Vizioncore™ vOptimizer Pro

Version 2.1
Installation and Setup Guide

Installation and Setup Guide
March 2009
Version 2.1

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Introduction to this Guide

Vizioncore™ vOptimizer Pro is the recognized industry standard VM optimization solution. vOptimizer Pro is an advanced optimization technology that reduces a virtual machine's virtual hard drive to the smallest size possible & also optimizes Window's guest operating systems for speed & performance.

This chapter contains the following sections:

About vOptimizer Pro

vOptimizer Pro is a Windows VM optimization and storage reclamation solution that helps to manage VM sprawl and growing enterprise storage costs - it also maximizes the guest OS performance of every running VM.

The two main functions of vOptimizer Pro are:

- To enable the reclamation of space taken on ESX datastores by automating the periodic resizing of NTFS partitions for Windows based VMs.

- To improve VM performance and reduce the footprint of Windows by enabling the periodic deletion of selected files and services

Perhaps the most impactful of the 2 prime functions is storage reclamation. vOptimizer Pro performs a partition adjustment of any ESX based VM, via an automated process of mounting an offline VM, inspection of the VM's file system and guest OS, followed by a (NTFS) resizing of the VM's partition.

About this Guide

This section outlines an approach for using this guide, reviews the text conventions that are used, and summarizes the rest of the documentation set.

How to Use this Guide

This guide walks you through a vOptimizer Pro installation, including information on system requirements and licensing.

This guide is organized as follows:

Chapter 1: System Requirements - This chapter outlines the hardware and software requirements for installing vOptimizer Pro as well as detailing which platforms and guest operating systems are supported.

Chapter 2: Installing vOptimizer Pro - This chapter describes the process for installing vOptimizer Pro.

Chapter 3: Running vOptimizer Pro - This chapter outlines the process of starting vOptimizer Pro for the first time, licensing the application, and configuring connections with the Virtual Infrastructure.

Text Conventions

The following table summarizes how text styles are used in this guide:

Convention	Description
`Code`	Monospace text represents code, code objects, and command-line input. This includes: • Java language source code and examples of file contents • Classes, objects, methods, properties, constants, and events • HTML documents, tags, and attributes
Variables	Monospace-plus-italic text represents variable code or command-line objects that are replaced by an actual value or parameter.
Interface	Bold text is used for interface options that you select (such as menu items) as well as keyboard commands.
Files, components, and documents	Italic text is used to highlight the following items: • Pathnames, file names, and programs • Figure captions • The names of other documents referenced in this guide

vOptimizer Pro Documentation Suite

The documentation suite is made up of the core documentation set plus documents set for advanced configurations. Documentation is provided in a combination of online help and PDF.

- **Online Help:** You can open online help by selecting Tutorial in the Help menu.

- **PDF:** The *What's New Guide*, *Installation and Setup Guide,* and *User Guide*, are provided as PDF files. The PDF guides are included in the zip file downloaded from Vizioncore. Adobe® Reader® is required.

Core Documentation Set

The core documentation set consists of the following:

- *Release Notes* (PDF)
- *What's New Guide* (PDF)
- *Installation and Setup Guide* set (PDF)
- *vOptimizer Pro User Guide* (PDF and online help)

About Vizioncore Inc.

Vizioncore was formed in July 2002 as a consulting and software-development company with the mission to create easy-to-use software solutions that performed reliable and repeatable automation of datacenter functions specifically for the Citrix platform. A main corporate goal was to enable business partners to offer solutions that targeted real-world IT issues and provided the best possible installation and automation for their clients' systems.

Vizioncore's solutions have proved successful in organizations from small to mid-sized businesses to large enterprises, in a wide variety of vertical industries, including Financial Services, Government, Healthcare, Manufacturing, and High Tech. Vizioncore, Inc. can be found in offices around the globe and at www.vizioncore.com.

Feedback on the Documentation

We are interested in receiving feedback from you about our documentation. For example, did you notice any errors in the documentation? Were any features undocumented? Do you have any suggestions on how we can improve the documentation? All comments are welcome. Please submit your feedback to the following email address:

info@vizioncore.com

Please do not submit Technical Support related issues to this email address.

Contacting Dell

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	E-Mail Address	la-techsupport@dell.com
	Technical Support., Customer Service, Sales	1-800-805-5924
Aomen	Technical Support	
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	Optiplex™, Dell Lattitude™, and Dell	
	Precision™Servers and Storage	0800-105
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	Technical Support	toll-free: 0-800-444-0733
	Technical Support Services	toll-free: 0-800-444-0724
	Sales	0-800-444-3355
Aruba	Web Address	www.Dell.com/aw
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	Technical Support., Customer Service, Sales	toll-free: 800-1578
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	Technical Support., Customer Service, Sales	13DELL-133355

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	Customer Service	toll-free: 1800 881 306 (option 6)
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	Sales	50-81-8800 or 01-800-888-3355
	Customer Service	001-877-384-8979 or 001-877-269-3383
	Main	50-81-8800 or 01-800-888-3355
Montserrat	E-mail Address	la-techsupport@dell.com
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	Relational Sales	020 674 50 00
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	Switchboard	020 674 50 00
	Switchboard Fax	020 674 47 50
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	Sales	57 95 999
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	Customer Service	toll-free: 1 800 394 7430 (option 6)
	Transaction Sales	toll-free: 1 800 394 7412
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	Switchboard (Sales)	02 5441 8328 02 5441 7585
South Africa (Johannesburg) International Access Code: 09/091 Country Code: 27 City Code: 11	Web Address	support.euro.dell.com
	E-mail Address	dell_za_suppor@dell.com
	Gold Queue	011 709 7713
	Technical Support	011 709 7710
	Customer Service	011 709 7707
	Sales	011 709 7700

