Managing objects with information lifecycle management

StorageGRID 11.5

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Managing objects with information lifecycle management

You manage the objects in a StorageGRID system by configuring information lifecycle management (ILM) rules and policies. The ILM rules and policies instruct StorageGRID how to create and distribute copies of object data and how to manage those copies over time.

Designing and implementing ILM rules and the ILM policy requires careful planning. You must understand your operational requirements, the topology of your StorageGRID system, your object protection needs, and the available storage types. Then, you must determine how you want different types of objects to be copied, distributed, and stored.

- How ILM operates throughout an object's life
- What an ILM policy is
- What an ILM rule is
- Creating storage grades, storage pools, EC profiles, and regions
- Creating an ILM rule
- Creating an ILM policy
- Working with ILM rules and ILM policies

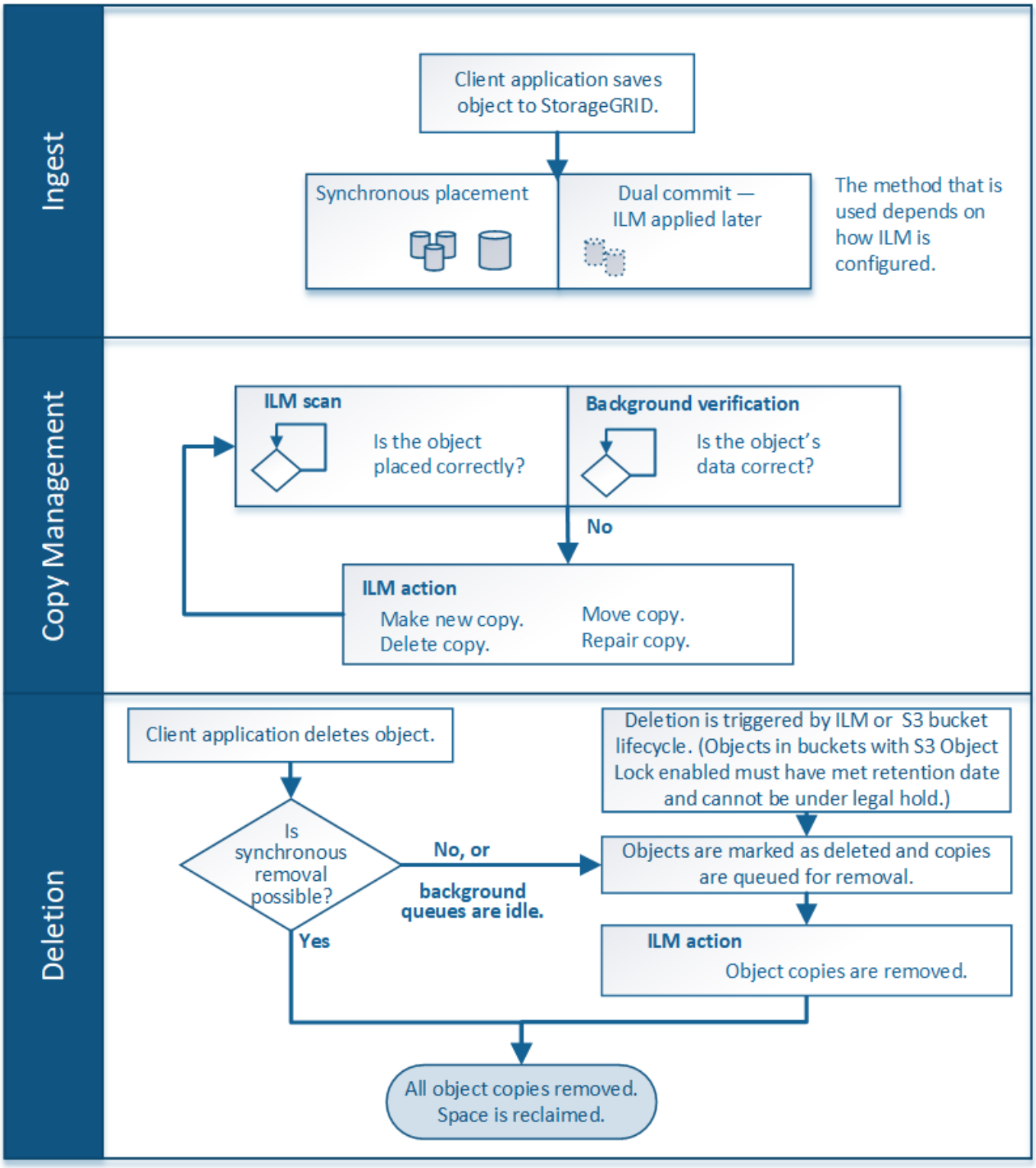
How ILM operates throughout an object's life

Understanding how StorageGRID uses ILM to manage objects during every stage of their life can help you design a more effective policy.

- **Ingest**: Ingest begins when an S3 or Swift client application establishes a connection to save an object to the StorageGRID system, and is complete when StorageGRID returns an "ingest successful" message to the client. Object data is protected during ingest either by applying ILM instructions immediately (synchronous placement) or by creating interim copies and applying ILM later (dual commit), depending on how the ILM requirements were specified.
- **Copy management**: After creating the number and type of object copies that are specified in the ILM's placement instructions, StorageGRID manages object locations and protects objects against loss.
  - ILM scanning and evaluation: StorageGRID continuously scans the list of objects stored in the grid and checks if the current copies meet ILM requirements. When different types, numbers, or locations of object copies are required, StorageGRID creates, deletes, or moves copies as needed.
  - Background verification: StorageGRID continuously performs background verification to check the integrity of object data. If a problem is found, StorageGRID automatically creates a new object copy or a replacement erasure-coded object fragment in a location that meets current ILM requirements. See the instructions for monitoring and troubleshooting StorageGRID.
- **Object deletion**: Management of an object ends when all copies are removed from the StorageGRID system. Objects can be removed as a result of a delete request by a client, or as a result of deletion by ILM or deletion caused by the expiration of an S3 bucket lifecycle.

> Objects in a bucket that has S3 Object Lock enabled cannot be deleted if they are under a legal hold or if a retain-until-date has been specified but not yet met.

The diagram summarizes how ILM operates throughout an object's lifecycle.



Related information

Monitor & troubleshoot

How objects are ingested

StorageGRID protects objects during ingest either by performing synchronous placement

or by performing dual commit, as specified in the ILM rule that matches the objects.

When an S3 or Swift client stores an object to the grid, StorageGRID ingests the object using one of these two methods:

- **Synchronous placement**: StorageGRID immediately creates all object copies that are needed to meet ILM requirements. StorageGRID sends an “ingest successful” message to the client when all copies are created.

  If StorageGRID cannot immediately create all object copies (for example, because a required location is temporarily unavailable), it either sends an “ingest failed” message to the client, or it falls back to creating interim object copies and evaluating ILM later, depending on the choice you made when you created the ILM rule.

- **Dual commit**: StorageGRID immediately creates two interim copies of the object, each on a different Storage Node, and sends an “ingest successful” message to the client. StorageGRID then queues the object for ILM evaluation.

  When StorageGRID performs the ILM evaluation, it first checks to see if the interim copies satisfy the placement instructions in the ILM rule. For example, the two interim copies might satisfy the instructions in a two-copy ILM rule, but they would not satisfy the instructions in an erasure-coding rule. If the interim copies do not satisfy the ILM instructions, StorageGRID creates new object copies and deletes any interim copies that are not needed.

  If StorageGRID cannot create two interim copies (for example, if a network issue prevents the second copy from being made), StorageGRID does not retry. Ingest fails.

  > S3 or Swift clients can specify that StorageGRID create a single interim copy at ingest by specifying `REDUCED_REDUNDANCY` for the storage class. See the instructions for implementing an S3 or Swift client for more information.

By default, StorageGRID uses synchronous placement to protect objects during ingest.

Related information

Data-protection options for ingest

Use S3

Use Swift

Data-protection options for ingest

When you create an ILM rule, you specify one of three options for protecting objects at ingest: Dual commit, Balanced, or Strict. Depending on your choice, StorageGRID makes interim copies and queues the objects for ILM evaluation later, or it uses synchronous placement and immediately makes copies to meet ILM requirements.

Dual commit

When you select the Dual commit option, StorageGRID immediately makes interim object copies on two different Storage Nodes and returns an “ingest successful” message to the client. The object is queued for ILM evaluation, and copies that meet the rule’s placement instructions are made later.

When to use the Dual commit option

Use the Dual commit option in either of these cases:

- You are using multi-site ILM rules and client ingest latency is your primary consideration. When using Dual commit, you must ensure your grid can perform the additional work of creating and removing the dual-commit copies if they do not satisfy ILM. Specifically:
  - The load on the grid must be low enough to prevent an ILM backlog.
  - The grid must have excess hardware resources (IOPS, CPU, memory, network bandwidth, and so on).
- You are using multi-site ILM rules and the WAN connection between the sites usually has high latency or limited bandwidth. In this scenario, using the Dual commit option can help prevent client timeouts. Before choosing the Dual commit option, you should test the client application with realistic workloads.

Strict

When you select the Strict option, StorageGRID uses synchronous placement on ingest and immediately makes all object copies specified in the rule's placement instructions. Ingest fails if StorageGRID cannot create all copies, for example, because a required storage location is temporarily unavailable. The client must retry the operation.

When to use the Strict option

Use the Strict option if you have an operational or regulatory requirement to immediately store objects only in the locations outlined in the ILM rule. For example, to satisfy a regulatory requirement, you might need to use the Strict option and a Location Constraint advanced filter to guarantee that objects are never stored at certain data center.

Example 5: ILM rules and policy for Strict ingest behavior

Balanced

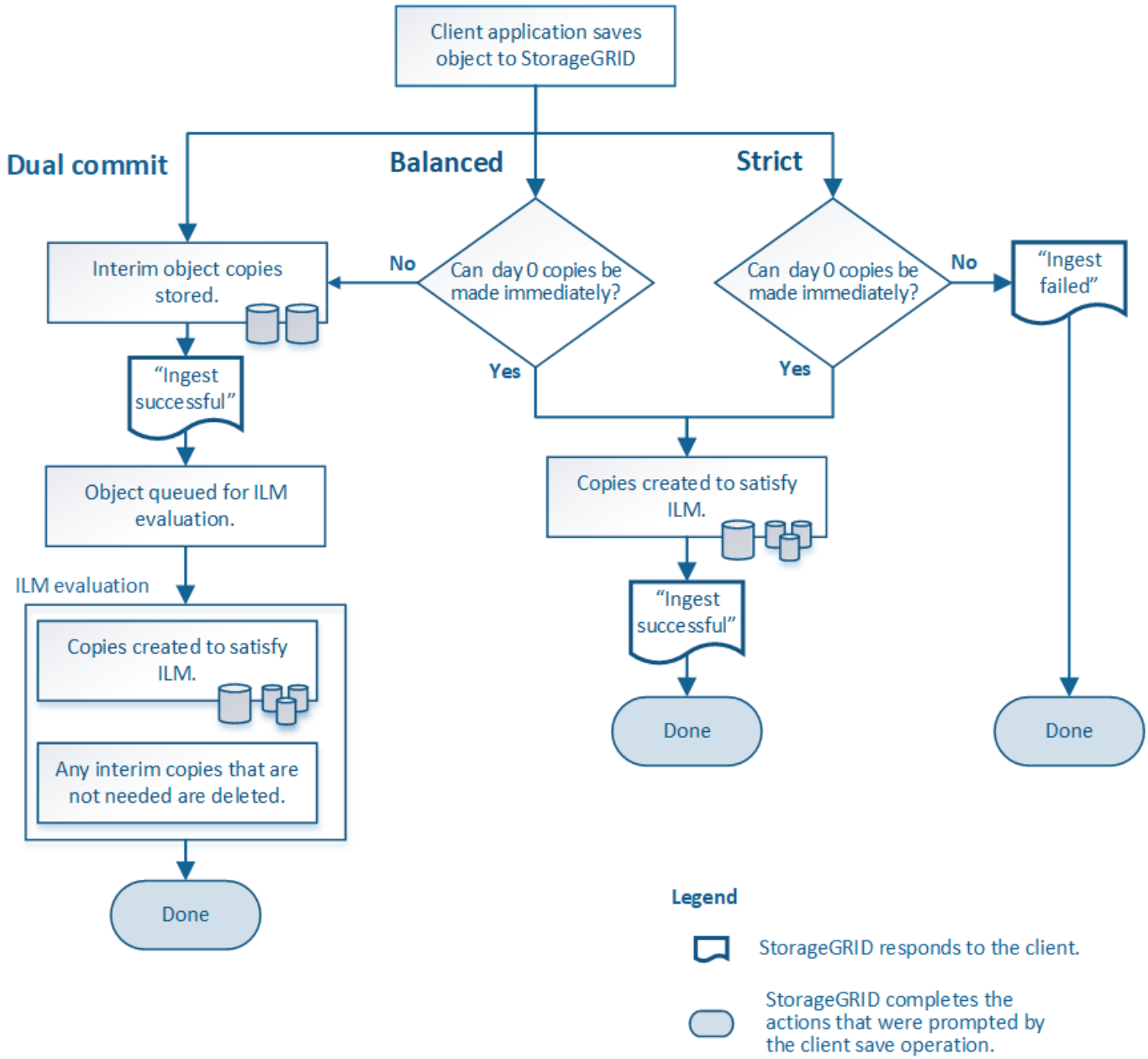
When you select the Balanced option, StorageGRID also uses synchronous placement on ingest and immediately makes all copies specified in the rule's placement instructions. In contrast with the Strict option, if StorageGRID cannot immediately make all copies, it uses Dual commit instead.

When to use the Balanced option

Use the Balanced option to achieve the best combination of data protection, grid performance, and ingest success. Balanced is the default option in the ILM rule wizard.

Flowchart of three ingest options

The flowchart shows what happens when objects are matched by an ILM rule that uses one of these ingest options.



Related information

How objects are ingested

Advantages, disadvantages, and limitations of the data-protection options

Understanding the advantages and disadvantages of each of the three options for protecting data at ingest (Balanced, Strict, or Dual commit) can help you decide which one to select for an ILM rule.

Advantages of the Balanced and Strict options

When compared to Dual commit, which creates interim copies during ingest, the two synchronous placement options can provide the following advantages:

- **Better data security**: Object data is immediately protected as specified in the ILM rule's placement instructions, which can be configured to protect against a wide variety of failure conditions, including the

failure of more than one storage location. Dual commit can only protect against the loss of a single local copy.

- **More efficient grid operation**: Each object is processed only once, as it is ingested. Because the StorageGRID system does not need to track or delete interim copies, there is less processing load and less database space is consumed.
- **(Balanced) Recommended**: The Balanced option provides optimal ILM efficiency. Using the Balanced option is recommended unless Strict ingest behavior is required or the grid meets all of the criteria for using for Dual commit.
- **(Strict) Certainty about object locations**: The Strict option guarantees that objects are immediately stored according to the placement instructions in the ILM rule.

Disadvantages of the Balanced and Strict options

When compared to Dual commit, the Balanced and Strict options have some disadvantages:

- **Longer client ingests**: Client ingest latencies might be longer. When you use the Balanced and Strict options, an “ingest successful” message is not returned to the client until all erasure-coded fragments or replicated copies are created and stored. However, object data will most likely reach its final placement much faster.
- **(Strict) Higher rates of ingest failure**: With the Strict option, ingest fails whenever StorageGRID cannot immediately make all copies specified in the ILM rule. You might see high rates of ingest failure if a required storage location is temporarily offline or if network issues cause delays in copying objects between sites.
- **(Strict) S3 multipart upload placements might not be as expected in some circumstances**: With Strict, you expect objects either to be placed as described by the ILM rule or for ingest to fail. However, with an S3 multipart upload, ILM is evaluated for each part of the object as it ingested, and for the object as a whole when the multipart upload completes. In the following circumstances this might result in placements that are different than you expect:
  - **If ILM changes while an S3 multipart upload is in progress**: Because each part is placed according to the rule that is active when the part is ingested, some parts of the object might not meet current ILM requirements when the multipart upload completes. In these cases, ingest of the object does not fail. Instead, any part that is not placed correctly is queued for ILM re-evaluation, and is moved to the correct location later.
  - **When ILM rules filter on size**: When evaluating ILM for a part, StorageGRID filters on the size of the part, not the size of the object. This means that parts of an object can be stored in locations that do not meet ILM requirements for the object as a whole. For example, if a rule specifies that all objects 10 GB or larger are stored at DC1 while all smaller objects are stored at DC2, at ingest each 1 GB part of a 10-part multipart upload is stored at DC2. When ILM is evaluated for the object, all parts of the object are moved to DC1.
- **(Strict) Ingest does not fail when object tags or metadata are updated and newly required placements cannot be made**: With Strict, you expect objects either to be placed as described by the ILM rule or for ingest to fail. However, when you update metadata or tags for an object that is already stored in the grid, the object is not re-ingested. This means that any changes to object placement that are triggered by the update are not made immediately. Placement changes are made when ILM is re-evaluated by normal background ILM processes. If required placement changes cannot be made (for example, because a newly required location is unavailable), the updated object retains its current placement until the placement changes are possible.

Limitations on object placements with the Balanced or Strict options

The Balanced or Strict options cannot be used for ILM rules that have any of these placement instructions:

- Placement in a Cloud Storage Pool at day 0.
- Placement in an Archive Node at day 0.
- Placements in a Cloud Storage Pool or an Archive Node when the rule has a User Defined Creation Time as its Reference Time.

These restrictions exist because StorageGRID cannot synchronously make copies to a Cloud Storage Pool or an Archive Node, and a User Defined Creation Time could resolve to the present.

How ILM rules and consistency controls interact to affect data protection

Both your ILM rule and your choice of consistency control affect how objects are protected. These settings can interact.

For example, the ingest behavior selected for an ILM rule affects the initial placement of object copies, while the consistency control used when an object is stored affects the initial placement of object metadata. Because StorageGRID requires access to both an object's metadata and its data to fulfill client requests, selecting matching levels of protection for the consistency level and ingest behavior can provide better initial data protection and more predictable system responses.

Here is a brief summary of the consistency controls that are available in StorageGRID:

- **all**: All nodes receive object metadata immediately or the request will fail.
- **strong-global**: Object metadata is immediately distributed to all sites. Guarantees read-after-write consistency for all client requests across all sites.
- **strong-site**: Object metadata is immediately distributed to other nodes at the site. Guarantees read-after-write consistency for all client requests within a site.
- **read-after-new-write**: Provides read-after-write consistency for new objects and eventual consistency for object updates. Offers high availability and data protection guarantees.
- **available** (eventual consistency for HEAD operations): Behaves the same as the "read-after-new-write" consistency level, but only provides eventual consistency for HEAD operations.

> Before selecting a consistency level, read the full description of these settings in the instructions for creating an S3 or Swift client application. You should understand the benefits and limitations before changing the default value.

Example of how the consistency control and ILM rule can interact

Suppose you have a two-site grid with the following ILM rule and the following consistency level setting:

- **ILM rule**: Create two object copies, one at the local site and one at a remote site. The Strict ingest behavior is selected.
- **Consistency level**: "strong-global" (Object metadata is immediately distributed to all sites.)

When a client stores an object to the grid, StorageGRID makes both object copies and distributes metadata to both sites before returning success to the client.

The object is fully protected against loss at the time of the ingest successful message. For example, if the local site is lost shortly after ingest, copies of both the object data and the object metadata still exist at the remote site. The object is fully retrievable.

If you instead used the same ILM rule and the "strong-site" consistency level, the client might receive a

success message after object data is replicated to the remote site but before object metadata is distributed there. In this case, the level of protection of object metadata does not match the level of protection for object data. If the local site is lost shortly after ingest, object metadata is lost. The object cannot be retrieved.

The inter-relationship between consistency levels and ILM rules can be complex. Contact NetApp if you require assistance.

Related information

What replication is

What erasure coding is

What erasure-coding schemes are

Example 5: ILM rules and policy for Strict ingest behavior

Use S3

Use Swift

How objects are stored (replication or erasure coding)

StorageGRID can protect objects against loss either by storing replicated copies or by storing erasure-coded copies. You specify the type of copies to create in the placement instructions of ILM rules.

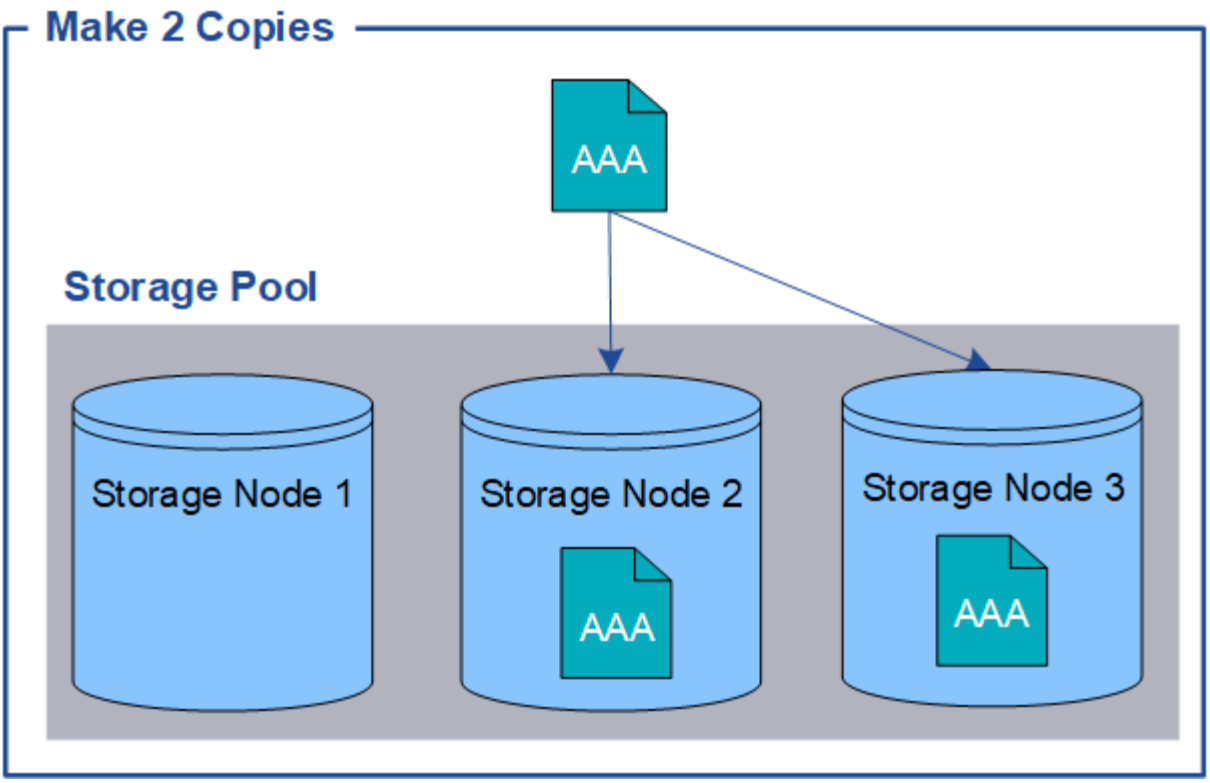
- What replication is
- Why you should not use single-copy replication
- What erasure coding is
- What erasure-coding schemes are
- Advantages, disadvantages, and requirements for erasure coding

What replication is

Replication is one of two methods used by StorageGRID to store object data. When objects match an ILM rule that uses replication, the system creates exact copies of object data and stores the copies on Storage Nodes or Archive Nodes.

When you configure an ILM rule to create replicated copies, you specify how many copies should be created, where those copies should be placed, and how long the copies should be stored at each location.

In the following example, the ILM rule specifies that two replicated copies of each object be placed in a storage pool that contains three Storage Nodes.



When StorageGRID matches objects to this rule, it creates two copies of the object, placing each copy on a different Storage Node in the storage pool. The two copies might be placed on any two of the three available Storage Nodes. In this case, the rule placed object copies on Storage Nodes 2 and 3. Because there are two copies, the object can be retrieved if any of the nodes in the storage pool fails.

> StorageGRID can store only one replicated copy of an object on any given Storage Node. If your grid includes three Storage Nodes and you create a 4-copy ILM rule, only three copies will be made—one copy for each Storage Node. The **ILM placement unachievable** alert is triggered to indicate that the ILM rule could not be completely applied.

Related information

What a storage pool is

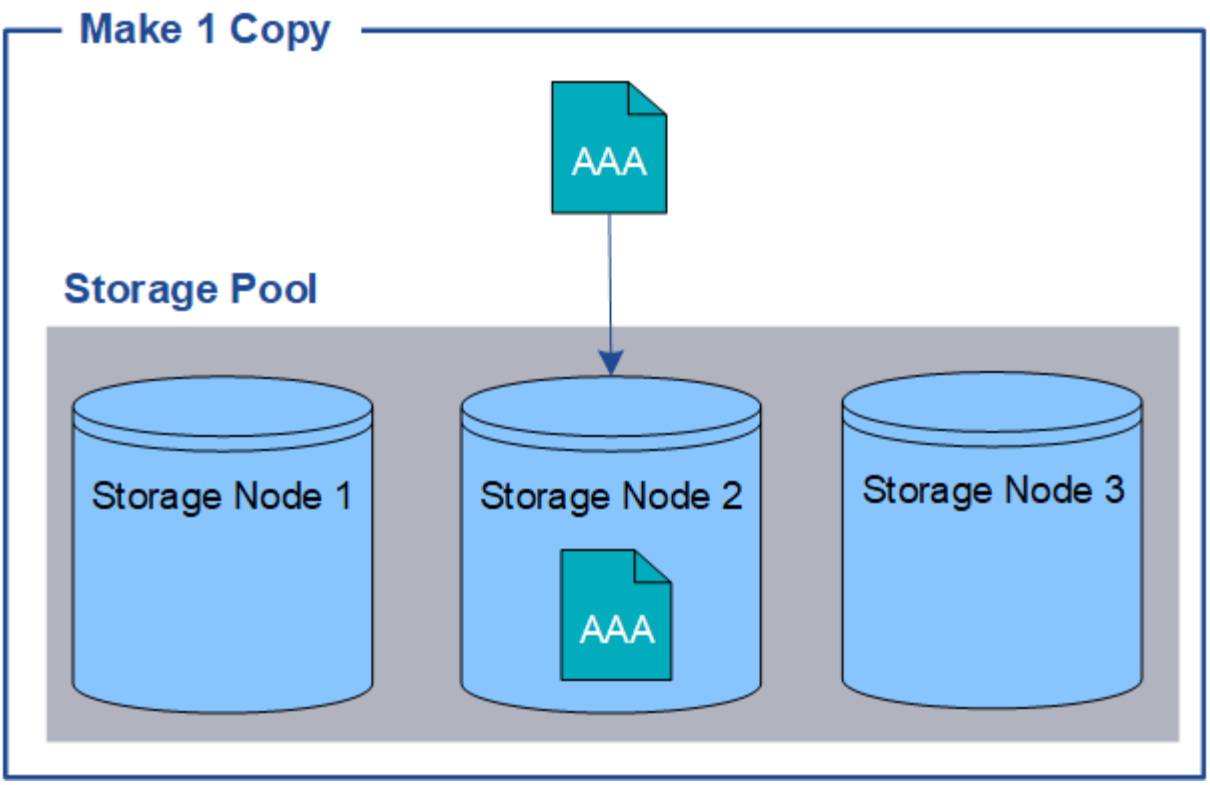
Using multiple storage pools for cross-site replication

Why you should not use single-copy replication

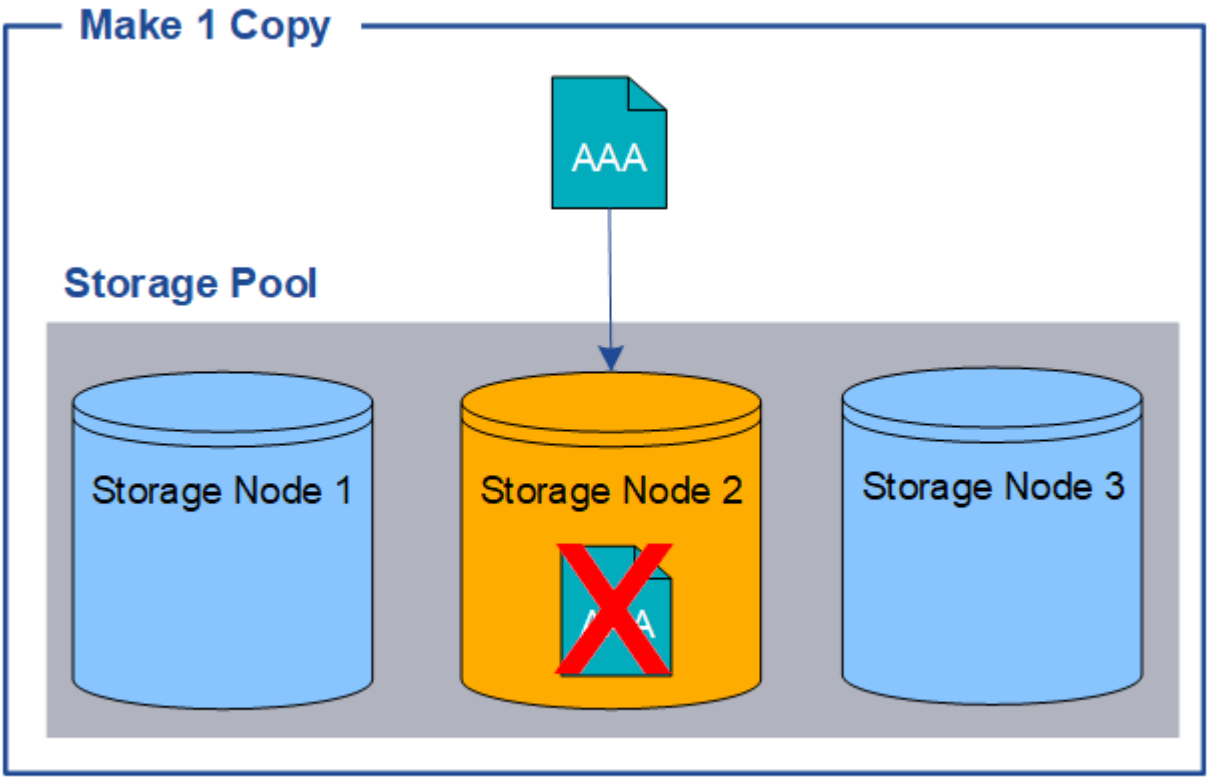
When creating an ILM rule to create replicated copies, you should always specify at least two copies for any time period in the placement instructions.

> Do not use an ILM rule that creates only one replicated copy for any time period. If only one replicated copy of an object exists, that object is lost if a Storage Node fails or has a significant error. You also temporarily lose access to the object during maintenance procedures such as upgrades.

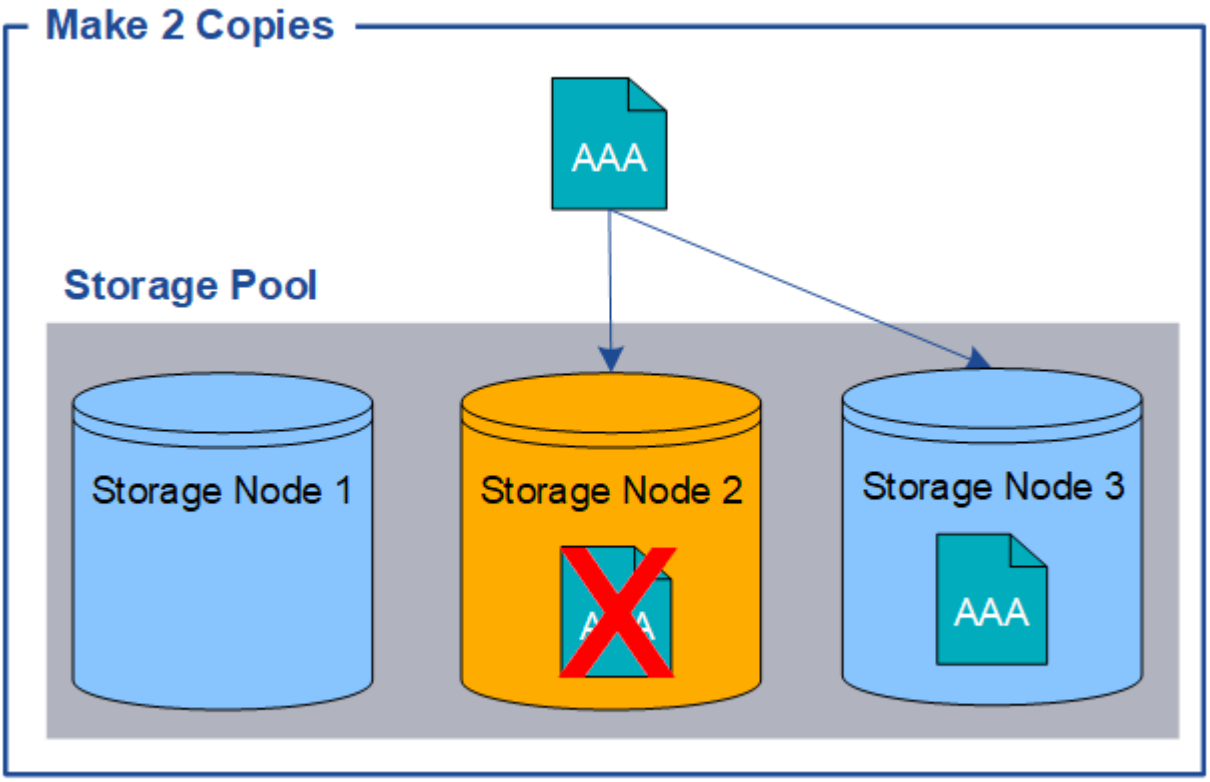
In the following example, the Make 1 Copy ILM rule specifies that one replicated copy of an object be placed in a storage pool that contains three Storage Nodes. When an object is ingested that matches this rule, StorageGRID places a single copy on only one Storage Node.



When an ILM rule creates only one replicated copy of an object, the object becomes inaccessible when the Storage Node is unavailable. In this example, you will temporarily lose access to object AAA whenever Storage Node 2 is offline, such as during an upgrade or other maintenance procedure. You will lose object AAA entirely if Storage Node 2 fails.



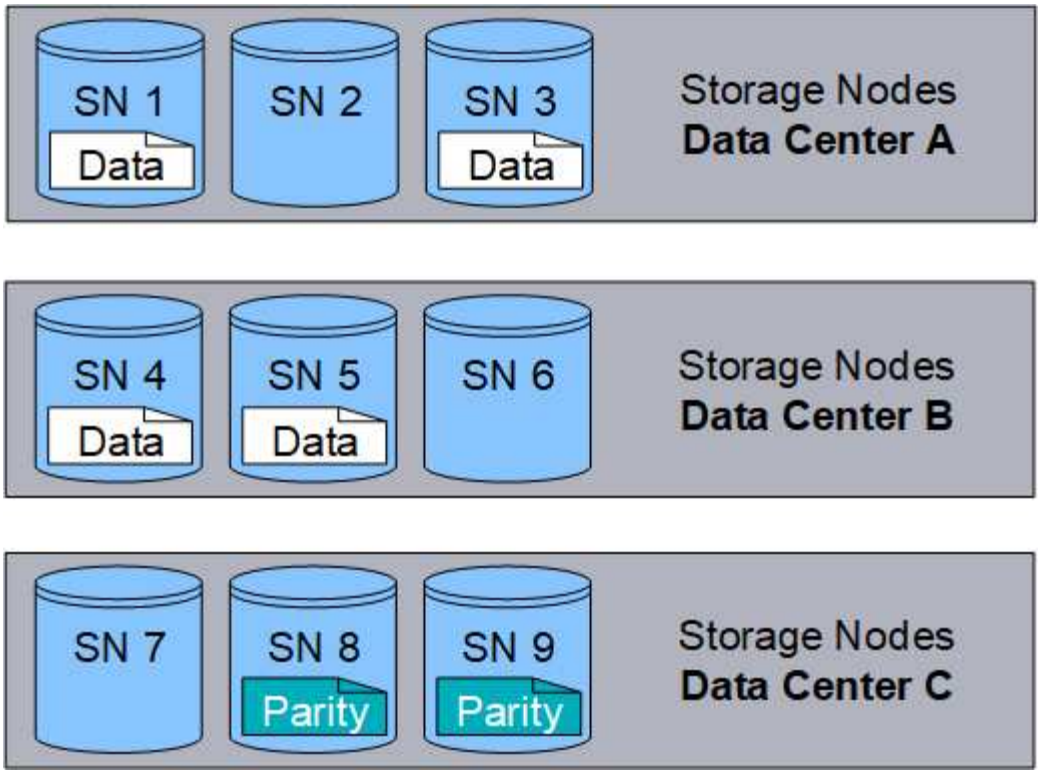
To avoid losing object data, you should always make at least two copies of all objects you want to protect with replication. If two or more copies exist, you can still access the object if one Storage Node fails or goes offline.



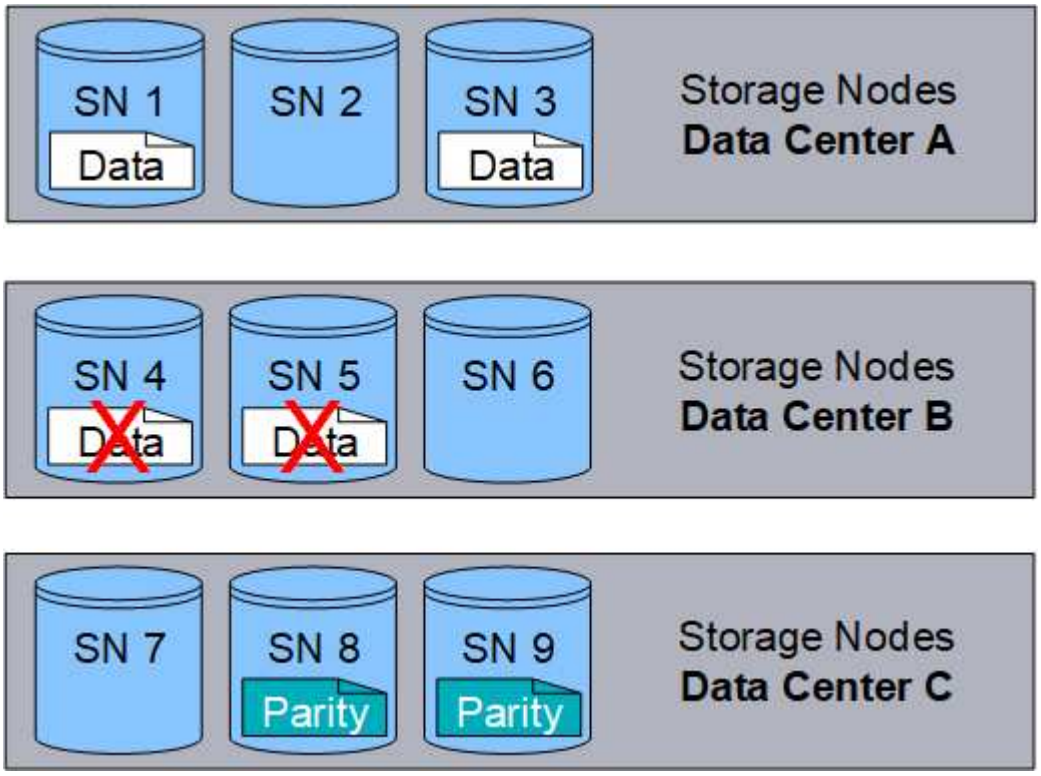
What erasure coding is

Erasure coding is the second method used by StorageGRID to store object data. When StorageGRID matches objects to an ILM rule that is configured to create erasure-coded copies, it slices object data into data fragments, computes additional parity fragments, and stores each fragment on a different Storage Node. When an object is accessed, it is reassembled using the stored fragments. If a data or a parity fragment becomes corrupt or lost, the erasure-coding algorithm can recreate that fragment using a subset of the remaining data and parity fragments.

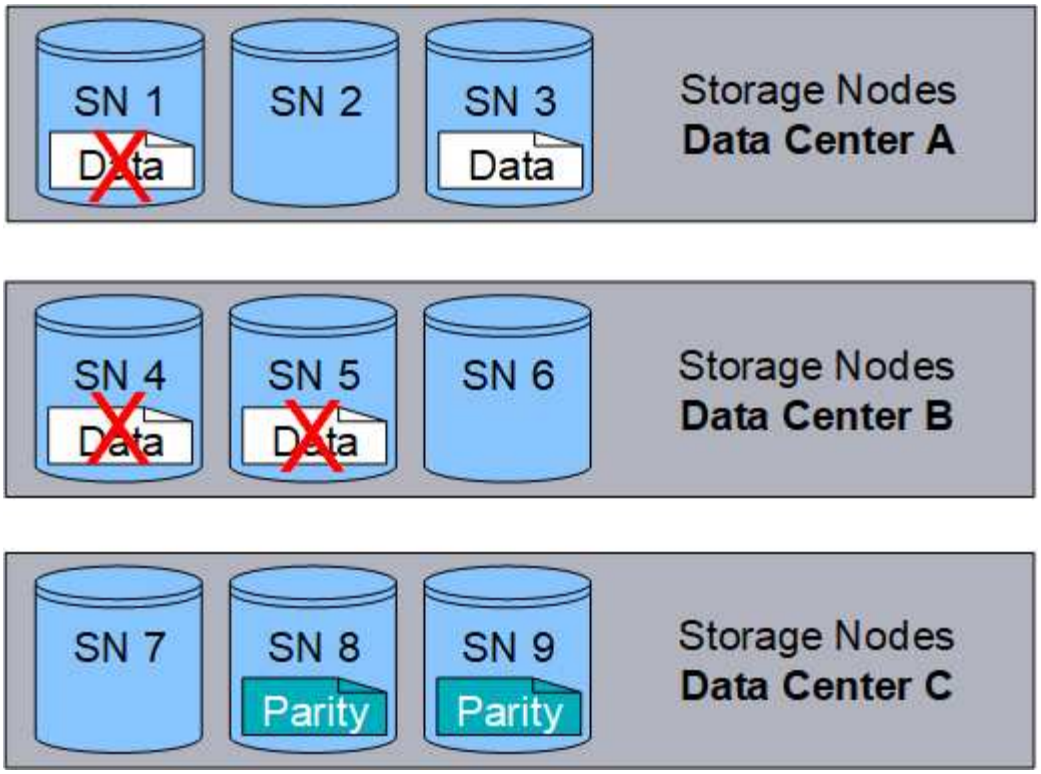
The following example illustrates the use of an erasure-coding algorithm on an object's data. In this example, the ILM rule uses a 4+2 erasure-coding scheme. Each object is sliced into four equal data fragments, and two parity fragments are computed from the object data. Each of the six fragments is stored on a different node across three data center sites to provide data protection for node failures or site loss.



The 4+2 erasure-coding scheme requires a minimum of nine Storage Nodes, with three Storage Nodes at each of three different sites. An object can be retrieved as long as any four of the six fragments (data or parity) remain available. Up to two fragments can be lost without loss of the object data. If an entire data center site is lost, the object can still be retrieved or repaired, as long as all of the other fragments remain accessible.



If more than two Storage Nodes are lost, the object is not retrievable.



Related information

What a storage pool is

What erasure-coding schemes are

Configuring Erasure Coding profiles

What erasure-coding schemes are

When you configure the Erasure Coding profile for an ILM rule, you select an available erasure-coding scheme based on how many Storage Nodes and sites make up the storage pool you plan to use. Erasure-coding schemes control how many data fragments and how many parity fragments are created for each object.

The StorageGRID system uses the Reed-Solomon erasure-coding algorithm. The algorithm slices an object into k data fragments and computes m parity fragments. The k + m = n fragments are spread across n Storage Nodes to provide data protection. An object can sustain up to m lost or corrupt fragments. k fragments are needed to retrieve or repair an object.

When configuring an Erasure Coding profile, use the following guidelines for storage pools:

- The storage pool must include three or more sites, or exactly one site.

  > You cannot configure an Erasure Coding profile if the storage pool includes two sites.

  - Erasure-coding schemes for storage pools containing three or more sites
  - Erasure-coding schemes for one-site storage pools
- Do not use the default storage pool, All Storage Nodes, or a storage pool that includes the default site, All Sites.

- The storage pool should include at least *k*+*m* +1 Storage Nodes.

  The minimum number of Storage Nodes required is *k*+*m*. However, having at least one additional Storage Node can help prevent ingest failures or ILM backlogs if a required Storage Node is temporarily unavailable.

The storage overhead of an erasure-coding scheme is calculated by dividing the number of parity fragments (*m*) by the number of data fragments (*k*). You can use the storage overhead to calculate how much disk space each erasure-coded object requires:

```
disk space = object size + (object size * storage overhead)
```

For example, if you store a 10 MB object using the 4+2 scheme (which has 50% storage overhead), the object consumes 15 MB of grid storage. If you store the same 10 MB object using the 6+2 scheme (which has 33% storage overhead), the object consumes approximately 13.3 MB.

Select the erasure-coding scheme with the lowest total value of *k*+*m* that meets your needs. erasure-coding schemes with a lower number of fragments are overall more computationally efficient, as fewer fragments are created and distributed (or retrieved) per object, can show better performance due to the larger fragment size, and can require fewer nodes be added in an expansion when more storage is required. (See the instructions for expanding StorageGRID for information on planning a storage expansion.)

Erasure-coding schemes for storage pools containing three or more sites

The following table describes the erasure-coding schemes currently supported by StorageGRID for storage pools that include three or more sites. All of these schemes provide site loss protection. One site can be lost, and the object will still be accessible.

For erasure-coding schemes that provide site loss protection, the recommended number of Storage Nodes in the storage pool exceeds *k*+*m*+1 because each site requires a minimum of three Storage Nodes.

Erasure-coding scheme (*k*+*m*)	Minimum number of deployed sites	Recommended number of Storage Nodes at each site	Total recommended number of Storage Nodes	Site loss protection?	Storage overhead
4+2	3	3	9	Yes	50%
6+2	4	3	12	Yes	33%
8+2	5	3	15	Yes	25%
6+3	3	4	12	Yes	50%
9+3	4	4	16	Yes	33%
2+1	3	3	9	Yes	50%
4+1	5	3	15	Yes	25%
6+1	7	3	21	Yes	17%

Erasure-coding scheme (*k*+*m*)	Minimum number of deployed sites	Recommended number of Storage Nodes at each site	Total recommended number of Storage Nodes	Site loss protection?	Storage overhead
7+5	3	5	15	Yes	71%

> StorageGRID requires a minimum of three Storage Nodes per site. To use the 7+5 scheme, each site requires a minimum of four Storage Nodes. Using five Storage Nodes per site is recommended.

