These technical notes contain information about consistently backing up a live (HOT) EMC Documentum Content server and recovering it by using CYA HOTBackup and EMC NetWorker. Topics include:

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Revision history

Table 1 on page 4 presents the revision history of this document:

Table 1 Revision history

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<thead>
<tr>
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<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A01</td>
<td>March 30, 2012</td>
<td>Initial release of this document.</td>
</tr>
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</table>
Introduction

These technical notes provide information about consistently backing up a live (HOT) EMC Documentum Content server and recovering it by using CYA HOTBackup and EMC NetWorker, without making the system go offline.

You can contact CYA Technologies, Inc., which is an enChoice Company, to obtain information about CYA HOTBackup.

You can directly purchase CYA products from CYA, EMC, or authorized CYA partners by using the following websites:

- [http://www.cya.com](http://www.cya.com)
- [http://www.emc.com](http://www.emc.com)
CYA HOTBackup software requirements

The following sections describe the software requirements for performing hot backup.

Content server software requirements

Table 2 on page 6 lists the Content server software requirements. For supported software versions, refer to the appropriate EMC Documentum Content server documentation.

<table>
<thead>
<tr>
<th>Content server</th>
<th>Operating System</th>
<th>RDBMS</th>
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</thead>
<tbody>
<tr>
<td>6.0, SP1</td>
<td>Windows</td>
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</tr>
<tr>
<td>6.0, SP1</td>
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</tr>
<tr>
<td>6.7</td>
<td>Solaris</td>
<td>Oracle</td>
</tr>
</tbody>
</table>

Backup server software requirements

EMC NetWorker 7.x is required.

NOTICE

Appropriate NetWorker database modules are required if you plan to use NetWorker to back up the databases in your environment. Alternatively, HOTBackup supports the usage of database-specific backup software such as SQLServer VSS, Oracle RMAN and so on.

Application server software requirements

Apache Tomcat 6.x or 7.x is required.
Performing hot and consistent backup for EMC Documentum

CYA Technologies, Inc. provides recovery software solutions that ensure integrity, accessibility, and authenticity of content and its metadata stored in EMC Documentum. The software leverages the existing components of your backup solution that help user in performing a consistent backup of all EMC Documentum components, avoiding the following:

- Orphaned content: Content files that are not referenced in the database

**NOTICE**

A very small number of content files that are not referenced in the database can be backed up. This ensures that no broken links exist.

- Broken links: Database references that point to content that does not exist

CYA HOTBackup:

- Is an automation and control application to simplify the steps that are required to take a backup of the EMC Documentum environment while it remains live (hot).
- Is deployed through a web application server, and seamlessly integrated with EMC NetWorker. All operations are performed through the web interface.
- Controls the background processing jobs within EMC Documentum, and the order in which each EMC Documentum server component is backed up. This specialized procedure ensures the consistency of backups, and the EMC Documentum system remain live, thereby allowing users to continue processing.

![EMC Documentum environment diagram](image)

**Figure 1** EMC Documentum environment
Installing CYA HOTBackup

Installation of CYA HOTBackup is a simple process. However, ensure that you have met the software requirements that are mentioned in “CYA HOTBackup software requirements” on page 6.

1. Stop the Apache Tomcat web server service.
2. Copy the CYAHotBackup.war file to the \\webapps\\ directory in the Apache Tomcat installation directory, for example, D:\Program Files\Apache Software Foundation\Tomcat 6.0\webapps.
3. Start the Apache Tomcat web server service.
   The CYA HOTBackup software is deployed.

Initial Configuration

Any scripts that are remotely (any scripts located on any machine besides the machine HOTBackup is deployed on) run should be prefixed with nsr, and saved in the bin directory of NetWorker client on the remote servers.

To configure:

1. After the CYA HOTBackup software is successfully installed, specify the following in the address bar of your web browser, and press Enter:
   http://[machine name]:[Apache port number]/CYA HOTBackup
   The CYA HOTBackup Initial Configuration Settings page appears as shown in Figure 2 on page 8.

   ![CYA HOTBackup Initial Configuration Settings](image)

   **Figure 2** CYA HOTBackup configuration

2. Specify the following fields, and click Configure:
   • **Directory**: Specify the name of the directory where you want the CYA HOTBackup application settings to be stored.
A small database and some helper files required by the HOTBackup software are created in this directory.

