V-Series Backup and Restore v7.5.1

Applies To:	Websense V-Series Appliance v7.5.1 Model V5000 G2

Backing up your appliance is a straightforward process to ensure your critical information is available should you need to restore the appliance. As part of a Disaster Recovery Plan, you should back up your system periodically to ensure you have a backup of the most recent configuration.

These Backup and Restore procedures are divided into the following sections:

◆ *Backup utility*
- ■ *Backing up the appliance configuration (full backup)*
- ■ *Backing up modules (policy backup)*
◆ *Restoring a backup file*

Backup utility

There are 2 types of backups available on your network:

◆ Appliance backup: The full configuration backup saves all settings for the appliance and for all software modules, including Websense Web Security and Websense Content Gateway. You can perform a full backup on any appliance. Websense recommends running it on every appliance in your network. (Note that the full backup file may be smaller than the module backup, because it is compressed.)

◆ Module backup: This saves all configuration information, including client and policy data, stored in the Policy Database. Only the *policy source* appliance can perform this task.

After you select the type of backup you want, the Backup Utility checks all Websense components on the machine, collects the data eligible for backup, and creates an archive file. The file name includes a date stamp.

Data saved by the Backup Utility can be used to import Websense configuration and policy information in the event of a power failure, equipment malfunction, or equipment replacement.

The backup function must be triggered by you; it is not automatic.

Up to 5 appliance backup files and 5 module backup files can be stored on the appliance. If you request a sixth backup file, the oldest one is automatically deleted when the new one is created.

Backup files are stored on the appliance in an internal directory. This directory cannot be moved or renamed.

You can download backup files from the appliance to another location on your network. This enables you to:

◆ Store appliance and Websense policy backup files in a safe and secure location
  This should be part of your organization's regular backup procedures

◆ Move a module backup file to another appliance if needed

You can also delete old backup files.

Backing up the appliance configuration (full backup)

This backs up all settings for the appliance and for all Websense software modules on the appliance. Although you can perform the backup from any appliance on your network, the data included in the backup file varies according to the appliance on which you run it. Websense recommends you run a full backup on each appliance in your network.

> **✓ Note**
>
> If you have system components that are installed off the appliance— such as reporting or Log Server machines— Websense recommends you perform backup on all components and appliances at approximately the same time. Then when you restore the system, restore from a time-compatible set of backups on all machines.

Appliance backup files include:

◆ All configuration files for the appliance on which the backup is run, including configuration files for the Appliance Manager

◆ A snapshot, including all configuration data, of Websense Content Gateway

◆ All configuration settings for Websense Web Security, captured by the Websense Backup Utility, **wsbackup**. This includes:

  ▪ Global configuration information

  ▪ Local configuration information, such as Filtering Service and Log Server settings, stored by each Policy Server

- Websense component initialization and configuration files: **.ini** files, **.cfg** files, and **config.xml**
- The Policy Database and settings in **policy.xml** if run on the *policy source* appliance

Performing a full backup:

1. From the chosen appliance, select **Administration > Backup Utility**.
2. Ensure the Backup tab is active.
3. For backup mode, select **Back up full configuration**.
4. Click **Perform Backup**.
5. The backup file for this operation is added to the table on the bottom portion of the page. The table lists:
   - The data and time of the backup.
   - The name of the backup file.
   - The patch version of the appliance that generated the backup. When you restore from a backup, the backup file must be the *same version* as the appliance you are restoring.
   - The host name of the backup source, so you can see which appliance generated the backup file.
   - A comment on the policy information in each backup file:

     Full policy source is the standard comment if the backup was generated on the policy source appliance.

     User directory and filtering is the standard comment if the backup was generated on an appliance configured to run those components.

     Filtering only is the standard comment if the backup was generated on a filtering only appliance.
6. To download the file to another machine, right-click the file name, select **Save As**, and browse to the location of interest.

Backing up modules (policy backup)

This saves all configuration information, including client and policy data, stored in the Policy Database. Only the *policy source* appliance can perform this task.

1. From your *policy source* appliance, select **Administration > Backup Utility**.
2. Ensure the Backup tab is active.
3. For backup mode, select **Back up module configuration**.
4. From the pull-down menu, choose the software module **Websense Web Security**.
5. Click **Back Up Policies** to back up the Policy Database.
6. The backup file for this operation is added to the table on the bottom portion of the page. The table lists:
   - The data and time of the backup

- The name of the backup file. Click the file name to view its contents.

