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Configuration Cheat Sheet for the New vSphere Web Client

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Introduction

If you have been working with vSphere 5.1 or 5.5 lately, you have undoubtedly noticed that the latest features such as XvMotion and vSphere Replication are only available on the Web Client. However, since VMware still offers the more familiar Windows based client, you may not have fully embraced the new Web Client as of yet. This may have been made worse by your first experience with the 5.1 version of the Web Client, which was slower than it should have been.

The new 5.5 version of the Web Client is actually much snappier, but I could certainly understand your tendency to avoid using a tool that is unfamiliar to you. It is frustrating to waste time looking for something in one software tool when you know exactly where to locate it in another one. Still, you know that you may as well start using the Web Client because the Windows-based version will end at some point in the not-too-distant future.

With that in mind, I've created this cheat sheet for configuration in the new Web Client. This is not meant to be all inclusive, as I'm not even sure that's possible, but instead I have focused on the most common configuration issues that a vSphere administrator encounters on a daily basis. These include configuration of VMs, networking, storage, resource settings, cluster settings, permissions, and many other settings.

This cheat sheet is meant to be a guide that you can refer to as you bravely begin to use the new Web Client. It will also assist you in performing the tasks that are not possible on the Windows-based client.

Every configuration challenge that I could think of is listed alphabetically and includes at least one set of steps for the solution (some can be done in two or more ways). Now, I'm sure that I have missed just as many as I've found; in fact, that is where I could use your help. If you would like to add to this cheat sheet, simply send me an email (bill.ferguson@globalknowledge.com) with your additions and I will make sure they are included. Let's have some fun with this and keep adding to the list!

Configuration Task	Directions
Adding a new device to a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click the drop down next to "New device" at the bottom of the dialog box, select your new device from the drop down list, click "Add"
Activating the software iSCSI initiator on a host	From "Hosts and Clusters" view, click on the host on which you want to activate the Software iSCSI initiator, click on the "Manage" tab and then on the "Storage" tab, ensure that "Storage Adapters" is chosen in the blue area, click on the first icon that looks like a "+" sign and is the "Add new storage adapter", click "OK"
Adding a host to a vSphere distributed switch	From "Networking" view, right-click on the VDS on which you want to add a host, click "Add and Manage Hosts...", select "Add hosts" and click "Next", select from the list of visible hosts, follow the wizard to establish virtual and physical connections
Adding a host to an existing NFS datastore	From "Datastore and Datastore Clusters" view, right-click on the datastore on which you want to add a host, select "All vCenter Actions", click "Mount Datastore to Additional Host", select the host that you want to add and click "OK"
Adding a new license to a vCenter and/or Host	From "Home", click on the "Licensing" icon in the "Administration" section of the details pane, on the drop- down box next to "vCenter Server" choose the vCenter server that you want to manage, click on either "vCenter Server Systems" or "Hosts", click on "Assign License Key..."
Adding a virtual adapter to a vSphere Distributed Switch	From "Networking" view, click on the switch on which you would like to add the adapter, click on the "Manage" tab and then on the "Settings" tab, in the blue area ensure that "Topology" is selected, click the second icon at the top of the page with the pop-up that reads "Add hosts to this distributed switch and add or migrate physical network adapters", select to "Manage Host Networking" and click "Next", use the green "+" to show all hosts that are visible to vCenter, select only the "Manage VMkernel Adapters" check box, click the "New Adapter" link at the top of the page, select the port group to which you want to add the adapter and follow the wizard to configure the rest of the adapter properties
Adding Virtual Flash Resources to a host	From "Hosts and Clusters" view, click on the host on which you want to add Virtual Flash Resources, click on the "Manage" tab and then on the "Settings" tab, in the blue area expand the "Virtual Flash" section and select "Virtual Flash Resource Management", select from the SSD devices that are automatically detected, if you have recently added new SSD drives, click "Add Capacity to see the new information without restarting the host"
Assigning a Tag to an inventory object	Right-click on the object that you want to assign a tag and click "Assign Tag", choose the appropriate tag from the list on the pop-up and/or create more tags by clicking on the "New Tag icon" at the top left of the pop-up, click "Assign"

Configuration Task	Directions
Assigning Storage Policies to a VM	From "Hosts and Clusters" view, right-click the VM on which you want to assign the Storage Policies, click "Edit Settings", in the blue area expand the hard disk section, from the drop-down list next to "VM storage policy" and select the VM storage policy that you want to assign, for each virtual disk listed select the VM storage policy that you want associated with it, click "OK" to save the changes and apply the policy
Attaching a Host Profile to a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Host profile", click "Attach" in the details pane on the right, select the host profile to attach
Cancelling a Work In Progress	Hover over the item in "Work In Progress", click on the "x" to the right of it
Changing the Display Name of a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab locate "VM name" and type the new Display Name in the box to the right
Changing the Guest OS and Version on a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "General Options" in the blue area, locate "Guest OS" and "Guest OS Version" drop downs and configure accordingly
Configuring 3D Graphics for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on "Video card" in the blue area, click on "Enable 3D Support", click on drop next to "3D Renderer" to specify your settings
Configuring a Floppy Drive for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the drop down next to the Floppy Drive
Configuring a hard disk for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab configure the Hard Disk
Configuring a MAC Address for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on "Network Adapter" in the blue area, click on the drop down next to MAC Address, click on "Manual", finish MAC Address configuration
Configuring a Message of the Day in vCenter	On "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, click on "Message of the Day" in the blue area, click "Edit", type or paste your message
Configuring a VM as an Agent	From "Hosts and Clusters" view, click on the host that you want to configure, click on the "Manage" tab, and then on the "Settings" tab, expand "Virtual Machines" in the blue area, click on "Agent VM Settings", click Edit in the details pane on the right