Spain (Madrid)	Web Address	Support.euro.com
International Access Code: 00 Country Code: 34 City Code: 91	Home and Small Business	
	Technical Support	902 100 130
	Customer Service	902 118 540
	Sales	902 118 541
	Switchboard	902 118 541
	Fax	902 118 539
	Corporate	
	Technical Support	902 100 130
	Customer Service	902 115 236
	Switchboard	91 722 92 00
	Fax	91 722 95 83
Sweden (Upplands Vasby)	Web Address	support.euro.dell.com
	Technical Support	08 590 05 199
International Access Code: 00 Country Code: 46 City Code: 8	Relational Customer Service	08 590 05 642
	Home/Small Business Customer Service	08 587 70 527
	Employee Purchase Program (EPP) Support	020 140 14 44
	Technical Support Fax	08 590 05 594
Switzerland (Geneva)	Web Address	Support.euro.dell.com
	E-mail Address	Tech_support_central_Europe@dell.com
International Access Code: 00 Country Code: 41 City Code: 22	Technical Support – Home and Small Business	0844 811 411
	Technical Support – Corporate	0844 822 844
	Customer Service – Home and Small Business	0848 802 202
	Customer Service – Corporate	0848 821 721
	Fax	022 799 01 90
	Switchboard	022 799 01 01
Taiwan	Web Address	support.ap.dell.com
	E-mail Address	support.dell.com.cn/email
International Access Code: 002 Country Code: 886	Technical Support - OptiPlex, Latitude, Inspiron, Dimension, and Electronics and Accessories	toll-free: 0080 186 1011
	Technical Support - Servers and Storage	toll-free: 0080 160 1256
	Customer Service	toll-free: 0080 160 1250 (option 5)
	Transaction Sales	toll-free: 0080 165 1228
	Corporate Sales	toll-free: 0080 165 1227
Thailand	Web Address	Support.ap.dell.com
International Access Code: 001 Country Code: 66	Technical Support (OptiPlex, Latitude, and Dell Precision)	toll-free: 1800 0060 07
	Technical Support (PowerApp, PowerEdge, PowerConnect, and PowerVault)	toll-free: 1800 0600 09
	Customer Service	toll-free: 1800 006 007 (option 7)
	Corporate Sales	toll-free: 1800 006 009
	Transaction Sales	toll-free: 1800 006 006
Trinidad/Tobago	Web Address	www.dell.com/tt
	E-mail Address	la-techsupport@dell.com
	Technical Support, Customer Service, Sales	toll-free: 1-888-799-5908
Turks and Caicos Islands	Web Address	www.dell.com/tc
	E-mail Address	la-techsupport@dell.com
	Technical Support, Customer Service, Sales	toll-free: 1-877-441-4735

U.K.(Bracknell)	Web Address	upport.euro.dell.com
	E-mail Address	dell_direct_support@dell.com
International Access Code: 00 Country Code: 44 City Code: 1344	Customer Service Website	support.euro.dell.com/uk/en/ECare/ form/home.asp
	Sales	
	Home and Small Business Sales	0870 907 4000
	Corporate/Public Sector Sales	01344 860 456
	Customer Service	
	Home and Small Business	0870 906 0010
	Corporate	01344 373 185
	Preferred Accounts (500-5000 employees)	0870 906 0010
	Global Accounts	01344 373 186
	Central Government	01344 373 196
	Local Government & Education	01344 373 199
	Health	01344 373 194
	Technical Support	
	Corporate/Preferred Accounts/PCA (1000+ employees)	0870 908 0500
	Other Dell Products	0870 353 0800
	General	
	Home and Small Business Fax	0870 907 4006
Uruguay	Web Address	www.dell.com/uy
	E-mail Address	la-techsupport@dell.com
	Technical Support, Customer Service, Sales	toll-free: 000-413-598-2521
U.S.A. (Austin, Texas)	Automated Order-Status Service	toll-free: 1-800-433-9014
	AutoTech (portable and desktop computers)	toll-free: 1-800-247-9362
International Access Code: 011 Country Code: 1	Hardware and Warranty Support (Dell TV, Printers, and Projectors) for Relationship customers	toll-free: 1-877-459-7298
	Consumer (Home and Home Office) Support for Dell products	toll-free: 1-800-624-9896
	Customer Service	toll-free: 1-800-624-9897
	Employee Purchase Program (EPP) Customers	toll-free: 1-800-695-8133
	Financial Services Web Address	www.dellfinancialservices.com
	Financial Services (lease/loans)	toll-free: 1-877-577-3355
	Financial Services (Dell Preferred Accounts [DPA])	toll-free: 1-800-283-2210
	Business	
	Customer Service	toll-free: 1-800-624-9897
	Employee Purchase Program (EPP)	toll-free: 1-800-695-8133
	Customer s Support for printers, projectors, PDAs, and MP3 players	toll-free: 1-877-459-7298
	Public (government, education, and healthcare)	
	Customer Service and Support	toll-free: 1-800-456-3355
	Employee Purchase Program (EPP) Customers	toll-free: 1-800-695-8133
	Dell Sales	toll-free: 1-800-289-3355 or toll-free: 1-800-879-3355
	Dell Outlet Store (Dell refurbished computers)	toll-free: 1-888-798-7561
	Software and Peripherals Sales	toll-free: 1-800-671-3355
	Spare Parts Sales	toll-free: 1-800-357-3355
	Extended Service and Warranty Sales	toll-free: 1-800-247-4618
	Fax	toll-free: 1-800-727-8320
	Dell Services for the Deaf, Hard-of-Hearing, or Speech-Impaired	toll-free: 1-877-DELLTTY (1-877-335-5889)

U.S. Virgin Islands	Web Address	www.dell.com/vi
	E-mail Address	la-techsupport@dell.com
	Technical Support, Customer Service, Sales	toll-free: 1-877-702-4360
Venezuela	Web Address	www.dell.com/ve
	E-mail Address	la-techsupport@dell.com
	Technical Support, Customer Service, Sales	0800-100-4752

System Requirements

This chapter outlines the hardware and software requirements for installing vOptimizer Pro and the supported platforms for optimization.

