Best Practices for Backing Up the Clearwell eDiscovery Platform

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How To for Clearwell eDiscovery Platform

This article will cover a number of different aspects for backing up the Clearwell environment.

Here are the different sections this article will go over:

- [Common Backup Best Practices](#)

- [Developing a Backup Routine](#)

- [Creating Collections Backups](#)

The following tips represent common best practices when performing back ups of both cases and appliance.

Backup Frequency

On-demand Case Backups

- On-demand case backups are typically performed after initial the case processing has completed and before end-user work begins (review and analysis stage).

- On-demand case backups can be used prior to processing additional batches to act as a roll back point. Since Clearwell does not allow data that has been processed into a case to be deleted or removed, on-demand case backups can be used strategically to provide a way to back out of problematic processing runs.

Scheduled Case Backups
Based on checkpoint requirements, case-level backups are often scheduled to run nightly with a rolling 7-day case backup history.

Scheduled, Appliance Backups
Depending on recovery practices an appliance-level backup is often scheduled to run weekly during an off-hour weekend backup window.

Important: Please make sure that users are aware of the backup schedule start time. Overlap of case processing runs with backups and vice versa, can cause interference and delays in both backups and processing, as files can become locked and or unavailable, and data processing slowed due to resources being allocated to the backup process.

Backup Location

The case and system files should be backed up periodically on an external device for disaster recovery in the event of an appliance failure.

- The backup destination for case- and appliance-level backups should be changed to a network-based directory off of the Clearwell appliance.

- If the backup destinations are not changed, it is suggested to schedule a script to copy any local backups off of the Clearwell appliance to a network-based directory (This script is not provided by Symantec).

Note: Symantec strongly recommends a high bandwidth, low latency network connection between the Clearwell appliance and the destination backup network directory.

Cautionary Practices

- Using Third-party backup software packages

Third-party backup software is often unable to back up the MySQL database and other locked files while Clearwell services are running.

Note: Do not attempt to back up cases manually by copying the case data store folders on the appliance. Case information is stored in multiple locations.

Developing a Backup Routine

Implement a range of different backup strategies based on end-user requirements for check-pointing and sensitivity to recover in the event of a failure. The following scenarios describe how the (intensity of use) could impact the backup routine. These examples are on opposite ends of the spectrum. The environment in question will most likely fall between these cases.

Scenario: Clearwell server is in constant use.

- Case administrators and reviewers work late into the night

- There are several large active cases

- Processing jobs run most weekends while users are offline

Recommendation: Schedule case backups nightly and appliance backups for every weekend.

Reason: If cases are being used during off-peak business hours or cases are very large, nightly case backups are likely to fail. Case backups automatically fail if a user is logged into the case: if

users work on case files after business hours, the case backup will not run. If cases are large, the nightly backup might not complete by the time users are ready to start reviewing again. In this situation, the backup is likely to be cancelled so the work can continue. Repeated cancellations of case backups can put your work product at risk by not having an up-to-date backup. To address this, run an appliance backup over each weekend. Appliance backups ensure both work product and appliance are backed up. The downside is that appliance backups shut down the system and can interfere with other tasks that are likely to be scheduled for non-working hours.

Summary: If case backups fail every night, use an appliance backup every weekend. Schedule a maintenance window to ensure processing jobs do not interfere with the appliance backup.

Scenario: Clearwell server has no off-hour traffic and cases are not too large.

Recommendation: Schedule case backups every day and appliance backups monthly or as needed

Reason: If cases and system backup regularly, it is possible to restore cases without the need of an appliance backup. Appliance backups provide more system data than a system backup, however, appliance backups can be performed on a less rigorous schedule.

The Benefit: Weekend processing time (when users are not online and accessing cases) can be used to process, create productions, and perform other tasks which require users to be offline.

Creating Collections Backups

This section describes setting the location for collection backups and how to run a backup of data map and collections.

Running an On-Demand Collections Backup
On-demand backups are a convenient way to save collected data should the data become unusable or source data unavailable. Running a collections backup will also backup any legal holds. It is typical to perform an on-demand collections backup after collected new data and before the case management workflow begins.

To backup a collection on demand

Note: Before beginning, please verify that no one is currently accessing the collection.

To backup a collection, the user must have the Collections Admin role with collection management permissions.

1. From the System view, click Backups.
2. Click the Data Map and Collections Backups tab. The Backups page displays showing any backups previously performed.
3. Click Start New Backup...

4. Provide a backup name. Best Practice: Only use alphanumeric characters in backup names.
5. Select the option to perform a system backup on completion.
6. Click Start Backup. The backup begins.

The duration of a collections backup depends on the size of the collection and the backup location.

Next Steps:

- To stop the backup, click Pickup at the top of the page, and click Stop.

- To verify that the backup was successful, go to System > Jobs. Successful jobs are automatically pruned from the jobs list. If you do not see the backup in the Jobs pane and it has completed running, it was successful.

Scheduled Collections Backups

- Scheduled collections backups help maintain a set of up-to-date backups on all collected data.

- Each scheduled collection backup overwrites the most recent backup with the same backup name.

- If multiple copies of a collection backup need to be preserved, schedule a backup to occur on each day of the week.

  Note: If several weekly backups are scheduled and the plan is to have a full, appliance backup over the weekend, consider skipping a case backup on Saturday and Sundays since they may be redundant to other backup types.

  ### To schedule a collection backup

Note: Before beginning to backup a collection, the user must have the Collection Admin role with collection management permissions.

1. From the System view, click Schedules. The Schedule pane displays with a list of current schedules.
2. At the bottom of the Schedule pane, click Add. The Add Schedule page displays.
3. From the Task Type menu, select Backup.
4. Set the Initial Run Date, Start Time.
5. Choose whether the backup should be run daily or weekly.

Note: Remember that scheduled collection backups overwrite the most recent backup with the

same backup name.

6. Select Enabled to run the scheduled backup at the next scheduled time.
7. If there are existing cases to back up at the time of the collection data backup,choose either all, or selected cases to backup.

Note: If the collection backup name is changed after setting up a backup schedule, the new name is automatically added to the schedule, and the collection continues to be backed up. Backups made with the old name are not deleted.

8. If you also want to back up the system at the same time, select System backup.
9. Select Collections, Data Map backup.
10. Provide a name for the collection backup.

Best Practice: Only use alphanumeric characters in backup names.

Note: The Clearwell system will not be available during a system backup. Clearwell delays user-performed operations that impact the system until the backup completes, if the collections backup includes a system backup. System backups typically run between 1-5 minutes.
11. Click Save. The new collection backup displays in the Schedule pane.

Next Steps:

- To view when the backup ran, go to System > Schedules. The Last Run column lists the most recent time that the backup ran.

- To verify that the backup was successful, go to System > Jobs. Successful jobs are automatically pruned from the jobs list. If the backup is not in the Jobs pane and it has completed running, it was successful.

To view the collection backup schedule

- View all scheduled tasks, including backups, from System > Schedules. The Schedule pane describes when the task is scheduled to run, when it was last run, and whether the task is enabled.

Related Articles

- [DOC6650 Symantec Clearwell eDiscovery Platform v7.1.3 - System Administration Guide](#)

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