When selecting an erasure-coding scheme that provides site protection, balance the relative importance of the following factors:

- **Number of fragments**: Performance and expansion flexibility are generally better when the total number of fragments is lower.
- **Fault tolerance**: Fault tolerance is increased by having more parity segments (that is, when *m* has a higher value.)
- **Network traffic**: When recovering from failures, using a scheme with more fragments (that is, a higher total for *k*+*m*) creates more network traffic.
- **Storage overhead**: Schemes with higher overhead require more storage space per object.

For example, when deciding between a 4+2 scheme and 6+3 scheme (which both have 50% storage overhead), select the 6+3 scheme if additional fault tolerance is required. Select the 4+2 scheme if network resources are constrained. If all other factors are equal, select 4+2 because it has a lower total number of fragments.

> If you are unsure of which scheme to use, select 4+2 or 6+3, or contact technical support.

Erasure-coding schemes for one-site storage pools

A one-site storage pool supports all of the erasure-coding schemes defined for three or more sites, provided that the site has enough Storage Nodes.

The minimum number of Storage Nodes required is *k*+*m*, but a storage pool with *k*+*m*+1 Storage Nodes is recommended. For example, the 2+1 erasure-coding scheme requires a storage pool with a minimum of three Storage Nodes, but four Storage Nodes is recommended.

Erasure-coding scheme (*k*+*m*)	Minimum number of Storage Nodes	Recommended number of Storage Nodes	Storage overhead
4+2	6	7	50%
6+2	8	9	33%
8+2	10	11	25%
6+3	9	10	50%

Erasure-coding scheme (*k*+*m*)	Minimum number of Storage Nodes	Recommended number of Storage Nodes	Storage overhead
9+3	12	13	33%
2+1	3	4	50%
4+1	5	6	25%
6+1	7	8	17%
7+5	12	13	71%

Related information

Expand your grid

Advantages, disadvantages, and requirements for erasure coding

Before deciding whether to use replication or erasure coding to protect object data from loss, you should understand the advantages, disadvantages, and the requirements for erasure coding.

Advantages of erasure coding

When compared to replication, erasure coding offers improved reliability, availability, and storage efficiency.

- **Reliability**: Reliability is gauged in terms of fault tolerance—that is, the number of simultaneous failures that can be sustained without loss of data. With replication, multiple identical copies are stored on different nodes and across sites. With erasure coding, an object is encoded into data and parity fragments and distributed across many nodes and sites. This dispersal provides both site and node failure protection. When compared to replication, erasure coding provides improved reliability at comparable storage costs.
- **Availability**: Availability can be defined as the ability to retrieve objects if Storage Nodes fail or become inaccessible. When compared to replication, erasure coding provides increased availability at comparable storage costs.
- **Storage efficiency**: For similar levels of availability and reliability, objects protected through erasure coding consume less disk space than the same objects would if protected through replication. For example, a 10 MB object that is replicated to two sites consumes 20 MB of disk space (two copies), while an object that is erasure coded across three sites with a 6+3 erasure-coding scheme only consumes 15 MB of disk space.

> Disk space for erasure-coded objects is calculated as the object size plus the storage overhead. The storage overhead percentage is the number of parity fragments divided by the number of data fragments.

Disadvantages of erasure coding

When compared to replication, erasure coding has the following disadvantages:

- An increased number of Storage Nodes and sites is required. For example, if you use an erasure-coding

scheme of 6+3, you must have at least three Storage Nodes at three different sites. In contrast, if you simply replicate object data, you require only one Storage Node for each copy.

- Increased cost and complexity of storage expansions. To expand a deployment that uses replication, you simply add storage capacity in every location where object copies are made. To expand a deployment that uses erasure coding, you must consider both the erasure-coding scheme in use and how full existing Storage Nodes are. For example, if you wait until existing nodes are 100% full, you must add at least *k+m* Storage Nodes, but if you expand when existing nodes are 70% full, you can add two nodes per site and still maximize usable storage capacity. For more information, see the instructions for expanding StorageGRID.
- There are increased retrieval latencies when you use erasure coding across geographically distributed sites. The object fragments for an object that is erasure coded and distributed across remote sites take longer to retrieve over WAN connections than an object that is replicated and available locally (the same site to which the client connects).
- When you use erasure coding across geographically distributed sites, there is higher WAN network traffic usage for retrievals and repairs, especially for frequently retrieved objects or for object repairs over WAN network connections.
- When you use erasure coding across sites, the maximum object throughput declines sharply as network latency between sites increases. This decrease is due to the corresponding decrease in TCP network throughput, which affects how quickly the StorageGRID system can store and retrieve object fragments.
- Higher usage of compute resources.

When to use erasure coding

Erasure coding is best suited for the following requirements:

- Objects larger than 1 MB in size.

> Due to the overhead of managing the number of fragments associated with an erasure-coded copy, do not use erasure coding for objects 200 KB or smaller.

- Long-term or cold storage for infrequently retrieved content.
- High data availability and reliability.
- Protection against complete site and node failures.
- Storage efficiency.
- Single-site deployments that require efficient data protection with only a single erasure-coded copy rather than multiple replicated copies.
- Multiple-site deployments where the inter-site latency is less than 100 ms.

Related information

Expand your grid

How object retention is determined

StorageGRID provides options for both grid administrators and individual tenant users to specify how long to store objects. In general, any retention instructions provided by a tenant user take precedence over the retention instructions provided by the grid administrator.

How tenant users control object retention

Tenant users have three primary ways to control how long their objects are stored in StorageGRID:

- If the global S3 Object Lock setting is enabled for the grid, S3 tenant users can create buckets with S3 Object Lock enabled and then use the S3 REST API to specify retain-until-date and legal hold settings for each object version added to that bucket.
  - An object version that is under a legal hold cannot be deleted by any method.
  - Before an object version's retain-until-date is reached, that version cannot be deleted by any method.
  - Objects in buckets with S3 Object Lock enabled are retained by ILM "forever." However, after its retain-until-date is reached, an object version can be deleted by a client request or the expiration of the bucket lifecycle.

    Managing objects with S3 Object Lock

- S3 tenant users can add a lifecycle configuration to their buckets that specifies an Expiration action. If a bucket lifecycle exists, StorageGRID stores an object until the date or number of days specified in the Expiration action are met, unless the client deletes the object first.
- An S3 or Swift client can issue a delete object request. StorageGRID always prioritizes client delete requests over S3 bucket lifecycle or ILM when determining whether to delete or retain an object.

How grid administrators control object retention

Grid administrators use ILM placement instructions to control how long objects are stored. When objects are matched by an ILM rule, StorageGRID stores those objects until the last time period in the ILM rule has elapsed. Objects are retained indefinitely if "forever" is specified for the placement instructions.

Regardless of who controls how long objects are retained, ILM settings control what types of object copies (replicated or erasure coded) are stored and where the copies are located (Storage Nodes, Cloud Storage Pools, or Archive Nodes).

How S3 bucket lifecycle and ILM interact

The Expiration action in an S3 bucket lifecycle always overrides ILM settings. As a result, an object might be retained on the grid even after any ILM instructions for placing the object have lapsed.

Examples for object retention

To better understand the interactions between S3 Object Lock, bucket lifecycle settings, client delete requests, and ILM, consider the following examples.

Example 1: S3 bucket lifecycle keeps objects longer than ILM

ILM

Store two copies for 1 year (365 days)

Bucket lifecycle

Expire objects in 2 years (730 days)

Result

StorageGRID stores the object for 730 days. StorageGRID uses the bucket lifecycle settings to determine whether to delete or retain an object.

> If the bucket lifecycle specifies that objects should be kept longer than specified by ILM, StorageGRID continues to use the ILM placement instructions when determining the number and type of copies to store. In this example, two copies of the object will continue to be stored in StorageGRID from days 366 to 730.

Example 2: S3 bucket lifecycle expires objects before ILM

ILM

Store two copies for 2 years (730 days)

Bucket lifecycle

Expire objects in 1 year (365 days)

Result

StorageGRID deletes both copies of the object after day 365.

Example 3: Client delete overrides bucket lifecycle and ILM

ILM

Store two copies on Storage Nodes “forever”

Bucket lifecycle

Expire objects in 2 years (730 days)

Client delete request

Issued on day 400

Result

StorageGRID deletes both copies of the object on day 400 in response to the client delete request.

Example 4: S3 Object Lock overrides client delete request

S3 Object Lock

Retain-until-date for an object version is 2026-03-31. A legal hold is not in effect.

Compliant ILM rule

Store two copies on Storage Nodes “forever.”

Client delete request

Issued on 2024-03-31.

Result

StorageGRID will not delete the object version because the retain-until-date is still 2 years away.

Related information

Managing objects with S3 Object Lock

Use S3

What ILM rule placement instructions are

How objects are deleted

StorageGRID can delete objects either in direct response to a client request or automatically as a result of the expiration of an S3 bucket lifecycle or the requirements of the ILM policy. Understanding the different ways that objects can be deleted and how StorageGRID handles delete requests can help you manage objects more effectively.

StorageGRID can use one of two methods to delete objects:

- Synchronous deletion: When StorageGRID receives a client delete request, all object copies are removed immediately. The client is informed that deletion was successful after the copies have been removed.
- Objects are queued for deletion: When StorageGRID receives a delete request, the object is queued for deletion and the client is informed immediately that deletion was successful. Object copies are removed later by background ILM processing.

When deleting objects, StorageGRID uses the method that optimizes delete performance, minimizes potential delete backlogs, and frees space most quickly.

The table summarizes when StorageGRID uses each method.

Method of performing deletion	When used
Objects are queued for deletion	When **any** of the following conditions are true: • Automatic object deletion has been triggered by one of the following events: ◦ The expiration date or number of days in the lifecycle configuration for an S3 bucket is reached. ◦ The last time period specified in an ILM rule elapses. **Note:** Objects in a bucket that has S3 Object Lock enabled cannot be deleted if they are under a legal hold or if a retain-until-date has been specified but not yet met. • An S3 or Swift client requests deletion and one or more of these conditions is true: ◦ Copies cannot be deleted within 30 seconds because, for example, an object location is temporarily unavailable. ◦ Background deletion queues are idle.
Objects are removed immediately (synchronous deletion)	When an S3 or Swift client makes a delete request and **all** of the following conditions are met: • All copies can be removed within 30 seconds. • Background deletion queues contain objects to process.

When S3 or Swift clients make delete requests, StorageGRID begins by adding a number of objects to the delete queue. It then switches to performing synchronous deletion. Making sure that the background deletion queue has objects to process allows StorageGRID to process deletes more efficiently, especially for low concurrency clients, while helping to prevent client delete backlogs.

Understanding the impact of how StorageGRID deletes objects

The way that StorageGRID deletes objects can affect how the system appears to perform:

- When StorageGRID performs synchronous deletion, it can take StorageGRID up to 30 seconds to return a result to the client. This means that deletion can appear to be happening more slowly, even though copies are actually being removed more quickly than they are when StorageGRID queues objects for deletion.
- If you are closely monitoring delete performance during a bulk delete, you might notice that the deletion rate appears to slow after a certain number of objects have been deleted. This change occurs when StorageGRID shifts from queuing objects for deletion to performing synchronous deletion. The apparent reduction in the deletion rate does not mean that object copies are being removed more slowly. On the contrary, it indicates that on average, space is now being freed more quickly.

If you are deleting large numbers of objects and your priority is to free space quickly, consider using a client request to delete objects rather than deleting them using ILM or other methods. In general, space is freed more quickly when deletion is performed by clients because StorageGRID can use synchronous deletion.

You should be aware that the amount of time required to free space after an object is deleted depends on a number of factors:

- Whether object copies are synchronously removed or are queued for removal later (for client delete requests).
- Other factors such as the number of objects in the grid or the availability of grid resources when object copies are queued for removal (for both client deletes and other methods).

How S3 versioned objects are deleted

When versioning is enabled for an S3 bucket, StorageGRID follows Amazon S3 behavior when responding to delete requests, whether those requests come from an S3 client, the expiration of an S3 bucket lifecycle, or the requirements of the ILM policy.

When objects are versioned, object delete requests do not delete the current version of the object and do not free space. Instead, an object delete request simply creates a delete marker as the current version of the object, which makes the previous version of the object “noncurrent.”

Even though the object has not been removed, StorageGRID behaves as though the current version of the object is no longer available. Requests to that object return 404 NotFound. However, because noncurrent object data has not been removed, requests that specify a noncurrent version of the object can succeed.

To free space when deleting versioned objects, you must do one of the following:

- **S3 client request**: Specify the object version number in the S3 DELETE Object request (`DELETE /object?versionId=ID`). Keep in mind that this request only removes object copies for the specified version (the other versions are still taking up space).
- **Bucket lifecycle**: Use the `NoncurrentVersionExpiration` action in the bucket lifecycle configuration. When the number of NoncurrentDays specified is met, StorageGRID permanently removes all copies of noncurrent object versions. These object versions cannot be recovered.
- **ILM**: Add two ILM rules to your ILM policy. Use **Noncurrent Time** as the Reference Time in the first rule to match the noncurrent versions of the object. Use **Ingest Time** in the second rule to match the current version. The **Noncurrent Time** rule must appear in the policy above the **Ingest Time** rule.

Related information

What an ILM policy is

An information lifecycle management (ILM) policy is an ordered set of ILM rules that determines how the StorageGRID system manages object data over time.

How an ILM policy evaluates objects

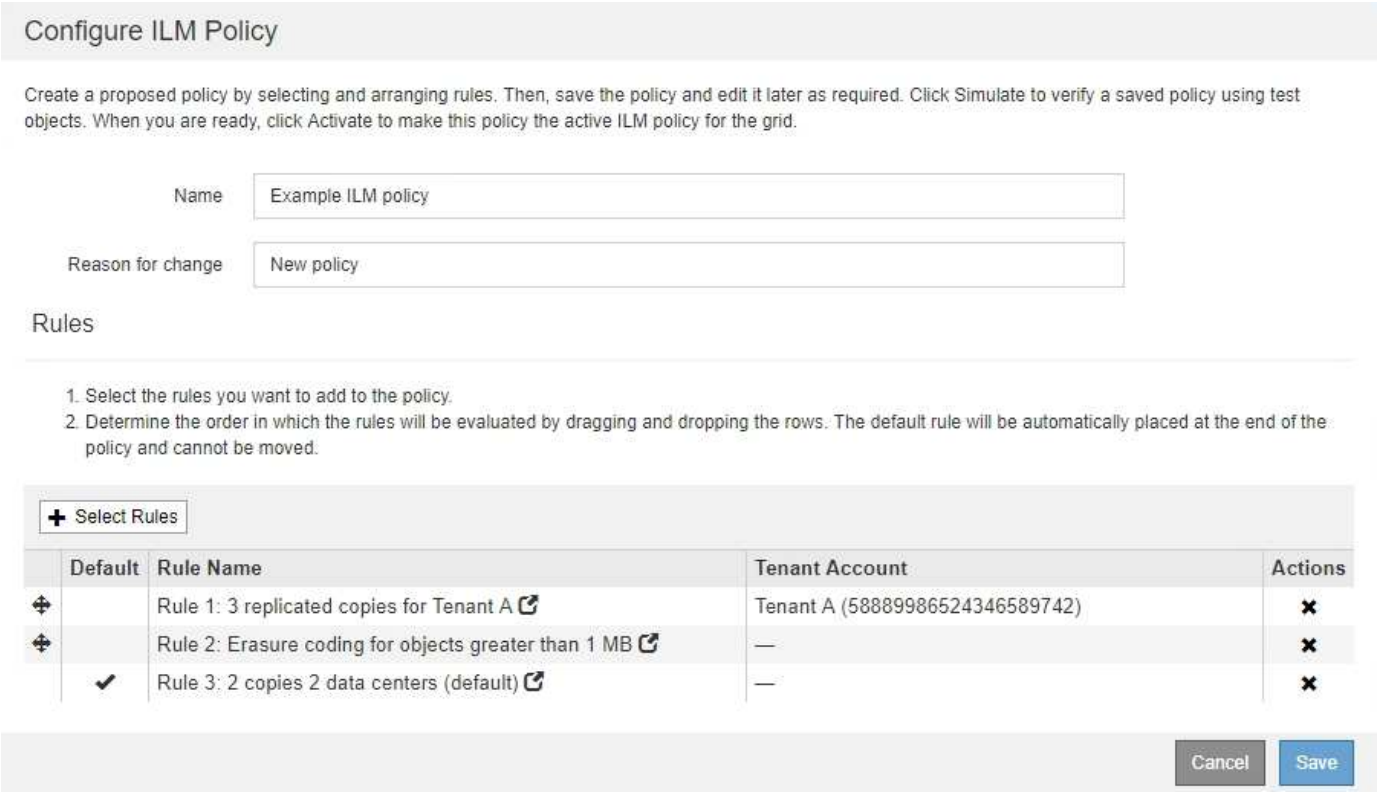
The active ILM policy for your StorageGRID system controls the placement, duration, and data protection of all objects.

When clients save objects to StorageGRID, the objects are evaluated against the ordered set of ILM rules in the active policy, as follows:

1. If the filters for the first rule in the policy match an object, the object is ingested according to that rule's ingest behavior and stored according to that rule's placement instructions.
2. If the filters for the first rule do not match the object, the object is evaluated against each subsequent rule in the policy until a match is made.
3. If no rules match an object, the ingest behavior and placement instructions for the default rule in the policy are applied. The default rule is the last rule in a policy and cannot use any filters.

Example ILM policy

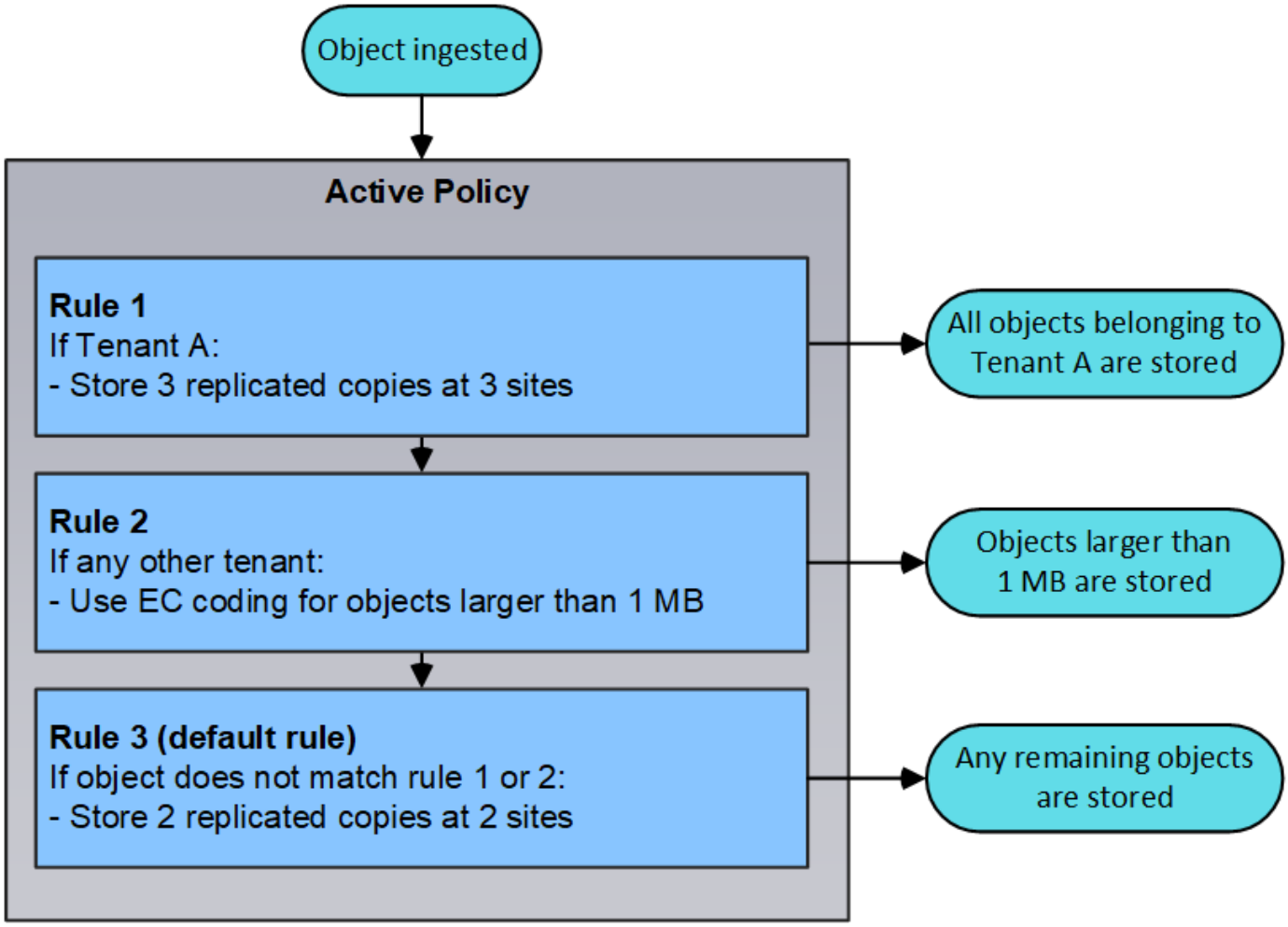
This example ILM policy uses three ILM rules.



In this example, Rule 1 matches all objects belonging to Tenant A. These objects are stored as three replicated copies at three sites. Objects belonging to other tenants are not matched by Rule 1, so they are evaluated against Rule 2.

Rule 2 matches all objects from other tenants but only if they are larger than 1 MB. These larger objects are stored using 6+3 erasure coding at three sites. Rule 2 does not match objects 1 MB or smaller, so these objects are evaluated against Rule 3.

Rule 3 is the last and default rule in the policy, and it does not use filters. Rule 3 makes two replicated copies of all objects not matched by Rule 1 or Rule 2 (objects not belonging to Tenant A that are 1 MB or smaller).



What proposed, active, and historical policies are

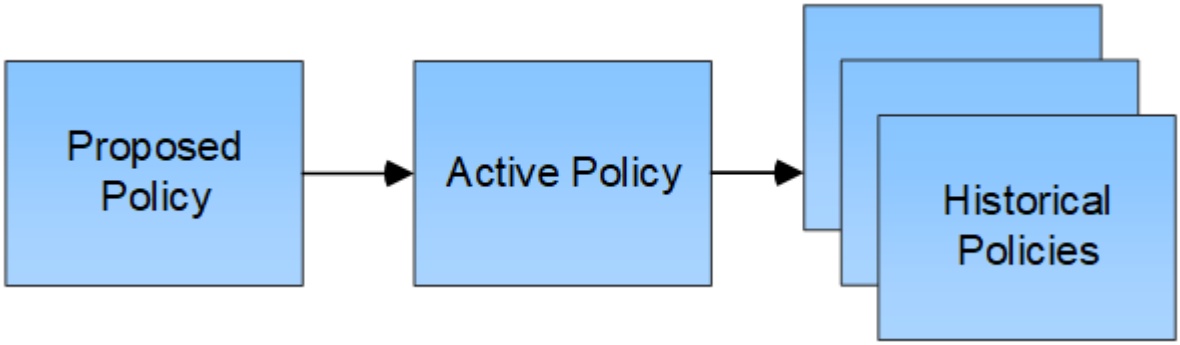
Every StorageGRID system must have one active ILM policy. A StorageGRID system might also have one proposed ILM policy and any number of historical policies.

When you first create an ILM policy, you create a proposed policy by selecting one or more ILM rules and arranging them in a specific order. After you have simulated the proposed policy to confirm its behavior, you activate it to create the active policy.

When you activate a new ILM policy, StorageGRID uses that policy to manage all objects, including existing objects and newly ingested objects. Existing objects might be moved to new locations when the ILM rules in the new policy are implemented.

Activating the proposed policy causes the previously active policy to become a historical policy. Historical ILM

policies cannot be deleted.



Related information

Creating an ILM policy

What an ILM rule is

To manage objects, you create a set of information lifecycle management (ILM) rules and organize them into an ILM policy. Every object ingested into the system is evaluated against the active policy. When a rule in the policy matches an object's metadata, the instructions in the rule determine what actions StorageGRID takes to copy and store that object.

ILM rules define:

- Which objects should be stored. A rule can apply to all objects, or you can specify filters to identify which objects a rule applies to. For example, a rule can apply only to objects associated with certain tenant accounts, specific S3 buckets or Swift containers, or specific metadata values.
- The storage type and location. Objects can be stored on Storage Nodes, in Cloud Storage Pools, or on Archive Nodes.
- The type of object copies made. Copies can be replicated or erasure coded.
- For replicated copies, the number of copies made.
- For erasure coded copies, the erasure-coding scheme used.
- The changes over time to an object's storage location and type of copies.
- How object data is protected as objects are ingested into the grid (synchronous placement or dual commit).

Note that object metadata is not managed by ILM rules. Instead, object metadata is stored in a Cassandra database in what is known as a metadata store. Three copies of object metadata are automatically maintained at each site to protect the data from loss. The copies are evenly distributed across all Storage Nodes.

Elements of an ILM rule

An ILM rule has three elements:

- **Filtering criteria**: A rule's basic and advanced filters define which objects the rule applies to. If an object matches all filters, StorageGRID applies the rule and creates the object copies specified in the rule's placement instructions.
- **Placement instructions**: A rule's placement instructions define the number, type, and location of object copies. Each rule can include a sequence of placement instructions to change the number, type, and

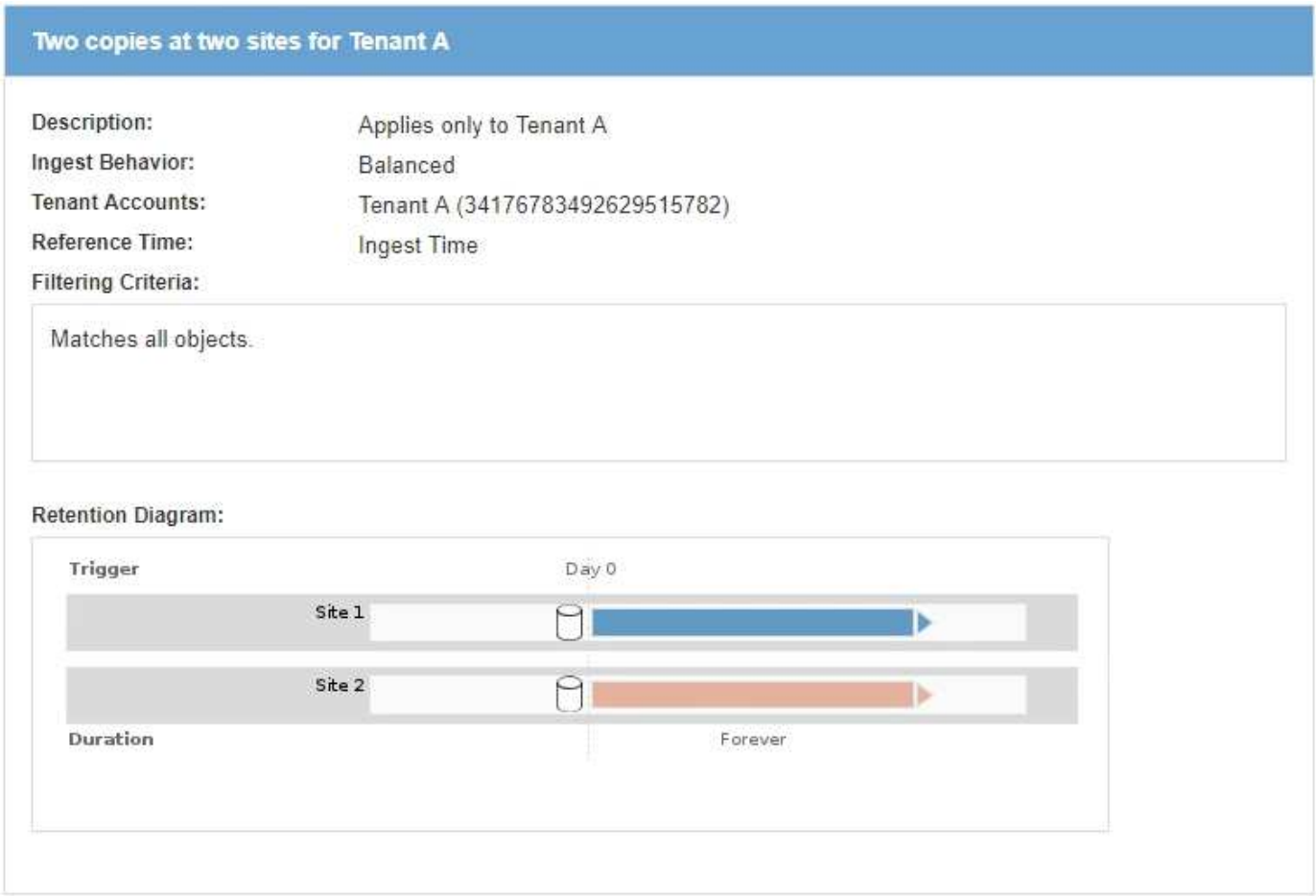
location of object copies over time. When the time period for one placement expires, the instructions in the next placement are automatically applied by the next ILM evaluation.

- **Ingest behavior**: A rule's ingest behavior defines what happens when an S3 or Swift client saves an object to the grid. Ingest behavior controls whether object copies are immediately placed according to the instructions in the rule, or if interim copies are made and the placement instructions are applied later.

Example ILM rule

This example ILM rule applies to the objects belonging to Tenant A. It makes two replicated copies of those objects and stores each copy at a different site. The two copies are retained "forever," which means that StorageGRID will not automatically delete them. Instead, StorageGRID will retain these objects until they are deleted by a client delete request or by the expiration of a bucket lifecycle.

This rule uses the Balanced option for ingest behavior: the two-site placement instruction is applied as soon as Tenant A saves an object to StorageGRID, unless it is not possible to immediately make both required copies. For example, if Site 2 is unreachable when Tenant A saves an object, StorageGRID will make two interim copies on Storage Nodes at Site 1. As soon as Site 2 becomes available, StorageGRID will make the required copy at that site.



Related information

Data-protection options for ingest

What a storage pool is

What a Cloud Storage Pool is

How objects are stored (replication or erasure coding)

What ILM rule filtering is

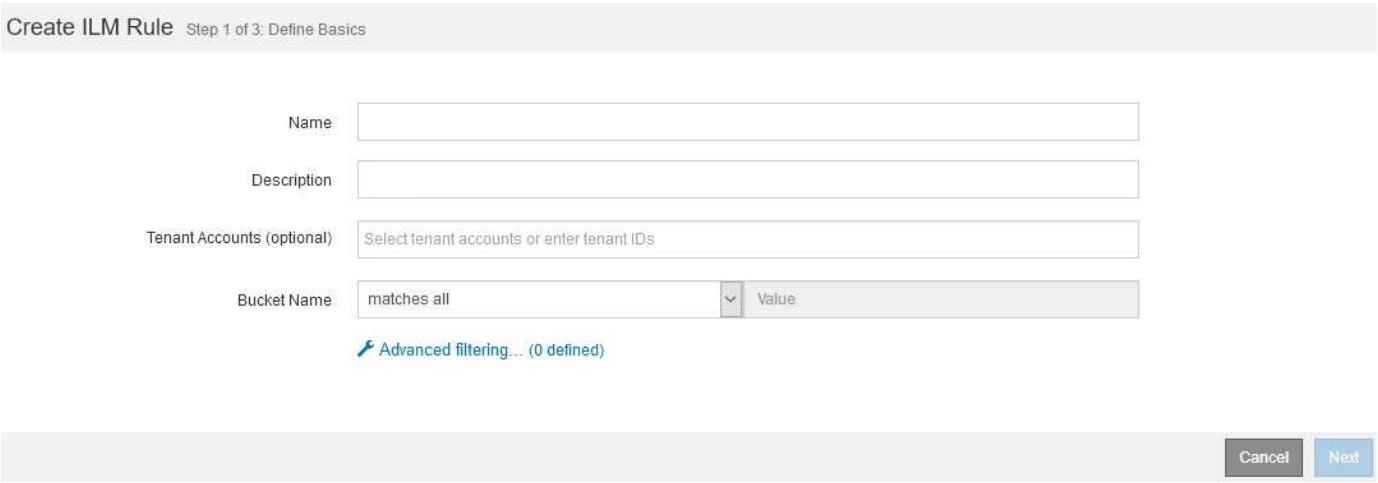
What ILM rule placement instructions are

What ILM rule filtering is

When you create an ILM rule, you specify filters to identify which objects the rule applies to.

In the simplest case, a rule might not use any filters. Any rule that does not use filters applies to all objects, so it must be the last (default) rule in an ILM policy. The default rule provides storage instructions for objects that do not match the filters in another rule.

Basic filters allow you to apply different rules to large, distinct groups of objects. The basic filters on the Define Basics page of the Create ILM Rule wizard allow you to apply a rule to specific tenant accounts, specific S3 buckets or Swift containers, or both.



These basic filters give you a simple way to apply different rules to large numbers of objects. For example, your company's financial records might need to be stored to meet regulatory requirements, while data from the marketing department might need to be stored to facilitate daily operations. After creating separate tenant accounts for each department or after segregating data from the different departments into separate S3 buckets, you can easily create one rule that applies to all financial records and a second rule that applies to all marketing data.

The **Advanced Filtering** page of the Create ILM Rule wizard gives you granular control. You can create filters to select objects based on the following object properties:

- Ingest time
- Last access time
- All or part of the object name (Key)
- S3 bucket region (Location Constraint)
- Object size
- User metadata
- S3 object tags

You can filter objects on very specific criteria. For example, objects stored by a hospital's imaging department might be used frequently when they are less than 30 days old and infrequently afterwards, while objects that contain patient visit information might need to be copied to the billing department at the health network's headquarters. You can create filters that identify each type of object based on object name, size, S3 object tags, or any other relevant criteria, and then create separate rules to store each set of objects appropriately.

You can also combine basic and advanced filters as needed in a single rule. For example, the marketing department might want to store large image files differently than their vendor records, while the Human Resources department might need to store personnel records in a specific geography and policy information centrally. In this case you can create rules that filter by tenant account to segregate the records from each department, while using advanced filters in each rule to identify the specific type of objects that the rule applies to.

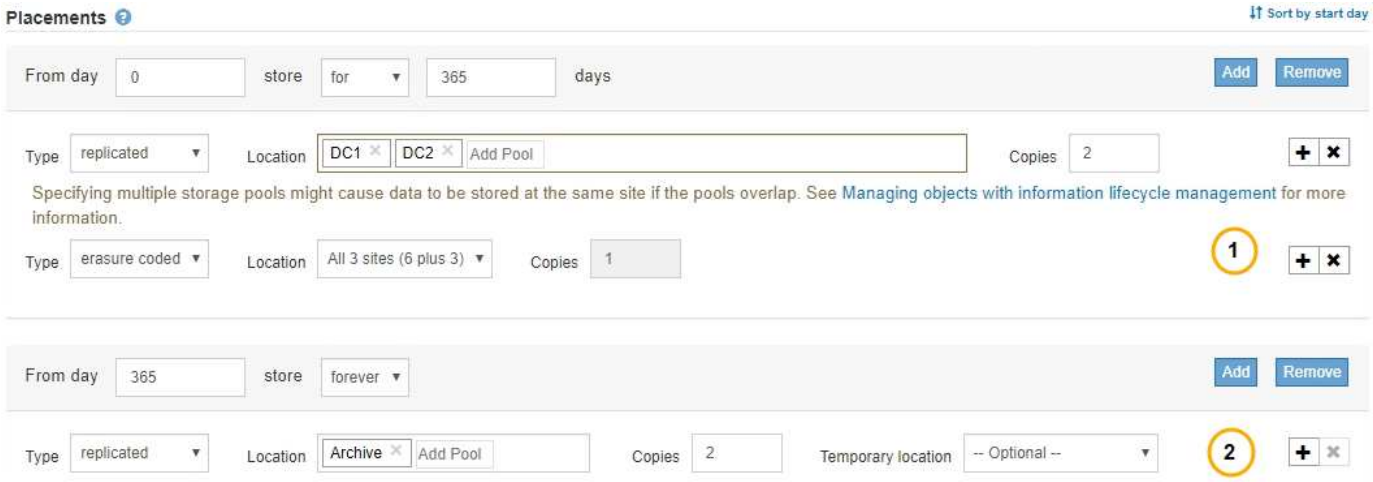
What ILM rule placement instructions are

Placement instructions determine where, when, and how object data is stored. An ILM rule can include one or more placement instructions. Each placement instruction applies to a single period of time.

When you create a placement instruction, you specify when the placement applies (the time period), which type of copies to create (replicated or erasure coded), and where to store the copies (one or more storage locations). Within a single rule you can specify multiple placements for one time period, and placement instructions for more than one time period:

- To specify more than one object placement during a single time period, click the plus sign icon ➕ to add more than one line for that time period.
- To specify object placements for more than one time period, click the **Add** button to add the next time period. Then, specify one or more lines within the time period.

The example shows the Define Placements page of the Create ILM Rule wizard.



1	The first placement instruction has two lines for the first year: 1. The first line creates two replicated object copies at two data center sites. 2. The second line creates a 6+3 erasure-coded copy using three data center sites.

2	The second placement instruction creates two archived copies after one year and keeps those copies forever.

When you define the set of placement instructions for a rule, you must ensure that at least one placement instruction begins at day 0, that there are no gaps between the time periods you have defined, and that the final placement instruction continues either forever or until you no longer require any object copies.

As each time period in the rule expires, the content placement instructions for the next time period are applied. New object copies are created and any unneeded copies are deleted.

Creating storage grades, storage pools, EC profiles, and regions

Before you can create the ILM rules for your StorageGRID system, you must define object storage locations, determine the types of copies you want, and optionally configure S3 regions.

- Creating and assigning storage grades
- Configuring storage pools
- Using Cloud Storage Pools
- Configuring Erasure Coding profiles
- Configuring regions (optional and S3 only)

Creating and assigning storage grades

Storage grades identify the type of storage used by a Storage Node. You can create storage grades if you want ILM rules to place certain objects on certain Storage Nodes, instead of on all nodes at the site. For example, you might want certain objects to be stored on your fastest Storage Nodes, such as StorageGRID all-flash storage appliances.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

About this task

If you use more than one type of storage, you can optionally create a storage grade to identify each type. Creating storage grades allows you to select a specific type of Storage Node when configuring storage pools.

If storage grade is not a concern (for example, all Storage Nodes are identical), you can skip this procedure and use the All Storage Nodes default storage grade when configuring storage pools.

When you add a new Storage Node in an expansion, that node is added to the All Storage Nodes default storage grade. As a result:

- If an ILM rule uses a storage pool with the All Storage Nodes grade, the new node can be used immediately after the expansion completes.

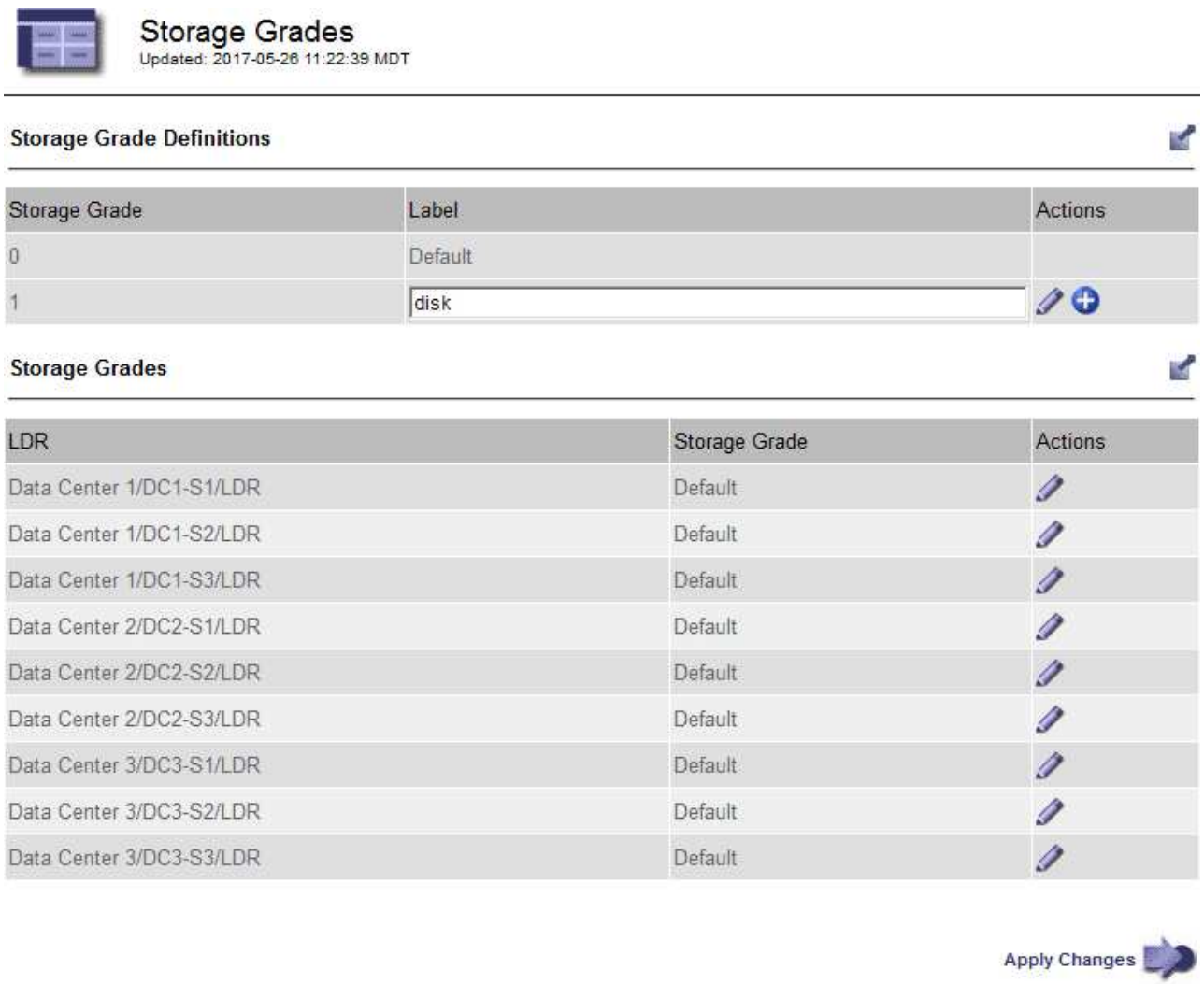
- If an ILM rule uses a storage pool with a custom storage grade, the new node will not be used until you manually assign the custom storage grade to the node, as described below.

> When creating storage grades, do not create more storage grades than necessary. For example, do not create one storage grade for each Storage Node. Instead, assign each storage grade to two or more nodes. Storage grades assigned to only one node can cause ILM backlogs if that node becomes unavailable.

Steps

1. Select **ILM** > **Storage Grades**.
2. Create a storage grade:
   a. For each storage grade you need to define, click **Insert** to add a row and enter a label for the storage grade.

      The Default storage grade cannot be modified. It is reserved for new Storage Nodes added during a StorageGRID system expansion.



   b. To edit an existing storage grade, click **Edit** and modify the label as required.

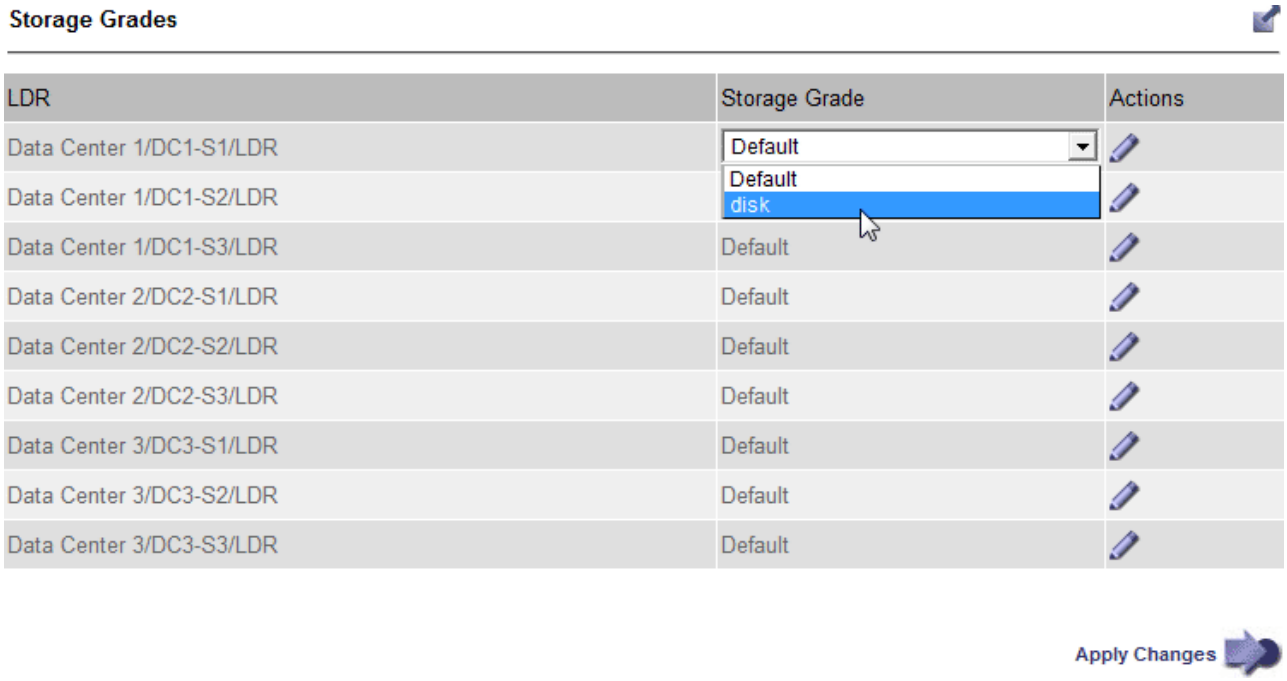
      > You cannot delete storage grades.

c. Click **Apply Changes**.

