

# Portlock Storage Manager

## Quick Start Guide

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## Quick Start Guide

### Introduction

This chapter assumes that you are a new user and that you want to quickly install Portlock Storage Manager Client, download the Portlock Boot CD, install Portlock Storage Manager for NetWare to a NetWare server and install your Portlock Storage Manager license.

Portlock Storage Manager Client is the primary product that manages storage on NetWare servers. Supporting products include Portlock Storage Manager for NetWare and Portlock Boot CD. These products are designed to work together to make managing NetWare storage easy.

### Overview

- Step 1: Install Portlock Storage Manager Client.
- Step 2: Download Portlock Storage Manager for NetWare.
- Step 3: Import your Portlock Storage Manager License.
- Step 4: Install Portlock Storage Manager for NetWare and License to NetWare.
- Step 5: Download the Portlock Boot CD.
- Step 6: Burn the Portlock Boot CD.

### Requirements

- X86 or X64 versions of Windows XP SP2, Windows Vista SP1, Windows 7 or later versions.
- Novell Client.\*
- NetWare 3.12, 4.11, 5.x or 6.x.

\*If the Novell Client is not installed, then PSMAGENT.NLM needs to be loaded on the NetWare server. PSMAGENT.NLM is part of the Portlock Storage Manager for NetWare package. You can manually copy this file to your NetWare server via a floppy diskette and then load it on your server. You can then use Portlock Storage Manager Client to complete the installation. Another option is to install from the Portlock Boot CD (See Appendix A). Note: This also requires that TCP/IP is installed on the NetWare server.

### Portlock Storage Manager for NetWare

Portlock Storage Manager for NetWare runs on NetWare servers. Portlock Storage Manager (STORMGR.NLM) is a NetWare Loadable Module (NLM) that is run from the NetWare console or launched remotely by Portlock Storage Manager Client. Portlock Storage Manager for NetWare includes a remote agent "PSMAGENT.NLM" that provides support for Portlock Storage Manager Client when the Novell Client is not installed on the workstation.

### Portlock Storage Manager Client

Portlock Storage Manager Client is a Windows program that manages NetWare Servers, VMware ESX Servers, VMware Workstation, Portlock licenses and products, downloads, libraries of objects (Portlock Images, ISO Images, etc.).

## Portlock Boot CD

The Portlock Boot CD is a complete bootable operating system based upon WinPE 2.1 (Windows Server 2008) or for older hardware WinPE 1.6 (Windows Server 2003). Portlock Storage Manager for NetWare running on the Portlock Boot CD has nearly the same feature set as when running on NetWare. There are also specialized versions available tailored for VMware.

## Primary Interface

The Portlock Storage Manager Client organizes everything as a tree structure. In the following screenshot notice the five primary interfaces. The main menu has commands for most operations. The toolbar has buttons for common commands and features. The left window shows objects in a tree structure and the right window shows details on the item selected in the tree window. The tree window supports a number of commands thru right-click menus. The bottom tab windows shows status for commands and controls built-in services (right-click on a tab to access their menus).



