



Version 4.2

October 2021

Cohesity ServiceNow Integration—Installation and Configuration Guide

ABSTRACT

The Cohesity ServiceNow (SNOW) plugin integrates ServiceNow with Cohesity platform. The main goal of this plugin is to execute the workflows of Cohesity such as data protection, cloning, and recovery from ServiceNow. The SNOW plugin also lets you manage alerts using Webhooks, which is a common and an important part of IT Service Management (ITSM).

The Cohesity ServiceNow Integration—Installation and Configuration Guide describes the process to help you set up and configure the SNOW plugin.

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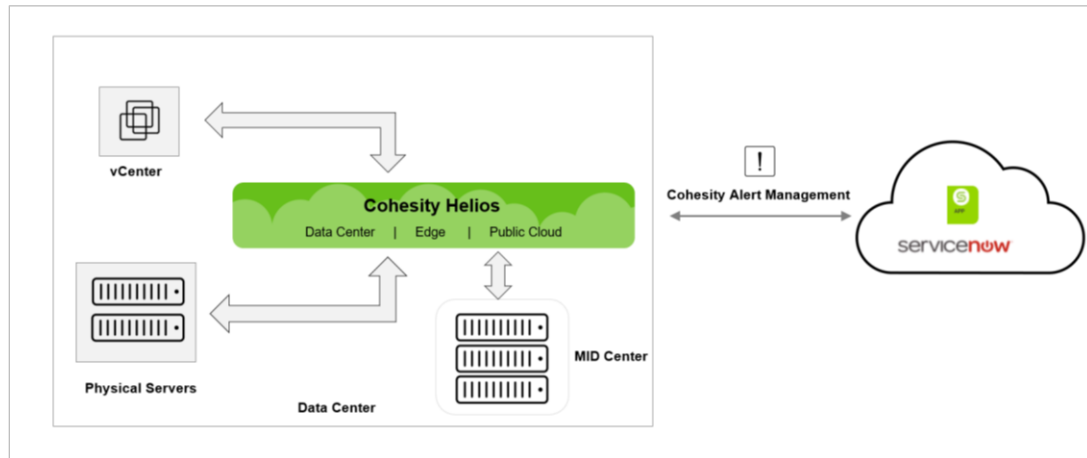
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Introduction

The **Cohesity ServiceNow (SNOW)** plugin fetches data from platform and facilitates performing various operations such as protecting, recovering, and cloning of VMs in ServiceNow using a secure network. See [ServiceNow platform](#) for details.

The following figure illustrates how Cohesity integrates with ServiceNow.

Figure 1: Cohesity Integration with ServiceNow



Cohesity integrates with ServiceNow through REST API to simplify data protection and data management on VMs including workflow automation, backup, and recovery.

Table 1: ServiceNow Interaction with Cohesity

MODULE	INTERACTION WITH COHESITY
vCenter	Once a vCenter is registered with Cohesity, all the resources available in the vCenter are populated to the Cohesity environment, which can then be backed up. The VMs can then be accessed by ServiceNow once the cluster where the VMs are present is registered.
Physical Server	These are the individual physical servers registered with Cohesity. Currently, you have an option to restore files and folders in the physical server that has been backed up.
MID Server	This acts as a medium between ServiceNow and Cohesity. That is, all the API calls are routed via the MID Server. For details, see MID Server Documentation .

Features

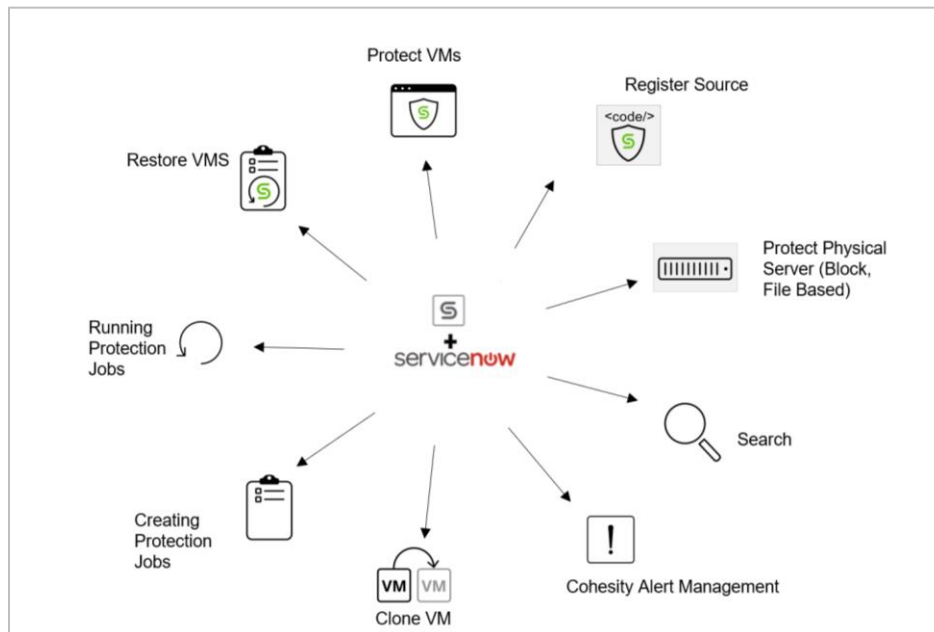
The Cohesity ServiceNow plugin offers the following features:

- Supports a multi-cluster environment
- Availability of Service Catalog with Protection Source, data protection, recovery, and clone workflows

NOTE: The workflows are supported for vCenter and physical sources.

- Option to register and unregister a vCenter and physical server
- Workflow management such as protect VMs, recover VMs, clone VMs, recover files and folders, and creating protection jobs
- Alert management through Webhooks

Figure 2: Cohesity ServiceNow Plugin Features



See [Cohesity Service Now Integration User Guide](#) for details on each of the workflows.

What's New

Latest Release: v4.1

This release 4.1 includes the following features:

Table 2: Release 4.1 Features

VERSION	WHAT'S NEW	REVISION DATE
v4.1	<p>This release includes the following enhancements:</p> <ul style="list-style-type: none"> • Option to schedule the recovery and clone workflow at a specific time slot • Optimization of the search files/folders results • Displaying the file size while restoring the file/folder • Resolving alerts through ServiceNow on a multi-node cluster environment • Few minor bug fixes 	July 2020

Previous Releases

Table 3: Previous Releases Features

VERSION	WHAT'S NEW	REVISION DATE
v4.0	<ul style="list-style-type: none"> • Cohesity Alert Management through Webhook configuration • Simplified cluster synchronization and discovery processes • Service Catalog for workflow process 	April 2020
v3.0	<ul style="list-style-type: none"> • Multi-cluster support • Registering/unregistering of protection sources • Simplified protection job creation process directly from ServiceNow which replaces 	Nov 2019

VERSION	WHAT'S NEW	REVISION DATE
	<p>the earlier process of creating it in the cluster and then syncing the jobs</p> <ul style="list-style-type: none"> • Protection of Virtual Server • Protection of Physical host (block-based and file-based) 	
v2.0	Updated and modernized dashboard for the plugin and with few bug fixes.	May 2019
V1.0	First draft released.	Dec 2018

Software Requirements

Table 4: Software Requirements

COHESITY SNOW PLUGIN VERSION	SERVICENOW RELEASE VERSION	COHESITY
4.1.0, 4.0.0	New York, Madrid, and Orlando	6.3.x or higher
2.0.0, 3.0.0	New York and Madrid	6.2.x or higher

NOTE:

Alert management using Webhooks is supported in Cohesity cluster version 6.3.x or higher EXCEPT 6.5 and 6.5.1a.

Process Overview

The overall process of working with the SNOW plugin is as follows:

1. Install the SNOW plugin along with MID Server configuration.
2. Add ServiceNow users and assign to groups.
3. Run **Fix Scripts** if the application is upgraded to any new version from v2 or v1.
4. Configure Cohesity clusters in SNOW for discovery of resources (vCenter and physical server) and Webhook configuration.
5. Execute workflows in SNOW as described in [Cohesity Service Now Integration User Guide](#).

Setting up the SNOW Plugin

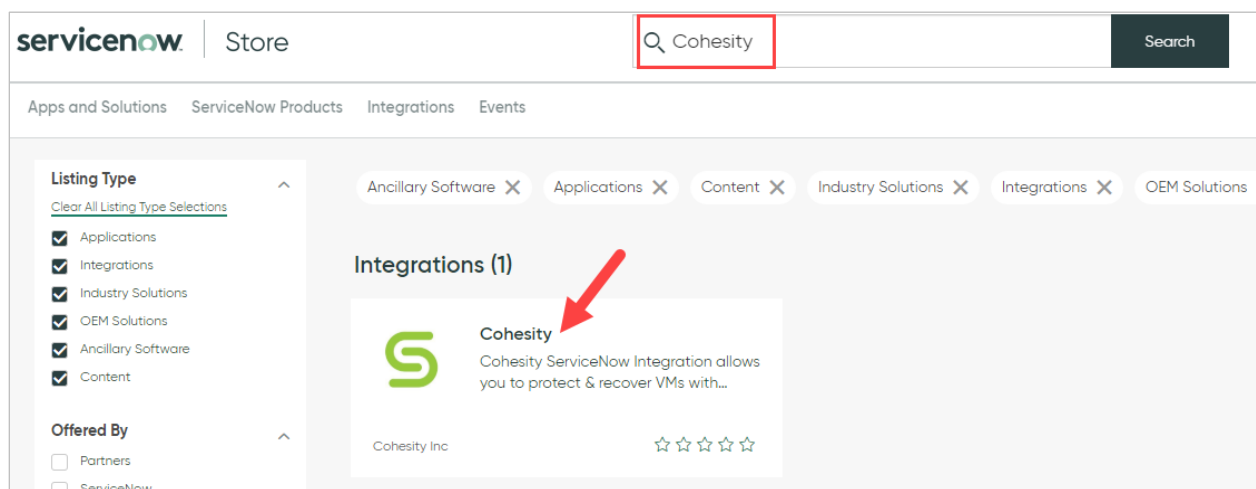
You must have admin privileges to install the plugin. This section describes the installation of the plugin from the ServiceNow Store and also configuration of the MID Server.

Install Cohesity Application in ServiceNow

To install the Cohesity application in ServiceNow:

1. Launch **ServiceNow**.
 - a) Launch the **ServiceNow** instance and log in using the **Admin** user credentials.
 - b) In the search box on the top left pane, type **System Applications** and navigate to **System Applications > Search ServiceNow Store**.
 - c) Click **Find in Store**.

You will be navigated to the **ServiceNow Store** portal and proceed to Step 2 or launch the following ServiceNow Store URL directly and proceed with Step2.
https://store.servicenow.com/sn_appstore_store.do#!/store/home
2. Login to the **ServiceNow Store** using ServiceNow account login credentials.
3. Search for **Cohesity** in the search bar and click on the application.



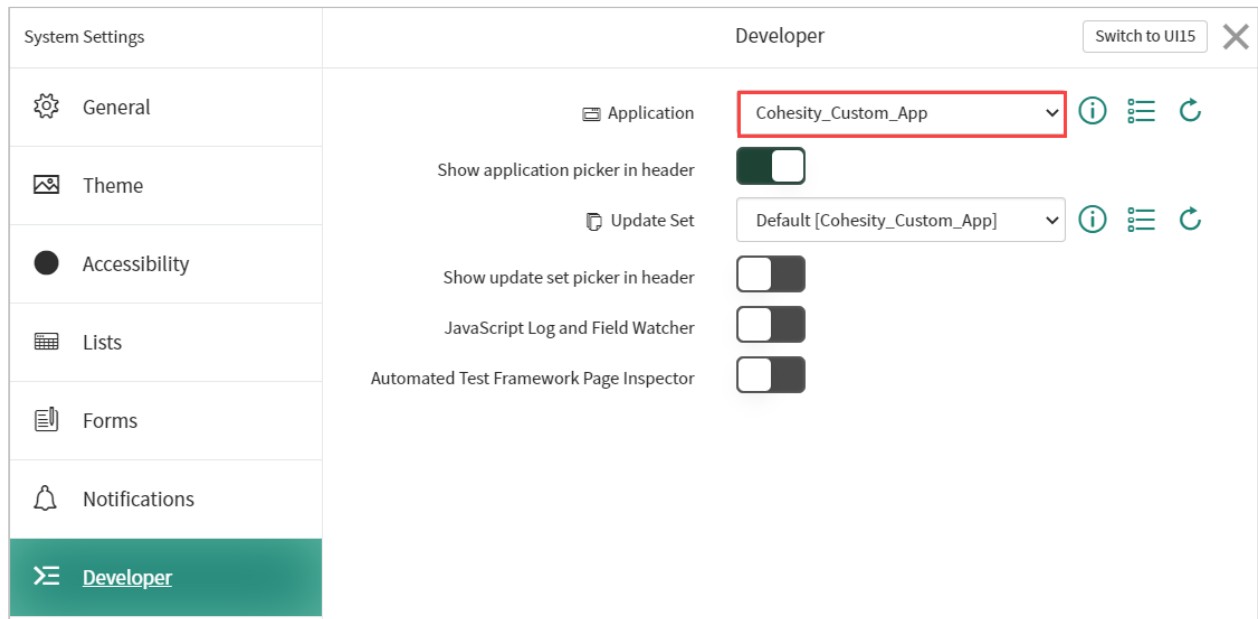
4. In the details page, click **GET** and select **Continue**.
5. Read the requirement and select **Continue**.
6. Select **Make available on specific instance** and select the instance in which the application has to be installed.
7. Accept the terms and conditions of **ServiceNow** store and click **Get**.

Now the application is available on your instance.
8. Find the application under **System Applications > Application > All Apps**.
9. Click **Install**.

NOTE: The installation may take up to 15 mins.

Once the plugin is installed, modify the application scope as follows:

1. In the **ServiceNow** instance, click **Settings** and navigate to the **Developer** tab.
2. In the **Application** field, select **Cohesity_Custom_App** from the drop-down list.



The scope is updated, and the application is ready for use.

(Optional) Install plugin using xml file

If you wish to install the Cohesity ServiceNow (SNOW) plugin using Update Set from xml, contact [Cohesity Support](#) to proceed with the installation and configurations.

Configuring MID Server

The Management, Instrumentation, and Discovery (MID) Server is a Java server that facilitates the communication and movement of data between the ServiceNow platform and external applications, data sources, and services.

Prerequisites

MID Server user must be configured with the following role and group to access the application:

- *Role:* mid_server
- *Group:* Cohesity Admin

Procedure

For details on MID Server installation and setup process, see [MID Server installation](#).

Configuring SNOW Plugin

After you have installed the application in ServiceNow and configured the MID Server, you must add users, configure the Cohesity in ServiceNow's basic configuration page to enable users to implement the workflows in SNOW.

Prerequisites

- Once the plugin has been installed, MID Server users must be created with appropriate roles and groups.
- A user with Cohesity Admin group must also be created to configure Webhooks, configure and discover clusters.
- If you have upgraded the application from version 2 or version 1 to a higher version, run the fix script. (See: [Run Fix Script](#)).

Privileges

The following table lists the various groups and the associated privileges:

Table 5: Groups & Privileges

GROUP	PRIVILEGES
Cohesity Admin	<ul style="list-style-type: none"> • Can configure/update cluster • Start the discovery • Delete the configured cluster • Can trigger any workflows • Can access the dashboard
Cohesity User	<ul style="list-style-type: none"> • Can start the discovery of configured cluster • Can trigger any workflows • Can access the dashboard
Cohesity CloneVM	Group for Cohesity Clone VM request approval
Cohesity MoveVM	Group for Cohesity Move VM request approval
Cohesity ProtectionJob	Group for Cohesity Protection Job creation and deletion request approval
Cohesity ProtectVM	Group for Cohesity Protect VM request approval
Cohesity RecoverFile	Group for Cohesity Recover File request approval
Cohesity RecoverVM	Group for Cohesity Recover VM request approval

GROUP	PRIVILEGES
Cohesity Sources	Group for Cohesity Protection Source register & unregister request approval
Cohesity UnprotectVM	Group for Cohesity Unprotect VM request approval

Add Users

You must first add users and then assign the user to a group. To create a new user:

1. Log in to the **ServiceNow portal** with valid credentials.
The **ServiceNow System Administration** dashboard displays.
2. To create users who can access the Cohesity platform category, click **User Administration**.
3. Click **Users > New** to create a new user.
4. Enter all the new user details, and click **Submit**.
Once the user is added, the user must be assigned to a '**Cohesity Admin**' or '**Cohesity User**' group to access the application.

Add Users to Group

You must assign users to a group so that they can perform all the various tasks in the plugin.

1. Type **Users and Groups** in the search bar. Navigate to **Users and Groups > Groups**.
2. Click the group name to which the user must be assigned.
3. Scroll down and select the **Group Members** tab. Click **Edit**.
4. From the **Collection**, select the users you want to add to the **Group Members List** and click **Save**.
The user is successfully added to the group.

Configure Cohesity Clusters

You can manage multiple Cohesity clusters on ServiceNow.

1. Type **Cohesity** in the search bar. Navigate to **Configuration > Cluster Configuration**.
2. To add a new cluster, click **New**.
3. Enter the following information
 - **Name** : Name of the cluster
 - **MID Server** : Search and select the MID Server through which communication with Cohesity will be established.
 - **Domain** : Domain of the cluster
 - **FQDN** : IP address of the Cohesity cluster
 - **Username** : Username of the Cohesity cluster
 - **Password** : Password of the Cohesity cluster
4. Select the appropriate **Configuration type** based on your requirement. By default, the configuration type is **Discover**.
 - **Discover** : Discover the required resources in the specified Cohesity cluster.
 - **Webhook** : Configure Webhook in the specified Cohesity cluster.
 - **Discover and Webhook** : Discover the required resources and also configure the Webhook in the specified Cohesity cluster.

NOTE:

- A maximum of 5 clusters per MID Server can be added. Any additional cluster must be configured with a different MID Server.
- If auto syncing of the cluster is enabled, you must first analyze the logs to see if the syncing with ServiceNow instance is successful. If auto syncing fails, then you have to manually run the scripts.

Discover Cohesity Cluster

To add/configure a Cohesity cluster, the user must belong to the **Cohesity Admin** group. To initiate discovery of a Cohesity cluster, users can belong to **Cohesity Admin** or **Cohesity User** group.

The following procedure describes the steps to discover Cohesity clusters:

1. Follow steps 1, 2, and 3 as mentioned in [Configure Cohesity Clusters](#).
2. Select the **Configuration type** as **Discover** or **Discover and Webhook**.
3. Under the **Approval** tab, select the workflows which must be explicitly approved after executing the workflows (applicable only when the configuration type is Discover/Discover and Webhook).
4. Click **Discover Cluster** or **Discover and Webhook** accordingly.


Configure Webhook

1. Follow steps 1, 2, and 3 as mentioned in [Configure Cohesity Clusters](#).

2. Select the **Configuration type** as **Webhook** or **Discover and Webhook**.

Next click on the **Webhook Configuration** tab, select the **Alert Category** and **Alert Severity** (applicable only when the configuration type is Webhook/Discover and Webhook).

Note: If a specific category or severity is not selected, then it applies all by default.

3. To select **Alert Category**, click the lock icon  to load the alert categories to be added to the Webhook configuration. You can search for the specific alert category or analyze the **Alert Category** list table.

4. Select the alert categories and save by clicking  to lock the alert categories selected.

5. Similarly, select the **Alert Severity** from the drop-down by unlocking the **Alert Severity** field.

6. Once alert severities have been selected, click  to save the selected values.

7. Click **Configure Webhook** or **Discover and Webhook** accordingly.

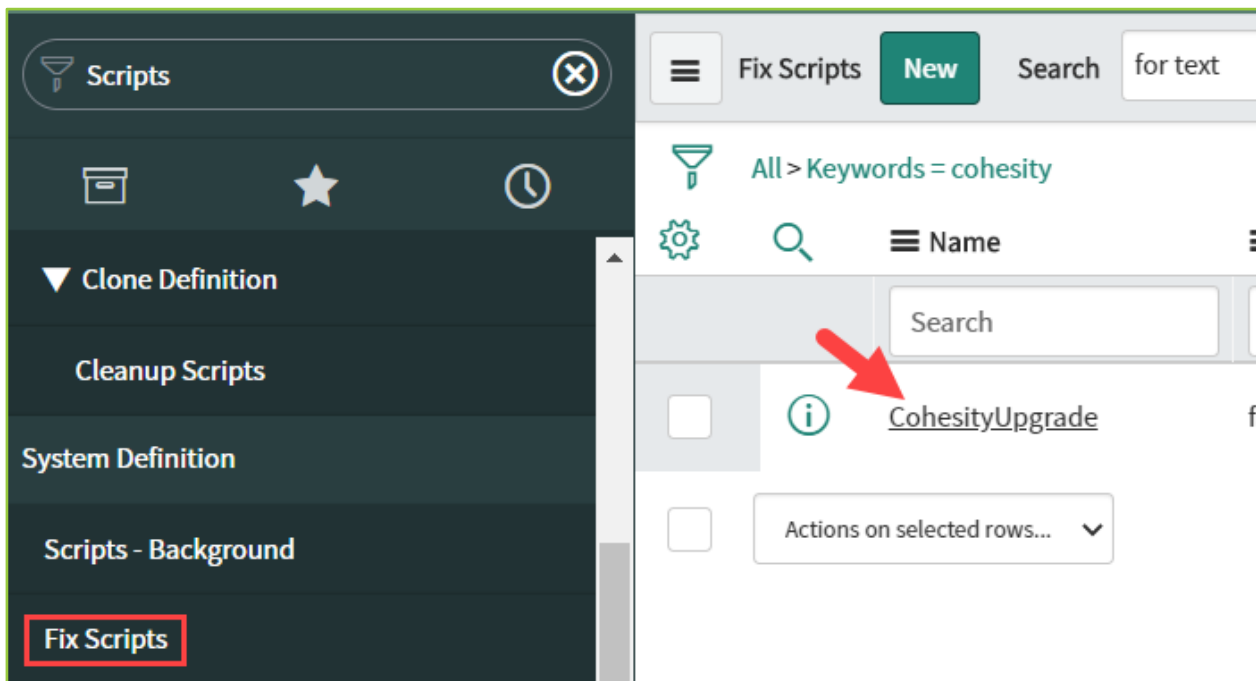
Once the **Discover and Webhook** button is clicked, all the Cohesity resources are discovered and populated in the **ServiceNow** database, and **Webhook** is configured with the selected category and severity values.

Troubleshooting

Run Fix Scripts if Application is Upgraded from v2 or v1

If the user is already working with an older version (version 2 or version 1), run the fix script '**CohesityUpgrade**' once the application is upgraded to a higher version, to remove all the discovered resources from the configured cluster.

1. Type **Scripts** in the search bar. Navigate to **System Definition > Fix Scripts**.
2. Search for the relevant script with the string **Cohesity** and select 'CohesityUpgrade' fix script.



3. Click the script and enable **Active** to activate the script.
4. Click **Run Fix Scripts** and **Proceed**.
5. Inactivate the script once the script is executed, by disabling the **Active** field and save the script.
6. Once the script execution is complete, the application is ready to be used.

Your Feedback

Was this document helpful? [Send us your feedback!](#)

ABOUT COHESITY

[Cohesity](#) radically simplifies data management. We make it easy to protect, manage, and derive value from data -- across the data center, edge, and cloud. We offer a full suite of services consolidated on one multicloud data platform: backup and recovery, disaster recovery, file and object services, dev/test, and data compliance, security, and analytics -- reducing complexity and eliminating [mass data fragmentation](#). Cohesity can be delivered as a service, self-managed, or provided by a Cohesity-powered partner.

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