Configuration Task	Directions
Configuring a VM Port Group as a VLAN	From "Hosts and Clusters" view, click on the host on which you want to modify the port group configuration, click on the "Manage" tab and then on the "Networking" tab, click "Virtual switches in the blue area, click on the switch that contains the port group you want modify, click on the port group as shown on the graphic of the switch below it, click on the "Edit" icon that looks like a pencil, with "Properties" selected in the blue area type the VLAN ID that you want to use in the VLAN ID box, click OK (The VLAN ID should correspond to one used in your physical switch environment)
Configuring a VM to boot once to the BIOS setup screen	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "Boot Options" in the blue area, locate "Force BIOS setup", check the box next to "The next time the virtual machine boots, force entry into the BIOS setup screen"
Configuring Administrator contact information for a VDS	From "Networking" view, right-click on the switch on which you want to configure Administrator contact information, in the blue area click on "Advanced", configure the name and other details for an Administrator as needed; for example a cellular phone number or email address can be configured here
Configuring Advanced Settings in vCenter	From "Hosts and Clusters" view, click on a vCenter in inventory pane on the left, click on the "Manage" tab and then on the "Settings" tab, click on "Advanced Settings" in the blue area, view your current settings, click "Edit" at the top of the screen across from "Advanced vCenter Server Settings" to modify any settings as needed
Configuring Advanced System Settings for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Advanced System Settings", find your setting in alphabetical order on the "Name" column on the right
Configuring Advanced vCenter Server Settings	On "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, click on "Advanced Settings" in the blue area, click "Edit", type or paste your message
Configuring an ESXi host as an NTP client	From "Hosts and Clusters" view, click on the host that you want to configure as an NTP client, click on the "Manage" tab and then on the "Settings" tab, in the blue area expand "System" if necessary and select "Time Configuration", choose the radio button for "Use Network Time Protocol", enter the IP address of the NTP server in your network, click "OK" to complete the configuration and start the services
Configuring authentication services for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Authentication Services", click "Join Domain" in the details pane on the right, or click "Import Certificate"
Configuring Boot Options for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "Boot Options" in the blue area, configure your options for firmware, boot delay, and so on.

Configuration Task	Directions
Configuring CDP for a vSphere Distributed Switch	From "Networking" view, right-click on the switch on which you want to enable CDP, in the blue area click on "Advanced", choose "Cisco Discovery Protocol" for the type on the drop-down box under "Discovery protocol", configure for Listen, Advertise, or both as needed
Configuring CPU Affinity for a VM	From "Hosts and Clusters" view, right-click on the powered-off VM on which you want to configure CPU affinity and click "Edit Settings", in the blue area expand "CPU", in the "Scheduling Affinity" section supply a list of the CPU cores this VM is allowed to access, click "OK" to save the changes
Configuring Database settings for vCenter	From "Hosts and Clusters" view, click on a vCenter in inventory pane on the left, click on the "Manage" tab and then on the "Settings" tab, click on "General" in the blue area, expand "Database" in the blue area to view your current settings, click "Edit" and then click "Database" to configure your database settings as needed
Configuring Default VM Compatibility for a Host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Virtual Machines" in the blue area, click on "Default VM Compatibility", click Edit in the details pane on the right
Configuring HA/DRS VM Overrides on a cluster	From "Hosts and Clusters" view, click on the cluster that contains the VM that you want to configure, click the "Manage" tab and then the "Settings" tab, in the blue area, click on "VM Overrides", on the right under "VM Overrides", click "Add", click the "+" to add and view the VMs on the cluster, click the VM (or VMs) on which you want to apply the override and then click "OK", click on the appropriate drop-down(s) to set "Automation level", "Restart priority", "Host isolation response", and "VM Monitoring" for this VM or group of VMs
Configuring Host Image Profile Acceptance Level for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Security Profile", click "Edit" in the details pane to the right of "Host Image Profile Acceptance Level" and configure the settings as needed (you will have to scroll down first)
Configuring LLDP for a vSphere Distributed Switch	From "Networking" view, right-click on the switch on which you want to enable LLDP, in the blue area click on "Advanced", choose "Link Layer Discovery Protocol" for the type on the drop-down box under "Discovery protocol", configure for Listen, Advertise, or both as needed
Configuring Lockdown Mode for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Security Profile", click "Edit" in the details pane to the right of "Lockdown Mode" and configure the settings as needed (you will have to scroll down first)
Configuring Mail for vCenter	From "Hosts and Clusters" view, click on a vCenter in inventory pane on the left, click on the "Manage" tab and then on the "Settings" tab, click on "General" in the blue area, expand "Mail" in the blue area to view your current settings, click "Edit" and then click "Mail" to configure your Mail server and/or Mail sender as needed

