

Getting Started Guide

Novell® PlateSpin Forge

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About This Guide

This guide provides information on the basic steps required for setting up your Forge 3 appliance. A printout of this guide should be included in your Forge 3 shipment.

For a copy of this guide in one of the supported languages (Chinese, French, German, and Japanese), access the product documentation page and change the language to the required one. See [Additional Documentation](#).

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.

Feedback

We want to hear your comments and suggestions about this manual and the other documentation included with this product. Please submit your comments through the [Novell Documentation Feedback site \(http://www.novell.com/documentation/feedback.html\)](http://www.novell.com/documentation/feedback.html).

Additional Documentation

This guide has been generated from text used by the PlateSpin Forge 3 documentation. For a complete list of publications supporting this release, visit the [PlateSpin Forge Online Documentation Web Site \(http://www.novell.com/documentation/platespin_forge_3\)](http://www.novell.com/documentation/platespin_forge_3).

Additional Resources

We encourage you to use the following additional resources on the Web:

- ♦ [Novell User Forum \(http://forums.novell.com\)](http://forums.novell.com): A Web-based community with a variety of discussion topics.
- ♦ [Novell Knowledge Base \(http://www.novell.com/support\)](http://www.novell.com/support): A collection of in-depth technical articles.

Technical Support

- ♦ Telephone (North America): +1-877-528-3774 (1 87 PlateSpin)
- ♦ Telephone (global): +1-416-203-4799
- ♦ E-mail: support@platespin.com

You can also visit the [PlateSpin Technical Support Web site \(http://www.platespin.com/support\)](http://www.platespin.com/support).

Contents

About This Guide	3
1 Getting Started with Your PlateSpin Forge Appliance	7
1.1 Before You Begin	7
1.2 Appliance Setup Procedure	7
1.3 Launching the PlateSpin Forge Web Client	11
1.4 Product Licensing	12
1.4.1 Online License Activation	12
1.4.2 Offline License Activation	12
1.5 Post-Setup Tasks	13

Getting Started with Your PlateSpin Forge Appliance

1

PlateSpin Forge is a consolidated recovery hardware appliance that protects physical and virtual workloads by using embedded virtualization technology. If there is a production server outage or disaster, workloads can be rapidly powered on within the PlateSpin Forge recovery environment and continue to run as normal until the production environment is restored.

- ♦ [Section 1.1, “Before You Begin,” on page 7](#)
- ♦ [Section 1.2, “Appliance Setup Procedure,” on page 7](#)
- ♦ [Section 1.3, “Launching the PlateSpin Forge Web Client,” on page 11](#)
- ♦ [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, e-mailed 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 e-mail address specified in your Purchase Order.
2. **Fill in the configuration worksheet:** Record all pertinent information on your printed Configuration Worksheet for future reference. This reference might save you time during the installation and configuration of the appliance. You can also download a copy of the [Configuration Worksheet in PDF \(http://www.novell.com/documentation/platespin_forge_3/pdfdoc/appl/appl_worksheet.pdf\)](http://www.novell.com/documentation/platespin_forge_3/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 hardware manufacturer’s documentation shipped with the unit to mount and connect the hardware, including the monitor and keyboard.

After everything is connected and powered on, proceed to [“Appliance Setup Procedure” on page 7](#).

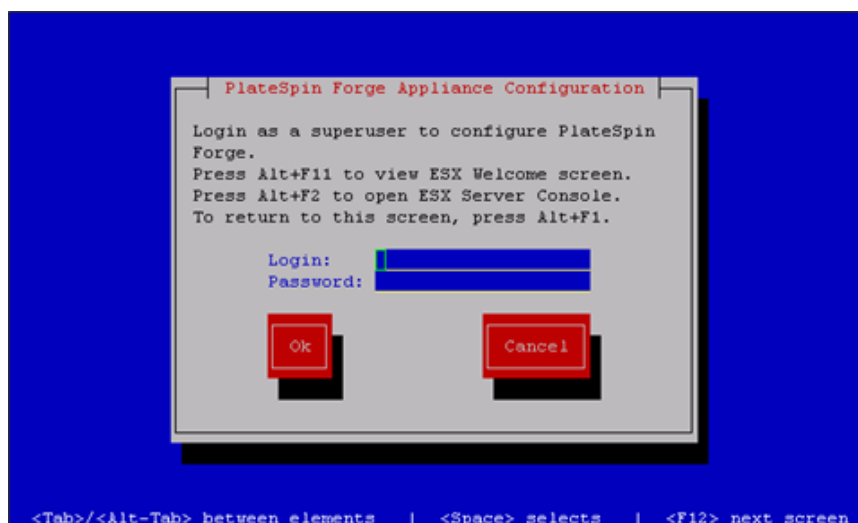
1.2 Appliance Setup Procedure

The initial setup and configuration of the PlateSpin Forge appliance is a one-time procedure. Record all pertinent information on the printed Configuration Worksheet in case you need to contact PlateSpin Technical Support with any setup issues.

