

**COHESITY**

# **Cohesity Global Support and Services Handbook**

**WELCOME GUIDE**

November 2025

## Welcome to the Cohesity family!

Our mission is to protect, secure, and provide insights into the world's data. We want to empower your team to tap into all 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 and services 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 Support and Helios portals to our Cohesity Circle 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 lead the industry in AI-powered data security.

Sincerely,  
Lenny Alugas  
Chief Customer Experience Officer

# Contents

Welcome to the Cohesity family!.....	2	Cohesity NetBackup Appliance Callhome and AutoSupport Service Automation.....	16
Terms and Conditions .....	3	System Health Insights .....	17
Our services and support commitment to you .....	4	Troubleshooting.....	17
Our Support Alliance Program overview .....	5	Case management activities .....	17
Cohesity software support.....	6	Ability to update the priority of the case .....	17
Priority Levels.....	7	Cohesity data protect case escalation .....	18
Premium Service.....	7	When Cohesity closes your case.....	18
Cohesity Customer Success Services Gold .....	7	Third-party problems .....	18
Cohesity Customer Success Services Platinum.....	7	Cohesity Academy .....	18
Cohesity hardware support .....	8	Cohesity product documentation.....	19
Cohesity cases involving hardware.....	8	Cohesity Circle: Our customer community .....	19
Product life cycle .....	8	Cohesity Partner Portal.....	19
NetBackup Extended Appliance Support (EAS).....	9	CERT FAQ .....	20
NetBackup Appliances Support Services .....	9	What is CERT?.....	20
Cohesity Certified Platforms.....	9	What is the entrance criteria for CERT?.....	20
SaaS, Subscriptions, and Hosted Services .....	9	How do I alert the CERT team?.....	20
U.S. Citizen Customer Support Services.....	9	What can customers expect during a CERT activation?.....	20
Contact our support team .....	10	Who handles customer communication during a CERT engagement? .....	20
MyCohesity: All in one place .....	11	Is CERT service available 24x7?.....	20
Getting started as a new user .....	11	When does a CERT engagement conclude? .....	20
Create a new support case .....	12	CERT escalation customer guide: .....	21
Proactive, automated techniques to speed case resolution .....	13	Enhanced support services and resources .....	22
Cohesity support channel.....	14		
Cohesity Helios Support Automation .....	15		
Metadata encryption.....	16		

## 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 any applicable agreement between Customer and Cohesity. Terms used in this Handbook and not defined shall have the meanings ascribed to them in the Cohesity Technical Support Policy, located at [Cohesity.com/agreements](https://cohesity.com/agreements).

## Our services and support commitment to you

The Cohesity technical team provides 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 hardware, 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
- Self-Serve capabilities on Cohesity's Support Portal using cutting edge gen-ai capabilities using CoVA bot/ AI search.

## Our Support Alliance Program overview

Support alliance relationships enable cooperative collaboration across our Platform, providing interoperability and joint solution creation. The ecosystem of these partnerships includes OEM, Alliance, and 3rd-Party Applications/ISVs. Interlocking with these partners is paramount to providing a positive customer experience.

Support alliance relationships enable cooperative collaboration across our Platform, providing interoperability and joint solution creation. The ecosystem of these partnerships includes OEM, Alliance, and 3rd-Party Applications/ISVs. Interlocking with these partners is paramount to providing a positive customer experience. Cohesity support and services professionals work in combination with our Support Alliance partner technical support teams to address your questions, troubleshoot, 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> , responding to automaion case email for further troubleshooting, 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> <li>Pure Storage</li> <li>Intel</li> <li>Lenovo</li> </ul>	<p>For software issues, open a case with Cohesity.</p> <p>Cohesity advises following the published field replacement guides for hardware issues, and Cohesity Support is available to review a suspected hardware issue.</p> <p>If a hardware case needs to be opened with a Certified Partner, please open the case directly with that Partner and share the Partner case number with your Cohesity Technical Support Engineer. This will assist with three-way collaboration and troubleshooting, as needed.</p> <p>Hardware replacements must be requested directly from the hardware Partner. You can reference the Cohesity Case number to assist in log collection and troubleshooting, as needed</p> <p>Cohesity Support is available to assist you and the hardware Partner during the replacement process.</p> <p>If you are unsure where to open a case, the Cohesity Support team is trained on partners' solutions and can help guide you.</p>
Third-party applications (Marketplace Apps) running on the Cohesity platform	<p>Installation issues - contact Cohesity Support.</p> <p>Application issues - contact the application vendor.</p> <p>Cohesity support is available to assist. Please provide the third-party vendor case number to your Cohesity Technical Support Engineer to assist in 3-way collaboration and troubleshooting, as needed.</p>

## Cohesity software support

The Cohesity technical team provides your organization with complete, responsive, high-quality services, boosting your experiences with Cohesity products and services. The following table illustrates Cohesity's internal objectives to respond to applicable Priority Levels.

