stonebranch workload Automation Simplified.

Universal Controller 6.3.x

Security

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Security

Setting Up Security

Overview	

Adding Users

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Adding Groups

Assigning Roles to Users or Groups

Assigning Permissions to Users or Groups

Login Credentials

Business Services

POP L

The information on these pages also is located in the Universal Controller 6.3.x Security.pdf.



Viewing Audit Records

Security Overview

Universal Controller Security

Setting up Universal Controller security involves the following steps:

- Creating users and assigning them passwords.
- Creating groups of users.
- Assigning permissions (access to Controller records) to users and groups.
- Assigning permissions (access to controller recercle) to acors and groups.
 Assigning roles (permission to perform administrative functions) to users and groups.
 Creating credentials that allow the Controller to log in to remote machines and execute jobs.

Users and Groups

Overview

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- Default Users and Groups
 - Adding a User
 - User Details
 - User Details Field Descriptions
- Adding a Group
 - Group Details
 - Group Details Field Descriptions
- Additional Details
- Assigning Users to Groups

Overview

You can create any number of users and user groups for Universal Controller, and you can assign any user to any user group.

The roles and permissions that you assign each user and group determines the level of access to Universal Controller functions.

You can assign any role and permission to any user or any user group. If you assign a user to a group, the user inherits all roles and permissions assigned to that group.

Default Users and Groups

Default User

The default Universal Controller user is ops.admin. It is assigned to one of the default Universal Controller groups, Administrator Group.

Default Groups

There are two default groups:

- Administrator Group has access to all Controller functions; by default, it is assigned the ops.admin role, which has permissions on all Controller functions.
- Everything Group has access to all functions that do not require the ops.admin role.

Adding a User

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Note You must have administrative permissions to add users.

By default, a new user has no permissions. Until permissions are granted, a user can log into the Universal Controller user interface and view options in the Navigator, but cannot perform any tasks.

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Note A.

To open an existing record on the list, either:

- Click a record in the list to display its record Details below the list. (To clear record Details below the list, click the New button that displays above and below the Details.)
- Clicking the Details icon next to a record name in the list, or right-click a record in the list and then click Open in the
- Action menu that displays, to display a pop-up version of the record Details.
 Right-click a record in the a list, or open a record and right-click in the record Details, and then click **Open In Tab** in the Action menu that displays, to display the record Details under a new tab on the record list page (see Record Details as Tabs).

User Details

The following User Details is for an existing user. See the field descriptions, below, for a description of all fields that display in the User Details.

			🔛 Update 🎲 Delete 📑 Refres	h 渊 Clo
User 🔍 U	ser Roles Member of Groups Permissions			
Details				
User Id :	stonebranch-user-01	Time Zone :	System (US/Eastern)	*
Password :	••••••	Title :	IT Technician	~
First Name :	stone a	Department :		
Middle Name :		Manager :		× 5
Last Name :	branch	Business Phone :		
Email :		Mobile Phone :		
Password Requires Reset :		Web Browser Access :	- System Delaut V	
Locked Out :				
Active :		Web Service Access :	System Default 🗸	
開 Update	🕼 Delete 🛛 🕼 Refresh 🛛 💥 Close			

User Details Field Descriptions

The following table describes the fields, buttons, and tabs that display in the User Details.

Field Name	Description
Details	This section contains detailed information about the user.
User ID	Log in ID for this user.
Password	Password of this user.
First Name	First name of this user.
Middle Name	Middle name of this user.
Last Name	Last name of this user.
Email	Email address of this user.
Password Requires Reset	If enabled, the user will be prompted to reset the password at next login.
Locked out	If enabled, locks out the user. This field is enabled automatically if the maximum number of successive failed login attempts has been reached by the user.
Active	If enabled, the user ID is active and the user can log in. If disabled, the user is permanently deactivated; the user will not appear in user lists and cannot be used for access to the Controller.
Time Zone	Time zone of this user. When this user logs in, all scheduling times will be shown in the user's time zone, unless the trigger specifies a different time zone.
Title	Business title of this user.
Department	Business department of this user.
Manager	Business manager of this user.
Business Phone	Business phone number of this user.
Mobile Phone	Mobile phone number of this user.

Web Browser Access	Specifies whether or not the user can log in to the user interface.
A00033	Options:
	 System Default - User restriction for logging in to the user interface is based on the current system default value of the System Default Web Browser Access Universal Controller system property. Yes - User is not restricted from logging in to the user interface. No - User is restricted from logging in to the user interface.
Command Line Access	Specifies whether or not the user can log in to the Universal Controller Command Line Interface (CLI).
	Options:
	 System Default - User restriction for logging in to the CLI is based on the current system default value of the System Default Command Line Access Universal Controller system property. Yes - User is not restricted from logging in to the CLI. No - User is restricted from logging in to the CLI.
Web Service Access	Specifies whether or not the user can log in to the Universal Controller RESTful Web Services API. Options:
	 System Default - User restriction for logging in to the Universal Controller Web Services is based on the current system default value of the System Default Web Service Access Universal Controller system property. Yes - User is not restricted from logging in to the Universal Controller Web Services. No - User is restricted from logging in to the Universal Controller Web Services.
Buttons	This section identifies the buttons displayed above and below the User Details that let you perform various actions.
Save	Saves a new user record in the Controller database.
Update	Saves updates to the record.
New	Displays empty (except for default values) Details for creating a new user.
Delete	Deletes the current record.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of this user.
Tabs	This section identifies the tabs across the top of the User Details that provide access to additional information about the user.
User Roles	Allows you to assign roles to this user.
Member of Groups	Allows you to assign this user to one or more groups.
Permissions	Allows you to assign permissions to this user.

Adding a Group

Note You must have administrative privileges to add groups.

A group is a collection of users. You can assign privileges and roles to groups or users. You can also assign groups to other groups.

Any user assigned to a group inherits all roles and permissions assigned to that group.