If you want to reuse the database and the configuration files of the previous version of CYA HOTBackup that is installed, ensure that you specify the respective installation directory in the Directory field.

- **Recreate CYA tables if they already exist**: Select this option if a previous version of CYA HOTBackup exists, and you want to recreate all database tables.

**NOTICE**

This deletes the existing information such as backup jobs, job logs, and so on.

After the configuration is successfully completed, the Login button is enabled.

3. Click **Login**.

   The Create a user page appears as shown in **Figure 3 on page 9**.

![Create a user](image)

**Figure 3 Creating a user**

This is a one-time screen that allows you to create the HOTBackup administrator's username and password.

4. Specify the following fields and click **Create**:

   - **User Name**: Specify the name of the user. This username is valid only for HOTBackup.
   - **Password**: Specify the password for the username.
   - **Re-enter Password**: Specify the password again such that it matches the password that you have specified in the **Password** field.

**NOTICE**

The username and password that you have specified are required for subsequent logins to the HOTBackup application.

The user is created, and you are logged in.
Navigation throughout CYA HOTBackup is controlled using the navigation bar.

**Figure 4**  Navigation bar

The navigation bar has the following icons.

- “Logs”
- “Job Manager”
- “Settings”
- “Help”
- “Logout”

**Logs**

When you click the Logs icon, the CYA HOTBackup Application Logs page appears as shown in **Figure 5** on page 10.

**Figure 5**  Application logs

Click View Log to view the application log.

**Job Manager**

After the application settings have been properly configured, when you log in to the HOTBackup application, Jobs Manager is the default view. By using this page, you can:

- Create, modify, or delete backup jobs
- Manually run the jobs
- Check the history logs for each job.

When you click the Job Manager icon, the Jobs Manager page appears as shown in **Figure 6** on page 10.

**Figure 6**  Job manager
Do any of the following:

- To view jobs from a single repository only, select the repository from the **Repository** list.
- To view all jobs, select **ALL** from the **Repository** list.
- To edit or delete a job, click the job.
- To add a new job, click **New**.

The **New Job** page appears as shown in **Figure 7 on page 11**.

**Figure 7  New job**

The following sections of the **New Job** page describe the fields in them:

**General Information**

This section has the following fields:

- **Job Name**: Specify a name for the job that you are creating. The name can contain letters, numbers, and spaces.
- **Connection Broker**: Specify the name of the Connection Broker to which you want to establish a connection for the backup job.
- **Connection Broker Port**: From the list, select the port that corresponds to the Connection Broker that you want to connect to.
- **Repository**: Specify the name of the repository that you want to back up with the backup job.
Component Settings

This section has the following fields:

- **Select Components for Backup**: Specify the components to be backed up with the backup job. The following are the valid options:
  - **ALL**: Backs up all components of the specified Documentum repository: DB, FTI_ALL, SA_ALL.
  - **DB**: Backs up the database for the specified repository only.
  - **FTI**: Backs up a specific Full Text Index for the specified repository.
  - **FTI_ALL**: Backs up all Full Text Indexes of the specified repository.
  - **SA**: Backs up a specific Storage Area for the specified repository.
  - **SA_ALL**: Backs up all Storage Areas for the specified repository.
  - **ICF**: Backs up the EMC Documentum Installation and Configuration Files.

- **DB Script Name**: Specify the database script to be executed for the backup of the database.
  - For backups with NetWorker Module for SQL Server, the OS user that you have specified for DB server in Repository Configuration must be granted the sysadmin role within SQLServer.
  - For SQL Server backups without NetWorker Module for SQL Server, a sysadmin user (or the database owner) must be specified in the osql command.
  - For Oracle backups with or without the NetWorker Module for Oracle, a user with SYSDBA privileges must be specified in the RMAN command file.

- **Include Full Text Index**: Select the option if you have selected ALL, FTI, or FTI_ALL for Select Components for Backup, and you want to include a backup of the FTI; an FTI backup is always a FULL backup.

- **FTI Quiesce Script**: Specify the script to be executed before backing up the FTI.