This chapter contains the following sections:

Installation Requirements

The resource requirements to run vOptimizer Pro can vary widely based on a number of factors, including:

- The number and size of VMs being optimized
- The number of concurrent optimization jobs

You should not consider doing a large scale production implementation without conducting a proper scoping and sizing exercise. At a minimum, you will be required to provide hardware matching the specifications below.

Resource Requirements

vOptimizer Pro is a standalone application that requires no external database or infrastructure components. The resource requirements for the vOptimizer Pro server are:

- CPU: 1 GHz 32-bit (x86) processor.
- RAM: 1 GB of system memory
- Storage: At least 4 GB free hard disk space
- Graphics: At least 1024x768 video resolution (1280x1024 or greater recommended)

Software Requirements

vOptimizer Pro requires a physical or virtual machine running one of the following operating systems. All service pack levels are supported.

- Windows XP Professional (x86, x64)
- Windows Vista Business or Ultimate (x86, x64)
- Windows Server 2003 (x86, x64)
- Windows Small Business Server (x86, x64)
- Windows Server 2008 (x86, x64)

Note   vOptimizer Pro requires the Microsoft .NET Framework version 2.0. You can confirm that you have .NET Framework v2.0 installed by accessing **Start>Add or Remove Programs**. You can install .NET Framework v2.0 through **Internet Explorer>Tools>Windows Update**. Alternately, you can download it from www.microsoft.com.

Supported Platforms

vOptimizer Pro supports the following versions of VMware ESX Server:

- VMware ESX Server 3.5 Update 3
- VMware ESX Server 3.5 Update 2
- VMware ESX Server 3.5 Update 1
- VMware ESX Server 3.5
- VMware ESX Server 3.0.3
- VMware ESX Server 3.0.2 Update 1
- VMware ESX Server 3.0.2
- VMware ESX Server 3.0.1

The following versions of ESX Server are not supported:

- VMware ESXi Server (any version)
- VMware ESX Server 2.5.4
- VMware ESX Server 2.5.3
- VMware ESX Server 2.5.2

Supported Guest Operating Systems

vOptimizer Pro performs two different types of functions - *optimizations* and *storage reclamations.* The supported Guest Operating systems differ for each function.

Optimization

vOptimizer Pro supports optimization functions on the following guest operating systems. All service packs are supported.

- Windows 2000 Server (x86)

- Windows 2000 Professional (x86)

- Windows Server 2003 (x86, x64)

- Windows XP Professional (x86, x64)

Storage Reclamation

- Windows 2000 Server (x86)

- Windows 2000 Professional (x86)

- Windows Server 2003 (x86, x64)

- Windows XP Professional (x86, x64)

Guest Configuration Requirements

vOptimizer Pro communicates with target VMs using the VM's IP address. In addition, vOptimizer Pro uses VMware Tools to perform certain functions of the optimization and resize process. For this reason, VMware Tools must be installed and running on every target VM.

Caution   vOptimizer Pro will not be able to optimize or resize VMs without these configurations being present.

VMware Tools

VMware Tools is a suite of utilities that enhances the performance of the virtual machine's guest operating system and improves management of the virtual machine. VMware Tools must be installed and running on target VMs. will not be able to optimize or resize a VM if VMware Tools is not running.

For more information on installing VMware Tools, see page 155 of VMware's *Basic System Administration Guide*.

Connected NIC

In order for a virtual machine to connect to a physical network, the's virtual network card (vNIC) seen by the Guest OS must be connected and mapped to a vSwitch connected to at least one physical network adapter.

For more information on network configuration, see "Networking" and "Advanced Networking" in the VMware ESX Server Configuration Guide.

Tip VMware documentation is available via the VMware Online Library: *http://pubs.vmware.com/ vi35/wwhelp/wwhimpl/js/html/wwhelp.htm*

VM Names

Avoid using special characters in VM names. Special characters, such as those listed below can cause problems during VMDK resizing.

single quote	`	equals	=
double quote	"	carrot	^
dash	–	percent sign	%
exclamation point	!	question mark	?
at sign	@	ampersand	&
number sign	#	asterisk	*
dollar sign	$	parentheses	( )
plus sign	+	bracket	[ ]
braces	{ }	pipe	|
semicolon	;	underscore	_
colon	:	period	.

Configurations Not Supported

There are several common configurations for which vOptimizer Pro's resizing operations are not supported. These configurations are listed below:

- VMs configured with Dynamic Discs

- VMs that contain VMDKs with open snaphots

- VMs that contain VMDKs stored on either virtual or physical RDMs.

- VMs that contain VMDKs that were thinly provisioned. For more information, see **vOptimizer Pro and Thin Provisioning** in the *vOptimizer Pro 2.1 Release Notes*.

Caution   This list should not be considered as exhaustive. The best course of action is always to carefully evaluate vOptimizer Pro prior to purchasing.

Installing vOptimizer Pro

This chapter guides you through the process of installing vOptimizer Pro using the vOptimizer Pro installer.

This chapter contains the following sections:

Preparing to Install

You will need the following to install vOptimizer Pro:

- A physical or virtual machine to host the vOptimizer Pro installation.
- Administrator access to the machine on which vOptimizer Pro will be installed.
- Administrator access to the target VMs.

Installing a new version of vOptimizer Pro

The installation of vOptimizer Pro is a simple process with few options for variance. The installation sequence is the same for all platforms. The procedure below assumes you've downloaded the vOptimizer Pro executable from the Vizioncore website.