Service Deliverable	Technical Support	Customer Success	
	Premium	Gold	Platinum
Self-help	Cohesity Support Portal - Cohesity Virtual Assistant (CoVA)	Cohesity Support Portal - Cohesity Virtual Assistant (CoVA)	Cohesity Support Portal - Cohesity Virtual Assistant (CoVA) with Subject Matter Expert Handoff
Case Submission (web, phone)	✓	✓	✓
Proactive Automation Cases	Cohesity Monitoring Services (CMS), Support Bot, and Call Home Services (CHS)	Cohesity Monitoring Services (CMS), Support Bot, and Call Home Services (CHS)	Cohesity Monitoring Services (CMS), Support Bot, and Call Home Services (CHS)
Premium Queue			Priority 1,2,3 cases
Initial Response Time (IRT) Internal Objective**	Priority 1: 1 hour Priority 2: 2 hours Priority 3: 4 hours	Priority 1: 30 minutes Priority 2: 2 hours Priority 3: 4 hours	Priority 1: 30 minutes Priority 2: 1 hours Priority 3: 4 hours
Support Case Assignment	Pooled	Pooled	P1-3 Cases assigned to Designated Technical Support Engineer (DTSE) during Business hours*. Priority Queue (24x5) Critical Support (P1-2) over Weekend and Holidays
Support Case Status Updates**	Priority 1: at least once daily Priority 2: at least once every 2 business days Priority 3: at least once every 3 business days	Priority 1: at least once daily Priority 2: at least once every 2 business days Priority 3: at least once every 3 business days	Priority 1: at least every 2 hours Priority 2: at least once every business day Priority 3: at least once every 3 business days

\* Business hours are defined as 8:00AM to 5:00PM local time and excludes weekends and public holidays. Local time is defined by the country and time zone of the SFDC contact. If this information isn't available, mailing address at the customer level is used unless otherwise specified at the time of product activation.

\*\*Cohesity's internal objective using best efforts.

**Terms and Conditions** The above is informational only. Terms applicable to Cohesity support are available at [cohesity.com/agreements](https://cohesity.com/agreements)

## Priority Levels

Customers should set an initial Priority Level based on the system impact.

Priority 1	Priority 2	Priority 3	Priority 4
System down: an event that is severely impacting the critical functionality of the Cohesity product in a production environment.	Significant system impact: an event impacting features of restricting use of the Cohesity product in a production environment.	Minor system impact: an event or state in the Cohesity environment that requires investigation, but core functionality is available.	Non-operational system impact: an event with minor system impact, or a request for information or questions about functionality.

## Premium Service

Our Premium Service provides around-the-clock, global technical assistance to help organizations simplify and optimize their data management across data centers, edge, and cloud. It supports key services like backup, disaster recovery, compliance, and analytics through a proactive, customer-centric approach. With 24/7/365 availability, fast response times, and access to the latest software updates, the service is designed to reduce IT complexity and prevent issues before they impact operations. Integrated with the Cohesity Helios™ platform for centralized visibility and intelligent alerting, Premium Support is backed by an award-winning team committed to delivering exceptional service and customer satisfaction.

## Cohesity Customer Success Services Gold

Cohesity Customer Success Services Gold provides the support, guidance, and structure needed to adopt and expand with Cohesity. It includes a designated Technical Account Manager (TAM) to help align your success with your business objectives and proactive account oversight. You'll also have access to expert Customer Success Engineers (CSEs) for up to 15 days annually to help with complex technical challenges, along with customizable services from our Customer Success Services Catalog. Additionally, you'll gain full access to training resources, including self-paced eCourses and up to 12 days of instructor-led online training, enabling your team to maximize their Cohesity investment.

For additional details, please see the [Cohesity Customer Success Gold data sheet](#).

## Cohesity Customer Success Services Platinum

Our Platinum package is designed for organizations with complex environments, mission-critical workloads, and a need for extensive technical and strategic alignment. This premium service provides a fully integrated experience combining customer success and support resources with advanced services and hands-on partnership. It includes a Technical Account Manager (TAM) and a Designated Technical Support Engineer (DTSE), all focused on your strategic needs. Achieve peace of mind through consistent engagement to proactively identify risks, monitor progress, and keep your success plan on track. You'll also have access to expert Customer Success Engineers (CSEs) for up to 20 days annually to help with complex technical challenges, along with customizable services from our Customer Success Services Catalog. Additionally, you'll have full access to training resources, including self-paced eCourses and up to 24 days of instructor-led online training to help your team optimize their Cohesity deployment.