- **FTI Directories**: Specify the directories that contain the Full Text Indexes. Separate the directories by using commas, and use quotes only on UNIX systems. Do not include space before or after delimiting commas. Do not use quotes s on Windows even if the directories include spaces.

- **FTI Unquiesce Script**: Specify the script to be executed after backing up the FTI.

- **FTI xPlore Hot Backup**: Select the option if you want to hot back up the xPlore Index server.

- **Include Installation and Configuration Files**: Select the option to back up the EMC Documentum ICFs; ICF backups are always full backups. You can back up the ICFs with the other components.

- **ICF Directories**: Specify the directories to be backed up as part of the ICF backup. Separate the directories by using commas, and do not use quotes even if the directories include spaces. Do not include spaces before or after delimiting commas.
Backup System Settings
This section has the following fields:

- **Device Type**: Specify the backup software being used.
- **Server Name**: Specify the server on which the backup server software exists.
- **Client Name for DB**: Specify the NetWorker client resource name for the machine on which the database software exists.
- **Client Name for FTI**: Specify the NetWorker client resource name for the machine on which the Full Text Index server exists.
- **Client Name for CS**: Specify the NetWorker client resource name for the machine on which the content exists.
- **Client Install Path**: Specify the NetWorker client installation path for the local machine on which the CYA HOTBackup software is installed. The path should point to the `\nsr` directory, for example, C:\Program Files\Legato\nsr.
- **Backup Level**: Specify the type of backup — full backup or incremental backup. This field is applicable only to the content backup, whereas FTI and ICF backups are always full backups. Specify the DB backup level in the applicable script.
- **Group Name**: Specify a valid backup group name. You can also leave this field blank so that the application uses the default value.
- **Data Volume Pool**: Specify a valid data volume pool name. You can also leave this field blank so that the application uses the default value.

**NOTICE**

Backup Level, Group Name, and Data Pool Volume fields are not applicable for database backup. You can specify the values for these fields in the script that is leveraged for the database backup.

Job Schedule
This section has the following fields:

- **Status**: Specify whether you want to either enable automatic scheduled runs of the job or pause the job's schedule.
- **Start Date**: Specify the time and the date on which you want the job to be run the next time.
- **Execution Interval**: Specify the interval during which you want the job to be run.
- **Exclude Day**: Select the **Saturday** and **Sunday** options if you want to exclude the days from the job's scheduled execution. This field is useful in implementing a backup schedule such as **run an incremental backup every day except run a full backup on Sunday**.
Settings

The Settings section of the HOTBackup interface allows you to:

- Make application-level configuration changes.
- Modify your alerts’ settings.
- Set the logging level for the application logs.
- Add, delete, or configure repositories to be used in backup jobs that are created by using Jobs Manager.

When you click the Settings icon, the **Settings** page appears as shown in Figure 8 on page 14.

**Figure 8** Settings

The following sections of the **Settings** page describe the fields in them:

**SMTP settings**

HOTBackup alerts and notifications are handled through email by your organization’s SMTP server.

- **SMTP Host**: Specify the hostname of your organization’s SMTP server.
- **Port Number**: Specify the port number to be used for establishing a connection to the SMTP server.
- **User Name**: Specify a valid username to connect to the SMTP server.
- **Password**: Specify the password that corresponds to the specified username.
- **Notify on Success**: Specify a comma-delimited list of one or more email addresses to which you want an email notification to be sent after a job is successfully completed. You can also leave this field blank so that no email notification is sent after a job is successfully completed.
- **Notify on Failure**: Specify a comma-delimited list of one or more email addresses to which you want an email notification to be sent when a job encounters an error during execution. You can also leave this field blank so that no email notification is sent when a job encounters an error.
Log Level Settings
Select the log level for HOTBackup logs from the list. The following are the valid log levels:
- Off
- Warning
- Normal
- Verbose
- All

Repository Configuration
You can edit and delete the existing configurations.
To add a new repository configuration, click Add Repository.
The Configuration Information page appears as shown in Figure 9 on page 15.