	Dashboards 🛛 Groups 🛯	Details for a new group displays.				
	✓ 5 Groups	Custom Filter - None -		😽 Filter 🔽	<u>G</u> o To 🥵 New	2
	Name *	Description	Parent	Updated By	Updated	
6	stonebranch-group-01	Description	Parent	ops.admin	2014-06-13 15:44:15 -040	10
	stonebranch-group-02			ops.admin	2014-06-13 15:44:20 -040	
	stonebranch-group-02			ops.admin	2014-06-13 15:44:24 -040	
	stonebranch-group-04			ops.admin	2014-06-13 15:44:27 -040	
	stonebranch-group-05			ops.admin	2014-06-13 15:44:30 -040	
`	✓ Group Details				🗐 Save 📃	New
	Group Group R	oles Group Members Child Groups Permissions				
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		hide the list above the Details. w button above the list to display a pop-u	p version of the Details.			
		e or more roles to the group, assign mem oup.	bers (users) to the group, as	sign other	groups to this g	roup, or assi

🔥 Note

To open an existing record on the list, either:

- Click a record in the list to display its record Details below the list. (To clear record Details below the list, click the **New** button that displays above and below the Details.)
- Clicking the Details icon next to a record name in the list, or right-click a record in the list and then click **Open** in the Action menu that displays, to display a pop-up version of the record Details.
- Right-click a record in the a list, or open a record and right-click in the record Details, and then click **Open In Tab** in the Action menu that displays, to display the record Details under a new tab on the record list page (see Record Details as Tabs).

Group Details

The following Group Details is for an existing group. See the field descriptions, below, for a description of all fields that display in the Group Details.

Ip Roles	Child Groups Permissions		
stonebranch-group-01		Parent :	~
	× 🖂		
_		× 🖂	✓ ☑

Group Details Field Descriptions

The following table describes the fields, buttons, and tabs that display in the Group Details.

Field Name	Description
Details	This section contains detailed information about the group.
Name	Name of this group.
Parent	Name of this group's parent group, if any.
Description	Description of this group.
Manager	Universal Controller user that is the manager of this group.
Buttons	This section identifies the buttons displayed above and below the Group Details that let you perform various actions.
Save	Saves a new group record in the Controller database.
Update	Saves updates to the record.
New	Displays empty (except for default values) Details for creating a new group.
Delete	Deletes the current record.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of this group.
Tabs	This section identifies the tabs across the top of the Group Details that provide access to additional information about the user.
Group Roles	Allows you to assign roles to this group.
Group Members	Allows you to assign users to this group.
Child Groups	Allows you to assign other groups to this group.
Permissions	Allows you to assign permissions to this group.

Additional Details

For information on how to access additional details - such as Metadata and complete database Details - for Users and Groups (or any type of record), see Records.

Assigning Users to Groups

You can assign users to groups from a User record and from a Group record.

1	Click the Group Members tab.		
	For a User, a list of all groups to which the user is assigned displ		
	For a User, a list of all groups to which the user is assigned displ	ay5.	
	User Details: stonebranch-user-01		
	User User Roles Member of Groups Permissions		
	New Edit		æ
	Group A	Updated By	Updated
	stonebranch-group-01	stonebranch-user-01	2014-07-08 10:43:39 -0400
	stonebranch-group-02	stonebranch-user-02	2014-07-08 10:43:39 -0400
	For a Group, a list of all users assigned to the group displays.		
	For a Group, a list of all users assigned to the group displays.		
	r		
	Group Details: stonebranch-group-01		
F	Group Details: stonebranch-group-01	Updated By	

dit Members			_
Collection		Groups List	
	9	stone branch	
Name A	^	Name A	•
stonebranch-group-03 stonebranch-group-04		stonebranch-group-01 stonebranch-group-02	
stonebranch-group-05			
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Step 5	To assign a User to a Group, move the User/Group from the Collection window to the List window:
	 To move a single entry, double-click it or click it once and then click the > arrow. To move multiple entries, Ctrl-click them and then click the > arrow. To move all entries, click the >> arrow.
	To unassign the User to a Group, move the User/Group from the List window to the Collection window:
	 To move a single entry, double-click it or click it once and then click the < arrow. To move multiple entries, Ctrl-click them and then click the < arrow. To move all entries, click the << arrow.
Step 6	Click Save.

Roles and Permissions

- Assigning Roles to Users or Groups
 - Description of Roles
- Assigning Permissions to Users or Groups
- Types of Permissions
 - General Permissions Field Descriptions
 - Agent Permissions
 - Application Permissions
 - Calendar Permissions
 - Credential Permissions
 - Script Permissions
 - Task Permissions
 - Task Instance Permissions
 - Trigger Permissions
 - Variable Permissions
 - Virtual Resource Permissions
- Exporting Permissions for a Group

Assigning Roles to Users or Groups

Roles control user access to administrative functions within Universal Controller. These functions include:

Setting up security.
Creating reports, filt

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- Creating reports, filters, and gauges.
- Creating agent clusters.
- Creating and promoting bundles of records.

Each role is a predefined collection of administrative functions (see Description of Roles, below). By assigning a role to a user or group, you automatically give that user or group all functions associated with that role.

Note You cannot add new roles to the Controller; you must assign administrative functions to groups or users using the predefined roles.

To assign roles to a user or group:

Step 1 Open a User or Group record.

User User Roles User Role Role construction User Role construction	Member of Groups Permissions Granted By	Inherited Updated By	Edit
3 User Roles Role <u>ops report group</u>		Inherited Updated By	Edit
Role	Granted By	Inherited Updated By	Edit
ops report group	Granted By	Inherited Updated By	
			Updated
and report clobal		No ops.admin	2014-07-08 11:20:28 -0400
ops report global		No ops.admin	2014-07-08 11:20:28 -0400
ops report publish		No ops.admin	2014-07-08 11:20:28 -0400
or a Group, click the	Group Poles tab. A list of Poles assigned to the (Group displays	
or a Group, click the	Group Roles tab. A list of Roles assigned to the C	Group displays.	
-		Group displays.	(*)
-	pup-02	Group displays.	(m)
Group Details: stonebranch-g	pup-02	Group displays.	Edit
Group Details: stonebranch-g Group Group Group Ro	pup-02	Group displays.	
Group Details: stonebranch-g Group @ Group Ro 3 Group Roles Role	s Group Members Child Groups Permissions		Edit
Group Details: stonebranch-g Group @ Group Ro 3 Group Roles Role	s Group Members Child Groups Permissions	Inherits Updated By	Edit