For additional details, please see the [Cohesity Customer Success Platinum data sheet](#).

## 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:

Support Premium Offers	Parts Deliver Time	Hardware Support Details
Onsite Support 4 hours	Target for initial onsite response = 4 hours*	<ul style="list-style-type: none"> <li>Onsite support service to assist with Hardware problems, provided at the location registered with Cohesity.</li> <li>After Cohesity Support determines that an onsite response is needed, initial response for onsite support service, including applicable parts, in the targeted timeframe.</li> <li>Timing is impacted by shipment cut-off times and location of the Cohesity Platform as it relates to the applicable Cohesity service location.</li> </ul>
Onsite Support Next Business Day (NBD)	Target for initial onsite response = next business day local business hours*	

\* Additional shipment time may be required where the full enclosure or frame of a Cohesity Platform requires replacement. If applicable, local business hours are determined by the operating hours of the applicable Cohesity service location. In some areas, working hours are defined and limited by local government regulations and restrictions. Relocation of a Cohesity Platform may impact Cohesity's ability to provide Onsite Support. 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](#).

**Add-On Services** (may be added for an additional fee):

- Hardware Non-Return Options
- Disk Non-Return Options

## 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.

## Product life cycle

Cohesity provides different levels of deliverables under a customer's Support Agreement depending on where their Product is in its life cycle. Our Product Life Cycle describes the typical life cycle for our products, and the related support deliverables during those life cycle stages. For more information, please refer to our [Legacy Veritas Product Life Cycle](#) and [Cohesity Products End of Support and End of Life Information](#).



## NetBackup Extended Appliance Support (EAS)

If you have an active support agreement and want to continue support for your Cohesity NetBackup Platform after its End of Sustaining Support date (if applicable), you must purchase EAS, if available. EAS is subject to parts availability and is not applicable for certain Cohesity NetBackup™ Platforms, excluding NetBackup Flex Scale and Data Protect.

## NetBackup Appliances Support Services

NetBackup Appliance Support Services describes the support services for NetBackup appliances. Cohesity delivers support for NetBackup appliances to customers in accordance with the Support Terms to customers that are using the appliance in a Supported Configuration. Additional information is available on our Cohesity [Backup Appliance](#) page.

For more details on NetBackup Flex Scale validated Appliances refer to the following documents:

- [NetBackup Flex Scale Support FAQ](#)
- [NetBackup™ Flex Scale Support](#)

## Cohesity Certified Platforms

Cohesity Certified Platforms confidently run Cohesity software in your data center, in the cloud, or at the edge with certified solutions from Cohesity and our partners. Hardware Provider confirms and validates the hardware's interoperability with the Cohesity data protection software product. Support for the certified hardware solution is provided by the Hardware Provider. At the same time, customers have the option to purchase hardware by selecting from a list of pre-qualified industry standard hardware. [Certified Platforms](#) | [Solutions from Cohesity and Partners](#)

## SaaS, Subscriptions, and Hosted Services

Software as a Service (SaaS), subscriptions, and hosted services are defined and described in their respective service and licensing agreements, available on our [Service and License Agreements](#) page.

## U.S. Citizen Customer Support Services

Customers may purchase support routing to U.S. Citizens located on U.S. Soil. U.S. Citizen on U.S. Soil support is available for P1-P4 support issues during U.S. business hours (6AM to 12AM US EST). Outside of US business hours, coverage is limited to P1 and P2 issues. The service period is aligned with the service period of the software support specified in the relevant Order. For assistance, please contact our dedicated support lines:

**Cohesity Support (US Citizen only):** 1-202-470-1821

## Contact our support team

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

### Support portal

Cohesity provides 24/7 self-help resources at no extra cost. Customers with active Support Agreements can manage support cases through the [Support Portal Website](#).

Visit the Cohesity Support Portal to explore all our resources and programs. From there you can:

- Create and manage existing cases using CoVA/ Web Form.
- Access and download software updates.
- Resolve your queries independently by leveraging product documentation, knowledge base articles, and how-to videos, all accessible through the Gen-AI powered CoVA bot.