Configuration Task	Directions
Configuring memory for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab configure the Memory
Configuring MTU for a vSphere Distributed Switch	From "Networking" view right-click on the switch on which you want to configure MTU, in the blue area click on "Advanced", configure additional MTU as needed; for example 9000 for jumbo frames
Configuring Netflow on a vSphere Distributed Switch	From "Networking" view right-click on the VDS on which you want to configure Netflow, select "All vCenter Actions" at the bottom of the list, click "Edit Netflow...", configure accordingly to connect to your Netflow collector
Configuring network adapter settings for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the network adapter in the blue area
Configuring network adapter type for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the network adapter in the blue area, click on drop down next to "Adapter Type"
Configuring NPIV for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "Fibre Channel NPIV" in the blue area, configure your NPIV settings to assign a WWN to the VM
Configuring number of VM CPUs	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the drop down next to CPU and select the number of CPUs
Configuring Power Management for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Power Management", click "Edit" in the details pane on the right, enter the administrator credentials and baseboard management control information for the host
Configuring SCSI Bus Sharing	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on "SCSI Controller" to expand, click on drop down next to "SCSI Bus Sharing"
Configuring SCSI controller type for VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on "SCSI Controller" to expand, click on drop down next to "Change Type"
Configuring services for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Security Profile", click "Edit" in the details pane to the right of "Services" and configure the services settings as needed (you may have to scroll down first)
Configuring Single Sign-On Users and Groups	From "Home", with valid credentials for Single Sign-On (ex. administrator@vsphere.local) click "Administration", under "Single Sign-On" click "Users and Groups", click the "+" under "Domain:", configure accordingly

Configuration Task	Directions
Configuring SNMP for a vCenter	From "Hosts and Clusters" view, click on a vCenter in inventory pane on the left, click on the "Manage" tab and then on the "Settings" tab, click on "General" in the blue area, expand "SNMP" in the blue area to view your current settings, click "Edit" and then click "SNMP" to configure your SNMP settings as needed
Configuring Standby response for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "Power Management" in the blue area, locate "Standby response", configure your option to suspend the VM or place the guest OS in standby but leave the VM powered on
Configuring Storage DRS Rules for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "SDRS Rules" tab, click the "+" next to "Add" to create a rule (SDRS must be enabled on the storage where the VMs files reside)
Configuring Storage I/O Setting for a VM's disk	From "Hosts and Clusters" view, right-click on the VM on which you want to configure the Storage I/O setting and click "Edit Settings", in the blue area, expand the hard disk that you want to configure, in the area across from "Shares", configure the shares for the VM's disk as desired for your needs
Configuring Swap to Host Cache	From "Hosts and Clusters" view, click on the host on which you want to configure Swap to Host Cache, click on the "Manage" tab and then on the "Storage" tab, in the blue area, select "Host Cache Configuration", choose from the list of automatically detected SSD drives on your host
Configuring System Resource Allocation for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "System Resource Allocation", click "Edit" in the details pane on the right and configure CPU and Memory settings in the dialog box (you can also choose "Advanced" to fine tune resources to specific host services)
Configuring the firewall for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Security Profile", click "Edit" in the details pane to the right of "Firewall" and configure the firewall settings as needed
Configuring the Guest OS of a VM to lock	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "VMware Remote Console Options" in the blue area, locate "Guest OS lock", click the check box next to "Lock the guest operating system when the last remote user disconnects"
Configuring the maximum number of remote connections to a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "VMware Remote Console Options" in the blue area, locate "Maximum number of sessions", click the check box if not already checked, configure the number you desire in the box provided
Configuring the Network location for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the drop down next to the network adapter

Configuration Task	Directions
Configuring the swap file location for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "Advanced" in the blue area, locate "Swap file location", configure the option that you desire for the location of the swap file
Configuring the swap file location for all VMs in a cluster	From "Hosts and Clusters" view, click on the cluster that you want to configure, click on the "Manage" tab and then on the "Settings" tab, in the blue area, expand "Configuration" and click on "General", on the right side of the screen under "General" the current location of the swap file will be indicated, click "Edit" to the right of the current location to change the location of the swap file for all VMs on the cluster
Configuring the swap file location for all VMs on a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Virtual Machines" in the blue area, click on "Swap file location", click "Edit" in the details pane on the right
Configuring the system swap for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "System Swap", click "Edit" in the details pane to the right of "System Swap" and configure the settings as needed
Configuring the time on a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Time Configuration", click "Edit" in the details pane on the right, choose to set the time manually or configure using an NTP server
Configuring Traffic Shaping on a Port Group	From "Hosts and Clusters" view click on the host on which you want to configure Traffic Shaping, click on the "Manage" tab and then on the "Networking" tab, click on "Virtual switches" in the blue area, click on the switch that contains the port group on which you want to configure Traffic Shaping, click on the specific port group in the picture below, that click on the "Edit" icon that looks like a pencil above the picture, click on "Traffic Shaping" in the blue area, click on the "Override" check box to override the switch settings, change the "Status" to "Enabled", set as needed
Configuring Traffic Shaping on a vSwitch	From "Hosts and Clusters" view, click on the host on which you want to configure Traffic Shaping, click on the "Manage" tab and then on the "Networking" tab, click "Virtual switches" in the blue area, click on the switch on which you want to configure Traffic Shaping, click on the "Edit" icon that looks like a pencil, click on "Traffic Shaping" in the blue area, change the "Status" to "Enabled", set as needed
Configuring vApp Options for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "vApp Options" tab, check the box labeled "Enable vApp options"
Configuring Video Card settings for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on "Video card" in the blue area, specify your settings