Collection		
	Role List	
	Stone b branch	
Name A	Name A	^
ops_admin	ops_report_global	
ops_agent_cluster_admin	ops_report_group	
ops_bundle_admin	ops_report_publish	
ops_dba		
ops_email_admin	→	
ops_filter_global		
ops_filter_group		
ops_imex		
ops_multi_update	4	
ops_promotion_admin		
ops_report_admin		
ops_restore_version		
ops_sap_admin		
ops_snmp_admin		
ops_user_admin		
ops_widget_admin		
	Save Cancel	
	Roles that have not been assigned to this User / Group. Roles that have been assigned to this User / Group.	
	ction window, enter characters in the text field above the N characters will display in the list.	lame column. Only
To filter the Users/Groups listed in the Colle Users/Groups containing that sequence of c		-
To filter the Users/Groups listed in the Colle Users/Groups containing that sequence of c To assign a Role to the User / Group, move	characters will display in the list. the Role from the Collection window to the Roles window k it or click it once and then click the > arrow. hem and then click the > arrow.	-
To filter the Users/Groups listed in the Colle Users/Groups containing that sequence of o To assign a Role to the User / Group, move 1. To move a single Role, double-click 2. To move multiple Roles, Ctrl-click t 3. To move all Roles, click the >> arro	characters will display in the list. the Role from the Collection window to the Roles window k it or click it once and then click the > arrow. hem and then click the > arrow.	v:

Description of Roles

The following table summarizes the roles available in the Controller.

Role Name Available Functions Contains Roles

ops_admin	All functions; this is the Universal Controller administrator role. The easiest way to assign full permissions to a user is to add the user to the Administrator Group, which by default is assigned the ops_admin role.	 ops_agent_cluster_admin ops_bundle_admin ops_dba ops_email_admin ops_filter_global ops_filter_group ops_multi_update ops_promotion_admin ops_restore_version ops_sap_admin ops_user_admin
ops_agent_cluster_admin	Create, update, and delete agent clusters.	
ops_bundle_admin	 Create, read, update, and delete Bundles. View Promotion Targets, including agent mappings. View Promotion History. View a record's list of bundles. View Promotion Schedules. Add a record to a bundle. Create bundles by date. Generate a Bundle Report. 	
ops_dba	Create, update, delete database connections.	
ops_email_admin	Create, update, delete email connections.	
ops_filter_global	Create global filters.	
ops_filter_group	Create filters that belong to a group of which this user is a member.	
ops_imex	List Import/Export XML.	
ops_multi_update	Update multiple records.	
ops_promotion_admin	 Create, read, update, and delete Creating Promotion Targets, including agent mappings. View Bundles. Refresh Target Agents. Promote records. Promote or schedule the promotion of a bundle. Reschedule, cancel, and delete Promotion Schedules. Generate a Bundle report. Accept bundles being promoted to a target server. (The Accept Bundle command is executed on the target server automatically as part of the Promote and Promote Bundle commands and does not involve user interaction.) 	
ops_report_admin	Create, update, and delete reports that are visible to Everyone or visible to all users within your Group(s), in addition to the roles granted by the ops_widget_admin role.	 ops_report_global ops_report_group ops_report_publish ops_widget_admin
ops_report_global	Create global reports.	
ops_report_group	Create reports that belong to a group to which this user is a member.	
ops_report_publish	Publish reports.	
ops_restore_version	Restore old versions of records.	
ops_sap_admin	Create, update, and delete SAP Connections.	
ops_snmp_admin	Create, update, and delete SNMP Managers, to which the Controller sends SNMP notifications.	

ops_user_admin	Create, update, and delete users and groups.	
ops_widget_admin	Create, update, and delete Widgets.	

Assigning Permissions to Users or Groups

Permissions control user access to Controller records and the types of actions that can be taken on the records. Each permission record specifies a record type, such as task or trigger, and the type of action can be taken on that record type, such as "create" or "delete."

You can further narrow down which records each permission applies to by specifying either name parameters or Business Services. For example, a given permission might apply only to tasks whose name begins with "SF," or a permission might apply only to tasks that have been assigned to a specific Business Service or to tasks that do not belong to any Business Services. See General Permissions Field Descriptions, below, for more details.

To add permissions to a user or group:

Step 1 Step 2	Cli Fo	r E	the P xamp		tab. A list o	T	nissions as	ssigned to th	e User / Group o	displays.]
		2 Per	Type Agent Task	Operations Read, Update, Exe Read, Update	Commands cute ALL	× *	_	Business Service B Yes Yes	usiness Services	Updated By stonebranch-user-01 stonebranch-user-01		New 2	
			A	of Busines	ss Services g to the data	s field a in B	and the M usiness S	ember of Ai ervices, you	have to add eit	alue is determined b rvice or Unassigne her or both Member nns and apply the de	ed fie of B	ld. If you want to a Business Services	apply a s and

V		🔚 Save 💥 Close
Permission		
- Details		
Type : None	*	
Create :		
Read:		
Update : 🕅		
Delete : 🕅		
Commands : None	v.	
Name : *		
Member of Any Business Service or Unassigned :	Unassigned to Business Service : 🕼	
Member of Business		~
Services :		
🔚 Save 🛛 💥 Close		
lect permissions for the selected user or gro	oup.	
e permissions available differ depending or	the Type of permission that you select. Available perm	issions are Create, I
	d types, additional Commands are available. If the perm	ission does not appl
cord type in the Type drop-down, the permis	ssion does not appear in the display.	

• Delete permission includes Read permission.

Types of Permissions

This section identifies the different types of permissions that you can add to a user or group.

General Permissions Field Descriptions

The following fields of information display in the Permissions Details for all Permission types:

Field Name	Description
Name	Applies this permission to records whose name matches the string specified here. Wildcards are supported.
Member of Any Business Service or Unassigned	Applies this permission both to records that belong to any Business Service and to records that do not belong to any Business Service.
Unassigned to Business Service	Applies this permission to records that do not belong to any Business Service. If this option is enabled, the user / user group will have the defined permissions on all records that do not belong to any Business Service.
Member of Business Services	Applies this permission to records that are members of the selected Business Service(s). Click the lock icon to unlock the field and select Business Services.