To install vOptimizer Pro:

Step 1: File Extraction

The vOptimizer Pro installer prompts you to extract the *setup.exe* and *vOptimizer.msi*.
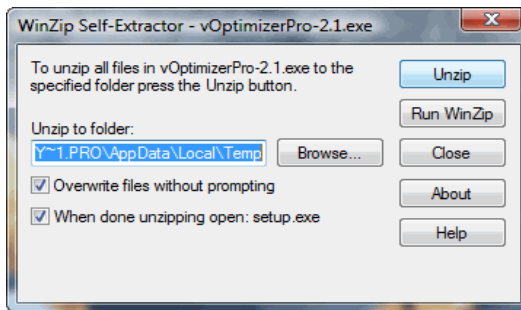
1 Click **Unzip** to accept the default directory.

or

Click **Browse** and select a different location. Click **Unzip**

After the extraction completes, the Welcome to the vOptimizer Pro Setup Wizard dialog appears.

Step 2: Welcome Screen

The Welcome to the vOptimizer Pro Setup Wizard dialog marks the start of the installation process.
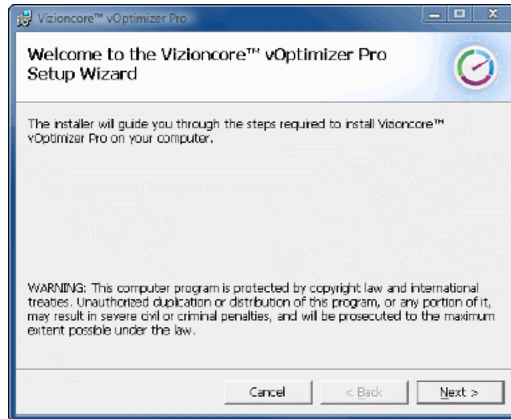
1 Click **Next**

Step 3: License Agreement

1 Read through the License Agreement statement, and accept or decline the terms of the license agreement.
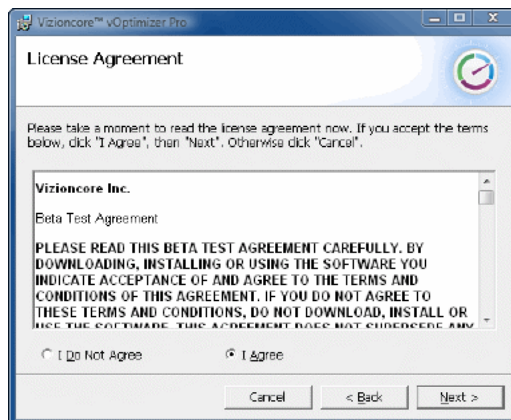
2 If you selected **I Agree**, click **Next**

Step 4: Installation Folder

1 Choose the location where you want to install vOptimizer Pro. You can accept the default location *C:\Program Files\Vizioncore\vOptimizer Pro* or click **Browse** to navigate to another location.
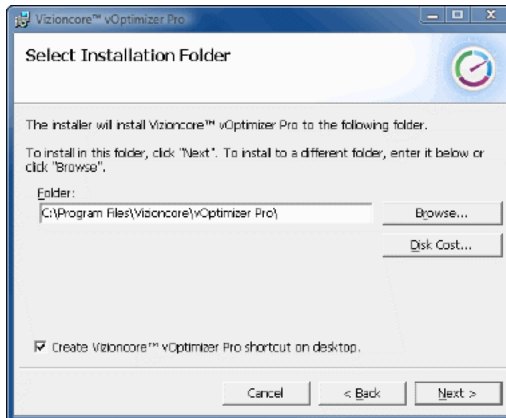
2 If desired, click **Disk Cost** to see the amount of free space available on the local machine, and how much space is required by the vOptimizer Pro installation.
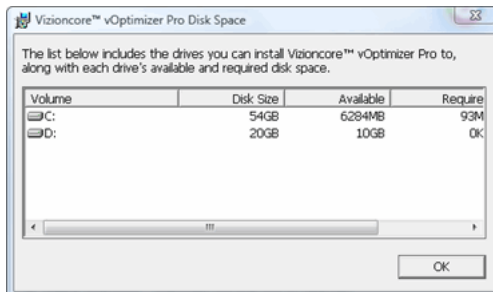
3 Click **Next**

Step 5: Confirm Installation

1 Click Next to install vOptimizer Pro.
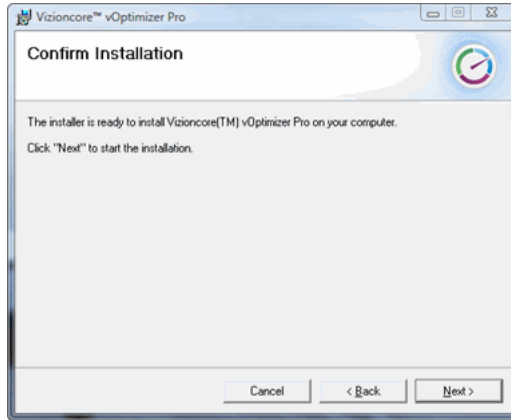
The vOptimizer Pro installation will begin. This process may take several minutes.

Step 6: Complete

The installation is complete. Click **Close** to exit the installer.
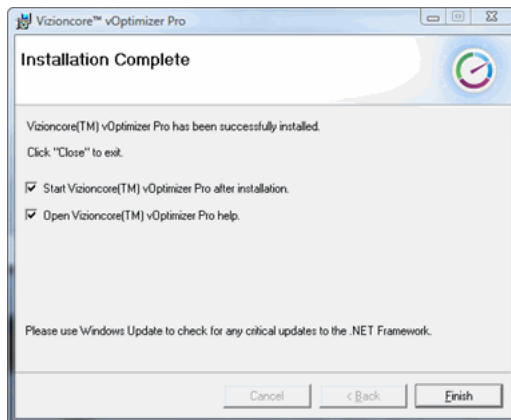
Uninstalling vOptimizer Pro

Uninstalling vOptimizer Pro is a simple process utilizing the application's installer.

