# Cohesity ServiceNow Integration Plugin

## User Guide

Version 1.0

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# Contents

# Introduction

The Cohesity ServiceNow (SNOW) plugin connects ServiceNow and the Cohesity DataPlatform. It enables the ServiceNow user to perform various operations on the VMs hosted on the Cohesity DataPlatform. The plugin fetches data from the Cohesity DataPlatform and facilitates performing operations such as listing VM, cloning VM, recovering VM, import jobs, etc. in ServiceNow using a secure network. The plugin is available in .xml format.

This guide describes the Cohesity ServiceNow (henceforth referred as SNOW or plugin) plugin workflows. This document applies to v1.0 release.

## Audience

The reader of the Cohesity vRO plugin guide must be familiar with the following:

- Understand IP networking practices
- Using ServiceNow UI
- Familiar with Cohesity DataPlatform and DataProtect

## Prerequisites

| Software | Version | Provider |
|----------|---------|----------|
| ServiceNow | Jakarta (patch2) | ServiceNow |
| Cohesity DataPlatform | 4.x | Cohesity |
| Web browsers | latest | Mozilla Firefox Google Chrome |

- Prior to using the workflows, the following configurations must be set:
- The xml plugin is imported in ServiceNow
- You are added to the Cohesity DataPlatform
- DataPlatform are configured

For details about configurations, refer the Cohesity SNOW Admin Guide.

# Cohesity SNOW Workflows

This section provides an overview of the various tasks that you can perform in the plugin. You have the following workflows available in the Cohesity SNOW plugin:
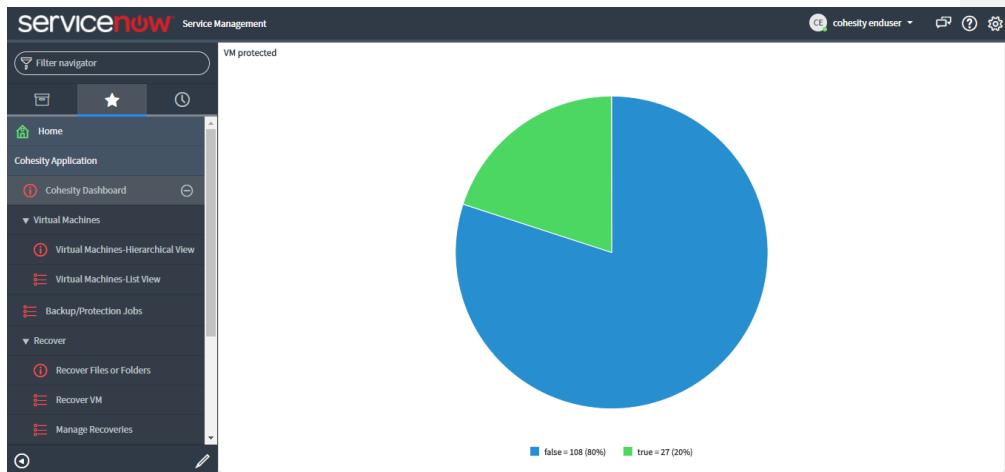
- Dashboard

- Protection Jobs

- Clone VMs and Manage Clones

- Recovery VM, Recover files/folder, Manage Recoveries, VM Recover Points

- Viewing Virtual Machines

- My Requested Items

To view the SNOW workflows:

1. Login to the ServiceNow portal.

2. In the left panel, click the required workflow.
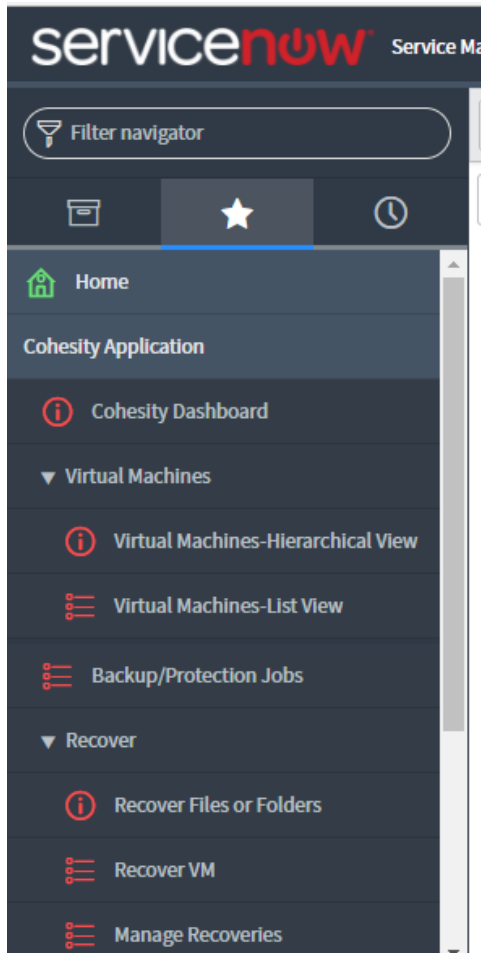
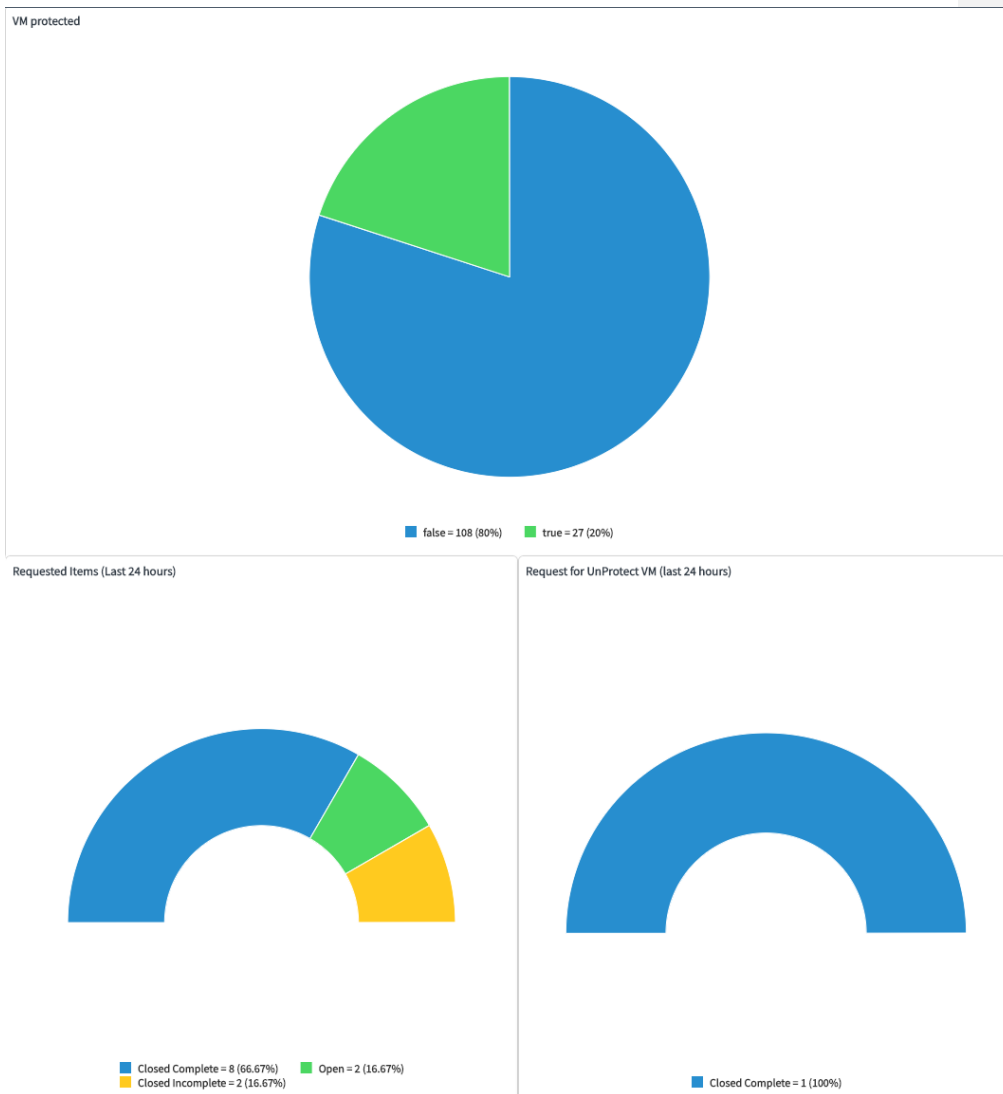3. Click Cohesity Dashboard to view the dashboard. Following is a sample screen.

4. Click the required link to view more details and perform various actions.

## Viewing the Dashboard

Dashboards are the primary feature for monitoring the VM details and requests raised within the SNOW plugin. The dashboard synchronizes all the data from requested items and the VM list view. By default, it displays the requested items for last 24 hours.

To view the dashboard:

1. Login to the ServiceNow portal.

2. In the left panel, click Cohesity Dashboard. Following is a sample dashboard screen.

**VM protected**

false = 108 (80%)   true = 27 (20%)

**Requested Items (Last 24 hours)**

Closed Complete = 8 (66.67%)   Open = 2 (16.67%)
Closed Incomplete = 2 (16.67%)

**Request for UnProtect VM (last 24 hours)**

Closed Complete = 1 (100%)

Scroll down to view the graphs of protected and unprotected VMs, requested items, request for unprotect VM, request for recover VM, request for recover file/folder, request for protect VM, request for move VM, request for clone VM, and my approvals.

# Viewing Virtual Machines

You can view the VMs as a list or in hierarchical view. Following section describes the details of VM listing.

## Virtual Machine List View

You can view a list of virtual machines. The VMs with the status as "true" are protected machines and with the status as "false" are unprotected.

To view the list view of VMs:

1. Login to the ServiceNow portal.

2. In the left panel, click Virtual Machines > Virtual Machines List View. The following screen displays.
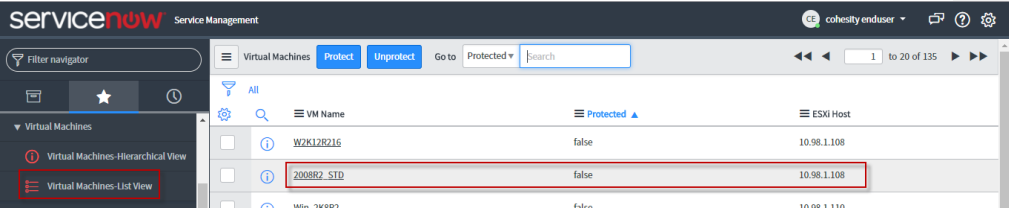


3. To protect an unprotected VM, select the required VM, and then click Protect. Similarly, you can unprotect a VM.
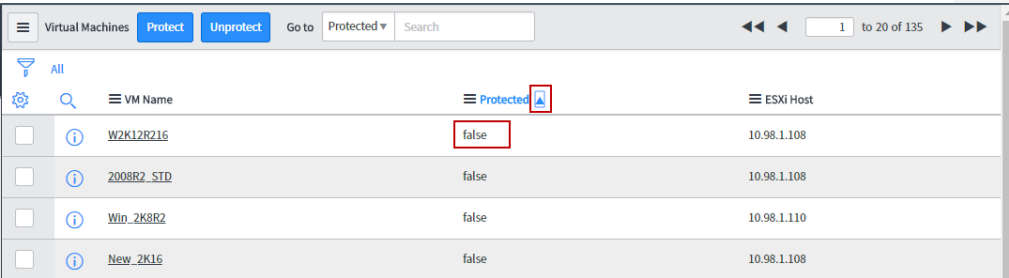


The value as "false" depicts that the VM is unprotected and vice versa. Click the toggle arrow to view the Protected VMs.

## Virtual Machine Hierarchical View

You can view hierarchical lists of the VMs present in Cohesity DataPlatform. They are classified based on whether the VMs are protected or unprotected. The VMs with the "true" value are protected and with "false" are unprotected.

To view the hierarchical view on VMs:

1. Login to the ServiceNow portal.

2. In the left panel, click Virtual Machines > VM Hierarchical View. A graph depicting protected and unprotected VMs is displayed. You can save the graph as a PNG or JPEG or print the chart.

3. Click the respective bar to view the list of protected or unprotected VMs. The Protected status as false depicts unprotected VMs and true depicts protected VM. Following is a sample screen.



4. Click the required VM to view the details of the selected VM.



*Note*: You can further move a VM to another protection job and protect or unprotect a VM. For more details, see the following sections.

## Moving a VM to another Protection Job

You can move a protected VM to another protection job as follows.

To move a VM to another protection job:

1. Login to the ServiceNow portal.

2. In the left panel, click Virtual Machines > Virtual Machine-List View. A list of VM displays.

3. Click on the VM that you want to move to another protection job.

4.    Click the Move to another Protection job button. The Move VMs screen displays.



5.    Select the Current_Protection_Job and New_Protection_Job from the drop-down list as required.

6.    Optionally, you can provide the Reason of the moving the VM in the Reason text box.

7.    Click Order Now on the top right corner of the page. The Order Status page displays.



8.    After placing an order for moving a VM, the administrator needs to approve the request. After the administrator approves the request, the VM is moved to another protection job.

## Protecting and Unprotecting VM

You can unprotect a protected VM and vice versa. The VMs with the "true" value are protected and with "false" are unprotected.

To unprotect a VM:

1.    Login to the ServiceNow portal.

2. In the left panel, click Virtual Machines > Virtual Machine-List View. A list of VM displays.

3. Click on the VM that you want to unprotect. The Virtual Machine details are displayed.



4. Click Unprotect. The Unprotect VM page displays.



5. Select the Protection Job Name from the list.

6. Optionally, enter the Reason.

7. Click Order Now on the right top corner. The Order Status page displays.



8. After placing an order for unprotecting a VM, the administrator needs to approve the request. After the administrator approves the request, the VM is unprotected.

Similarly, you can protect an unprotected VM.

# Backup/Protection Job

This section describes how to run a job. In addition, you can unprotect a protected VM.
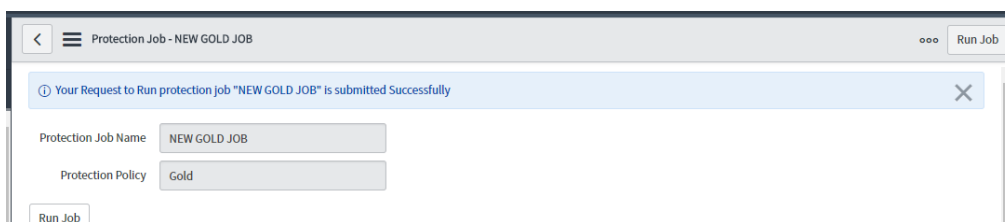
To protect a job:

1. Login to the ServiceNow portal.

2. In the left panel, click Backup/Protection Jobs. ServiceNow lists all existing protection jobs. You can also search for a specific protection job that you want to run.
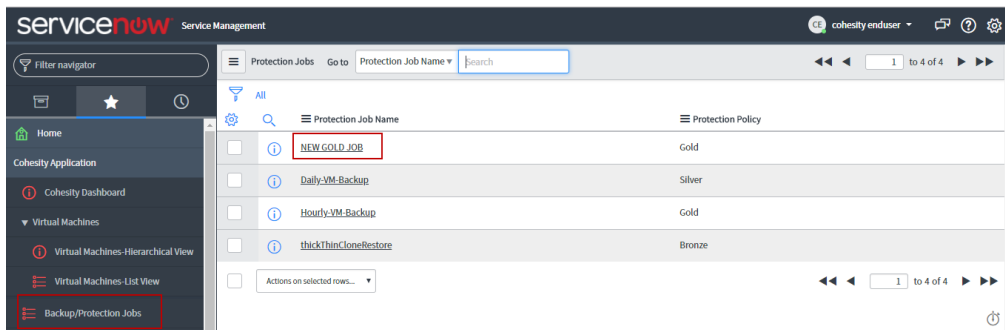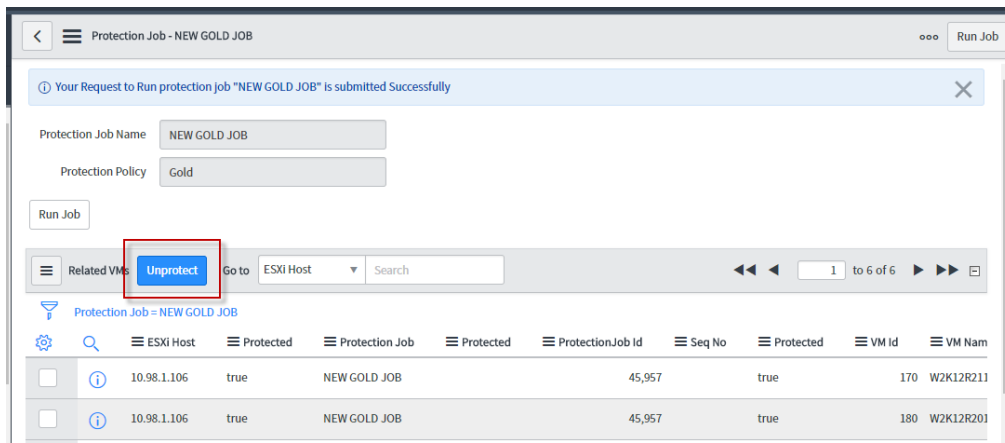


3. Click the required protection job name.
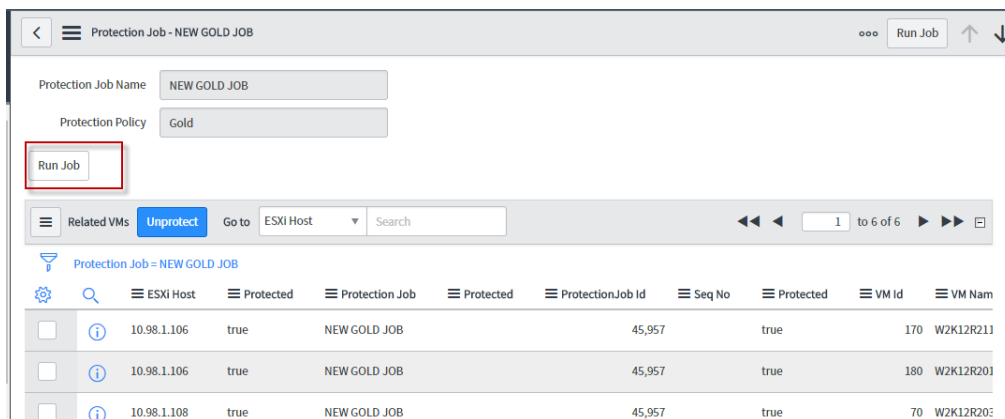


4. Click Run Job. A success notification displays as follows.



5. To unprotect a specific job, select the job and click the Unprotect button.

# Recovery

This section describes how to recover VM, files/folders, and manage recovery.

## Recovering Virtual Machine

This section describes the steps to recover a VM.

To recover VM:

1. Login to the ServiceNow portal.

2. In the left panel, click Recovery > Recover VM. ServiceNow lists all VMs that can be recovered.
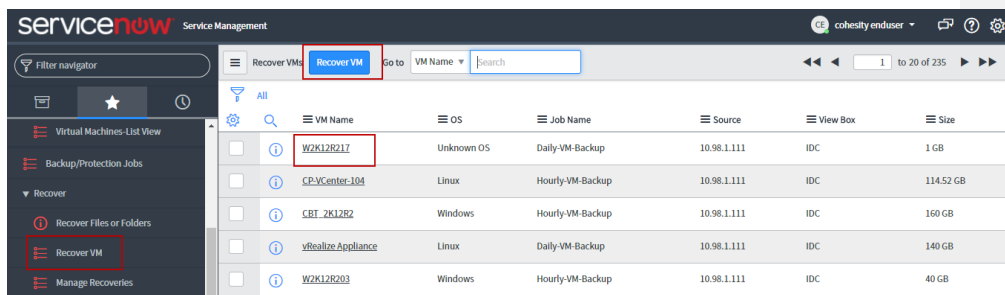


3. Select the VM you want to recover from the list and click Recover VM.

4. Select the Recover Points from the list.

5. If you do not want to change the Recovery Options, click Order Now else, change the Recovery Options and proceed. For details ablout changing Recovery Options, see Changing Recovery Options.

6. After clicking Order Now, the following request notification page displays.



The administrator need to approve your request for items, see My Approvals.

You can view the list of items you have requested as follows.

To approve a request:

1. Open the required instance and login using the Admin credentials.

2. In the left panel, click My Approvals under Cohesity application. Following is a sample screen.

<Need inputs>

Include how to get approval in this section as well.

Viewing Requested Items.

## Changing Recovery Options

This section describes the details to change the recovery points while recovering a VM.

To change the recovery options:

1. Select the "Change Recover Options" checkbox. The following details displays.



2. Select Yes from the drop-down to rename the recovered VM else, go to step step 3. To rename the VM, enter the Prefix and Sufix as required in the following screen.

**Rename Recovered VMs**

Rename Recovered VMs

| Yes ▼ |

Add Prefix

| |

Add Suffix

| |

3. To recover the VM to a new location select "Recover to a new location", else go to the next step. On selecting recover to a new location, select the Source, Resource Pool, and Datasore.

**Recovery Location**

Recovery Location

○ Recover back to original location

● Recover to a new location

✳ Source

| -- None -- ▼ |

Resource Pool

| -- None -- |

Datastore

| -- None -- |

4. Select the Networking Options as required.

**Networking Options**

Networking Options

● Keep original NIC(s) and attach it to original network

○ Detach network

5. Select the Additional Optons are required.

**Additional Options**

☑ Leave Cloned VMs powered off

☐ Continue clone even if errors occur when cloning VMs

Reason(Optional)

| |

6. Click Order Now and proceed to step number 6 in the Order Now section.

## Managing Recoveries

You can view the details of the recovered VMs that will list the success and error if any while recovering the VM.

To manage recovery:

1. Login to the ServiceNow portal.

2. In the left panel, click Recover > Manage Recoveries. The VMs for which recovery was requested displays. It displays the status as "success" or "error" as the status of the recovery request.
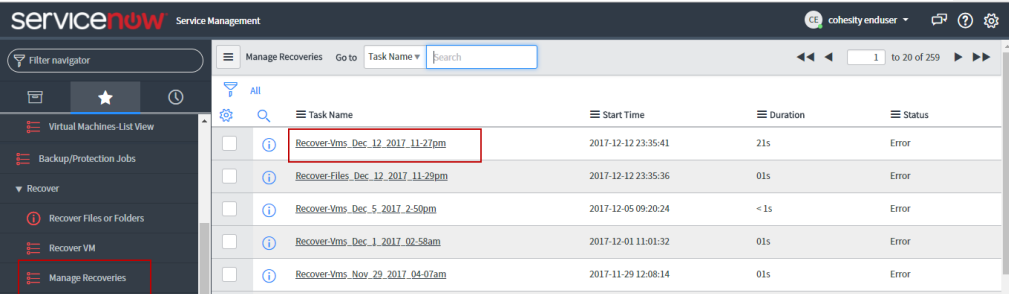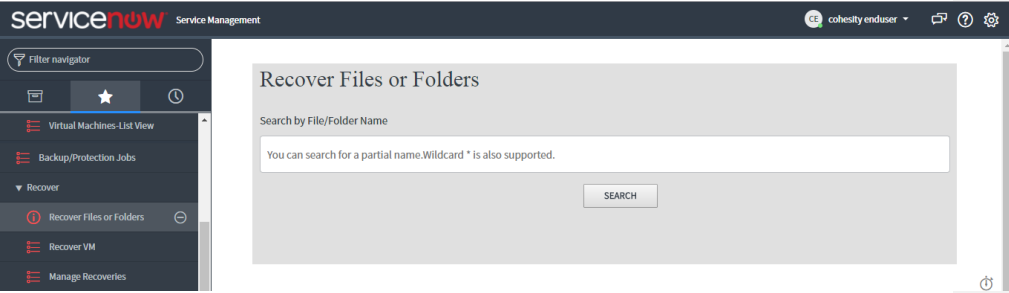


3. You can search for recoveries in the Manage recoveries section. Click the required recovery to view the details.

## Recover Files and Folders

You can recover files and folders as follows.

To recover file or folder:

1. Login to the ServiceNow portal.

2. In the left panel, click Recover > Recover Files or Folders.



3. Enter the file or folder search criteria in the Search box and click SEARCH. A list of files or folders displays.

4. Select the required file or folder and click Recover Files or Folders. The Recover File/Folder page displays.



5. Enter the Recover Options as required. Select the Recover Point and Provide the Task Name as required.



6. Enter the Traget Information as required. Select the Server Name, enter the Username and Password and provide the Recover to Original Location details as required. You can overwrite the existing file/folder as well.

## Target Information

※ Server Name

| IaasVm | ▼ |

✱ Username

✱ Password

Recover to Original Location

| Yes | ▼ |

☐ Overwrite Existing File/Folder

7. Enter the Additional Options as required. You can preserve the filer/folder attributes and continue the recovery options in case there are some errors by selecting the required check box.

## Additional Options

☐ Preserve file/folder attributes

☐ Continue recovery operation even if one of the objects encounters an error

Reason(Optional)

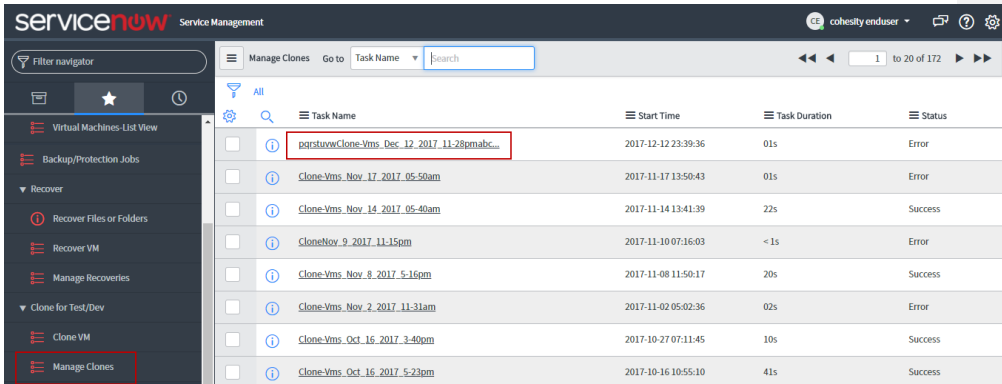8. Click Order Now on the top right corner of the page.

After placing an order for recover of filer/folder, the administrator needs to approve the request. After the administrator approves the request, the recovered file/folder is available for use.

# Cloning VMs

This section describes how to clone and manage clones.

## Cloning Virtual Machine

This section describes the steps to clone a VM.

To clone VMs:

1. Login to the ServiceNow portal.

2. In the left panel, click Clone > Clone VM. The following screen displays.
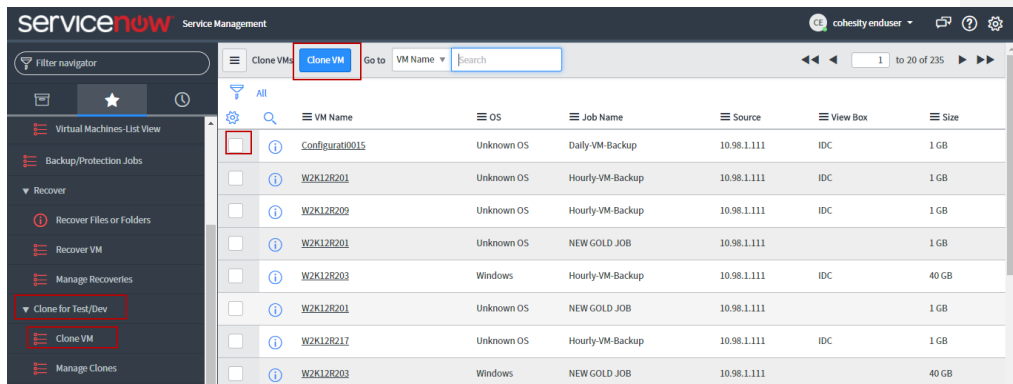
3. Select the check box of the required VM from the list and click Clone VM. The Clone VM page displays.



4. In the Rename Cloned VM field, select Yes from the drop down list to rename the cloned VM. Add Prefix and Suffix as required.

5. Select the Recover Point for the selected VM.

6. Select Source, View, and Resource Pool in the Clone Location section.

7. Select the Attach a new network checkbox to select network ports in the Network Options.

8. Optionally, select the following as required.

## Additional Options

☑ Leave cloned VMs powered off

☐ Continue clone even if errors occur when cloning VMs

9. Click Order Now from the top right corner of the page.

After placing an order for cloning a VM, the administrator needs to approve the request. After the administrator approves the request, the cloned VM is available for use.

## Managing Clones

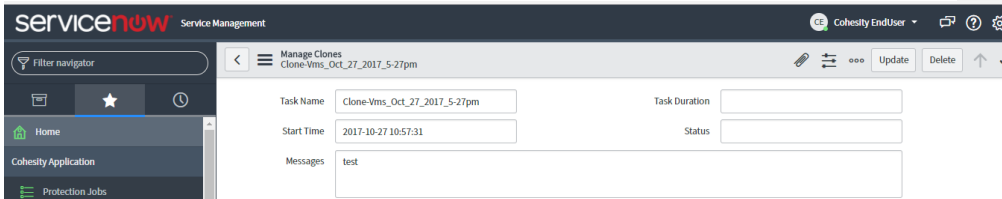You can view the details of the cloned VMs that will list the success and error if any while cloning a VM.

To manage a clone:

1. Login to the ServiceNow portal.

2. In the left panel, click Clone > Manage Clones. The following screen displays.



3. Click the required Task Name to view the details of the cloned task. It displays the VMs that are cloned with the status as Success or Error.



4. Edit the required changes and click Update.

## My Approvals

You can view the list of items you have requested as follows.

To approve a request:

3.  Open the required instance and login using the Admin credentials.

4.  In the left panel, click My Approvals under Cohesity application. Following is a sample screen.

<Need inputs>

Include how to get approval in this section as well.

# Viewing Requested Items

You can view the list of items you have requested as follows.

To list requested items:

1.  Login to the ServiceNow portal.

2.  In the left panel, click My Requested Items. Following is a sample screen listing requested items.



Along with other details, it lists the stage of the request such as request approved, fulfilment, waiting for approval and completed.

3.  Click the required item to view the details.

Follow | Update | Delete

| | | | |
|---|---|---|---|
| Number | RITM0010011 | Opened | 2017-12-13 02:34:32 |
| Item | Add VMs to Protection Job | Opened by | cohesity enduser |
| Request | REQ0010011 | Stage | Waiting for Approval |
| Requested for | cohesity enduser | State | Open |
| Due date | 2017-12-13 16:34:32 | Quantity | 1 |
| Configuration item | | Estimated Delivery | |
| Watch list | | Backordered | |
| | | Order Guide | |

## Variables

* Select Protection Job

Daily-VM-Backup