



TBMR For Linux

Bare Machine Recovery for IBM Spectrum Protect

User Guide

Version 9.5.1 released March 2023

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Contents

1	Document Conventions	4
2	Introduction 2.1 Limitations	5
	2.2 Further Information	5
3	System Requirements	6
4	Supported Filesystems	7
5	uEFI and MBR BIOS Support	8
6	Using TBMR For Disaster Recovery	9
	6.1 Saving the System Configuration	
	6.2 TBMRcfg	
7	Spectrum Protect Client Backup	12
	7.1 Housekeeping	12
8	Performing a Recovery	13
	8.1 Build Custom ISO	
	8.2 Command Line Recoveries	26
9	Post Recovery Options	28
	9.1 Copy Log Files	
	9.2 Show Log Files	31
10	Cristie Technical Support	32



1 Document Conventions

The following typographical conventions are used throughout this guide:

	represents command-line commands, options, parameters, directory names and filenames
Next >	used to signify clickable buttons on a GUI dialogue
Note:	describes something of importance related to the current topic

2 Introduction

Bare Machine Recovery for IBM Spectrum Protect provides disaster recovery capability for Spectrum Protect protected Linux Intel hosts.

It is possible to recover the original system to the same or dissimilar hardware. To protect a system, backups can be taken periodically, along with configuration information, which includes details of hard disks, network interfaces, etc.

This Guide shows the user how to save system configuration information, backup and recover a Linux Intel machine using TBMR. More detailed information is available from man pages for the TBMR components. The man pages are available after installation of TBMR.

This guide relates to TBMR for Linux Intel version 9.5.1 only.

Note: TBMR can only be used in conjunction with IBM Spectrum Protect.

This guide describes how to:

- Save Configuration data using tbmrcfg
- Configure and run your IBM Spectrum Protect Client backup
- Perform a Disaster Recovery

2.1 Limitations

There are limits to what this version of TBMR for Linux Intel will support. It will NOT support:

- Platforms other than Intel 64-bit only.
- Multi-boot operating systems
- Recovery of files that are being written to at the time of backup.

2.2 Further Information

Further information and advice on using TBMR may be found in the **Cristie Knowledge Base** (https://kb.cristie.com) or the **Cristie Forum** (https://forum.cristie.com).



3 System Requirements

TBMR for Linux Intel can only be installed on a x86_64 Linux Intel (i.e. 64-bit) machine.

TBMR requires that Spectrum Protect BA client version 7.1 or later is already installed.

A minimum memory of **6 GB RAM** is required for booting the recovery environment and running a recovery.

Please refer to this web page https://www.cristie.com/support/matrix/ to determine the latest OS and IBM Spectrum Protect client/server support for TBMR Version 9.5.1.

Before TBMR can be used it must also be correctly licensed. Cristie provides a 30 day trial license with the product.



4 Supported Filesystems

Please refer to this web page https://www.cristie.com/support/matrix/ to determine the latest file system support for TBMR Version 9.5.1.



5 uEFI and MBR BIOS Support

Note: recovery support is provided for conversion from uEFI to MBR BIOS. Conversion from legacy MBR BIOS to uEFI is not currently supported.

The recovery ISO is configured for both MBR (legacy) and uEFI boot. It can therefore boot into either environment. There are no special considerations that need to be made by the customer for uEFI machines. If your machine boots with elilo, prior to performing a backup please run:-

tbmrcfg -b elilo

All Cristie Bare Metal Recovery software handles the recreation of the uEFI partitions during the recovery of the machine, this is transparent to the user.

When recovering an uEFI enabled OS you must recover to uEFI capable hardware.

When recovery is to a different machine, you may need to manually configure the uEFl boot stanza in order to boot the recovered uEFl OS. Please refer to the Cristie Knowledgebase for further information on editing the boot stanza.

Note: when recovering an uEFI enabled OS, it is recommended that the recovery environment is booted in uEFI mode.



6 Using TBMR For Disaster Recovery

This section describes the steps involved in using Spectrum Protect in conjunction with TBMR for disaster recovery.

This description assumes that the Spectrum Protect client software has already been installed and configured correctly.

To ensure your system is protected observe the following steps:

- 1. Install TBMR on the system you wish to protect.
- 2. Use the tbmrcfg program to capture and store the configuration of the system.
- 3. Use the Spectrum Protect Backup/Archive Client to backup the system to your IBM Spectrum Protect server as usual.

6.1 Saving the System Configuration

Configuration is always saved to /TBMRCFG - it can't be saved anywhere else. This guarantees it is always stored in the backup.

When saving the configuration information to the backup location, this must be done **before** the backup is run.

To save the configuration information for each machine, the supplied command line program <code>tbmrcfg</code> is used. It is recommended that this is run prior to running each backup to ensure the configuration is up to date.