Agent Permissions

Permission Details			-	
		🔚 Save	💥 C	ose
Permission				
- Details				
Type :	Agent 👻			
Read :				
Update :				
Execute :				
Commands :				
Name :	None			
Member of Any Business Service or Unassigned :	Unassigned to Business Service :			
Member of Business Services :				¥
🛒 Save 🛛 🗱 C	lose			

Options	Description
Read	Grants permission to view an Agent definition. All users can view configured Agents in the Controller, so the Read check box always is checked.
Update	Grants permission to update an Agent definition. (Only certain fields can be updated.)
Execute	Grants permission to execute a task on an Agent.
Commands	 ALL: Grants permission to suspend and resume Agents. Resume Agent: Grants permission to resume the ability of a suspended Agent to run tasks. Suspend Agent: Grants permission to suspend the ability of an Agent to run tasks.

Permission Details			
		📳 Save	💢 Close
Permission			
Details			
Details Type : Create : Read : Update : Delete : Commands : Name : Member of Any Business	Application v		
Create :			
Read :			
Update :			
Delete :			
Commands :	None 👻		
Name :			
Member of Any Business Service or Unassigned :	Unassigned to Business Service :		
Member of Business Services :			*
🕅 Save 🛛 💥 C	lose		

Application Permissions

Options	Description
Create	Grants permission to create a new application.
Read	Grants permission to read an application.
Update	Grants permission to update an application.
Delete	Grants permission to delete an application.

Commands	See Application Control Tasks for details. Options:
	 ALL: Grants permission to execute a Start, Stop, and Query from the Application resource screen. Start: Grants permission to execute a Start from the Application resource screen. Stop: Grants permission to execute a Stop from the Application resource screen. Query: Grants permission to execute a Query from the Application resource screen.

Calendar Permissions

Permission Details			X
		🖷 Save 💥 Close	
Permission			1
Details			
Type :	Calendar		
Create :			
Read	V		
Update :			
Delete :			
Commands :			
	None ALL		
Member of Any Business Service or Unassigned :	Copy Calendar	Unassigned to Business Service :	
Member of Business Services :		M	
🕅 Save 🛛 💥 C	llose		

Options	Description
Create	Grants permission to create a new calendar.
Read	Grants permission to read a calendar. All users can view Calendars in the Controller, so the Read check box always appears checked.
Update	Grants permission to update a calendar.
Delete	Grants permission to delete a calendar.
Commands	 ALL: Grants permission to copy a calendar. Copy Calendar: Grants permission to copy a calendar.

Credential Permissions

Permission Details			
		📳 Save	洋 Close
Permission			
Details			
Type :	Credential		
Create :			
Read :			
Update :			
Delete :			
Execute :			
Commands :			
Name :	None		
Member of Any Business Service or Unassigned :	Unassigned to Business Service :		
Member of Business Services :			~
📳 Save 🛛 🗱 C	058		

Options	Description
Create	Grants permission to create a new credential.
Read	Grants permission to read a credential. All users can view Credentials in the Controller, so the Read check box always appears checked.
Update	Grants permission to update a credential.
Delete	Grants permission to delete a credential.
Execute	Grants permission to execute a task that requires a credential.
Commands	n/a

Script Permissions

ermission Details			
		🔚 Save	💥 Close
Permission			
Details			
Type :	Script v		
Create :			
Read :			
Update :			
Delete :			
Execute :			
Commands :	None 🗸 🗸		
Name :			
Member of Any Business Service or Unassigned :	Unassigned to Business Service :		
Member of Business Services :			~
🛒 Save 🛛 💥 C	ose		

Options	Description	
Create	Grants permission to create a new script.	
Read	Grants permission to read a script.	
Update	Grants permission to update a script.	
Delete	Grants permission to delete a script.	

Execute	Grants permission to execute a script contained by a task.
Commands	n/a

Task Permissions

Permission Details			
		📆 Save	💥 Close
Permission			
Details			
Type :	Task 👻		
Create :			
Read :			
Update :			
Delete :			
Commands :			
Name :	None ALL		
Permission Details Permission Details Details Create: Create: Create: Delete: Commands: Name: Member of Any Business Service or Unassigned : Member of Business Services: Services: Services: Services: Commands: Comman	O any Taala	Unassigned to Business Service :	
Service or Unassigned : Member of Business	Launch Recalculate Forecast	Service . —	
Services :	Reset Statistics		~
🔚 Save 🛛 💥 C	058		
	1000		

Options	Description
Create	Grants permission to create a new task.
Read	Grants permission to read a task.
Update	Grants permission to update a task.
Delete	Grants permission to delete a task.
Commands	 ALL: Grants permission to issue any command. Copy Task: Grants permission to copy a task. Launch: Grants permission to launch a task. Recalculate Forecast: Grants permission to recalculate a forecast. Reset Statistics: Grants permission to reset statistics, including statistics being tracked by each parent Workflow of a task. Reset z/OS Override Statistics: Grants permission to reset z/OS override statistics.

Task Instance Permissions

ermission Details		
		🔚 Save 💥 Close
Permission		
Details		
Type :	Task Instance	
Read :		
Update :		
Delete :		
Commands :	None 💙	
Name :		
Member of Any Business Service or Unassigned :	Unassigned to Business Service :	
Member of Business Services :		*
🦷 Save 🛛 🗱 C	ose	

