

LOKKBOX

DOCUMENTATION SETTING UP A RETENTION POLICY TO MIRROR A TRADITIONAL TAPE ROTATION

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1 Overview of advanced retention policies in LokkBox OBM

The Advanced retention policy feature of LokkBox Online Backup Manager (OBM) allows you to configure a flexible retention policy. It allows you to keep a set of snapshots of all backup files based on the time of the backup Jobs. For example, you can configure the advanced retention policy to keep the following sets of backup files to mimic the retention policy of the old days when you were still doing tape rotations:

- All files available within the last 7 days
- All files available on the last 4 Saturdays (or any day of the week that you choose) within the last 28 days
- All files available on the 1st day of each month within the last 14 months
- All files available on the 1st day of each quarter within the last 2 years
- All files available on the 1st day of each year within the last 7 years

To do so, you need to setup your advanced retention policy as follows:

- Type = Daily; Number of copy to keep = 7
- Type = Weekly; Frequency = Saturday; Number of copy to keep = 4
- Type = Monthly; Frequency = Day 1; Number of copy to keep = 14
- Type = Quarterly; Frequency = Day 1 of Jan, Apr, Jul, Oct; Number of copy to keep = 8
- Type = Yearly; Frequency = Date 01-01; Number of copy to keep = 7

Assuming today is 17-Jan-2009, if [Remove retention files for overlap policy] is NOT enabled, the following snapshots (provided you have run backups daily for more than 7 years) will be kept on the server accordingly, i.e.:


Daily	Weekly	Monthly	Quarterly	Yearly
16-Jan-2009	14-Jan-2009	01-Jan-2009	01-Jan-2009	01-Jan-2009
15-Jan-2009	07-Jan-2009	01-Dec-2008	01-Oct-2008	01-Jan-2008
14-Jan-2009	31-Dec-2008	01-Nov-2008	01-Jul-2008	01-Jan-2007
13-Jan-2009	24-Dec-2008	01-Oct-2008	01-Apr-2008	01-Jan-2006
12-Jan-2009		01-Sep-2008	01-Jan-2007	01-Jan-2005
11-Jan-2009		01-Aug-2008	01-Oct-2007	01-Jan-2004
10-Jan-2009		01-Jul-2008	01-Jul-2007	01-Jan-2003
		01-Jun-2008	01-Apr-2007	
		01-May-2008		
		01-Apr-2008		
		01-Mar-2008		
		01-Feb-2008		
		01-Jan-2007		
		01-Dec-2007		

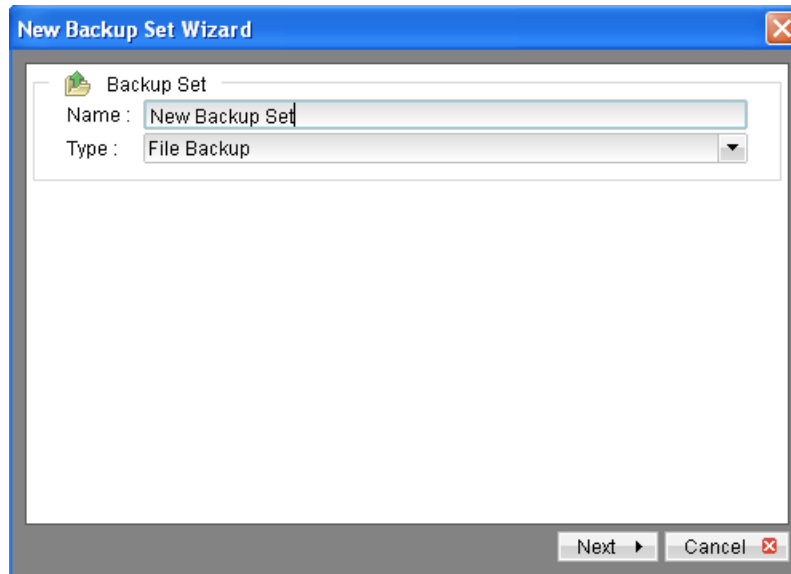
If [Remove retention files for overlap policy] is enabled, the weekly policy overrides the daily policy so the snapshots of 10-Jan-2009, 11-Jan-2009, 12-Jan-2009, 13-Jan-2009 and 14-Jan-2009 are removed. The monthly policy overrides the weekly policy so the snapshots of 24-Dec-2008 and 31-Dec-2008 are removed. The same applies to the monthly, quarterly and yearly policy.