To remove vOptimizer Pro:

Step 1: vOptimizer Pro Installer

1 From the Windows desktop, click **Start>Programs>Vizioncore> Vizioncore™ vOptimizer Pro>Uninstall Vizioncore™ vOptimizer Pro**

The Vizioncore™ vOptimizer Pro Setup Wizard appears.
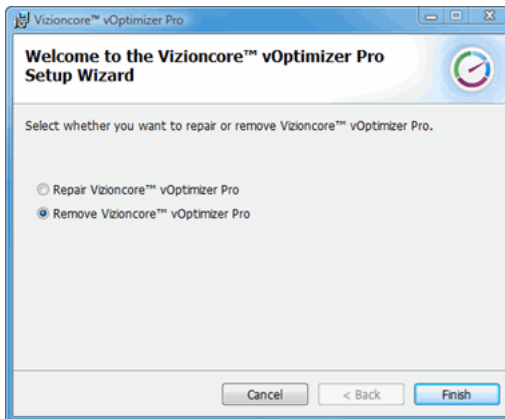
2 Select **Remove Vizioncore™ vOptimizer Pro**.

3 Click **Finish**.

Step 2: vOptimizer Pro Database

vOptimizer Pro maintains a Cost Statistics database. You are prompted to choose to keep this database or delete it.
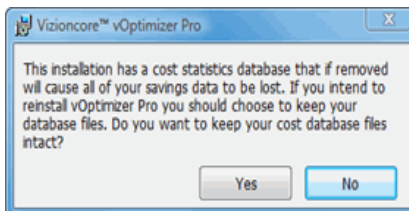
1 If you are going to reinstall vOptimizer Pro, click **Yes**.

This will save the vOptimizer Pro database to be used by future installations.

or

If you are not going to reinstall vOptimizer Pro, click **No**.

Caution   This will permanently delete the Cost Statistics database.

2 The removal completes.
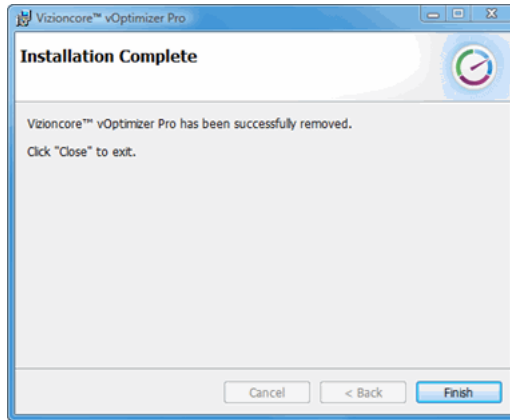
Click **Finish**.

Running vOptimizer Pro

This chapter contains the following sections:

Before You Get Started

The instructions in this chapter assume that you have already installed vOptimizer Pro. If you have not, see "Installing a new version of vOptimizer Pro" on page 28 for installation instructions.

Starting vOptimizer Pro

After the installation is complete, you can access vOptimizer Pro through the Start menu:

- Choose **Start>Programs>Vizioncore> Vizioncore™ vOptimizer Pro>Vizioncore™ vOptimizer Pro**

Note	You may also access the *vOptimizer Pro User Guide* and the online help file from the same location

vOptimizer Pro Service

The vOptimizer Pro Service must be running in order for vOptimizer Pro to operate.

To verify the Service is running:

1 From the Start menu, right-click on My Computer

2 Click **Manage**

3 Scroll down to find **vOptimizer Pro Service**

If the vOptimizer Pro Service is running, you will see "Started" under the Status column.

or

If the vOptimizer Pro Service is stopped, highlight the service and click **Start**
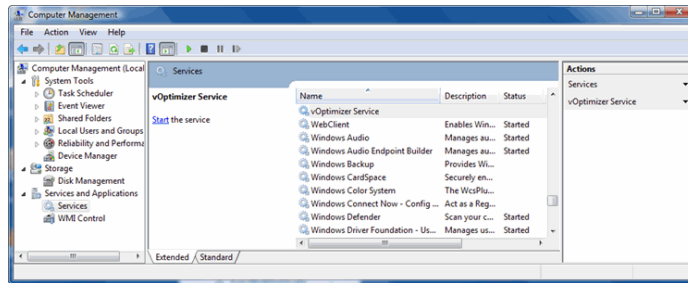
Licensing

vOptimizer Pro includes a fourteen day evaluation period during which you may perform two optimizations. To use vOptimizer Pro after that evaluation period, or for more machines, you must purchase a license and activate the application. There are two methods by which vOptimizer Pro can be activated:

- Online Activation
- Offline activation via e-mail with Vizioncore.

Online Activation

Online activation is the most direct method of activating vOptimizer Pro. Before beginning the online activation, verify that the machine on which vOptimizer Pro is installed has a live connection to the internet

In order to activate vOptimizer Pro, you will need the serial number provided to you via e-mail from Vizioncore.

Step 1: Product Activation Wizard

vOptimizer Pro activation is accomplished via a simple wizard that is accessed from the **Help** menu.

- From the vOptimizer Pro user interface, click **Help,** then **Activation.**

  The **Product Activation Wizard** dialog appears.
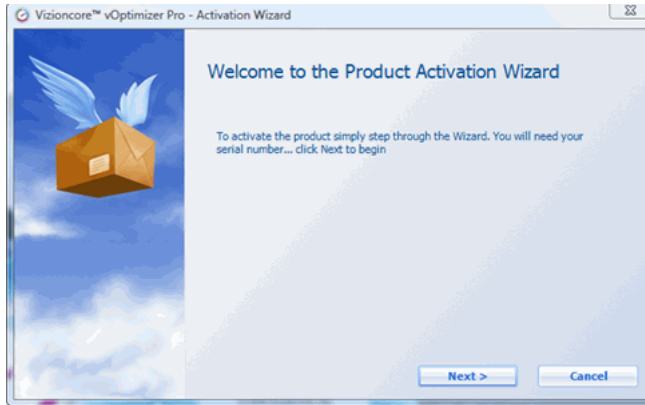
Step 2: Activation Type