Configuration Task	Directions
Configuring Virtual Flash Host Swap Cache for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Virtual Flash" in the blue area, click on "Virtual Flash Host Swap Cache Configuration", click "Edit" across from "Virtual Host Swap Cache Configuration" at the top of the screen
Configuring Virtual Flash Resource Management for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Virtual Flash" in the blue area, click on "Virtual Flash Management", click "Add Capacity" and choose between your SSD drives as needed
Configuring VM CD/DVD to Client Device	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the drop down next to "CD/DVD drive" and select "Client Device"
Configuring VM Startup/Shutdown	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Virtual Machines" in the blue area, click on "VM Startup/Shutdown", click Edit in the details pane on the right.
Configuring VMware Tools Scripts for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "VMware Tools" in the blue area, locate "Run VMware Tools Scripts", click the appropriate check boxes for the OS running on your VM
Configuring VMware Tools settings for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "VMware Tools" in the blue area, configure the appropriate settings
Configuring VMware Tools Upgrades for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "VMware Tools" in the blue area, locate "Tools Upgrades", click the check box next to "Check and upgrade VMware Tools before each power on"
Configuring Wake On LAN for a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "Power Management" in the blue area, locate "Wake on LAN", in the check boxes below "Wake on LAN for virtual machine traffic on:" check the WOL compatible network adapter that you want to use
Configuring SSL settings for a vCenter	From "Hosts and Clusters" view, click on a vCenter in the inventory pane on the left, click on the "Manage" tab and then on the "Settings" tab, click on "General" in the blue area, expand "Database" in the blue area to view your current settings, click "Edit", click "SSL settings" in the blue area, and choose your SSL settings as needed
Creating a new datastore	From "Datastore and Datastore Clusters" view, right-click on the datacenter or the folder in which you want to create the new datastore, select "All vCenter Actions" at the bottom, select
Creating a new distributed switch port group	From "Networking" view, right-click on the VDS for which you want to create the port group, select "New Distributed Port Group", type a name for the new port group and click "Next", configure the port group settings such a port binding, number of ports, and VLAN as needed

Configuration Task	Directions
Creating a new Resource Pool on a DRS enabled cluster	From "Hosts and Clusters" view, right-click on the cluster on which you want to create a new Resource Pool, click "New Resource Pool", type the name of the new Resource Pool and configure the CPU and Memory as needed
Creating a new Role in vCenter	From "Home", click "Administration", in the blue area, click "Roles", click the "+" under the word "Roles" to the right, configure accordingly
Creating a new Tag for inventory management	From "Home", select "Tags", click the "New Tag icon" to open the "New Tag" pop-up, enter the name of your new tag and a description, select "New Category" to see all of the fields available, select the desired fields and whether this should only allow a single tag or multiple tags per object, click "OK" to save the new tag and category
Creating a new VMFS datastore	From "Datastore and Datastore Clusters" view, right-click on the datacenter or the folder in which you want to create the new datastore, select "All vCenter Actions" at the bottom, select "New Datastore", follow the wizard to configure the location, type, and name of your datastore
Creating a new VMkernel port on a vSwitch	From "Hosts and Clusters" view, click on the host on which you want to create the VMkernel port, click on the "Manage" tab and then on the "Networking" tab, click "Virtual adapters" in the blue area, click the "Add Host Networking" icon that looks like a globe with a "+", choose to create a "VMkernel Network Adapter" and follow the wizard to make your choices
Creating a new vSphere Distributed Switch	From the "Home Screen", click on "vCenter" at the top of the screen, click on "Distributed Switches" in the list at the bottom, in the details pane (on the right) click on the "Create a new distributed switch" icon below the "Objects" tab, follow the wizard to name your new switch, select the type of switch and add hosts to it
Creating a Port Group on a vNetwork Standard Switch	From "Hosts and Clusters" view, click on the host on which you want to create the port group, click on the "Manage" tab and then on the "Networking" tab, click "Virtual switches" in the blue area, click on the switch on which you want to add the port group, click on the "Add host networking" icon that looks like a globe with a "+", select the last option "Virtual Machine Port Group for a Standard Switch", follow the wizard to select the switch options, and name the port group
Creating a Scheduled Task for a VM	From "Hosts and Clusters" view, click on the VM, click on the "Manage" tab, click on the "Scheduled Tasks" tab, click on the "Schedule a New Task" link on the top of the "Task" column
Creating a snapshot on a VM	From "Hosts and Clusters" view, right-click on the VM on which you want to create a snapshot, click "Take Snapshot...", enter a name and description (optional) and choose whether to capture the memory and whether to quiesce the guest file system (requires VMware Tools), click "OK"