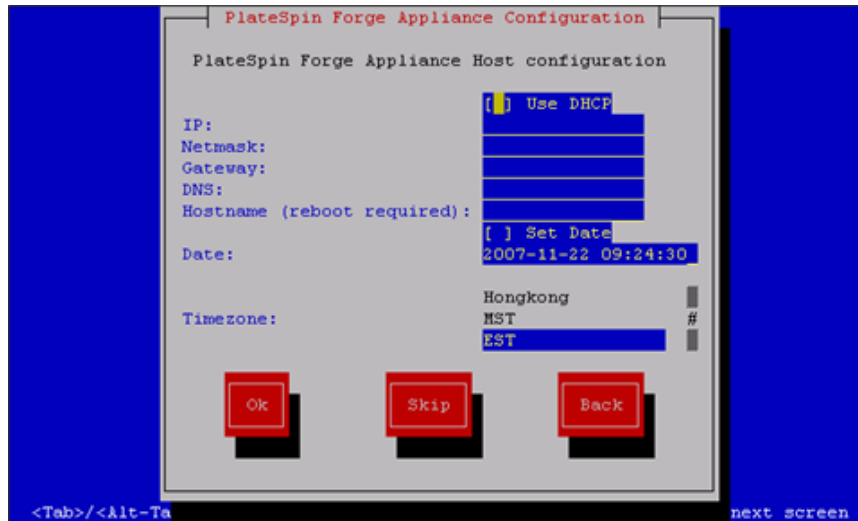
IMPORTANT: Unsupported modifications of the PlateSpin Forge or Management VM, including running other virtual machines on PlateSpin Forge, can impact its performance and might violate the End User License Agreement, voiding your warranty.

To fully configure PlateSpin Forge, you need to configure the hardware and the Management VM (the software).

- 1 Upon initial power-on, ensure that the PlateSpin Forge Configuration dialog box is displayed.



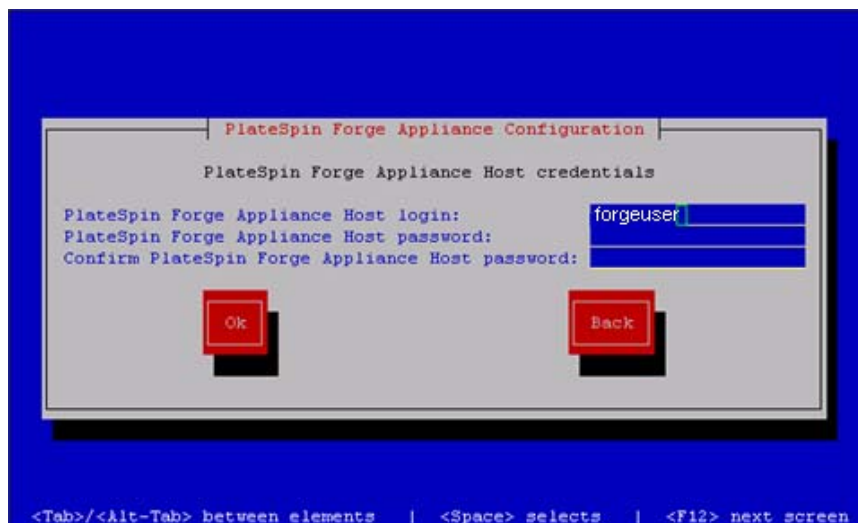
- 2 Type `root` in the *Login* field and password in the *Password* field. Select *OK*.
The *change default password* dialog box is displayed. You must change the default password before proceeding.
- 3 Type a new password in the *New password* field and again in the *Confirm Password* field. Select *OK*.
The system confirms the password change.
- 4 Select *OK*.
You are logged out so that you can log back in with your new password.
- 5 Log back in.
The VMware ESX EULA dialog box is displayed. You must accept the end user license before continuing.
- 6 Select *I accept the terms and conditions*, then select *OK*.
See [the VMware Web Site \(http://www.vmware.com\)](http://www.vmware.com) for the latest end user license agreement.
The PlateSpin Forge EULA dialog box is displayed.
- 7 Select *I accept the terms and conditions*, then select *OK*.
The PlateSpin Forge Host Configuration dialog box is displayed.
- 8 Specify the *IP* address, *Netmask*, and *Gateway* IP address you want to assign to the Appliance Host. Optionally, you can also enter a *Hostname*, but you will need to reboot the appliance.



You can also use DHCP, but assigning a static IP address is recommended. It is also highly recommended to assign hostnames to the appliances in multiple-appliance environments to avoid hostname conflicts.

- 9 Select *Set Date*, specify a date and time, select a *Timezone*, then select *OK*.

The PlateSpin Forge Host Credentials dialog box is displayed. This is where you enter the credentials you want to use to access the ESX server, which is the hypervisor layer of the appliance.



- 10 Specify a login name in the *PlateSpin Forge Appliance Host login* field, type a password, confirm by retyping the password, then select *OK*. This creates a new ESX user that is a member of the *root* group. Unlike the *root* user, the new user has SSH permissions on ESX.

The Management VM network settings dialog box is displayed.