### Key tree window objects:

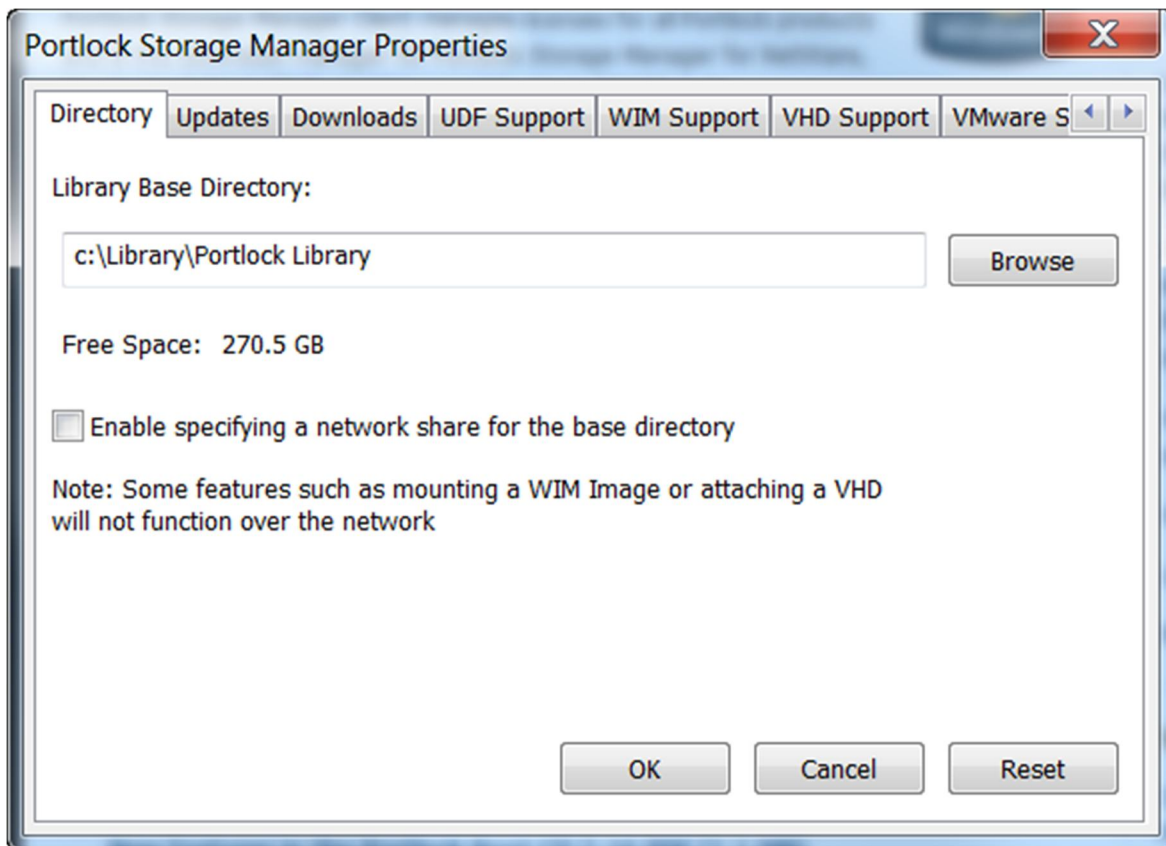
- Remote Systems. NetWare servers and systems booted with the Portlock Boot CD appear here.
- Portlock Licenses. This tree object stores Portlock Licenses.

- Portlock Storage Manager Library. This tree object stores Portlock Storage Manager for NetWare installation packages.
- Portlock Image Library. This tree object stores Portlock Images for remote systems.
- ISO Library. This tree object stores ISO image files for Portlock products as well as any type of ISO image file.
- WIM Library. This tree object stores WIM image files.
- Microsoft VHD Library. This tree object stores Microsoft Virtual Disks. This is primarily for the Portlock Leap Frog product.

