

NetBackup 7.6 Feature Briefing Legal Search and Hold enhancements

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This document describes a feature introduced in NetBackup 7.6 and available in this and higher releases.

If you have any feedback or questions about this document please email them to IMG-TPM-Requests@symantec.com stating the document title.

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Feature Description

Search and Hold was introduced in NetBackup/OpsCenter 7.5 to assist customers with the ability to place legal holds on images within NetBackup that have been previously backed up. NetBackup expires images based on a time value that is set when the Schedule is created (retention policy). After it is set, and a backup is run, it is very difficult to change the retention especially for large numbers of images.

Search and Hold provides a means to place a Hold on images to prevent expiration within NetBackup. Additional information about the initial release of Search and Hold can be found in the NetBackup 7.5 Feature Briefings on SymIQ .

In NetBackup 7.6, Search and Hold has been enhanced to include a number of new options that should benefit the customers who are currently using Legal Search and Hold - or are considering it.

The new features include:

- Stand-alone Indexing Server
 - Legal Search and Hold in 7.5 required a Media Server license on the Indexing server
 - The requirement for 7.6 has been reduced to a NetBackup client on the Indexing server
- Image hold without indexing based on filters such as date range, policy type etc.
 - Legal Search and Hold in 7.5 could not hold an image until the Indexing had been run – which could be a time consuming process
- Mass restore
 - If images need to be restored in 7.5 they would need to be found using OpsCenter Operational Restore and recovered.
 - This is a command line process however it is well documented

Note: The Indexing Server for 7.6 is only supported on Windows 2008 R2 or Windows 2012 64 bit servers. While it is possible to run the Indexing Server on a virtual machine it is not recommended due to performance of the Velocity database.

Business Value

The most important feature of Legal Search and Hold in NBU 7.6 is the Stand-alone Index Server. This option will cost the customer less to create the Indexing server since they no longer require a Media Server license on the machine that is doing the Indexing. While the customer will still require dedicated

hardware to run the Indexing server, this will be a hardware cost vs. hardware and software cost. This improves ROI when doing Legal Search and Hold. Note that the Index Server still requires a NetBackup Client be installed on the server to provide needed binaries.

The other enhancements to Legal Search and Hold will make it much faster for customers to create holds of important data without waiting for the time it takes to build an index. This can speed up the process of holding data by a large factor.

The Mass Restore enhancement still requires Command Line to execute however there is very good documentation on the feature.

Underlying Principles

In the existing Legal Search and Hold model, a Media Server was required as the Indexing Server which meant an additional media server license was required. If this server was actually being used as a data mover, there would be a fairly large performance impact on the system itself during backup and indexing. In addition, there was no defined DR solution if the indexing server were to crash - especially if there were indexing jobs that had not run. Migration to a new server was a complex procedure which required a re-indexing of the data. Finally, decommissioning the indexing server was a tedious process.

In 7.6, these use cases have been taken into consideration. An existing index server can be easily upgraded, decommissioning of the server is also much easier and the existing index server can be easily migrated to new hardware. A DR solution has also been provided. This was all made possible by removing the dependency on the Media Server code.

All in all the new features and enhancements will reduce operating costs, improve usability and migration of the server if needed and make DR much easier.

Test Drive

Only the “new” features of Search and Hold are covered in this Feature Briefing. For installation and configuration steps, please refer to the **NetBackup 7.5 Feature Briefing – NetBackup Search and Hold** from the 7.5 release.

If a customer is new to Legal Search and Hold, the initial configuration is done similar to the installation of NetBackup and OpsCenter with a DVD install.

Properties

Under the covers of Legal Search and Hold a number of things have happened.

1. A new server role has been added for NetBackup
2. A new machine type has been added to EMM which has created a bp.conf entry of "INDEX_SERVER"
3. Changes to CORBA and the socket infrastructure to allow for communication to the new Index Server from the existing NetBackup servers
4. New properties in Host Properties in the NBU Admin GUI's
5. NetBackup CLI support for the Index server role "nbemcmd"
6. NBAC support for Index Server role "bpbaz -SetupIndexServer"

When creating an Index Server (after the software has been installed) there are a number of new options in the configuration area as noted in Figure 1.