6.2 TBMRcfg

To use the command line configuration saving program, type tbmrcfg. The configuration will automatically detect the machine boot loader and boot partition, however, if either are incorrectly detected you may specify additional options.

The available options of tbmrcfg can be shown using:

```
tbmrcfg --help
```

Some examples are shown here:

To save configuration information from a machine that boots using *grub* installed on / dev/sda to the backup location, use:

```
tbmrcfg -b grub -d /dev/sda
```

To save configuration information from a machine that boots using *grub* installed on / dev/hda, use:

```
tbmrcfg -b grub -d /dev/hda
```

There is a full manual page for thmrcfg available by typing man thmrcfg.



This is a full list of options:

Option

-b<name>, --bootloader=<name>

-d<name>, --bootdevice=<name>

-l<file>, --logfile=<file>

-o<file>, --output=<file>

-p<permissions>

-v. --verbose

--autorelabel=<n>

--disk pattern=<pattern>

--disk regex=<regex>

--disk_skip=<pattern>

--disk_skip_regex=<regex>

--disshw=<n>

--filedev_mount_options=<string>

--filedev_mount_target=<string>

--format_pattern=<pattern>

--format_regex=<regex>

--format skip=<pattern>

--format_skip_regex=<regex>

--mpath=<n>

--partition_pattern=<pattern>

--partition_regex=<regex>

--partition_skip=<pattern>

--partition_skip_regex=<regex>

--local_fs

--local_disks

--rc=<n>

--rescale_pattern=<pattern>

--rescale_regex=<regex>

--rescale_skip=<pattern>

--rescale_skip_regex=<regex>

--save_mpath_list

--vg_pattern=<pattern>

--vg_regex=<regex>

--vg_skip=<pattern>

--vg_skip_regex=<regex>

--help, --usage

--version

Description

Set boot loader to <name> (default is grub)

Set boot device name to <name>

Set log file (default is cbmrcfg.log)

Set output file (default is disrec.ini)

Set output file permissions (default 0600)

Verbose mode

Automatically relabel SELinux if <n>!= 0

Only include disks matching <pattern>

Only include disks matching <regex>

Don't include disks matching <pattern>

Don't include disks matching <regex>

Use dissimilar hardware support if <n>!= 0

Set file device mount options

Set file device mount target

Only format devices matching <pattern>

Only format devices matching <regex>

Don't format devices matching <pattern>

Don't format devices matching <regex>

Don't scan for mpath devices if < n > = 0

Only partition devices matching <pattern>

Only partition devices matching <regex>

Don't partition devices matching <pattern>

Don't partition devices matching <regex>

Don't include remote filesystems

Don't include remote disks, e.g. iscsi

Set return code to <n>

Only rescale devices matching <pattern>

Only rescale devices matching <regex>

Don't rescale devices matching <pattern>

Don't rescale devices matching <regex>

Save mpath details

Only create VGs matching <pattern>

Only create VGs matching <regex>

Don't create VGs matching <pattern>

Don't create VGs matching <regex>

Print this message and exit

Print the version and exit

6.3 Transitional Nodes

If you backup to a node located on a Spectrum Protect Server version 7.1.8 or 8.1.2 and above, using a Spectrum Protect client version that is less than 7.1.8 or 8.1.2, you may have to change the node **Session Security** setting to "**Transitional**" after your Disaster Recovery.

This is because the Disaster Recovery environment contains a Spectrum Protect client version later than 8.1.2 that enforces TLS communication. This will prevent older Spectrum Protect clients from accessing the node after the client has enabled TLS on the node.

You can change the Session Security by updating the node with the command:

UPDATE Node <node name> SESSIONSECURITY=Transitional



7 Spectrum Protect Client Backup

If the backup is to be written using Spectrum Protect BA client, the dsm.sys file should be configured.

The default location for the Spectrum Protect BA client option file is:

```
/opt/tivoli/tsm/client/ba/bin/dsm.sys
```

This file should be edited to point to the Spectrum Protect server to be used:

```
SErvername server_a

COMMmethod TCPip

TCPPort 1500

TCPServeraddress 10.2.1.20
```

The Spectrum Protect BA client should be configured to backup all files which are required for OS recovery.

For **btrfs** file system support only, it is recommended to add the following line to dsm.sys to exclude the snapshot directories (unless they are required):

```
exclude.dir /.snapshots/*/snapshot
```

7.1 Housekeeping

In order to ensure that you can recover to the latest version of the operating system that was installed on your Linux Intel machine, you must ensure that a Spectrum Protect incremental backup is performed every time the operating system files change.

This is not always possible, so **Cristie Software Ltd.** recommends that the Spectrum Protect incremental backup be performed regularly. However, you should choose a period which reflects the rate of change of data in your own organisation. Although the configuration data will change less frequently than the operating system, it is a wise precaution to update this regularly. For example, this can be achieved by creating a cron job for your schedule or using the Spectrum Protect Scheduler.