Note that backup operations for Websense Content Gateway are managed through Content Gateway Manager (the proxy user interface). To back up the proxy, select the Websense Content Gateway module from the pull-down list, then click the **Content Gateway Manager** link.

Restoring a backup file

The restore process allows you to revert the appliance configuration to a configuration from a previous backup. The restore operation is initiated from the TRITON - Web Security Backup Utility.

> **Important**
>
> Before starting a Restore process, stop all Websense components that are running off the appliance. For example, stop Log Server, Sync Service, Linking Service, transparent ID agents, **TRITON - Web Security,** and all components on an integrated **Data Security Management Server**.

When you initiate the restore process, all current settings for the appliance and modules are erased. The backup files stored on the appliance are not affected. When the restore process is complete, the appliance is restarted.

Restoring a full appliance configuration

When you restore a full configuration, you are, in effect, re-creating the original machine that was backed up. The following requirements must be met:

◆ The current appliance version must match the version associated with the backup file. (The appliance version is displayed on the **Restore** tab.) Thus, a version 7.5 backup can be restored only to an appliance that is at version 7.5.

◆ The appliance model must be the same as the model that was backed up. (A backup from model V5000 G2 must be used to restore a model V5000 G2 appliance.)

◆ The original appliance that was backed up cannot also be running elsewhere in the network. Restoring a full configuration re-creates the original appliance and makes use of unique ID numbers from that appliance.

To restore a full configuration:

1. Stop all Websense components that are running off the appliance. For example, stop **Log Server**, **Sync Service**, **Linking Service**, transparent ID agents, **TRITON - Web Security**, and all components on an integrated **Data Security Management Server**.

2. From any appliance in the network, select **Administration > Backup Utility**.

3. Click the Restore tab.

4. For restore mode, select **Restore full configuration**.

5. Select a radio button to indicate where the full backup file is stored, on the appliance or elsewhere.

   • **Restore from a backup stored elsewhere.** Browse to and select the backup file you want. Click **Upload** to initiate the upload of the selected backup and verify version compatibility. When the upload is complete, a popup window appears with details of the selected backup file.

   ✔ **Note**
   If you want to restore from a backup stored elsewhere and there are already 5 backup files stored on this appliance, you must delete 1 backup file from the appliance before you can upload the required backup from its location.

   • **Restore from a backup stored on the appliance.** Select a backup from the list. Files that are incompatible with the current version of the appliance display their version number in gray text.

6. When you have selected a valid backup file, click **Restore Full Configuration**. The appliance restarts and is restored to its original configuration.

7. Start the Websense components that are running off the appliance.

Restoring a policy configuration

Restore a policy configuration to an appliance that you plan to use as a *policy source* machine.

1. Before starting a Restore process, stop all Websense components that are running off the appliance. For example, stop **Log Server**, **Sync Service**, **Linking Service**, transparent ID agents, **TRITON - Web Security,** and all components on an integrated **Data Security Management Server**.

2. From your policy source appliance, select **Administration > Backup Utility**.

3. Click the Restore tab.

4. For restore mode, select **Restore module configuration**.

5. From the pull-down menu, choose the software module **Websense Web Security**.

6. Select a radio button to indicate where the Policy Database backup file is stored, on the appliance or elsewhere.

- **Restore from a backup stored elsewhere.** Browse to and select the backup file you want. Click **Upload** to initiate the upload of the selected backup and verify version compatibility. When the upload is complete, a popup window appears with details of the selected backup file.

> ✔ **Note**
>
> If you want to restore from a backup stored elsewhere and there are already 5 backup files stored on this appliance, you must delete 1 backup file from the appliance before you can upload the required backup from its location.

- **Restore from a backup stored on the appliance.** Select a backup from the list. Files that are incompatible with the current version of the appliance display their version number in gray text.

7. When you have selected a valid backup file, click **Restore Policies**. The Policy Database is retored to its previous condition.

8. Start the Websense components that run off the appliance.

Note that backup operations for Websense Content Gateway are managed through Content Gateway Manager (the proxy user interface). To restore the proxy, select the Websense Content Gateway module from the pull-down list, then click the **Content Gateway Manager** link.