2 Walkthrough – setting up a basic file backup job

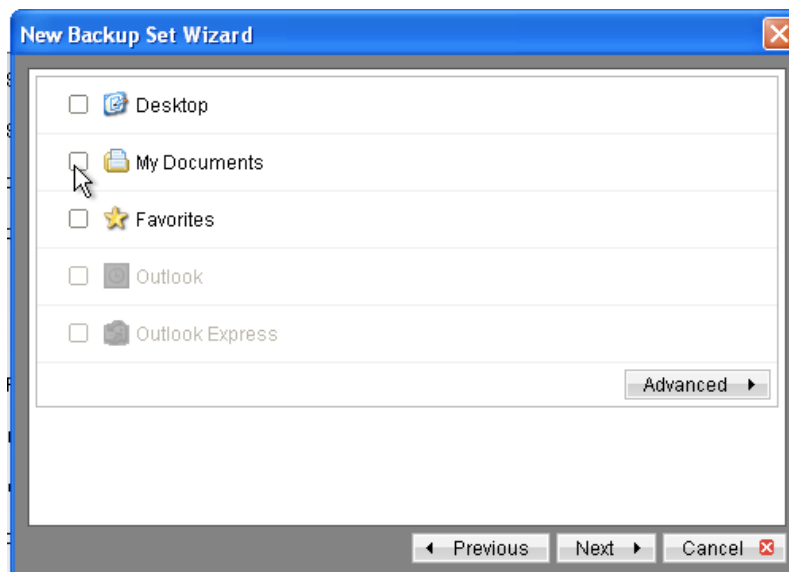
Open Lokkbox OBM.

To start setting up backup sets, click the  button to open the [Backup Setting] dialog.

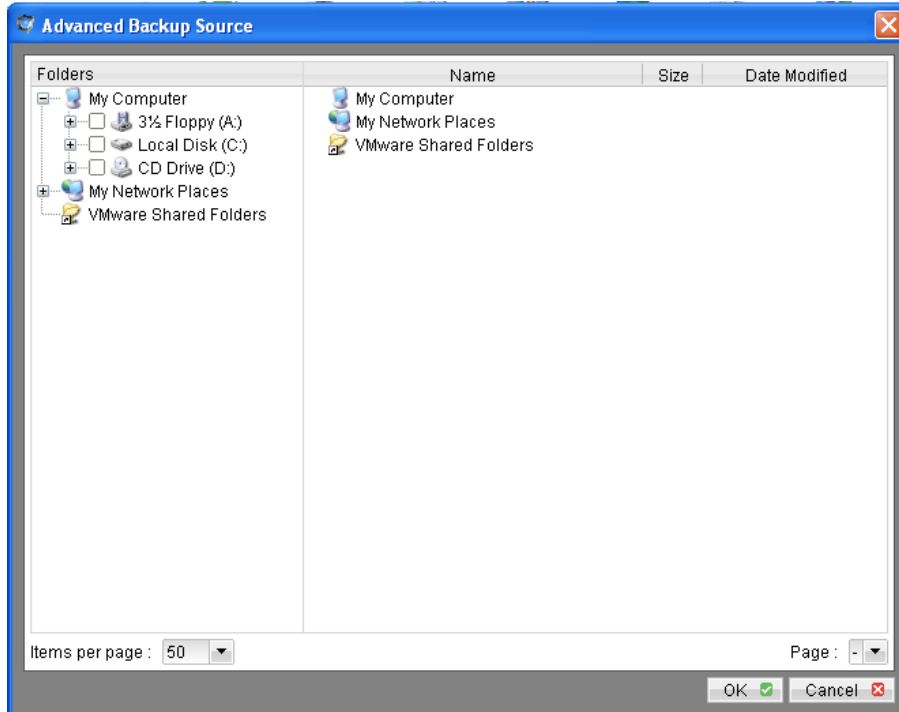
On the left panel, press the  button to create a new backup set.
Enter a name for your backup set.