### Step 1: Install Portlock Storage Manager Client

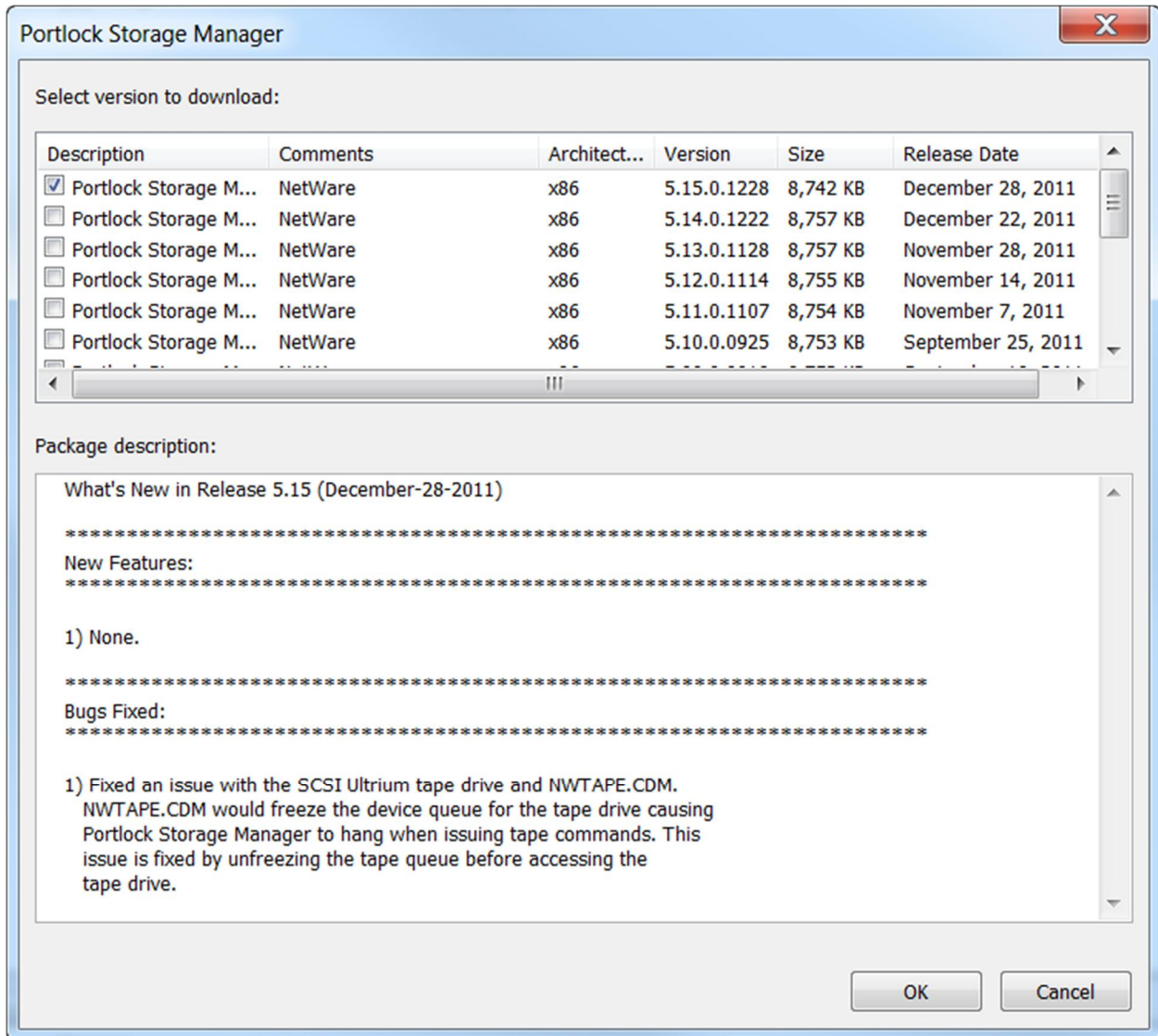
Download Portlock Storage Manager Client from the Portlock web site. The installer is a dual 32-bit / 64-bit MSI based application that will install the correct version (32-bit / 64-bit) for your Windows platform.

The first time that Portlock Storage Manager Client is started, a properties dialog box will display. This dialog box controls a number of properties. The important item here is to set the "Library Base Directory". This will be the root directory used for Portlock Storage Manager Object storage. You can change this directory later at any time (right-click on Portlock Library and select Change Base Directory in the tree window).



## Step 2: Download Portlock Storage Manager for NetWare

Click the "PSM" icon from the Portlock Storage Manager Toolbar. This will launch the dialog to download Portlock Storage Manager for NetWare. Select the latest version in the dialog box. Once the download completes Portlock Storage Manager will be saved to the tree window item "Portlock Storage Manager Library".



## Step 3: Import your Portlock Storage Manager License

When you purchase Portlock Storage Manager, a license file is emailed to you. You will need to import this license into Portlock Storage Manager. A Portlock License is a binary file that has information about the number of servers that are licensed, customer information, etc. The Portlock License ends with the file extension ".lic" but is often emailed as a zip file. Portlock Storage Manager supports importing Portlock Licenses that are part of a zip file or a binary file.

Typically a Portlock License is emailed in zip format. From the toolbar select "Import". This launches a Windows file dialog box to browse for the selected file. You can also drag-and-drop the file from Windows Explorer onto the Portlock Storage Manager left tree window.

#### Step 4: Install Portlock Storage Manager and License to NetWare

*The Novell Client on Windows Vista / 7 does not support NetWare 3.x or 4.x servers. Therefore this step will not work in this situation. Go to Appendix A to manually install Portlock Storage Manager from the Portlock Boot CD.*

*If the Novell Client is not installed on your workstation, then go to Appendix A to manually install Portlock Storage Manager from the Portlock Boot CD.*

To install Portlock Storage Manager on a NetWare server, expand the tree window item "Remote Systems". Expand "NetWare Servers". Select the NetWare server in the tree window. Right-click and select "Install / Update Portlock Storage Manager".

If your NetWare server does not appear in the tree, right click on "NetWare Servers" and select "Add NetWare Server". Enter the NetWare server name or TCP/IP address.