### Telephone support

A list of worldwide Cohesity Support Solutions contact numbers is available on our [Cohesity Support page](#). Cohesity offers toll-free phone support in certain areas, but customers are responsible for all other charges they incur, such as faxes, toll calls, internet services, network bandwidth, cloud consumption, postage, and postage insurance.

### Local language support

Cohesity provides support services in English. We will use commercially reasonable efforts to provide non- English language support during Regional Business Hours, subject to Cohesity available resources. In some cases, Cohesity may utilize third-party translation services to facilitate communication in non-English languages.

### NetBackup/ NetBackup Appliances: Registering or updating entitlement management system (VEMS) contacts

Depending on the permission level, VEMS users may be able to generate license keys for the Entitlements owned by their organization. Please review [VEMS Self-Service](#) for information on VEMS self-service contact management.

## MyCohesity: All in one place

MyCohesity gives you a single account and password to seamlessly access and manage all your Cohesity resources—no more juggling multiple logins, URLs, or credentials. With a centralized experience, you can easily navigate between:

- **Helios**
- **Support Portal**
- **Academy**
- **Product Documentation**
- **Cohesity Circle**
- **Partner Portal**
- **NetInsights Console**
- **Download Portal**
- **Download Software**

Our goal is to make your experience faster and more efficient, helping you stay engaged and connected across all Cohesity services.

### Getting started as a new user

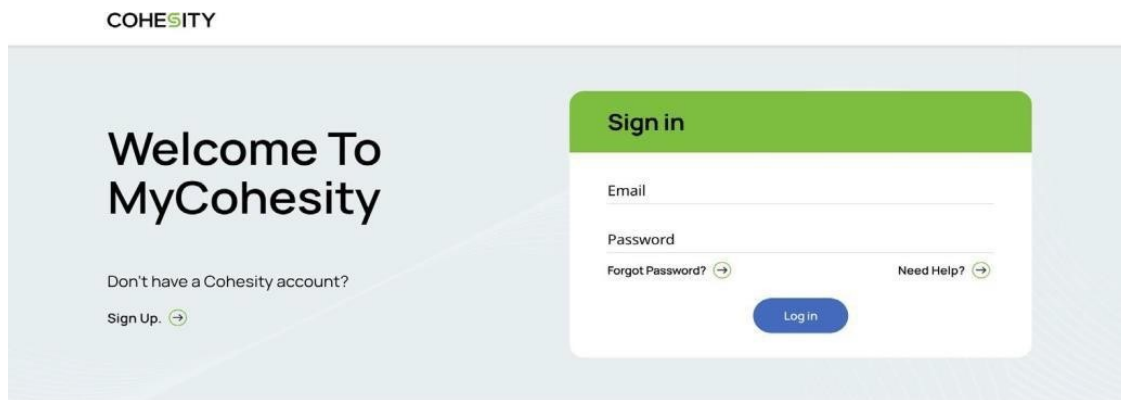
If you're new to Cohesity, simply sign up for a **MyCohesity** account (click the **Sign Up** link at the top-left as shown in the image below). After signing up, you'll receive a welcome email with your username and an activation link to set your password.

Once logged in, you'll have access to all MyCohesity services—except Helios. To gain Helios access:

1. Click **Launch** from the Helios tile.
2. On the next screen, click **Request Access**.
3. This will notify your Helios Administrator, who can then grant you access.
4. The first user in your organization to sign up will automatically be granted Helios Admin rights.

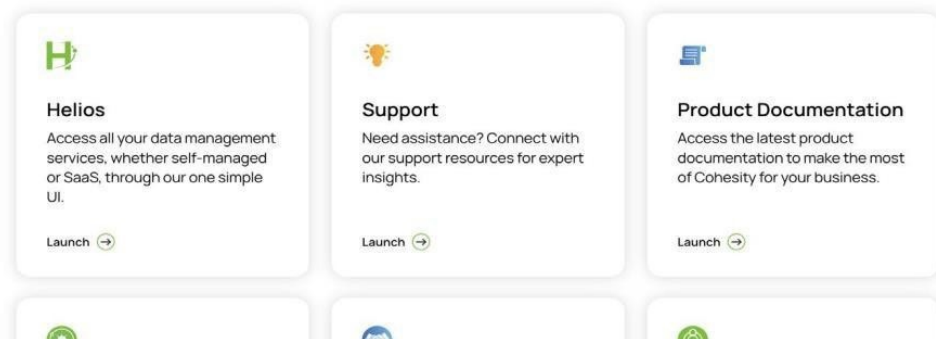
#### Alternatively...