These storage grades are now available for assignment to Storage Nodes.

3. Assign a storage grade to a Storage Node:

a. For each Storage Node's LDR service, click **Edit** and select a storage grade from the list.



> Assign a storage grade to a given Storage Node only once. A Storage Node recovered from failure maintains the previously assigned storage grade. Do not change this assignment after the ILM policy is activated. If the assignment is changed, data is stored based on the new storage grade.

b. Click **Apply Changes**.

Configuring storage pools

When defining an ILM rule, you use storage pools to specify where objects are stored . Before creating a storage pool, you must review the storage pool guidelines.

- What a storage pool is
- Guidelines for creating storage pools
- Using multiple storage pools for cross-site replication
- Using a storage pool as a temporary location (deprecated)
- Creating a storage pool
- Viewing storage pool details
- Editing a storage pool
- Removing a storage pool

What a storage pool is

A storage pool is a logical grouping of Storage Nodes or Archive Nodes. You configure storage pools to determine where the StorageGRID system stores object data and the type of storage used.

Storage pools have two attributes:

- **Storage grade**: For Storage Nodes, the relative performance of backing storage.
- **Site**: The data center where objects will be stored.

Storage pools are used in ILM rules to determine where object data is stored. When you configure ILM rules for replication, you select one or more storage pools that include either Storage Nodes or Archive Nodes. When you create Erasure Coding profiles, you select a storage pool that includes Storage Nodes.

Guidelines for creating storage pools

When configuring and using storage pools, follow these guidelines.

Guidelines for all storage pools

- StorageGRID includes a default storage pool, All Storage Nodes, that uses the default site, All Sites, and the default storage grade, All Storage Nodes. The All Storage Nodes storage pool is automatically updated whenever you add new data center sites.

> Using the All Storage Nodes storage pool or the All Sites site is not recommended because these items are automatically updated to include any new sites you add in an expansion, which might not be the behavior you want. Before using the All Storage Nodes storage pool or the default site, carefully review the guidelines for replicated and erasure-coded copies.

- Keep storage pool configurations as simple as possible. Do not create more storage pools than necessary.
- Create storage pools with as many nodes as possible. Each storage pool should contain two or more nodes. A storage pool with insufficient nodes can cause ILM backlogs if a node becomes unavailable.
- Avoid creating or using storage pools that overlap (contain one or more of the same nodes). If storage pools overlap, more than one copy of object data might be saved on the same node.

Guidelines for storage pools used for replicated copies

- Create a different storage pool for each site. Then, specify one or more site-specific storage pools in the placement instructions for each rule. Using a storage pool for each site ensures that replicated object copies are placed exactly where you expect (for example, one copy of every object at each site for site-loss protection).
- If you add a site in an expansion, create a new storage pool for the new site. Then, update ILM rules to control which objects are stored on the new site.
- In general, do not use the default storage pool, All Storage Nodes, or any storage pool that includes the default site, All Sites.

Guidelines for storage pools used for erasure-coded copies

- You cannot use Archive Nodes for erasure-coded data.
- The number of Storage Nodes and sites contained in the storage pool determine which erasure-coding

schemes are available.

- If a storage pool includes only two sites, you cannot use that storage pool for erasure coding. No erasure-coding schemes are available for a storage pool that has two sites.
- In general, do not use the default storage pool, All Storage Nodes, or any storage pool that includes the default site, All Sites in any Erasure Coding profile.

> If your grid includes only one site, you are prevented from using the All Storage Nodes storage pool or the All Sites default site in an Erasure Coding profile. This behavior prevents the Erasure Coding profile from becoming invalid if a second site is added.

- If you have high throughput requirements, creating a storage pool that includes multiple sites is not recommended if the network latency between sites is greater than 100 ms. As latency increases, the rate at which StorageGRID can create, place, and retrieve object fragments decreases sharply due to the decrease in TCP network throughput. The decrease in throughput affects the maximum achievable rates of object ingest and retrieval (when Strict or Balanced are selected as the Ingest Behavior) or could lead to ILM queue backlogs (when Dual Commit is selected as the Ingest Behavior).
- If possible, a storage pool should include more than the minimum number of Storage Nodes required for the erasure-coding scheme you select. For example, if you use a 6+3 erasure-coding scheme, you must have at least nine Storage Nodes. However, having at least one additional Storage Node per site is recommended.
- Distribute Storage Nodes across sites as evenly as possible. For example, to support a 6+3 erasure-coding scheme, configure a storage pool that includes at least three Storage Nodes at three sites.

Guidelines for storage pools used for archived copies

- You cannot create a storage pool that includes both Storage Nodes and Archive Nodes. Archived copies require a storage pool that only includes Archive Nodes.
- When using a storage pool that includes Archive Nodes, you should also maintain at least one replicated or erasure-coded copy on a storage pool that includes Storage Nodes.
- If the global S3 Object Lock setting is enabled and you are creating a compliant ILM rule, you cannot use a storage pool that includes Archive Nodes. See the instructions for managing objects with S3 Object Lock.
- If an Archive Node's Target Type is Cloud Tiering - Simple Storage Service (S3), the Archive Node must be in its own storage pool. See the instructions for administering StorageGRID.

Related information

What replication is

What erasure coding is

What erasure-coding schemes are

Using multiple storage pools for cross-site replication

Using a storage pool as a temporary location (deprecated)

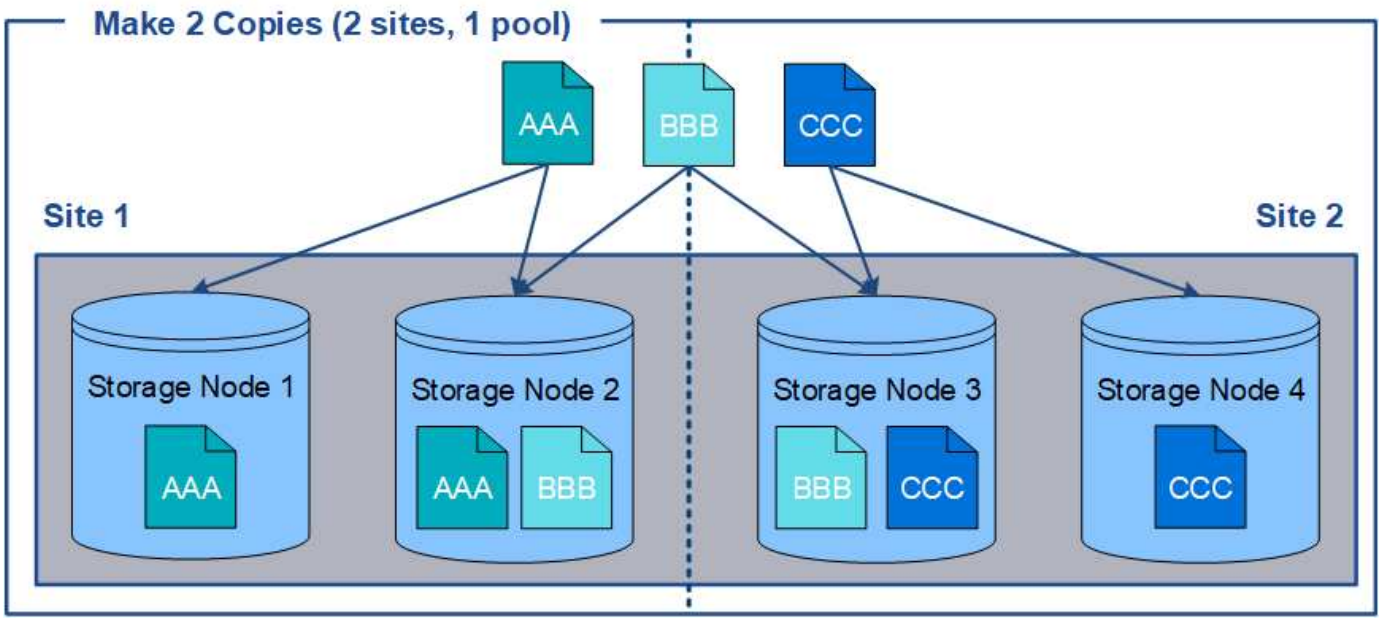
Managing objects with S3 Object Lock

Administer StorageGRID

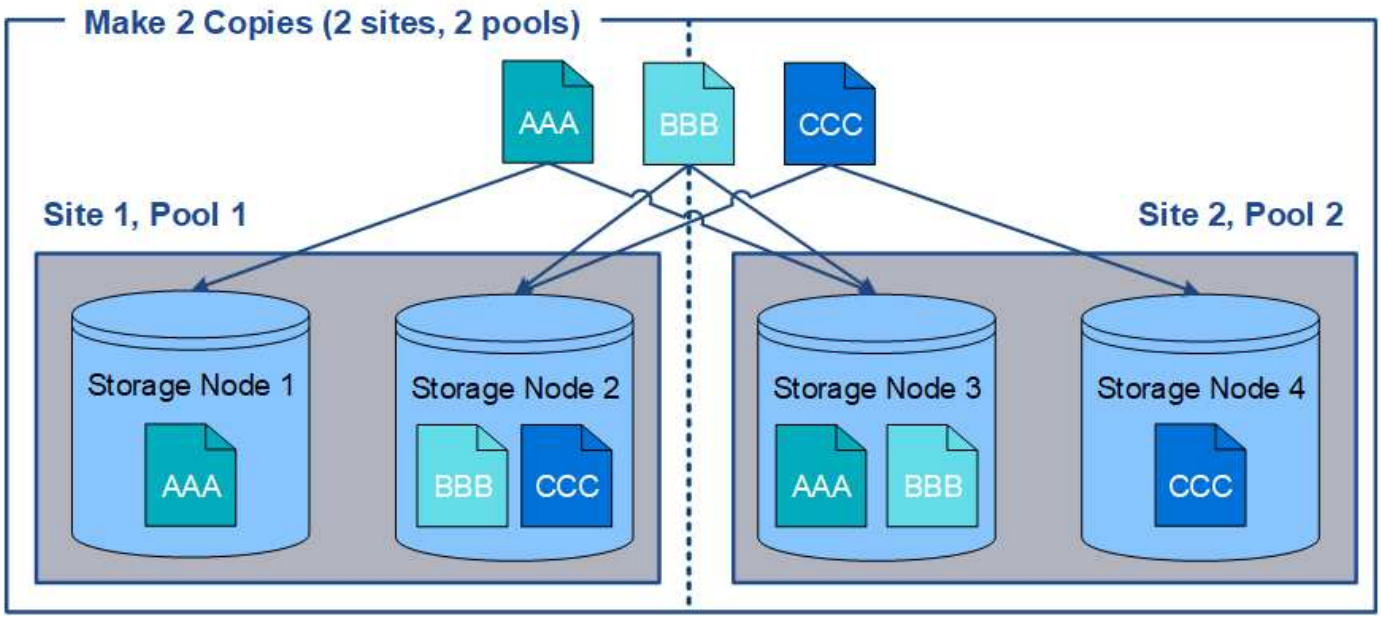
Using multiple storage pools for cross-site replication

If your StorageGRID deployment includes more than one site, you can enable site-loss protection by creating a storage pool for each site and specifying both storage pools in the rule's placement instructions. For example, if you configure an ILM rule to make two replicated copies and specify storage pools at two sites, one copy of each object will be placed at each site. If you configure a rule to make two copies and specify three storage pools, the copies are distributed to balance disk usage among the storage pools, while ensuring that the two copies are stored at different sites.

The following example illustrates what can happen if an ILM rule places replicated object copies to a single storage pool containing Storage Nodes from two sites. Because the system uses any available nodes in the storage pool when it places the replicated copies, it might place all copies of some objects within only one of the sites. In this example, the system stored two copies of object AAA on Storage Nodes at Site 1, and two copies of object CCC on Storage Nodes at Site 2. Only object BBB is protected if one of the sites fails or becomes inaccessible.



In contrast, this example illustrates how objects are stored when you use multiple storage pools. In the example, the ILM rule specifies that two replicated copies of each object be created, and that the copies be distributed to two storage pools. Each storage pool contains all Storage Nodes at one site. Because a copy of each object is stored at each site, object data is protected from site failure or inaccessibility.



When using multiple storage pools, keep the following rules in mind:

- If you are creating n copies, you must add n or more storage pools. For example, if a rule is configured to make three copies, you must specify three or more storage pools.
- If the number of copies equals the number of storage pools, one copy of the object is stored in each storage pool.
- If the number of copies is less than the number of storage pools, the system distributes the copies to keep disk usage among the pools balanced and to ensure that two or more copies are not stored in the same storage pool.
- If the storage pools overlap (contain the same Storage Nodes), all copies of the object might be saved at only one site. You must ensure that the selected storage pools do not contain the same Storage Nodes.

Using a storage pool as a temporary location (deprecated)

When you create an ILM rule with an object placement that includes a single storage pool, you are prompted to specify a second storage pool to use as a temporary location.

Temporary locations have been deprecated and will be removed in a future release. You should not select a storage pool as a temporary location for a new ILM rule.

> If you select the Strict ingest behavior (Step 3 of the Create ILM Rule wizard), the temporary location is ignored.

Related information

Data-protection options for ingest

Creating a storage pool

You create storage pools to determine where the StorageGRID system stores object data and the type of storage used. Each storage pool includes one or more sites and one or more storage grades.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have reviewed the guidelines for creating storage pools.

About this task

Storage pools determine where object data is stored. The number of storage pools you need depends on the number of sites in your grid and on the types of copies you want: replicated or erasure-coded.

- For replication and single-site erasure coding, create a storage pool for each site. For example, if you want to store replicated object copies at three sites, create three storage pools.
- For erasure coding at three or more sites, create one storage pool that includes an entry for each site. For example, if you want to erasure code objects across three sites, create one storage pool. Select the plus icon ✚ to add an entry for each site.

> Do not include the default All Sites site in a storage pool that will be used in an Erasure Coding profile. Instead, add a separate entry to the storage pool for each site that will store erasure coded data. See this step for an example.

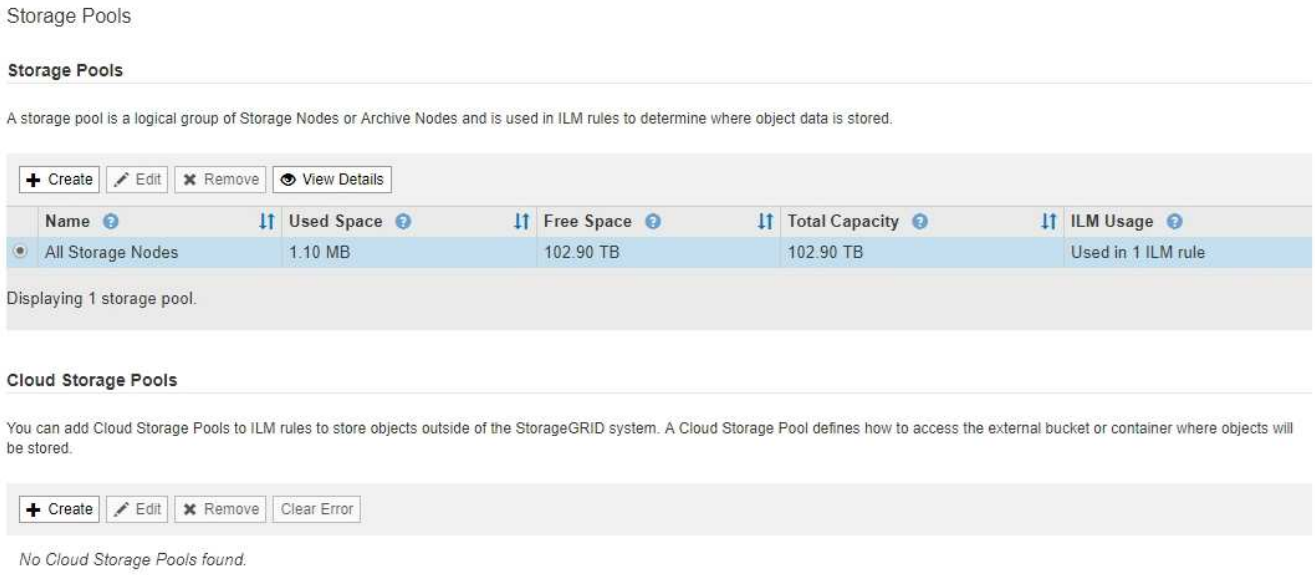
- If you have more than one storage grade, do not create a storage pool that includes different storage grades at a single site.

  Guidelines for creating storage pools

Steps

1. Select **ILM** > **Storage Pools**.

   The Storage Pools page appears and lists all defined storage pools.

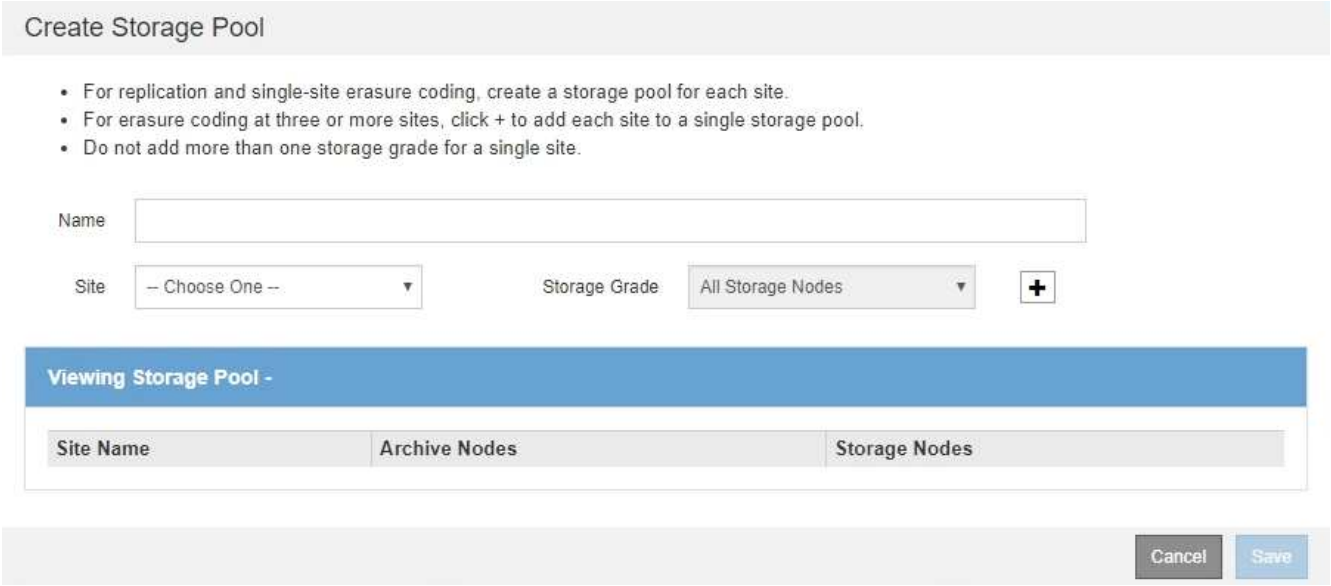


   The list includes the system-default storage pool, All Storage Nodes, which uses the system-default site, All Sites, and the default storage grade, All Storage Nodes.

> Because the All Storage Nodes storage pool is automatically updated whenever you add new data center sites, using this storage pool in ILM rules is not recommended.

2. To create a new storage pool, select **Create**.

   The Create Storage Pool dialog box appears.



3. Enter a unique name for the storage pool.

   Use a name that will be easy to identify when you configure Erasure Coding profiles and ILM rules.

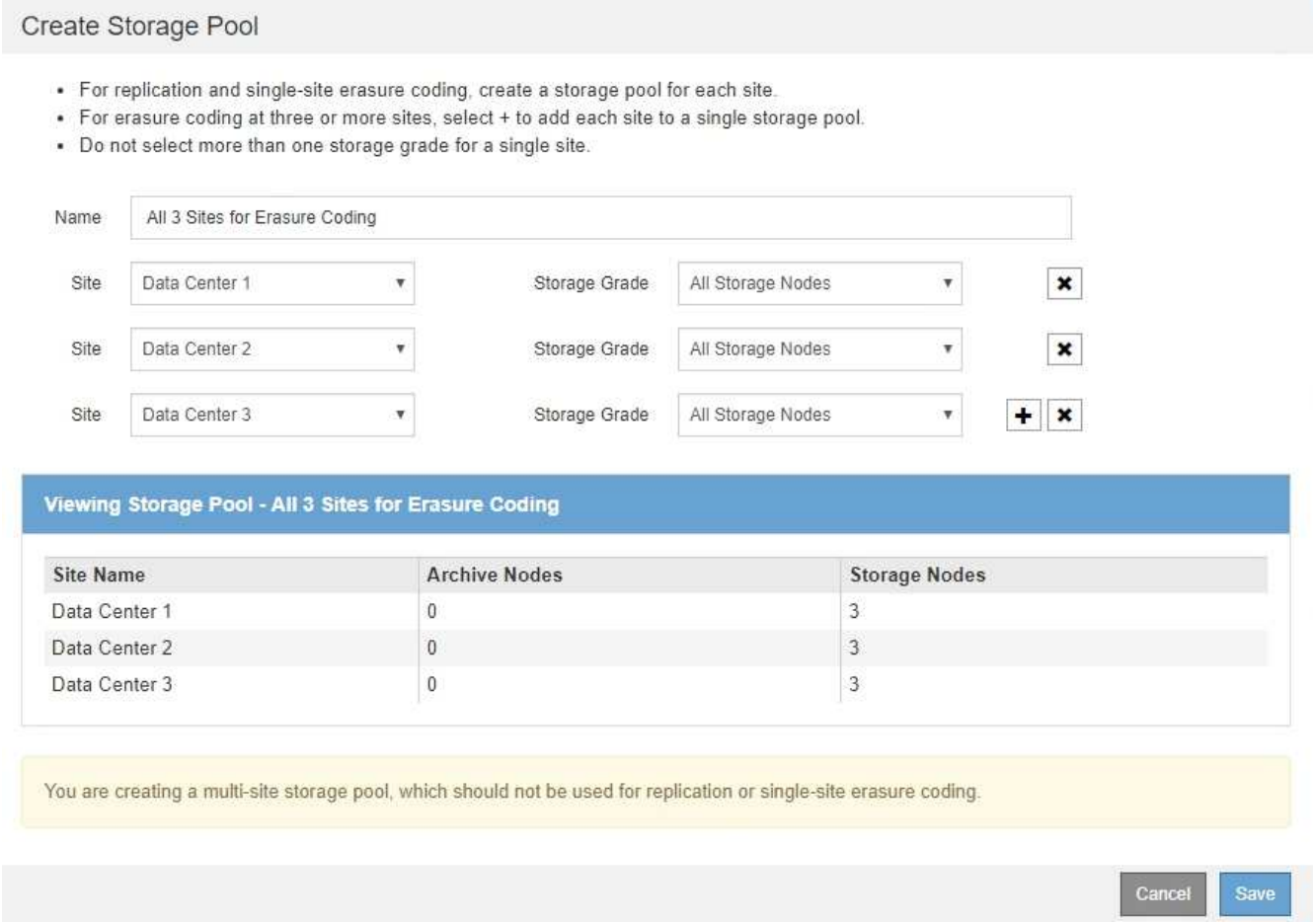
4. From the **Site** drop-down list, select a site for this storage pool.

   When you select a site, the number of Storage Nodes and Archive Nodes in the table are automatically updated.

5. From the **Storage Grade** drop-down list, select the type of storage that will be used if an ILM rule uses this storage pool.

   The default All Storage Nodes storage grade includes all Storage Nodes at the selected site. The default Archive Nodes storage grade includes all Archive Nodes at the selected site. If you created additional storage grades for the Storage Nodes in your grid, they are listed in the drop-down.

6. If you want to use the storage pool in a multi-site Erasure Coding profile, select ➕ to add an entry for each site to the storage pool.



> You are prevented from creating duplicate entries or from creating a storage pool that includes both the **Archive Nodes** storage grade and any storage grade that contains Storage Nodes.
>
> You are warned if you add more than one entry for a site but with different storage grades.

To remove an entry, select ✖.

7. When you are satisfied with your selections, select **Save**.

   The new storage pool is added to the list.

Related information

Guidelines for creating storage pools

Viewing storage pool details

You can view the details of a storage pool to determine where the storage pool is used and to see which nodes and storage grades are included.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

Steps

1. Select **ILM** > **Storage Pools**.

   The Storage Pools page appears. This page lists all defined storage pools.

   Storage Pools

   Storage Pools

   A storage pool is a logical group of Storage Nodes or Archive Nodes and is used in ILM rules to determine where object data is stored.

   + Create | Edit | Remove | View Details

Name	Used Space	Free Space	Total Capacity	ILM Usage
All Storage Nodes	1.88 MB	2.80 TB	2.80 TB	Used in 1 ILM rule
DC1	621.77 KB	932.42 GB	932.42 GB	Used in 2 ILM rules
DC2	675.82 KB	932.42 GB	932.42 GB	Used in 2 ILM rules
DC3	578.95 KB	932.42 GB	932.42 GB	Used in 1 ILM rule
All 3 Sites	1.88 MB	2.80 TB	2.80 TB	Used in 1 ILM rule and 1 EC profile
Archive	—	—	—	—

   Displaying 6 storage pools.

   Cloud Storage Pools

   You can add Cloud Storage Pools to ILM rules to store objects outside of the StorageGRID system. A Cloud Storage Pool defines how to access the external bucket or container where objects will be stored.

   + Create | Edit | Remove | Clear Error

   No Cloud Storage Pools found.

   The table includes the following information for each storage pool that includes Storage Nodes:

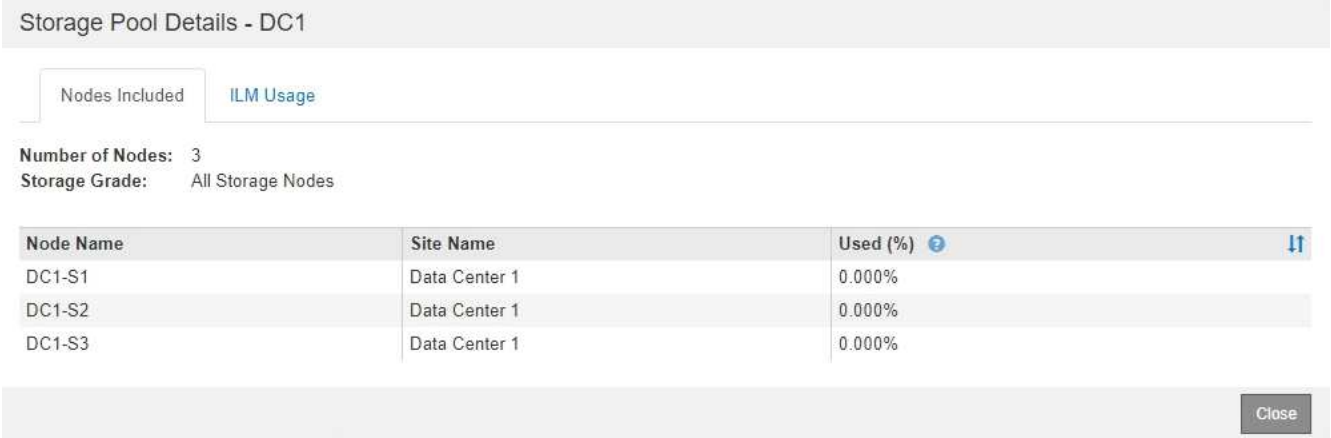
   - **Name**: The unique display name of the storage pool.
   - **Used Space**: The amount of space that is currently being used to store objects in the storage pool.
   - **Free Space**: The amount of space that remains available to store objects in the storage pool.
   - **Total Capacity**: The size of the storage pool, which equals the total amount of usable space for object data for all nodes in the storage pool .
   - **ILM Usage**: How the storage pool is currently being used. A storage pool might be unused or it might be used in one or more ILM rules, Erasure Coding profiles, or both.

     You cannot remove a storage pool if it is being used.

2. To view details about a specific storage pool, select its radio button and select **View Details**.

   The Storage Pool Details modal appears.

3. View the **Nodes Included** tab to learn about the Storage Nodes or Archive Nodes included in the storage pool.



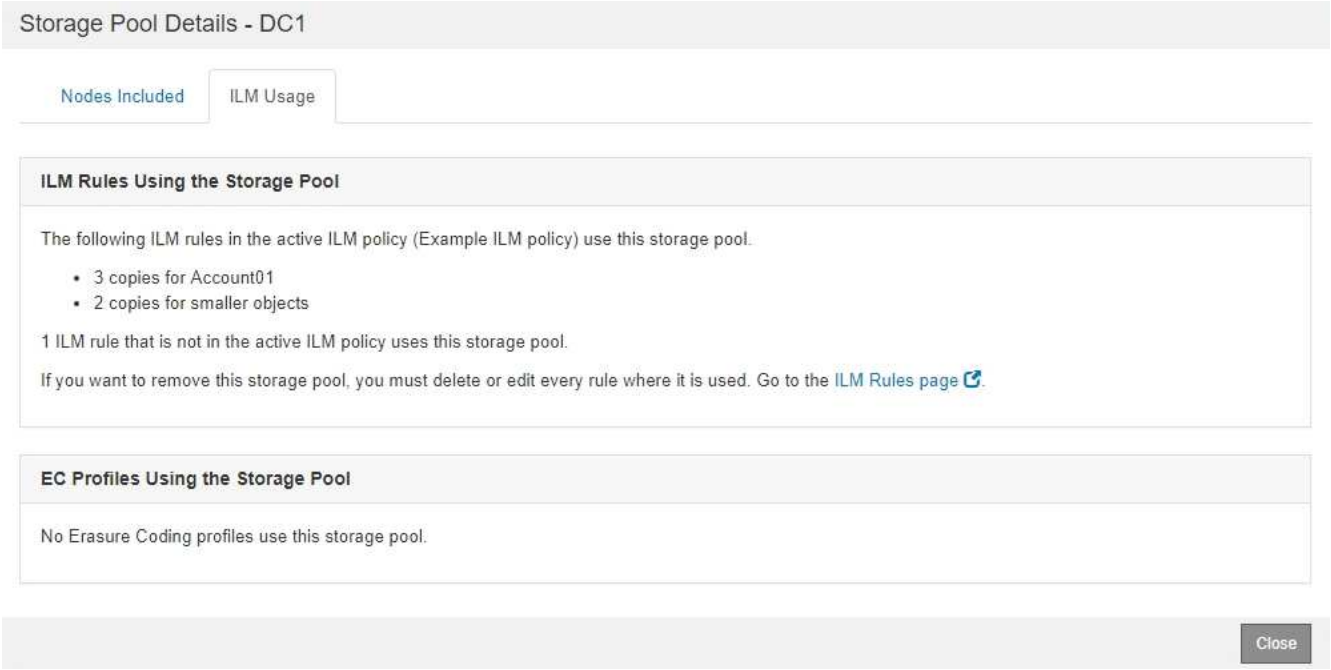
The table includes the following information for each node:

- Node Name
- Site Name
- Used (%): For Storage Nodes, the percentage of the total usable space for object data that has been used. This value does not include object metadata.

> The same Used (%) value is also shown in the Storage Used - Object Data chart for each Storage Node (select **Nodes** > ***Storage Node*** > **Storage**).

4. Select the **ILM Usage** tab to determine if the storage pool is currently being used in any ILM rules or Erasure Coding profiles.

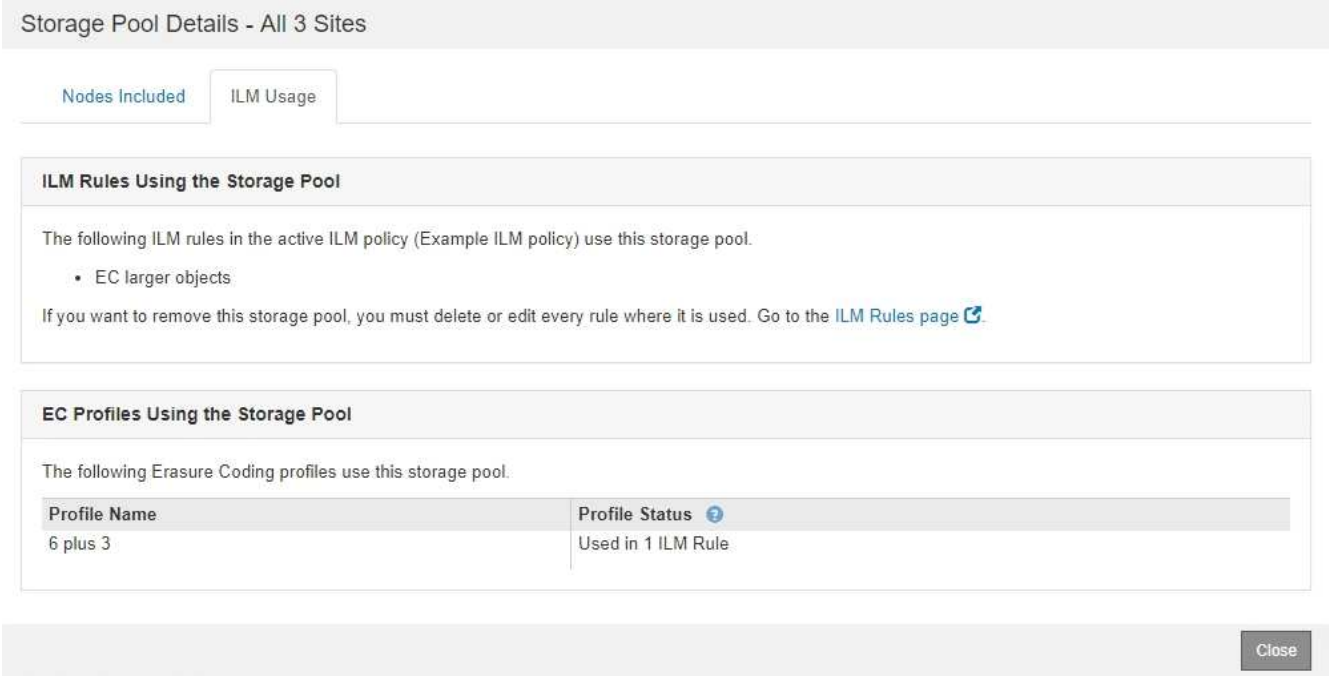
   In this example, the DC1 storage pool is used in three ILM rules: two rules that are in the active ILM policy and one rule that is not in the active policy.



> You cannot remove a storage pool if it is used in an ILM rule.

In this example, the All 3 Sites storage pool is used in an Erasure Coding profile. In turn, that Erasure

Coding profile is used by one ILM rule in the active ILM policy.



> You cannot remove a storage pool if it is used in an Erasure Coding profile.

5. Optionally, go to the **ILM Rules page** to learn about and manage any rules that use the storage pool.

   See the instructions for working with ILM rules.

6. When you are done viewing storage pool details, select **Close**.

Related information

Working with ILM rules and ILM policies

Editing a storage pool

You can edit a storage pool to change its name or to update sites and storage grades.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have reviewed the guidelines for creating storage pools.
- If you plan to edit a storage pool that is used by a rule in the active ILM policy, you must have considered how your changes will affect object data placement.

About this task

If you are adding a new storage grade to a storage pool that is used in the active ILM policy, be aware that the Storage Nodes in the new storage grade will not be used automatically. To force StorageGRID to use a new storage grade, you must activate a new ILM policy after saving the edited storage pool.

Steps

1. Select **ILM** > **Storage Pools**.

The Storage Pools page appears.

2. Select the radio button for the storage pool you want to edit.

   You cannot edit the All Storage Nodes storage pool.

3. Select **Edit**.
4. As required, change the storage pool name.
5. As required, select other sites and storage grades.

   > You are prevented from changing the site or storage grade if the storage pool is used in an Erasure Coding profile and the change would cause the erasure-coding scheme to become invalid. For example, if a storage pool used in a Erasure Coding profile currently includes a storage grade with only one site, you are prevented from using a storage grade with two sites since the change would make the erasure-coding scheme invalid.

6. Select **Save**.

After you finish

If you added a new storage grade to a storage pool used in the active ILM policy, activate a new ILM policy to force StorageGRID to use the new storage grade. For example, clone your existing ILM policy and then activate the clone.

Removing a storage pool

You can remove a storage pool that is not being used.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

Steps

1. Select **ILM** > **Storage Pools**.

   The Storage Pools page appears.

2. Look at the ILM Usage column in the table to determine whether you can remove the storage pool.

   You cannot remove a storage pool if it is being used in an ILM rule or in an Erasure Coding profile. As required, select **View Details** > **ILM Usage** to determine where a storage pool is used.

3. If the storage pool you want to remove is not being used, select the radio button.
4. Select **Remove**.
5. Select **OK**.

Using Cloud Storage Pools

You can use Cloud Storage Pools to move StorageGRID objects to an external storage location, such as S3 Glacier or Microsoft Azure Blob storage. Moving objects outside of the grid lets you take advantage of a low-cost storage tier for long-term archive.

- What a Cloud Storage Pool is
- Lifecycle of a Cloud Storage Pool object
- When to use Cloud Storage Pools
- Considerations for Cloud Storage Pools
- Comparing Cloud Storage Pools and CloudMirror replication
- Creating a Cloud Storage Pool
- Editing a Cloud Storage Pool
- Removing a Cloud Storage Pool
- Troubleshooting Cloud Storage Pools

What a Cloud Storage Pool is

A Cloud Storage Pool lets you use ILM to move object data outside of your StorageGRID system. For example, you might want to move infrequently accessed objects to lower-cost cloud storage, such as Amazon S3 Glacier, S3 Glacier Deep Archive, or the Archive access tier in Microsoft Azure Blob storage. Or, you might want to maintain a cloud backup of StorageGRID objects to enhance disaster recovery.

From an ILM perspective, a Cloud Storage Pool is similar to a storage pool. To store objects in either location, you select the pool when creating the placement instructions for an ILM rule. However, while storage pools consist of Storage Nodes or Archive Nodes within the StorageGRID system, a Cloud Storage Pool consists of an external bucket (S3) or container (Azure Blob storage).

The following table compares storage pools to Cloud Storage Pools and shows the high-level similarities and differences.

	Storage pool	**Cloud Storage Pool**
How is it created?	Using the **ILM** > **Storage Pools** option in Grid Manager. You must set up storage grades before you can create the storage pool.	Using the **ILM** > **Storage Pools** option in Grid Manager. You must set up the external bucket or container before you can create the Cloud Storage Pool.
How many pools can you create?	Unlimited.	Up to 10.

	Storage pool	Cloud Storage Pool
Where are objects stored?	On one or more Storage Nodes or Archive Nodes within StorageGRID.	In an Amazon S3 bucket or Azure Blob storage container that is external to the StorageGRID system. If the Cloud Storage Pool is an Amazon S3 bucket: • You can optionally configure a bucket lifecycle to transition objects to low-cost, long-term storage, such as Amazon S3 Glacier or S3 Glacier Deep Archive. The external storage system must support the Glacier storage class and the S3 POST Object restore API. • You can create Cloud Storage Pools for use with AWS Commercial Cloud Services (C2S), which supports the AWS Secret Region. If the Cloud Storage Pool is an Azure Blob storage container, StorageGRID transitions the object to the Archive tier. **Note:** In general, do not configure Azure Blob Storage lifecycle management for the container used for a Cloud Storage Pool. POST Object restore operations on objects in the Cloud Storage Pool can be affected by the configured lifecycle.
What controls object placement?	An ILM rule in the active ILM policy.	An ILM rule in the active ILM policy.
What data protection method is used?	Replication or erasure coding.	Replication.
How many copies of each object are allowed?	Multiple.	One copy in the Cloud Storage Pool and, optionally, one or more copies in StorageGRID. **Note:** You cannot store an object in more than one Cloud Storage Pool at any given time.
What are the advantages?	Objects are quickly accessible at any time.	Low-cost storage.

Lifecycle of a Cloud Storage Pool object

Before implementing Cloud Storage Pools, review the lifecycle of objects that are stored in each type of Cloud Storage Pool.

Related information

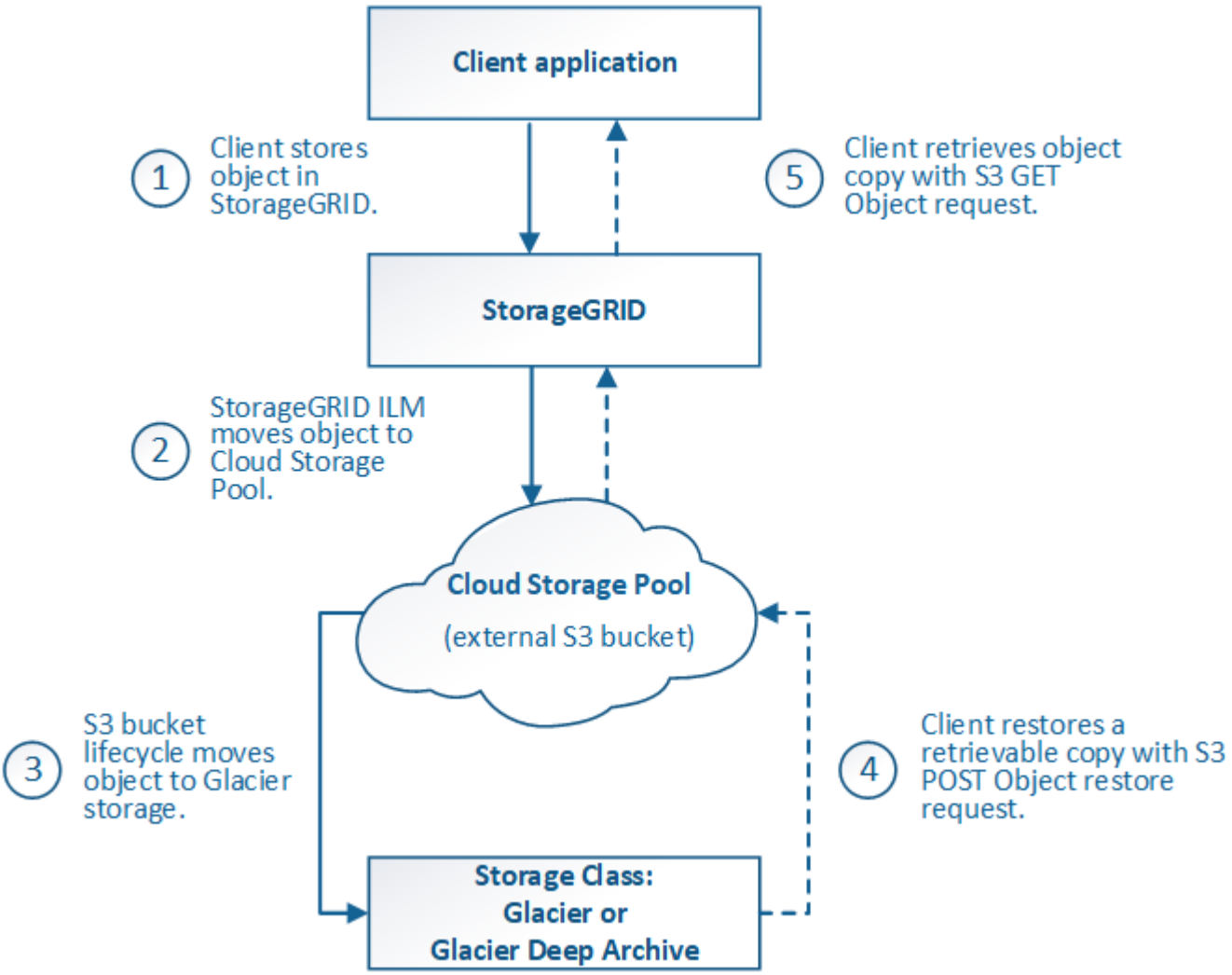
S3: Lifecycle of a Cloud Storage Pool object

Azure: Lifecycle of a Cloud Storage Pool object]

S3: Lifecycle of a Cloud Storage Pool object

The figure shows the lifecycle stages of an object that is stored in an S3 Cloud Storage Pool.

> In the figure and explanations, “Glacier” refers to both the Glacier storage class and the Glacier Deep Archive storage class, with one exception: the Glacier Deep Archive storage class does not support the Expedited restore tier. Only Bulk or Standard retrieval is supported.



1. **Object stored in StorageGRID**

   To start the lifecycle, a client application stores an object in StorageGRID.

2. **Object moved to S3 Cloud Storage Pool**
   - When the object is matched by an ILM rule that uses an S3 Cloud Storage Pool as its placement location, StorageGRID moves the object to the external S3 bucket specified by the Cloud Storage Pool.
   - When the object has been moved to the S3 Cloud Storage Pool, the client application can retrieve it using an S3 GET Object request from StorageGRID, unless the object has been transitioned to Glacier storage.
3. **Object transitioned to Glacier (non-retrievable state)**
   - Optionally, the object can be transitioned to Glacier storage. For example, the external S3 bucket might use lifecycle configuration to transition an object to Glacier storage immediately or after some number of days.

     > If you want to transition objects, you must create a lifecycle configuration for the external S3 bucket, and you must use a storage solution that implements the Glacier storage class and supports the S3 POST Object restore API.

     > Do not use Cloud Storage Pools for objects that have been ingested by Swift clients. Swift does not support POST Object restore requests, so StorageGRID will not be able to retrieve any Swift objects that have been transitioned to S3 Glacier storage. Issuing a Swift GET object request to retrieve these objects will fail (403 Forbidden).

   - During the transition, the client application can use an S3 HEAD Object request to monitor the object's status.
4. **Object restored from Glacier storage**

   If an object has been transitioned to Glacier storage, the client application can issue an S3 POST Object restore request to restore a retrievable copy to the S3 Cloud Storage Pool. The request specifies how many days the copy should be available in the Cloud Storage Pool and the data-access tier to use for the restore operation (Expedited, Standard, or Bulk). When the expiration date of the retrievable copy is reached, the copy is automatically returned to a non-retrievable state.

   > If one or more copies of the object also exist on Storage Nodes within StorageGRID, there is no need to restore the object from Glacier by issuing a POST Object restore request. Instead, the local copy can be retrieved directly, using a GET Object request.