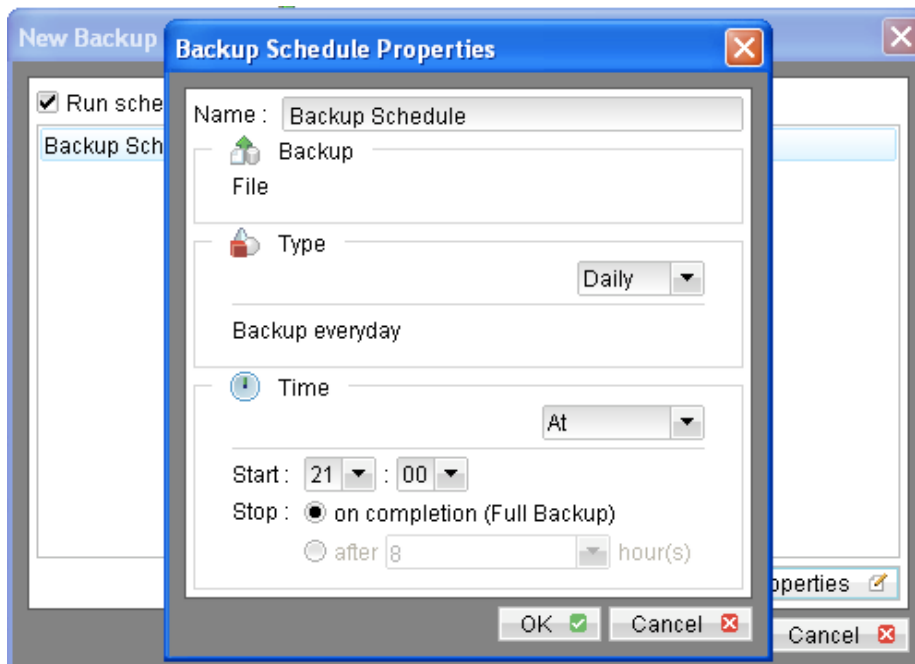
Select the files/directories you want to backup.



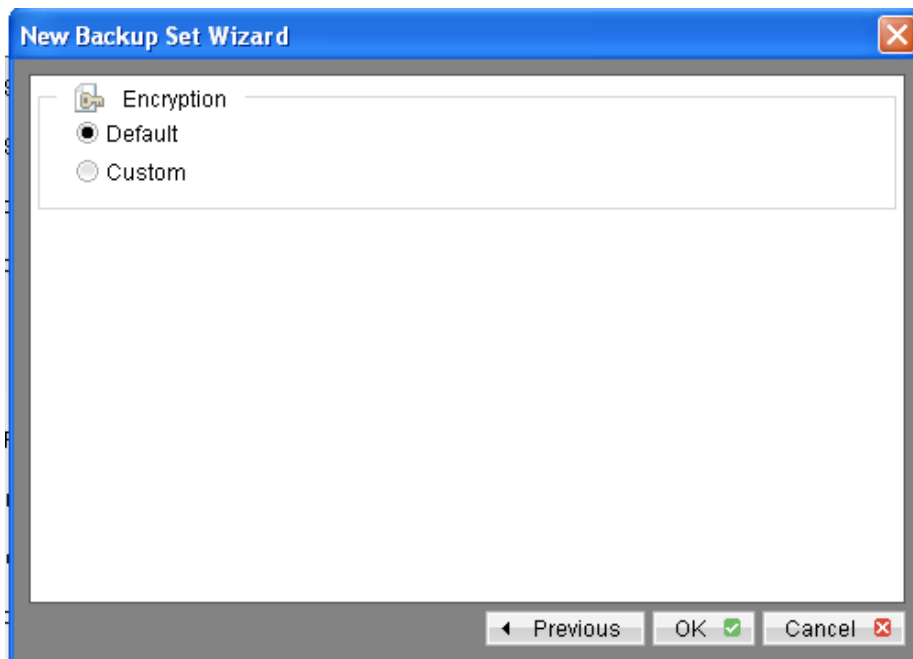
Press [Advance] to add more files to the backup set.