If you prefer not to sign up yourself, your Helios Administrator can create your account directly by adding you as a user (refer to the **Manage Users** documentation). You'll receive an email invitation to activate your account and gain immediate access to all MyCohesity services—including Helios.



## Everything Cohesity. All in one place

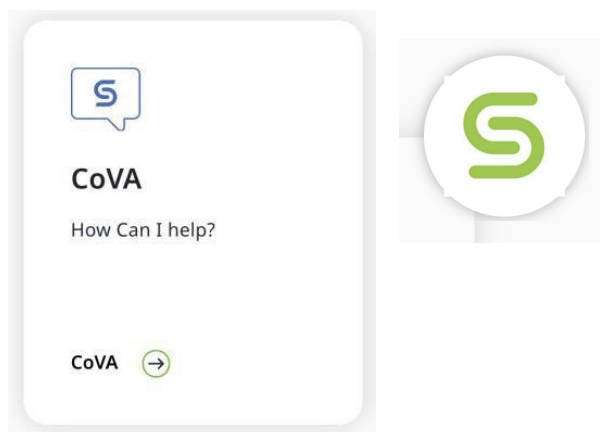
Discover all that Cohesity has to offer with one easy to access portal for all resources.



## Create a new support case

**CoVA AI** is our gen-AI powered virtual assistant. If you are unable to resolve an issue yourself by using the CoVA bot, you can leverage it to create a case. To create a case using CoVA-AI:

1. Click on the **CoVA-AI** tile on the homepage or click the **Cohesity** icon in the bottom-left corner of the screen.



2. Converse with the bot about the issue you are facing. Type in **Create a case** or **Open a case**. This creates a pre-populated case form that can be filled out as needed.
3. Choose appropriate categories for the case.
4. Provide relevant details:

**Create a New Case**

I need assistance or have an issue with\*

Cohesity Cluster

Subcategory\*

Cluster/Agent Upgrade

Subject \*

upgrade a cluster

Description \*

upgrade a cluster

Alert ID/Error String ⓘ

Alert ID/Error String

Priority\* ⓘ

P3

☐ I have a non-cluster specific/general query?

Cluster ID \*

Select an Item

**Submit**

5. Once done, click **Submit**.
6. This will create the required case.

## 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.

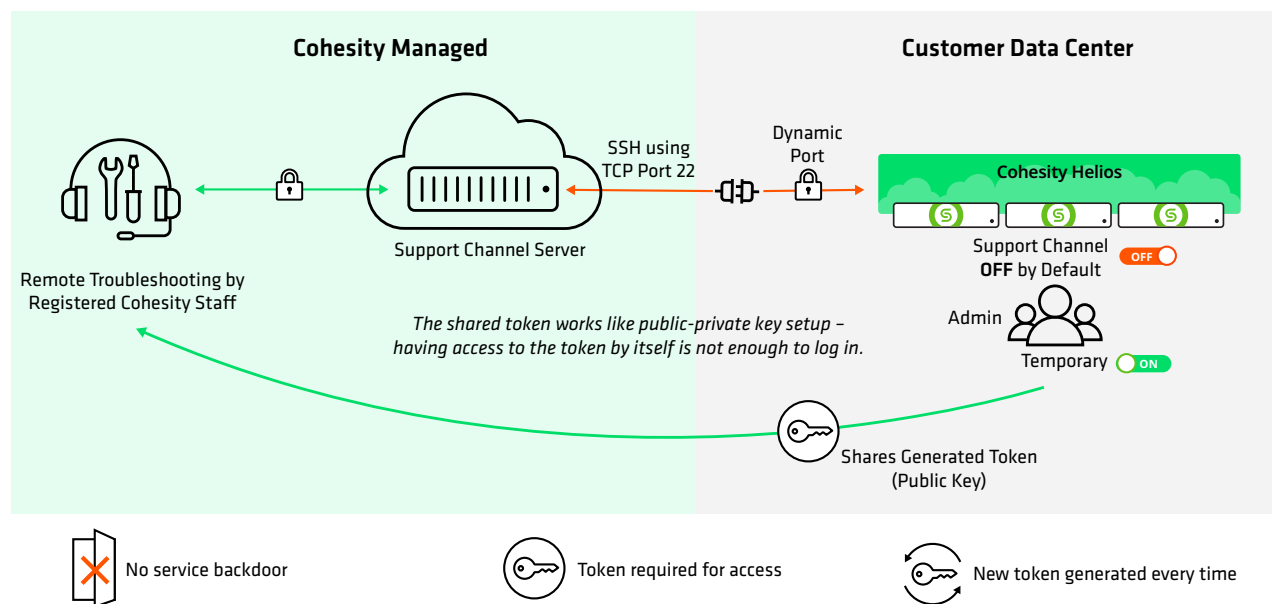
Our Support Channel server is in the public cloud and has a secure login mechanism. The server is configured with a public key and accepts connections only from the Cohesity cluster and authorized Cohesity personnel. The cluster chooses one node as the master node and that node initiates a 2048-bit RSA-encrypted 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 to provide our Customer Support personnel with access when needed for support purposes. Support Channel access is 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

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:

- 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.