5. **Object retrieved**

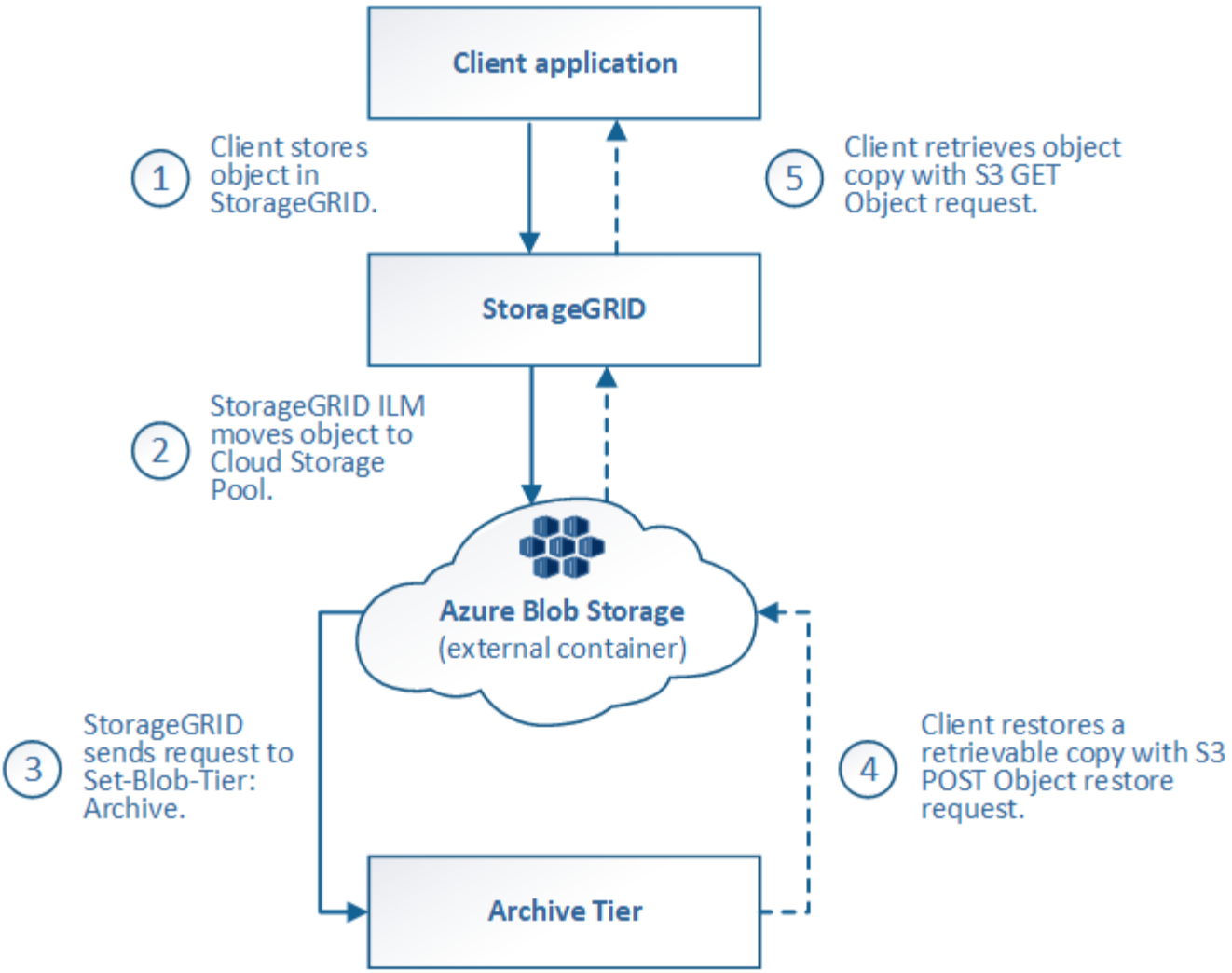
   Once an object has been restored, the client application can issue a GET Object request to retrieve the restored object.

Related information

Use S3

Azure: Lifecycle of a Cloud Storage Pool object

The figure shows the lifecycle stages of an object that is stored in an Azure Cloud Storage Pool.



1. **Object stored in StorageGRID**

   To start the lifecycle, a client application stores an object in StorageGRID.

2. **Object moved to Azure Cloud Storage Pool**

   When the object is matched by an ILM rule that uses an Azure Cloud Storage Pool as its placement location, StorageGRID moves the object to the external Azure Blob storage container specified by the Cloud Storage Pool

   > Do not use Cloud Storage Pools for objects that have been ingested by Swift clients. Swift does not support POST Object restore requests, so StorageGRID will not be able to retrieve any Swift objects that have been transitioned to the Azure Blob storage Archive tier. Issuing a Swift GET object request to retrieve these objects will fail (403 Forbidden).

3. **Object transitioned to Archive tier (non-retrievable state)**

   Immediately after moving the object to the Azure Cloud Storage Pool, StorageGRID automatically transitions the object to the Azure Blob storage Archive tier.

4. **Object restored from Archive tier**

   If an object has been transitioned to the Archive tier, the client application can issue an S3 POST Object

restore request to restore a retrievable copy to the Azure Cloud Storage Pool.

When StorageGRID receives the POST Object Restore, it temporarily transitions the object to the Azure Blob storage Cool tier. As soon as the expiration date in the POST Object restore request is reached, StorageGRID transitions the object back to the Archive tier.

> If one or more copies of the object also exist on Storage Nodes within StorageGRID, there is no need to restore the object from the Archive access tier by issuing a POST Object restore request. Instead, the local copy can be retrieved directly, using a GET Object request.

5. **Object retrieved**

   Once an object has been restored to the Azure Cloud Storage Pool, the client application can issue a GET Object request to retrieve the restored object.

When to use Cloud Storage Pools

Cloud Storage Pools can provide significant benefits in several use cases.

Backing up StorageGRID data in an external location

You can use a Cloud Storage Pool to back up StorageGRID objects to an external location.

If the copies in StorageGRID are inaccessible, the object data in the Cloud Storage Pool can be used to serve client requests. However, you might need to issue S3 POST Object restore request to access the backup object copy in the Cloud Storage Pool.

The object data in a Cloud Storage Pool can also be used to recover data lost from StorageGRID because of a storage volume or Storage Node failure. If the only remaining copy of an object is in a Cloud Storage Pool, StorageGRID temporarily restores the object and creates a new copy on the recovered Storage Node.

To implement a backup solution:

1. Create a single Cloud Storage Pool.
2. Configure an ILM rule that simultaneously stores object copies on Storage Nodes (as replicated or erasure-coded copies) and a single object copy in the Cloud Storage Pool.
3. Add the rule to your ILM policy. Then, simulate and activate the policy.

Tiering data from StorageGRID to external location

You can use a Cloud Storage Pool to store objects outside of the StorageGRID system. For example, suppose you have a large number of objects that you need to retain, but you expect to access those objects rarely, if ever. You can use a Cloud Storage Pool to tier the objects to lower-cost storage and to free up space in StorageGRID.

To implement a tiering solution:

1. Create a single Cloud Storage Pool.
2. Configure an ILM rule that moves rarely used objects from Storage Nodes to the Cloud Storage Pool.
3. Add the rule to your ILM policy. Then, simulate and activate the policy.

Maintain multiple cloud endpoints

You can configure multiple Cloud Storage Pools if you want to tier or back up object data to more than one cloud. The filters in your ILM rules let you specify which objects are stored in each Cloud Storage Pool. For example, you might want to store objects from some tenants or buckets in Amazon S3 Glacier and objects from other tenant or buckets in Azure Blob storage. Or, you might want to move data between Amazon S3 Glacier and Azure Blob storage. When using multiple Cloud Storage Pools, keep in mind that an object can be stored in only one Cloud Storage Pool at a time.

To implement multiple cloud endpoints:

1. Create up to 10 Cloud Storage Pools.
2. Configure ILM rules to store the appropriate object data at the appropriate time in each Cloud Storage Pool. For example, store objects from bucket A in Cloud Storage Pool A, and store objects from bucket B in Cloud Storage Pool B. Or, store objects in Cloud Storage Pool A for some amount of time and then move them to Cloud Storage Pool B.
3. Add the rules to your ILM policy. Then, simulate and activate the policy.

Considerations for Cloud Storage Pools

If you plan to use a Cloud Storage Pool to move objects out of the StorageGRID system, you must review the considerations for configuring and using Cloud Storage Pools.

General considerations

- In general, cloud archival storage, such as Amazon S3 Glacier or Azure Blob storage, is an inexpensive place to store object data. However, the costs to retrieve data from cloud archival storage are relatively high. To achieve the lowest overall cost, you must consider when and how often you will access the objects in the Cloud Storage Pool. Using a Cloud Storage Pool is recommended only for content that you expect to access infrequently.
- Do not use Cloud Storage Pools for objects that have been ingested by Swift clients. Swift does not support POST Object restore requests, so StorageGRID will not be able to retrieve any Swift objects that have been transitioned to S3 Glacier storage or the Azure Blob storage Archive tier. Issuing a Swift GET object request to retrieve these objects will fail (403 Forbidden).
- Using Cloud Storage Pools with FabricPool is not supported because of the added latency to retrieve an object from the Cloud Storage Pool target.

Information required to create a Cloud Storage Pool

Before you can create a Cloud Storage Pool, you must create the external S3 bucket or the external Azure Blob storage container that you will use for the Cloud Storage Pool. Then, when you create the Cloud Storage Pool in StorageGRID, you must specify the following information:

- The provider type: Amazon S3 or Azure Blob storage.
- If you select Amazon S3, whether the Cloud Storage Pool is for use with the AWS Secret Region (**CAP (C2S Access Portal)**).
- The exact name of the bucket or container.
- The service endpoint needed to access the bucket or container.
- The authentication needed to access the bucket or container:
  - **S3**: Optionally, an access key ID and secret access key.

- **C2S**: The complete URL for obtaining temporary credentials from the CAP server; a server CA certificate, a client certificate, a private key for the client certificate, and, if the private key is encrypted, the passphrase for decrypting it.
- **Azure Blob storage**: An account name and account key. These credentials must have full permission for the container.

- Optionally, a custom CA certificate to verify TLS connections to the bucket or container.

Considerations for the ports used for Cloud Storage Pools

To ensure that the ILM rules can move objects to and from the specified Cloud Storage Pool, you must configure the network or networks that contain your system's Storage Nodes. You must ensure that the following ports can communicate with the Cloud Storage Pool.

By default, Cloud Storage Pools use the following ports:

- **80**: For endpoint URIs that begin with http
- **443**: For endpoint URIs that begin with https

You can specify a different port when you create or edit a Cloud Storage Pool.

If you use a non-transparent proxy server, you must also configure a Storage proxy to allow messages to be sent to external endpoints, such as an endpoint on the internet.

Considerations for costs

Access to storage in the cloud using a Cloud Storage Pool requires network connectivity to the cloud. You must consider the cost of the network infrastructure you will use to access the cloud and provision it appropriately, based on the amount of data you expect to move between StorageGRID and the cloud using the Cloud Storage Pool.

When StorageGRID connects to the external Cloud Storage Pool endpoint, it issues various requests to monitor connectivity and to ensure it can perform the required operations. While some additional costs will be associated with these requests, the cost of monitoring a Cloud Storage Pool should only be a small fraction of the overall cost of storing objects in S3 or Azure.

More significant costs might be incurred if you need to move objects from an external Cloud Storage Pool endpoint back to StorageGRID. Objects might be moved back to StorageGRID in either of these cases:

- The only copy of the object is in a Cloud Storage Pool and you decide to store the object in StorageGRID instead. In this case, you simply reconfigure your ILM rules and policy. When ILM evaluation occurs, StorageGRID issues multiple requests to retrieve the object from the Cloud Storage Pool. StorageGRID then creates the specified number of replicated or erasure-coded copies locally. After the object is moved back to StorageGRID, the copy in the Cloud Storage Pool is deleted.
- Objects are lost because of Storage Node failure. If the only remaining copy of an object is in a Cloud Storage Pool, StorageGRID temporarily restores the object and creates a new copy on the recovered Storage Node.

> When objects are moved back to StorageGRID from a Cloud Storage Pool, StorageGRID issues multiple requests to the Cloud Storage Pool endpoint for each object. Before moving large numbers of objects, contact technical support for help in estimating the time frame and associated costs.

S3: Permissions required for the Cloud Storage Pool bucket

The bucket policy for the external S3 bucket used for a Cloud Storage Pool must grant StorageGRID permission to move an object to the bucket, get an object's status, restore an object from Glacier storage when required, and more. Ideally, StorageGRID should have full-control access to the bucket (`s3:*`); however, if this is not possible, the bucket policy must grant the following S3 permissions to StorageGRID:

- `s3:AbortMultipartUpload`
- `s3:DeleteObject`
- `s3:GetObject`
- `s3:ListBucket`
- `s3:ListBucketMultipartUploads`
- `s3:ListMultipartUploadParts`
- `s3:PutObject`
- `s3:RestoreObject`

S3: Considerations for the external bucket's lifecycle

The movement of objects between StorageGRID and the external S3 bucket specified in the Cloud Storage Pool is controlled by ILM rules and the active ILM policy in StorageGRID. In contrast, the transition of objects from the external S3 bucket specified in the Cloud Storage Pool to Amazon S3 Glacier or S3 Glacier Deep Archive (or to a storage solution that implements the Glacier storage class) is controlled by that bucket's lifecycle configuration.

If you want to transition objects from the Cloud Storage Pool, you must create the appropriate lifecycle configuration on the external S3 bucket, and you must use a storage solution that implements the Glacier storage class and supports the S3 POST Object restore API.

For example, suppose you want all objects that are moved from StorageGRID to the Cloud Storage Pool to be transitioned to Amazon S3 Glacier storage immediately. You would create a lifecycle configuration on the external S3 bucket that specifies a single action (**Transition**) as follows:

```
<LifecycleConfiguration>
  <Rule>
    <ID>Transition Rule</ID>
    <Filter>
       <Prefix></Prefix>
    </Filter>
    <Status>Enabled</Status>
    <Transition>
      <Days>0</Days>
      <StorageClass>GLACIER</StorageClass>
    </Transition>
  </Rule>
</LifecycleConfiguration>
```

This rule would transition all bucket objects to Amazon S3 Glacier on the day they were created (that is, on the

day they were moved from StorageGRID to the Cloud Storage Pool).

> When configuring the external bucket's lifecycle, never use **Expiration** actions to define when objects expire. Expiration actions cause the external storage system to delete expired objects. If you later attempt to access an expired object from StorageGRID, the deleted object will not be found.

If you want to transition objects in the Cloud Storage Pool to S3 Glacier Deep Archive (instead of to Amazon S3 Glacier), specify `<StorageClass>DEEP_ARCHIVE</StorageClass>` in the bucket lifecycle. However, be aware that you cannot use the `Expedited` tier to restore objects from S3 Glacier Deep Archive.

Azure: Considerations for Access tier

When you configure an Azure storage account, you can set the default Access tier to Hot or Cool. When creating a storage account for use with a Cloud Storage Pool, you should use the Hot tier as the default tier. Even though StorageGRID immediately sets the tier to Archive when it moves objects to the Cloud Storage Pool, using a default setting of Hot ensures that you will not be charged an early deletion fee for objects removed from the Cool tier before the 30-day minimum.

Azure: Lifecycle management not supported

Do not use Azure Blob Storage lifecycle management for the container used with a Cloud Storage Pool. The lifecycle operations might interfere with Cloud Storage Pool operations.

Related information

Creating a Cloud Storage Pool

S3: Specifying authentication details for a Cloud Storage Pool

C2S S3: Specifying authentication details for a Cloud Storage Pool

Azure: Specifying authentication details for a Cloud Storage Pool

Administer StorageGRID

Comparing Cloud Storage Pools and CloudMirror replication

As you begin using Cloud Storage Pools, it might be helpful to understand the similarities and differences between Cloud Storage Pools and the StorageGRID CloudMirror replication service.

	Cloud Storage Pool	CloudMirror replication service
What is the primary purpose?	A Cloud Storage Pool acts as an archive target. The object copy in the Cloud Storage Pool can be the only copy of the object, or it can be an additional copy. That is, instead of keeping two copies on-premise, you can keep only one copy within StorageGRID and send a copy to the Cloud Storage Pool.	The CloudMirror replication service enables a tenant to automatically replicate objects from a bucket in StorageGRID (source) to an external S3 bucket (destination). CloudMirror replication creates an independent copy of an object in an independent S3 infrastructure.

	Cloud Storage Pool	CloudMirror replication service
How is it set up?	Cloud Storage Pools are defined in the same way as storage pools, using the Grid Manager or the Grid Management API. A Cloud Storage Pool can be selected as the placement location in an ILM rule. While a storage pool consists of a group of Storage Nodes, a Cloud Storage Pool is defined using a remote S3 or Azure endpoint (IP address, credentials, and so on).	A tenant user configures CloudMirror replication by defining a CloudMirror endpoint (IP address, credentials, and so on) using the Tenant Manager or the S3 API. After the CloudMirror endpoint is set up, any bucket owned by that tenant account can be configured to point to the CloudMirror endpoint.
Who is responsible for setting it up?	Typically, a grid administrator	Typically, a tenant user
What is the destination?	• Any compatible S3 infrastructure (including Amazon S3) • Azure Blob Archive tier	• Any compatible S3 infrastructure (including Amazon S3)
What causes objects to be moved to the destination?	One or more ILM rules in the active ILM policy. The ILM rules define which objects StorageGRID moves to the Cloud Storage Pool and when the objects are moved.	The act of ingesting a new object into a source bucket that has been configured with a CloudMirror endpoint.Objects that existed in the source bucket before the bucket was configured with the CloudMirror endpoint are not replicated, unless they are modified.
How are objects retrieved?	Applications must make requests to StorageGRID to retrieve objects that have been moved to a Cloud Storage Pool. If the only copy of an object has been transitioned to archival storage, StorageGRID manages the process of restoring the object so it can be retrieved.	Because the mirrored copy in the destination bucket is an independent copy, applications can retrieve the object by making requests either to StorageGRID or to the S3 destination. For example, suppose you use CloudMirror replication to mirror objects to a partner organization. The partner can use its own applications to read or update objects directly from the S3 destination. Using StorageGRID is not required.
Can you read from the destination directly?	No. Objects moved to a Cloud Storage Pool are managed by StorageGRID. Read requests must be directed to StorageGRID (and StorageGRID will be responsible for retrieval from Cloud Storage Pool).	Yes, because the mirrored copy is an independent copy.
What happens if an object is deleted from the source?	The object is also deleted in the Cloud Storage Pool.	The delete action is not replicated. A deleted object no longer exists in the StorageGRID bucket, but it continues to exist in the destination bucket. Similarly, objects in the destination bucket can be deleted without affecting the source.

	Cloud Storage Pool	CloudMirror replication service
How do you access objects after a disaster (StorageGRID system not operational)?	Failed StorageGRID nodes must be recovered. During this process, copies of replicated objects might be restored using the copies in the Cloud Storage Pool.	The object copies in the CloudMirror destination are independent of StorageGRID, so they can be accessed directly before the StorageGRID nodes are recovered.

Related information

Administer StorageGRID

Creating a Cloud Storage Pool

When you create a Cloud Storage Pool, you specify the name and location of the external bucket or container that StorageGRID will use to store objects, the cloud provider type (Amazon S3 or Azure Blob Storage), and the information StorageGRID needs to access the external bucket or container.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have reviewed the guidelines for configuring Cloud Storage Pools.
- The external bucket or container referenced by the Cloud Storage Pool must exist.
- You must have all of the authentication information needed to access the bucket or container.

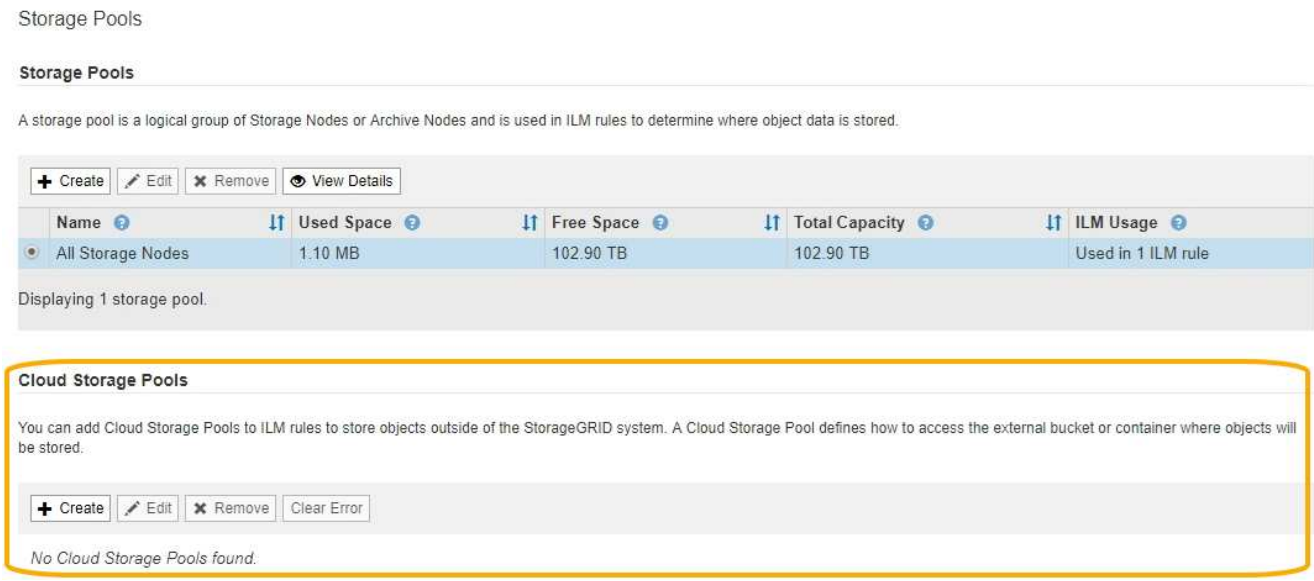
About this task

A Cloud Storage Pool specifies a single external S3 bucket or Azure Blob storage container. StorageGRID validates the Cloud Storage Pool as soon as you save it, so you must ensure that the bucket or container specified in the Cloud Storage Pool exists and is reachable.

Steps

1. Select **ILM** > **Storage Pools**.

   The Storage Pools page appears. This page includes two sections: Storage Pools and Cloud Storage Pools.



2. In the Cloud Storage Pools section of the page, click **Create**.

   The Create Cloud Storage Pool dialog box appears.

3. Enter the following information:

Field	Description
Display Name	A name that briefly describes the Cloud Storage Pool and its purpose. Use a name that will be easy to identify when you configure ILM rules.
Provider Type	Which cloud provider you will use for this Cloud Storage Pool: • Amazon S3 (select this option for an S3 or C2S S3 Cloud Storage Pool) • Azure Blob Storage **Note:** When you select a Provider Type, the Service Endpoint, Authentication and Server Verification sections appear at the bottom on the page.

Field	Description
Bucket or Container	The name of the external S3 bucket or Azure container that was created for the Cloud Storage Pool. The name you specify here must exactly match the bucket or container's name or Cloud Storage Pool creation will fail. You cannot change this value after the Cloud Storage Pool is saved.

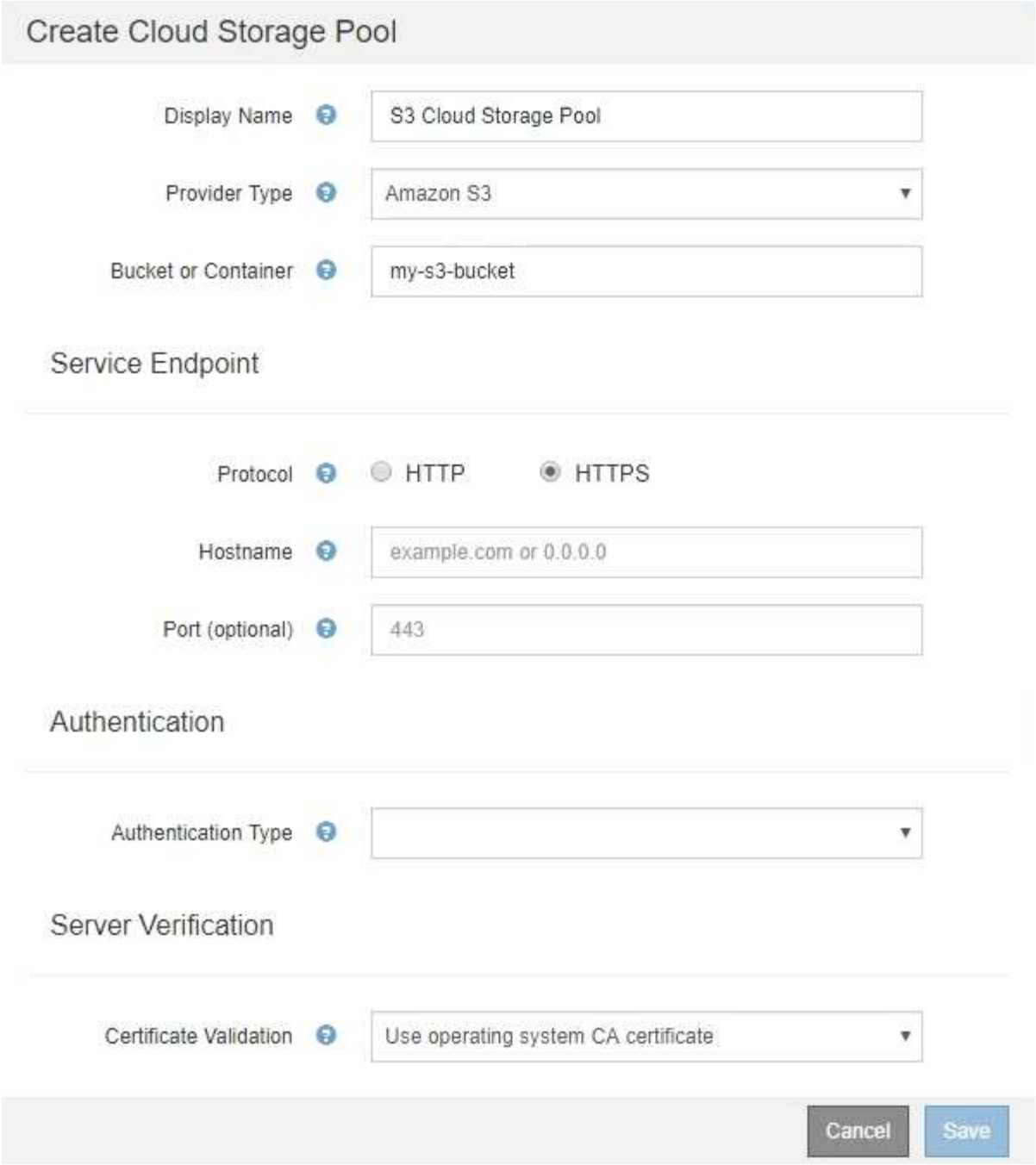
4. Complete the Service Endpoint, Authentication and Server Verification sections of the page, based on the selected provider type.
   - S3: Specifying authentication details for a Cloud Storage Pool
   - C2S S3: Specifying authentication details for a Cloud Storage Pool
   - Azure: Specifying authentication details for a Cloud Storage Pool

S3: Specifying authentication details for a Cloud Storage Pool

When you create a Cloud Storage Pool for S3, you must select the type of authentication that is required for the Cloud Storage Pool endpoint. You can specify Anonymous or enter an Access Key ID and Secret Access Key.

What you'll need

- You must have entered the basic information for the Cloud Storage Pool and specified **Amazon S3** as the provider type.



- If you are using access key authentication, you must know the Access Key ID and Secret Access Key for the external S3 bucket.

Steps

1. In the **Service Endpoint** section, provide the following information:
   a. Select which protocol to use when connecting to the Cloud Storage Pool.

      The default protocol is HTTPS.

   b. Enter the server hostname or IP address of the Cloud Storage Pool.

      For example:

      `s3-aws-region.amazonaws.com`

> Do not include the bucket name in this field. You include the bucket name in the **Bucket or Container** field.

c. Optionally, specify the port that should be used when connecting to the Cloud Storage Pool.

   Leave this field blank to use the default port: port 443 for HTTPS or port 80 for HTTP.

2. In the **Authentication** section, select the type of authentication that is required for the Cloud Storage Pool endpoint.

Option	Description
Access Key	An Access Key ID and Secret Access Key are required to access the Cloud Storage Pool bucket.
Anonymous	Everyone has access to the Cloud Storage Pool bucket. An Access Key ID and Secret Access Key are not required.
CAP (C2S Access Portal)	Used for C2S S3 only. Go to C2S S3: Specifying authentication details for a Cloud Storage Pool.

3. If you selected Access Key, enter the following information:

Option	Description
Access Key ID	The Access Key ID for the account that owns the external bucket.
Secret Access Key	The associated Secret Access Key.

4. In the Server Verification section, select which method should be used to validate the certificate for TLS connections to the Cloud Storage Pool:

Option	Description
Use operating system CA certificate	Use the default CA certificates installed on the operating system to secure connections.
Use custom CA certificate	Use a custom CA certificate. Click **Select New**, and upload the PEM-encoded CA certificate.
Do not verify certificate	The certificate used for the TLS connection is not verified.

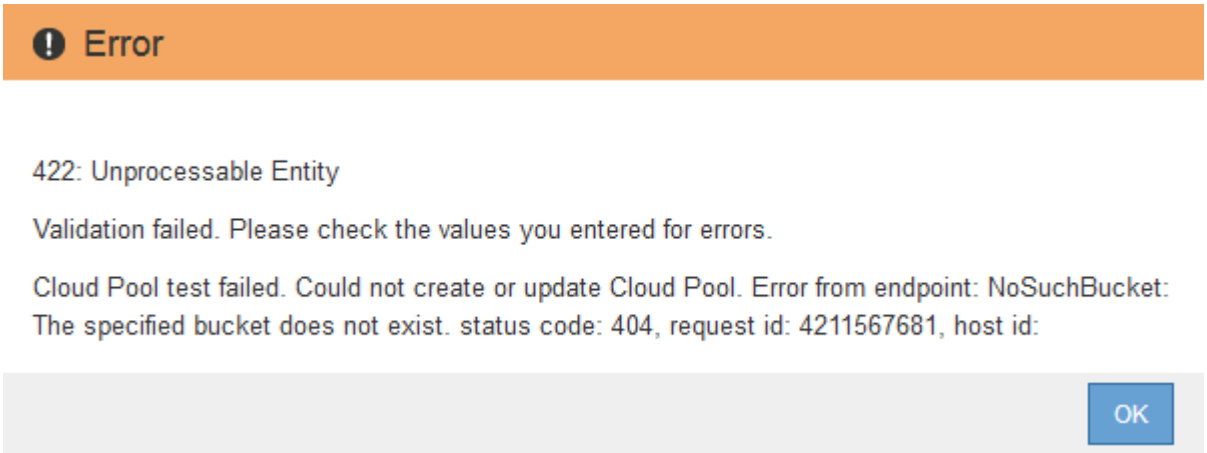
5. Click **Save**.

When you save a Cloud Storage Pool, StorageGRID does the following:

- Validates that the bucket and the service endpoint exist and that they can be reached using the credentials that you specified.
- Writes a marker file to the bucket to identify the bucket as a Cloud Storage Pool. Never remove this file,

which is named `x-ntap-sgws-cloud-pool-uuid`.

If Cloud Storage Pool validation fails, you receive an error message that explains why validation failed. For example, an error might be reported if there is a certificate error or if the bucket you specified does not already exist.



See the instructions for troubleshooting Cloud Storage Pools, resolve the issue, and then try saving the Cloud Storage Pool again.

Related information

Troubleshooting Cloud Storage Pools

C2S S3: Specifying authentication details for a Cloud Storage Pool

To use the Commercial Cloud Services (C2S) S3 service as a Cloud Storage Pool, you must configure C2S Access Portal (CAP) as the authentication type, so that StorageGRID can request temporary credentials to access the S3 bucket in your C2S account.

What you'll need

- You must have entered the basic information for an Amazon S3 Cloud Storage Pool, including the service endpoint.
- You must know the complete URL that StorageGRID will use to obtain temporary credentials from the CAP server, including all the required and optional API parameters assigned to your C2S account.
- You must have a server CA certificate issued by an appropriate Government Certificate Authority (CA). StorageGRID uses this certificate to verify the identity of the CAP server. The server CA certificate must use PEM encoding.
- You must have a client certificate issued by an appropriate Government Certificate Authority (CA). StorageGRID uses this certificate to identity itself to the CAP server. The client certificate must use PEM encoding and must have been granted access to your C2S account.
- You must have a PEM-encoded private key for the client certificate.
- If the private key for the client certificate is encrypted, you must have the passphrase for decrypting it.

Steps

1. In the **Authentication** section, select **CAP (C2S Access Portal)** from the **Authentication Type** drop-down.

   The CAP C2S authentication fields appear.

Create Cloud Storage Pool

Display Name: S3 Cloud Storage Pool

Provider Type: Amazon S3

Bucket or Container: my-s3-bucket

Service Endpoint

Protocol: HTTP HTTPS

Hostname: s3-aws-region.amazonaws.com

Port (optional): 443

Authentication

Authentication Type: CAP (C2S Access Portal)

Temporary Credentials URL: https://example.com/CAP/api/v1/credentials?agency=my

Server CA Certificate: Select New

Client Certificate: Select New

Client Private Key: Select New

Client Private Key Passphrase (optional):

Server Verification

Certificate Validation: Use operating system CA certificate

Cancel Save

2. Provide the following information:
   a. For **Temporary Credentials URL**, enter the complete URL that StorageGRID will use to obtain temporary credentials from the CAP server, including all the required and optional API parameters assigned to your C2S account.
   b. For **Server CA Certificate**, click **Select New**, and upload the PEM-encoded CA certificate that StorageGRID will use to verify the CAP server.
   c. For **Client Certificate**, click **Select New**, and upload the PEM-encoded certificate that StorageGRID will use to identify itself to the CAP server.
   d. For **Client Private Key**, click **Select New**, and upload the PEM-encoded private key for the client certificate.

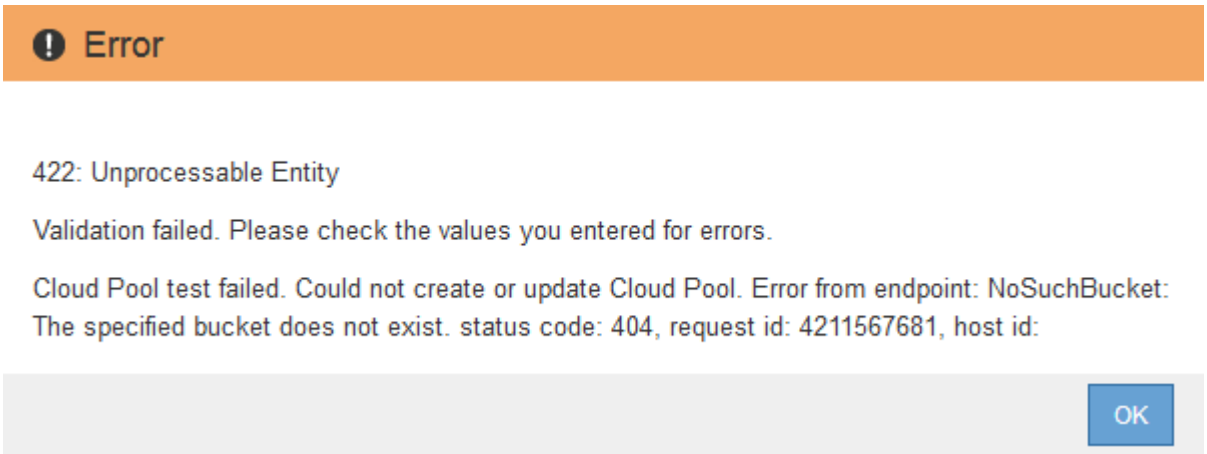
      If the private key is encrypted, the traditional format must be used. (PKCS #8 encrypted format is not supported.)

   e. If the client private key is encrypted, enter the passphrase for decrypting the client private key. Otherwise, leave the **Client Private Key Passphrase** field blank.
3. In the Server Verification section, provide the following information:
   a. For **Certificate Validation**, select **Use custom CA certificate**.
   b. Click **Select New**, and upload the PEM-encoded CA certificate.
4. Click **Save**.

When you save a Cloud Storage Pool, StorageGRID does the following:

- Validates that the bucket and the service endpoint exist and that they can be reached using the credentials that you specified.
- Writes a marker file to the bucket to identify the bucket as a Cloud Storage Pool. Never remove this file, which is named `x-ntap-sgws-cloud-pool-uuid`.

If Cloud Storage Pool validation fails, you receive an error message that explains why validation failed. For example, an error might be reported if there is a certificate error or if the bucket you specified does not already exist.



See the instructions for troubleshooting Cloud Storage Pools, resolve the issue, and then try saving the Cloud Storage Pool again.

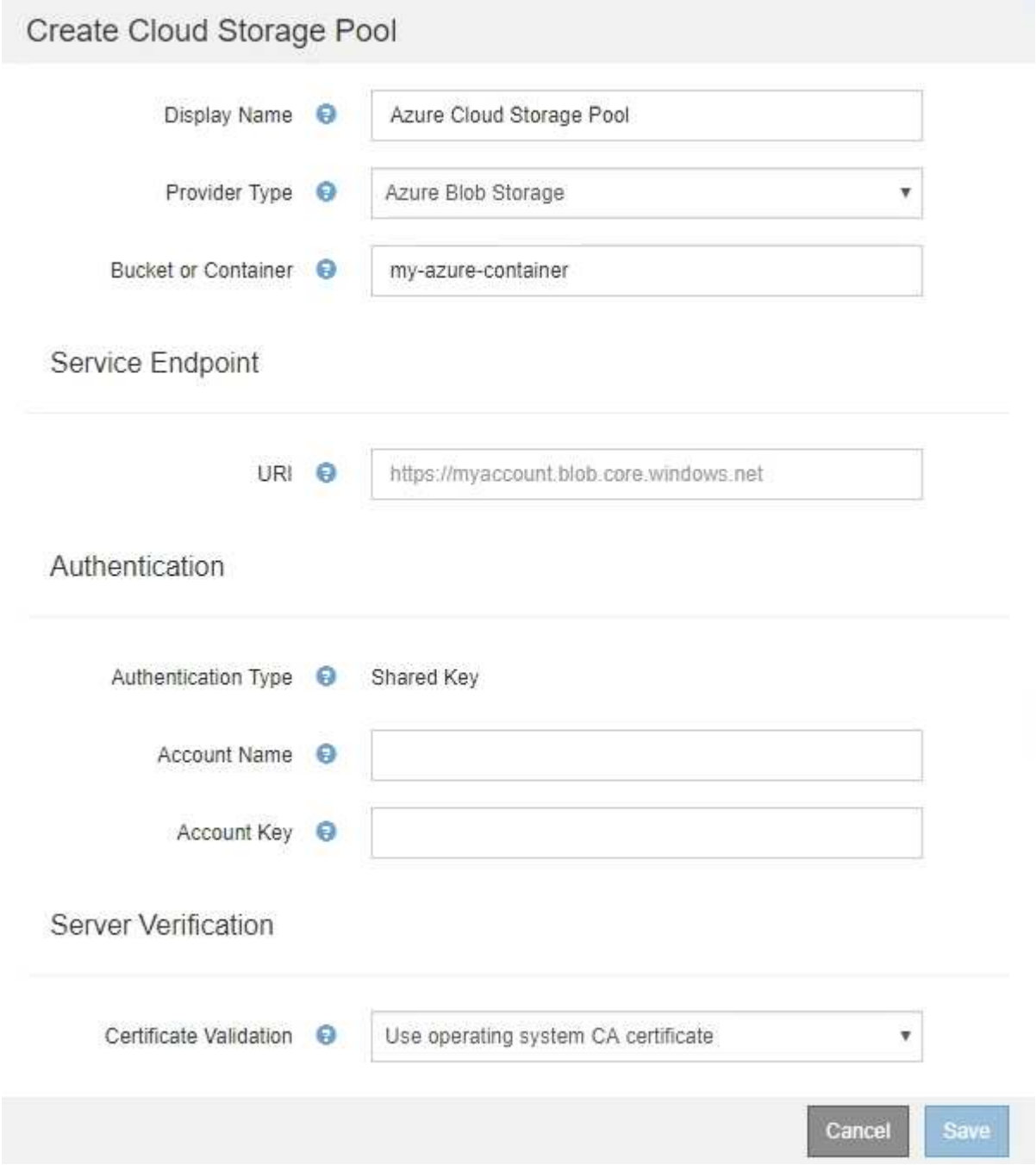
Related information

Azure: Specifying authentication details for a Cloud Storage Pool

When you create a Cloud Storage Pool for Azure Blob storage, you must specify an account name and account key for the external container that StorageGRID will use to store objects.

What you'll need

- You must have entered the basic information for the Cloud Storage Pool and specified **Azure Blob Storage** as the provider type. **Shared Key** appears in the **Authentication Type** field.



- You must know the Uniform Resource Identifier (URI) used to access the Blob storage container used for the Cloud Storage Pool.

- You must know the name of the storage account and the secret key. You can use the Azure portal to find these values.

Steps

1. In the **Service Endpoint** section, enter the Uniform Resource Identifier (URI) used to access the Blob storage container used for the Cloud Storage Pool.

   Specify the URI in one of the following formats:

   - `https://host:port`
   - `http://host:port`

   If you do not specify a port, by default port 443 is used for HTTPS URIs and port 80 is used for HTTP URIs.

   Example URI for Azure Blob storage container:
   `https://myaccount.blob.core.windows.net`

2. In the **Authentication** section, provide the following information:

   a. For **Account Name**, enter the name of the Blob storage account that owns the external service container.

   b. For **Account Key**, enter the secret key for the Blob storage account.

   For Azure endpoints, you must use Shared Key authentication.

3. In the **Server Verification** section, select which method should be used to validate the certificate for TLS connections to the Cloud Storage Pool:

Option	Description
Use operating system CA certificate	Use the default CA certificates installed on the operating system to secure connections.
Use custom CA certificate	Use a custom CA certificate. Click **Select New**, and upload the PEM-encoded certificate.
Do not verify certificate	The certificate used for the TLS connection is not verified.

4. Click **Save**.

When you save a Cloud Storage Pool, StorageGRID does the following:

- Validates that the container and the URI exist and that they can be reached using the credentials that you specified.
- Writes a marker file to the container to identify it as a Cloud Storage Pool. Never remove this file, which is named `x-ntap-sgws-cloud-pool-uuid`.

If Cloud Storage Pool validation fails, you receive an error message that explains why validation failed. For example, an error might be reported if there is a certificate error or if the container you specified does not already exist.

See the instructions for troubleshooting Cloud Storage Pools, resolve the issue, and then try saving the Cloud Storage Pool again.

Related information

Troubleshooting Cloud Storage Pools

Editing a Cloud Storage Pool

You can edit a Cloud Storage Pool to change its name, service endpoint, or other details; however, you cannot change the S3 bucket or Azure container for a Cloud Storage Pool.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have reviewed the guidelines for configuring Cloud Storage Pools.

Steps

1. Select **ILM** > **Storage Pools**.

   The Storage Pools page appears. The Cloud Storage Pools table lists the existing Cloud Storage Pools.

   Cloud Storage Pools

   You can add Cloud Storage Pools to ILM rules to store objects outside of the StorageGRID system. A Cloud Storage Pool defines how to access the external bucket or container where objects will be stored.

   + Create | Edit | Remove | Clear Error

	Pool Name	URI	Pool Type	Container	Used in ILM Rule	Last Error
◉	azure-endpoint	https://storagegrid.blob.core.windows.net	azure	azure-3	✔	
○	s3-endpoint	https://s3.amazonaws.com	s3	s3-1	✔	

   Displaying 2 pools.

2. Select the radio button for the Cloud Storage Pool you want to edit.
3. Click **Edit**.
4. As required, change the display name, service endpoint, authentication credentials, or certificate validation method.

   > You cannot change the provider type or the S3 bucket or Azure container for a Cloud Storage Pool.

   If you previously uploaded a server or client certificate, you can select **View Current** to review the certificate that is currently in use.

5. Click **Save**.

   When you save a Cloud Storage Pool, StorageGRID validates that the bucket or container and the service endpoint exist, and that they can be reached using the credentials that you specified.

   If Cloud Storage Pool validation fails, an error message is displayed. For example, an error might be reported if there is a certificate error.

See the instructions for troubleshooting Cloud Storage Pools, resolve the issue, and then try saving the Cloud Storage Pool again.

Related information

Considerations for Cloud Storage Pools

Troubleshooting Cloud Storage Pools

Removing a Cloud Storage Pool

You can remove a Cloud Storage Pool that is not used in an ILM rule and that does not contain object data.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You have confirmed that the S3 bucket or Azure container does not contain any objects. An error occurs if you attempt to remove a Cloud Storage Pool if it contains objects. See "Troubleshooting Cloud Storage Pools."

> When you create a Cloud Storage Pool, StorageGRID writes a marker file to the bucket or container to identify it as a Cloud Storage Pool. Do not remove this file, which is named `x-ntap-sgws-cloud-pool-uuid`.

- You have already removed any ILM rules that might have used the pool.

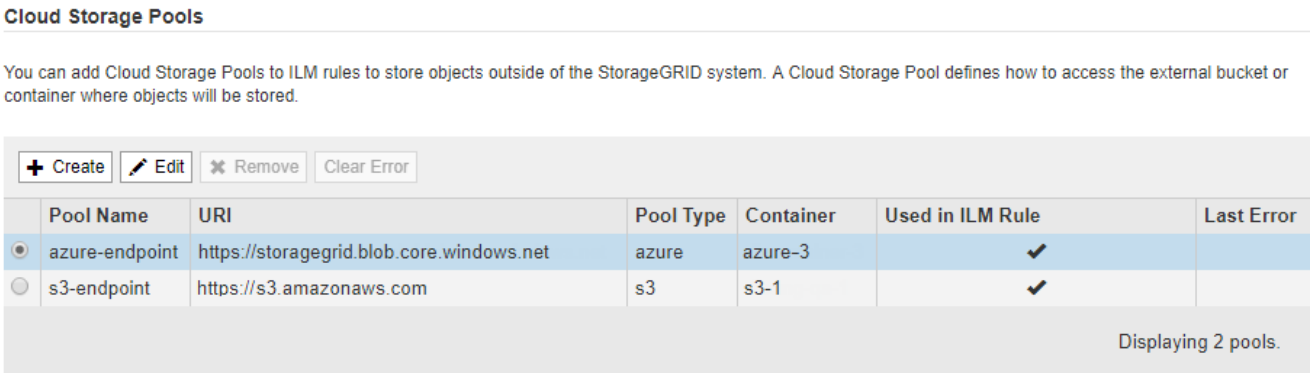
Steps

1. Select **ILM** > **Storage Pools**.

   The Storage Pools page appears.