Configuration Task	Directions
Creating an Advanced Performance Chart for any inventory object	Click on the object in the Inventory Pane, click on "Monitor", click on "Performance", click on "Advanced" in the blue area, click on the "Chart Options" link in the top center of the screen
Defining a Private VLAN on a vSphere Distributed Switch	From "Networking" view, right-click on the switch on which you want to define the Private VLAN, select "All vCenter Actions", click "Edit Private VLAN...", in the "Edit Private VLAN Settings" box click "Add", select the Primary VLAN that you want to use to create additional Isolated or Community VLANs and click "Add", define the VLAN type to create the Private VLAN to be used with port groups, click "OK" to finish and save your new VLANs
Deleting a VM from the vCenter inventory	From "Hosts and Clusters" view right-click on the powered off VM that you want to delete, select "All vCenter Actions" from the bottom of the list, click on "Delete from Disk", confirm the deletion by clicking on "Yes"
Determining Permissions for an Object	Click on the object in the Inventory Pane, click on "Manage", click on the "Permissions" tab
Determining sessions connected to vCenter	From "Hosts and Clusters" view, click on the vCenter object, click on the "Manage" tab, click on the "Sessions" tab below it and to the right, read the information under "Sessions"
Determining storage providers associated with a vCenter	From "Hosts and Clusters" view, click on the vCenter object, click on the "Manage" tab, click on the "Storage Providers" tab below it and to the right, read the information under "Storage Providers"
Determining the location of a VMs .vmx file	From "Hosts and Clusters" view, right-click on the VM that you want to examine, click "Edit Settings", on the "VM Options" tab, click "General Options" in the blue area, locate "VM config file", read the location to the right
Determining the PSP used for a LUN	From "Hosts and Clusters" view, click on the host that is associated with the datastore that contains the LUN you want to examine, click on the "Manage" tab and then on the "Storage" tab, in the blue area, select "Storage Devices", select the LUN that you want to examine and then scroll to the bottom of the list under "Device Details" at the bottom of the screen, view the information to the right of "Path Selection Policy"
Determining the SATP used for a LUN	From "Hosts and Clusters" view, click on the host that is associated with the datastore that contains the LUN you want to examine, click on the "Manage" tab and then on the "Storage" tab, in the blue area, select "Storage Devices", select the LUN that you want to examine and then scroll to the bottom of the list under "Device Details" at the bottom of the screen, view the information to the right of "Storage Array Type Policy"
Determining the total inventory in a datacenter	From "Hosts and Clusters" view, click on the datastore that you want to examine, click on the "Summary" tab, read the totals just to the right of the Inventory Pane

Configuration Task	Directions
Determining the VM Working Location of a VMs storage	From "Hosts and Clusters" view, right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "General Options" in the blue area, locate "VM Working Location", read the location to the right
Determining total resource use in a datacenter	In "Hosts and Clusters" view, click on the datacenter that you want to examine, click on the "Summary" tab, read the totals just to the left of Recent Tasks
Disabling Admission Control on a vSphere cluster	From "Hosts and Clusters" view, click on the cluster that you want to configure, click on the "Manage" tab and then on the "Settings" tab, in the blue area select vSphere HA, in the details pane on the right select "Edit", in the "Edit Cluster Settings" dialog box uncheck the box labeled "Enable Admission Control"
Disabling HA on a vSphere cluster	From "Hosts and Clusters" view, click on the cluster that you want to configure, click on the "Manage" tab and then on the "Settings" tab, in the blue area select "vSphere HA", in the details pane on the right, click "Edit", in the "Edit Cluster Settings" dialog box uncheck the box labeled "Enable Host Monitoring"
Disconnecting a Network Adapter on a VM	Right-click on the VM that you want to configure, click "Edit Settings", on the "Virtual Hardware" tab click on the Network Adapter in the blue area, uncheck "Connect at Power On"
Editing an alarm in vCenter	From "Hosts and Clusters view, click on the vCenter (root object), click on "Manage" and then on "Alarm Definitions", click on an alarm to read information about it on the right, click on "Edit" to make changes to the current settings
Editing connection Timeout settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "Timeout settings" in the blue area, configure accordingly
Editing Database settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then "Settings" tab, on the "General" settings click on "Edit", click "Timeout settings" in the blue area, configure accordingly
Editing default http and https ports in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "Ports" in the blue area, configure accordingly
Editing Graphics properties for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab and then on the "Settings" tab, expand "Hardware" in the blue area, click on "Graphics", click on the adapter card and then select the VMs that you want to use it
Editing Logging settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "Timeout settings" in the blue area, configure accordingly