## Cohesity NetBackup Appliance Callhome and AutoSupport Service Automation

When callhome is enabled on Cohesity NetBackup appliance, the appliance can connect with Cohesity AutoSupport server and upload appliance hardware information. The AutoSupport infrastructure within Cohesity analyzes the Call Home data from each appliance to provide proactive customer support and incident response for hardware failures. This reduces the need for an administrator to initiate support cases. There is a dedicated Call Home Services (CHS) team to provide first-line global incident response and 24-hour monitoring. A CHS engineer triages the incident and determines the course of action. The CHS engineer then escalates the issue to Support Operations or dispatches a hardware repair order to Field Services. AutoSupport correlates the Call Home data with other site configuration data held by Cohesity, for technical support and error analysis. For more information, see [Appliance AutoSupport Reference Guide](#).

Appliance callhome is an Opt-In feature and disabled by default. The AutoSupport Client Agent transmits data on a routine basis to provide proactive monitoring and advanced diagnostics for support purposes. The frequency depends on the type of data transmitted and can be real-time, every 15 minutes, every day or every 3 days. These data collections and transmissions are classified into 5 primary categories:

- Event data
- Configuration and Inventory data
- Telemetry and Performance data
- Diagnostic data
- DataCollect logs

The appliance uses the HTTPS protocol and uses port 443 to connect to the AutoSupport server. For more information, see [Appliance callhome endpoints](#).

**We retain the raw telemetry metadata for 18 months and DataCollect logs for 12 months.**

AutoSupport Client does not collect customer data residing on the Cohesity Netbackup appliance; only the hardware information and software metadata is collected and analyzed.



## System Health Insights

System Health Insights is SaaS-based platform that enables you to manage and monitor the health and operational state of your appliances and receive targeted recommendations to maintain maximum reliability and uptime. It uses artificial intelligence and machine learning to analyze the Call Home data and suggest improvements. It also offers, self-service option for key generation via Secure Quorum to unlock your appliance. Alternatively, you can get assistance from Cohesity Technical Support via a support case. For more information, refer to [System Health Insights User Guide](#). Onboarding onto System Health Insights portal, is done by the process of registration, which lets users define who can access the appliances. Registration also provides Cohesity with accurate contact details and site-specific information, which aids in expediting support, field services, and customer notification of failures.

## Troubleshooting

The Technical Support Engineer (TSE) will ask the customer questions about their Problem, and work with them to isolate the cause of their Problem. The troubleshooting process may involve answering additional questions, running diagnostics, applying patches, requesting logs, providing remote access, and more. Please note that Cohesity will require the customer's express consent prior to starting any remote access. In the event that Cohesity requests logs, and customer agrees to provide logs to assist with troubleshooting a reported Case,

Cohesity will safeguard customers' personal data in accordance with the 'Customer Information' section in this handbook. The TSE will document all troubleshooting steps in the Case. The TSE will provide the customer with a plan of action (POA) throughout the life of the Case. The actions taken by the assigned TSE will work to determine the cause of your Problem. If the cause of your Problem is identified to be an issue with Cohesity Software, the TSE will deliver a Workaround or other resolution or may also develop a plan of action outlining expected steps toward addressing the Problem. Customers may view Case updates and communicate with the TSE through the [Cohesity Support website](#).

For Veritas Appliances, if the determination is made during problem diagnosis that an Appliance hardware issue exists, a field service coordinator will work with the customer to coordinate an estimated time of arrival of the on-site support personnel and/or part needed. This will be done within the Support Agreement at times as appropriate, or as otherwise agreed with the customer. Third-party hardware issues will be deferred to the vendor.

For Hardware issues with a Cohesity product, raise a support case to troubleshoot and arrange a replacement if needed. Please refer to the Cohesity Cases Involving Hardware section of this Handbook for more information.

