



# **Setting up protection relationships in Unified Manager**

Active IQ Unified Manager 9.8

NetApp  
April 16, 2024

This PDF was generated from <https://docs.netapp.com/us-en/active-iq-unified-manager-98/data-protection/task-configuring-a-connection-between-workflow-automation-and-unified-manager.html> on April 16, 2024. Always check docs.netapp.com for the latest.

# Table of Contents

- Setting up protection relationships in Unified Manager ..... 1
  - Before you begin ..... 1
  - Steps ..... 1
  - Configuring a connection between Workflow Automation and Unified Manager ..... 1
  - Verifying Unified Manager data source caching in Workflow Automation ..... 2
  - What happens when OnCommand Workflow Automation is reinstalled or upgraded ..... 3
  - Removing OnCommand Workflow Automation setup from Unified Manager ..... 3

# Setting up protection relationships in Unified Manager

There are several steps that you must perform to use Unified Manager and OnCommand Workflow Automation to set up SnapMirror and SnapVault relationships to protect your data.

## Before you begin

- You must have the Application Administrator or Storage Administrator role.
- You must have established peer relationships between two clusters or two storage virtual machines (SVMs).
- OnCommand Workflow Automation must be integrated with Unified Manager:
  - [Set up OnCommand Workflow Automation](#)
  - [Verifying Unified Manager data source caching in Workflow Automation](#)

## Steps

1. Depending on the type of protection relationship you want to create, do one of the following:
  - [Create a SnapMirror protection relationship.](#)
  - [Create a SnapVault protection relationship.](#)
2. If you want to create a policy for the relationship, depending on the relationship type you are creating, do one of the following:
  - [Create a SnapVault policy.](#)
  - [Create a SnapMirror policy.](#)
3. [Create a SnapMirror or SnapVault schedule.](#)

## Configuring a connection between Workflow Automation and Unified Manager

You can configure a secure connection between OnCommand Workflow Automation (WFA) and Unified Manager. Connecting to Workflow Automation enables you to use protection features such as SnapMirror and SnapVault configuration workflows, as well as commands for managing SnapMirror relationships.

### Before you begin

- The installed version of Workflow Automation must be 5.1 or greater.



The “WFA pack for managing Clustered Data ONTAP” is included in WFA 5.1 so there is no need to download this pack from the NetAppStorage Automation Store and install it separately onto your WFA server as was required in the past. [WFA pack for managing ONTAP](#)

- You must have the name of the database user that you created in Unified Manager to support WFA and Unified Manager connections.

This database user must have been assigned the Integration Schema user role.

- You must be assigned either the Administrator role or the Architect role in Workflow Automation.
- You must have the host address, port number 443, user name, and password for the Workflow Automation setup.
- You must have the Application Administrator or Storage Administrator role.

## Steps

1. In the left navigation pane, click **General > Workflow Automation**.
2. In the **Database User** area of the **Workflow Automation** page, select the name, and enter the password for the database user that you created to support Unified Manager and Workflow Automation connections.
3. In the **Workflow Automation Credentials** area of the page, enter the host name or IP address (IPv4 or IPv6), and the user name and password for the Workflow Automation setup.

You must use the Unified Manager server port (port 443).

4. Click **Save**.
5. If you use a self-signed certificate, click **Yes** to authorize the security certificate.

The Workflow Automation page displays.

6. Click **Yes** to reload the web UI, and add the Workflow Automation features.

## Related information

[NetApp Documentation: OnCommand Workflow Automation \(current releases\)](#)

# Verifying Unified Manager data source caching in Workflow Automation

You can determine whether Unified Manager data source caching is working correctly by checking if data source acquisition is successful in Workflow Automation. You might do this when you integrate Workflow Automation with Unified Manager to ensure that Workflow Automation functionality is available after the integration.

## Before you begin

You must be assigned either the Administrator role or the Architect role in Workflow Automation to perform this task.

## Steps

1. From the Workflow Automation UI, select **Execution > Data Sources**.
2. Right-click the name of the Unified Manager data source, and then select **Acquire Now**.
3. Verify that the acquisition succeeds without errors.

Acquisition errors must be resolved for Workflow Automation integration with Unified Manager to succeed.

## What happens when OnCommand Workflow Automation is reinstalled or upgraded

Before reinstalling or upgrading OnCommand Workflow Automation, you must first remove the connection between OnCommand Workflow Automation and Unified Manager, and ensure that all OnCommand Workflow Automation currently running or scheduled jobs are stopped.

You must also manually delete Unified Manager from OnCommand Workflow Automation.

After you reinstall or upgrade OnCommand Workflow Automation, you must set up the connection with Unified Manager again.

## Removing OnCommand Workflow Automation setup from Unified Manager

You can remove the OnCommand Workflow Automation setup from Unified Manager when you no longer want to use Workflow Automation.

### Before you begin

You must have the Application Administrator or Storage Administrator role.

### Steps

1. In the left navigation pane, click **General > Workflow Automation** in the left Setup menu.
2. In the **Workflow Automation** page, click **Remove Setup**.

## Copyright information

Copyright © 2024 NetApp, Inc. All Rights Reserved. Printed in the U.S. No part of this document covered by copyright may be reproduced in any form or by any means—graphic, electronic, or mechanical, including photocopying, recording, taping, or storage in an electronic retrieval system—without prior written permission of the copyright owner.

Software derived from copyrighted NetApp material is subject to the following license and disclaimer:

THIS SOFTWARE IS PROVIDED BY NETAPP “AS IS” AND WITHOUT ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE, WHICH ARE HEREBY DISCLAIMED. IN NO EVENT SHALL NETAPP BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

NetApp reserves the right to change any products described herein at any time, and without notice. NetApp assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by NetApp. The use or purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of NetApp.

The product described in this manual may be protected by one or more U.S. patents, foreign patents, or pending applications.

LIMITED RIGHTS LEGEND: Use, duplication, or disclosure by the government is subject to restrictions as set forth in subparagraph (b)(3) of the Rights in Technical Data -Noncommercial Items at DFARS 252.227-7013 (FEB 2014) and FAR 52.227-19 (DEC 2007).

Data contained herein pertains to a commercial product and/or commercial service (as defined in FAR 2.101) and is proprietary to NetApp, Inc. All NetApp technical data and computer software provided under this Agreement is commercial in nature and developed solely at private expense. The U.S. Government has a non-exclusive, non-transferrable, nonsublicensable, worldwide, limited irrevocable license to use the Data only in connection with and in support of the U.S. Government contract under which the Data was delivered. Except as provided herein, the Data may not be used, disclosed, reproduced, modified, performed, or displayed without the prior written approval of NetApp, Inc. United States Government license rights for the Department of Defense are limited to those rights identified in DFARS clause 252.227-7015(b) (FEB 2014).

## Trademark information

NETAPP, the NETAPP logo, and the marks listed at <http://www.netapp.com/TM> are trademarks of NetApp, Inc. Other company and product names may be trademarks of their respective owners.