Options	Description
Create	Task instances are created automatically when the task launches, so the Create permission does not appear.
Read	Grants permission to read a task instance
Update	Grants permission to update certain fields on a task instance.
Delete	Grants permission to delete a task instance.
Commands	 For command descriptions, see Manually Running and Controlling Tasks. ALL: Grants permission to issue any command. Cancel: Grants permission to cancel a Task Instance. Clear All Dependencies: Grants permission to clear all dependencies on a Task Instance. Clear Predecessors: Grants permission to clear all predecessors on a Task Instance. Clear Exclusive: Grants permission to clear all mutual exclusive dependencies from a Task Instance. Clear Resources: Grants permission to clear all resource dependencies of a Task Instance. Force Finish: Grants permission to force finish a task instance. Hold: Grants permission to put a Task Instance on hold. Insert Task: Grants permission to return a Task Instance. Mark as Satisfied: Can mark a dependency as satisfied. Re-run: Grants permission to restart a z/OS task from a specific step. Release: Grants permission to release a Task Instance from hold. z/OS Restart: Grants permission to release a workflow and all its tasks from hold. Retrieve Output: Grants permission to execute the Retrieve Output button. Set Priority Low: Grants permission to change the priority of a task to Medium. Set Priority Hedium: Grants permission to change the priority of a task to Medium. Set Completed: Grants permission to set a Manual Task Instance status to a new started time. Skip: Grants permission to set a Manual Task Instance status to a new started time. Skip: Grants permission to set a Manual Task Instance status to a new started time.
	Note Universal Controller will initially check for command permission specifically for the task instance. If no command permission is granted for the task instance, Universal Controller will check if command permission is granted for the parent workflow task instance, and then continue to check for command permission up the workflow task instance hierarchy.

Trigger Permissions

rmission Details		
		🔚 Save 💥 Close
Permission		
- Details		
Type :	rigger 🗸	
Create :		
Read:		
Update :		
Delete :		
Commands :	- None	
Name :		
Member of Any Business Service or Unassigned :	Unassigned to Business Service :	
Member of Business Services :		*
🦷 Save 🛛 💥 C	Se	

Options	Description	
Create	Grants permission to create a trigger.	
Read	Grants permission to read a trigger.	
Update	Grants permission to update a trigger.	
Delete	Grants permission to delete a trigger.	
Commands	 ALL: Grants permission to do all listed below. Assign Execution User: Grants permission to override the execution user of task instances launched by a trigger. Copy Trigger: Grants permission to copy a trigger. Disable Trigger: Grants permission to disable a trigger. Enable Trigger: Grants permission to enable a trigger. Recalculate Forecast: Grants permission to recalculate a forecast. Trigger Now: Grants permission to trigger (launch) a task. 	

Variable Permissions

Permission Details			
		📳 Save	💥 Close
Permission			
- Details			
Type :	Variable 👻		
Create :			
Read :			
Update :			
Delete :			
Commands :	None 🗸		
Name :			
Member of Any Business Service or Unassigned :	Unassigned to Business Service :		
Member of Business Services :			~
🕅 Save 🛛 🗱 C	ose		

Options	Description
Create	Grants permission to create a variable.

Read	Grants permission to read a variable.
Update	Grants permission to update a variable.
Delete	Grants permission to delete a variable.
Commands	n/a

Enabling / Disabling Enhanced Variable Security

Important

If you have upgraded from a Controller release that did not previously support the Variable permission type, it is important that you review and assign global variable permissions to all appropriate users/groups to avoid impacting existing workload that requires the use of global variables to execute.

By default, enhanced global variable security is enabled; the Variable Security Enabled Universal Controller system property is set to true.

This controls global variable access the following ways:

- Users with the ops_admin role have full access to all global variables.
- Users with the ops_promotion_admin role have Read access to all global variables.
- Create, Read, Update, and Delete permissions must be assigned to users explicitly if those permissions are not granted through the ops_admin or ops_promotion_admin role.
- Only those global variables for which a user has Read permission will be visible from the Variables list.
- Only those global variables for which the Execution User of a task instance has Read permission will be available within the variable scope of a task instance.
- A Set Variable action for a global variable will require appropriate global variable Create or Update permission.
- CLI and Web Services APIs will require appropriate global variable permissions depending on whether the command will **Read**, **Create**, or **Update** a global variable.
- Create Bundle By Date command will only add a global variable to the bundle if the:
 - Global variable qualifies for the specified date.
 - User invoking the command has Read permission for that global variable.

All defined Variable permissions will be enforced unless enhanced global variable security has been disabled by setting Variable Security Enabled to **false**. This allows all global variables to be managed and used by any valid Universal Controller user.

Virtual Resource Permissions

Permission Details			_)[]X]
		🔡 Save	💢 Close
Permission			
Details			
Type :	Virtual Resource		
Create :			
Read :			
Update :			
Delete :			
Commands :	None 🗸 🗸		
Name :	*		
Member of Any Business Service or Unassigned :	Unassigned to Business Service :		
Member of Business Services :			~
🕅 Save 🗶 C	ose		

Options	Description
Create	Grants permission to create a virtual resource.
Read	Grants permission to read a virtual resource. All users can view virtual resources in the Controller, so the Read check box always appears checked.

Update	Grants permission to update a virtual resource.
Delete	Grants permission to delete a virtual resource.
Execute	Grants permission to execute a virtual resource.
Commands	n/a

Enabling Enhanced Virtual Resource Security

Important

If you have upgraded from a Controller release that did not previously support the Virtual Resource permission type, it is important that you review and assign virtual resource permissions to all appropriate users/groups to avoid impacting existing workload that requires the use of virtual resources to execute.

By default, enhanced virtual resource security is enabled; the Virtual Resource Security Enabled Universal Controller system property is set to true.

This controls virtual resource access the following ways:

- All users will have Read access to virtual resources.
- Users with the ops_admin role will have full access to all virtual resources.
- Create, Update, Delete, and Execution permissions must be explicitly assigned to users if those permissions are not granted through the ops_promotion_admin role.
- Only those virtual resources for which the Execution User of the task instance has Execute permission can be requested by the task instance. Any virtual resource requested by task instances with an Execution User that does not have Execute permission for that virtual resource will result in the task instance going into Start Failure status, with status description Execution for virtual resource "resource-name" prohibited due to security constraints.
- Set Virtual Resource Limit System Operation action will require appropriate virtual resource Update permission.
- CLI and Web Services APIs will require appropriate virtual resource permissions: Updating a virtual resource limit through the CLI and Web Services APIs will require virtual resource Update permission.

All defined Virtual Resource permissions will be enforced unless enhanced virtual resource security has been disabled by setting Virtual Resource Security Enabled to **false**. This allows all virtual resources to be managed and used by any valid Universal Controller user.

Exporting Permissions for a Group

The Controller lets you export user groups and their permissions, which then can be imported into another Controller system. Only the permissions listed under the Permissions tab for each group will be exported.