## Case management activities

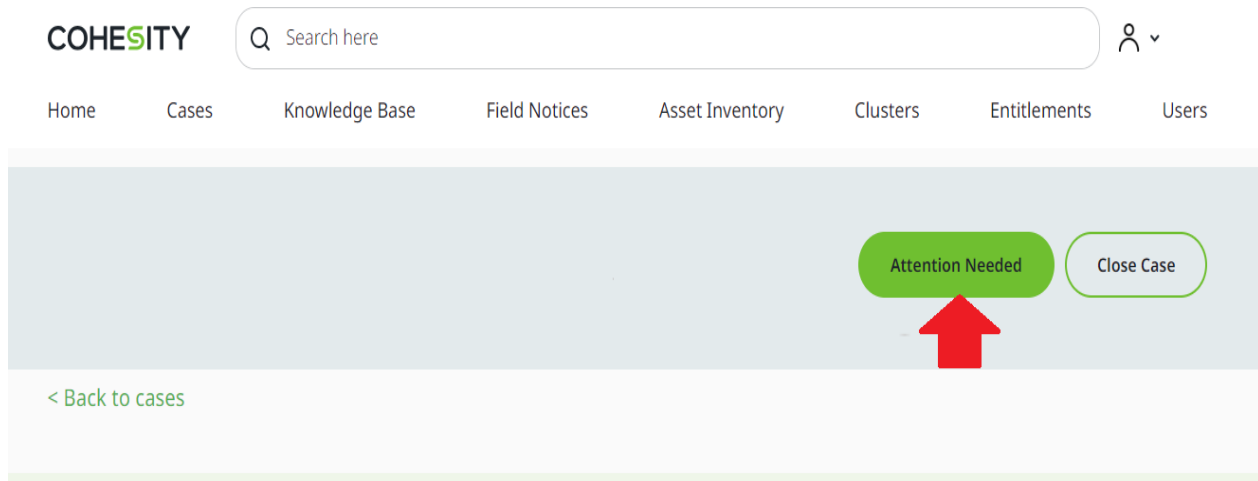
Cohesity will use commercially reasonable efforts to carry out related activities within targeted timeframes. However, Cohesity has no obligation to meet any specific timeframes. If a customer has logged a Priority 1 Problem, the initial efforts of Cohesity will focus on making the customer's Software operational. There may be temporary degradation in performance while Cohesity continues to work to resolve the Problem.

## Ability to update the priority of the case

You will be responsible for setting the initial Priority Level for your Problem based on the Priority Level definitions in the Handbook. If the seriousness of your Problem changes, you can adjust the Priority Level. Cohesity will make the final determination as to the Priority Level for any particular Problem.

## Cohesity data protect 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 a Customer Success Platinum or Gold service (check your [asset inventory](#)), you can contact your Cohesity CSM (Customer Success Manager) resource to escalate the case.



If your request is not addressed within our Initial Response Time (IRT), 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.

## 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.

## Third-party problems

Cohesity will use commercially reasonable efforts to bring a final resolution to the customer's Problem. However, in the event that the troubleshooting process and evidence demonstrate that the Problem is not caused by Cohesity, but appears to be caused by a third-party, Cohesity will request—and in some cases require—the customer to open a Case with that third-party to address the Problem.

## Cohesity Academy

Cohesity Academy provides comprehensive training, education, and certification programs designed to meet the unique needs of both individuals and organizations. Our offerings include self-paced interactive courses, virtual instructor-led sessions, and dedicated team-based training delivered by certified instructors.

Our certification paths enable technical professionals to validate their expertise in data management—from foundational knowledge to advanced, real-world application of complex concepts and tasks.

To explore the full catalog of eLearning modules and instructor-led, lab-based courses, visit: [Cohesity Academy](#).

## Cohesity product documentation

[Cohesity Product Documentation](#) provides you access to the latest product documentation to support your deployment of Cohesity products including technical guides and third-party software support matrix for Cohesity Data Protection. You can also access [Cohesity Developer Portal](#) for APIs documentation, learn how to build an App, and browse several samples.

Legacy Veritas [SORT Documents, Manual, Guides, Download and Veritas Products](#) | [Veritas](#)

## Cohesity Circle: Our customer community

We're excited to invite you to Cohesity Circle, our exclusive online customer community and loyalty program. By joining today, you can:

- Learn from your peers: Share experiences and gain insights.
- Get rewarded: Earn points for your contributions, which are redeemable for rewards.
- Advance your knowledge: Dive into a wealth of high-quality content and training to boost your professional growth and brand.

**We can't wait for you to join us in the Cohesity Circle!**

## Cohesity Partner Portal

Cohesity is 100% focused with a commitment to building relationships that offer value both to our partners and their customers. We continue to strengthen our ecosystem with a robust set of solution providers, global system integrators (GSI), service providers, and distributors.

