

PlateSpin Forge[®] 4.0

Getting Started Guide

April 11, 2014



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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.

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

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About this Book and the Library

The *Getting Started Guide* provides information on the basic steps required for setting up your PlateSpin Forge[®] appliance. The following sections are included in the guide:

- ♦ [Chapter 1, “Getting Started with Your PlateSpin Forge Appliance,” on page 9](#)
- ♦ [Appendix A, “PlateSpin Forge 4.0 Configuration Worksheet,” on page 15](#)

Intended Audience

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

Other Information in the Library

The library provides the following information resources:

User Guide

Provides conceptual and procedural information about the PlateSpin Forge product. This book defines terminology and includes implementation scenarios.

Help

Provides context-sensitive information and step-by-step guidance for common tasks.

1 Getting Started with Your PlateSpin Forge Appliance

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

- ♦ [Section 1.1, “Before You Begin,” on page 9](#)
- ♦ [Section 1.2, “Appliance Configuration Procedure,” on page 10](#)
- ♦ [Section 1.3, “Launching the PlateSpin Forge Web Client,” on page 12](#)
- ♦ [Section 1.4, “Product Licensing,” on page 12](#)
- ♦ [Section 1.5, “Post-Setup Tasks,” on page 13](#)

1.1 Before You Begin

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

1. **Obtain your license activation code:** For product licensing, you must have a license activation code, emailed to the named contact of a PlateSpin Purchase Order. To view your activation code, log in to the [Novell Customer Center Web site \(http://www.novell.com/customercenter/\)](http://www.novell.com/customercenter/), using the same email address specified in your purchase order.
2. **Fill in the configuration worksheet:** The PlateSpin Forge Resource Kit package includes a Configuration Worksheet used to document your current environment and list changes needed for configuration.

A copy of the worksheet is also available online: [Configuration Worksheet \(https://www.netiq.com/documentation/platespin_forge_4/pdfdoc/appl/appl_worksheet.pdf\)](https://www.netiq.com/documentation/platespin_forge_4/pdfdoc/appl/appl_worksheet.pdf).

3. **Set up the hardware:** Unpack the PlateSpin Forge appliance and use the Components List in the box to ensure that all components have been received. If there is anything missing, contact your PlateSpin representative. Use the contents of this booklet to help you mount and connect the hardware.

1.2 Appliance Configuration Procedure

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

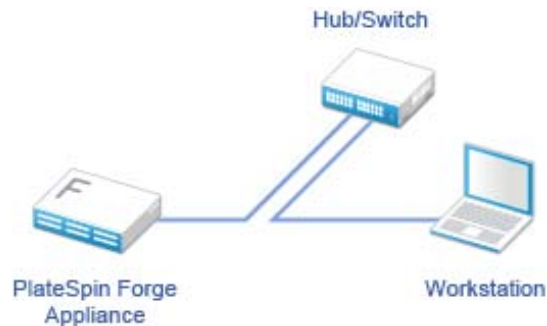
- 1 Configuring the appliance host (VMware ESX, which is the hypervisor component of the product).
- 2 Configuring the Forge Management VM (a Windows virtual machine with application logic running on the host).
- 3 Activating your product license.

Fill out the [“PlateSpin Forge 4.0 Configuration Worksheet”](#) on page 15 before starting this procedure.

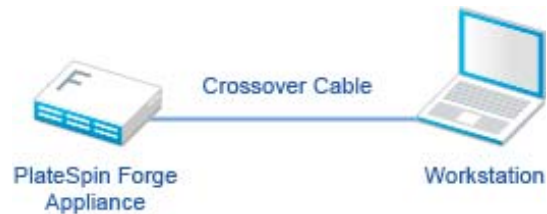
To begin the installation and configuration of the appliance, you need to connect to it directly through another computer (a.k.a. the “administrative computer”) and use the browser-based Forge Appliance Configuration Console (ACC) utility. For flexibility and mobility, consider using a notebook computer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

Use the following steps to install and configure the appliance:

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



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



- 3 Turn on the power of the PlateSpin Forge appliance. Wait at least 10 minutes for the system to fully start before trying to connect.

- 4 Assign the computer an IP address, in the 192.168.1.x range and an associated subnet mask of 255.255.255.0 (or any IP address/subnet mask combination, making sure that the computer is able to ping the appliance at its default IP address, 192.168.1.200).

NOTE: Do not use the following IP addresses:

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

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

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

-
- 6 Log in using the `root` account (password: `password`). The system redirects you to the Change Password page.
 - 7 Change the password for the `root` account as well as for the `forgeuser` account.
 - 8 Log out of the ACC.
 - 9 Log in using the `forgeuser` account using the password you set in [Step 7](#).
 - 10 Select **Configure Host**.

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

-
- 11 Specify the appropriate settings and click **Next > Apply**.

NOTE: If you are reconfiguring the appliance (and if it is not the first time you are performing this procedure), the system prompts you to verify that the new connection works. If the check fails, the configuration program reverts the Forge IP address.

