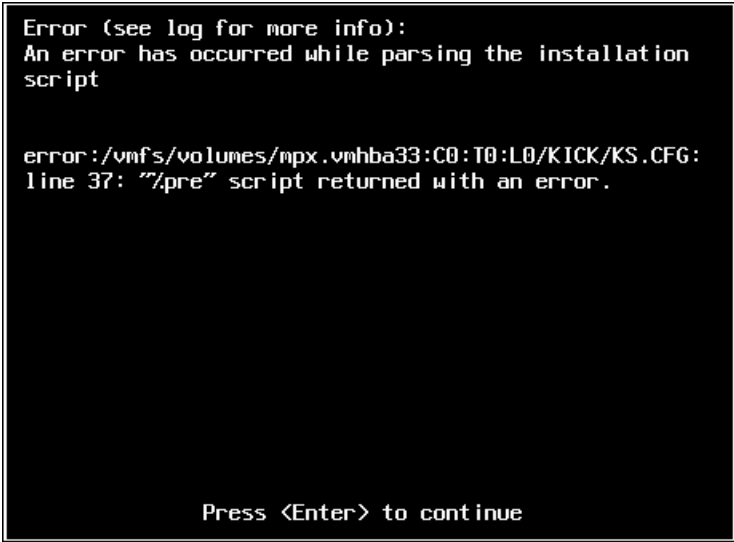
Use these installation logs to help you diagnose problems with the configuration of the Forge Appliance:

- ♦ The automated ESXi installer writes log files located at `/var/log/messages`.
- ♦ Forge installation logs are located at `/var/log/forge/`.

4.2 Errors Occurring During ESXi Installation

An error has occurred while parsing the installation script

Source: When you are performing the [VMware ESXi configuration](#), you might see the following error:

A screenshot of a terminal window with a black background and white text. The text displays an error message: "Error (see log for more info): An error has occurred while parsing the installation script". Below this, it shows the file path "error:/vmfs/volumes/mpx.vmhba33:C0:T0:L0/KICK/KS.CFG:" and the specific error "line 37: "/pre" script returned with an error." At the bottom of the terminal, it says "Press <Enter> to continue".

```
Error (see log for more info):
An error has occurred while parsing the installation
script

error:/vmfs/volumes/mpx.vmhba33:C0:T0:L0/KICK/KS.CFG:
line 37: "/pre" script returned with an error.

Press <Enter> to continue
```

Explanation: This is a symptom of the hardware model verification script that is failing.

Action: You need to gather information from the installation to understand the corrective actions you need to take.

- 1 Press Alt+F11. This command displays the ESXi alert messages related to the installation failure.
- 2 Press Alt+F1. This command displays the ESXi shell, where you can log in to locate the relevant diagnostic log file:

2a Log in with these credentials:

username: root

password: press Enter for an “empty” password (this is the beginning of the ESXi install, so no root password is set).

2b When logged in, navigate to `/var/log/forge/forge.log`.

This file can provide clues to reasons behind the failure of the install.

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 11.1 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 ESXi Host, and the Forge Appliance that is running on Windows 2003 Server.