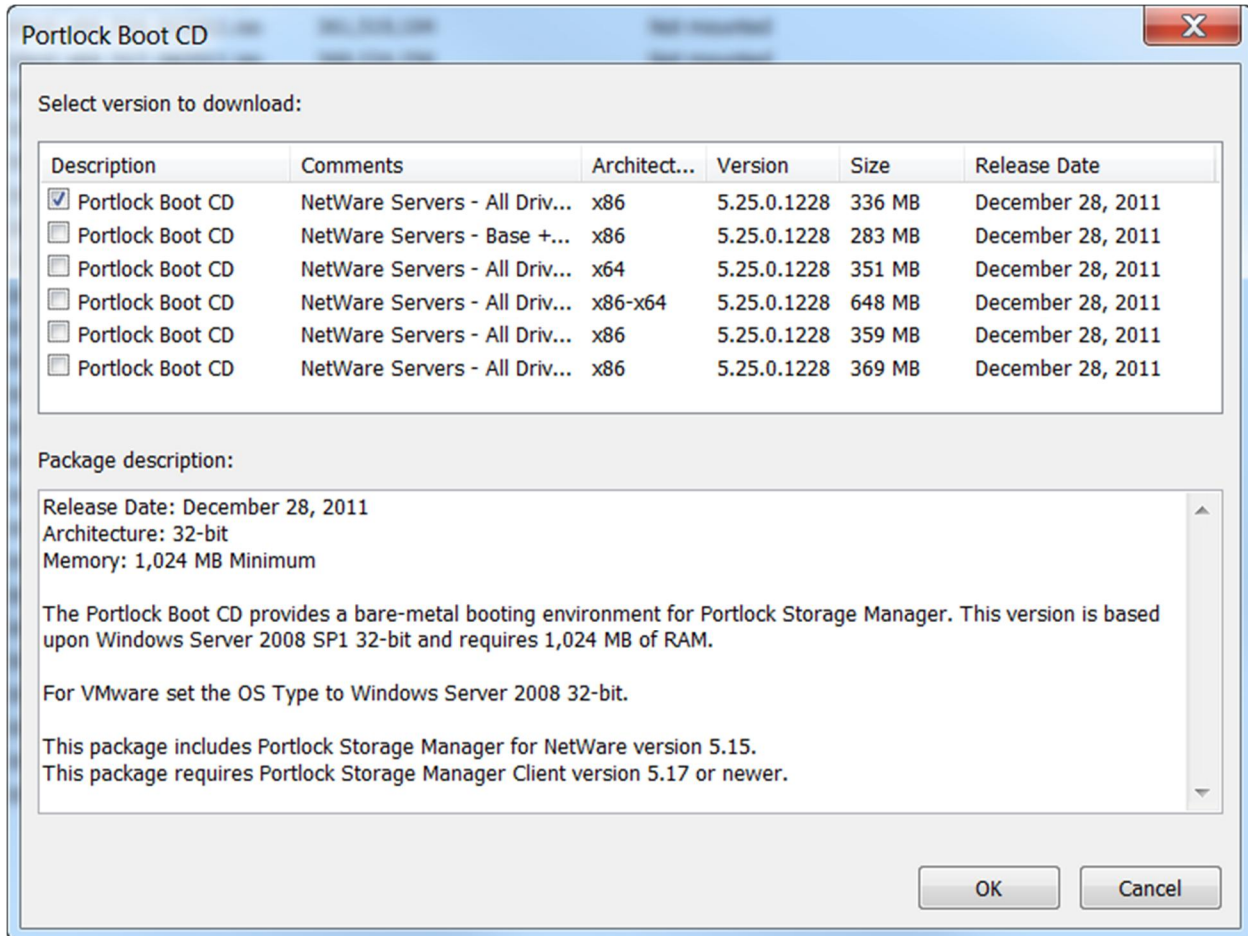
The Portlock Install Wizard will be started to step you thru installing Portlock Storage Manager and license to the server.





## Step 5: Download the Portlock Boot CD.

The Portlock Boot CD is shipped in three different formats. A 32-bit version (x86), a 64-bit version (x64) and a dual boot version that supports booting from either 32-bit or 64-bit images. To download the Portlock Boot CD click on the "PBCD" icon in the toolbar. A dialog box will be displayed to select the desired versions. After the download completes the files will be stored in the tree window item under "ISO Library/Portlock Boot CD".



## Step 6: Modify Portlock Boot CD Options

The Portlock Boot CD supports a number of user configuration options such as time zone, keyboard, language, display size, network, and drive mapping.