Online activation occurs via communication over the internet between the vOptimizer
Pro machine and the Vizioncore license server. If you use a proxy server for internet
access, configure your proxy information by clicking **Proxy Settings**. For more
information on Offline Activation "Offline Activation" on page 40

1   Select **Activate online with Vizioncore**. Click **Nex**t.
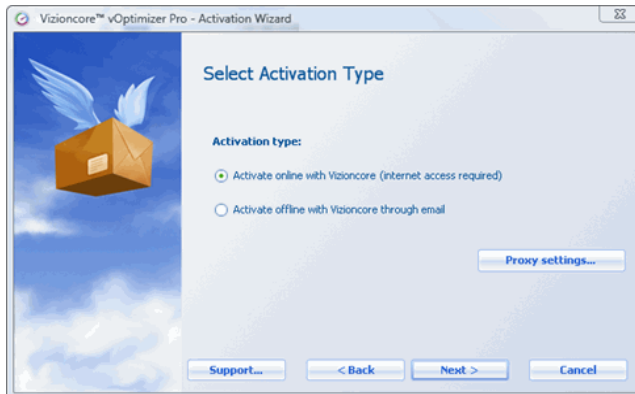
Step 3: Activation Information

1   The Enter Activation Information dialog appears. Enter your serial number in the
Serial number field. Click **Next.**

Note   Your serial number must be entered exactly as it appears in your license e-mail.
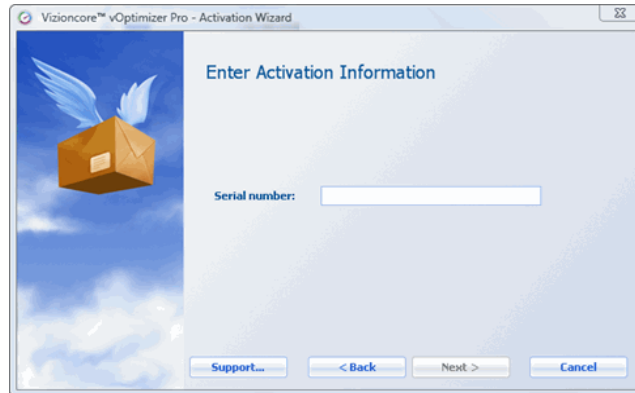
Step 4: Activation Completed

The Activation Completed message appears. vOptimizer Pro is now activated.

1 Click **Finish** to close the dialog.
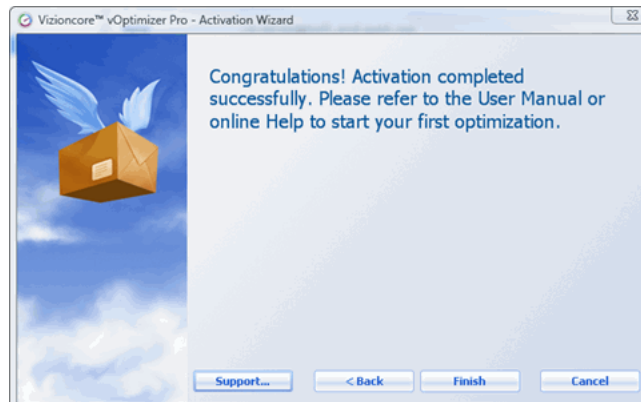
Offline Activation

If an internet connection is not available to the vOptimizer Pro machine, you may perform an offline activation. Offline activation requires an active email account and email client.

To perform an offline activation:

Step 1: Product Activation Wizard

vOptimizer Pro activation is accomplished via a simple wizard that is accessed from the **Help** menu.

- From the vOptimizer Pro user interface, click **Help,** then **Activation.**

    The **Product Activation Wizard** dialog appears.
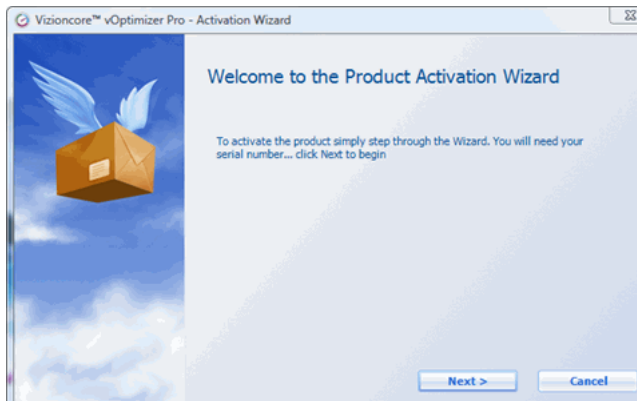
Step 2: Activation Type

1 Select **Activate offline with Vizioncore**. Click **Nex**t.
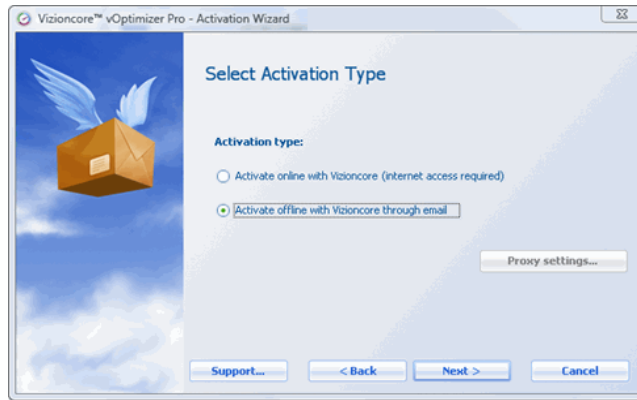
The Create Activation Request dialog displays.