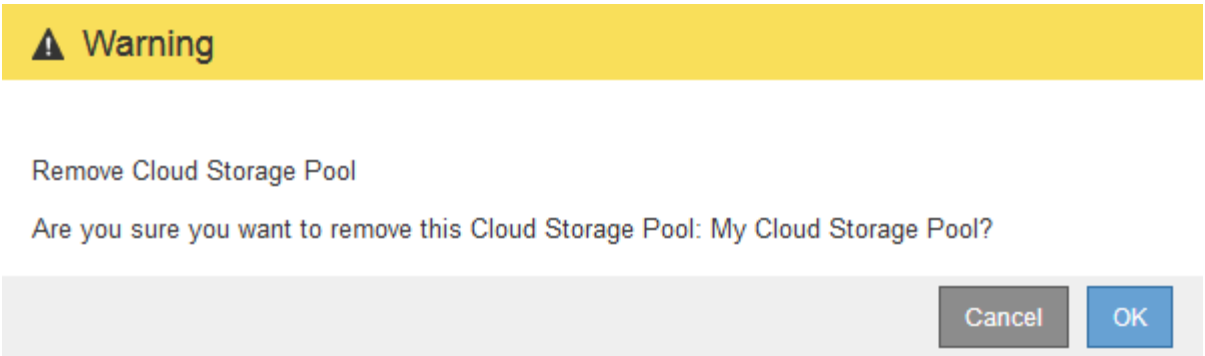
2. Select the radio button for a Cloud Storage Pool that is not currently used in an ILM rule.

   You cannot remove a Cloud Storage Pool if it is used in an ILM rule. The **Remove** button is disabled.



3. Click **Remove**.

   A confirmation warning is displayed.



4. Click **OK**.

   The Cloud Storage Pool is removed.

Related information

Troubleshooting Cloud Storage Pools

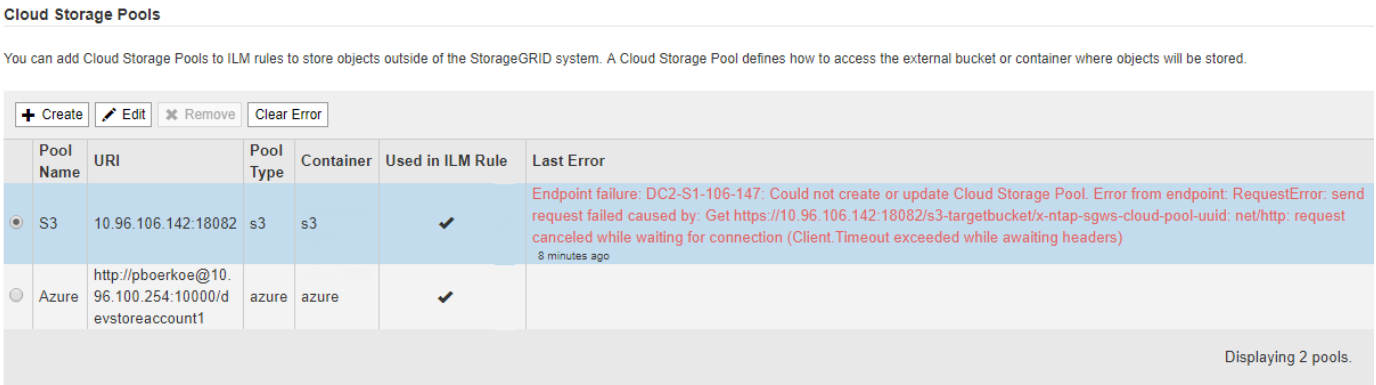
Troubleshooting Cloud Storage Pools

If you encounter errors when creating, editing, or deleting a Cloud Storage Pool, use these troubleshooting steps to help resolve the issue.

Determining if an error has occurred

StorageGRID performs a simple health check on every Cloud Storage Pool once a minute to ensure that the Cloud Storage Pool can be accessed and that it is functioning correctly. If the health check detects an issue, a message is shown in the Last Error column of the Cloud Storage Pools table on the Storage Pools page.

The table shows the most recent error detected for each Cloud Storage Pool and indicates how long ago the error occurred.

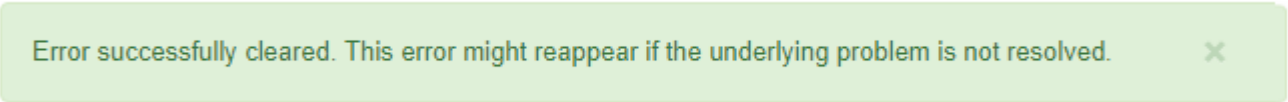


In addition, a **Cloud Storage Pool connectivity error** alert is triggered if the health check detects that one or more new Cloud Storage Pool errors have occurred within the past 5 minutes. If you receive an email notification for this alert, go to the Storage Pool page (select **ILM** > **Storage Pools**), review the error messages in the Last Error column, and refer to the troubleshooting guidelines below.

Checking if an error has been resolved

After resolving any underlying issues, you can determine if the error has been resolved. From the Cloud Storage Pool page, select the radio button for the endpoint, and click **Clear Error**. A confirmation message

indicates that StorageGRID has cleared the error for the Cloud Storage Pool.



If the underlying problem has been resolved, the error message is no longer displayed. However, if the underlying problem has not been fixed (or if a different error is encountered), the error message will be shown in the Last Error column within a few minutes.

Error: This Cloud Storage Pool contains unexpected content

You might encounter this error when you try to create, edit, or delete a Cloud Storage Pool. This error occurs if the bucket or container includes the `x-ntap-sgws-cloud-pool-uuid` marker file, but that file does not have the expected UUID.

Typically, you will only see this error if you are creating a new Cloud Storage Pool and another instance of StorageGRID is already using the same Cloud Storage Pool.

Try these steps to correct the issue:

- Check to make sure that no one in your organization is also using this Cloud Storage Pool.
- Delete the `x-ntap-sgws-cloud-pool-uuid` file and try configuring the Cloud Storage Pool again.

Error: Could not create or update Cloud Storage Pool. Error from endpoint

You might encounter this error when you try to create or edit a Cloud Storage Pool. This error indicates that some kind of connectivity or configuration issue is preventing StorageGRID from writing to the Cloud Storage Pool.

To correct the issue, review the error message from the endpoint.

- If the error message contains `Get *url*: EOF`, check that the service endpoint used for the Cloud Storage Pool does not use the HTTP protocol for a container or bucket that requires HTTPS.
- If the error message contains `Get *url*: net/http: request canceled while waiting for connection`, verify that the network configuration allows Storage Nodes to access the service endpoint used for the Cloud Storage Pool.
- For all other endpoint error messages, try one or more of the following:
  - Create an external container or bucket with the same name you entered for the Cloud Storage Pool, and try to save the new Cloud Storage Pool again.
  - Correct the container or bucket name you specified for the Cloud Storage Pool, and try to save the new Cloud Storage Pool again.

Error: Failed to parse CA certificate

You might encounter this error when you try to create or edit a Cloud Storage Pool. The error occurs if StorageGRID could not parse the certificate you entered when configuring the Cloud Storage Pool.

To correct the issue, check the CA certificate you provided for issues.

Error: A Cloud Storage Pool with this ID was not found

You might encounter this error when you try to edit or delete a Cloud Storage Pool. This error occurs if the endpoint returns a 404 response, which can mean either of the following:

- The credentials used for the Cloud Storage Pool do not have read permission for the bucket.
- The bucket used for the Cloud Storage Pool does not include the `x-ntap-sgws-cloud-pool-uuid` marker file.

Try one or more of these steps to correct the issue:

- Check that the user associated with the configured Access Key has the requisite permissions.
- Edit the Cloud Storage Pool with credentials that have the requisite permissions.
- If the permissions are correct, contact support.

Error: Could not check the content of the Cloud Storage Pool. Error from endpoint

You might encounter this error when you try to delete a Cloud Storage Pool. This error indicates that some kind of connectivity or configuration issue is preventing StorageGRID from reading the contents of the Cloud Storage Pool bucket.

To correct the issue, review the error message from the endpoint.

Error: Objects have already been placed in this bucket

You might encounter this error when you try to delete a Cloud Storage Pool. You cannot delete a Cloud Storage Pool if it contains data that was moved there by ILM, data that was in the bucket before you configured the Cloud Storage Pool, or data that was put in the bucket by some other source after the Cloud Storage Pool was created.

Try one or more of these steps to correct the issue:

- Follow the instructions for moving objects back to StorageGRID in “Lifecycle of a Cloud Storage Pool object.”
- If you are certain the remaining objects were not placed in the Cloud Storage Pool by ILM, manually delete the objects from the bucket.

> Never manually delete objects from a Cloud Storage Pool that might have been placed there by ILM. If you later attempt to access a manually deleted object from StorageGRID, the deleted object will not be found.

Error: Proxy encountered an external error while trying to reach the Cloud Storage Pool

You might encounter this error if you have configured a non-transparent Storage proxy between Storage Nodes and the external S3 endpoint used for the Cloud Storage Pool. This error occurs if the external proxy server cannot reach the Cloud Storage Pool endpoint. For example, the DNS server might not be able to resolve the hostname or there might be an external networking issue.

Try one or more of these steps to correct the issue:

- Check the settings for the Cloud Storage Pool (**ILM** > **Storage Pools**).
- Check the networking configuration of the Storage proxy server.

Related information

Lifecycle of a Cloud Storage Pool object

Configuring Erasure Coding profiles

You configure Erasure Coding profiles by associating a storage pool with an erasure-coding scheme, such as 6+3. Then, when you configure the placement instructions for an ILM rule, you can select the Erasure Coding profile. If an object matches the rule, data and parity fragments are created and distributed to the storage locations in the storage pool according to the erasure-coding scheme.

- Creating an Erasure Coding profile
- Renaming an Erasure Coding profile
- Deactivating an Erasure Coding profile

Creating an Erasure Coding profile

To create an Erasure Coding profile, you associate a storage pool containing Storage Nodes with an erasure-coding scheme. This association determines the number of data and parity fragments created and where the system distributes these fragments.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have created a storage pool that includes exactly one site or a storage pool that includes three or more sites. No erasure-coding schemes are available for a storage pool that has only two sites.

About this task

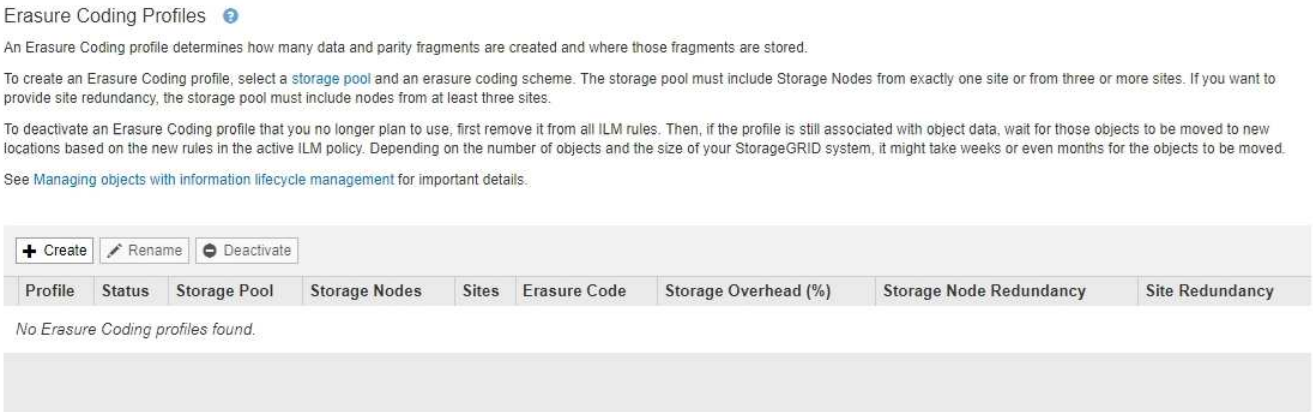
The storage pools used in Erasure Coding profiles must include exactly one site or three or more sites. If you want to provide site redundancy, the storage pool must have at least three sites.

> You must select a storage pool that contains Storage Nodes. You cannot use Archive Nodes for erasure-coded data.

Steps

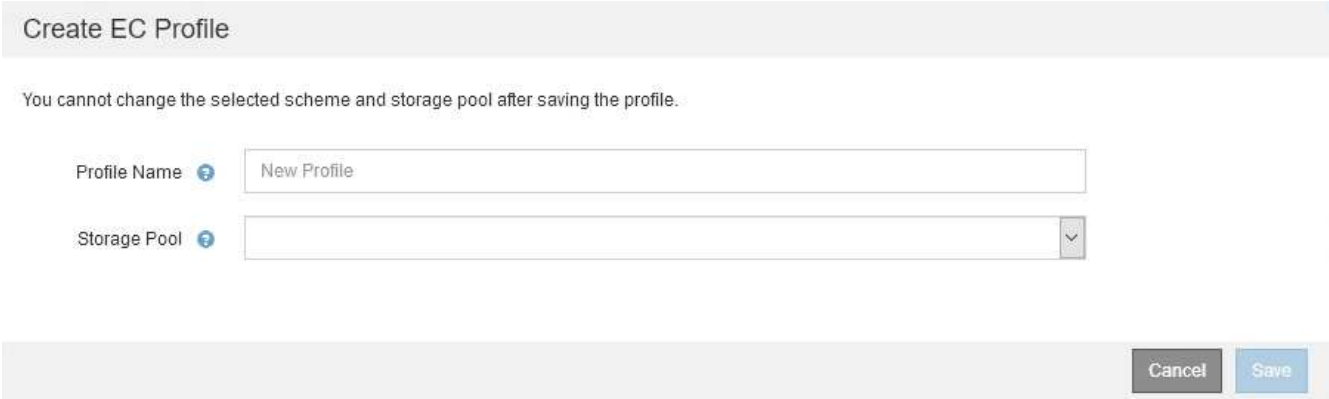
1. Select **ILM** > **Erasure Coding**.

   The Erasure Coding Profiles page appears.



2. Click **Create**.

   The Create EC Profile dialog box appears.



3. Enter a unique name for the Erasure Coding profile.

   Erasure Coding profile names must be unique. A validation error occurs if you use the name of an existing profile, even if that profile has been deactivated.

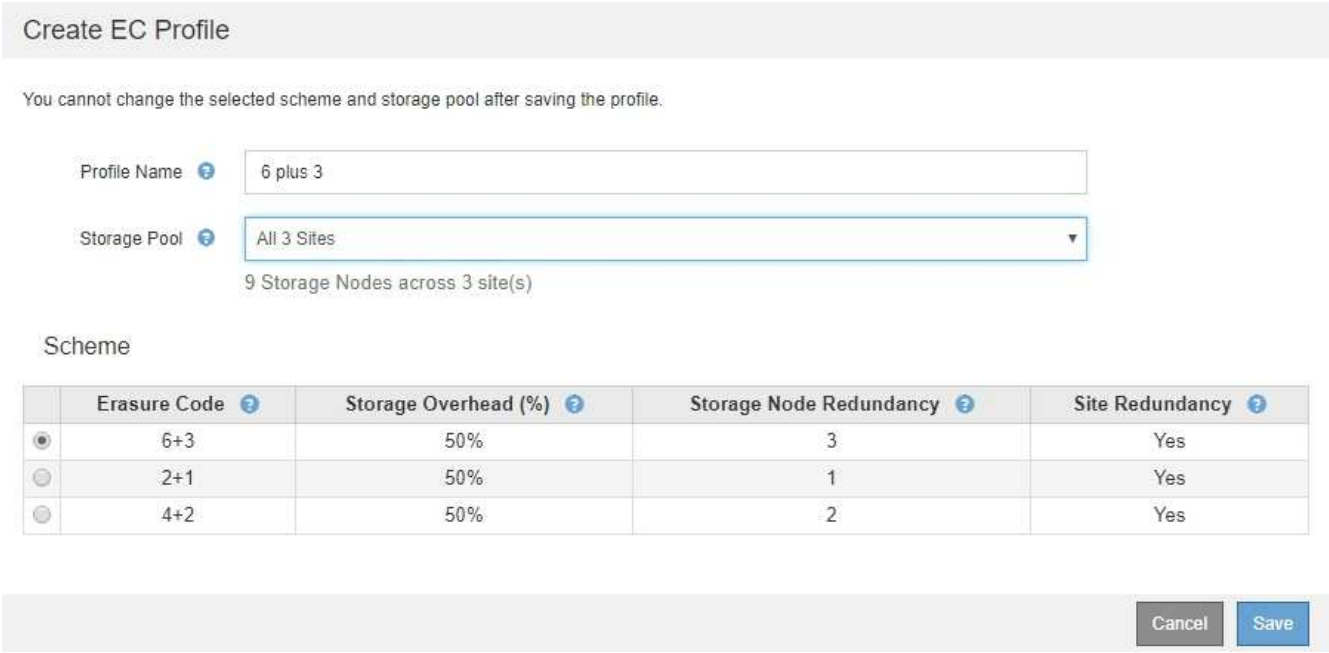
   > The Erasure Coding profile name is appended to the storage pool name in the placement instruction for an ILM rule.

4. Select the storage pool you created for this Erasure Coding profile.

   > If your grid currently includes only one site, you are prevented from using the default storage pool, All Storage Nodes, or any storage pool that includes the default site, All Sites. This behavior prevents the Erasure Coding profile from becoming invalid if a second site is added.

   > If a storage pool includes exactly two sites, you cannot use that storage pool for erasure coding. No erasure-coding schemes are available for a storage pool that has two sites.

When you select a storage pool, the list of available erasure-coding schemes is shown, based on the number of Storage Nodes and sites in the pool.



The following information is listed for each available erasure-coding scheme:

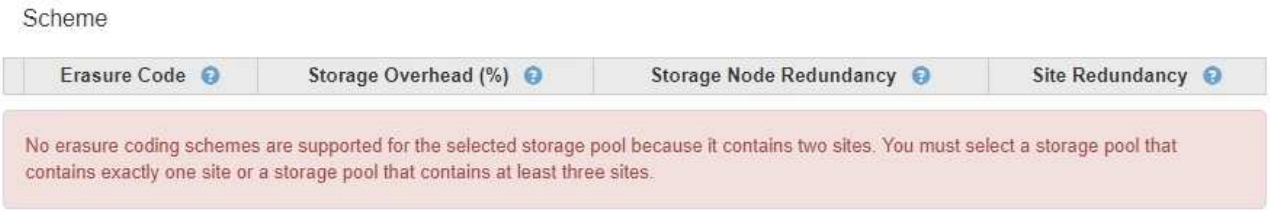
- **Erasure Code**: The name of the erasure-coding scheme in the following format: data fragments + parity fragments.
- **Storage Overhead (%)**: The additional storage required for parity fragments relative to the object's data size. Storage Overhead = Total number of parity fragments / Total number of data fragments.
- **Storage Node Redundancy**: The number of Storage Nodes that can be lost while still maintaining the ability to retrieve object data.
- **Site Redundancy**: Whether the selected erasure code allows the object data to be retrieved if a site is lost.

  To support site redundancy, the selected storage pool must include multiple sites, each with enough Storage Nodes to allow any site to be lost. For example, to support site redundancy using a 6+3 erasure-coding scheme, the selected storage pool must include at least three sites with at least three Storage Nodes at each site.

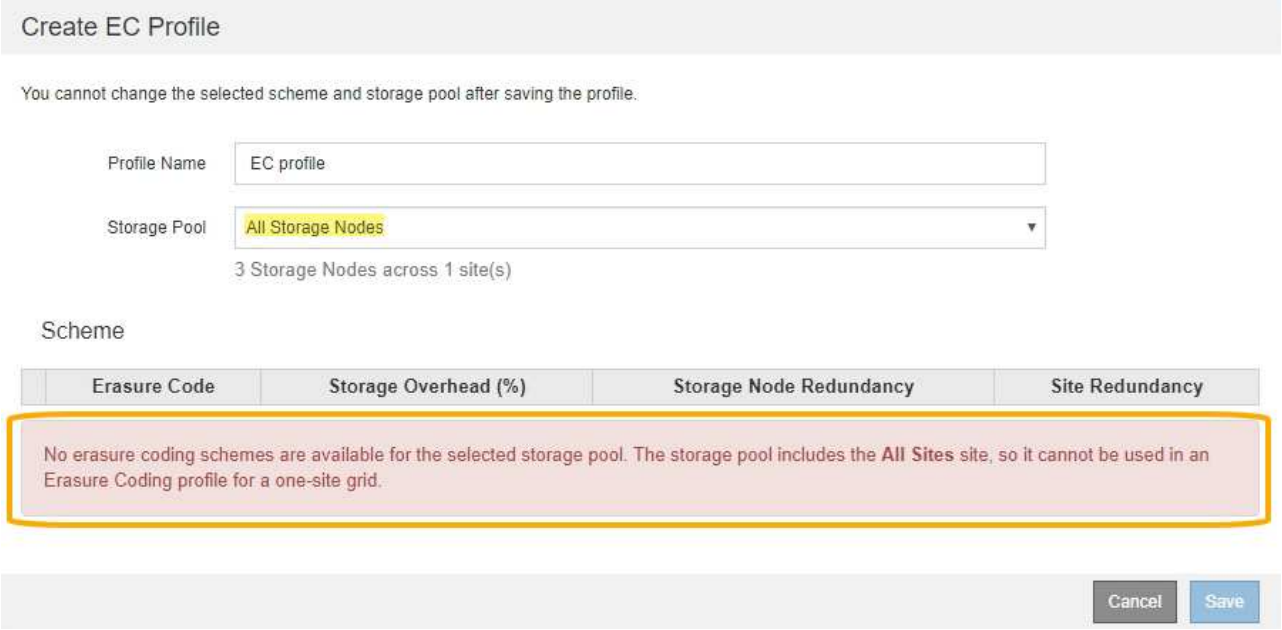
Messages are displayed in these cases:

- The storage pool you selected does not provide site redundancy. The following message is expected when the selected storage pool includes only one site. You can use this Erasure Coding profile in ILM rules to protect against node failures.

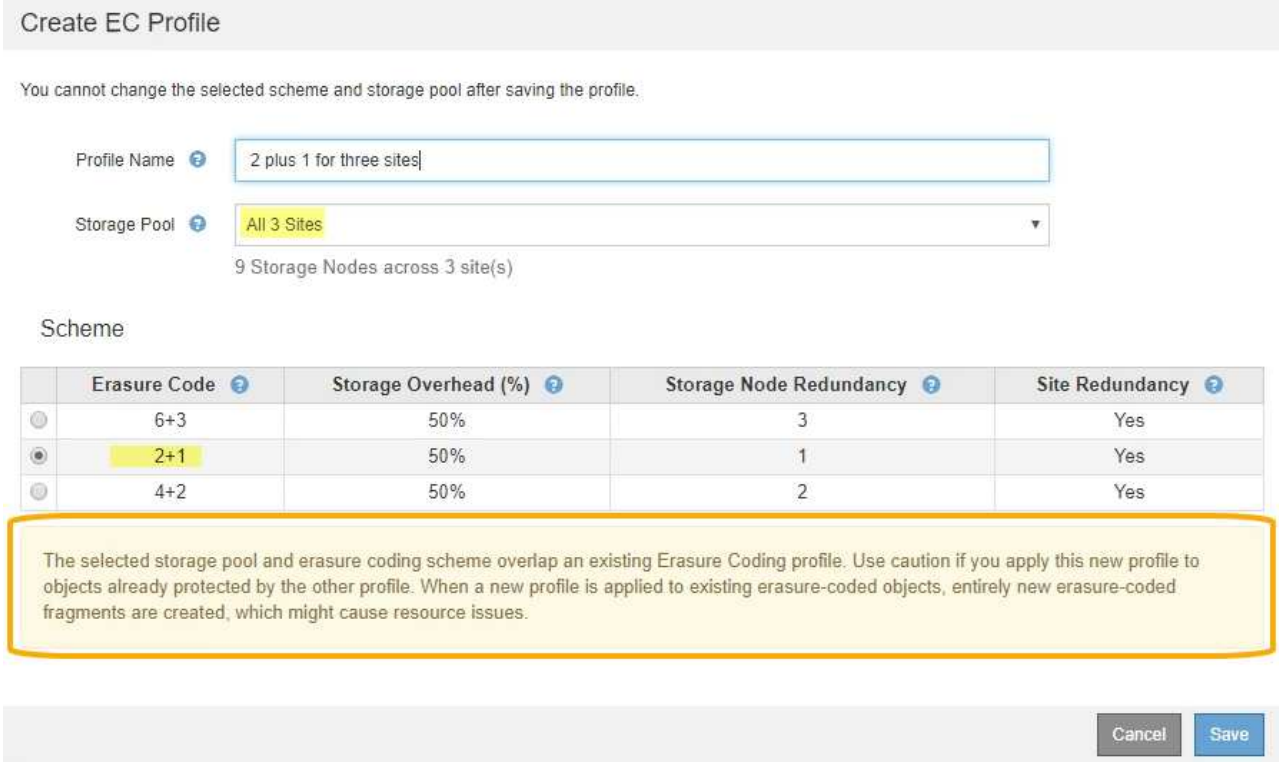
- The storage pool you selected does not satisfy the requirements for any erasure-coding scheme. For example, the following message is expected when the selected storage pool includes exactly two sites. If you want to use erasure coding to protect object data, you must select a storage pool with exactly one site or a storage pool with three or more sites.



- Your grid includes only one site and you selected the default storage pool, All Storage Nodes, or any storage pool that includes the default site, All Sites.



- The erasure-coding scheme and storage pool you selected overlap with another Erasure Coding profile.



In this example, a warning message appears because another Erasure Coding profile is using the 2+1 scheme and the storage pool for the other profile also uses one of the sites in the All 3 Sites storage pool.

While you are not prevented from creating this new profile, you must be very careful when you start using it in the ILM policy. If this new profile is applied to existing erasure-coded objects already protected by the other profile, StorageGRID will create an entirely new set of object fragments. It will not reuse the existing 2+1 fragments. Resource issues might occur when you migrate from one Erasure Coding profile to the other, even though the erasure-coding schemes are the same.

5. If more than one erasure-coding scheme is listed, select the one you want to use.

   When deciding which erasure-coding scheme to use, you should balance fault tolerance (achieved by having more parity segments) against the network traffic requirements for repairs (more fragments equals more network traffic). For example, when deciding between a 4+2 scheme and 6+3 scheme, select the 6+3 scheme if additional parity and fault tolerance are required. Select the 4+2 scheme if network resources are constrained to reduce network usage during node repairs.

6. Click **Save**.

Renaming an Erasure Coding profile

You might want to rename an Erasure Coding profile to make it more obvious what the profile does.

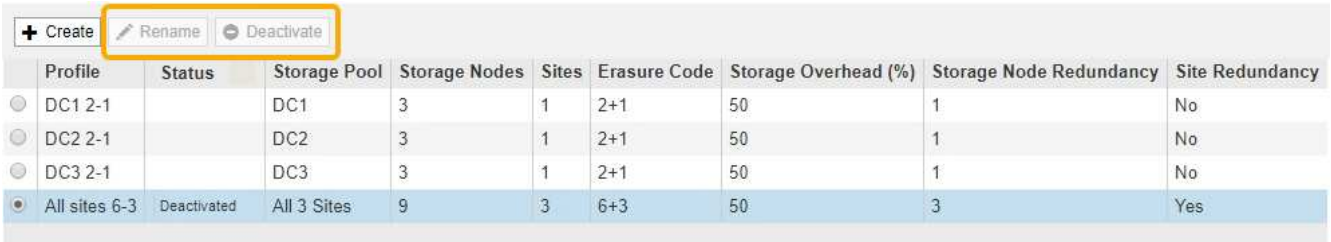
What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

Steps

1. Select **ILM** > **Erasure Coding**.

   The Erasure Coding Profiles page appears. The **Rename** and **Deactivate** buttons are both disabled.



Profile	Status	Storage Pool	Storage Nodes	Sites	Erasure Code	Storage Overhead (%)	Storage Node Redundancy	Site Redundancy
DC1 2-1		DC1	3	1	2+1	50	1	No
DC2 2-1		DC2	3	1	2+1	50	1	No
DC3 2-1		DC3	3	1	2+1	50	1	No
All sites 6-3	Deactivated	All 3 Sites	9	3	6+3	50	3	Yes

2. Select the profile you want to rename.

   The **Rename** and **Deactivate** buttons become enabled.

3. Click **Rename**.

   The Rename EC Profile dialog box appears.

4. Enter a unique name for the Erasure Coding profile.

   The Erasure Coding profile name is appended to the storage pool name in the placement instruction for an ILM rule.

> Erasure Coding profile names must be unique. A validation error occurs if you use the name of an existing profile, even if that profile has been deactivated.

5. Click **Save**.

Deactivating an Erasure Coding profile

You can deactivate an Erasure Coding profile if you no longer plan to use it and if the profile is not currently used in any ILM rules.

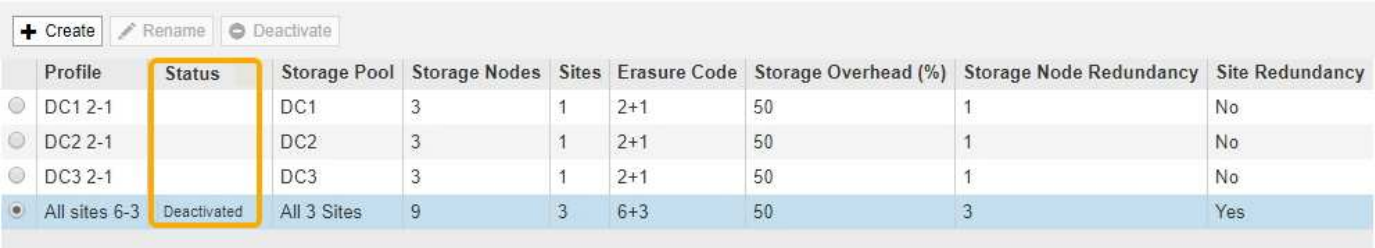
What you'll need

- You must be signed in to the Grid Manager using a supported browser.

- You must have specific access permissions.
- You must have confirmed that no erasure coded data repair operations or decommission procedures are in process. An error message is returned if you attempt to deactivate an Erasure Coding profile while either of these operations are in progress.

About this task

When you deactivate an Erasure Coding profile, the profile still appears on the Erasure Coding Profiles page, but its status is **Deactivated**.



Profile	Status	Storage Pool	Storage Nodes	Sites	Erasure Code	Storage Overhead (%)	Storage Node Redundancy	Site Redundancy
DC1 2-1		DC1	3	1	2+1	50	1	No
DC2 2-1		DC2	3	1	2+1	50	1	No
DC3 2-1		DC3	3	1	2+1	50	1	No
All sites 6-3	Deactivated	All 3 Sites	9	3	6+3	50	3	Yes

You can no longer use an Erasure Coding profile that has been deactivated. A deactivated profile is not shown when you create the placement instructions for an ILM rule. You cannot reactivate a deactivated profile.

StorageGRID prevents you from deactivating an Erasure Coding profile if either of the following is true:

- The Erasure Coding profile is currently used in an ILM rule.
- The Erasure Coding profile is no longer used in any ILM rules, but object data and parity fragments for the profile still exist.

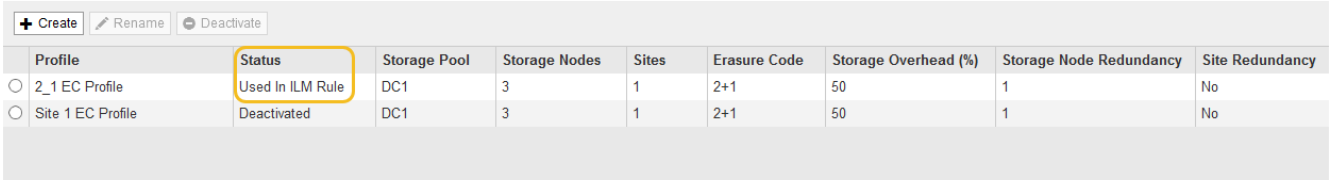
Steps

1. Select **ILM** > **Erasure Coding**.

   The Erasure Coding Profiles page appears. The **Rename** and **Deactivate** buttons are both disabled.

2. Review the **Status** column to confirm that the Erasure Coding profile you want to deactivate is not used in any ILM rules.

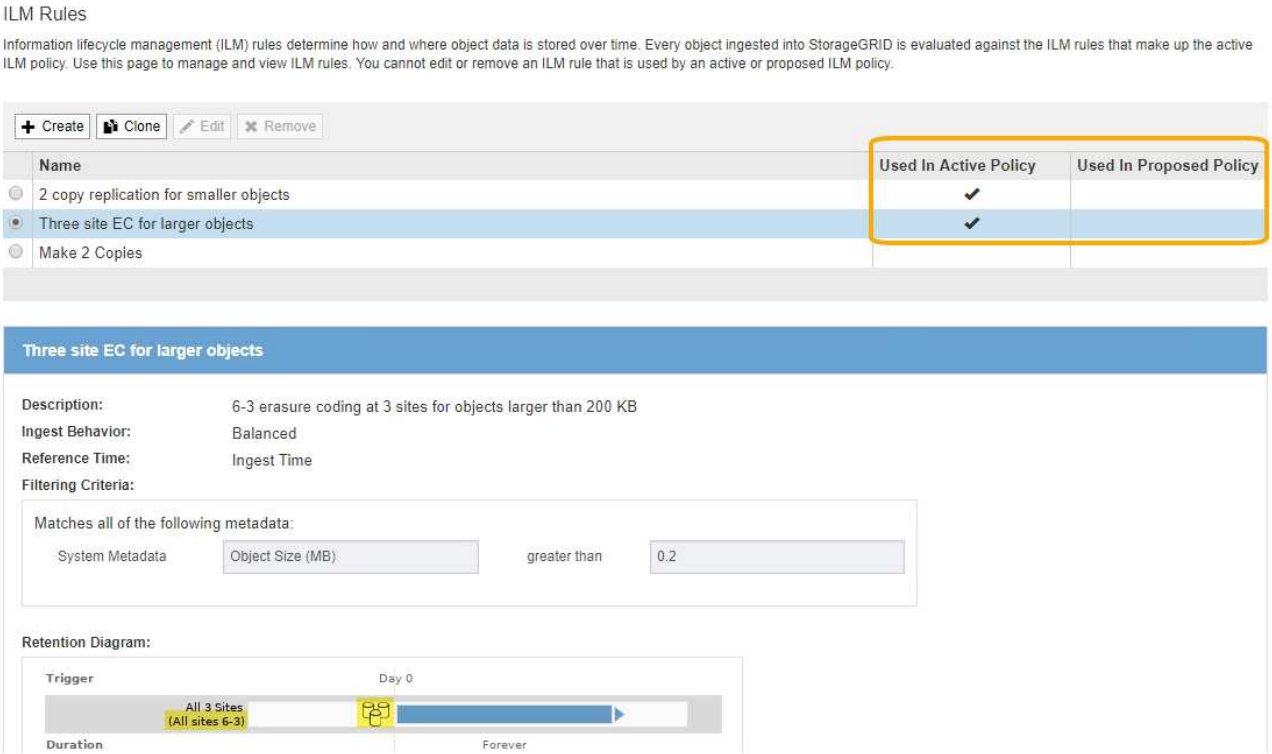
   You cannot deactivate an Erasure Coding profile if it is used in any ILM rule. In the example, the **2_1 EC Profile** is used in at least one ILM rule.



Profile	Status	Storage Pool	Storage Nodes	Sites	Erasure Code	Storage Overhead (%)	Storage Node Redundancy	Site Redundancy
2_1 EC Profile	Used In ILM Rule	DC1	3	1	2+1	50	1	No
Site 1 EC Profile	Deactivated	DC1	3	1	2+1	50	1	No

3. If the profile is used in an ILM rule, follow these steps:
   a. Select **ILM** > **Rules**.
   b. For each rule listed, select the radio button and review the retention diagram to determine if the rule uses the Erasure Coding profile you want to deactivate.

      In the example, the **Three site EC for larger objects** rule uses a storage pool called **All 3 Sites** and the **All sites 6-3** Erasure Coding profile. Erasure Coding profiles are represented by this icon:



c. If the ILM rule uses the Erasure Coding profile you want to deactivate, determine if the rule is used in either the active ILM policy or a proposed policy.

   In the example, the **Three site EC for larger objects** rule is used in the active ILM policy.

d. Complete the additional steps in the table, based on where the Erasure Coding profile is used.

Where has the profile been used?	Additional steps to perform before deactivating the profile	Refer to these additional instructions
Never used in any ILM rule	No additional steps required. Continue with this procedure.	*none*
In an ILM rule that has never been used in any ILM policy	1. Edit or delete all affected ILM rules. If you edit the rule, remove all placements that use the Erasure Coding profile. 2. Continue with this procedure.	Working with ILM rules and ILM policies

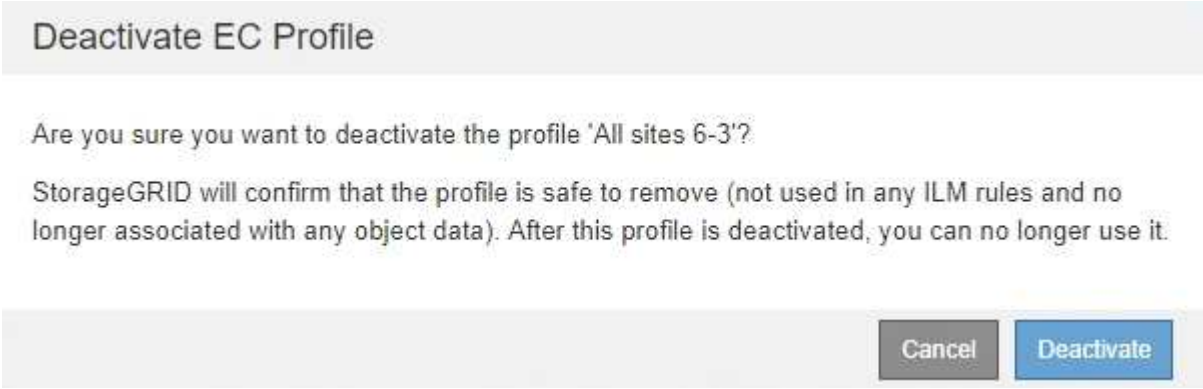
Where has the profile been used?	Additional steps to perform before deactivating the profile	Refer to these additional instructions
In an ILM rule that is currently in the active ILM policy	1. Clone the active policy. 2. Remove the ILM rule that uses the Erasure Coding profile. 3. Add one or more new ILM rules to ensure objects are protected. 4. Save, simulate, and activate the new policy. 5. Wait for the new policy to be applied and for existing objects to be moved to new locations based on the new rules you added. **Note:** Depending on the number of objects and the size of your StorageGRID system, it might take weeks or even months for ILM operations to move the objects to new locations, based on the new ILM rules. While you can safely attempt to deactivate an Erasure Coding profile while it is still associated with data, the deactivation operation will fail. An error message will inform you if the profile is not yet ready to be deactivated. 6. Edit or delete the rule you removed from the policy. If you edit the rule, remove all placements that use the Erasure Coding profile. 7. Continue with this procedure.	• Creating an ILM policy • Working with ILM rules and ILM policies
In an ILM rule that is currently in a proposed ILM policy	1. Edit the proposed policy. 2. Remove the ILM rule that uses the Erasure Coding profile. 3. Add one or more new ILM rules to ensure all objects are protected. 4. Save the proposed policy. 5. Edit or delete the rule you removed from the policy. If you edit the rule, remove all placements that use the Erasure Coding profile. 6. Continue with this procedure.	• Creating an ILM policy • Working with ILM rules and ILM policies

Where has the profile been used?	Additional steps to perform before deactivating the profile	Refer to these additional instructions
In an ILM rule that is in a historical ILM policy	1. Edit or delete the rule. If you edit the rule, remove all placements that use the Erasure Coding profile. (The rule will now appear as a historical rule in the historical policy.) 2. Continue with this procedure.	• Working with ILM rules and ILM policies

e. Refresh the Erasure Coding Profiles page to ensure that the profile is not used in an ILM rule.

4. If the profile is not used in an ILM rule, select the radio button and select **Deactivate**.

   The Deactivate EC Profile dialog box appears.



5. If you are sure you want to deactivate the profile, select **Deactivate**.
   - If StorageGRID is able to deactivate the Erasure Coding profile, its status is **Deactivated**. You can no longer select this profile for any ILM rule.
   - If StorageGRID is not able to deactivate the profile, an error message appears. For example, an error message appears if object data is still associated with this profile. You might need to wait several weeks before trying the deactivation process again.

Configuring regions (optional and S3 only)

ILM rules can filter objects based on the regions where S3 buckets are created, allowing you to store objects from different regions in different storage locations. If you want to use an S3 bucket region as a filter in a rule, you must first create the regions that can be used by the buckets in your system.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

About this task

When creating an S3 bucket, you can specify that the bucket be created in a specific region. Specifying a region allows the bucket to be geographically close to its users, which can help optimize latency, minimize costs, and address regulatory requirements.

When you create an ILM rule, you might want to use the region associated with an S3 bucket as an advanced filter. For example, you can design a rule that applies only to objects in S3 buckets created in the us-west-2 region. You can then specify that copies of those objects be placed on Storage Nodes at a data center site within that region to optimize latency.

When configuring regions, follow these guidelines:

- By default, all buckets are considered to belong to the us-east-1 region.
- You must create the regions using the Grid Manager before you can specify a non-default region when creating buckets using the Tenant Manager or Tenant Management API or with the LocationConstraint request element for S3 PUT Bucket API requests. An error occurs if a PUT Bucket request uses a region that has not been defined in StorageGRID.
- You must use the exact region name when you create the S3 bucket. Region names are case sensitive and must contain at least 2 and no more than 32 characters. Valid characters are numbers, letters, and hyphens.

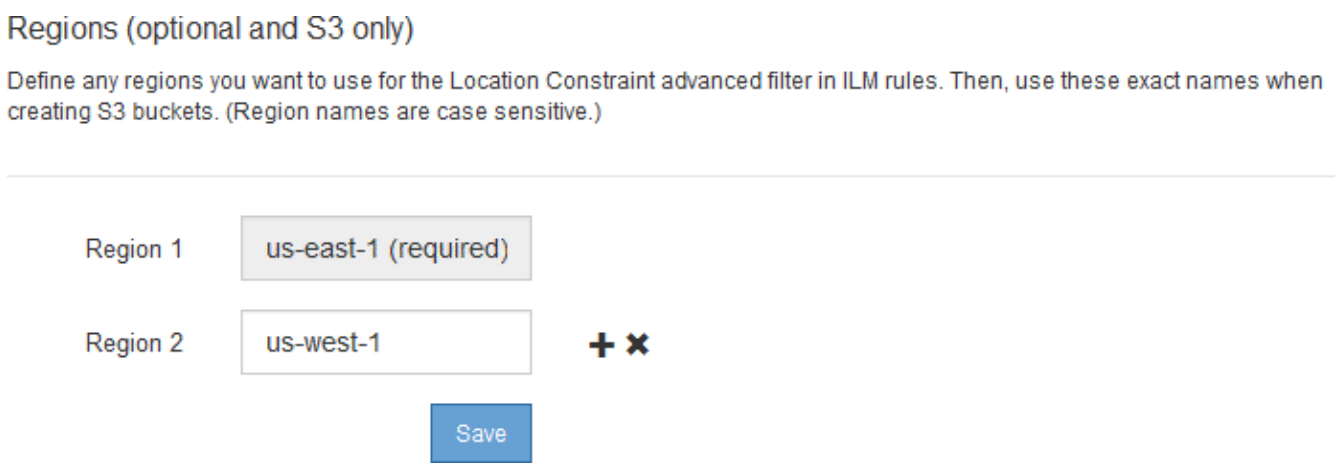
> EU is not considered to be an alias for eu-west-1. If you want to use the EU or eu-west-1 region, you must use the exact name.

- You cannot delete or modify a region if it is currently used within the active ILM policy or the proposed ILM policy.
- If the region used as the advanced filter in an ILM rule is invalid, it is still possible to add that rule to the proposed policy. However, an error occurs if you attempt to save or activate the proposed policy. (An invalid region can result if you use a region as an advanced filter in an ILM rule but you later delete that region, or if you use the Grid Management API to create a rule and specify a region that you have not defined.)
- If you delete a region after using it to create an S3 bucket, you will need to re-add the region if you ever want to use the Location Constraint advanced filter to find objects in that bucket.

Steps

1. Select **ILM** > **Regions**.

   The Regions page appears, with the currently defined regions listed. **Region 1** shows the default region, `us-east-1`, which cannot be modified or removed.

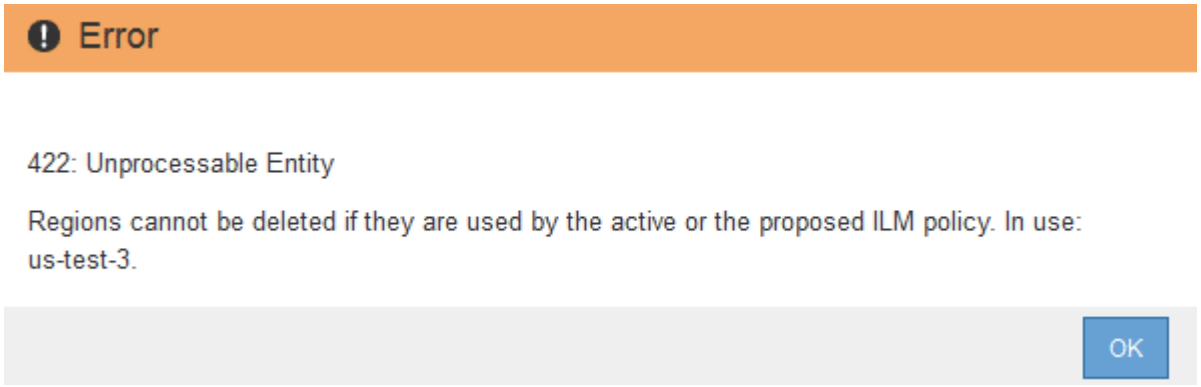
2. To add a region:
   a. Click the insert icon ✚ to the right of the last entry.

b. Enter the name of a region that you want to use when creating S3 buckets.