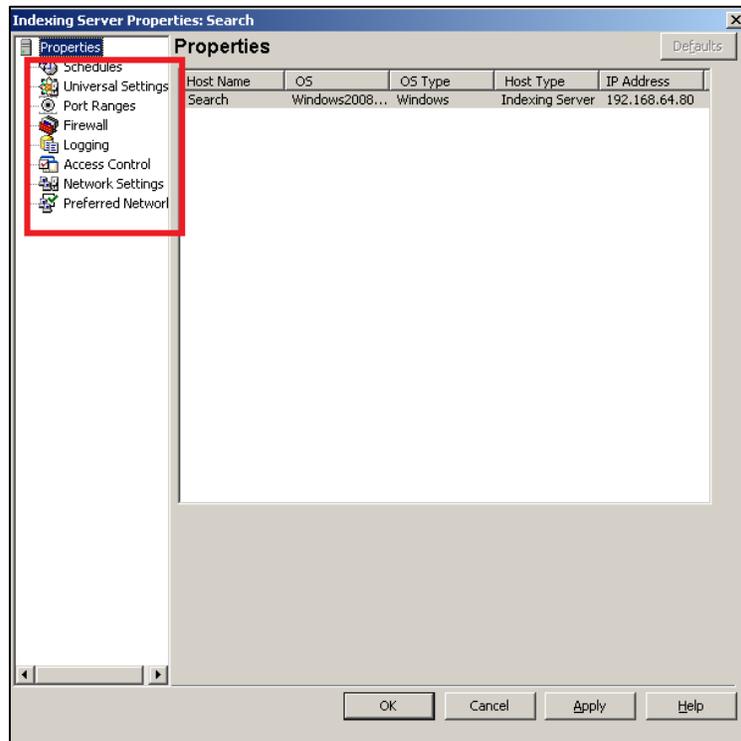


Figure 1 - New Properties Options

Configuration

Configuration of the standalone Indexing server is as simple as installing the software from the NetBackup 7.6 DVD's on a supported operating system and server. Upgrades can also be done on an existing Indexing server. Setup is done via a Wizard which is exactly the same as the 7.5 Wizard therefore it is not covered in this Feature Briefing.

Since a NetBackup Client is required on the Index Server, the user will be prompted if the Client has not already been installed. If there is no Client installed on the new Indexing Server, it will be installed first (see Figure 2).