Step 3: Activation Information

1 The Enter Activation Information dialog appears. Enter your serial number in the **Serial number** field. Click **Next.**

> **Note** Your serial number must be entered exactly as it appears in your license e-mail.
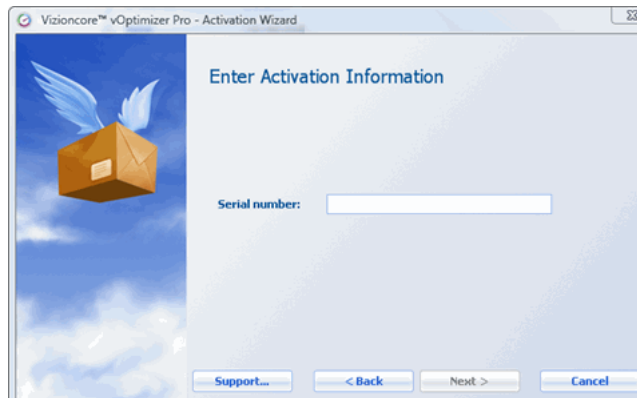
Step 4: Create Request

Offline activation is accomplished by sending a machine specific request file to Vizioncore via email. This step of the activation process creates and names the folder per your specifications.

1 Click the browse icon to select the destination for the request file.
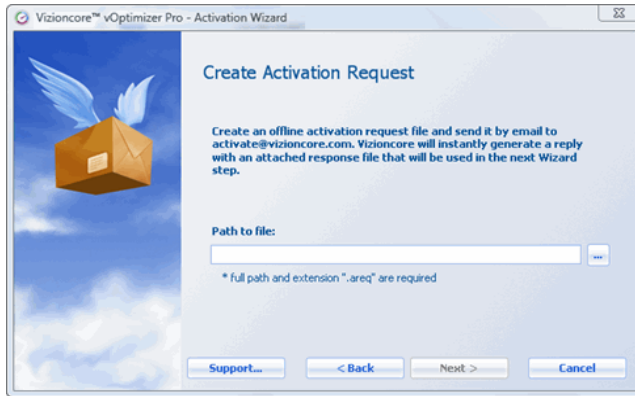
2 Browse to the desired location, and enter a name for the file.

Caution Do not change the file extension. Request files must have a *.areq* extension.
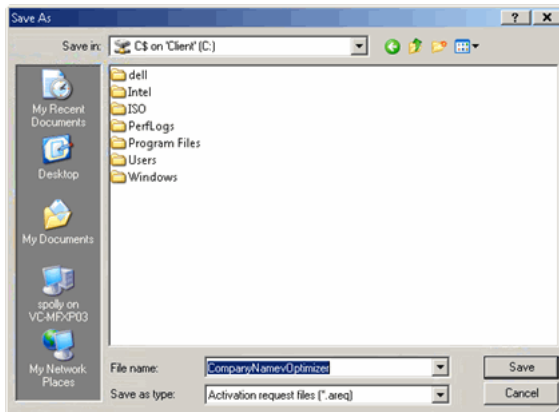
Step 5: E-mail Request

1 E-mail the request file to activation@vizioncore.com.

> **Note** It is not necessary to specify a subject or provide any details in the email. This is an automated process

2 After a few moments, you will receive an automated response that contains your license file. Save this file to a location accessible to the vOptimizer Pro machine.

Step 6: Open Response File

After receiving the response email from Vizioncore, return to the Product Activation Wizard.

1 Browse to the location of your response file. Click **Open.**

2 Click **Next**.

Step 7: Activation Completed

The Activation Completed message appears. vOptimizer Pro is now activated.

1 Click **Finish** to close the dialog.
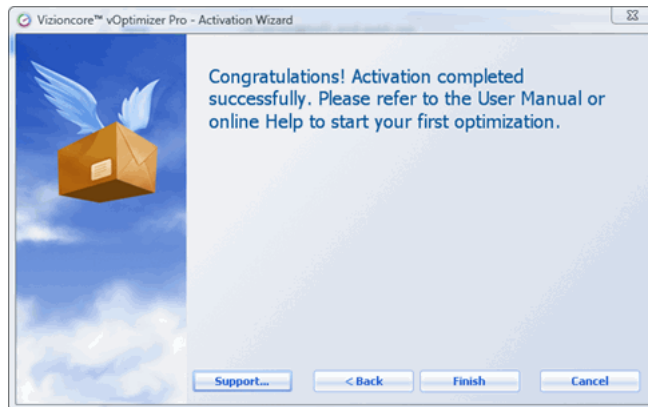
ESX Server Configuration

vOptimizer Pro must be configured to connect to VMware® Virtual Infrastructure components prior to using the program. vOptimizer Pro can be configured to connect to VirtualCenter - to manage multiple ESX Servers - or configured with connections to ESX Servers on an individual basis.

To configure:

- A VirtualCenter connection, see "Connecting to VirtualCenter" on page 44

- An individual ESX Server connection, see "Connecting to an ESX Server" on page 48

Connecting to VirtualCenter

Step 1: ESX Server Tab

1   From the interface, click on the **ESX Servers** tab.

When accessing the ESX Server tab for the first time, the Welcome to the ESX Server dialog appears.

2   In the Welcome to ESX Server dialog, click **VirtualCenter**.

The New VirtualCenter Wizard appears. This wizard walks you through the process of configuring credentials for a VirtualCenter connection as well as credentials for each managed ESX Server.

Step 2: VirtualCenter Settings

1 In the New VirtualCenter Wizard, enter the required information:

a **IP Address:** Enter the IP address of the VirtualCenter server. This field accepts only IP addresses.

b **Port SDK:** This port is used for API calls to VMware's SDK. The default value is 443.

c **Name:** This field will automatically populate with the name of the VirtualCenter server.

d **User name:** Enter the user name of an account with Administrator access to the VirtualCenter.

e **Password/Verify Password**: Enter the password for the account used.

f **Timeout:** This defaults to 5 seconds.