8 Performing a Recovery

When a machine has failed, it can be recovered using the XBMR bootable product CD/DVD-ROM or DR ISO (if your host supports this capability). XBMR is a separate product to TBMR. It is a generic Recovery Environment for all Cristie Linux BMR products.

You should ensure your machine's BIOS is set up to boot from CD/DVD-ROM or ISO as appropriate.

The process encompasses the following stages:

- Boot into XBMR Recovery Environment and configure as required
- Read Configuration Data from your backup
- **Restore** Files from your backup
- Load additional drivers (if necessary)
- Reboot into recovered OS

Boot the machine using the **XBMR** bootable CD ROM or ISO. You will then be presented with the screen below:

```
X-Windows based Linux recovery environment

Text based Linux recovery environment

Use the ↑ and ↓ keys to change the selection.

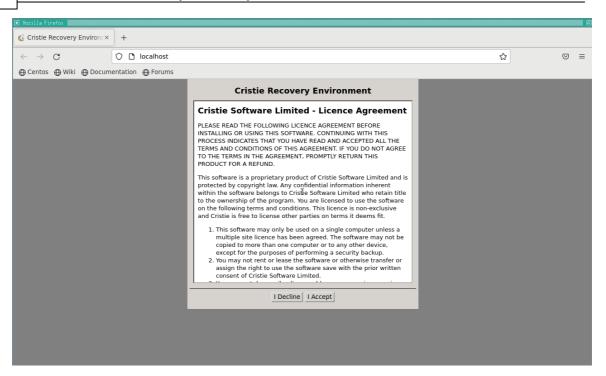
Press 'e' to edit the selected item, or 'c' for a command prompt.

Press Escape to return to the previous menu.

The selected entry will be started automatically in 13s.
```

Cristie recommends that you choose the graphical X-Windows recovery environment mode which loads the **Cristie Recovery Environment**. You will be presented with the **license** screen. Click Accept if you agree with the licencing terms.





The Product Selection drop-down menu will then be shown. Now select the Cristie product used during the backup - TBMR in this case.

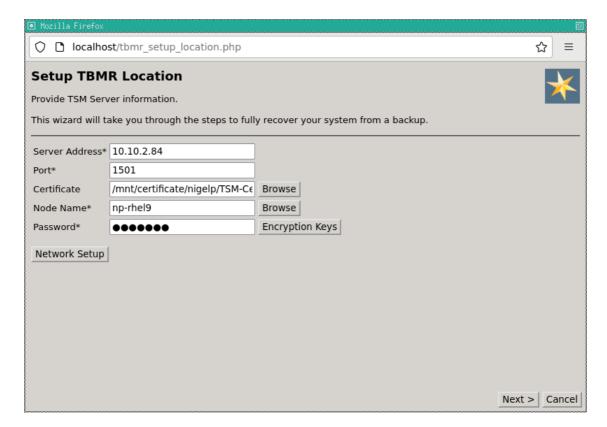


Click OK. You will then see the TBMR Recovery Environment main menu.





Cristie recommends selecting the **Automatic Recovery Wizard** option from the **Recovery Environment** main menu. This will then display the **Setup TBMR Location** dialogue box, where you can specify the IBM Spectrum Protect Server information.



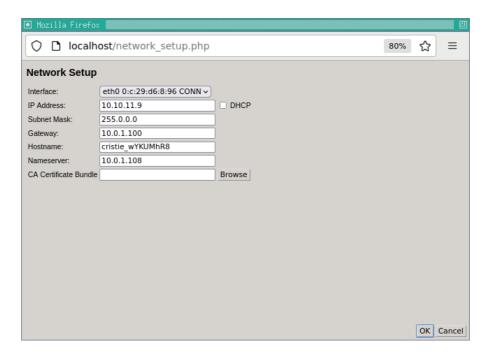
Now enter the Server details (of the IBM Spectrum Protect Server where the backup resides). Enter the Server IP address and port (1500 is the default). For IBM Spectrum Protect server version 8.1.2 you may need to set a TLS encryption certificate. Otherwise leave that

field blank. Finally enter the Node name and password. If required, it is possible to view the nodes on the server by clicking the **Browse** button next to the **Node Name**.

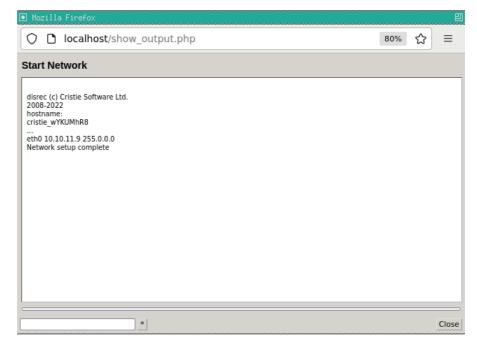
Note: You need to enter the administrative details for the Spectrum Protect Server into the Node Name and Password fields to achieve this.