   You must use this exact region name as the LocationConstraint request element when you create the corresponding S3 bucket.

3. To remove an unused region, click the delete icon ✖.

   An error message appears if you attempt to remove a region that is currently used in the active policy or the proposed policy.



4. When you are done making changes, click **Save**.

   You can now select these regions from the **Location Constraint** list on the Advanced Filtering page of the Create ILM rule wizard.

Related information

Using advanced filters in ILM rules

Creating an ILM rule

ILM rules allow you to manage the placement of object data over time. To create an ILM rule, you use the Create ILM Rule wizard.

Before you begin

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- If you want to specify which tenant accounts this rule applies to, you must have the Tenant Accounts permission or you must know the account ID for each account.
- If you want the rule to filter objects on last access time metadata, Last Access Time updates must be enabled by bucket for S3 or by container for Swift.
- If you are creating replicated copies, you must have configured any storage pools or Cloud Storage Pools you plan to use.
- If you are creating erasure-coded copies, you must have configured an Erasure Coding profile.
- You must be familiar with the data-protection options for ingest.
- If you need to create a compliant rule for use with S3 Object Lock, you must be familiar with the requirements for S3 Object Lock.

To create the default ILM rule for a policy, use this procedure instead: Creating a default ILM rule.

About this task

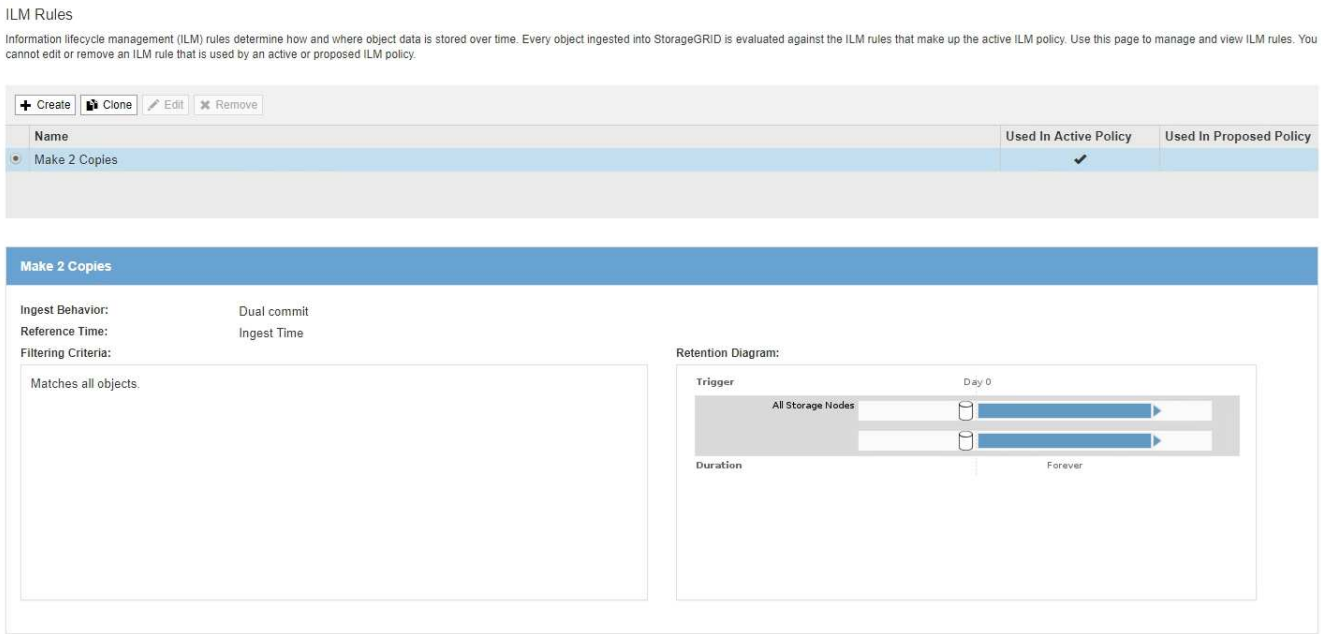
When creating ILM rules:

- Consider the StorageGRID system's topology and storage configurations.
- Consider what types of object copies you want to make (replicated or erasure coded) and the number of copies of each object that are required.
- Determine what types of object metadata are used in the applications that connect to the StorageGRID system. ILM rules filter objects based on their metadata.
- Consider where you want object copies to be placed over time.
- Decide which option to use for data protection option at ingest (Balanced, Strict, or Dual commit)

Steps

1. Select **ILM** > **Rules**.

   The ILM Rules page appears, with the stock rule, Make 2 Copies, selected.



   The ILM Rules page looks slightly different if the global S3 Object Lock setting has been enabled for the StorageGRID system. The summary table includes a **Compliant** column, and the details for the selected rule include a **Compliant** field.

2. Select **Create**.

   Step 1 (Define Basics) of the Create ILM Rule wizard appears. You use the Define basics page to define which objects the rule applies to.

Related information

Use S3

Use Swift

Configuring Erasure Coding profiles

Configuring storage pools

Using Cloud Storage Pools

Data-protection options for ingest

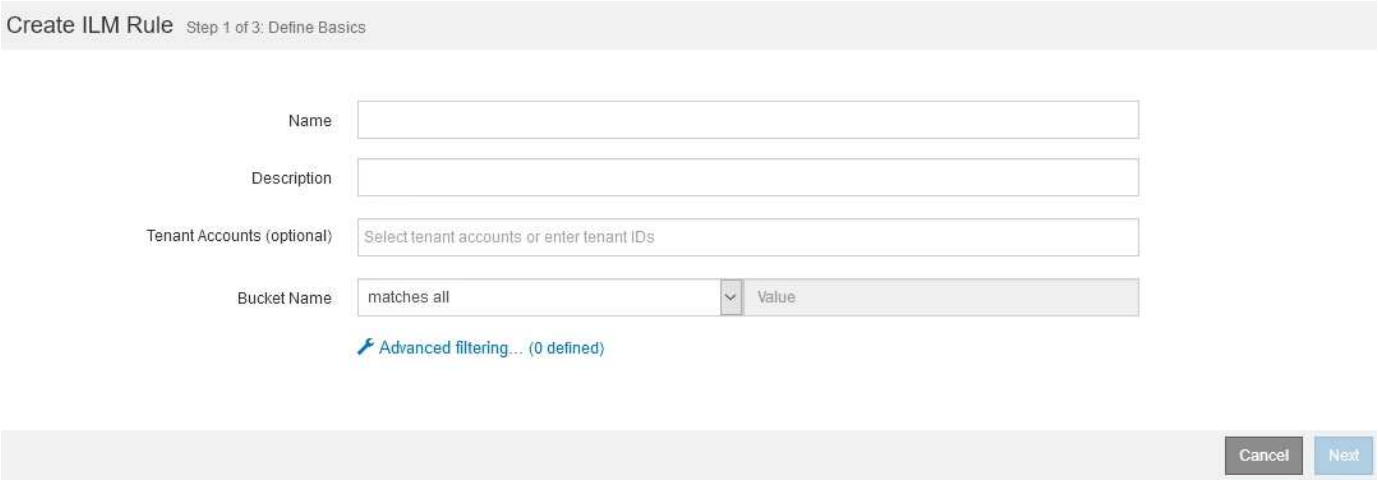
Managing objects with S3 Object Lock

Step 1 of 3: Define basics

Step 1 (Define Basics) of the Create ILM Rule wizard allows you to define the rule's basic and advanced filters.

About this task

When evaluating an object against an ILM rule, StorageGRID compares the object metadata to the rule's filters. If the object metadata matches all filters, StorageGRID uses the rule to place the object. You can design a rule to apply to all objects, or you can specify basic filters, such as one or more tenant accounts or bucket names, or advanced filters, such as the object's size or user metadata.



Steps

1. Enter a unique name for the rule in the **Name** field.

   You must enter between 1 and 64 characters.

2. Optionally, enter a short description for the rule in the **Description** field.

   You should describe the rule's purpose or function so you can recognize the rule later.

Name	Make 3 Copies
Description	Save 1 copy at 3 sites for 1 year. Then, save EC copy forever

3. Optionally, select one or more S3 or Swift tenant accounts to which this rule applies. If this rule applies to all tenants, leave this field blank.

If you do not have either the Root Access permission or the Tenant Accounts permission, you cannot select tenants from the list. Instead, enter the tenant ID or enter multiple IDs as a comma-delimited string.

4. Optionally, specify the S3 buckets or Swift containers to which this rule applies.

   If **matches all** is selected (default), the rule applies to all S3 buckets or Swift containers.

5. Optionally, select **Advanced filtering** to specify additional filters.

   If you do not configure advanced filtering, the rule applies to all objects that match the basic filters.

   > If this rule will create erasure-coded copies, select **Advanced filtering**. Then, add the **Object Size (MB)** advanced filter and set it to **greater than 0.2**. The size filter ensures that objects that are 2 MB or smaller will not be erasure coded.

6. Select **Next**.

   Step 2 (Define Placements) appears.

Related information

What ILM rule filtering is

Using advanced filters in ILM rules

Step 2 of 3: Define placements

Using advanced filters in ILM rules

Advanced filtering allows you to create ILM rules that apply only to specific objects based on their metadata. When you set up advanced filtering for a rule, you select the type of metadata you want to match, select an operator, and specify a metadata value. When objects are evaluated, the ILM rule is applied only to those objects that have metadata matching the advanced filter.

The table shows the types of metadata you can specify in advanced filters, the operators you can use for each type of metadata, and the metadata values expected.

Metadata type	Supported operators	Metadata value
Ingest Time (microseconds)	• equals • does not equal • less than • less than or equals • greater than • greater than or equals	Time and date the object was ingested. **Note:** To avoid resource issues when activating an new ILM policy, you can use the Ingest Time advanced filter in any rule that might change the location of large numbers of existing objects. Set Ingest Time to be greater than or equal to the approximate time when the new policy will go into effect to ensure that existing objects are not moved unnecessarily.

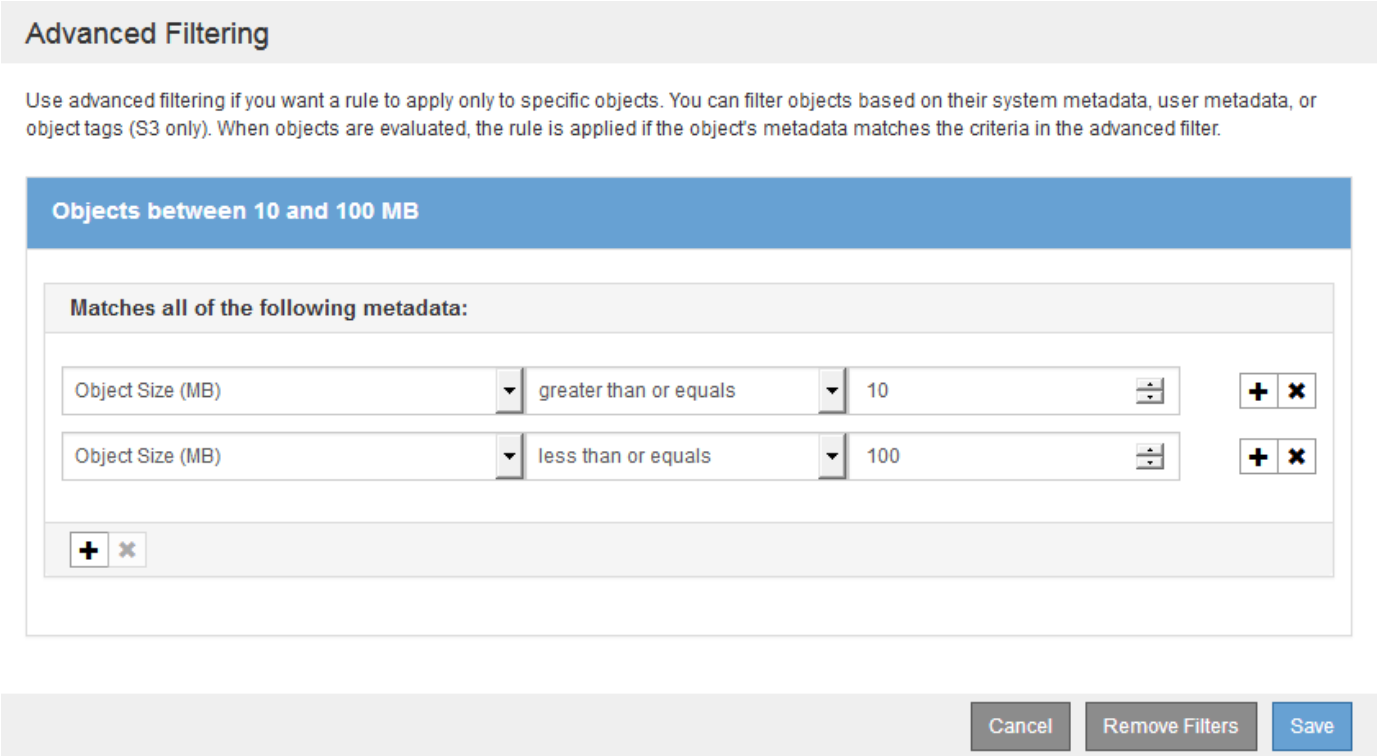
Metadata type	Supported operators	Metadata value
Key	• equals • does not equal • contains • does not contain • starts with • does not start with • ends with • does not end with	All or part of a unique S3 or Swift object key. For example, you might want to match objects that end with `.txt` or start with `test-object/`.
Last Access Time (microseconds)	• equals • does not equal • less than • less than or equals • greater than • greater than or equals • exists • does not exist	Time and date the object was last retrieved (read or viewed). **Note:** If you plan to use last access time as an advanced filter, Last Access Time updates must be enabled for the S3 bucket or Swift container. Using Last Access Time in ILM rules
Location Constraint (S3 only)	• equals • does not equal	The region where an S3 bucket was created. Use **ILM** > **Regions** to define the regions that are shown. **Note:** A value of us-east-1 will match objects in buckets created in the us-east-1 region as well as objects in buckets that have no region specified. Configuring regions (optional and S3 only)
Object Size (MB)	• equals • not equals • less than • less than or equals • greater than • greater than or equals	The object's size in MB. To filter on object sizes smaller than 1 MB, type in a decimal value. For example, set the **Object Size (MB)** advanced filter to **greater than 0.2** for any rule that makes erasure-coded copies. This setting ensures that erasure coding is not used for objects 200 KB or smaller. **Note:** Your browser type and locale settings control whether you need to use a period or a comma as the decimal separator.

Metadata type	Supported operators	Metadata value
User Metadata	• contains • ends with • equals • exists • does not contain • does not end with • does not equal • does not exist • does not start with • starts with	Key-value pair, where **User Metadata Name** is the key and **User Metadata Value** is the value. For example, to filter on objects that have user metadata of `color=blue`, specify `color` for **User Metadata Name**, `equals` for the operator, and `blue` for **User Metadata Value**. **Note:** User-metadata names are not case sensitive; user-metadata values are case sensitive.
Object Tag (S3 only)	• contains • ends with • equals • exists • does not contain • does not end with • does not equal • does not exist • does not start with • starts with	Key-value pair, where **Object Tag Name** is the key and **Object Tag Value** is the value. For example, to filter on objects that have an object tag of `Image=True`, specify `Image` for **Object Tag Name**, `equals` for the operator, and `True` for **Object Tag Value**. **Note:** Object tag names and object tag values are case sensitive. You must enter these items exactly as they were defined for the object.

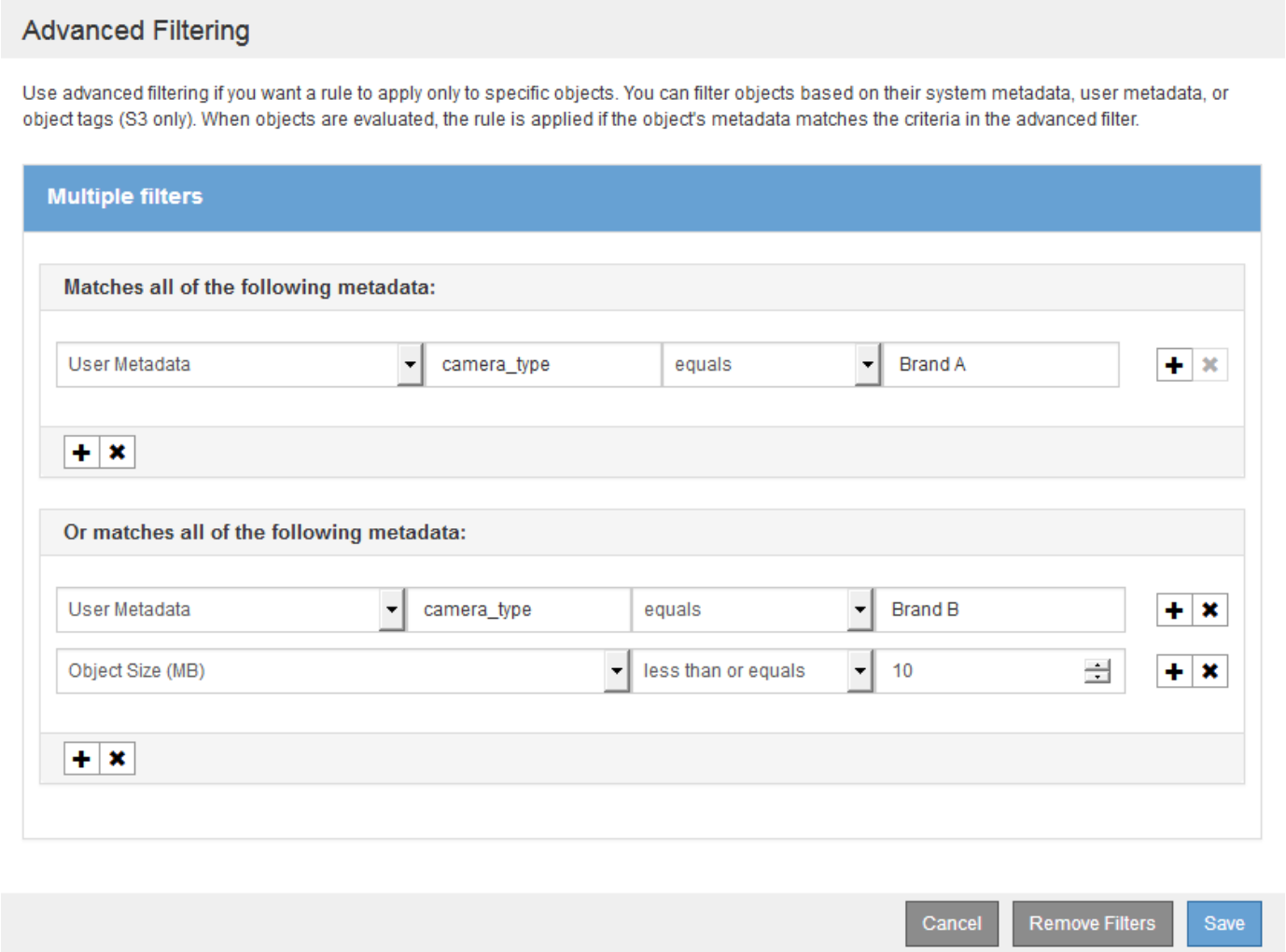
Specifying multiple metadata types and values

When you define advanced filtering, you can specify multiple types of metadata and multiple metadata values. For example, if you want a rule to match objects between 10 MB and 100 MB in size, you would select the **Object Size** metadata type and specify two metadata values.

- The first metadata value specifies objects greater than or equal to 10 MB.
- The second metadata value specifies objects less than or equal to 100 MB.



Using multiple entries allows you to have precise control over which objects are matched. In the following example, the rule applies to objects that have a Brand A or Brand B as the value of the camera_type user metadata. However, the rule only applies to those Brand B objects that are smaller than 10 MB.



Related information

Using Last Access Time in ILM rules

Configuring regions (optional and S3 only)

Step 2 of 3: Define placements

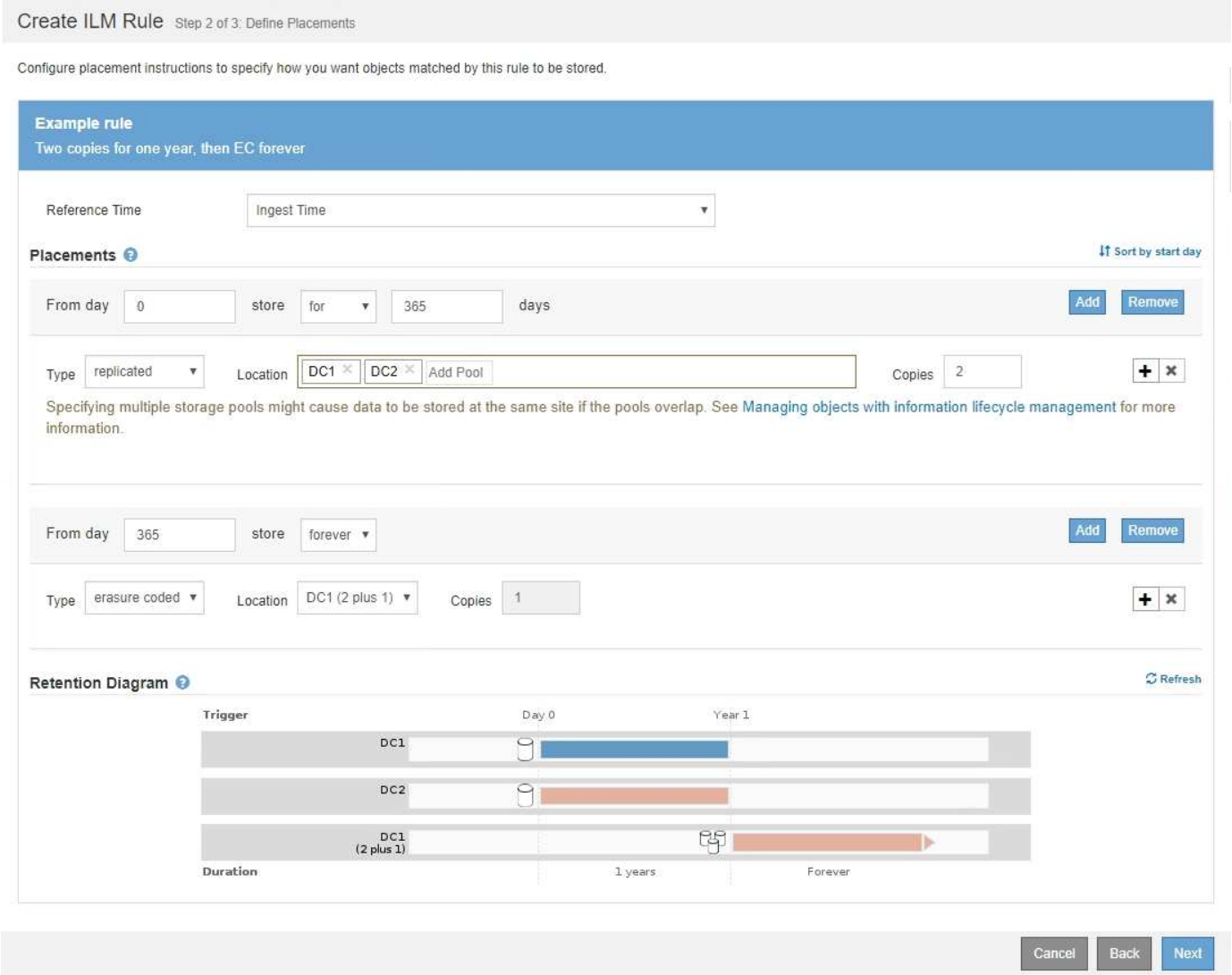
Step 2 (Define Placements) of the Create ILM Rule wizard allows you to define the placement instructions that determine how long objects are stored, the type of copies (replicated or erasure coded), the storage location, and the number of copies.

About this task

An ILM rule can include one or more placement instructions. Each placement instruction applies to a single period of time. When you use more than one instruction, the time periods must be contiguous, and at least one instruction must start on day 0. The instructions can continue either forever, or until you no longer require any object copies.

Each placement instruction can have multiple lines if you want to create different types of copies or use different locations during that time period.

This example ILM rule creates two replicated copies for the first year. Each copy is saved in a storage pool at a different site. After one year, a 2+1 erasure-coded copy is made and saved at only one site.



Steps

1. For **Reference Time**, select the type of time to use when calculating the start time for a placement instruction.

Option	Description
Ingest Time	The time when the object was ingested.
Last Access Time	The time when the object was last retrieved (read or viewed). **Note:** To use this option, updates to Last Access Time must be enabled for the S3 bucket or Swift container. Using Last Access Time in ILM rules

Option	Description
Noncurrent Time	The time an object version became noncurrent because a new version was ingested and replaced it as the current version. **Note:** Noncurrent Time applies only to S3 objects in versioning-enabled buckets. You can use this option to reduce the storage impact of versioned objects by filtering for noncurrent object versions. See “Example 4: ILM rules and policy for S3 versioned objects.”
User Defined Creation Time	A time specified in user-defined metadata.

> If you want to create a compliant rule, you must select **Ingest Time**.

2. In the **Placements** section, select a starting time and a duration for the first time period.

   For example, you might want to specify where to store objects for the first year (“day 0 for 365 days”). At least one instruction must start at day 0.

3. If you want to create replicated copies:
   a. From the **Type** drop-down list, select **replicated**.
   b. In the **Location** field, select **Add Pool** for each storage pool you want to add.

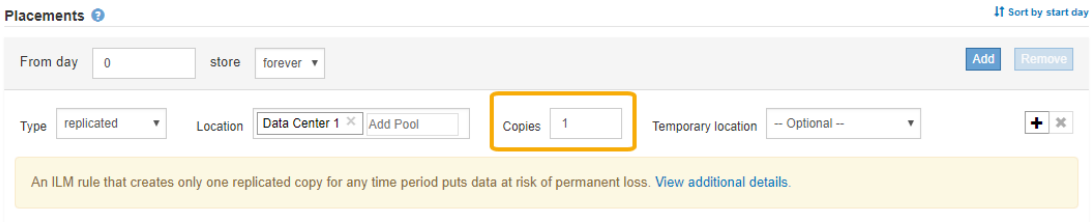
      If you specify only one storage pool, be aware that StorageGRID can store only one replicated copy of an object on any given Storage Node. If your grid includes three Storage Nodes and you select 4 as the number of copies, only three copies will be made—one copy for each Storage Node.

      > The **ILM placement unachievable** alert is triggered to indicate that the ILM rule could not be completely applied.

      If you specify more than one storage pool, keep these rules in mind:

      - The number of copies cannot be greater than the number of storage pools.
      - If the number of copies equals the number of storage pools, one copy of the object is stored in each storage pool.
      - If the number of copies is less than the number of storage pools, the system distributes the copies to keep disk usage among the pools balanced, while ensuring that no site gets more than one copy of an object.
      - If the storage pools overlap (contain the same Storage Nodes), all copies of the object might be saved at only one site. For this reason, do not specify the default All Storage Nodes storage pool and another storage pool.

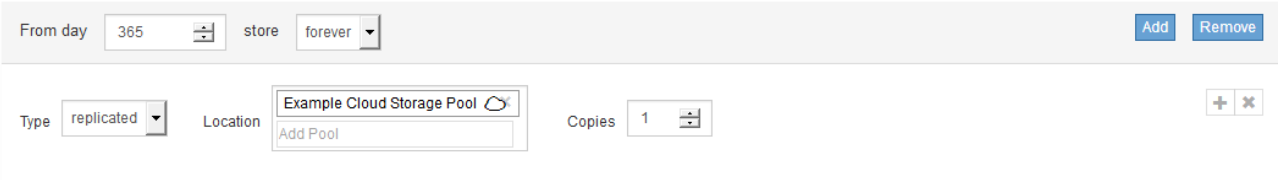
c. Select the number of copies you want to make.

> A warning appears if you change the number of copies to 1. An ILM rule that creates only one replicated copy for any time period puts data at risk of permanent loss. If only one replicated copy of an object exists during a time period, that object is lost if a Storage Node fails or has a significant error. You also temporarily lose access to the object during maintenance procedures such as upgrades.
>
> 
>
>
> To avoid these risks, do one or more of the following:
>
> - Increase the number of copies for the time period.
> - Click the plus sign icon ➕ to create additional copies during the time period. Then, select a different storage pool or a Cloud Storage Pool.
> - Select **erasure coded** for Type, instead of **replicated**. You can safely ignore this warning if this rule already creates multiple copies for all time periods.

d. If you specified only one storage pool, ignore the **Temporary location** field.

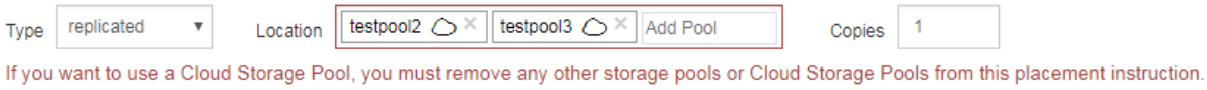
> Temporary locations are deprecated and will be removed in a future release.

4. If you want to store objects in a Cloud Storage Pool:
   a. From the **Type** drop-down list, select **replicated**.
   b. In the **Location** field, select **Add Pool**. Then, select a Cloud Storage Pool.

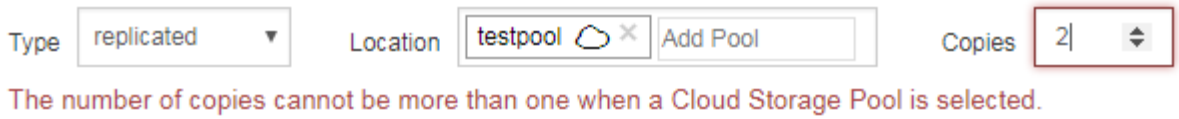


When using Cloud Storage Pools, keep these rules in mind:

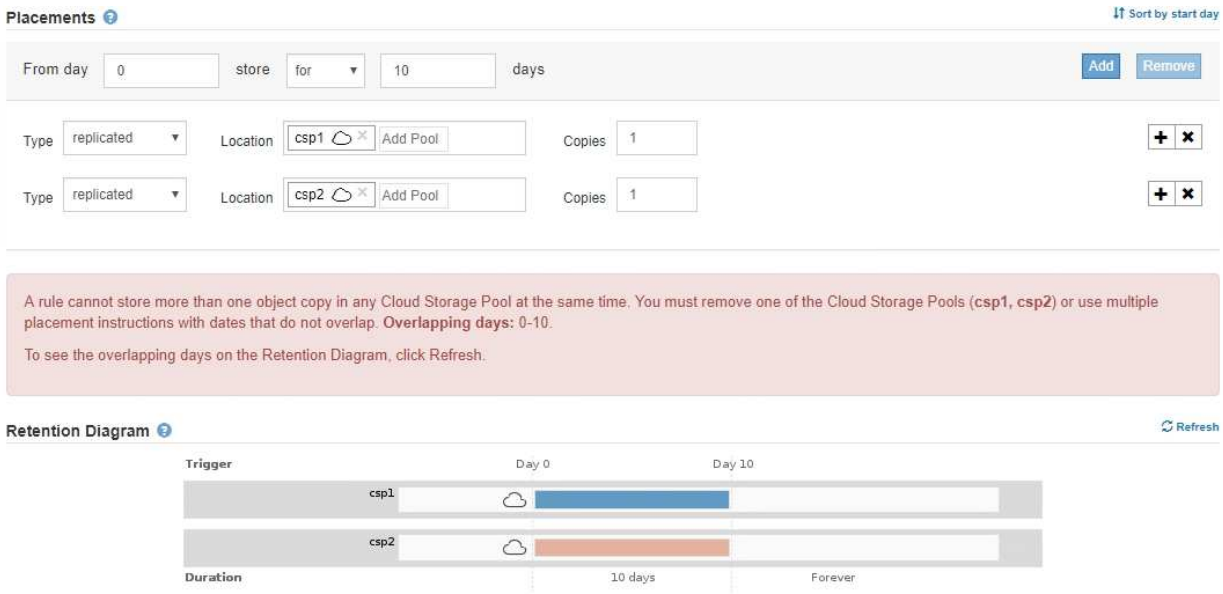
- You cannot select more than one Cloud Storage Pool in a single placement instruction. Similarly, you cannot select a Cloud Storage Pool and a storage pool in the same placement instruction.



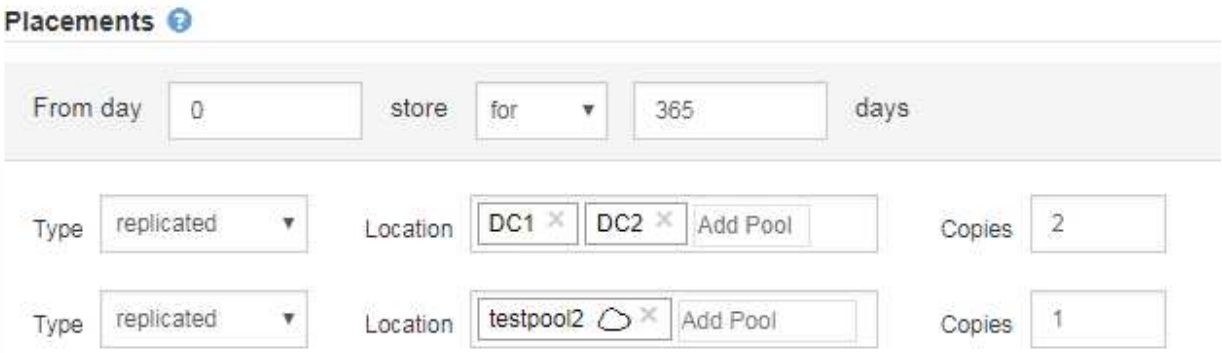
- You can store only one copy of an object in any given Cloud Storage Pool. An error message appears if you set **Copies** to 2 or more.



- You cannot store more than one object copy in any Cloud Storage Pool at the same time. An error message appears if multiple placements that use a Cloud Storage Pool have overlapping dates or if multiple lines in the same placement use a Cloud Storage Pool.



- You can store an object in a Cloud Storage Pool at the same time that object is being stored as replicated or erasure coded copies in StorageGRID. However, as this example shows, you must include more than one line in the placement instruction for the time period, so you can specify the number and types of copies for each location.



5. If you want to create an erasure-coded copy:
   a. From the **Type** drop-down list, select **erasure coded**.

      The number of copies changes to 1. A warning appears if the rule does not have an advanced filter to ignore objects that are 200 KB or smaller.

> Do not use erasure coding for objects smaller than 200 KB to avoid the overhead of managing very small erasure-coded fragments.

b. If the object size warning appeared, follow these steps to clear it:
   i. Select **Back** to return to Step 1.
   ii. Select **Advanced filtering**.
   iii. Set the Object Size (MB) filter to “greater than 0.2”.

c. Select the storage location.

   The storage location for an erasure-coded copy includes the name of the storage pool, followed by the name of the Erasure Coding profile.

6. Optionally, add different time periods or create additional copies at different locations:
   - Click the plus icon to create additional copies at a different location during the same time period.
   - Click **Add** to add a different time period to the placement instructions.

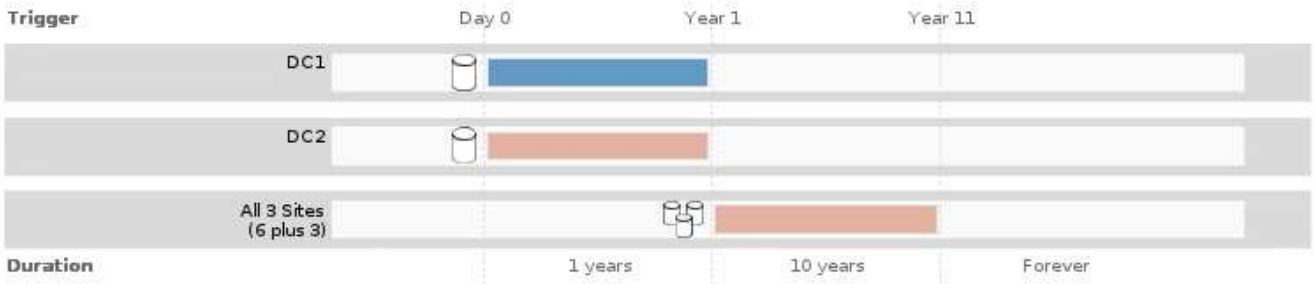
> Objects are automatically deleted at the end of the final time period unless the final time period ends with **forever**.

7. Click **Refresh** to update the Retention Diagram and to confirm your placement instructions.

   Each line in the diagram shows where and when object copies will be placed. The type of copy is represented by one of the following icons:

	Replicated copy
	Erasure-coded copy
	Cloud Storage Pool copy

In this example, two replicated copies will be saved to two storage pools (DC1 and DC2) for one year. Then, an erasure-coded copy will be saved for an additional 10 years, using a 6+3 erasure-coding scheme at three sites. After 11 years, the objects will be deleted from StorageGRID.



8. Click **Next**.

   Step 3 (Define Ingest Behavior) appears.

Related information

What ILM rule placement instructions are

Example 4: ILM rules and policy for S3 versioned objects

Why you should not use single-copy replication

Managing objects with S3 Object Lock

Using a storage pool as a temporary location (deprecated)

Step 3 of 3: Define ingest behavior

Using Last Access Time in ILM rules

You can use Last Access Time as the reference time in an ILM rule. For example, you might want to leave objects that have been viewed in the last three months on local Storage Nodes, while moving objects that have not been viewed as recently to an off-site location. You can also use Last Access Time as an advanced filter if you want an ILM rule to apply only to objects that were last accessed on a specific date.

About this task

Before using Last Access Time in an ILM rule, review the following considerations:

- When using Last Access Time as a reference time, be aware that changing the Last Access Time for an object does not trigger an immediate ILM evaluation. Instead, the object's placements are assessed and the object is moved as required when background ILM evaluates the object. This could take two weeks or more after the object is accessed.

  Take this latency into account when creating ILM rules based on Last Access Time and avoid placements that use short time periods (less than one month).

- When using Last Access Time as an advanced filter or as a reference time, you must enable last access time updates for S3 buckets. You can use the Tenant Manager or the Tenant Management API.

  > Last access time updates are always enabled for Swift containers, but are disabled by default for S3 buckets.

  > Be aware that enabling last access time updates can reduce performance, especially in systems with small objects. The performance impact occurs because StorageGRID must update the objects with new timestamps every time the objects are retrieved.

The following table summarizes whether the Last Access Time is updated for all objects in the bucket for different types of requests.

Type of request	Whether Last Access Time is updated when last access time updates are disabled	Whether Last Access Time is updated when last access time updates are enabled
Request to retrieve an object, its access control list, or its metadata	No	Yes
Request to update an object's metadata	Yes	Yes
Request to copy an object from one bucket to another	• No, for the source copy • Yes, for the destination copy	• Yes, for the source copy • Yes, for the destination copy
Request to complete a multipart upload	Yes, for the assembled object	Yes, for the assembled object

Related information

Use S3

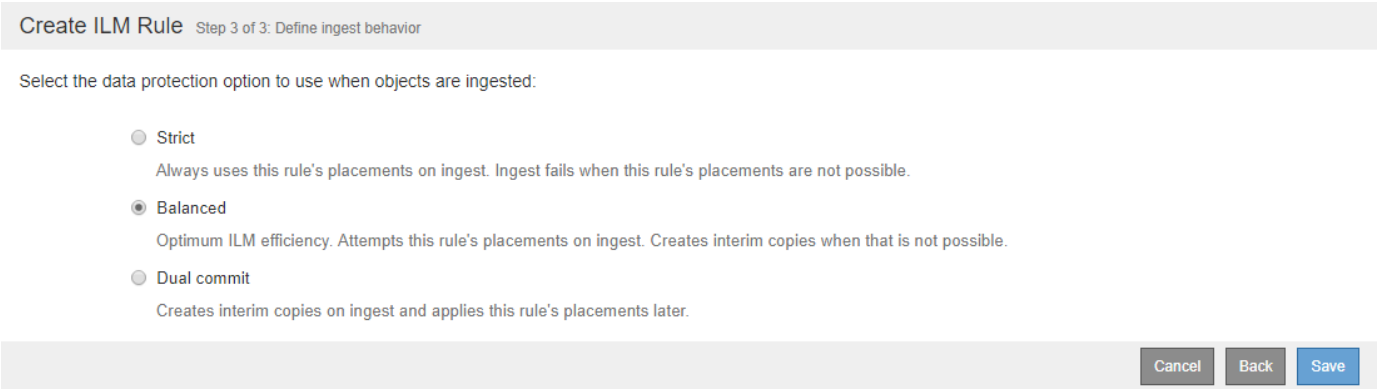
Use a tenant account

Step 3 of 3: Define ingest behavior

Step 3 (Define ingest behavior) of the Create ILM Rule wizard allows you to choose how the objects filtered by this rule are protected as they are ingested.

About this task

StorageGRID can make interim copies and queue the objects for ILM evaluation later, or it can make copies to meet the rule's placement instructions immediately.



Steps

1. Select the data protection option to use when objects are ingested:

Option	Description
Strict	Always uses this rule's placements on ingest. Ingest fails when this rule's placements are not possible.

Option	Description
Balanced	Optimum ILM efficiency. Attempts this rule's placements on ingest. Creates interim copies when that is not possible.
Dual commit	Creates interim copies on ingest and applies this rule's placements later.

Balanced offers a combination of data security and efficiency that is suitable in most cases. Strict or Dual commit are generally used to meet specific requirements.

See "What the data-protection options for ingest are" and "Advantages and disadvantages of each data-protection option" for more information.

> An error message appears if you select the Strict or Balanced option and the rule uses one of these placements:
>
> - A Cloud Storage Pool at day 0
> - An Archive Node at day 0
> - A Cloud Storage Pool or an Archive Node when the rule uses a User Defined Creation Time as a Reference Time

2. Click **Save**.

   The ILM rule is saved. The rule does not become active until it is added to an ILM policy and that policy is activated.

Related information

Data-protection options for ingest

Advantages, disadvantages, and limitations of the data-protection options

Example 5: ILM rules and policy for Strict ingest behavior

Creating an ILM policy

Creating a default ILM rule

Every ILM policy must have a default rule that does not filter objects. Before creating an ILM policy, you must create at least one ILM rule that can be used as the default rule for the policy.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

About this task

The default rule is the last rule to be evaluated in an ILM policy, so it cannot use any filters. The placement instructions for the default rule are applied to any objects that are not matched by another rule in the policy.

In this example policy, the first rule applies only to objects belonging to Tenant A. The default rule, which is last, applies to objects belonging to all other tenant accounts.

When you create the default rule, keep these requirements in mind:

- The default rule is automatically placed as the last rule in the policy.
- The default rule cannot use any basic or advanced filters.
- The default rule should create replicated copies.

> Do not use a rule that creates erasure-coded copies as the default rule for a policy. Erasure-coding rules should use an advanced filter to prevent smaller objects from being erasure coded.

- In general, the default rule should retain objects forever.
- If you are using (or you plan to enable) the global S3 Object Lock setting, the default rule for the active or proposed policy must be compliant.

Steps

1. Select **ILM** > **Rules**.

   The ILM Rules page appears.

2. Select **Create**.

   Step 1 (Define Basics) of the Create ILM Rule wizard appears.

3. Enter a unique name for the rule in the **Name** field.
4. Optionally, enter a short description for the rule in the **Description** field.
5. Leave the **Tenant Accounts** field blank.

   The default rule must apply to all tenant accounts.

6. Leave the **Bucket Name** field blank.

   The default rule must apply to all S3 buckets and Swift containers.

7. Do not select **Advanced filtering**

   The default rule cannot specify any filters.

8. Select **Next**.

   Step 2 (Define Placements) appears.

9. Specify the placement instructions for the default rule.

- The default rule should retain objects forever. A warning appears when you activate a new policy if the default rule does not retain objects forever. You must confirm this is the behavior you expect.
- The default rule should create replicated copies.

> Do not use a rule that creates erasure-coded copies as the default rule for a policy. Erasure-coding rules should include the **Object Size (MB) greater than 0.2** advanced filter to prevent smaller objects from being erasure coded.

- If you are using (or you plan to enable) the global S3 Object Lock setting, the default rule must be compliant:
  - It must create at least two replicated object copies or one erasure-coded copy.
  - These copies must exist on Storage Nodes for the entire duration of each line in the placement instructions.
  - Object copies cannot be saved in a Cloud Storage Pool.
  - Object copies cannot be saved on Archive Nodes.
  - At least one line of the placement instructions must start at day 0, using Ingest Time as the reference time.
  - At least one line of the placement instructions must be “forever.”

10. Click **Refresh** to update the Retention Diagram and to confirm your placement instructions.
11. Click **Next**.

    Step 3 (Define Ingest Behavior) appears.

12. Select the data protection option to use when objects are ingested, and select **Save**.

Creating an ILM policy

When you create an ILM policy, you start by selecting and arranging the ILM rules. Then, you verify the behavior of your proposed policy by simulating it against previously ingested objects. When you are satisfied that the proposed policy is functioning as intended, you can activate it to create the active policy.

> An ILM policy that has been incorrectly configured can result in unrecoverable data loss. Before activating an ILM policy, carefully review the ILM policy and its ILM rules, and then simulate the ILM policy. Always confirm that the ILM policy will work as intended.

Considerations for creating an ILM policy

- Use the system’s built-in policy, Baseline 2 Copies Policy, in test systems only. The Make 2 Copies rule in this policy uses the All Storage Nodes storage pool, which contains all sites. If your StorageGRID system has more than one site, two copies of an object might be placed on the same site.
- When designing a new policy, consider all of the different types of objects that might be ingested into your grid. Make sure the policy includes rules to match and place these objects as required.
- Keep the ILM policy as simple as possible. This avoids potentially dangerous situations where object data is not protected as intended when changes are made to the StorageGRID system over time.
- Make sure that the rules in the policy are in the correct order. When the policy is activated, new and

existing objects are evaluated by the rules in the order listed, starting at the top. For example, if the first rule in a policy matches an object, that rule will not be evaluated by any other rule.