 Step 1
 From the Administration navigation pane, select Security > Groups. The Groups list displays.

 Step 2
 As desired, filter the list to select the group(s) whose permissions you want to export. When you perform the export, all groups matching the filter will be exported.

✓ 5 Groups		Custom Filter None	~	🦁 Filter 🕺 New	2
Name A	Descr	ption Parent	Updated By	Updated	-
stonebranch-group-01	1 Sort Ascending		ops.admin	2014-06-13 15:44:15 -0400)
stonebranch-group-02	Sort Descending		ops.admin	2014-06-13 15:44:20 -0400	
stonebranch-group-03	Configure Sort		ops.admin	2014-06-13 15:44:24 -0400)
stonebranch-group-04	Auto Fit All Columns		ops.admin	2014-06-13 15:44:27 -0400)
stonebranch-group-05	Auto Fit		ops.admin	2014-06-13 15:44:30 -0400)
	Columns				
	Eayouts	Þ			
	Save Layout				
	💼 Save As Default Layo	ut			
✓ Group Details	🚳 Restore Default Layo	ut		🔚 Save 📃 I	New
Group Group Roles Group Members	🕞 Import	ins			
Details	Export	CSV			
Name :		XLS (Excel)		× 3	7
Description :		😡 XLSX			
		PDF			
Save New		Permissions For Group			

To export or import the **Permissions For Group** XML, you must have both the ops_imex and ops_admin roles.

If the groups do not exist on the import system, they (and their Permissions) will be created there.

If the groups do exist on the import system, only the description of the groups and the permissions under their **Permissions** tab will be replaced with those from the imported XML.

Credentials

- Overview
- Defining a Credential
 - Credential Details
 - Credential Details Field Descriptions

Overview

Credentials are the user ID and password under which an Agent runs tasks on the machine where the Agent resides.

Agent credentials are defined during installation, but via the user interface, you also can define credentials and assign them to any task or Agent.

When prompted for credentials, the Agent looks in the following locations, in this order, for the ID and password:

- 1. If the task provides credentials, the Agent uses those credentials.
- 2. If the task does not provide credentials, the Agent uses the credentials in its Agent Details record.
- 3. If the Agent resource definition does not provide credentials, the Agent uses the credentials defined at installation.

For File Transfer tasks, the Agent may need additional credentials for logging on to the FTP server.

Defining a Credential

Step 1		om the Automation Center edentials.	navigation pane, select Other > Crede	ntials. The Credentials list displays a list of all cu	irrently defined
	Ве	low the list, Credential De	tails for a new credential displays.		
		Credentials			
		✓ 5 Credentials	Custom Filter None	🗸 🦁 Filter 🔽 Go To 🍰 New	2
		Name 🔺	Runtime User Description	Updated By Updated	^
		stonebranch-credential-01	runuser01	stonebranch-user-01 2014-07-08 13:46:41 -0400)
		stonebranch-credential-02	runuser02	stonebranch-user-01 2014-07-08 13:46:50 -0400	
		stonebranch-credential-03	runuser03	stonebranch-user-01 2014-07-08 13:46:58 -0400)
		stonebranch-credential-04	runuser04	stonebranch-user-01 2014-07-08 13:47:07 -0400	
		stonebranch-credential-05	runuser05	stonebranch-user-01 2014-07-08 13:47:14 -0400)
		✓ Credential Details		🛱 Save 🗖 N	lew
				G Save In	1610
		Credential Versions Details Name :		/ersion : 1	
		Runtime User :			
		Runtime			
		Password :			
		Description :			
		Key Location (FTP only):			
		Member of			
		Business Services :		*	
		🔚 Save 📃 N	lew		
Step 2			w credential, using the field descriptions ral identical user names for different sys	below as a guide. As a best practice, use an alia tems all having different passwords.	s in the Name
			elds, if available, display automatically.		
	То	display more of the Detail	Is fields on the screen, you can either:		
			e list above the Details. n above the list to display a pop-up vers	ion of the Details.	
Step 3	Cli	ck the Save button. The c	redential is added to the database, and	all buttons and tabs in the Credential Details are	enabled.

۸	Note To open an existing record on the list, either:
	 Click a record in the list to display its record Details below the list. (To clear record Details below the list, click the New button that displays above and below the Details.) Clicking the Details icon next to a record name in the list, or right-click a record in the list and then click Open in the Action menu that displays, to display a pop-up version of the record Details. Right-click a record in the a list, or open a record and right-click in the record Details, and then click Open In Tab in the Action menu that displays, to display the record Details under a new tab on the record list page (see Record Details as Tabs).

Credential Details

The following Credential Details is for an existing credential. See the field descriptions, below, for a description of all fields that display in the Credential Details.

Credential Details: stone	branch-credential-01				
		📳 Update	Delete	S Refresh	💢 Close
Credential OVer	sions				
Details					!
Name :	stonebranch-credential-01 Version : 2				
Runtime User :	runuser01				
Runtime Password :	•••••				
Description :					
Key Location (FTP only) :					
Member of Business Services :					~
Update	🗊 Delete 🛛 😫 Refresh 🛛 🗱 Close				

For information on how to access additional details - such as Metadata and complete database Details - for Credentials (or any type of record), see Records.

Credential Details Field Descriptions

The following table describes the fields, buttons, and tabs that display in the Credential Details.

Field Name	Description		
Details	This section contains detailed information about the credential.		
Name	Required. Name for this credential.		
Version	System-supplied; version number of the current record, which is incremented by Universal Controller every time a user updates a record. Click on the Versions tab to view previous versions. For details, see Record Versioning.		
Runtime User	Runtime user ID, including an LDAP- or AD-formatted user ID, under which the job will be run.		
Runtime Password	Runtime user's password.		
Description	Description for this record.		