Contact your IBM Spectrum Protect administrator if you are unsure of any of the settings.

If it is required to configure the local network settings (i.e. the XBMR Recovery Environment), click the Network Setup button. Now enter your new network settings.

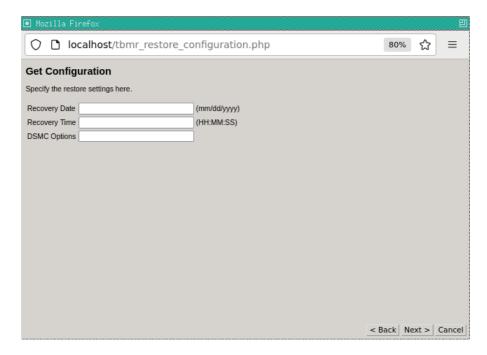


Select OK to save your changes. The Start Network screen will then display the network changes being implemented.

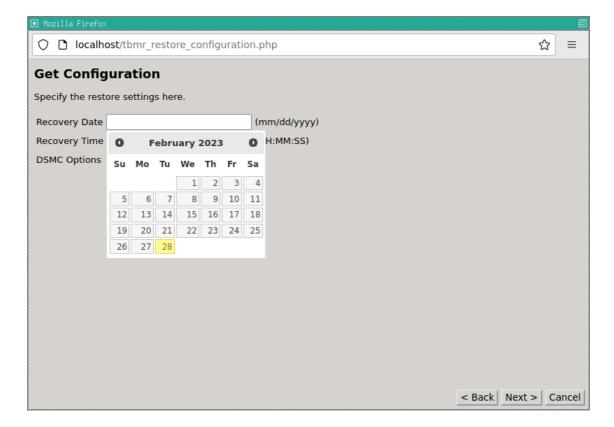




Click Close to return to the **Setup TBMR Location Wizard**. Now click Next > and the **Get Configuration** dialogue will be shown. Entering a recovery date and time will restore an available backup nearest (but earlier) to the specified date/time.



If you wish to recover a backup other than the latest (the default) select a particular date/time - a Point-in-Time (PIT). Click the Date field and a calendar will pop-up like this:



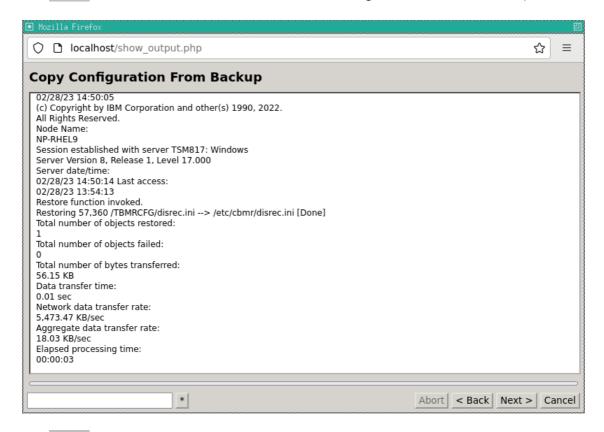
In this example this would recover a backup closest to 28 February 2023 00:00am. Note IBM Spectrum Protect will find the closest incremental backup looking backwards in time.



Normally, nothing needs to be entered under **Spectrum Protect (DSMC) recover options**. If you do need to enter any parameters, it will probably be standard IBM Spectrum Protect options. Any parameters entered will be passed to the IBM Spectrum Protect server unchanged, but they must be prefixed with a '-'. For example **-resourceutilization=2**. Please consult your IBM Spectrum Protect User Manual for full details.

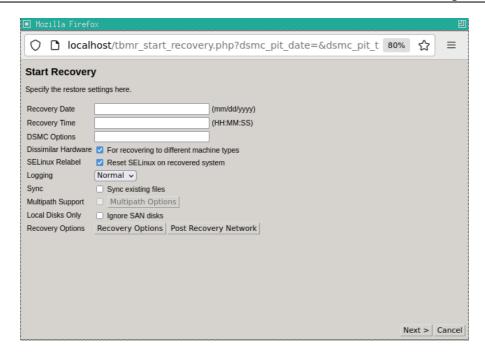
Note: for a list of these parameters and how to use them you should consult the relevant IBM Spectrum Protect User Guide.

Click Next > to continue. This will then restore the configuration from the backup.



Click Next > to continue to the **Start Recovery** phase. You will then be presented with the Start Recovery options. Here you can change the configuration of the system being restored.