Configuration Task	Directions
Editing Mail settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "Mail" in the blue area, configure accordingly
Editing Memory properties for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Hardware" in the blue area, click on "Memory", click "Edit" in the details pane to the right of "Memory" and configure the settings as needed
Editing Multipathing policies for LUNs	From "Hosts and Clusters" view, click on the host that is associated with the datastore that contains the LUN you want to examine, click on the "Manage" tab and then on the "Storage" tab, in the blue area select "Storage Devices", select the LUN that you want to edit and then scroll to the bottom of the list under "Device Details" at the bottom of the screen, click "Edit Multipathing..." to the right of "Multipathing Policies", click on the drop-down to select your new PSP and select a preferred path if applicable
Editing Processor properties for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "Hardware" in the blue area, click on "Processors", click "Edit" in the details pane to the right of "General", configure the settings as needed
Editing Runtime settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "Runtime settings" in the blue area, configure accordingly
Editing SNMP receiver settings in vCenter	On "Hosts and Clusters" click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "SNMP receivers" in the blue area, configure accordingly
Editing SSL settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click "Edit", click "Timeout settings" in the blue area, configure accordingly
Editing statistics collection intervals for a vCenter	From "Hosts and Clusters" view, click on a vCenter in inventory pane on the left, click on the "Manage" tab and then on the "Settings" tab, click on "General" in the blue area, expand "Statistics" to the right of "General" in the blue area to view your current settings, click "Edit" and click "Statistics" to configure your collection statistics as needed
Editing the Default Gateway of a host	From "Hosts and Clusters" view, click on the host on which you want to edit the default gateway, click on the "Manage" tab and then on the "Networking" tab, click "Virtual adapters" in the blue area, click the "TCP/IP Configuration", click the System Stack that you want to edit (usually the Default stack), click the Routing tab at the bottom of the screen to view the current settings, click the "Edit" icon that looks like a pencil at the top right of screen, click Routing in blue area, edit the default gateway as needed (this may cause the host to become disconnected from the network)

Configuration Task	Directions
Editing the DNS server settings on a host	From "Hosts and Clusters" view, click on the host on which you want to edit the DNS settings, click on the "Manage" tab and then on the "Networking" tab, click "Virtual adapters" in the blue area, click the "TCP/IP Configuration", click the System Stack that you want to edit (usually the Default stack), click the DNS tab at the bottom of the screen to view the current settings, click the "Edit" icon that looks like a pencil at the top right of screen, click DNS configuration in blue area, configure to obtain settings automatically from DHCP server on a specific adapter, or configure manually as needed
Editing User Directory settings in vCenter	From "Hosts and Clusters" view, click your vCenter root object, click the "Manage" tab and then the "Settings" tab, on the "General" settings click on "Edit", click "User Directory" in the blue area, configure accordingly
Enabling Health Check on a vSphere Distributed Switch	From "Networking" view right-click on the VDS on which you want to enable Health Check, select "All vCenter Actions" at the bottom of the list, click "Edit Health Check...", enable Health Check for VLAN and MTU and/or Teaming and failover
Enabling Network I/O Control on a VDS	In "Networking" view, right-click on the VDS on which you want to configure NIOC, click "Edit Settings", in the drop-down box next to "Network I/O Control" select "Enabled", click OK to save your changes
Enabling Storage I/O Control for datastores	In "Storage" view, select the datastore for which you want to enable SIOC, click the "Manage" tab and then click the "Settings" tab, in the details pane click "Edit" across from "Datastore Capabilities", check the box labeled "Enable Storage I/O Control" and set your "Congestion Threshold" as needed
Enabling VM Storage Policies in a vCenter	From the "Home" screen, click on the "VM Storage Policies" icon in the "Monitoring" section of the details pane, click on the second icon under "Objects" with the pop-up that reads "Enable VM storage policies per compute resource.", select the vCenter and enable policies for the hosts and clusters as needed
Enabling/Disabling Ipv6 Support for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Networking" tab, click on "Advanced" in the blue area on the left, click on "Edit" to the right of "Advanced", configure as needed
Estimating datastore space for a vCenter Server	From "Hosts and Clusters" view, click your vCenter root object, on the "General" settings click on "Edit", click "Statistics" in the blue area, configure for your hosts, clusters, and collection intervals accordingly
Exporting a vSphere Distributed Switch configuration	From "Networking" view, right-click on the VDS for which you want to save the configuration, select "All vCenter Actions" at the bottom of the list, click "Export Configuration...", select the appropriate radio button to export either "Distributed switch and all port groups" or "Distributed switch only", provide a description if desired (not required), click "OK", click "Yes" to confirm that you want to save the configuration, give the saved configuration a name and storage location, click "Save" to finalize the export process

Configuration Task	Directions
Migrating a powered on VM that is on a private datastore	From "Hosts and Clusters" view, expand your inventory to locate the powered on VM that you want to migrate, right-click on the VM, select "Migrate", in the "Select Migration Type" setting select to "Change datastore", select the destination datastore for the VM, follow the wizard to make your selections and verify compatibility
Migrating a VM with vMotion	From "Hosts and Clusters" view, expand your inventory to locate the powered on VM that you want to migrate, right-click on the VM, select "Migrate", in the "Select Migration Type" setting select to "Change both host and datastore", follow the wizard to make your selections and verify compatibility
Modifying the multipathing properties of a datastore	From "Datastore and Datastore Clusters" view, click on the datastore on which you want to modify multipathing, click on the "Manage" tab, and then on the "Settings" tab, in the blue area select "Connectivity and Multipathing", click on the host associated with the datastore, click on "Edit Multipathing..." at the bottom of screen
Quick determination of CPU and Memory for all VMs on a vCenter	In "Hosts and Clusters" view, click on the vCenter object that you want to examine, click on the "Related Objects" tab and then on the "Virtual Machines" tab, compare CPU and memory use for all VMs and sort as needed
Quick view of Triggered Alarms in vCenter	From "Hosts and Clusters" view, examine the "Alarms" section at the bottom right corner of screen, use the links from there for further examination and configuration
Removing a distributed switch port group	From "Networking" view, click on the switch the contains the port group that you want to remove, click on the "Manage" tab and then on the "Settings" tab, click on "Topology" in the blue area (if needed), click on the port group that you want to remove as shown in the topology of the switch, click the red "X", confirm by clicking "Yes"
Removing a host from a vSphere Distributed Switch	From "Networking" view, right-click on the VDS on which you want to remove a host, click "Add and Manage Hosts...", select "Remove hosts", click "Next", click the "+" select from the list of attached hosts, follow the wizard to finish the removal process
Removing a Port Group from a vNetwork Standard Switch	From "Hosts and Clusters" view, click on the host on which you want to remove the port group, click on the "Manage" tab and then on the "Networking" tab, click "Virtual switches in the blue area, click on the switch on which you want to remove the port group, click on the port group as shown on the switch below, click on the red "X" and confirm that you want to remove the port group (you should assure that all VMs that were connected to the port group are reassigned and reconnected to another port group
Removing a Tag from an inventory object	Right-click on the object on which you want to remove a tag and click "Remove Tag", choose the appropriate tag from the list on the pop-up, click "Remove"