2 Click **Next**.

Step 3: Default Credentials - All Hosts

vOptimizer Pro offers the option of configuring a single set of credentials for all ESX Server hosts or specifying credentials for each host individually. For information on configuring credentials for individual hosts, see "Step 3a: Default Credentials - Individual Hosts" on page 47

1 In the **Default root level credentials** dialog, select **Use a single default . . .**

2 Click **Next**.

The Default ESX Host Settings dialog appears:
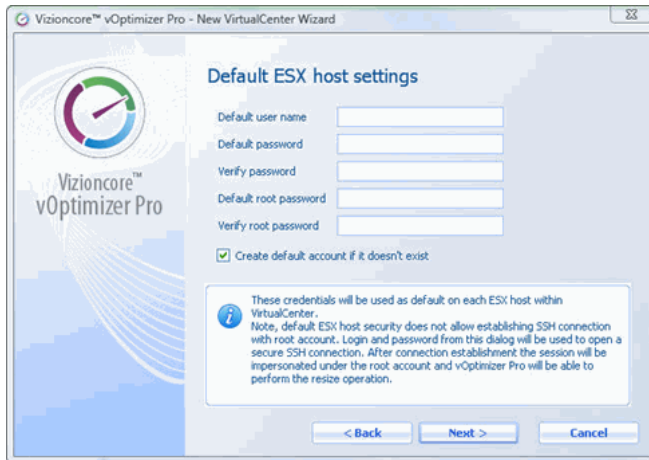
3 In the Default ESX Host settings dialog, enter the required information:

   a **Default user name:** Enter the name of an account with non-root access to the ESX Servers managed by the configured VirtualCenter.

      Note This account does not have to exist, vOptimizer Pro can create the account for you.

   b **Default password/Verify Password**: Enter the password for the non-root account.

   c **Default Root Password/Verify Root Password**: Enter the password for the *root* account on your ESX Servers.

4 If the non-root account entered above does not exist on the managed ESX Servers, select **Create default account if it doesn't exist**.

   Note If the configured account already exists on an ESX Server with a different password, it will not be created.

5 Click **Next**.

   Note If the default non-root username or password is not valid for an ESX Server, the warning screen will appear. If an ESX Server has a non-standard security configuration, you may configure a connection to that host individually. For more information, see "Step 3a: Default Credentials - Individual Hosts" on page 47.

6 Click **Finish** to complete the wizard.

Step 3a: Default Credentials - Individual Hosts

1   In the New VirtualCenter Wizard, select **Specify root lever user . . .**

2   Click **Next.**

The Configure ESX Host Settings dialog appears.

3   In the Configure ESX Host Settings dialog, enter the required information:

a   **User name:** Enter the name of an account with non-root access to the ESX Server.

   Note   This account does not have to exist, vOptimizer Pro can create the account for you.

b   **Password/Verify Password**: Enter the password for the non-root account.

c   **Root Password/Verify Root Password:** Enter the password for the *root* account on your ESX Server.

d   **Port SDK:** This port is used for API calls to VMware's SDK. The default value is 443.

e   **Port SSH:** This is the port used for SSH traffic. Default value is 22.

f   **Port:** Default value is 422. This value should not be changed.

g   **Timeout**: Default value is 5 seconds.

4 Click **Test Connection**.

If the connection is properly configured, a success message appears:
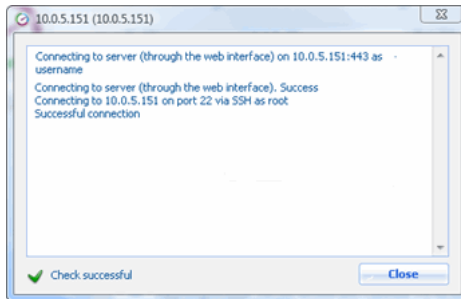
5 Click **Next.**

Note vOptimizer Pro will automatically repeat this process for each ESX Server managed by the configured VirtualCenter.

Connecting to an ESX Server

Step 1: ESX Servers Tab

1 From the interface, click on the **ESX Servers** tab.

When accessing the ESX Server tab for the first time, the Welcome to the ESX Server dialog appears.

2 In the Welcome to ESX Server dialog, click **ESX Server**.

The New ESX Server Wizard appears. This wizard walks you through the process of configuring credentials for connection to an ESX Server.

Step 2: ESX Server Settings

1 In the New ESX Server Wizard, enter the required information:

a **IP address:** Enter the IP address of the target ESX Server.

b **Port SDK:** This port is used for API calls to VMware's SDK. The default value is 443.

c **Name:** This field will automatically populate with the name of the ESX Server.

d **Port SSH:** This is the port used for SSH traffic. Default value is 22.

e **User name:** Enter the user name of a non-root account for vOptimizer Pro to use to connect to the ESX Server.

f **Port:** Default value is 422. This value should not be changed.

g **Password/Verify Password**: Enter the password for the non-root account.

h **Timeout:** This defaults to 5 seconds.

i **Root Password/Verify Root Password:** Enter the password for the *root* account on your ESX Server.

2 Click **Test Connection**.

If the connection is properly configured, a success message appears:
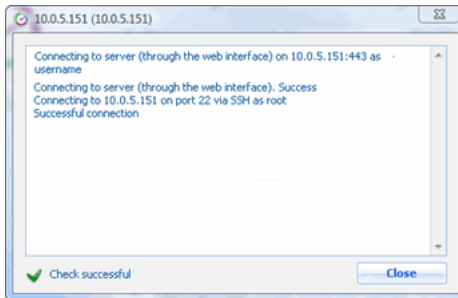
3 Click **Next**.

The Congratulations dialog appears:

4 Click **Finish**

Step 3: Add Additional ESX Servers

1 From the Servers pane, click the Add ESX Server button [image].

2 Repeat procedure described in "

Note This concludes the initial setup of Vizioncore™ vOptimizer Pro. For more information, please refer to the *vOptimizer Pro User Guide* or the online help.