

## Imaging a NetSpective Appliance Evaluation Unit

1. You have received a new Evaluation document. If the document does not say anything unusual such as “New Appliance”, you may proceed with the steps below. In the event of a “New Appliance” request, an appliance will be sent to the customer directly from the company that manufactures our appliances and you will not need to worry about sending one out. In this case, Cathy should have a copy of the evaluation document and have the appliance sent out.
  - a. Talk to Cathy and let her know you need a shipping label for the evaluation unit you will be packaging. She is always provided a copy of the Evaluation document you received from the Sales person. Say please and thank you!
  - b. While you are in Cathy’s office, grab the packing tape located in the bottom drawer of the file cabinet to your left, right as you enter her office.
2. In the server room, find a boxed up appliance that can be used for this evaluation. Ensure that everything is in the box that you will need. The smaller box should have two “Quick Start” guides in it, and the larger box should have a “NetSpective” sticker on it. If you need any of these, ask Brett.
  - a. Write down the Serial Number of the appliance on the evaluation sheet.
3. Take the faceplate off of the appliance. The little button to remove it is on the left side, facing the front of the appliance. Plug in two network cables, video cable, keyboard cable, and power cable.
4. Power up the appliance and enter the bios by hitting “DEL” as it’s booting up
  - a. Navigate to the “Advanced” category and down to the PnP tab. Enable the option Rom Scan for one of the ports.
  - b. Save the configuration and reboot.
5. As the device reboots, enter the bios again by hitting “DEL” as it’s booting up.
  - a. Change the order of boot devices so that the Gigabit LAN port is the first device.
  - b. Save the configuration and reboot.
6. Allow the device to fully boot up this time. You may hit “F1” for options, but it is not necessary.
  - a. At the command line, type in “p10” and hit enter. The installation of NetSpective will begin. This will take some time, so go ahead and move to the next step.
7. Back at your PC, generate a new license for this appliance. The IP address for the NetSpective OLS is **192.168.6.12:8080**. You should already be familiar with this utility, as you will need login credentials to access it. If you are unfamiliar with the NetSpective OLS, talk to Rene.
  - a. Click on License and Subscription Administration. You will be asked for your login credentials.
  - b. You will be asked for the serial number of the appliance. You wrote it down on the evaluation sheet.
  - c. Uncheck “Activate” first and apply.
  - d. Enter the name of the customer, the duration of the license (If for 30 days, extend the time a bit so the end date doesn’t fall on a weekday.)(Make sure the date is set to the current year as well.), enter the number of users (If Unlimited enter 10,001.), and enter the number of remote agents as 5.

- e. If the license needs to be set to Proxy mode, check the box labeled Proxy and enter in 100 for the Mbps and 10,000 for the Connection. This may vary depending on the customer, but this is a good default setting, as given by Mark.
  - f. When you are done, recheck "Activate" and apply. Next hit the print button on the bottom and proceed to print out the generated license from your web browser's print function. Pick up the printout on your way to the next step.
8. Back on the appliance, make sure the installation has finished and if it has, reboot the device using "Ctrl+Alt+Del".
9. As the appliance reboots, hit "Del" again and enter the bios.
  - a. Navigate back to the Advanced category and down to the PnP tab. Disable the option for Rom Scan.
  - b. Save the configuration and reboot.
10. Allow the appliance to fully boot up. When you are asked for login credentials, the login name is "admin" and the password is "webfilter".
11. In the NetSpective menu system, option 1 will allow you to Configure Networking. Enter 1 a second time to change the settings.
  - a. IP Address: **192.168.10.26**
  - b. Subnet Mask: **255.255.255.0**
  - c. Gateway: **192.168.10.1**
  - d. Enter 0 to navigate back to the first menu.
12. Enter 2 to navigate to the License Device menu. Enter the license server IP, the license number, and the license password, all found on the license printout you made a few steps ago.
13. Back on your computer's web browser, log into the evaluation appliance by pointing your browser to **192.168.10.26**, the login and password credentials are the same as before. "admin" and "webfilter".
  - a. Find the menu for Updates and click on the link next to it. Press the button "Get Updates" and allow it to find some, most likely it will find some category updates. When it has, click "Install Updates" and wait for the appliance to finish. This may take some time and it is possible that the window will not refresh during the update process. If you think this is the case, just click the link next to "Updates" in the upper left corner. This will manually refresh the screen.
  - b. When the update process has finished, navigate down to the "Shutdown" menu and click on the "Shut Down" button to power down the device remotely.
14. Back in the server room, the appliance should be powered down by now. Unplug all the cables that are connected to it and put the faceplate back on the appliance. Put the appliance back into its pink plastic bag and pack up the box. Make sure that there is nothing missing in the box before you finish putting it all together.
  - a. By this point you should have the shipping label and packing tape from Cathy. Put the boxed NetSpective on the table and flip it upside down. Put two pieces of tape on each side of the box, taping the box closed in the process.

15. Now that the box is all taped up, flip it right-side up onto the table. This is a good time to apply the shipping envelope to the upper left corner of the box as well as the NetSpective sticker in the very center.
16. Now you will need to put two plastic strips around the box. They should sit just above and below the NetSpective sticker horizontally.
  - a. Take the box of plastic strap and remove two of the white buckles. Sit them on the NetSpective box as well as the metal tool that should be nearby. (It looks kind of like an anchor.)
  - b. Pull out enough of the plastic strap to loop around the box approximately one and a half times, so that on the top you have two full lengths of plastic, wrapping around the box, and the part on the top is equal to the width of the box. Use the tool to cut the strap loose from the box that contains the spool of plastic.
  - c. A good tip is to sit the tool on the length of plastic you aren't working with to hold it in place. I usually place it on the right half and start with the left. Take the plastic buckle in hand with the little nub facing up and the two prongs facing away from you, take the left strip of plastic and loop it through the buckle. The strap should come in the center and leave the center in the same direction as that strap, so that the strap is doubled onto itself (the piece of strap that ends would sit on top of the rest of the strap) and forms a loop inside the hole of the buckle. Now take the left prong of the buckle and fold it through the loop you just made, snapping it down left or the nub, and then pulling the loop tight.
  - d. Follow the last step "c" once more for the plastic cord on the right.
  - e. Using the tool in your dominant hand, wrap the length of cord on that side around the bottom portion of the tool (the side without the blade.). This will give you a bit of leverage on the plastic cord. Use the wrapped tool in one hand and grab the other length of cord in the other and pull the straps in opposite directions (Away from each other) to tighten the strap as much as you can. When the strap is nice and snug on the box, you may unwrap the tool and use its bladed edge to trim the excess strap close to the white buckle.
  - f. Turn the box around and follow all these steps in topic 16 again for the second strap. Make sure one strap sits right above the NetSpective sticker and one right below.
17. When you are finished with all the steps, the box should be ready to ship. Normally the box will ship FedEx Ground. Place the boxed up NetSpective appliance on the table that is located next to the main entrance to the Telemate office.
  - a. Please note some of the rare instances. If the appliance needs to be specially delivered overnight (should be noted on the evaluation paperwork as well as the shipping label), FedEx will not normally pick it up. If this is the case, make sure Cathy is aware and ask her nicely to call FedEx up and have them do a special pickup of the box that needs to be shipped. It should still be left on that table near the front door though.