Configuration Task	Directions
Removing a VM from the vCenter inventory	From "Hosts and Clusters" view, right-click on the powered off VM that you want to remove, select "All vCenter Actions" from the bottom of the list, click on "Remove from Inventory", confirm the remove by clicking on "Yes"
Removing a VMFS datastore	From "Datastore and Datastore Clusters" view, right-click on the datastore that you want to remove, select "All vCenter Actions", click "Delete Datastore", confirm your intent to delete the datastore by clicking "Yes"
Removing a vSphere Distributed Switch	From "Networking" view, right-click on the VDS that you want to remove, click on "All vCenter Actions" at the bottom of the list, click on "Remove from Inventory", confirm that you want to remove the VDS and all port groups associated with it by clicking on "Yes"
Removing an expired license key	From "Home", click on the "Licensing" icon in the "Administration" section of the details pane, on the drop down box next to "vCenter Server" choose the vCenter server that you want to manage, click on either "License Keys", right-click on the key that you want to remove, click "Remove License Key", confirm your selection
Removing the Getting Started tabs (Taking off the "training wheels")	From "Home", click "Help" in the upper right corner, then click "Hide All Getting Started Pages"
Renaming a VMFS datastore	From "Datastore and Datastore Clusters" view, right-click on the datastore that you want to rename and select "Rename", enter the new name and click "OK"
Rescanning storage for a host	From "Hosts and Clusters" view right-click on the host on which you want to rescan storage, select "All vCenter Actions, click on "Rescan Storage...", select to "Scan for new Storage Devices", "Scan for new VMFS Volumes", or both, click "OK"
Rescanning storage for an entire cluster	From "Hosts and Clusters" view, right-click on the cluster on which you want to rescan storage, select "All vCenter Actions, click on "Rescan Storage...", select to "Scan for new Storage Devices", "Scan for new VMFS Volumes", or both, click "OK"
Restoring an exported vSphere Distributed Switch configuration	From "Networking" view, right-click on the VDS for which you want to restore the configuration, select "All vCenter Actions" at the bottom of the list, click "Restore Configuration...", browse to the location of a stored file, click on the file and then click "Open", select the appropriate radio button to export either "Distributed switch and all port groups" or "Distributed switch only" and click "Next", review your Import settings and click "Finish" to begin the restore process
Restoring the Getting Started tabs (Putting the "training wheels" back on	From "Home", click "Help" in the upper right corner, then click "Show All Getting Started Pages"
Resuming a Work in Progress	Click on the item in "Work In Progress"
Saving Work In Progress	In any wizard, click the double arrow ">>" at the top right corner of the wizard dialog box

Configuration Task	Directions
Scheduling a task for a cluster	From "Hosts and Clusters" view, click on the cluster, click on the "Manage" tab, click on the "Scheduled Tasks" tab below it and to the right, click on "Schedule a New Task" and make your choices in the wizard
Showing other unconfigurable devices	Right-click on the VM that you want to examine click "Edit Settings", on the "Virtual Hardware" tab click on "Other Devices" in the blue area, view your settings
Synchronizing a VMs guest time with its host	Right-click on the VM that you want to configure, click "Edit Settings", on the "VM Options" tab, click "VMware Tools" in the blue area, locate "Time" and click the check box next to "Synchronize guest time with host"
Troubleshooting triggered alarms for a datacenter	From "Hosts and Clusters" view, click on the datacenter that you want to troubleshoot, click on the "Monitor" tab, read the information on "All Issues", click on "Triggered Alarms" to investigate further
Upgrading a VMFS-3 datastore to VMFS-5	From "Datastore and Datastore Clusters" view, click on the datastore, click on the "Manage" tab, and then on the "Settings" tab, ensure that "General" is selected in the blue area, click the "Upgrade to VMFS-5" button, verify that all hosts are running at least ESXi 5.0 and click "OK"
Viewing Alarm Definitions for a vCenter	From "Hosts and Clusters" view, click on the vCenter object, click on the "Manage" tab, click on the "Alarm Definitions" tab next to the "Settings" tab
Viewing Alarm Settings in vCenter	From "Hosts and Clusters view, click on the vCenter (root object), click on "Manage" and then on "Alarm Definitions", click on the specific alarm to read information about it on the right
Viewing All Triggered Alarms in vCenter	From "Hosts and Clusters" view, click on the vCenter (root object), click on the "Monitor" tab and then on the "Issues" tab, in the blue area under "Issues", click on "Triggered Alarms", uncheck "Show acknowledged" to no longer view alarms which have been acknowledged by an administrator but not yet cleared
Viewing Client Plug-Ins	From "Home", click "Administration", under "Solutions" click "Client Plug-Ins"
Viewing configured alarms for vCenter	On "Hosts and Clusters", click your vCenter root object, click the "Manage" tab and then the "Alarm Definitions" tab, click on the "Name" column to view the alarms in alphabetical order, view detailed information about each alarm to the right of the list of alarms
Viewing current licensing for a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Settings" tab, expand "System" in the blue area, click on "Licensing"
Viewing extensions added to a vCenter	From "Home", select "Administration", expand "Solutions" in the blue area below, select "vCenter Server Extensions"
Viewing Host Cache Configuration	From "Hosts and Clusters" view, click on the host, click the "Manage" tab, click the "Storage" tab below the "Manage" tab, In the blue area select "Host Cache Configuration"