- In the left tree window expand "ISO Library".
- Expand "Portlock Boot CD".
- Right-click on the Portlock Boot CD ISO image.
- Select "Modify WinPE Options".
- Follow the wizard to change desired features of the Portlock Boot CD.

Suggested changes:

- Under the “Display Settings” page change to “1024 x 768”. Note: some older servers do not support greater than 800 x 600.
- Under the “Language” page set your desired language and keyboard.
- Under the “Time zone” page change to your desired time zone.
- If you do not have a DHCP server on your network, then under the “Network” page assign a static TCP/IP address to the Portlock Boot CD. Note: The network option requires Portlock Boot CD version 3.32 or newer.

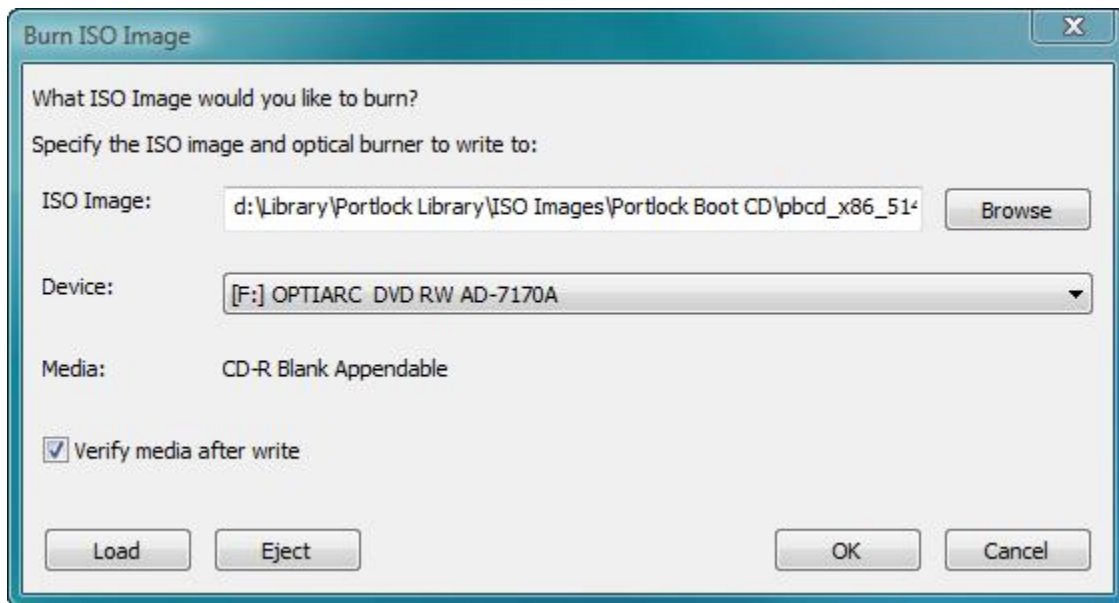
### Step 7: Burn the Portlock Boot CD

To burn the Portlock Boot CD to optical media, expand the tree window item “ISO Library”. Expand “Portlock Boot CD”. Select the ISO image file for the Portlock Boot CD that you downloaded in step 5. Right-click and select “Burn ISO Image”. A dialog will be displayed to select the burn options.

Note: You can inject your Portlock License into the ISO image file prior to burning to optical media. Right-click and select “Inject license into ISO Image”.

Note: If you have installed Portlock Storage Manager for NetWare and your Portlock License to the NetWare server, then the Portlock Boot CD will not need a Portlock License as the license will be read from the NetWare server’s SYS volume as the Portlock Boot CD boots up.

Note: The Portlock License can also be installed after the Portlock Boot CD boots up with Portlock Storage Manager Client.



## Appendix A. Manually installing Portlock Storage Manager for NetWare

### Installing from the Portlock Boot CD

1. Download the Portlock Boot CD.
  - a. Complete Step #5 above.
2. Burn the Portlock Boot CD to a CDROM.
  - a. Complete Step #6 above.
3. Insert the Portlock Boot CD into a drive on your server.
  - a. Wait a few seconds and at the server console type "volumes". A new volume named "PBCD" should appear. The detection of the CD can take up to a minute.
  - b. For older versions of NetWare you must manually mount the CD first.
    - i. For NetWare 3.x and 4.x:
      1. Type "load CDROM".
      2. Type "CD DEVICE LIST"
      3. Type "CD MOUNT PBCD"
4. Launch the Portlock Install Program and complete the installation.
  - a. At the server console type "load PBCD:/STORMGR/PINSTALL".
5. Launch the Portlock Agent.
  - a. At the server console type "load SYS:/STORMGR/PSMAGENT".