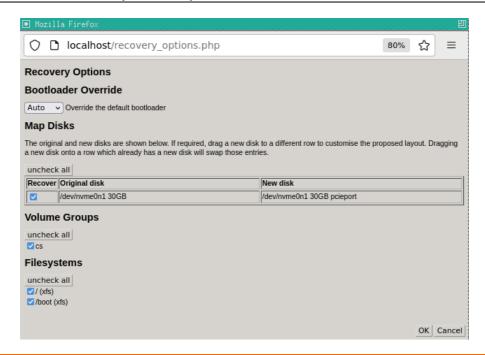
Select the **Sync** tick-box if you wish to sync existing files. This option will then run a recovery sequence of everything from the restore phase onwards - so a file restore, then a dissimilar hardware step and finally a make bootable step. If the client supports incremental restores, this will save a lot of time.

If you are recovering Multipath disks, you must check the box for **Multipath Support**. Not doing so will cause the disks to be treated as non-Multipath disks. You can then select and customise your Multipath disk layout by clicking on the Multipath Options button. Note this option is only enabled if multipath disks are set in the configuration.



If you wish, you may customise your disk layout, volume group or filesystem selection by clicking on the Recovery Options button.

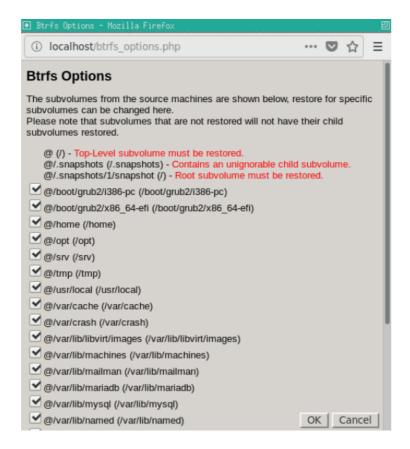




Note: disks that have been configured in the Multipath Options menu will not be visible on the Recovery Options menu.

Note: de-selecting a filesystem will disable filesystem creation and file restore.

If the system to be recovered contains BTRFS subvolumes you may configure whether they are recreated during recovery. Click the Btrfs Options button to bring up the menu (note this option is only displayed if BTRFS volumes are present).

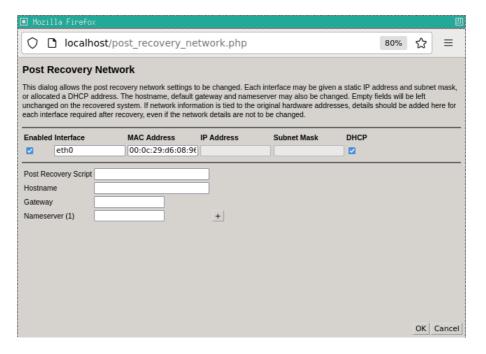




De-selecting a checkbox will prevent the recovery from recreating the subvolume. Click OK to save and continue.

Note: Some subvolumes can not be de-selected due to a child subvolume dependency or if it is a root subvolume.

If you wish to change the Network Settings in advance of recovery, select **Post Recovery Network**. This option is only available for SLES 11 or later, and Red Hat 6 or later.

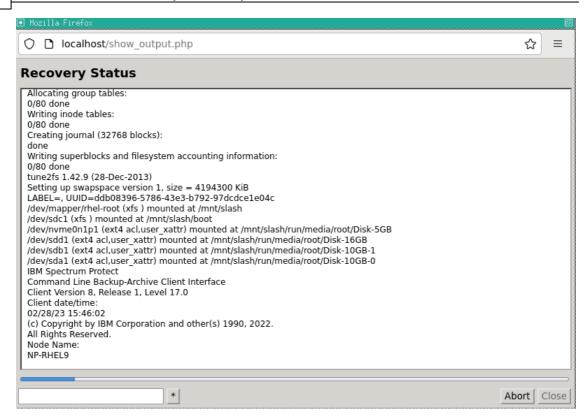


When you are satisfied that all options are correct, click OK to confirm.

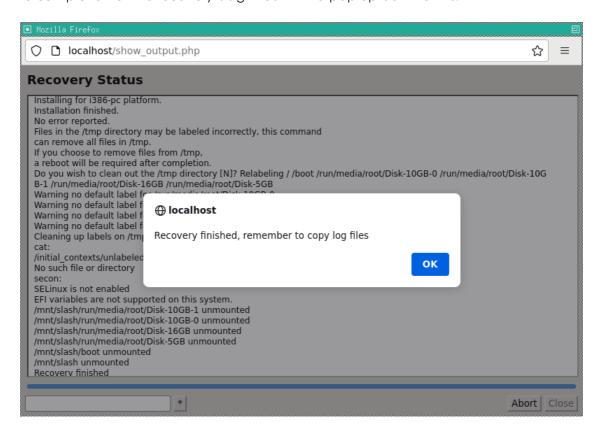
Note: The Post Recovery Network button will only be displayed if the functionality of this feature can actually be performed on the restored system.