Configure Host [Apply]

Network Settings:

IP address: 10 . 99 . 163 . 205

Subnet mask: 255 . 255 . 252 . 0

Gateway (opt): 10 . 99 . 160 . 10

DNS (optional): 10 . 99 . 100 . 21

Host Name: comp215

Date and Time Settings: Date: 2011-10-13

The following changed settings indicated in bold are about to be updated on your Host system:

IP address: 10.99.163.205

Subnet mask: 255.255.252.0

Gateway: 10.99.160.10

DNS: 10.99.100.21

Host name: comp215

Date: 2014-03-07

Time: 14:16

Time Zone: America/Toronto

[Continue]

☐ Verify network settings before saving

13, 2011, 14:16 Change

- 12 Click **Continue**.
- 13 When the configuration is complete, disconnect the computer and connect the appliance to the production network (where the new IP address will be valid).
- 14 From the computer, go to http://<appliance_IP>:10000
(If you are using the same computer, you need to change its IP address to one that is valid in your network).

- 15 Log in using the forgeuser account.
- 16 Click **Configure Forge VM**.
- 17 At the Configure Forge VM page, enter the appropriate settings and click **Next > Apply**.
- 18 At the summary page, click **Continue** and wait for the VM configuration to complete.
- 19 Select the **Forge dashboard** link to connect to the Forge UI at `http://<appliance_IP>/forge`.
- 20 Use the default credentials for the Forge VM (username: Administrator, password: password).

1.3 Launching the PlateSpin Forge Web Client

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

The supported browsers are:

- ♦ Microsoft Internet Explorer 7 and later
- ♦ Mozilla Firefox 3.6 and later

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

- ♦ **Internet Explorer:** Click **Tools > Internet Options > Security > Internet zone > Custom level**, then select the **Enable** option for the Active Scripting feature.
 - ♦ **Firefox:** Click **Tools > Options > Content**, then select the **Enable JavaScript** option.
-

To launch the PlateSpin Forge Web Client:

- 1 Open a Web browser and go to:
`http://<hostname | IP_address>/Forge`

NOTE: Replace `<hostname | IP_address>` with the hostname or the IP address of your Forge VM. If SSL is enabled, use https in the URL.

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

1.4 Product Licensing

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

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

- ♦ [Section 1.4.1, “Online License Activation,” on page 12](#)
- ♦ [Section 1.4.2, “Offline License Activation,” on page 13](#)

1.4.1 Online License Activation

For online activation, PlateSpin Forge must have Internet access.

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

To activate a license online, use the following steps:

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

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

1.4.2 Offline License Activation

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

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

To activate a license offline, use the following steps:

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

1.5 Post-Setup Tasks

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

- ☐ (Optional; for international versions) Set up PlateSpin Forge and your browser for use in a specific supported language. See “[Language Setup for International Versions of PlateSpin Forge](#)” in the *PlateSpin Forge 4.0 User Guide*.
- ☐ Configure appliance host networking to separate replication or failover traffic from your main production network. See “[Setting up Appliance Host Networking](#)” in the *PlateSpin Forge 4.0 User Guide*.
- ☐ (Optional) Set up appropriate role-based access settings as required by your organization. See “[Setting Up User Authorization and Authentication](#)” in your *User Guide*. In particular, ensure that you immediately change the default Administrator password (see “[Changing the PlateSpin Forge Administrator Password](#)” in the *PlateSpin Forge 4.0 User Guide*).
- ☐ Configure SMTP settings and add email notification recipients. For information, see “[Setting Up Automatic Email Notifications of Events and Reports](#)” in the *PlateSpin Forge 4.0 User Guide*.

- ❑ (Optional) Add additional data storage capacity to Forge. See “[Using External Storage Solutions with PlateSpin Forge](#)” in the *PlateSpin Forge 4.0 User Guide*.
- ❑ Familiarize yourself with the PlateSpin Forge Web Interface (see “[Up and Running](#)” in your *User Guide*), as well as the workload protection life cycle (“[Basic Workflow for Workload Protection and Recovery](#)” in the *PlateSpin Forge 4.0 User Guide*).

A PlateSpin Forge 4.0 Configuration Worksheet

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

A.1 Appliance Setup Parameters for Reference

1	Forge Superuser/root (a.k.a. Forge Virtual Host)	Login: root Password (default: password): _____
2	Appliance Host Network Information	[] Use a static IP address <ul style="list-style-type: none">♦ IP address: _____♦ Netmask: _____♦ Default Gateway (router) IP address: _____♦ DNS Server IP address: _____♦ Hostname (such as forge): _____
3	Forge Host Credentials	Host login: forgeuser Password: _____
4	VMware Infrastructure/vSphere Client	IP address / Name (from section 2): _____ User Name (from section 3): _____ Password (from section 3): _____
5	Forge Mgmt 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:

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: _____
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7	PlateSpin Forge Web Client Credentials	Username (default: administrator): Password (default: password):
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8	License Activation	<ul style="list-style-type: none"> ◆ <input type="checkbox"/> Online Activation <ul style="list-style-type: none"> ◆ Email Address (from the NetIQ Order email): _____ ◆ Activation Code (from NCC): _____ ◆ <input type="checkbox"/> Offline Activation <ul style="list-style-type: none"> ◆ Hardware ID: _____ ◆ License File location: _____
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9	Local Administrator Password	User Name (default: administrator): Current password: _____ New password: _____
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10	SMTP Settings (Optional settings for notifications)	SMTP Server Address: _____ Port (default: 25): _____ Reply Address: _____ Username: _____ Password: _____
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11	Notification Recipients – Optional	E-mail Addresses (comma-separated list):
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NOTES: