

COHESITY

# Cohesity Global Support & Services Handbook

## **Welcome Guide**

August 2020

## Welcome to the Cohesity Family!

Data is exploding, and becoming the most valuable resource in the world.

This is why we're excited to be working with you to solve [mass data fragmentation](#), consolidating the silos of data you have across different locations, clouds, and management systems that prevent you from fully leveraging all of your data for business value.

Our mission is to simplify data management. To empower your team to tap into all of your enterprise data—in backups, archives, file shares, object stores, and data used for dev/test and analytics—to derive insights that give your organization a competitive edge.

We're customer-obsessed (it's a core value) with a world-class support team, focused on your success. We pride ourselves on maintaining excellence.



In this handbook, you'll find details about everything you need to get started—from our internal Support and Helios portals to our Galaxy community—as you begin your relationship with Cohesity.

Our success only happens when YOU are successful, so stay in touch. Let us know what works and doesn't work for you so we can continue to improve and keep learning. I'm looking forward to hearing from you as we redefine data management.

Sincerely,  
Andrew Dobrov  
SVP Global Support and Services

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### Terms and Conditions

Cohesity Support and Maintenance Terms and Conditions (the "Support Terms") apply to any customer ("Customer") who is entitled to receive support services from Cohesity, Inc. ("Cohesity") for specific Cohesity software product(s) (the "Software Product") and/or hardware product(s) (the "Hardware Product" and together with the Software Product, "Products") pursuant to a written agreement or order between Customer and Cohesity (or its authorized reseller or distributor, as applicable) (an "Agreement"). Customer is entitled to receive only the support specified for the applicable Support Level and term that Customer has ordered and paid for pursuant to such Agreement. To the extent Cohesity has become obligated for support and maintenance, the following will apply with respect to Products so long as they remain Cohesity's standard terms for support and the Customer is in full compliance with Cohesity's end-user agreement (the "EULA").

## Our Services & Support Commitment to You

The Cohesity technical team is dedicated to providing your organization with complete, responsive, high-quality services, boosting your experiences with Cohesity products. Our services and support commitment to you focus on delivering:

- Enterprise-grade support and services
- World-class online experiences
- Global scalability

Staffed by talented professionals—with expertise honed at enterprise industry leaders such as VMware, Cisco, Google, Nutanix, and more—our support and services professionals strive to always provide the highest level of customer satisfaction.

Whether you are deploying Cohesity software on Cohesity appliances, in the cloud, in hypervisors, or deploying Cohesity on one of our certified partner appliances, you can expect:

- Timely and knowledgeable responses for fast case resolution
- Easy access to software
- Up-to-date documentation
- Helpful and current knowledge base articles
- Visual dashboarding of your cluster information
- Peer-to-peer community engagement opportunities
- Accurate information to assist your decision making

## Our Support Program Overview

Cohesity support and services professionals work in combination with our appliance and application partner technical support teams to address your questions and successfully solve your issues. The following table outlines the program and first point of contact, based on your deployment:

Cohesity Solution	First Point of Contact
Cohesity software deployed: <ul style="list-style-type: none"> <li>• On Cohesity appliances</li> <li>• In the cloud</li> <li>• In hypervisors</li> </ul>	Contact Cohesity Support via <a href="#">web</a> or telephone.
Cohesity software on certified partner appliances: <ul style="list-style-type: none"> <li>• Cisco</li> <li>• Dell</li> <li>• Hewlett-Packard Enterprise (HPE)</li> <li>• Fujitsu</li> </ul>	For software issues, open a case with Cohesity. For hardware issues, Cohesity advises following the <a href="#">published field replacement guides</a> , and Cohesity Support is available to review a suspected hardware issue. Hardware replacements must be requested directly from the hardware vendor. Cohesity Support is available to assist you and the hardware vendor during the replacement process.  If you are unsure where to open a case, the Cohesity Support team is trained on partners' solutions and can help refer you appropriately.  Learn more about service for Cohesity and partner's solutions: <ul style="list-style-type: none"> <li>• <a href="#">Cohesity and Cisco solutions</a></li> <li>• <a href="#">Cohesity and HPE solutions</a></li> <li>• <a href="#">Cohesity and HPE Greenlake</a></li> <li>• <a href="#">Cohesity and Dell solutions</a></li> </ul>
Third-party applications (Marketplace Apps) running on the Cohesity platform	Installation issues - contact Cohesity Support. Applications issues - contact application vendor.

### Cohesity Software Support

The following levels apply to you if your organization has Premium support and maintenance services from Cohesity. For more information, review the [Cohesity Support and Maintenance Terms and Conditions](#).

Priority Level	Cohesity Response Time Obligation	Initial Response Time
<b>Priority 1</b>	Respond within an hour and promptly begin the following procedures: (i) assign Cohesity engineers to correct the error; (ii) notify Cohesity management that errors have been reported and of steps being taken to correct error(s); (iii) provide Customer with periodic reports on the status of the corrections; and (iv) in the case of software products, initiate work to provide a workaround or fix or, in the case of hardware products, initiate hardware support based on hardware support terms.	<b>1 hour</b>
<b>Priority 2</b>	Respond within the relevant time and promptly commence the following procedures:	<b>2 hours</b>
<b>Priority 3</b>	(i) assign Cohesity engineers to correct the error; (ii) provide periodic reports on the status of the corrections; and (iii) in the case of software products, initiate work to provide a workaround or fix or, in the case of hardware products, initiate hardware support based on hardware support terms.	<b>3 hours</b>
<b>Priority 4</b>	Use reasonable efforts to acknowledge the problem, report and commence reasonable efforts to supply a fix for the error.	<b>Reasonable efforts</b>

**IMPORTANT:** Cohesity supports qualified hardware from third-party vendors. Customers should update such qualified hardware and associated firmware to the minimum supported levels as listed in the product documents on the Cohesity Support site.

### Cohesity Hardware Support

If you are using Cohesity hardware products and have purchased a hardware support agreement, then Cohesity will deliver to you, at no charge, the replacement parts that Cohesity determines are required within the Part Delivery Time:

Location	Parts Delivery Time
USA (incl. Hawaii, Alaska, Puerto Rico)	Next Business Day
EU Countries & UK	Next Business Day
Non-EU Countries in Europe	Best Efforts
Australia, Singapore, Japan, China (Beijing, Shanghai, Shenzhen, Guangzhou)	Next Business Day
Rest of World	Best Efforts
<b>Add-On Services</b> (may be added for an additional fee): <ul style="list-style-type: none"> <li>• Hardware Non-Return Option</li> <li>• 4-hour Hardware Services (designated locations only)</li> </ul>	

Please note, actual delivery times might vary if your location is remote and/or if common carriers encounter delays or require special transportation arrangements for reaching your site, or if Customs clearances impose delays. As part of the Return Material Authorization (RMA) process, a case is required for hardware troubleshooting and product (or part) replacement. For more information on the RMA process, review the [Cohesity Support and Maintenance Terms and Conditions](#).

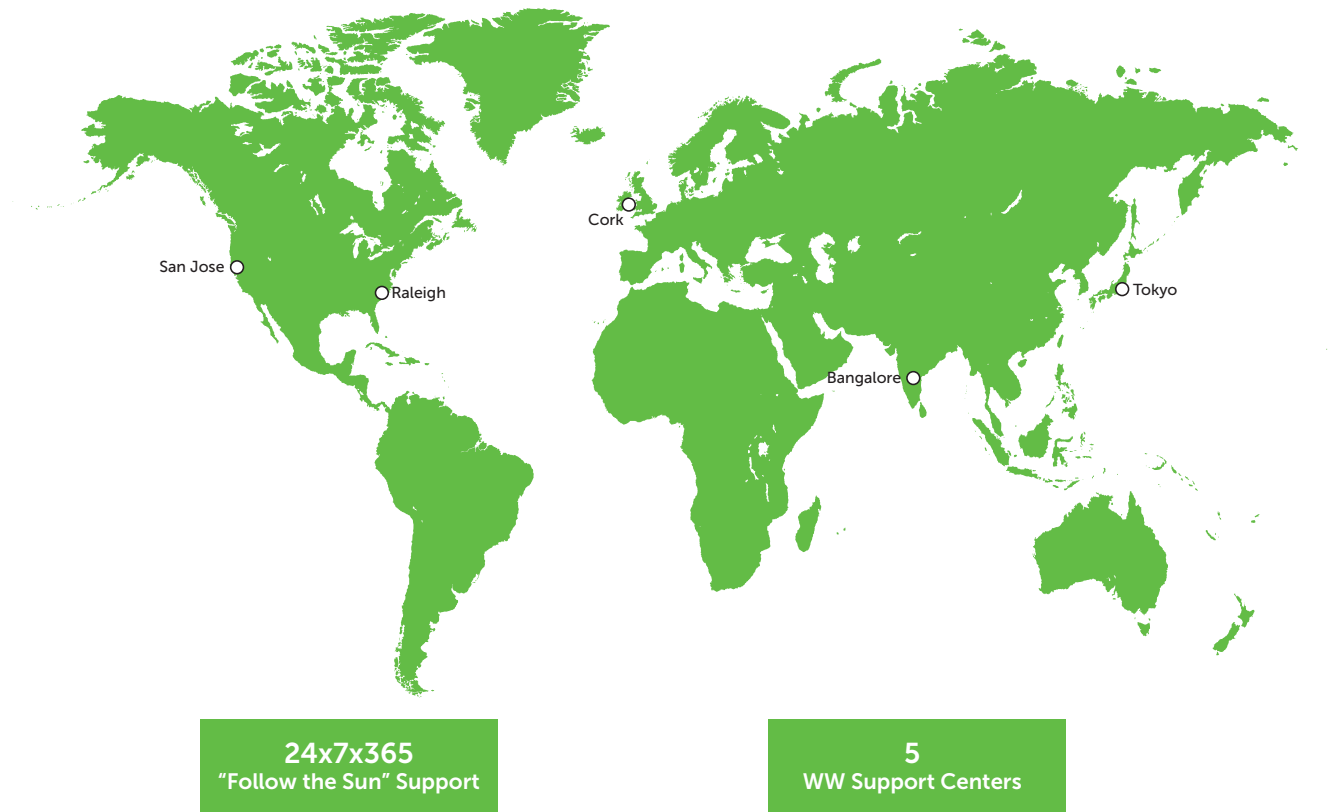
Cohesity does NOT support hardware other than Cohesity’s own Hardware Products. Although we don’t open cases with hardware vendors on your behalf and cannot arrange your RMAs, we can guide you to the right people and places.

### U.S. Federal Government Customers

For existing qualified U.S. federal government customers, you are entitled to all of our Premium support benefits, and your requests will be handled by U.S. citizens. We have a dedicated support number for your convenience: **1-202-470-1821**

## Availability of Our Technical Teams

We strive to serve your organization with local support professionals from our offices in North America, Asia-Pacific, and Europe.



## Contact Our Support Team

You can reach our Cohesity technical support professionals every day of the year, at all times of the day.

Visit us on the Web: <https://support.cohesity.com/login>

Via phone: For the full list of global technical support numbers, visit our [Cohesity Support page](#).



## Key Resources: Three Cohesity Channels

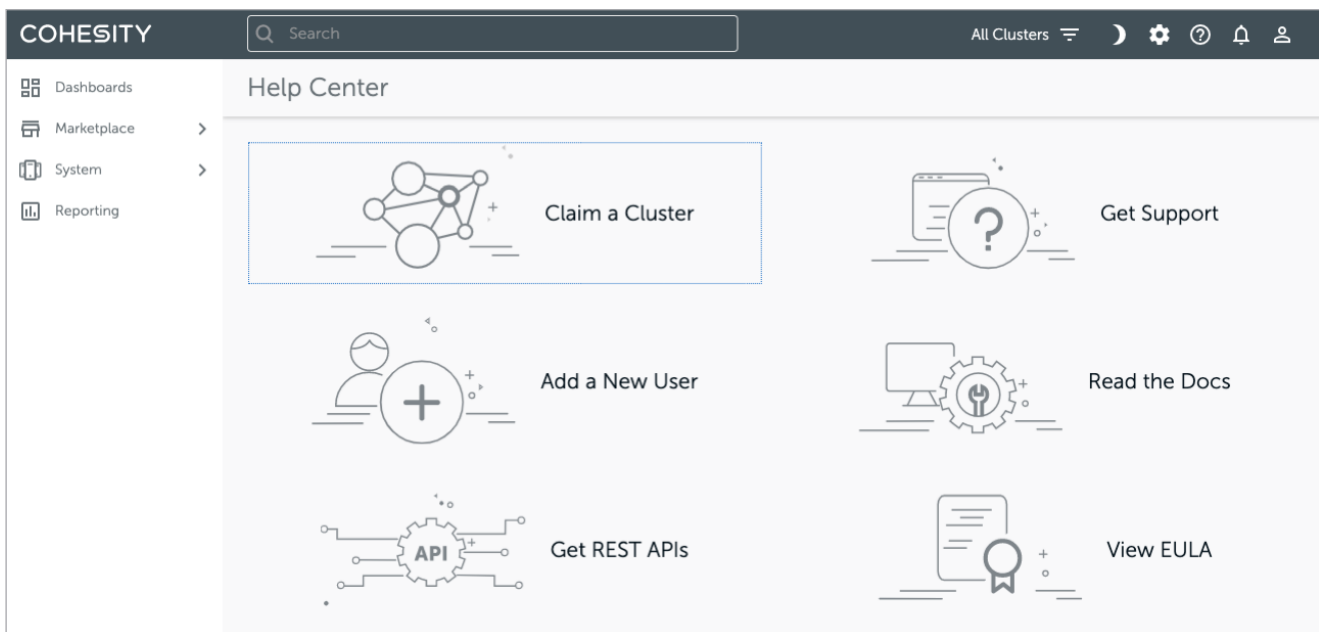
Cohesity provides three main resources to manage your Cohesity environment, keep you informed, and get support:

- Helios. Get support for all your clusters from the Cohesity Helios Help Center.
- Support Portal. Create and track cases, get software updates, and find answers in our documentation and knowledge base articles.
- Galaxy. Join our VIP customer community to connect with other passionate industry experts.

### Cohesity Helios

[Cohesity Helios™](#) is the go-to location to start and manage your Cohesity experience. From the Helios Help Center page, you can quickly get help from our world-class support staff, claim (or connect) a cluster to Helios, access documentation and REST APIs, add a new user, and view our EULA.

**NOTE:** You don't need to have a cluster that is connected to Helios to access the Helios portal.



[Connecting clusters to Helios](#) dramatically simplifies managing all of your data and applications, wherever they reside—on-premises, in the public cloud, or at the edge. Helios is a SaaS-based platform that combines a single, global user interface (UI) with built-in machine learning to provide you operational insights and actionable recommendations to help meet your SLAs and ensure business continuity.

With Helios, you can:

- Manage all your Cohesity clusters from a single UI.  
**NOTE:** Make sure your clusters are connected to Helios.
- Generate global reports for deeper visibility.
- Search and take actions across your global footprint.
- Monitor your clusters continuously.
- Orchestrate cluster upgrades.
- Proactively plan for emerging business requirements with capacity prediction.
- Monitor machine learning-based anomalies detection for ransomware attacks.
- Download and manage applications from the [Cohesity Marketplace](#).
- Add users to the support channel and manage their permissions.

Helios also provides a proactive wellness mechanism that auto-generates cases based on predictive alerts, cluster alerts, and bundle logs (see the full list of proactive alerts in our [Helios Auto-generated Cases for Proactive Wellness](#) knowledge base article). The contact information used for auto-generated cases and notifications is determined by the contact email address that you associated with the cluster during [cluster registration](#). It's crucial that you have an email address associated with each of your clusters. If you need to update the contact for a cluster, please contact our support team.

Access Helios at <https://helios.cohesity.com/> by logging in with your Cohesity Support credentials or SSO if you are using an Identity Provider. Your Helios Administrator can give you access by adding you as a user. You will receive a welcome email with your username and a link to activate your account and set your password. The first person in your organization given access to the Cohesity Support portal by your Cohesity Account Team will have Helios Admin access.

Learn more [about Helios](#) in the online Help.

## Cohesity Support Portal

Visit the Cohesity Support portal to explore all of our resources and programs. You'll need login credentials to access the secure Support web portal. If you do not have access to the Support portal, your Helios Admin can give you access by adding you as a user on Helios. (And note that the type of role and cluster access don't matter for this). You will receive a welcome email with your username and a link to activate your account and set your password.

From the Cohesity Support portal you can:

- Create and manage existing cases.
- Access and download Cohesity software updates.  
**NOTE:** If the cluster is connected to Helios, you can do this directly in Helios.
- Access product documentation and knowledge base articles.
- Submit IDEAS and feedback, and vote on new product ideas
- Contact support via email or phone

## Create a New Support Case

To expedite your request the first time through and in subsequent requests, make sure you have this information to open your Cohesity Support case online, by email, or phone:

- **Account Name.** Your company name.
- **Contact Name.** Your name and email.
- **Cluster Id.** Your cluster's Id number.
- **Type of issue.** Configuration, Documentation, Errors or Alerts, Hardware, etc.
- **Description.** A detailed description of your issue and its impact on your business.
- **Priority.** Select the number that reflects the impact of the issue on your business.

The screenshot shows the 'Create New Support case' form within a web application. The navigation bar at the top includes 'Home', 'My Cases', 'Knowledge Base', 'Field Messages', and 'Asset Inventory'. The form fields are as follows:

- Account Name \***: Search Accounts... (with a pencil icon)
- Contact Name \***: Search Contacts.. (with a pencil icon)
- Cluster Id**: Search Clusters.. (with a pencil icon)
- Alert ID / Error String ⓘ**: (empty text field)
- Type \***: (empty dropdown menu)
- Subject \***: (empty text field)
- Description \***: (empty text area)
- Priority \***: P3 (dropdown menu)
- SW Version (Affected)**: (empty text field)

At the bottom of the form, there are two buttons: a green 'Submit' button and a white 'Cancel' button. A hand cursor is pointing at the 'Submit' button. A note on the right side of the form says 'Start typing in Subject to see suggestions'. Several blue circular callouts with pencil icons highlight the search fields, and hand cursors highlight the dropdown menus for Type, Priority, and SW Version.

The priorities definitions and their initial response time are:

Priority Level	Priority Definitions	Initial Response Time
<b>Priority 1</b>	<p>Error that causes the production use of a product to be stopped, or so severely affected that you cannot reasonably continue to use the product.</p> <p>The diagnosis and resolution of the issue might require remote access to the system (that is, you might need to enable the Support Channel).</p> <p>NOTE: If remote access is not available, you might be required to access the system console to review error messages or to run diagnostics on the system and supply the results.</p>	<b>1 hour</b>
<b>Priority 2</b>	<p>Error causes important product features to be unavailable (and, in the case of software products, with no acceptable workaround), but your production use is capable of continuing.</p> <p>Priority 2 issues are addressed during your local business hours—8:00 AM to 5:00 PM (excluding weekends and public holidays in the United States, unless continuous effort is required). If continuous effort is required, you must be able to provide complimentary resources to work with Cohesity Support.</p>	<b>2 hours</b>
<b>Priority 3</b>	<p>Error causes important product features to be unavailable (but, in the case of software products, a workaround is available), or less significant software product features to be unavailable, but your production use is capable of continuing.</p> <p>Priority 3 issues are addressed by Cohesity Support during your local business hours—8:00 AM to 5:00 PM (excluding weekends and public holidays in the United States, unless continuous effort is required).</p>	<b>3 hours</b>
<b>Priority 4</b>	<p>For general questions or inquiries about recommended product modifications. There is no loss of service.</p> <p>Priority 4 issues are addressed by Cohesity Support during your local business hours—8:00 AM to 5:00 PM (excluding weekends and public holidays in the United States).</p>	<b>Reasonable efforts</b>

## Cohesity Cases Involving Hardware

Any potential Cohesity hardware-related issues require a case for hardware troubleshooting and product (or part) replacement to be opened. All returns must be authorized and assigned a Return Materials Authorization (RMA) number in advance by Cohesity Support staff.

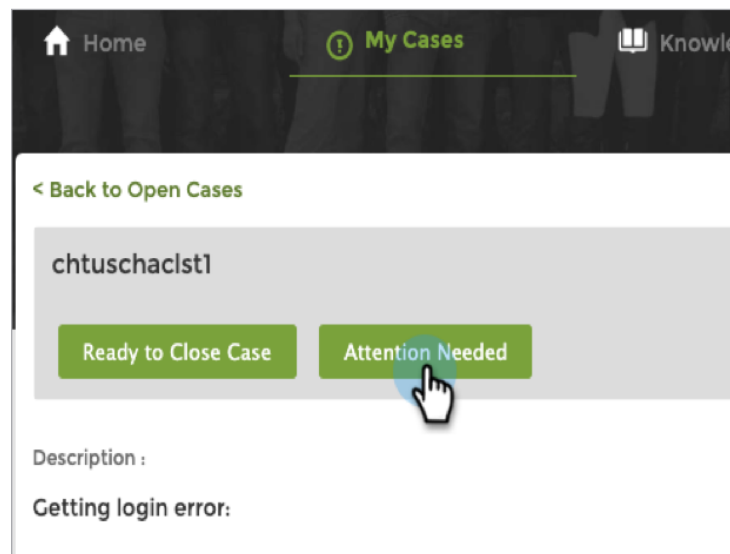
Replacement products and components are shipped to end users, systems integrators, and resellers based on instructions from Cohesity Support. Our products and components that are (A) covered under the terms and conditions of Cohesity's Express Limited Warranty, or (B) covered under a purchased support package, must be pre-authorized for return by Cohesity with an RMA number marked on the outside of the package and packaged appropriately for safe shipment.

If our Support staff determine that a replacement part (or product) is needed, a replacement will be shipped. You (or your designated service provider) will receive a dispatch number that also acts as your RMA number. We pay all freight charges for returned Covered Products or components via a Cohesity-designated carrier. If your support level allows you to keep defective hardware parts, there is no need to return them to us. However, all other defective hardware parts must be returned via our RMA process.

The case SLA resets to the contractual SLA when a case is transferred from Cohesity to the certified hardware partner and from a certified hardware partner to Cohesity.

## Cohesity Case Escalation

You can raise the priority of your case based on business impact at any time. To begin an escalation, open the case that needs to be escalated, click **Attention Needed**, and provide the reason and details for the escalation. If you have Platinum service (check your [asset inventory](#)), you can contact your Cohesity TAM (Technical Account Manager) resource to escalate the case.



If your request is not addressed within a reasonable time, our system automatically notifies our second-line management. All escalation requests notify both the engineer working on your issue as well as our management team.

**Proactive, Automated Techniques to Speed Case Resolution**

We use two solutions with innovative techniques to speed your case resolution: the Cohesity Support Channel and Cohesity Helios Support Automation.

*Cohesity Support Channel*

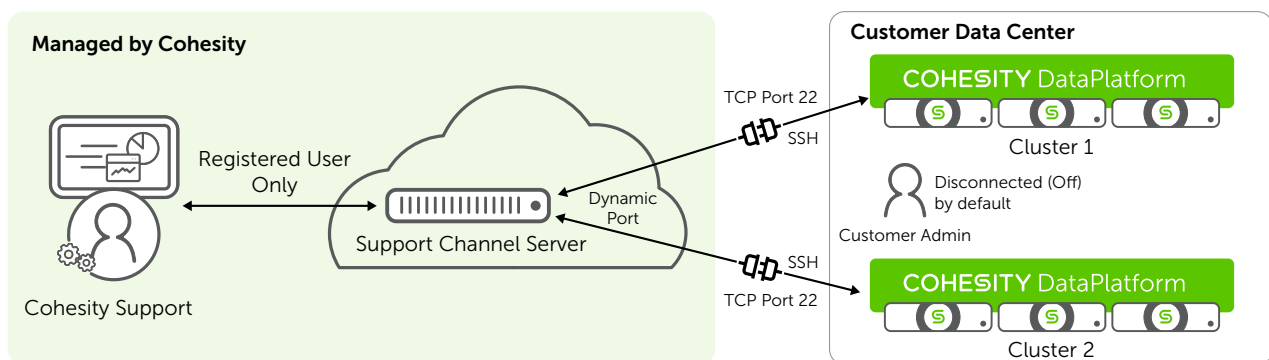
This is a secure, simple, and effective way for our Support Engineers to provide you with on-demand assistance. When the Support Channel is enabled, one of our qualified Support Engineers can log in to your Cohesity cluster to troubleshoot and solve your issue remotely.

Our Support Channel server is located in the public cloud and has a secure login mechanism. The server is configured with a public key and accepts connections only from the Cohesity cluster and authorized Cohesity personnel. The cluster chooses one node as the master node and that node initiates a 2048-bit RSA-encrypted tunnel on TCP port 22 with the server. (Contact Support if you prefer to use another port.) This ensures that all communication is encrypted between the Support team and the cluster. The server configuration is restricted to a limited set of Support Engineers and a strict user registration policy is enforced and audited on a regular basis.

You can turn access off, turn access on, or provide temporary access for a set period of time to provide our Customer Support personnel access when needed for support purposes. Support Channel access is off by default.

Typically, the Support Channel is used by our Support team to download support logs, examine current system settings, and view job progress for problem diagnostics. All Support Channel usage is tracked and logged.

The diagram below illustrates how our Support Channel works.



For instructions on enabling and disabling the Support Channel, see [Manage the Support Channel](#) in the online Help.

### *Cohesity Helios Support Automation*

Cohesity Helios Support Automation is enabled by default to detect issues and help you ensure you meet your business SLAs. To do this, Helios collects metadata from managed clusters for the purpose of monitoring, reporting, and providing interactive management.

Helios collects the following metadata from the cluster:

- Alerts
- Cluster configuration and status
- Firmware information
- Time capsule for troubleshooting (that is, debug logs, Linux command outputs, and custom settings on the cluster)
- Audit logs
- Statistics
- Rest API outputs
- Objects discovered from various sources
- Protection Group and Protection Run details
- Dashboard, users, and groups activity

Cohesity Helios Support Automation works on an opt-out model. It enables a proactive wellness mechanism that auto-generates cases based on predictive alerts, cluster alerts, and bundle logs. For more information, see the [Helios Auto-generated Cases for Proactive Wellness](#) knowledge base article.

Verify that port 443 is open for the following targets:

- eagle.cohesity.com
- helios-data.cohesity.com
- helios.cohesity.com

Helios collects metadata:

- **Daily.** Includes logs for troubleshooting
- **In real time** (every 15 minutes). Includes alerts, cluster configuration, and statistics for the last 15 minutes (but does not include logs)

We retain the raw metadata for only 15 days, but we hold onto the processed metadata required for some use cases, such as capacity prediction and proactive wellness.

Helios does not collect customer data residing on the Cohesity cluster; only the related metadata is collected and analyzed.

### *Metadata Encryption*

Helios encrypts metadata in flight and at rest by default and takes a multilayered approach. Specifically, in flight, the metadata is encrypted using HTTPS over the TLS 1.2 protocol, and at rest, the public cloud infrastructure encrypts the metadata using the AES-256 standard.

Helios leverages the services provided by the cloud platform vendors to manage and encrypt the metadata and keys that are stored at rest in cloud storage services. This ensures that all the metadata that we store are encrypted, secured, and protected from unauthorized access.

### **When Cohesity Closes Your Case**

Once your case—regardless of priority—has been resolved, we mark it closed. When your case is closed, you will automatically receive a satisfaction survey. Please take a few minutes to complete it as it helps us identify areas for improvement and when appropriate, celebrate achievement.

### **Accessing Cohesity Software**

You can use your Cohesity Support portal account login credentials to access the latest [Cohesity software](#). If you are upgrading your Cohesity cluster's software version and it's connected to Helios, you can do it [directly from the Helios portal](#).

If you don't have Support portal credentials, contact your Helios Administrator (see Cohesity Support Portal above).



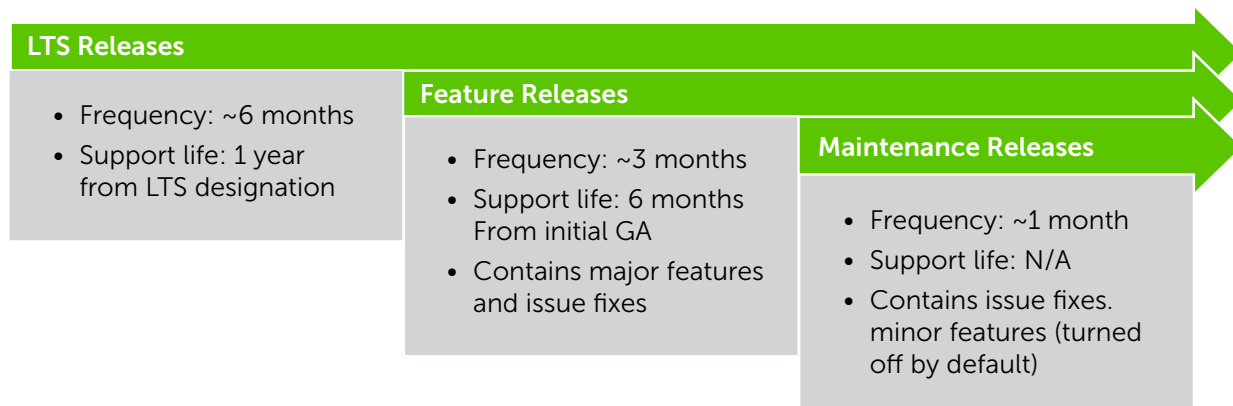
## Our Software Release Lifecycle

We regularly release Cohesity software updates, supporting a variety of capabilities—from new features to fixes.

### Cohesity Software Release Types and Lifecycles:

Type	Description	Lifecycle
<b>LTS Releases (Long Term Support)</b>	These are designated releases that are subsequently updated as needed. LTS releases are suitable for most production environments. Customers who require new features or enhancements can use a Feature Release. LTS releases are supported for at least 1 year from LTS designation date to maintain stability. LTS releases are designated about every 6 months.	<i>LTS Releases</i> are supported for a minimum of 12 months from the date of LTS designation. One or more releases may be designated as an LTS release at any given time. Customers using LTS releases are encouraged to upgrade to the latest LTS Maintenance Release.
<b>Feature Releases</b>	These deliver new features and bug fixes. The numbering format for feature releases follows this pattern: 6.0, 6.1, etc. A feature release family is identified by the x.y release number and its follow-on maintenance releases (described below). Feature Releases are provided about every 3 months and are supported for at least 6 months from initial general availability.	<i>Feature Release</i> families (x.y releases) are supported for a minimum of 6 months from first availability of the Feature Release (GA date). Customers using a given Feature Release are encouraged to upgrade to the latest Maintenance Release when it becomes available.
<b>Maintenance Releases</b>	These deliver fixes to important issues in supported releases. Maintenance Releases are indicated by the third digit or letter in the release number, following this pattern 6.0.1 and 6.0.2a (Maintenance Releases of the 6.0 Feature Release). Maintenance Releases are provided as needed to address issues (about once a month).	<i>Maintenance Releases</i> fix issues. Urgent fixes may be addressed with a patch. A patch solution is always also included in the next practical Maintenance Release, enabling customers with the patch to move away from a patch solution.

### Frequency of Releases:



### End of Support and End of Life Policy

For End of Support (EoS) and End of Life (EoL) dates for each Cohesity software release, see the [Cohesity Products End of Support and End of Life Information](#) guide.

### Read Our Product Documentation

We provide a robust, on-demand and detailed knowledge base, accessible right from the Support portal, and product documentation to support your deployment of Cohesity products and many capabilities.

### Submit Your Ideas And Feedback

Our development teams always appreciate your feedback. Please submit your [ideas](#) for new or enhanced Cohesity capabilities through our Support portal.

### Cohesity Galaxy: Our Customer Community

We're excited to invite you to Cohesity Galaxy, our VIP customer community. It's a great place to get up to speed on our company, network with your peers, and have a little fun along the way!

Join today to:

- Connect with other passionate pros in the industry and bond with Cohesians who care about your success.
- Get first access to events, best practices, product updates, feedback opportunities, and more.
- Earn points for participation, which you can redeem for Cohesity swag, top tech items, and gift cards.

### We can't wait for you to join us in the Cohesity Galaxy!

You'll need a separate login to get started at: <https://galaxy.cohesity.com/join/blastoff>

## Additional Support Services and Resources

**The Cohesity Technical Account Manager (TAM) Support Service** – Our TAM service helps you get the highest possible value from your Cohesity investment. Cohesity TAMs combine deep industry and product knowledge with best-practice insights from global deployments to ensure the immediate and long-term success of our platform in your environment. When you become a TAM customer, you gain access to a named individual who advocates for your needs, coordinates Cohesity resources for your benefit, and helps to quickly resolve your support issues. TAMs work with you and your team to set goals, share feedback, and drive action. They track requested product enhancements and promote roadmap input internally. The TAM service complements your Support plan. [Learn more.](#)

**Cohesity Platinum Service** – Our Platinum Service provides you with priority handling of support cases and account advocacy through direct access to assigned technical experts. Platinum Service customers have the benefit of additional focused attention and single point-of-contact issue resolution from both a Cohesity Designated Support Engineer (DSE) and a Cohesity Technical Account Manager (TAM). As named individuals, your DSE works on your cases as they arise while your TAM continually advocates for your needs, coordinates Cohesity resources for your strategic planning benefit, and helps your organization quickly resolve open support issues. Platinum Service is an extension of Cohesity's Premium Support plan. [Learn more.](#)

**Cohesity Resident Engineer Service** – Our Resident Engineers are uniquely qualified to assist and advise your team, providing data protection services and helping you administer Cohesity DataPlatform. Each Resident is a Cohesity expert and has received comprehensive product training and certifications to help you integrate your workloads for seamless transition and data protection continuity. [Learn more.](#)

**Cohesity Customer Success Program** - Our Customer Success Managers (CSMs) are committed to providing a seamless onboarding experience and process, ensuring you are starting on the right foot. CSMs focus on tooling, reporting, and systems to assist all customers with their success. For specific customers, a CSM may be assigned to guide you on your full Cohesity journey. [Learn more.](#)

**Cohesity DataPlatform Installation Service** – The goal of this service, for Cohesity DataPlatform and qualified Cisco or HPE platforms, is to help you deploy and integrate Cohesity DataPlatform into your environment, quickly and according to best practices. Cohesity DataPlatform Installation by Cohesity Advanced Services accelerates time to value and helps protect your investment. [Learn more.](#)

**Cohesity Quick Start Service** – This service provides VMware, SQL, and Oracle configuration to integrate your workloads and provide data protection services. [Learn more.](#)

## We're Here For You and Your Organization

Our motto is customers first. Communicate. Confer. Collaborate. We're here and ready to assist. Your success matters, so send us feedback, and if you don't find what you're looking for here, contact [Customer Success at Cohesity!](#) We look forward to working with you.