- The last rule in every ILM policy is the default ILM rule, which cannot use any filters. If an object has not been matched by another rule, the default rule controls where that object is placed and for how long it is retained.
- Before activating a new policy, review any changes that the policy is making to the placement of existing objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

Related information

What an ILM policy is

Example 6: Changing an ILM policy

Creating a proposed ILM policy

You can create a proposed ILM policy from scratch, or you can clone the current active policy if you want to start with the same set of rules.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have created the ILM rules you want to add to the proposed policy. As required, you can save a proposed policy, create additional rules, and then edit the proposed policy to add the new rules.
- You must have created a default ILM rule for the policy that does not contain any filters.

  Creating a default ILM rule

About this task

Typical reasons for creating a proposed ILM policy include:

- You added a new site and need to use new ILM rules to place objects at that site.
- You are decommissioning a site and you need to remove all rules that refer to the site.
- You added a new tenant that has special data protection requirements.
- You started to use a Cloud Storage Pool.

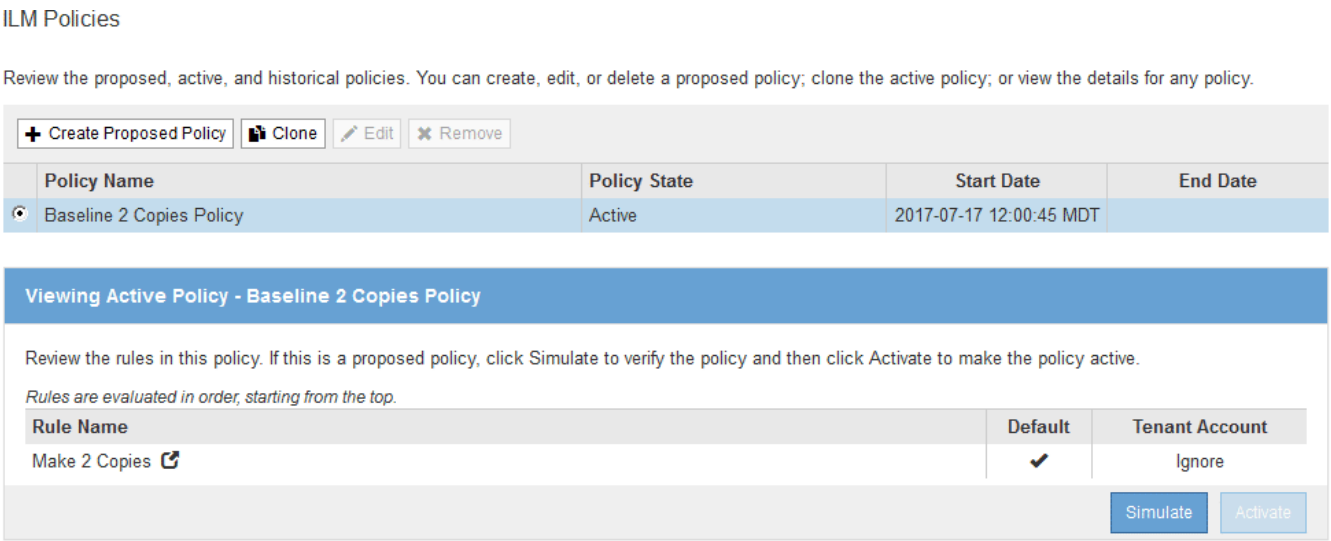
> Use the system's built-in policy, Baseline 2 Copies Policy, in test systems only. The Make 2 Copies rule in this policy uses the All Storage Nodes storage pool, which contains all sites. If your StorageGRID system has more than one site, two copies of an object might be placed on the same site.

> If the global S3 Object Lock setting has been enabled, the steps for creating a policy are slightly different. You must ensure that the ILM policy is compliant with the requirements of buckets that have S3 Object Lock enabled.
>
> Creating an ILM policy after S3 Object Lock is enabled

Steps

1. Select **ILM** > **Policies**.

   The ILM Policies page appears. From this page, you can review the list of proposed, active, and historical policies; create, edit, or remove a proposed policy; clone the active policy; or view the details for any policy.

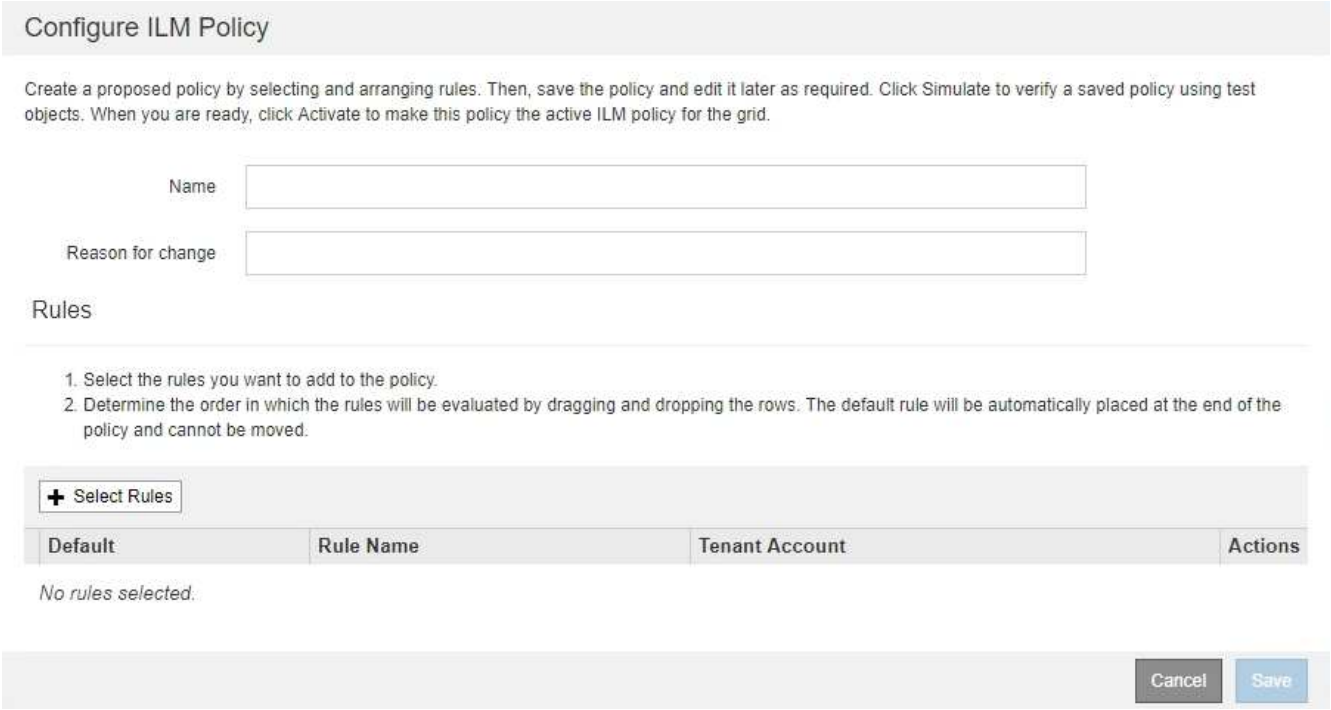


2. Determine how you want to create the proposed ILM policy.

Option	Steps
Create a new proposed policy that has no rules already selected	a. If a proposed ILM policy currently exists, select that policy, and click **Remove**. You cannot create a new proposed policy if a proposed policy already exists. b. Click **Create Proposed Policy**.
Create a proposed policy based on the active policy	a. If a proposed ILM policy currently exists, select that policy, and click **Remove**. You cannot clone the active policy if a proposed policy already exists. b. Select the active policy from the table. c. Click **Clone**.
Edit the existing proposed policy	a. Select the proposed policy from the table. b. Click **Edit**.

   The Configure ILM Policy dialog box appears.

   If you are creating a new proposed policy, all fields are blank and no rules are selected.



If you are cloning the active policy, the **Name** field shows the name of the active policy, appended by a version number ("v2" in the example). The rules used in the active policy are selected and shown in their current order.

3. Enter a unique name for the proposed policy in the **Name** field.

   You must enter at least 1 and no more than 64 characters. If you are cloning the active policy, you can use the current name with the appended version number or you can enter a new name.

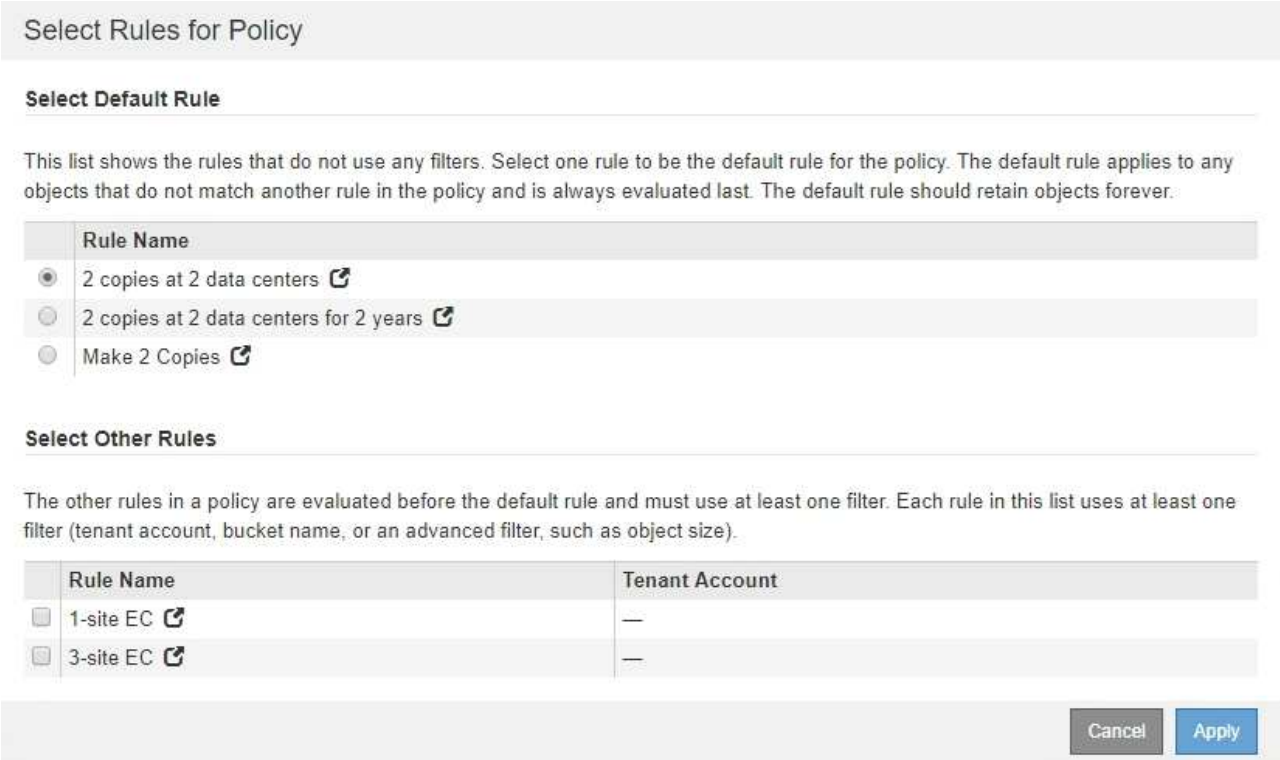
4. Enter the reason you are creating a new proposed policy in the **Reason for change** field.

   You must enter at least 1 and no more than 128 characters.

5. To add rules to the policy, select **Select Rules**.

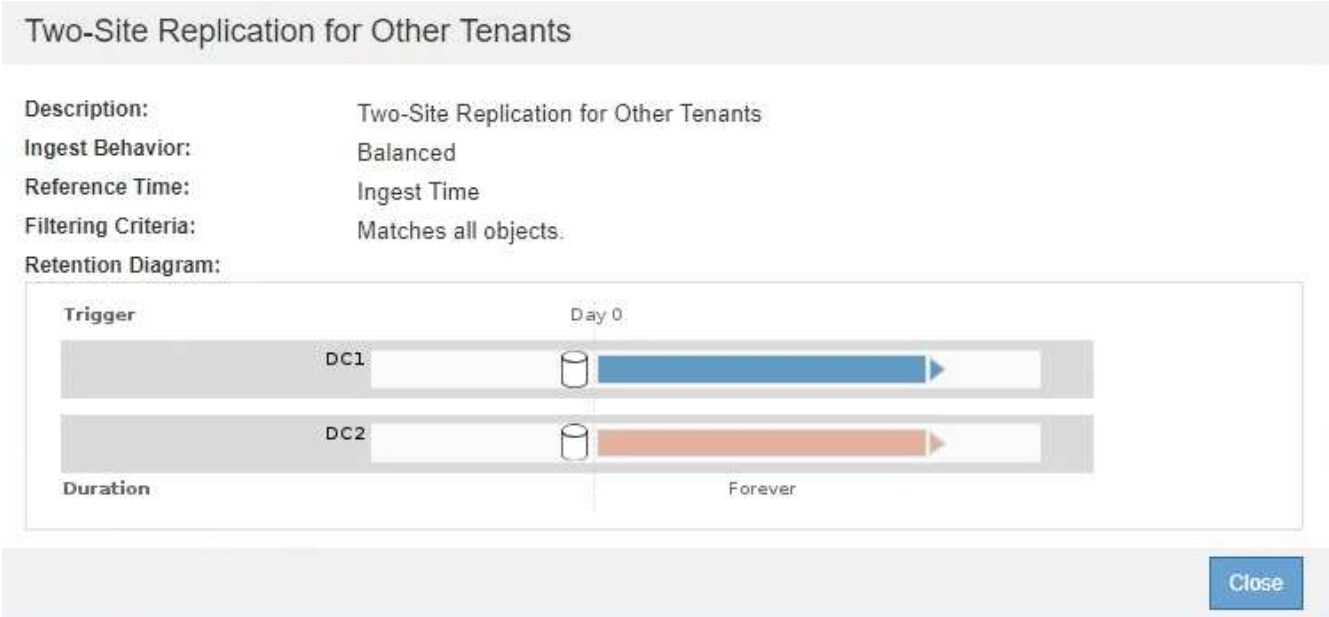
   The Select Rules for Policy dialog box appears, with all defined rules listed. If you are cloning a policy:

   - The rules used by the policy you are cloning are selected.
   - If the policy you are cloning used any rules with no filters that were not the default rule, you are prompted to remove all but one of those rules.
   - If the default rule used a filter, you are prompted to select a new default rule.
   - If the default rule was not the last rule, a button allows you to move the rule to the end of the new policy.



6. Select a rule name or the more details icon to view the settings for that rule.

   This example shows the details of an ILM rule that makes two replicated copies at two sites.



7. In the **Select Default Rule** section, select one default rule for the proposed policy.

   The default rule applies to any objects that do not match another rule in the policy. The default rule cannot use any filter and is always evaluated last.

   > If no rule is listed in the Select Default Rule section, you must exit the ILM policy page and create a default rule.
   >
   > Creating a default ILM rule

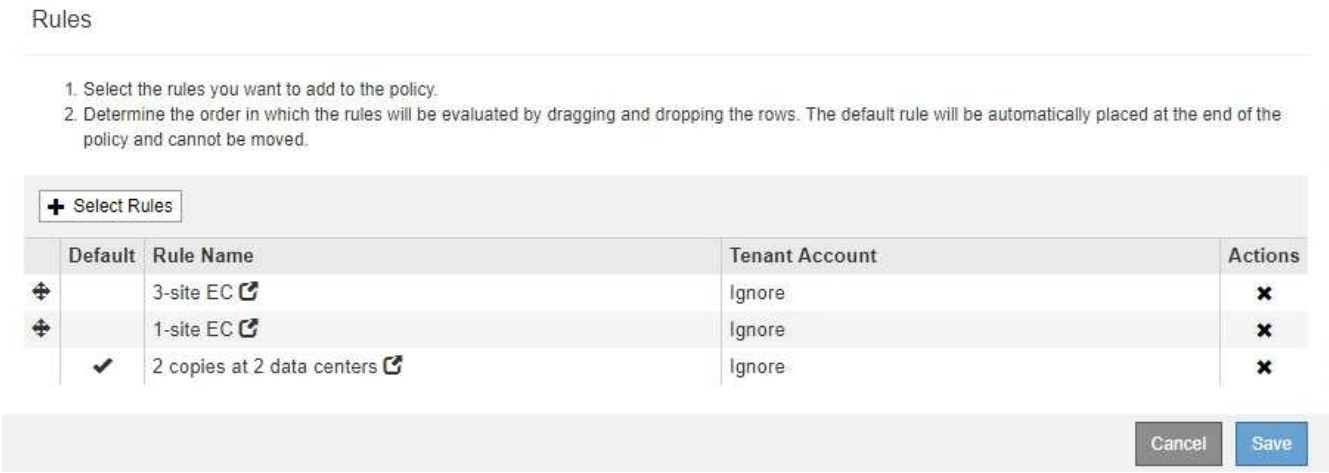
> Do not use the Make 2 Copies stock rule as the default rule for a policy. The Make 2 Copies rule uses a single storage pool, All Storage Nodes, which contains all sites. If your StorageGRID system has more than one site, two copies of an object might be placed on the same site.

8. In the **Select Other Rules** section, select any other rules you want to include in the policy.

   The other rules are evaluated before the default rule and must use at least one filter (tenant account, bucket name, or an advanced filter, such as object size).

9. When you are done selecting rules, select **Apply**.

   The rules you selected are listed. The default rule is at the end, with the other rules above it.



> A warning appears if the default rule does not retain objects forever. When you activate this policy, you must confirm that you want StorageGRID to delete objects when the placement instructions for the default rule elapse (unless a bucket lifecycle keeps the objects for longer).

10. Drag and drop the rows for the non-default rules to determine the order in which these rules will be evaluated.

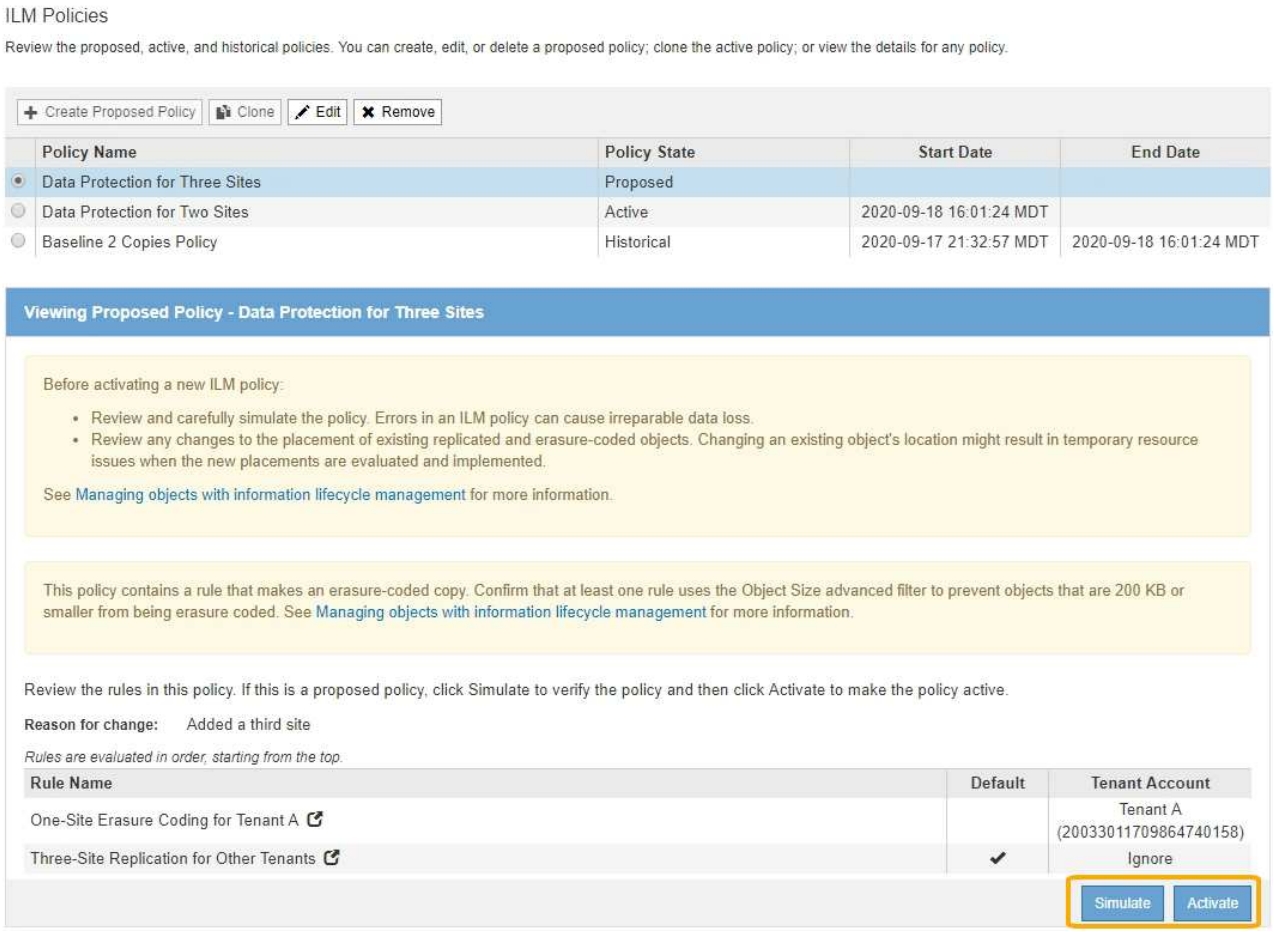
    You cannot move the default rule.

> You must confirm that the ILM rules are in the correct order. When the policy is activated, new and existing objects are evaluated by the rules in the order listed, starting at the top.

11. As required, click the delete icon ✖ to delete any rules that you do not want in the policy, or select **Select Rules** to add more rules.
12. When you are done, select **Save**.

The ILM Policies page is updated:

- The policy you saved is shown as Proposed. Proposed policies do not have start and end dates.
- The **Simulate** and **Activate** buttons are enabled.



13. Go to Simulating an ILM policy.

Related information

What an ILM policy is

Managing objects with S3 Object Lock

Creating an ILM policy after S3 Object Lock is enabled

If the global S3 Object Lock setting is enabled, the steps for creating a policy are slightly different. You must ensure that the ILM policy is compliant with the requirements of buckets that have S3 Object Lock enabled.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- The global S3 Object Lock setting must already be enabled for the StorageGRID system.

> If the global S3 Object Lock setting has not been enabled, use the general instructions for creating a proposed policy instead.
>
> Creating a proposed ILM policy

- You must have created the compliant and non-compliant ILM rules you want to add to the proposed policy. As required, you can save a proposed policy, create additional rules, and then edit the proposed policy to add the new rules.

  Example 7: Compliant ILM policy for S3 Object Lock

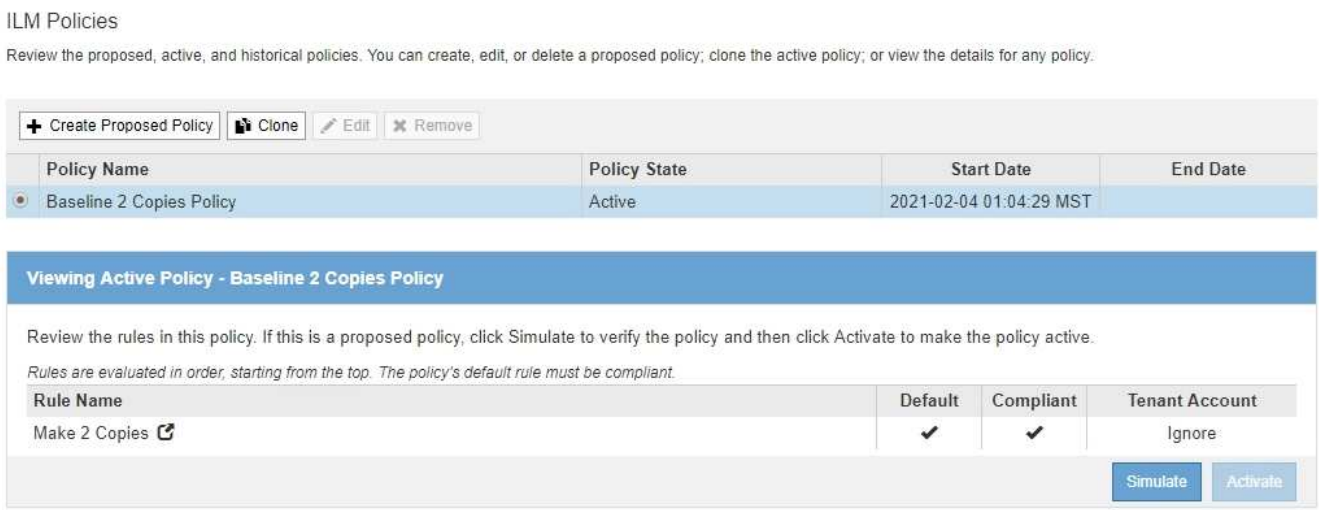
- You must have created a compliant default ILM rule for the policy.

  Creating a default ILM rule

Steps

1. Select **ILM** > **Policies**.

   The ILM Policies page appears. If the global S3 Object Lock setting is enabled, the ILM Policies page indicates which ILM rules are compliant.



2. Enter a unique name for the proposed policy in the **Name** field.

   You must enter at least 1 and no more than 64 characters.

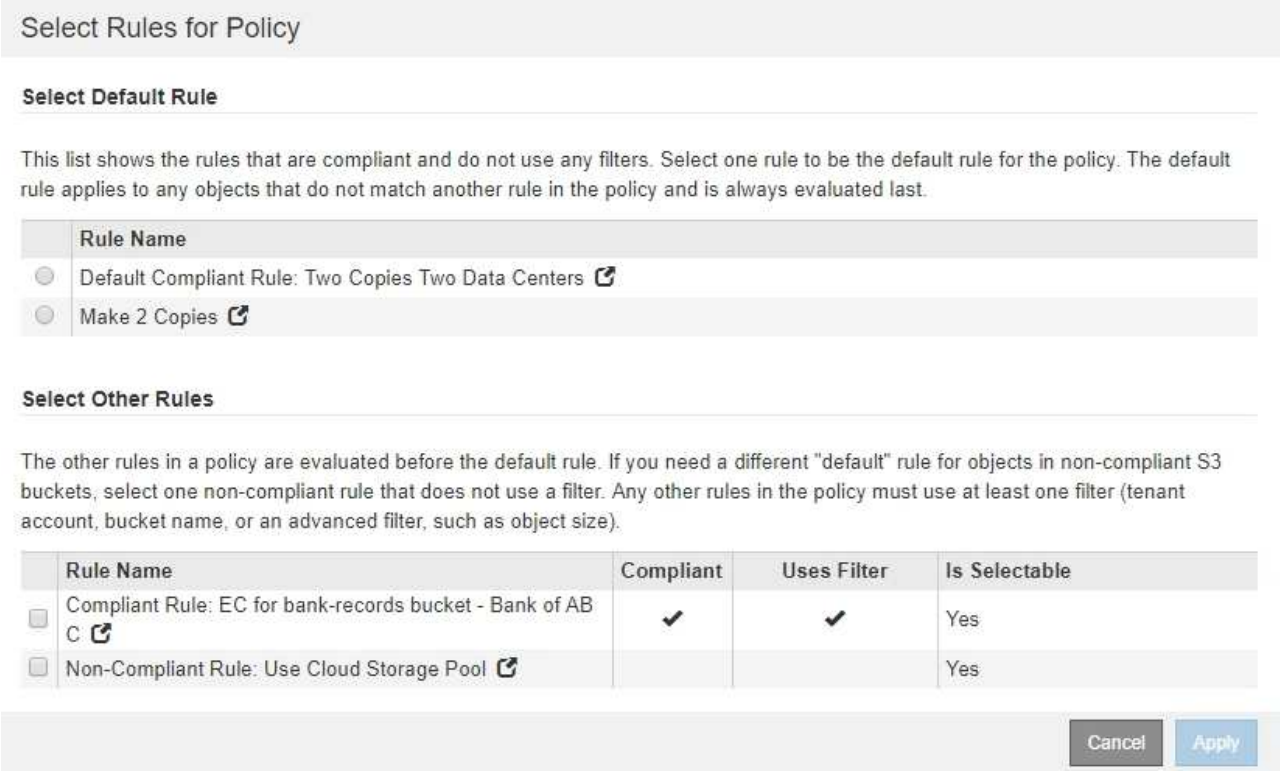
3. Enter the reason you are creating a new proposed policy in the **Reason for change** field.

   You must enter at least 1 and no more than 128 characters.

4. To add rules to the policy, select **Select Rules**.

   The Select Rules for Policy dialog box appears, with all defined rules listed.

   - The Select Default Rule section lists the rules that can be the default for a compliant policy. It includes compliant rules that do not use filters.
   - The Select Other Rules section lists the other compliant and non-compliant rules that can be selected for this policy.



5. Select a rule name or the more details icon to view the settings for that rule.
6. In the **Select Default Rule** section, select one default rule for the proposed policy.

   The table in this section only lists the rules that are compliant and do not use any filters.

   > If no rule is listed in the Select Default Rule section, you must exit the ILM policy page and create a default rule that is compliant.
   >
   > Creating a default ILM rule

   > Do not use the Make 2 Copies stock rule as the default rule for a policy. The Make 2 Copies rule uses a single storage pool, All Storage Nodes, which contains all sites. If you use this rule, multiple copies of an object might be placed on the same site.

7. In the **Select Other Rules** section, select any other rules you want to include in the policy.
   a. If you need a different “default” rule for objects in non-compliant S3 buckets, optionally select one non-compliant rule that does not use a filter.

      For example, you might want to use a Cloud Storage Pool or an Archive Node to store objects in buckets that do not have S3 Object Lock enabled.

      > You can only select one non-compliant rule that does not use a filter. As soon as you select one rule, the **Is Selectable** column shows **No** for any other non-compliant rules without filters.

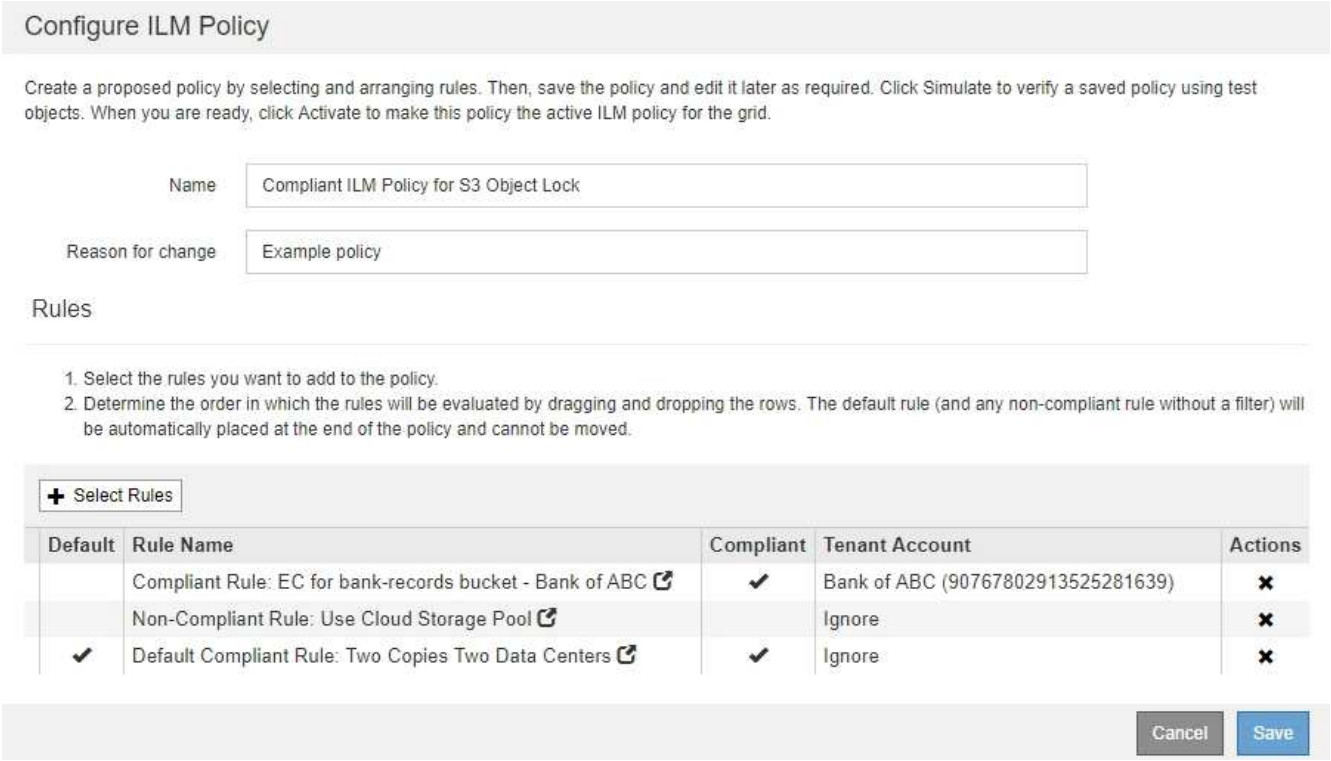
   b. Select any other compliant or non-compliant rules you want to use in the policy.

      The other rules must use at least one filter (tenant account, bucket name, or an advanced filter, such as object size).

8. When you are done selecting the rules, select **Apply**.

   The rules you selected are listed. The default rule is at the end, with the other rules above it. If you also selected a non-compliant “default” rule, that rule is added as the second-to-last rule in the policy.

   In this example, the last rule, 2 Copies 2 Data Centers, is the default rule: it is compliant and has no filters. The second-to-last rule, Cloud Storage Pool, also has no filters but it is not compliant.



   .

9. Drag and drop the rows for the non-default rules to determine the order in which these rules will be evaluated.

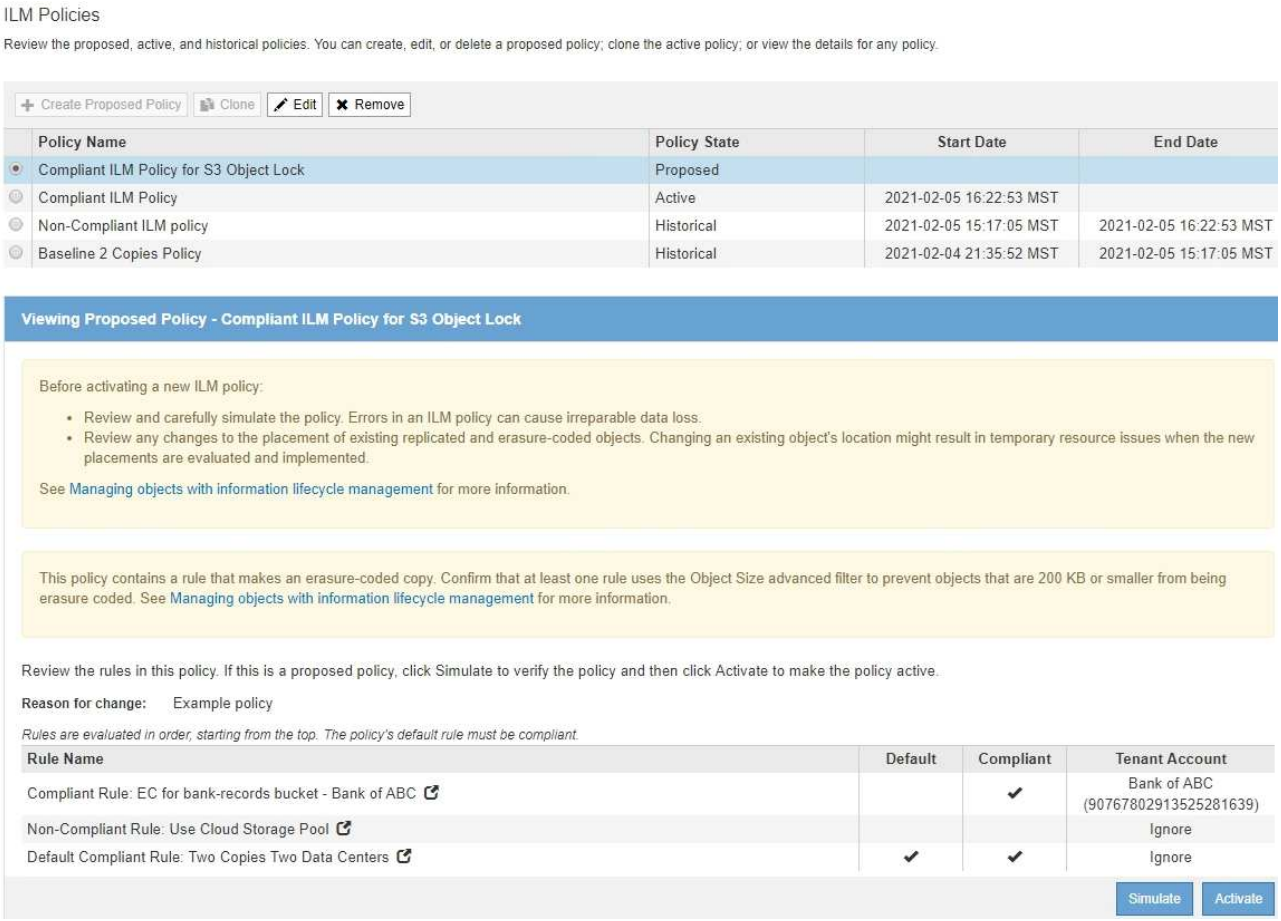
   You cannot move the default rule or the non-compliant “default” rule.

   > You must confirm that the ILM rules are in the correct order. When the policy is activated, new and existing objects are evaluated by the rules in the order listed, starting at the top.

10. As required, click the delete icon ✖ to delete any rules that you do not want in the policy, or select **Select Rules** to add more rules.
11. When you are done, select **Save**.

    The ILM Policies page is updated:

    - The policy you saved is shown as Proposed. Proposed policies do not have start and end dates.
    - The **Simulate** and **Activate** buttons are enabled.



12. Go to Simulating an ILM policy.

Simulating an ILM policy

You should simulate a proposed policy on test objects before activating the policy and applying it to your production data. The simulation window provides a standalone environment that is safe for testing policies before they are activated and applied to data in the production environment.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must know the S3 bucket/object-key or the Swift container/object-name for each object you want to test, and you must have already ingested those objects.

About this task

You must carefully select the objects you want the proposed policy to test. To simulate a policy thoroughly, you should test at least one object for each filter in each rule.

For example, if a policy includes one rule to match objects in bucket A and another rule to match objects in bucket B, you must select at least one object from bucket A and one object from bucket B to test the policy thoroughly. If the policy includes a default rule to place all other objects, you must test at least one object from another bucket.

When simulating a policy, the following considerations apply:

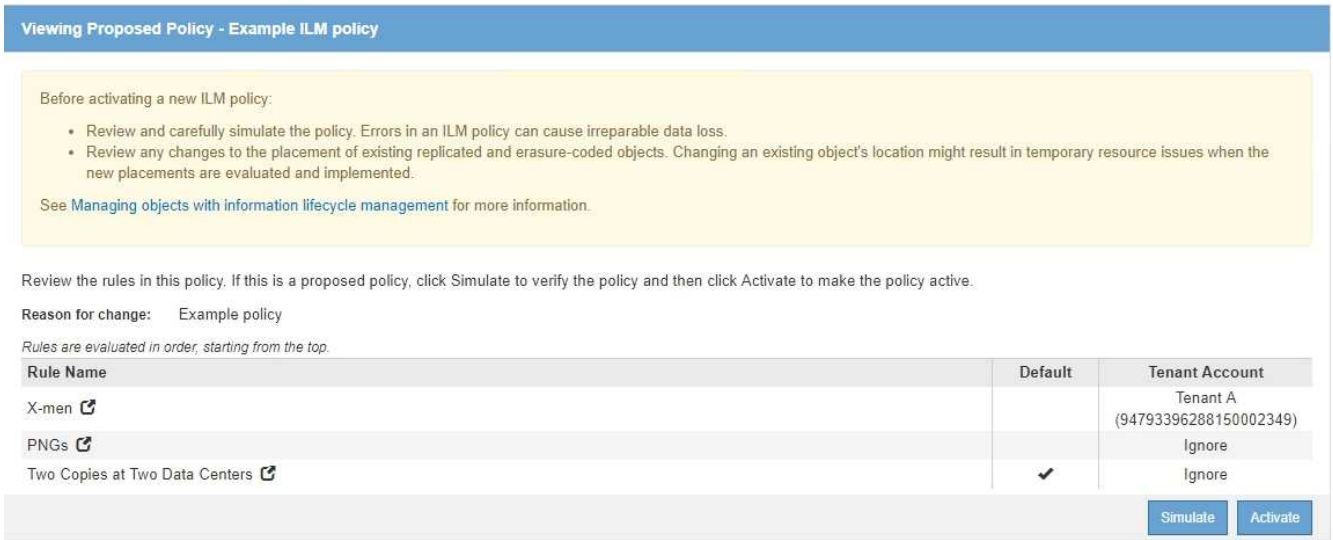
- After you make changes to a policy, save the proposed policy. Then, simulate the behavior of the saved proposed policy.
- When you simulate a policy, the ILM rules in the policy filter the test objects, so you can see which rule was applied to each object. However, no object copies are made and no objects are placed. Running a simulation does not modify your data, rules, or the policy in any way.
- The Simulation page retains the objects you tested until you close, navigate away from, or refresh the ILM Policies page.
- Simulation returns the name of the matched rule. To determine which storage pool or Erasure Coding profile is in effect, you can view the Retention Diagram by clicking the rule name or the more details icon .
- If S3 Versioning is enabled, the policy is only simulated against the current version of the object.

Steps

1. Select and arrange the rules, and save the proposed policy.

   The policy in this example has three rules:

Rule Name	Filter	Type of Copies	Retention
X-men	• Tenant A • User metadata (series=x-men)	2 copies at two data centers	2 years
PNGs	Key ends with .png	2 copies at two data centers	5 years
Two Copies Two Data Centers	*None*	2 copies at two data centers	Forever



2. Click **Simulate**.

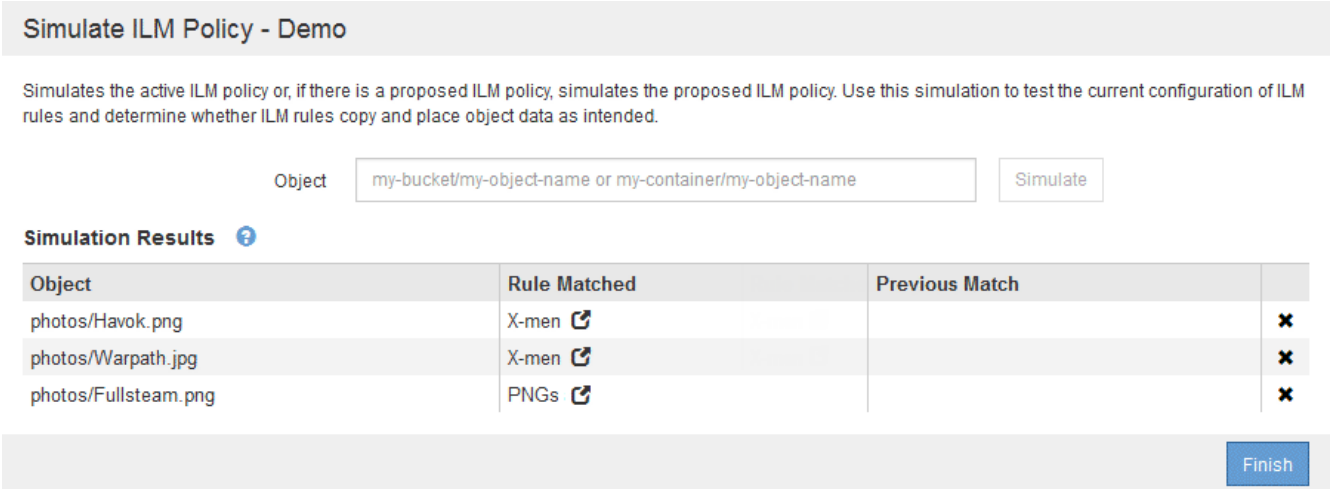
   The Simulation ILM Policy dialog box appears.

3. In the **Object** field, enter the S3 bucket/object-key or the Swift container/object-name for a test object, and click **Simulate**.

A message appears if you specify an object that has not been ingested.

4. Under **Simulation Results**, confirm that each object was matched by the correct rule.

   In the example, the `Havok.png` and `Warpath.jpg` objects were correctly matched by the X-men rule. The `Fullsteam.png` object, which does not include `series=x-men` user metadata, was not matched by the X-men rule but was correctly matched by the PNGs rule. The default rule was not used because all three objects were matched by other rules.



Examples for simulating ILM policies

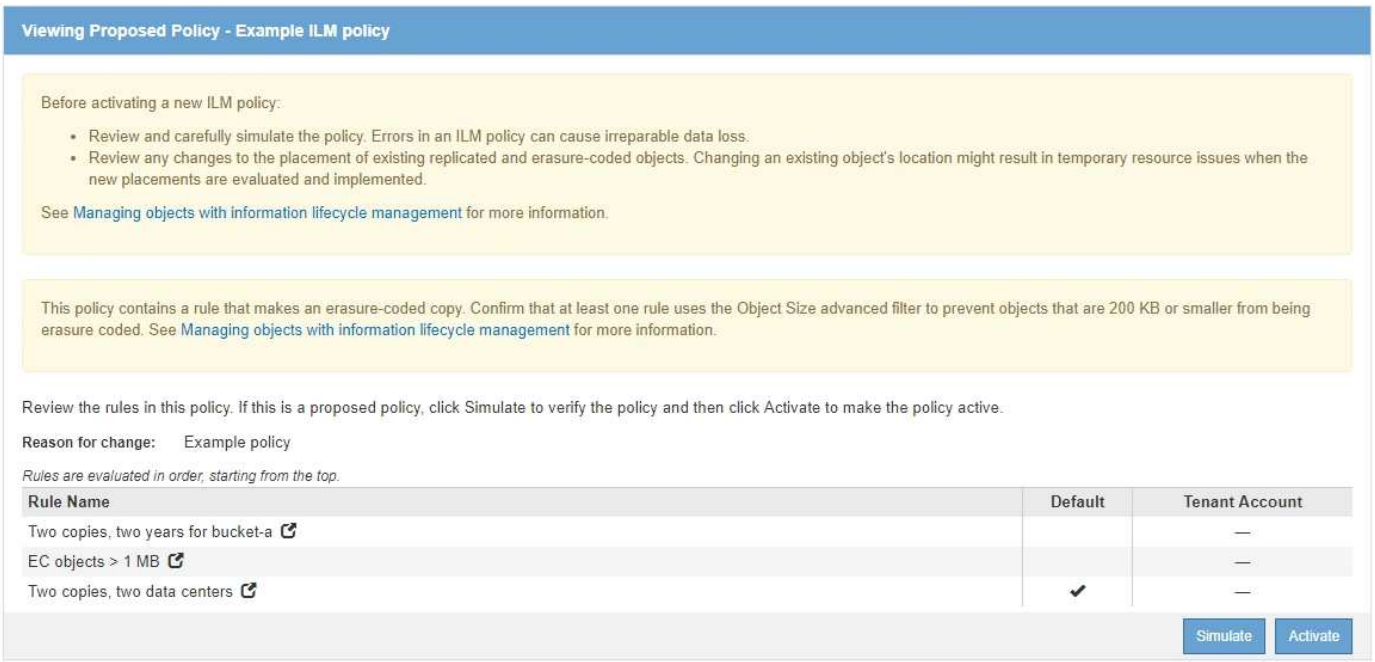
These examples show how you can verify ILM rules by simulating the ILM policy before activating it.