Figure 9  Configuration information
The following sections of the Configuration Information page describe the fields in them:

Repository Credentials
This section has the following fields:
- Connection Broker Server: Specify the server on which the Connection Broker exists.
- Connection Broker Port: Specify the port number to be used to connect to the Connection Broker.
- Repository: Specify the name of the repository that you want to configure for backups.
- User Name: Specify a valid Superuser login for the specified repository.
- Password: Specify the password that corresponds to the specified username.
- Domain [optional]: Specify a domain to be used in conjunction with the username and password to connect to the EMC Documentum repository.
- Test Connection: Click this to test the specified EMC Documentum connection credentials.
Server Settings
This section has the following fields:

- **HB server not installed on Database Server:** Clear this option if HOTBackup is installed on your database server.

- **OS User Name (Windows Only):** Specify a valid OS username for the machine on which the database is located. This parameter is used only if the database machine is a Windows server.

- **Password (Windows Only):** Specify the password that corresponds to the specified username. This parameter is used only if the database machine is a Windows server.

- **HB server not installed on FTI Server:** Clear this option if HOTBackup is installed on your FTI server.

- **OS User Name (Windows Only):** Specify a valid OS username for the machine on which the FTI is located. This parameter is used only if the FTI machine is a Windows server.

- **Password (Windows Only):** Specify the password that corresponds to the specified username. This parameter is used only if the FTI machine is a Windows server.

- **HB server not installed on Content Server:** Clear this option if HOTBackup is installed on your Content server.

- **OS User Name (Windows Only):** Specify a valid OS username for the Content Server. This parameter is used only if the Content Server machine is a Windows server.

- **Password (Windows Only):** Specify the password that corresponds to the specified username. This parameter is used only if the Content Server machine is a Windows server.

Help
When you click the Help icon, a page appears as shown in Figure 10 on page 16.

About CYA SmartRecovery

Application name: CYA HOTBackup 2.0g for EMC Documentum
Application vendor: CYA Technologies, Inc.
Version number: 2.0g
Build date: November 29 2011

Contacting CYA Technical Support

CYA maintains three ways to contact Technical Support for issues or questions related to the use of CYA software, as noted below. CYA Technical Support maintains the hours of operation and priority call back times as defined in your annual maintenance contract:

**Phone:**
CYA Technical Support can be reached directly via phone at 203.513.3111 extension 649.

**E-mail:**
You can send an e-mail with a description of the error encountered for which you require assistance, to support@cyaca.com.

**Web:**
You can connect to the CYA Support Web site and log your request for assistance at http://support.cyaca.com. This method requires you to have an established user account. If you do not currently have an account you can register for one at http://support.cyaca.com.
The Help page has the HOTBackup product version information and contact information of the CYA Support Team.

Logout

When you click the Logout icon, you are logged out of the application.
Recovering your system from EMC NetWorker

To recover your system from EMC NetWorker:

1. Choose the NetWorker recovery method.

   The following are the main methods to recover data:
   • Recovery by file selection (index-based recovery)
   • Recovery by save set selection

   Recovery by file selection is the most flexible and easy-to-use method to recover data. However, save set recovery is preferable, especially when there is a large amount of data to be recovered or data is not available for quick access because it has passed its browse policy.

   **Recovery by file selection**

   Recover data by file selection when:
   • The exact name of the file or directory to be recovered is unknown, and you want to browse the file system.
   • A directed recovery is required. A directed recovery is a recovery where data that was backed up from one computer is recovered to another computer.
   • Only the files that are marked for recovery are recovered (not extra files).
   • It is important to keep the recovery operation as simple as possible. A save set recovery can be a more complex operation.

   **Recovery by save set selection**

   Recover data by save set selection when:
   • You want to recover a large number of lost files, for example, in case of a total disk failure. In this case, you do not have to mark individual files for recovery.
   • The recovery of extra files is acceptable.
   • Quick access to the backup data is not available because the data’s browse policy has expired. Quick access can be recovered by re-creating the browsable client file index with the scanner program. However, this can be a time-consuming process.
   • Memory on the recovery host is an issue. Recovering by save set selection requires less memory than recovering by file selection.

2. Use the `mminfo` command to check whether the list of save sets is available for recovery.

   The `mminfo` command reports information about NetWorker media and save sets. Use the `mminfo` command to view the list of EMC Documentum save sets available for recovery.
For example:

3. Recover workflow order in which EMC Documentum components should be recovered.

   NetWorker supports the recovery of the following components from existing backups:
   
   - Installation and Configuration Files
   - Storage Areas
   - Full-Text Indexes
   - DB

   For consistency, these EMC Documentum components must be recovered in the exact
   specified order. Database and database log backups must be recovered by using the
   appropriate methods, depending on how the backups were actually performed.