When you are satisfied that all options are correct, click OK to confirm and return to the Start Recovery dialogue. Finally select Next > to start the recovery, which will begin with a dialog like this:

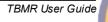




The completion of the recovery is signified with a pop-up box like this:



Cristie recommends that the log files are always saved. If the machine fails to boot after the restore Cristie Support will require copies of the log files to diagnose any problems. Details on how to save log files are described in the section **Copy Log Files**.



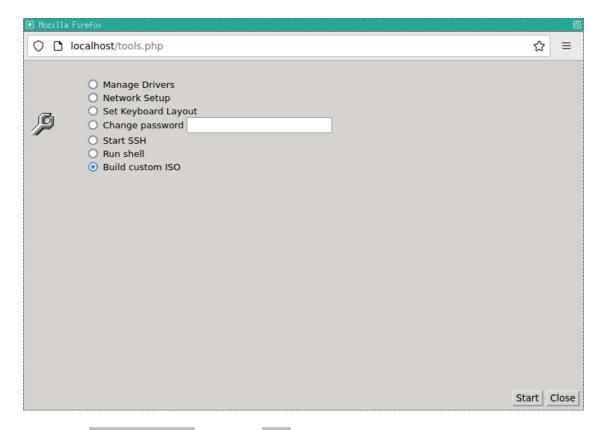
Note: if you are recovering to dissimilar hardware: TBMR will find the required module (s) automatically. Normally this will happen with no further user intervention.

Click OK to close the pop-up box, followed by the Close button to return to the Main Menu.

Finally select **Reboot** from the Main Menu to boot the restored machine, if post recovery options are not required.

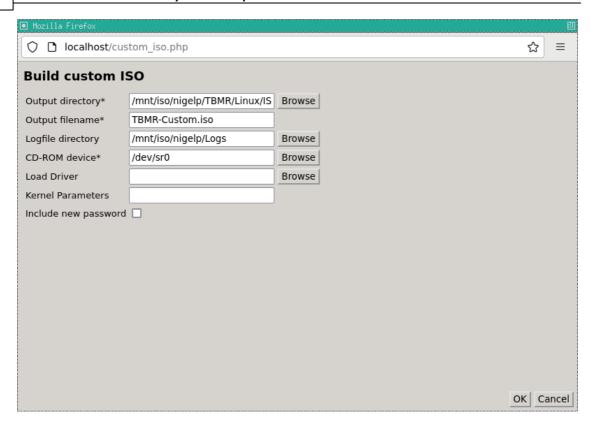
8.1 Build Custom ISO

To create a custom recovery ISO, firstly boot the supplied XBMR DR ISO on a suitable host system and select the appropriate XBMR product. Then select the **Tools** menu.



Now select Build custom ISO and click Start. The main build ISO dialogue is shown:



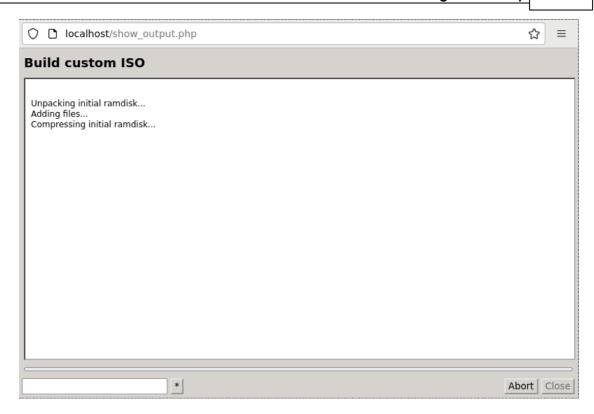


You will need to configure the following fields:

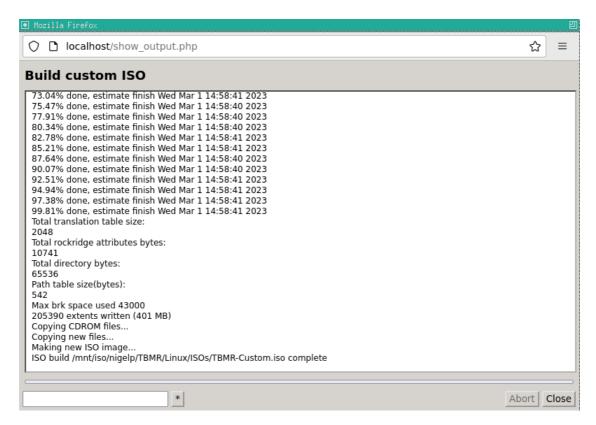
- Output directory is a network share (use Browse to select and mount a share).
- Output filename must include the .iso extension.
- Logfile directory is a network share (use Browse to select and mount a share).
- CD-ROM device (use Browse to select a CD/DVD-ROM device from /dev).
- Load Driver select the path to an optional driver file. Ensure this is compatible with the system being recovered.
- Kernel Parameters specify any extra parameters to be passed to the kernel at boot time. Be careful - this is not syntax checked.
- Include new password option will include your new ssh/http password if you have changed it in the tools menu prior to building the custom ISO.