Configuration Task	Directions
Viewing licensed products in vSphere	From "Home", click on the "Licensing" icon in the "Administration" section of the details pane, on the drop down box next to "vCenter Server" choose the vCenter server that you want to manage, click on the "Products" tab, double click a specific product license to get more information
Viewing the devices connected to a storage adapter	From "Hosts and Clusters" view, click on the host that is associated with the storage adapter, click the "Manage" tab, click the "Storage" tab below the "Manage" tab, in the blue area select "Storage Adapters" and then select the adapter that you want to examine, click "Devices" tab in "Adapter Details" at the bottom of the screen
Viewing the paths visible to a storage adapter	From "Hosts and Clusters" view, click on the host that is associated with the storage adapter, click the "Manage" tab, click the "Storage" tab below the "Manage" tab, in the blue area select "Storage Adapters" and then select the adapter that you want to examine, click "Paths" tab in "Adapter Details" at the bottom of the screen
Viewing the paths visible to a storage device	From "Hosts and Clusters" view, click on the host that is associated with the storage device, click the "Manage" tab, click the "Storage" tab below the "Manage" tab, In the blue area select "Storage Devices" and then select the device that you want to examine, click the "Paths" tab in "Adapter Details" at the bottom of the screen
Viewing the properties of a storage adapter	From "Hosts and Clusters" view, click on the host that is associated with the storage adapter, click the "Manage" tab, click the "Storage" tab below the "Manage" tab, In the blue area select "Storage Adapters" and then select the adapter that you want to examine, click "Properties" tab in "Adapter Details" at the bottom of the screen
Viewing the properties of a storage device	From "Hosts and Clusters" view, click on the host that is associated with the storage device, click the "Manage" tab, click the "Storage" tab below the "Manage" tab, In the blue area select "Storage Devices" and then select the device that you want to examine, click the "Properties" tab in "Adapter Details" at the bottom of the screen
Viewing the properties of physical adapters (vmnics) on a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Networking" tab, click on "Physical adapters" in the blue area on the left, click on the vmnic that you want to see in the list on the right, view the properties below
Viewing the properties of virtual switches on or associated to a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Networking" tab, click on "Virtual Switches" in the blue area on the left, click on the switch that you want to see in the list on the right, view the properties below
Viewing the properties of VMkernel adapters on or associated to a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Networking" tab, click on "VMkernel adapters" in the blue area on the left, click on the VMkernel that you want to see in the list on the right, view the properties below

Configuration Task	Directions
Viewing the TCP/IP configuration of a host	From "Hosts and Clusters" view, click on the host, click on the "Manage" tab, and then on the "Networking" tab, click on "TCP/IP Configuration" in the blue area on the left, click on the system stack that you want to view, view the properties of the TCP/IP stack below
Viewing vCenter Server Extensions	From "Home", click "Administration", under "Solutions" click "vCenter Server Extensions"

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About the Author

Bill Ferguson, VCI3, 4, 5, MCT, MCSE, MCP+I, CCSI, CCNA, A+, Network+, Server+, Security+ has been in the computer industry for over 20 years. Bill runs his own company as an independent contractor in Birmingham, Alabama, teaching classes for many national training companies, including Global Knowledge. Additionally, Bill has written and produced many technical training videos including: A+, Network+, Windows 2000 Management, Windows XP Management, Windows 2000 Security, Server+, and Interconnecting Cisco Network Devices. He also wrote the *70-298 Exam Cram 2 (Designing Security for a Windows Server 2003 Network)* for Que Publishing. In addition, he wrote the *Microsoft Certified Desktop Support Technician (MCDST) Study Guide* for Sybex Inc. and several Network+ titles. Most recently, he wrote *The Official VCP5 Certification Guide* (Pearson/VMware Press).

Bill says, "My job is to understand the material so well that I can make it easier for my students to learn than it was for me to learn; whether I'm teaching in person, online, or in print."