4. Use NetWorker User program to browse and recover SA/ICF/FTI.

Recovering data on UNIX systems

a. To recover data to a UNIX client:

   Start the nwrecover program by typing the following command:

   ```
   nwrecover
   ```

   Use the `-s servername` option with nwrecover to specify a particular NetWorker
   server on the network to be used when recovering data.

   The `servers` file, which is located in `/nsr/res/servers`, contains an entry for each
   available server. If the `-s` option is not entered, and there is only one server
   detected, that server will be automatically connected. If there are no servers
   detected, or if there is more than one server available, the Change Server
   dialog box that allows you to choose the server appears.
Use the `-c client` option to specify a particular NetWorker client on the network. If the `-c` option is not used, the local client is assumed. The `nwrecover` program displays a representation of the client’s file system.

The NetWorker Recover - Browse Time `xx/xx/xxxx xx:xx:xx xx` page appears as shown in Figure 11 on page 20.

**Figure 11** NetWorker recover - Browse time

b. Select those files and directories that you want to recover. Select either individual SA or ALL SA for recovery.

c. Click the Start icon to start the recovery.

d. In the Recover Options dialog box, select the appropriate options, and click OK.

The time taken to recover the files depends on file size, network traffic, server load, and tape positioning. During this time, messages appear so that you can monitor the recovery. If the recovery is successful, a message appears as shown in Figure 12 on page 20.

**Figure 12** Successful recovery - Unix

e. Similarly, recover ICF and FTI components of EMC Documentum.
Recovering data on Windows systems

The information in these sections refers to using the NetWorker User program to recover data. To recover data to a Windows client by using the NetWorker User program:

a. In the NetWorker User program, click Recover. The Source Client dialog box appears.

b. Select the source client that has the data that you want to recover, and click OK. The local client is the default selection.

c. Select the destination client for the recovered data, and click OK. The local client is the default selection.

d. In the left pane of the Recover window, click the appropriate directory folder as shown in Figure 13 on page 21.

e. Select those files and directories that you want to recover.

f. Click the Start icon to begin the recovery.

The time taken to recover the files depends on file size, network traffic, server load, and tape positioning. During this time, messages appear so that you can monitor the progress of the recovery. If the recovery is successful, a message appears as shown in Figure 14 on page 22.
Recovering your system from EMC NetWorker

Figure 14  Successful recovery - Windows

5. Perform DB recovery with respective modules. For information on DB recovery, refer to NetWorker Module specific documentation such as NetWorker Module for Oracle, NetWorker Module for SQL, and so on.

g. Similarly, recover ICF and FTI components of EMC Documentum.
Performing a Granular (object) Recovery

CYA SmartRecovery is required to recover data from logical and operational incidents. It performs hot and consistent backups that enable one or several objects that have been lost or corrupted due to logical failures, and have to be quickly and easily recovered to the repository in their original states by a single administrator - all while EMC Documentum is online.

CYA SmartRecovery works seamlessly with your enterprise backup solutions to help you meet or exceed RTOs, and achieve RPOs of just 15 minutes. CYA SmartRecovery leverages the EMC Documentum Foundation Classes (the EMC Documentum Content server APIs), and integrates with the same components as the Content server. Recovering information is as simple as browsing the folders and the documents from CYA SmartRecovery’s intuitive interface and selecting or querying what you want to recover.

Table 3 on page 23 lists the features of CYA SmartRecovery and their benefits.