Set the backup schedule (Note: You can have more than one schedule in a backup set).




Set the encryption algorithm, encryption mode and encrypting key for this backup set (Hint: For the sake of simplicity, just select the [Default] radio button (your encrypting key is set to be the same as your backup account password)).

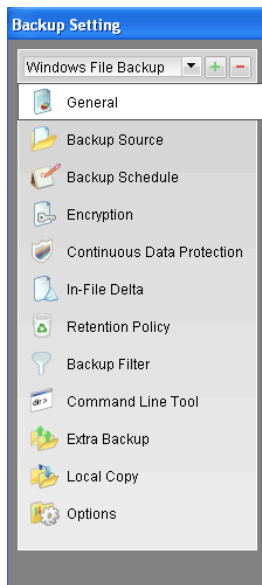


Click 'OK' to save the job.

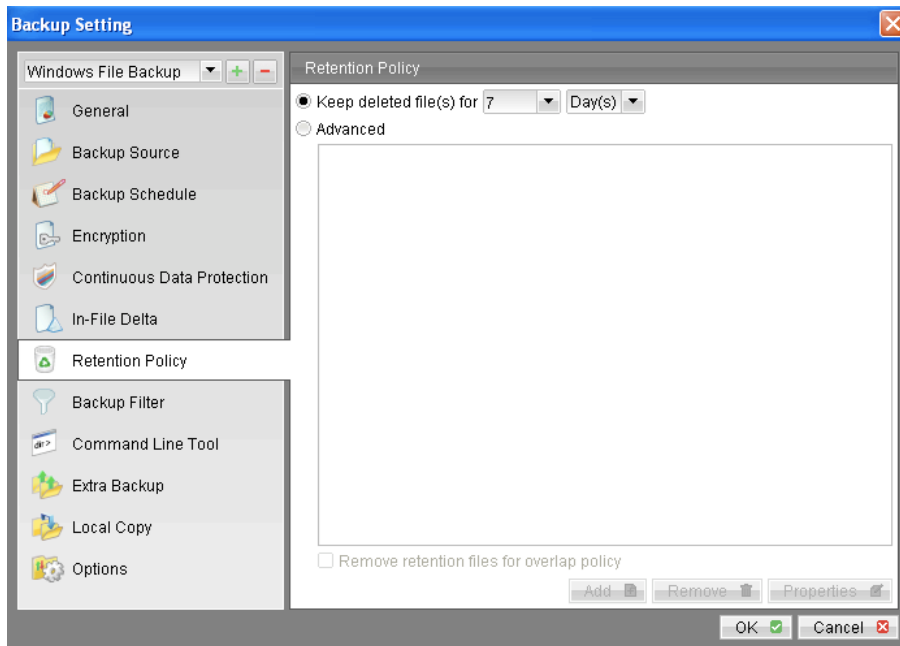
3 Walkthrough – setting up an advanced retention policy to mirror traditional tape rotation

Open Lokkbox OBM.