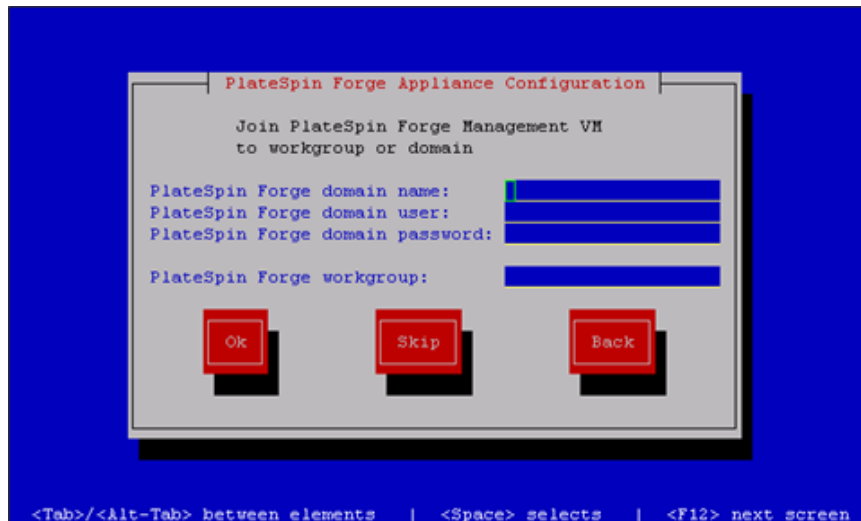
- 11 Deselect *Use DHCP* and provide the Management VM *IP* address, *Netmask*, *Gateway* address, and (optionally) a *Hostname*. The IP address entered here is used to access the PlateSpin Forge Web Client.

You can also use DHCP, but assigning a static IP address is recommended.

- 12 (Optional) Type the name of a DNS server in the *DNS* field and provide a *DNS suffix*.
- 13 Click *OK*.

The Appliance Configuration dialog box prompts whether or not to join a workgroup or domain.

- 14 Select *Yes* to open the Join PlateSpin Forge Management VM to Workgroup or Domain dialog box:



Joining a domain allows you to give selected domain users permissions for the application.

15 Do one of the following:

- ♦ Type a domain name, user, and password, or type a workgroup. If the domain fields are populated, the *Workgroup* field is ignored. Select *OK*.
- ♦ Leave the fields empty and click *Skip* to proceed to the next step and use WORKGROUP as the default workgroup name.

A Configuration Review dialog box is displayed with a summary of the parameters you have selected. Use the information to verify your settings.

If necessary, select *Cancel* to display an error message or to exit the configuration interface. Select *Back* to edit previous settings.

16 Select *OK*.

A configuration progress dialog box is displayed. Configuration can take several minutes. A final dialog box is displayed confirming the configuration's success or failure. If the process is successful, the dialog box presents a URL you can use to access the PlateSpin Forge Web Client. Record this URL for future use.



17 Select *OK*.

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, 8
- ♦ Mozilla Firefox 3.6

To launch the PlateSpin Forge Web Client:

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 Management 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.

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 e-mailed 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 12](#)

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.

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



- 2 Select *Online Activation*, specify the e-mail 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.

1.4.2 Offline License Activation

For offline activation, you obtain a license key over the Internet by using a machine 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 e-mail address registered with PlateSpin) as input for your Novell account username.

- 1 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 Web Site](http://www.platespin.com/productactivation/ActivateOrder.aspx) (<http://www.platespin.com/productactivation/ActivateOrder.aspx>). This also requires a user name, password, the e-mail 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

For information on each task, you can access the indicated topic either in the browser-based online help system that you launch from within the PlateSpin Forge Web Client, or at the [PlateSpin Forge 3 Documentation Web site](http://www.novell.com/documentation/platespin_forge_3) (http://www.novell.com/documentation/platespin_forge_3).

1. (International versions) Set up PlateSpin Forge and your browser for use in a specific supported language. See *Application Configuration > Default Options > Language Setup for International Versions of PlateSpin Forge* (http://www.novell.com/documentation/platespin_forge_3/config/data/bq6bo10.html).
2. Configure appliance host networking to separate replication or failover traffic from your main production network. See *Appliance Setup and Maintenance > Setting up Appliance Host Networking* (http://www.novell.com/documentation/platespin_forge_3/appl/data/bo8b4jk.html).
3. Set up the proper role-based access to Forge. See *Application Configuration > Setting Up User Authorization and Authentication* (http://www.novell.com/documentation/platespin_forge_3/appl/data/bo8b4jk.html). In particular, make sure that you immediately change the default Administrator password.
4. Configure SMTP settings and add e-mail notification recipients. See *Application Configuration > Setting Up E-Mail Notifications* (http://www.novell.com/documentation/platespin_forge_3/config/data/bo8az3a.html).
5. Add additional data storage capacity to Forge. See *Appliance Setup and Maintenance > Using External Storage Solutions with PlateSpin Forge* (http://www.novell.com/documentation/platespin_forge_3/appl/data/bo8awaz.html).
6. Familiarize yourself with workload protection tasks and the workflow. See the *PlateSpin Forge User Guide > Basic Workflow for Workload Protection and Recovery* (http://www.novell.com/documentation/platespin_forge_3/user/data/bo8di0v.html).