<table>
<thead>
<tr>
<th>Highlights and features</th>
<th>Benefits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hot, granular recovery of EMC Documentum objects (content and metadata)</td>
<td>Ensures business continuity and helps meet/exceed SLAs by enabling one or several objects to be quickly recovered to the repository in their original states while EMC Documentum stays online.</td>
</tr>
<tr>
<td>Hot and consistent backups of content and metadata</td>
<td>Maximizes uptime, ensures data integrity, and facilitates rapid response to audits, inspections, and litigation by capturing, validating, and preserving objects in a synchronized and single pass without any downtime. Corrects data consistency issues that are caused by CDP, snapshots, and other technologies.</td>
</tr>
<tr>
<td>Automatic record purge</td>
<td>Aligns with EMC Documentum Retention Policy Services (RPS) to destroy content and metadata after its removal from EMC Documentum. Also, it enables administrators to specify a retention period which when expired triggers permanent deletion of records from CYA capture sets.</td>
</tr>
<tr>
<td>Time-based recovery option</td>
<td>Enhances existing disaster recovery strategies by working seamlessly with traditional solutions to reduce RPOs to 15 minutes in case of a disaster.</td>
</tr>
<tr>
<td>Corruption detection</td>
<td>Data Integrity Module (DIM) enables proactive resolution of referential integrity issues by identifying broken relationships (corruptions) that typically exist in repositories at the application level, that is, between a document and its associated metadata.</td>
</tr>
<tr>
<td>Lost and corrupt information tracking</td>
<td>Ensures rapid and painless recovery by enabling administrators to see at a glance what has been lost/deleted from the repository.</td>
</tr>
<tr>
<td>One-step folder recovery</td>
<td>Facilitates fast recovery by allowing administrators to view the folder structure of the docbase within the CYA SmartRecovery interface, and select folder names to quickly recover all or specific files in the folders.</td>
</tr>
<tr>
<td>Multi-language support</td>
<td>Supports international character sets for easy global deployment.</td>
</tr>
<tr>
<td>Minimal system requirements</td>
<td>Utilizes the same memory and CPU resources as just one EMC Documentum user, allowing CYA capture jobs to run as often as every 15 minutes.</td>
</tr>
<tr>
<td>Fast deployment</td>
<td>CYA SmartRecovery can be deployed, configured, and tested in three days.</td>
</tr>
</tbody>
</table>
Migrating from EMC NetWorker Module for Documentum

Similar to EMC NetWorker Module for Documentum, CYA HOTBackup leverages EMC NetWorker to perform backups of your EMC NetWorker Module for Documentum environment. Because EMC NetWorker still serves as the back-end for CYA HOTBackup, many aspects of the EMC NetWorker Module for Documentum configuration can be reused when CYA HOTBackup is implemented.

Existing EMC NetWorker Module for Documentum customers follow the standard installation procedures for a new installation of CYA HOTBackup. After CYA HOTBackup is fully configured and backups are scheduled through this application, the EMC NetWorker Module for Documentum backup jobs can be stopped.

The existing NetWorker backups taken by EMC NetWorker Module for Documentum should be kept for the reminder of their retention period, and can be recovered at any time by following the standard NetWorker recovery procedure.

CYA HOTBackup starts creating new NetWorker backups, which are used for any disaster recovery that does not require a rollback to a point-in-time earlier than the CYA HOTBackup installation.

Existing Volume Pools that are actually created for EMC NetWorker Module for Documentum backups can be reused for CYA HOTBackup backups. Any existing scripts that were created for backing up the databases by using EMC NetWorker Module for Documentum can easily be re-used by the CYA HOTBackup application. CYA HOTBackup Administration Guide has detailed configuration instructions.
These technical notes use the following terms that are specific to EMC Documentum or to traditional backup software. Potentially confusing terms are defined:

- **Connection broker**: Connection Broker, formerly called as DocBroker, is a EMC Documentum construct that handles communication with the repositories.

- **Repository**: This is the term for the broadest EMC Documentum organizational structure for containing data. It was formerly called the docbase.

- **FTI**: The Full Text Index server is responsible for indexing all content files for searching. This is a EMC Documentum server, and can either be running the older FAST search engine or the newer xPlore search engine software technologies.
  - **FAST**: Older FTI Search Engine; not supported after December 31, 2011
  - **xPlore**: Latest FTI Search Engine; replaced FAST

- **Data volume**: This is a NetWorker organizational concept. Settings can be configured at the Data Volume level on the NetWorker server.

- **Group name**: This is a NetWorker organizational concept. Settings can be configured at the Group level on the NetWorker server.

- **Content server**: This is the main software server for EMC Documentum. The content files reside on this server. There can be multiple Content servers in a single environment. Typically, the EMC Documentum server software resides on the Content server.

- **Storage area**: This is the location of the content files on the EMC Documentum Content server.

- **ICF**: Installation and Configuration Files.