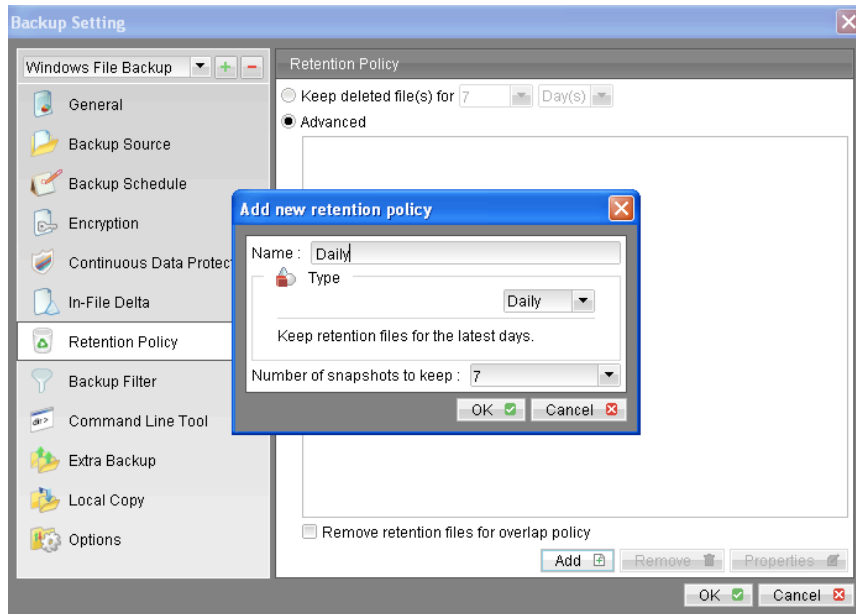
To start editing up backup sets, click the  button to open the [Backup Setting] dialog. Select the backup set to edit from the drop down list (in this case we are going to edit a previously created backup set called 'Windows File Backup Set':



Click on 'Retention Policy' and the default retention screen will be brought up:

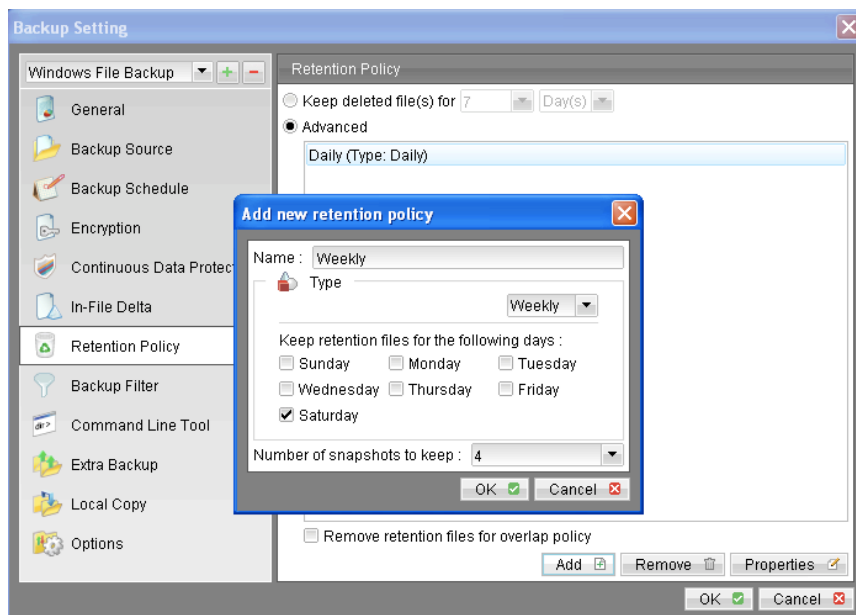


Click 'Advanced' followed by 'Add'. Rename the first retention policy to 'Daily' as follows:



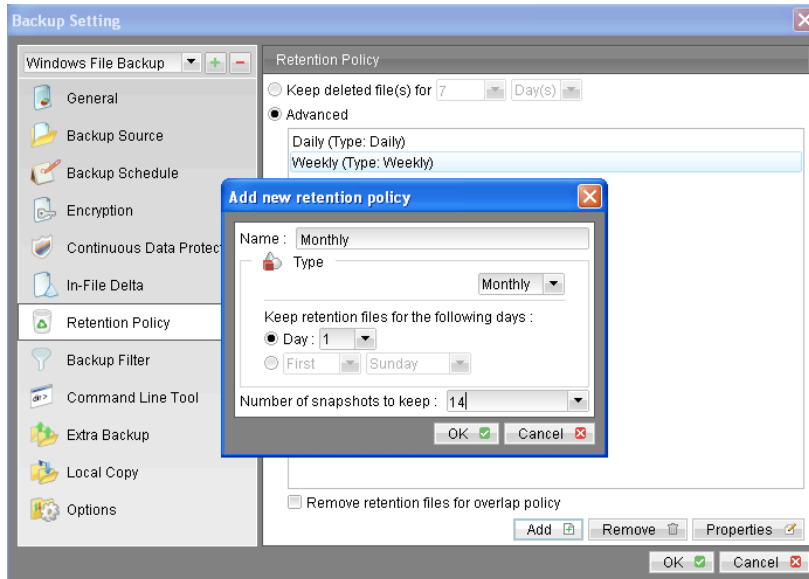
Click 'OK'. This will set the daily backup at 7 days.

Next, click 'Add' again and this time, rename the policy 'Weekly' and change the type to 'Weekly' and select the day that you wish to retain each week. In this example we will use Saturday. In addition, change the 'Number of Snapshots to keep' to 4 (i.e one month's worth of "end of week" backups):



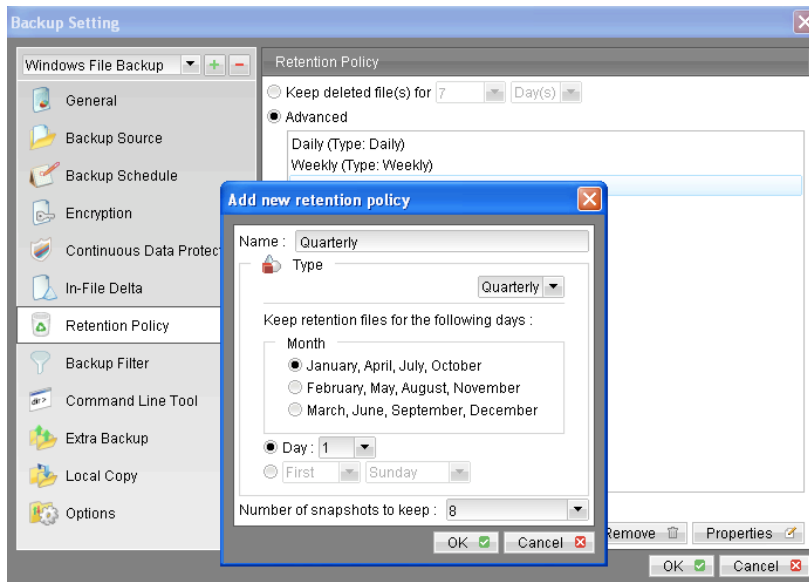
Click 'OK'. This will set the Weekly (i.e. "end of week") backup rotation at 4 weeks.

Next, click 'Add' again and this time, rename the policy 'Monthly' and change the type to 'Monthly' and select the day that you wish to retain each month. In this example we will use the 1st day of every month. In addition, change the 'Number of Snapshots to keep' to 14 (i.e 14 month's worth of "end of month" backups¹):



Click 'OK'. This will set the Monthly (i.e. "end of month") backup rotation at 14 months.