Key Location (FTP only)	Using SFTP requires that you supply a valid credential that specifies the location of the SSL Private key on your Agent. This field provides the location, which must exist on the Agent where you intend to run the SFTP task. Currently, the Controller does not support password authentication for SFTP Transfer.
	For File Transfer over SSL, make sure you have your private/public keys properly set up and working before you configure the Controller to use it. For example, to validate the keys, log into your destination server from your agent server using ssl.
Member of Business Services	User-defined; allows you to select one or more Business Services that this record belongs to.
Buttons	This section identifies the buttons displayed above and below the Credential Details that let you perform various actions.
Save	Saves a new Credential record in the Controller database.
Update	Saves updates to the record.
New	Displays empty (except for default values) Details for defining a new credential.
Delete	Deletes the current record.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of this credential.
Tabs	This section identifies the tabs across the top of the Credential Details that provide access to additional information about the credential.
Versions	Stores copies of all previous versions of the current record. See Record Versioning.

Business Services

- Overview
 - Business Service Usage
 - Record Types for Business Services
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Overview

The Universal Controller Business Services feature allows you to organize your data into groups of related information.

You can create Business Services that represent your organization and assign individual records of different record types to each Business Service. You can then sort and filter the lists of these record types based on the Business Services, as well as generate reports.

You also can take advantage of Business Services when you set up security by assigning permissions only to users and/or user groups that belong to specific Business Services.

You also can promote Bundles that include records from one or more specific Business Services.

Business Service Usage

For example, you may want to place all records of different record types related to accounting in a Business Service named Accounting.

A Business Service of related records can be identified via:

- Permissions
- Reports
- Dashboard view
- Filtering

Record Types for Business Services

You can assign any record of the following record types to one or more Business Services:

- Agents
- Applications
- Calendars
- Credentials
- Scripts
- Tasks
- Task Instances
- Triggers

Creating Business Services

Note You must be assigned the ops_admin role in order to perform this procedure.

Business Services 🔣			
✓ 5 Business Services	Custom Filter None	🗸 🦁 Filter	. 🔯 <u>G</u> o To 🧮 New 🍣
Name A	Description	Updated By	Updated A
stonebranchbusinessservice 01		stonebranch-user-01	2014-06-13 15:19:37 -0400
stonebranchbusinessservice 02		stonebranch-user-02	2014-06-13 15:19:47 -0400
stonebranchbusinessservice 03		stonebranch-user-03	2014-06-13 15:19:51 -0400
stonebranchbusinessservice 04		stonebranch-user-04	2014-06-13 15:19:56 -0400
stonebranchbusinessservice 05		stonebranch-user-05	2014-06-13 15:20:00 -0400
Business Service Versions Details			
V Business Service Details			📕 Save 📃 New
Name :	Vers	ion : 1	
Description :			
Save New			
Enter/select Details for a new Busin	ness Service, using the field description	ons below as a quide	
	less cervice, using the held descriptic	she below us a galac.	
 Required fields display in b 	ooldface. available, display automatically.		
 Default values for fields, if a 			
 Default values for fields, if a Fo display more of the Details fields 	s on the screen, you can either:		
	s on the screen, you can either:		
Fo display more of the Details fields Use the scroll bar. 			
 o display more of the Details fields Use the scroll bar. Temporarily hide the list ab 		of the Details.	

🔥 Note

To open an existing record on the list, either:

- Click a record in the list to display its record Details below the list. (To clear record Details below the list, click the **New** button that displays above and below the Details.)
- Clicking the Details icon next to a record name in the list, or right-click a record in the list and then click **Open** in the Action menu that displays, to display a pop-up version of the record Details.
- Right-click a record in the a list, or open a record and right-click in the record Details, and then click **Open In Tab** in the Action menu that displays, to display the record Details under a new tab on the record list page (see Record Details as Tabs).

Business Service Details

The following Business Service Details is for an existing Business Service. See the field descriptions below for a description of the fields that display in the Business Service Details.

Business Service Details	: stonebranchbusinessservice 01				_
		🔚 Update	🇊 Delete	S Refresh	💥 Close
Business Service	Versions				
Details					
Name :	stonebranchbusinessservice 01 Version : 1				
Description :					
🔚 Update	🗊 Delete 🛛 🕼 Refresh 🛛 💥 Close				

For information on how to access additional details - such as Metadata and complete database Details - for Business Services (or any type of record), see Records.

Business Service Details Field Descriptions

The following table describes the fields, buttons, and tabs that display in the Business Service Details.

Field Name	Description					
Details	This section contains detailed information about the Business Service.					
Name	Name used within the Controller to identify this Business Service. It can contain a maximum of 40 alphanumerics.					
Version	System-supplied; version number of the current record, which is incremented by the Controller every time a user updates a record. Click the Versions tab to view previous versions. For details, see Record Versioning.					
Description	User-defined: description of this record.					
Buttons	This section identifies the buttons displayed above and below the Task Details that let you perform various actions.					
Save	Saves a new task record in the Controller database.					
Update	Saves updates to the record.					
New	Displays empty (except for default values) Details for creating a new task.					
Delete	Deletes the current record.					
Refresh	Refreshes any dynamic data displayed in the Details.					
Close	For pop-up view only; closes the pop-up view of this task.					
Tabs	This section identifies the tabs across the top of the Task Details that provide access to additional information about the task.					
Versions	Stores copies of all previous versions of the current record. See Record Versioning.					

Assigning a Record to One or More Business Services

When creating or updating a record, use the **Member of Business Services** field to select one or more Business Services for that record. This, in effect, assigns the record to that Business Service.

You cannot perform an operation (create, read, update, or delete) or issue a command (such as copy) on a record that is a member of a Business Service if you do not have a Permission defined for that record type that includes that operation/command and Business Service membership.

Business Service Membership Considerations for Create, Update, and Delete

Create

When creating a record that is a member of one or more Business Services, the user must have Create permission that applies for each Business Service that the record is becoming a member of; otherwise, the operation will be prohibited.

Update

When updating a record, the user must have Update permission for both the original record and the updated record.

As long as an update is not changing the Business Service memberships of a record, the user only needs Update permission for one of the Business Services that the record is a member of.

If the update is adding or removing Business Service membership, further security constraints apply:

- For any added Business Service, the user must have Update permission for the modified record that applies explicitly for the Business Service being added.
- For any removed Business Service, the user must have Update permission for the original record that applies explicitly for the Business Service being removed.

Delete

When deleting a record that is a member of one or more Business Services, the user must have Delete permission that applies for each Business Service the record is a member of; otherwise, the operation will be prohibited.