Populate the fields as required, for example. Then click OK to begin the ISO creation.





The following progress screen will show when the ISO is successfully built.



Click Close to complete the operation. At this point you may either cancel the recovery operation or continue as required.

The created ISO may now be used to directly recover the host from the backup. However operator intervention will be required to specify the backup location details.

8.2 Command Line Recoveries

XBMR also has the ability to control all aspects of a DR sequence without using the web or curses based GUIs. To do this it uses a script based command line manually run from the built-in bash prompt. This is an advanced feature and should not be used until the User becomes familiar with TBMR DR principles and procedures.

The command line parameters supplied to the script are divided into 3 groups, **Network**, **Mount**, **Spectrum Protect** and **General**, as follows:

Network options:

--network_number = < number > Set network number (default is 0)

--route_number=<number> Set route number (default is 0)

--ip_address=<ip_address> Set recovery environment IP address

--netmask=<ip_address> Set recovery environment network mask

--hostname=<string> Set recovery environment hostname

--gateway=<ip_address> Set recovery environment default gateway

--ethtool=<command> Pass options to ethtool

Mount options:

mount_number = < number > Set mount number (default is 0)

mount_path=<path>Set mountpointmount_share<device>Set mount devicemount_username=<name>Set mount usernamemount_passwd=<passwd>Set mount passwordmount_ip_address<ip_address</th>Set mount IP address

Spectrum Protect options:

--tsm_ip_address<ip_address> Set TSM server IP address
--tsm_port=<number> Set TSM server port number
--tsm_node=<string> Set TSM server node name
--tsm_passwd=<string> Set TSM server password
--tsm_certificate=<path> Set TSM certificate path

--cbmr_tsm_node=<string>
 --cbmr_tsm_passwd=<string>
 Set TSM node name
 Set TSM node password
 --cbmr_tsm_filespace=<string>
 Set TSM node filespace name

General options:

--help Show help message and exit
--sshd=<1|0> Start ssh daemon if value=1
--reload=<string> Reload module with options



--passwd=<string> Set password for SSH and HTTP

--find_multipaths=<yes|no> Set find_multipaths option in multipath.conf --disshw=<1/0> Turn on dissimilar hardware support if value=1

--mpath=<1/0>
Turn on multipath support if value=1

--autorelabel=<1|0> Turn on SELinx autorelabel if value=1

--convert_to_mbr Supply when recovering an EFI system to an MBR target

--product=<type> One of abmr, cbmr, cbmr, nbmr or tbmr

Example (a TBMR recovery)

```
restore --product=tbmr --reload="ibmveth old_large_send=1" --ethtool="-K eth0 tso of the content of the content
```

Since this is a complex command line, and easy to get wrong during data entry, we advise preparing the command line in an editor elsewhere and pasting it into the bash prompt.



9 Post Recovery Options

After performing a recovery, it is possible to undertake the following actions:

- Copy Log Files (Cristie recommends that this action is always undertaken after a recovery)
- View Log Files

9.1 Copy Log Files

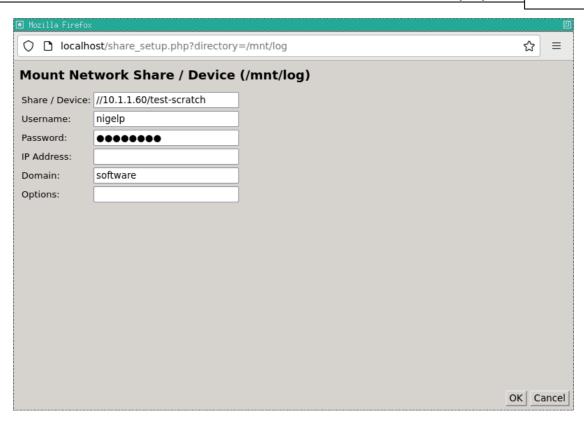
Select the icon from the **Cristie Recovery Environment** main menu.

Click Browse to select a location to copy the log files to.

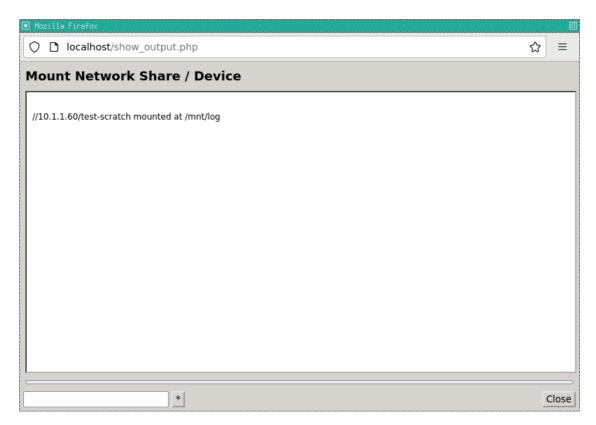


Select Browse to mount a network drive.