## CERT FAQ

### What is CERT?

The Cyber Event Response Team (CERT) is a specialized team of Cyber Security Incident Response experts. They are specifically trained to help customers navigate and respond to ransomware or other cyber incidents.

### What is the entrance criteria for CERT?

Customers are eligible for CERT engagement if they are impacted, being impacted, or suspect they have been impacted by a cyber threat or ransomware group. All Cohesity customers have access to the Cyber Event Response Team.

### How do I alert the CERT team?

To alert CERT, follow these steps:

1. Open a Support case and the Security Analyst team is notified that the customer is facing a cyber event.
2. The Security Analyst, Support Manager, or Sales team will then initiate an internal CERT Activation, triggering a PagerDuty notification to the Escalation Team for immediate engagement.

### What can customers expect during a CERT activation?

CERT Activation triggers a customer-centric engagement. Using Cohesity's Follow the Sun model, the response is managed by subject matter experts (SMEs) from Global Escalations, Support, Services, and Engineering. Communications are limited to essential personnel to maintain confidentiality.

### Who handles customer communication during a CERT engagement?

The Escalation Leader is responsible for managing and owning all communications with the customer during the engagement.

### Is CERT service available 24x7?

Yes, the CERT team operates 24/7 to support customers during cyber events. SLG's are 20 minutes to engage from the time an activation occurs.

### When does a CERT engagement conclude?

A CERT engagement typically involves the following phases on the Cohesity systems:

1. **Freezing the backup environment:** Isolating affected systems to prevent further damage.
2. **Investigation/Forensic review:** Conducting a thorough investigation to identify the source and impact of the incident.
3. **Unfreezing the environment:** Reverting systems back to operational status.
4. **Resuming normal operations:** Enabling the cluster and infrastructure to return to normal functionality.

## CERT escalation customer guide:

Cohesity's Cyber Event Response Team (CERT) assists customers that have detected a cyber security event. Cohesity's CERT Team is committed to assisting you if you suspect ransomware activity.

To help manage expectations and streamline our response, please refer to the following guidelines during a CERT case:

### Key actions we will take

1. **Lock Down the Cluster:** The CERT Security Analyst will initiate security measures, including resetting passwords and implementing best practices to secure your cluster.
2. **Freeze the Cluster:** The CERT Security Analyst will freeze the environment to prevent any deletions during the investigation.
3. **Audit the Cluster:** Cohesity's CERT Team will review the web UI and gather all logs to confirm any potential threats to your Cohesity cluster.
4. **Unfreeze the Cluster:** Once you are confident that all recoverable data has been restored, the CERT Security Analyst will unfreeze the environment.

### Important notes:

- **Scope of the CERT Case:** If your issue falls outside of the four defined areas above, please understand that the CERT case may not be appropriate. For concerns related to backups and restores, we will create a new case labeled **CPR (CERT Post Recovery)** - <description of the issue seen> to track that work separately. This approach ensures that the CERT Security Analyst can focus on security-related tasks.
- New cases should be created for issues outside of the original CERT case.
- **Rebuilding Clusters:** If a cluster requires rebuilding, Cohesity Security Analyst will provide the necessary documentation and software to guide you through the deployment process. In the event of any issues during this process, the Security Analyst will promptly open a new Priority 1 (P1) case to assist you.
- It's important to note that while Cohesity Support can provide comprehensive documentation to help you perform the rebuild independently, they cannot carry out the rebuild on your behalf.
- For hands-on assistance with recoveries and restores, you can leverage a paid for Professional Services offering, which provides expert support tailored to your needs.
- **IR responsibilities:** Customers should engage their 3rd party Incident Response company for assistance.
- Cohesity has active partnerships with the following Incident Response Companies if a recommendation is needed.
  - Sophos
  - Fenix24
  - Arctic Wolf
  - Semperis
  - Mandiant
  - Unit 42

## Enhanced support services and resources

**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 Helios. 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 Installation Service:** The goal of this service is to provide rapid installation and configuration expertise for organizations adopting our Cohesity Helios® multicloud data platform, on premises or from the cloud. Our Advanced Services team accelerates your 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.](#)

**Cohesity Professional Services:** Our experts have unique knowledge and experience within the industry and with our Cohesity products. They are proficiently adept to help take your organization through the information management journey. Most importantly, their key objectives are to help your organization achieve business outcomes that matter, including: information insight and availability, strategic storage options, hybrid environments, business continuity, risk avoidance and more. [Support Enhanced Services.](#)