Advanced users: The communications between Portlock Storage Manager Client and the NetWare server is provided by PSMAGENT.NLM. This NLM is part of the Portlock Storage Manager for NetWare package. You can manually copy this file to your NetWare server via a floppy diskette and then load it on your server. You can then use Portlock Storage Manager Client to complete the installation.

PSMAGENT.NLM also provides support for Windows Vista and Windows 7 to communicate with NetWare 3.x and 4.x servers which are not supported by the Novell Client. Novell dropped support for NetWare 3.x and 4.x servers for Windows Vista and later operating systems (Windows Vista and later do not support the IPX protocol which is required by NetWare 3.x and 4.x).

## Appendix B. Portlock Remote

### Introduction

Portlock Remote is a Windows program for remotely viewing and controlling Portlock Storage Manager for NetWare running on a NetWare server from Windows.

Note: This feature for remotely controlling Portlock Storage Manager for Netware was released in Portlock Storage Manager Client 5.30 and Portlock Storage Manager 5.20 in May 2013.

Note: This feature requires that TCP/IP is installed on the NetWare server.

### Launching Portlock Storage Manager for NetWare

- 1) Start Portlock Storage Manager Client.
- 2) Expand "Portlock Library" in the left tree window.
- 3) Expand "Remote Systems".
- 4) Expand "NetWare Servers".
- 5) Right-click on the NetWare server. Select the menu item "Portlock Storage Manager -> Start Portlock Storage Manager with Local Console".

Portlock Storage Manager Client will start Portlock Storage Manager for NetWare on the selected NetWare server. Then Portlock Remote will be started on your desktop. Portlock Remote will connect to Portlock Storage Manager for NetWare.

## Frequently Asked Questions

### How do I manually install Portlock Storage Manager for NetWare on my NetWare server?

Refer to Appendix A.

### There are a number of Portlock Storage Manager for NetWare versions, which one should I download?

If you are a new customer, select the newest version (highest version number). If you are an existing customer, select the version that is supported by your Portlock Storage Manager license.

### There are a number of Portlock Boot CDs, which one should I download?

The quickest answer is to download the 32-bit version based upon Windows Server 2008.

The Portlock Boot CD is based upon two versions of WinPE: Windows Server 2003 and Windows Server 2008.

The Server 2003 version supports old servers built prior to 2005 that do not have ACPI built into the motherboard. ACPI is required to support WinPE built with Windows Server 2008. The Server 2003 version also has reduced memory requirements and will boot in only 256 MB of memory. There are two releases of this build, one with and one without ramdisk boot. The ramdisk version requires an additional 300 MB of memory to load the ISO image into memory.

The Server 2008 version requires modern hardware but is the best version. This version has an extensive library of drivers and hardware support (20,000+ drivers). This version is available in a 32-bit, a 64-bit and a dual boot version that includes the 32-bit and 64-bit releases that can be selected at boot.

PBCD based upon Server 2003:

Benefits:

- Reduced memory requirements. The non ramdisk version will boot in 256 MB of memory. The ramdisk version requires 512 MB.
- The ramdisk versions will not blue-screen if there is a missing storage driver for the booting device. The non-ramdisk version requires storage controllers for the booting device and will blue-screen with STOP code 0x7B.
- Supports old hardware: server manufactured prior to 2005. If your server is running NetWare 4.x, you probably need this version.
- Supports drivers that are not supported by Windows Server 2008.

Drawbacks:

- The number of devices supported is not as large as the Server 2008 version.
- Runs slower, but supports older hardware.
- No 64-bit version, therefore large memory systems (4GB+) are limited to apx 3 GB of addressable memory.
- The system boots from an ISO image and is read-only. Device drivers cannot be added after the system boots.

PBCD based upon Server 2008:

Benefits:

- Very large driver set. Almost all storage and networking controllers are supported. New versions are released as new controllers are developed.
- Device drivers can be added after the system boots.
- Higher performance.
- 64-bit version available.
- Better USB device support.

Drawbacks:

- Larger memory requirements. 1 GB is the minimum memory supported. 2 GB for good performance.
- Does not support old hardware that does not have ACPI chipsets on the motherboards.

[End of Document]