Example 1: Verifying rules when simulating a proposed ILM policy

This example shows how to verify rules when simulating a proposed policy.

In this example, the **Example ILM policy** is being simulated against the ingested objects in two buckets. The policy includes three rules, as follows:

- The first rule, **Two copies, two years for bucket-a**, applies only to objects in bucket-a.
- The second rule, **EC objects › 1 MB**, applies to all buckets but filters on objects greater than 1 MB.
- The third rule is the default rule and does not include any filters.



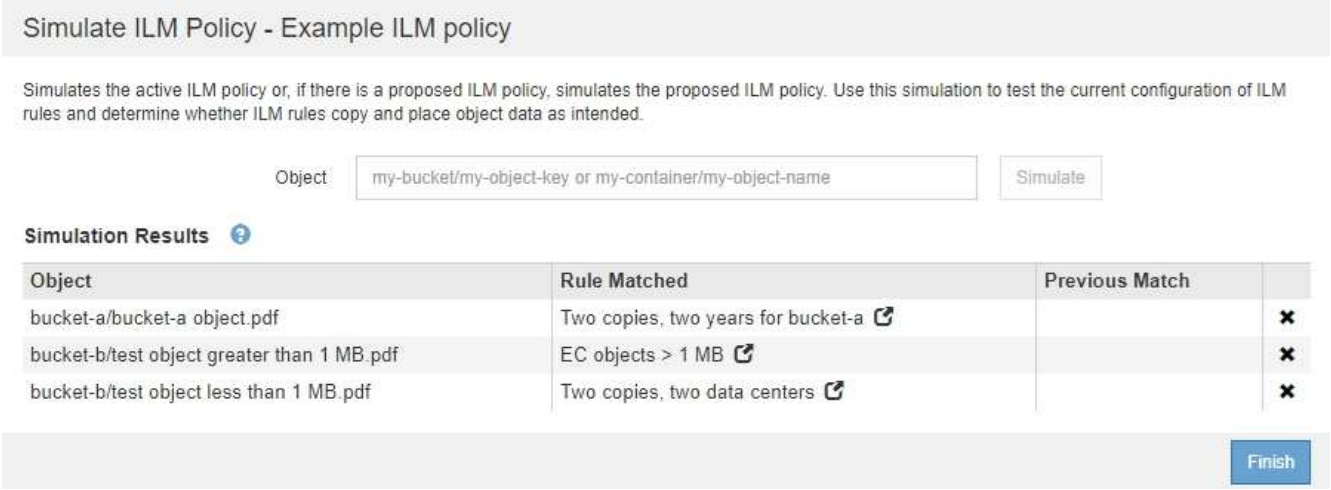
Steps

1. After adding the rules and saving the policy, click **Simulate**.

   The Simulate ILM Policy dialog box appears.

2. In the **Object** field, enter the S3 bucket/object-key or the Swift container/object-name for a test object, and click **Simulate**.

   The Simulation Results appear, showing which rule in the policy matched each object you tested.



3. Confirm that each object was matched by the correct rule.

   In this example:

   a. `bucket-a/bucket-a object.pdf` correctly matched the first rule, which filters on objects in `bucket-a`.

   b. `bucket-b/test object greater than 1 MB.pdf` is in `bucket-b`, so it did not match the first rule. Instead, it was correctly matched by the second rule, which filters on objects greater than 1 MB.

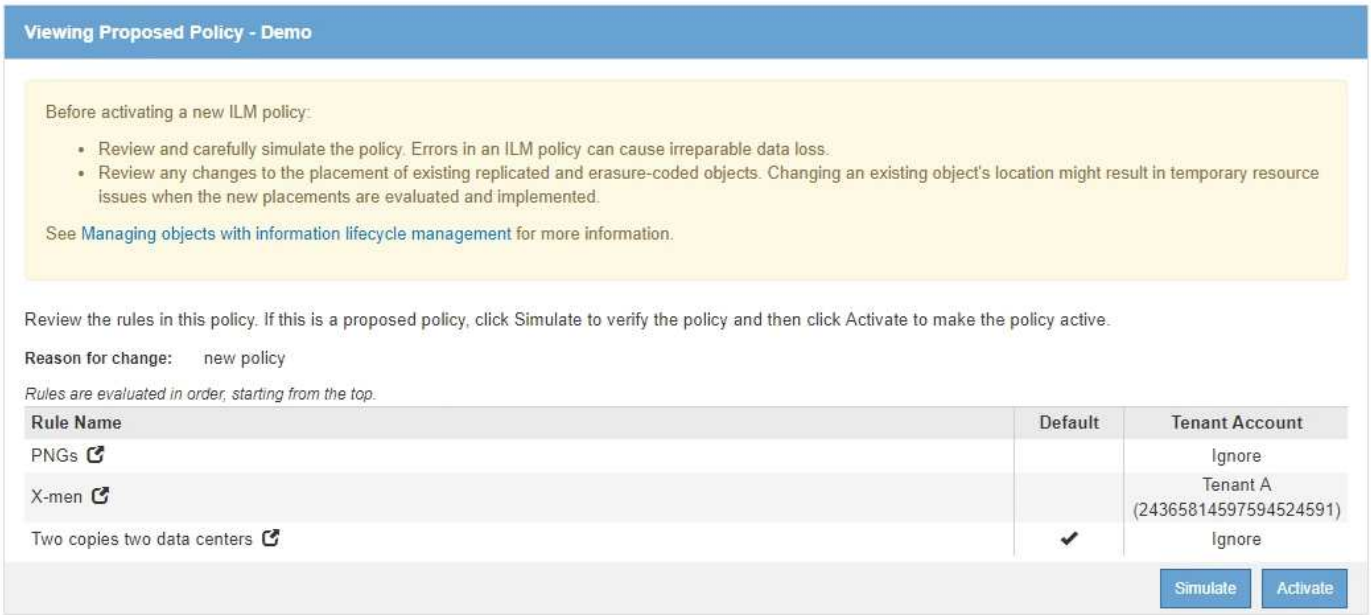
c. `bucket-b/test object less than 1 MB.pdf` did not match the filters in the first two rules, so it will be placed by the default rule, which includes no filters.

Example 2: Reordering rules when simulating a proposed ILM policy

This example shows how you can reorder rules to change the results when simulating a policy.

In this example, the **Demo** policy is being simulated. This policy, which is intended to find objects that have series=x-men user metadata, includes three rules, as follows:

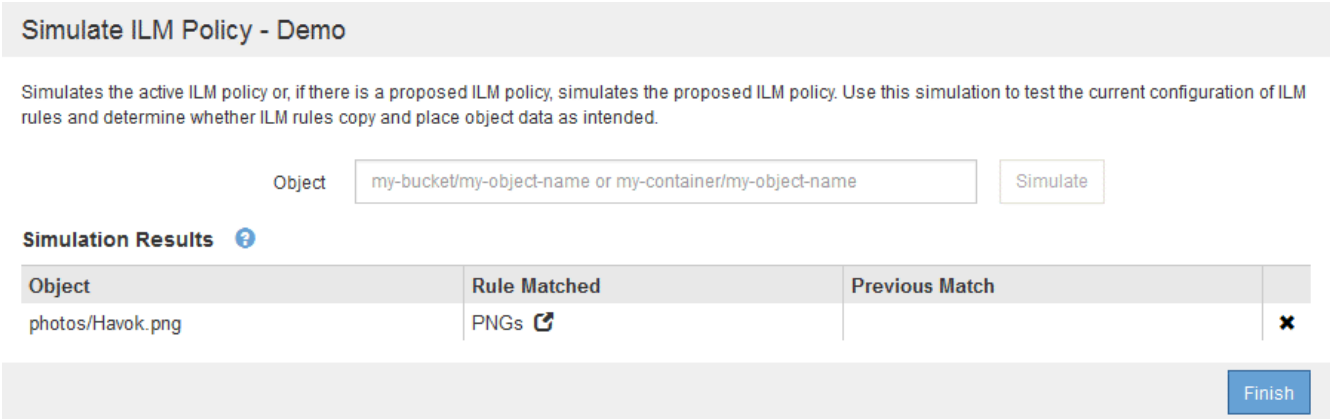
- The first rule, **PNGs**, filters for key names that end in `.png`.
- The second rule, **X-men**, applies only to objects for Tenant A and filters for `series=x-men` user metadata.
- The last rule, **Two copies two data centers**, is the default rule, which matches any objects that do not match the first two rules.



Steps

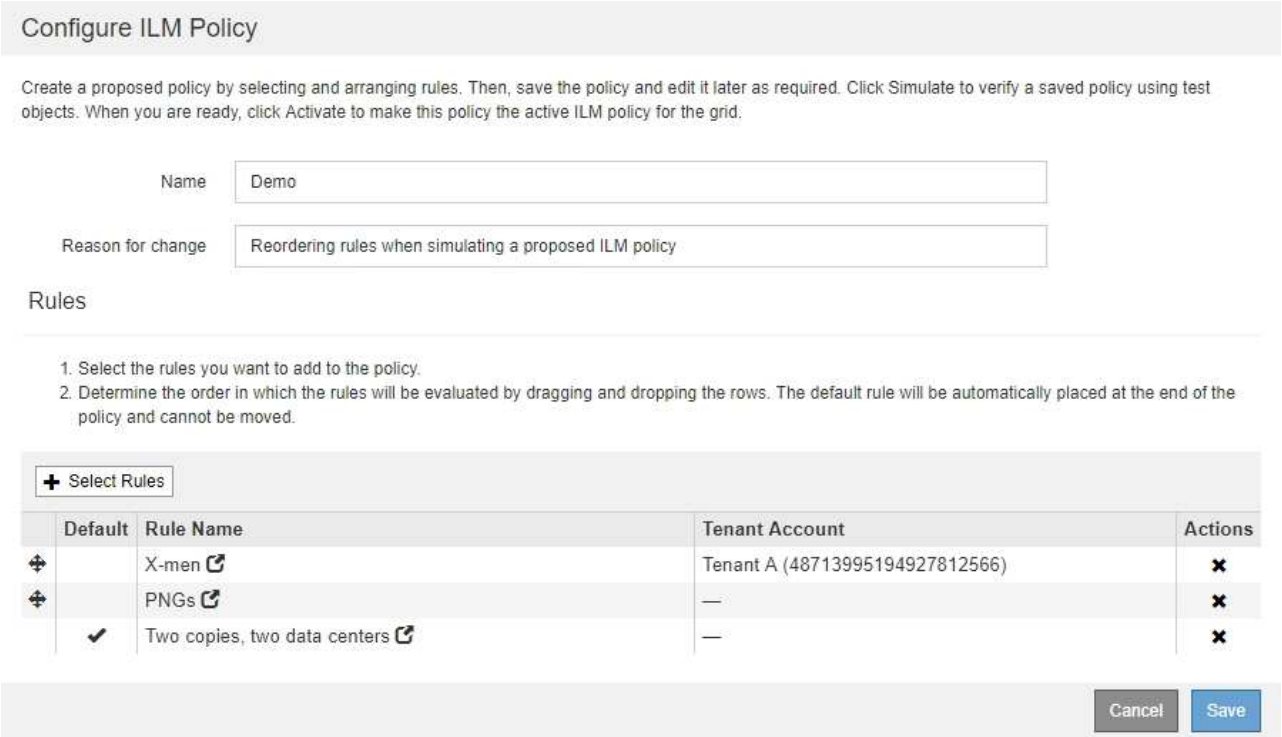
1. After adding the rules and saving the policy, click **Simulate**.
2. In the **Object** field, enter the S3 bucket/object-key or the Swift container/object-name for a test object, and click **Simulate**.

   The Simulation Results appear, showing that the `Havok.png` object was matched by the **PNGs** rule.



However, the rule that the `Havok.png` object was meant to test was the **X-men** rule.

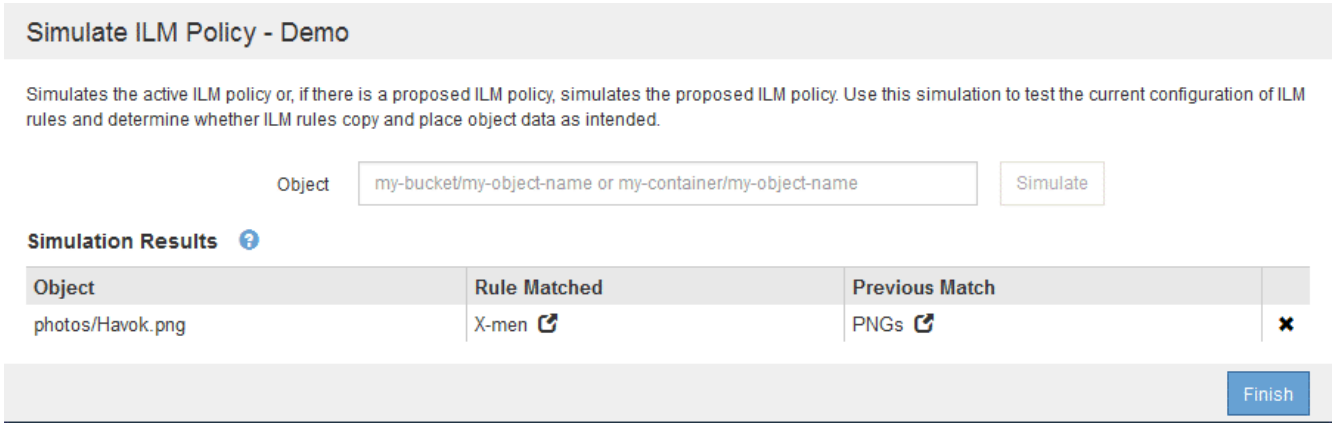
3. To resolve the issue, reorder the rules.
   a. Click **Finish** to close the Simulate ILM Policy page.
   b. Click **Edit** to edit the policy.
   c. Drag the **X-men** rule to the top of the list.



   d. Click **Save**.

4. Click **Simulate**.

   The objects you previously tested are re-evaluated against the updated policy, and the new simulation results are shown. In the example, the Rule Matched column shows that the `Havok.png` object now matches the X-men metadata rule, as expected. The Previous Match column shows that the PNGs rule matched the object in the previous simulation.

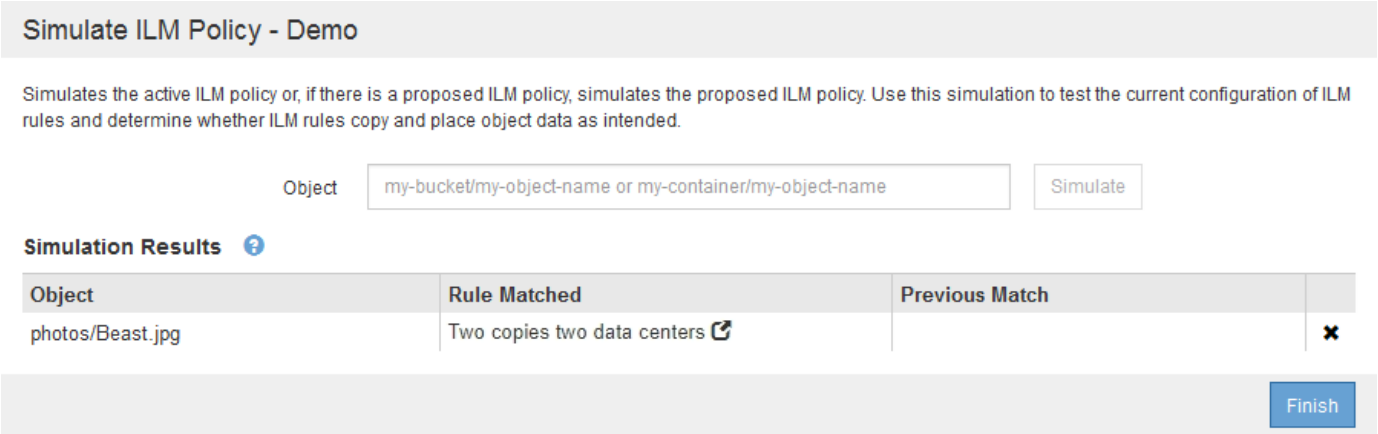


> If you stay on the Configure Policies page, you can re-simulate a policy after making changes without needing to re-enter the names of the test objects.

Example 3: Correcting a rule when simulating a proposed ILM policy

This example shows how to simulate a policy, correct a rule in the policy, and continue the simulation.

In this example, the **Demo** policy is being simulated. This policy is intended to find objects that have `series=x-men` user metadata. However, unexpected results occurred when simulating this policy against the `Beast.jpg` object. Instead of matching the X-men metadata rule, the object matched the default rule, Two copies two data centers.

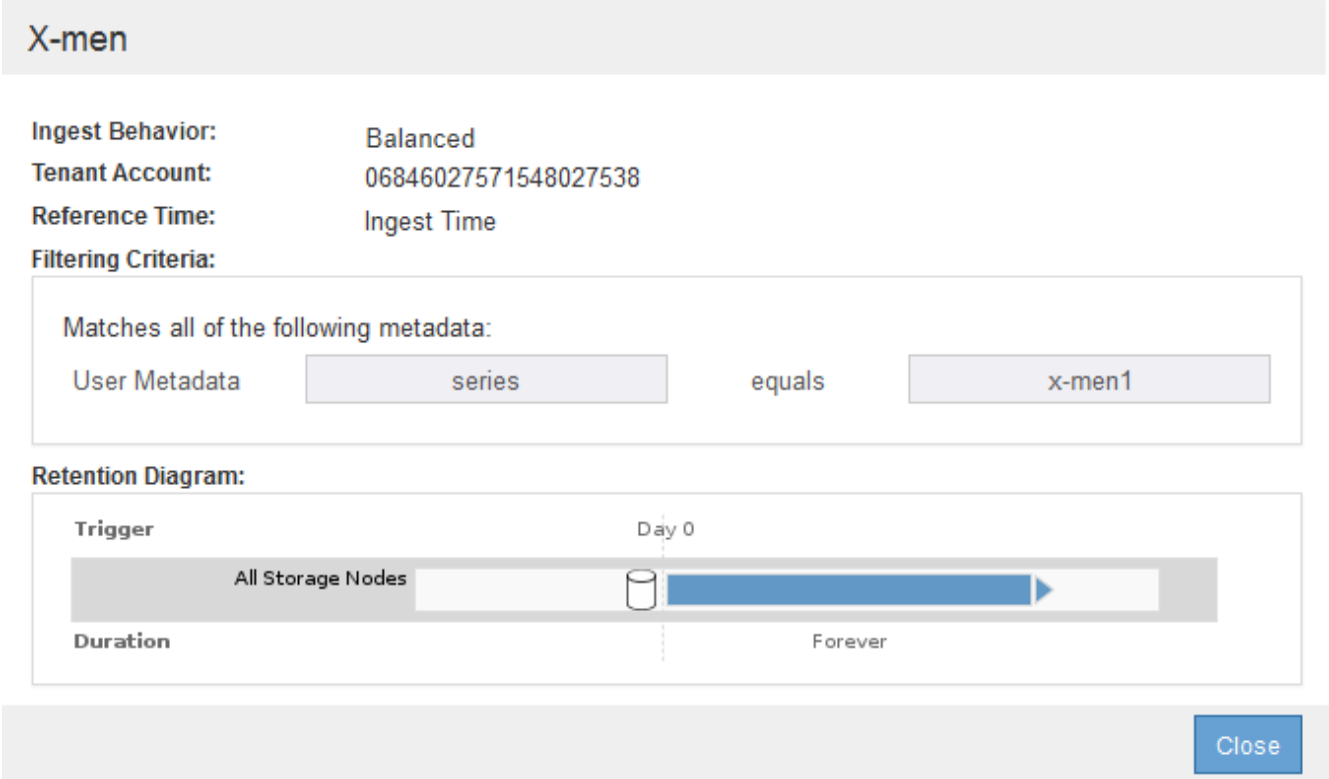


When a test object is not matched by the expected rule in the policy, you must examine each rule in the policy and correct any errors.

Steps

1. For each rule in the policy, view the rule settings by clicking the rule name or the more details icon on any dialog box where the rule is displayed.
2. Review the rule's tenant account, reference time, and filtering criteria.

   In this example, the metadata for the X-men rule includes an error. The metadata value was entered as "x-men1" instead of "x-men."



3. To resolve the error, correct the rule, as follows:
   - If the rule is part of the proposed policy, you can either clone the rule or remove the rule from the policy and then edit it.
   - If the rule is part of the active policy, you must clone the rule. You cannot edit or remove a rule from the active policy.

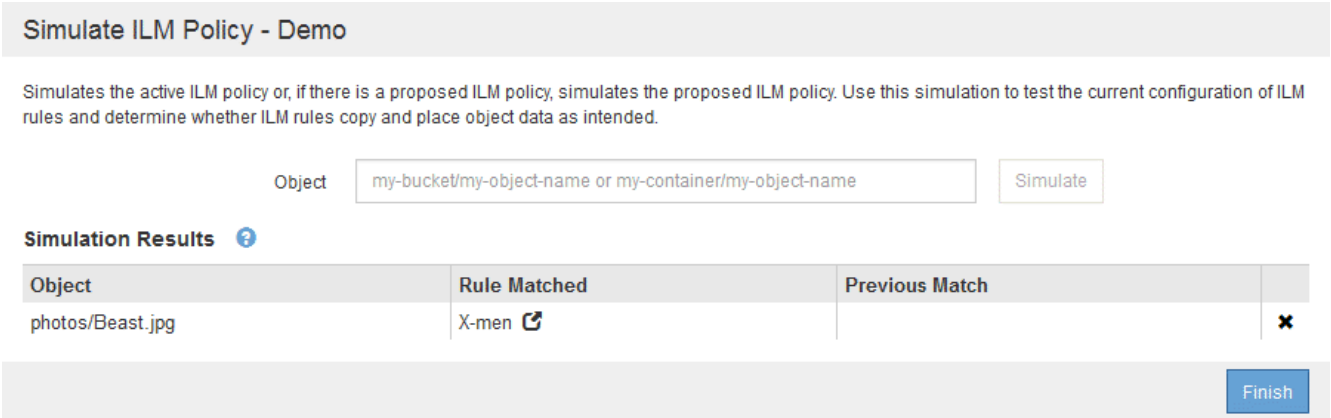
Option	Description
Cloning the rule	a. Select **ILM** > **Rules**. b. Select the incorrect rule, and click **Clone**. c. Change the incorrect information, and click **Save**. d. Select **ILM** > **Policies**. e. Select the proposed policy, and click **Edit**. f. Click **Select Rules**. g. Select the check box for the new rule, uncheck the check box for the original rule, and click **Apply**. h. Click **Save**.

Option	Description
Editing the rule	a. Select the proposed policy, and click **Edit**. b. Click the delete icon ✖ to remove the incorrect rule, and click **Save**. c. Select **ILM** > **Rules**. d. Select the incorrect rule, and click **Edit**. e. Change the incorrect information, and click **Save**. f. Select **ILM** > **Policies**. g. Select the proposed policy, and click **Edit**. h. Select the corrected rule, click **Apply**, and click **Save**.

4. Perform the simulation again.

> Because you navigated away from the ILM Policies page to edit the rule, the objects you previously entered for simulation are no longer displayed. You must re-enter the names of the objects.

In this example, the corrected X-men rule now matches the `Beast.jpg` object based on the `series=x-men` user metadata, as expected.



Activating the ILM policy

After you add ILM rules to a proposed ILM policy, simulate the policy, and confirm it behaves as you expect, you are ready to activate the proposed policy.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.
- You must have saved and simulated the proposed ILM policy.

> Errors in an ILM policy can cause unrecoverable data loss. Carefully review and simulate the policy before activating it to confirm that it will work as intended.

When you activate a new ILM policy, StorageGRID uses it to manage all objects, including existing objects and newly ingested objects. Before activating a new ILM policy, review any changes to the placement of existing replicated and erasure-coded objects. Changing an existing object's location might result in temporary resource issues when the new placements are evaluated and implemented.

About this task

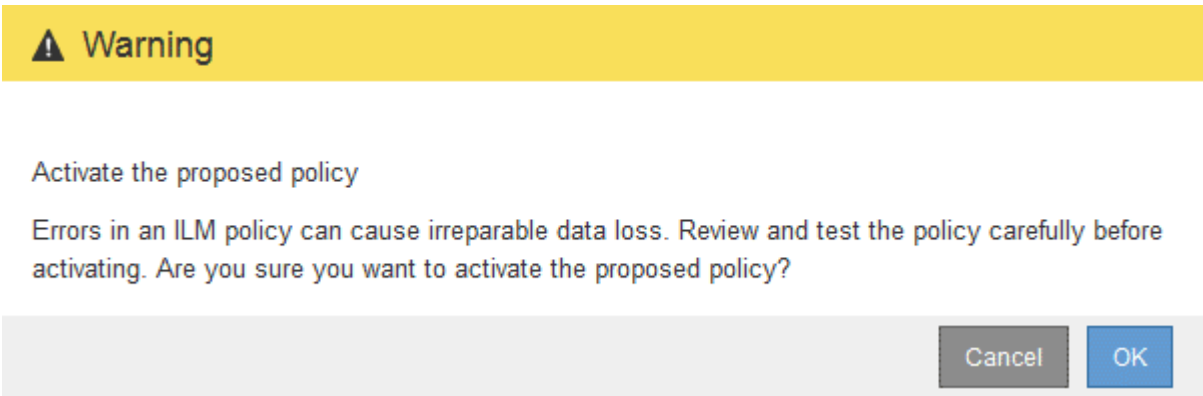
When you activate an ILM policy, the system distributes the new policy to all nodes. However, the new active policy might not actually take effect until all grid nodes are available to receive the new policy. In some cases, the system waits to implement a new active policy to ensure that grid objects are not accidentally removed.

- If you make policy changes that increase data redundancy or durability, those changes are implemented immediately. For example, if you activate a new policy that includes a three-copies rule instead of a two-copies rule, that policy will be implemented right away because it increases data redundancy.
- If you make policy changes that could decrease data redundancy or durability, those changes will not be implemented until all grid nodes are available. For example, if you activate a new policy that uses a two-copies rule instead of a three-copies rule, the new policy will be marked as "Active," but it will not take effect until all nodes are online and available.

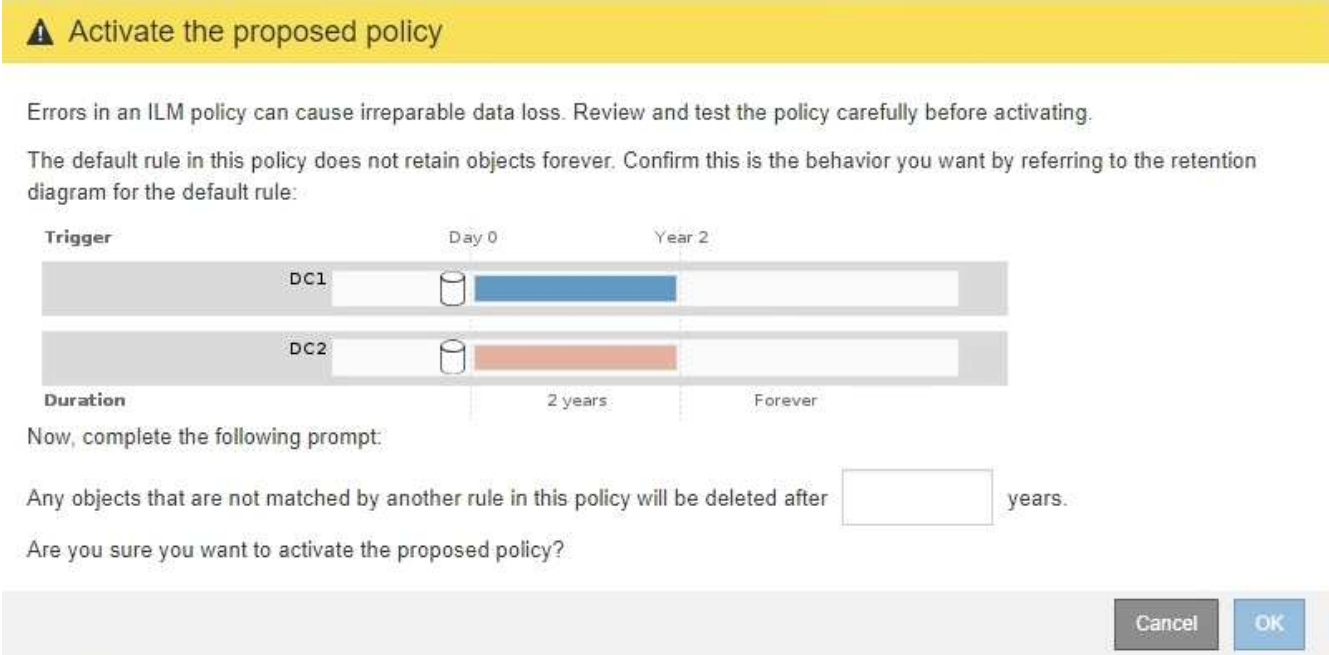
Steps

1. When you are ready to activate a proposed policy, select the policy on the ILM Policies page and click **Activate**.

   A warning message is displayed, prompting you to confirm that you want to activate the proposed policy.

   A prompt appears in the warning message if the default rule for the policy does not retain objects forever. In this example, the retention diagram shows that the default rule will delete objects after 2 years. You must type **2** in the text box to acknowledge that any objects not matched by another rule in the policy will be removed from StorageGRID after 2 years.

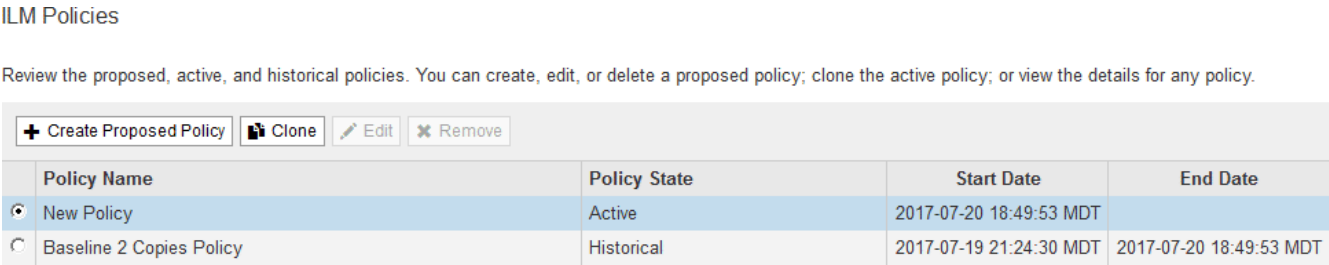


2. Click **OK**.

Result

When a new ILM policy has been activated:

- The policy is shown with a Policy State of Active in the table on the ILM Policies page. The Start Date entry indicates the date and time the policy was activated.



- The previously active policy is shown with a Policy State of Historical. The Start Date and End Date entries indicate when the policy became active and when it was no longer in effect.

Related information

Example 6: Changing an ILM policy

Verifying an ILM policy with object metadata lookup

After you have activated an ILM policy, you should ingest representative test objects into the StorageGRID system. You should then perform an object metadata lookup to confirm that copies are being made as intended and placed in the correct locations.

What you'll need

- You must have an object identifier, which can be one of:
  - **UUID**: The object's Universally Unique Identifier. Enter the UUID in all uppercase.

- **CBID**: The object's unique identifier within StorageGRID. You can obtain an object's CBID from the audit log. Enter the CBID in all uppercase.
- **S3 bucket and object key**: When an object is ingested through the S3 interface, the client application uses a bucket and object key combination to store and identify the object.
- **Swift container and object name**: When an object is ingested through the Swift interface, the client application uses a container and object name combination to store and identify the object.

Steps

1. Ingest the object.
2. Select **ILM** > **Object Metadata Lookup**.
3. Type the object's identifier in the **Identifier** field.

   You can enter a UUID, CBID, S3 bucket/object-key, or Swift container/object-name.

4. Click **Look Up**.

   The object metadata lookup results appear. This page lists the following types of information:

   - System metadata, including the object ID (UUID), the object name, the name of the container, the tenant account name or ID, the logical size of the object, the date and time the object was first created, and the date and time the object was last modified.
   - Any custom user metadata key-value pairs associated with the object.
   - For S3 objects, any object tag key-value pairs associated with the object.
   - For replicated object copies, the current storage location of each copy.
   - For erasure-coded object copies, the current storage location of each fragment.
   - For object copies in a Cloud Storage Pool, the location of the object, including the name of the external bucket and the object's unique identifier.
   - For segmented objects and multipart objects, a list of object segments including segment identifiers and data sizes. For objects with more than 100 segments, only the first 100 segments are shown.
   - All object metadata in the unprocessed, internal storage format. This raw metadata includes internal system metadata that is not guaranteed to persist from release to release.

   The following example shows the object metadata lookup results for an S3 test object that is stored as two replicated copies.

System Metadata

Object ID	A12E96FF-B13F-4905-9E9E-45373F6E7DA8
Name	testobject
Container	source
Account	t-1582139188
Size	5.24 MB
Creation Time	2020-02-19 12:15:59 PST
Modified Time	2020-02-19 12:15:59 PST

Replicated Copies

Node	Disk Path
99-97	/var/local/rangedb/2/p/06/0B/00nM8H$|TFbnQQ}|CV2E
99-99	/var/local/rangedb/1/p/12/0A/00nM8H$|TFboW28|CXG%

Raw Metadata


```
{
    "TYPE": "CTNT",
    "CHND": "A12E96FF-B13F-4905-9E9E-45373F6E7DA8",
    "NAME": "testobject",
    "CBID": "0x8823DE7EC7C10416",
    "PHND": "FEA0AE51-534A-11EA-9FCD-31FF00C36D56",
    "PPTH": "source",
    "META": {
        "BASE": {
            "PAWS": "2",
```


5. Confirm that the object is stored in the correct location or locations and that it is the correct type of copy.

> If the Audit option is enabled, you can also monitor the audit log for the ORLM Object Rules Met message. The ORLM audit message can provide you with more information about the status of the ILM evaluation process, but it cannot give you information about the correctness of the object data's placement or the completeness of the ILM policy. You must evaluate this yourself. For details, see the information about understanding audit messages.

Related information

Review audit logs

Use S3

Use Swift

Working with ILM rules and ILM policies

Once you have created ILM rules and an ILM policy, you can continue to work with them, modifying their configuration as your storage requirements change.

Deleting an ILM rule

To keep the list of current ILM rules manageable, delete any ILM rules that you are not likely to use.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

> You cannot delete an ILM rule if it is currently used in the active policy or in the proposed policy. If you need to delete an ILM rule that is used a policy, you must perform these steps first:
>
> 1. Clone the active policy or edit the proposed policy.
> 2. Remove the ILM rule from the policy.
> 3. Save, simulate, and activate the new policy to make sure objects are protected as expected.

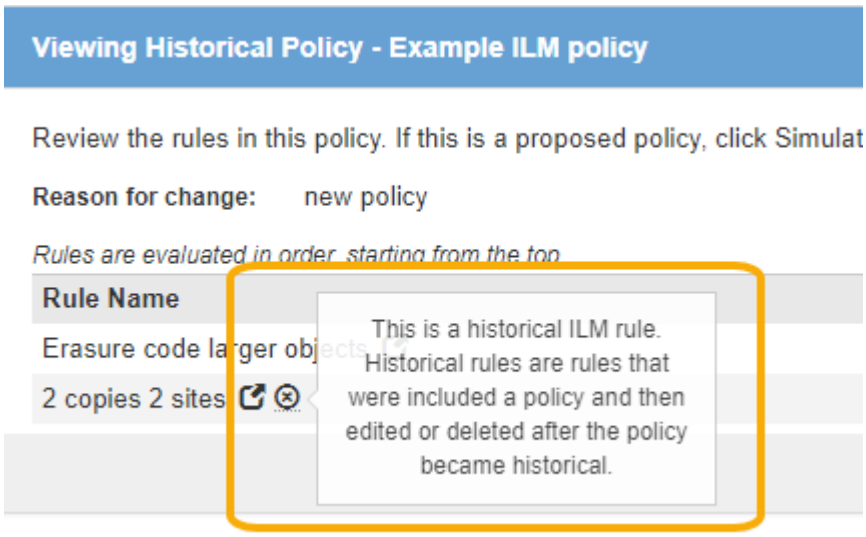
Steps

1. Select **ILM** > **Rules**.
2. Review the table entry for the rule you want to remove.

   Confirm that the rule is not used in the active ILM policy or the proposed ILM policy.

3. If the rule you want to remove is not in use, select the radio button and select **Remove**.
4. Select **OK** to confirm that you want to delete the ILM rule.

   The ILM rule is deleted.

> If you delete a rule that is used in a historical policy, an ⊗ icon appears for the rule when you view the policy, which indicates that the rule has become a historical rule.
>
> 
>

Related information

Creating an ILM policy

Editing an ILM rule

You might need to edit an ILM rule to change a filter or placement instruction.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

About this task

You cannot edit a rule if it is being used in the proposed ILM policy or the active ILM policy. Instead, you can clone these rules and make any required changes to the cloned copy. You also cannot edit the stock ILM rule (Make 2 Copies) or ILM rules created before StorageGRID version 10.3.

> Before adding an edited rule to the active ILM policy, be aware that a change to an object's placement instructions might cause an increased load on the system.

Steps

1. Select **ILM** > **Rules**.

   The ILM Rules page appears. This page shows all available rules and indicates which rules are being used in the active policy or the proposed policy.

   ILM Rules

   Information lifecycle management (ILM) rules determine how and where object data is stored over time. Every object ingested into the StorageGRID Webscale is evaluated against the ILM rules that make up the active ILM policy. Use this page to manage and view ILM rules. You cannot edit or remove an ILM rule that is used by an active or proposed ILM policy.

   + Create | Edit | Clone | ✖ Remove

	Name	Used In Active Policy	Used In Proposed Policy
○	Make 2 Copies	✔	✔
○	PNGs		✔
◉	JPGs		
○	X-men		✔

2. Select a rule that is not being used, and click **Edit**.

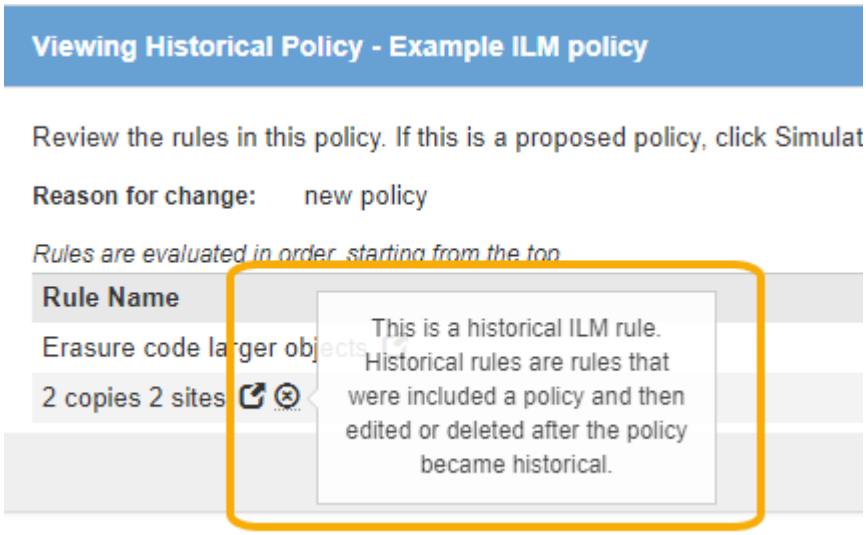
   The Edit ILM Rule wizard opens.

3. Complete the pages of the Edit ILM Rule wizard, following the steps for creating an ILM rule and using advanced filters, as necessary.

   When editing an ILM rule, you cannot change its name.

4. Click **Save**.

If you edit a rule that is used in a historical policy, an ⊗ icon appears for the rule when you view the policy, which indicates that the rule has become a historical rule.



Related information

Creating an ILM rule

Using advanced filters in ILM rules

Cloning an ILM rule

You cannot edit a rule if it is being used in the proposed ILM policy or the active ILM policy. Instead, you can clone a rule and make any required changes to the cloned copy. Then, if required, you can remove the original rule from the proposed policy and replace it with the modified version. You cannot clone an ILM rule if it was created using StorageGRID version 10.2 or earlier.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

About this task

Before adding a cloned rule to the active ILM policy, be aware that a change to an object's placement instructions might cause an increased load on the system.

Steps

1. Select **ILM** > **Rules**.

   The ILM Rules page appears.

   ILM Rules

   Information lifecycle management (ILM) rules determine how and where object data is stored over time. Every object ingested into the StorageGRID Webscale is evaluated against the ILM rules that make up the active ILM policy. Use this page to manage and view ILM rules. You cannot edit or remove an ILM rule that is used by an active or proposed ILM policy.

   + Create | Edit | Clone | ✖ Remove

	Name	Used In Active Policy	Used In Proposed Policy
○	Make 2 Copies	✔	✔
○	PNGs		✔
◉	JPGs		
○	X-men		✔

2. Select the ILM rule you want to clone, and click **Clone**.

   The Create ILM Rule wizard opens.

3. Update the cloned rule by following the steps for editing an ILM rule and using advanced filters.

   When cloning an ILM rule, you must enter a new name.

4. Click **Save**.

   The new ILM rule is created.

Related information

Working with ILM rules and ILM policies

Using advanced filters in ILM rules

Viewing the ILM policy activity queue

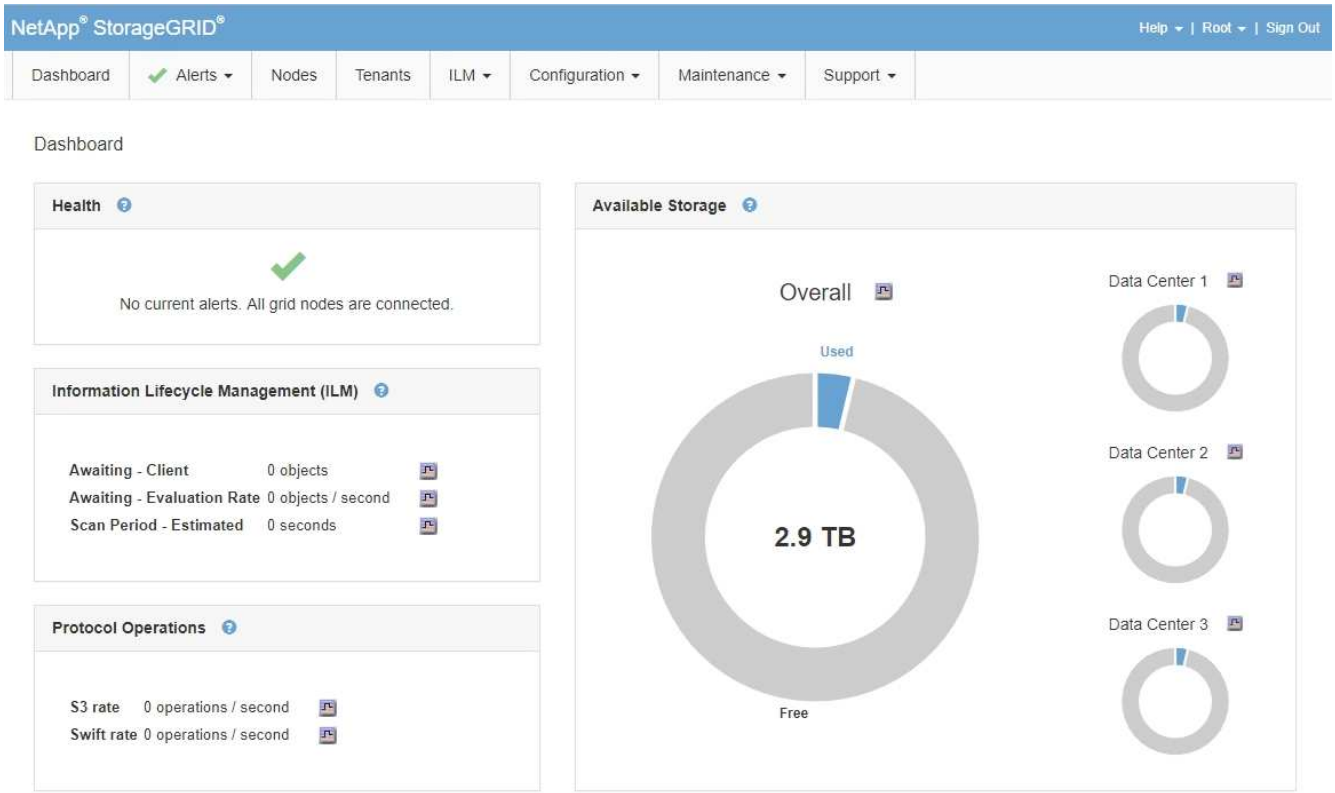
You can view the number of objects that are in the queue to be evaluated against the ILM policy at any time. You might want to monitor the ILM processing queue to determine system performance. A large queue might indicate that the system is not able to keep up with the ingest rate, the load from the client applications is too great, or that some abnormal condition exists.

What you'll need

- You must be signed in to the Grid Manager using a supported browser.
- You must have specific access permissions.

Steps

1. Select **Dashboard**.



2. Monitor the Information Lifecycle Management (ILM) section.

   You can click the question mark to see a description of the items in this section.

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