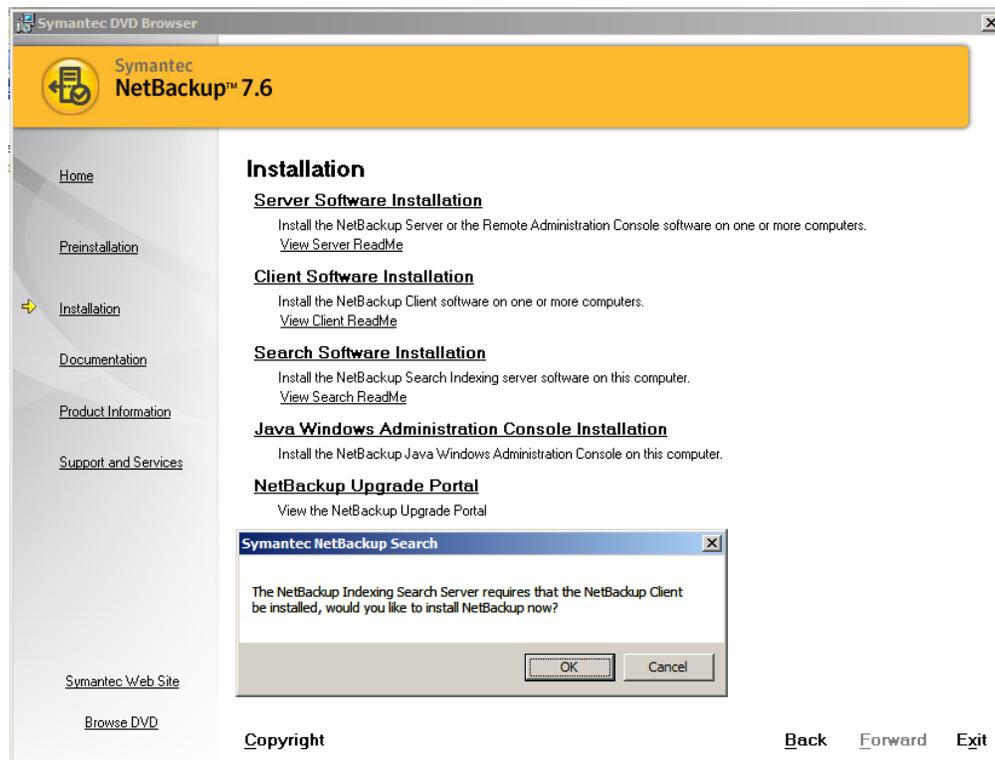


Figure 2 - Client Install

Once the Client has been installed, the Search/Indexing software will install automatically if the checkbox is checked (see Figure 3).

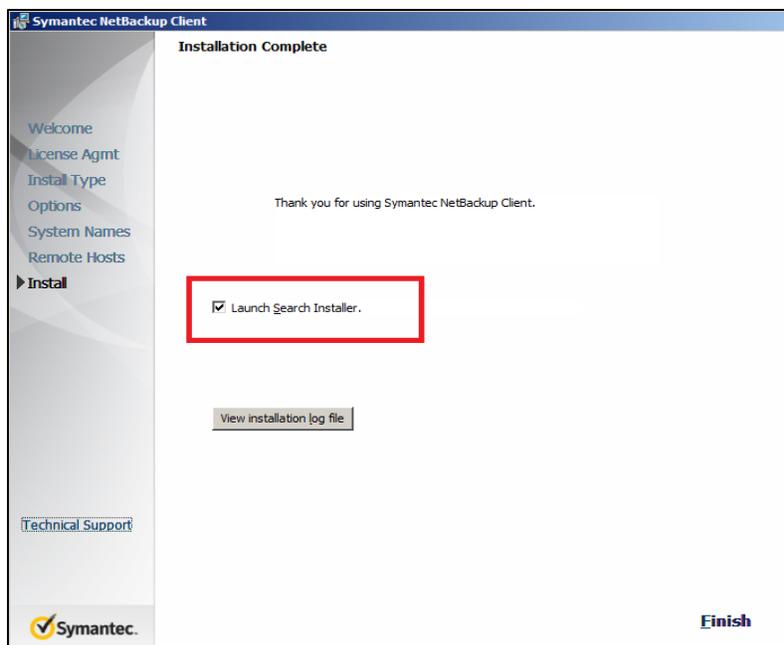


Figure 3 – Automatic Install

If a previous version of Search is found, an upgrade will be started. The installation is simple, and the configuration within the NetBackup Admin GUI to get Indexing running is the same as it was in 7.5.

Holding without Indexing

Creating a Hold without running Indexing is done using the OpsCenter Interface. Holds of Images can be created using a number of criteria such as:

- Search by date range for images
- Search for Files and Folders

Holding of the images is exactly the same as in 7.5 – Images are found and then held. The ability to perform this step requires an OpsCenter instance. This functionality is not available in the NetBackup GUI.

Mass Restore of Images

Mass Restore is accomplished using the Command Line. Once the information that needs to be restored is determined there are a number of command line options that need to be run. Going into detail for this process is beyond the scope of this document. The information is documented in the manuals and other tech notes.

The command to restore is a new binary called “**nbholdrestore**” and includes a number of switch modifiers to obtain and restore the information.

Index Server Disaster Recovery

In the previous version of Search and Hold, recovery from a crash consisted of:

1. Finding the backup of the data
2. Restore it
3. Use the manual steps documented in the manual to sync the Master to determine which data was missing.

In 7.6, to better protect the Index Server in the event of a system failure the following solution was added:

1. Identify the last time an indexing backup was run
2. Run the command:

```
nbindexutil -reindex - indexed_after <mm/dd/yyyy [HH:MM:SS]>
```

This will automatically create the indexing information thus reducing the number of manual steps needed from 7.5.

Licensing and support considerations

Licensing of Search and Hold is a separately licensed feature that is not included in the OpsCenter Analytics license. However it is included in Capacity licensing.

Related documents

[NetBackup Legal Search and Hold Administrator's Guide](#)

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