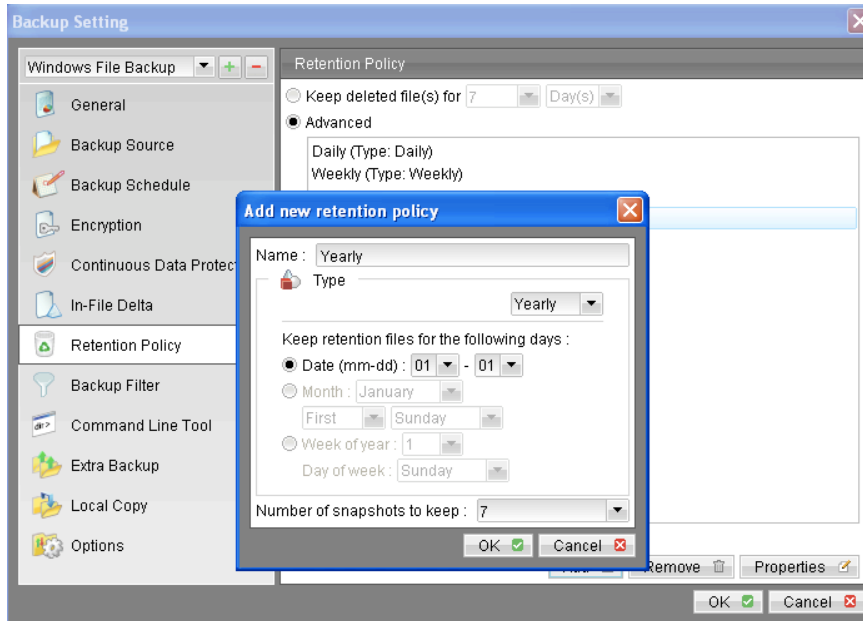
Next, click 'Add' again and this time, rename the policy 'Quarterly' and change the type to 'Quarterly' and select the series of quarterly backups that you wish to retain each quarter. In this example we will use the 1st of "Jan, Apr, Jul and Oct". In addition, change the 'Number of Snapshots to keep' to 8 (i.e 8 quarter's worth of "end of quarter" backups):



¹ It is advisable and good practice to keep more than 12 months of monthly backups. Alternatively, you type in any retention amount that you require in the box

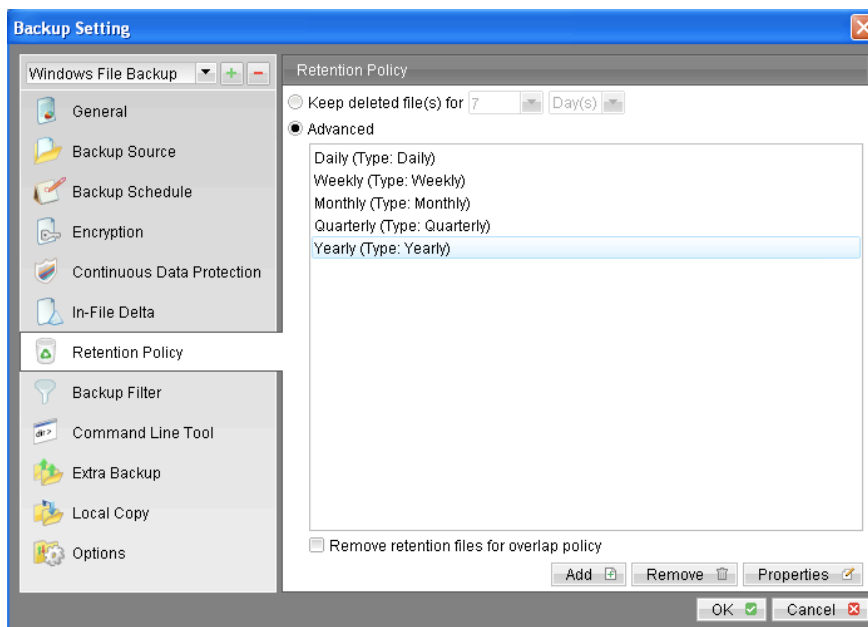
Click 'OK'. This will set the Quarterly (i.e. "end of quarter") backup rotation at 8 quarters.

Next, click 'Add' again and this time, rename the policy 'Yearly' and change the type to 'Yearly' and select the series of quarterly backups that you wish to retain each year. In this example we will use the 1st day of January. In addition, change the 'Number of Snapshots to keep' to 7 (i.e 7 year's worth of "end of year" backups):



Click 'OK'. This will set the Yearly (i.e. "end of year") backup rotation at 7 years.

The retention policy should now look like this. Click OK to save the changes:



Click 'Save Setting'. This will save the settings to the LokkBox OBS.