Audits

- Overview
- Displaying Audits
 - Audit Details Field Descriptions

Overview

Audits are detailed records of all user interactions with the Controller, including before and after information related to any change and a description of the difference.

Audits are created when the user performs any of the following actions:

- Logging actions: log in, log out, or login failure.Creates, updates, or deletes a record.
- Issues an action or command (for example, Launch Task or Trigger Now).
- Imports or exports records on a list.

Displaying Audits

✓ 18 Audits		Custom Filter None 👻 😵		Filter 🔯 Go To 🍣		
Audit Type 🌢	Audit Date	Source	Status	Description	Updated By	Updated
Command	2014-07-08 13:23:54 -0400	User Interface	Success	Executing Command: LAUNCH on Copy Of zos-complet	stonebranch-user-01	2014-07-08 13:23:54 -0400
Command	2014-07-08 13:23:20 -0400	User Interface	Success	Executing Command: COPY TASK on zos-test-complet	stonebranch-user-02	2014-07-08 13:23:20 -0400
Command	2014-07-08 13:20:03 -0400	User Interface	Success	Executing Command: LAUNCH on zos-completion-sys	stonebranch-user-03	2014-07-08 13:20:03 -0400
Create	2014-07-08 13:38:57 -0400	User Interface	Success	Create: ListGridFilterBean Mine, sys_id: 6b4f689fa940	stonebranch-user-04	2014-07-08 13:38:57 -0400
Create	2014-07-08 13:11:16 -0400	User Interface	Success	Create: PermissionBean Task: Read, Update, sys_id: 4	stonebranch-user-05	2014-07-08 13:11:16 -0400
Create	2014-07-08 13:10:50 -0400	User Interface	Success	Create: PermissionBean Agent: Read, Update, Execut	stonebranch-user-04	2014-07-08 13:10:50 -0400
Delete	2014-07-08 13:23:11 -0400	User Interface	Success	Delete: TaskWorkflowBean Copy Of zos-completion	stonebranch-user-05	2014-07-08 13:23:11 -0400
Restore Ver	. 2014-07-08 12:44:08 -0400	User Interface	Success	Restore Version: ApplicationBean zos-test-application	stonebranch-user-04	2014-07-08 12:44:08 -0400
Server Oper.	2014-07-08 11:52:19 -0400	User Interface	Complete	Running Server Operation: Bulk Import	stonebranch-user-05	2014-07-08 11:52:39 -0400
Update	2014-07-08 13:47:14 -0400	User Interface	Success	Update: CredentialsBean stonebranch-credential-05, s	stonebranch-user-04	2014-07-08 13:47:14 -0400
📰 Update	2014-07-08 13:47:07 -0400	User Interface	Success	Update: CredentialsBean stonebranch-credential-04, s	stonebranch-user-01	2014-07-08 13:47:07 -0400
📰 Update	2014-07-08 13:46:58 -0400	User Interface	Success	Update: CredentialsBean stonebranch-credential-03, s	stonebranch-user-02	2014-07-08 13:46:58 -0400
📰 Update	2014-07-08 13:46:50 -0400	User Interface	Success	Update: CredentialsBean stonebranch-credential-02, s	stonebranch-user-03	2014-07-08 13:46:50 -0400
📰 Update	2014-07-08 13:46:41 -0400	User Interface	Success	Update: CredentialsBean stonebranch-credential-01, s	stonebranch-user-04	2014-07-08 13:46:41 -0400
📰 Update	2014-07-08 12:43:10 -0400	User Interface	Success	Update: ApplicationBean zos-test-application, sys_id:	stonebranch-user-05	2014-07-08 12:43:10 -0400
4						•

udit Details			
			💥 Close
Audit © Ch	ild Audits		
Details			
Audit Type :	Update ~	Table Name :	ops_credentials
Audit Date :	2014-07-08 13:47:07 -0400	Table Key:	444e0cf355894a179b06b932c38f1238
Source :	User Interface 🗸	Parent Audit :	
Created :	2014-07-08 13:47:07 -0400	Created By:	stonebranch-user-04.
Status :	Success		
Description :	Update: CredentialsBean stonebranch-credential-04, sys_id: 4440	e0cf355894a179b06	3b932c38f1238
Before :	CredentialsBean [{credentials=stonebranch-credential-04} {desc {runtime_pass_phrase=null} {runtime_password=*****} {runtime_ -0400} {sys_id=444e0cl355894a179b06b932c38f1238} {sys_upd	_user=user 1} {sys_u	created_by=ops.admin} {sys_created_on=2014-06-13 15:20:53
After :	CredentialsBean [{credentials=stonebranch-credential-04} {desc {runtime_pass_phrase=null} {runtime_password=*****} {runtime_ 15:20:53 -0400} {sys_id=444e0cf355894a179b06b932c38f1238} {version=2}]	_user=runuser04} {s	ys_created_by=ops.admin} {sys_created_on=2014-06-13
Difference :	[Changed version: 1 -> 2] [Changed runtime_user: user 1 -> runus	ser04]	
Additional Information :			

Audit Details Field Descriptions

The following table describes the fields and tabs that display in the Audit Details.

Field Name	Description
Details	This section contains detailed information about the audit.
Audit Type	Type of audit for which this Audit record was created. Options: CLI Create Command Delete Delete Override File Delete Version Export Import Restore Version Server Operation Update User Login z/OS Auto-Restart
Table Name	Name of the table for which the user interaction was performed.
Audit Date	Date when this audit was created.
Table Key	Encrypted key to the table for which the user interaction was performed.

Source	Location of the user interaction.
	Options:
	 Agent Message Command Line Scheduled Set Variable Action Task Instance User Interface Web Service
Parent Audit	Parent audit for which this audit was created automatically.
Created	Date when this audit was created.
Created By	User that created this audit.
Status	Status of the audit.
Description	Description of the user interaction for which this audit was created.
Before	Image of data before the user interaction.
After	Image of data after the user interaction.
Difference	Difference in the data as a result of the user interaction
Additional Information	Any additional information captured for this user interaction.
Tabs	This section identifies the tabs across the top of the Audit Details that provide access to additional information about the audit.
Child Audits	List of any child audits for this audit.