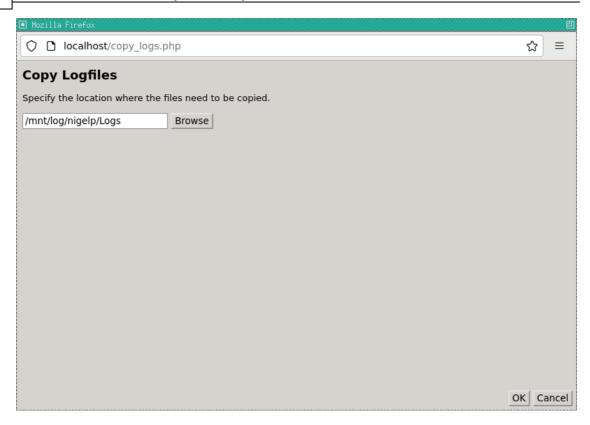


A successful mount is signified by:

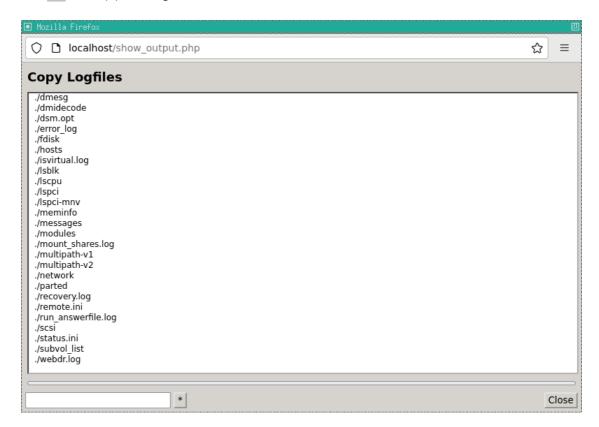


Select a directory on the mounted share:





Click OK to copy the logfiles.



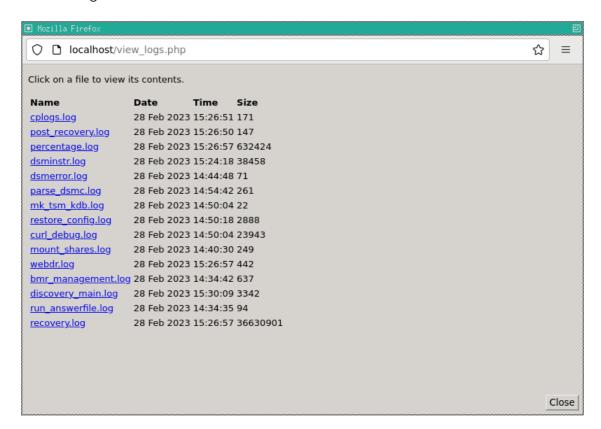
Ensure this is a location which can be easily accessed in case there is a need to email the log files to Cristie for support purposes.

Click Close to return to the Recovery Environment Main Menu.

Note: log files are essential if you require support from Cristie. They detail exactly what has happened during the recovery on your system. Without them, it is very difficult for Cristie to offer meaningful support.

9.2 Show Log Files

To view log files, select the icon from the Main Menu. This will display the list of available logfiles:



Click on the log you wish to view. Check the summary information at the bottom of the recovery status report for any errors.

Click Close to finish.



10 Cristie Technical Support

If you have any queries or problems concerning your Bare Machine Recovery for IBM Spectrum Protect product, please contact Cristie Technical Support. To assist us in helping with your enquiry, make sure you have the following information available for the person dealing with your call:

- TBMR Version Number
- Installed OS type and version
- Any error message information (if appropriate)
- Description of when the error occurs
- All Cristie log files relating to the source or recovery machine. This is very important to help us provide a quick diagnosis of your problem

Contact Numbers - Cristie Software (UK) Limited

Technical Support +44 (0) 1453 847 009

Toll-Free US Number 1-866-TEC-CBMR (1-866-832-2267)

Knowledgebase kb.cristie.com

Forum forum.cristie.com

Sales Enquiries sales@cristie.com

Email support@cristie.com

Web www.cristie.com

Support Hours

05:00 to 17:00 Eastern Standard Time (EST) Monday to Friday

Out-of-Hours support available to customers with a valid Support Agreement - Severity 1 issues* only

UK Bank Holidays** classed as Out-of-Hours - Severity 1 issues only.

Cristie Software Ltd. are continually expanding their product range in line with the latest technologies. Please contact the Cristie Sales Office for the latest product range.



^{*}Severity 1 issues are defined as: a production server failure, cannot perform recovery or actual loss of data occurring.

^{**}For details on dates of UK Bank Holidays, please see www.cristie.com/support/