stonebranch

Universal Controller 6.5.x

Bundles and Promotion

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Bundles and Promotion



Promotion History and the Restore Option



The information on these pages also is located in the Universal Controller 6.5.x Bundles and Promotion.pdf.

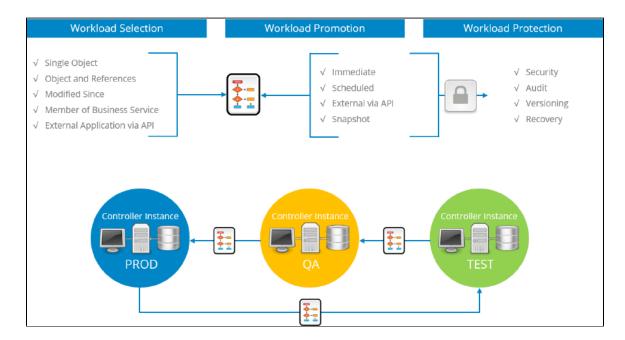
Bundles and Promotion Overview

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Overview

The Bundles and Promotion feature is designed to facilitate migrating (promoting) groups (bundles) of workload automation definitions (Triggers, Workflows, Tasks, Calendars, Custom Days, Variables, Business Services, Credentials, Agent Clusters, Virtual Resources, Scripts, Email Templates, Email Connections, Database Connections, SNMP Managers, SAP Connections, PeopleSoft Connections, Applications, and Universal Templates) between Universal Controller instances.

This allows you to develop, modify, and test changes in a non-production environment and migrate them to your production environment in a fully secure and audited manner (with back-out capabilities, if required).



One or more Workload automation definitions of the same type can be promoted without going through the process of creating a bundle, or you can use a bundle to group together related workload

automation definitions of different types for promotion at the same time.

Bundles can be promoted manually or scheduled to be promoted at a specific date and time. If you choose to schedule a bundle promotion, you can either promote the definitions as they stand at promotion time or use a snapshot of the definitions as they stand when the promotion schedule is created. This can be useful if you have completed changes that need to be promoted out-of-hours but want to allow more changes to be made on the source system without having to wait until the promotion is complete.

CLI (Command Line Interface) and API (Application Programming Interface) functions are provided to allow you to integrate the bundles and promotion feature with your external application life-cycle, source management, and change control systems.

If you plan on using the Bundles and Promotion feature, it is important that you review the recommended best practices for this feature.

Best Practices

Shared Records

Because workload automation definitions have many inter-related records (for example a single task may reference an agent, a credential, and virtual resources), it is important that care is taken to avoid breaking these links between Universal Controller instances when promoting.

For Agents, you can specify agent mappings on the promotion target definition to translate between an agent connected to the source Universal Controller instance and a different agent connected to the target Universal Controller instance.

For other definitions, you should ensure that each definition's UUID (Universally Unique IDentifier) is the same on all Universal Controller instances involved in your promotion hierarchy (Production, QA, Development, etc.).

One best practice for this is to create the definitions on one Universal Controller instance and promote them to the other Universal Controller instances. In some cases, these definitions will need to be different on each Universal Controller instance; for example, a credentials password will be different between the test and production instances. In these cases, you would need to modify them after the initial promotion, and you will need to take care not to promote the test definition and overwrite the production definition with the wrong password.

Another approach would be to use variables for the related definition; for example, a Task definition could use variables to identify its agent and credential definition. Note that variables can be nested, so you can use an instance identifier within the variable.

For example:

- On the PROD instance, the Agent name is PROD APP Server and the following global variable exists: ENV = PROD
- On the TEST instance, the Agent name is TEST_APP_Server and the following global variable exists: ENV = TEST

In this case, for the Agent within a Task definition, you would specify the following variable: \${ENV}_APP_Server.

Follow References

When promoting workload automation definitions between Universal Controller instances, you have the option to Follow References, which automatically includes inter-related records when promoting.

In other words, you do not have to build a bundle definition with all of the inter-related records; you can just specify a high-level item such as a trigger or workflow.

Caution should be used when considering the Follow References feature in relation to the shared records you may have on different Universal Controller instances. As of version 6.4.2.0 of the Controller, you have the ability to exclude certain definition types from the promotion when using the Follow References feature. For example, you can follow references and exclude variables.

Note that for some workload automation definitions, there are references that are followed implicitly, even if Follow References is not specified. For example, a workflow will always also promote the tasks within the workflow.

For additional information on Follow References behavior, see Records Promoted When Follow References is Selected or Not Selected.

Promoting Between Different Controller Versions

Promotion of workload automation definitions between Universal Controller instances at different versions is supported from version 6.3.0.0 and later. Promotion can be performed to earlier or later versions as long as both Universal Controller instances are at least at the 6.3.0.0 version.



Note

Promoting to an earlier version, when supported, requires that the promotion payload not include features or options that are unknown to the target promotion server. Any violation of this will prevent the promotion from continuing, as promoting those changes could have unintentional consequences.

Promoting to Same or Later Versions

Supported

Promotion from Controller 6.x to Controller 6.x of the same or later version, release, modification, and maintenance level is supported.

For example:

- 6.3.0.2 to 6.5.0.0
- 6.1.3.0 to 6.1.3.2

Promoting to Earlier Versions

Supported

Promotion from Controller 6.5.x to an earlier 6.5.x, 6.4.x, or 6.3.x version, release, modification, or maintenance level of the Controller is supported.

Promotion from Controller 6.5.x to an earlier 6.5.x version, release, modification, or maintenance level of the Controller is supported.

Not Supported

Promotion from Controller 6.5.x, 6.4.x, or 6.3.x to any 6.2.x or earlier version, release, modification, or maintenance level of the Controller is not supported.

Promotion from Controller 6.2.x to any earlier version, release, modification, or maintenance level of the Controller is not supported.

For example:

- 6.5.0.0 to 6.2.2.2
- 6.3.0.0 to 6.2.2.2
- 6.2.2.2 to 6.2.2.1
- 6.2.2.2 to 6.1.3.0
- 6.1.3.2 to 5.2.0.5

Bundling and Promoting Process

The general process for bundling and promoting your data is:

Step 1	Prepare a Bundle for Promotion record.
Step 2	Add records to a Bundle.
Step 3	Create a Promotion Target record for each target Controller.
Step 4	Specify Agent mappings between the source and target Controllers.
Step 5	Promote the Bundle to the target Controller.

These features use web services calls to communicate when you are promoting Bundles of records from one Controller to another.

Diagnosing Promotion Failures

The following error messages are provided for various promotion failure scenarios.



For a Bundle promotion, the beginning of each error message is: Promotion of bundle "bundle-name" failed with the following error(s):

For a Bundle-less promotion, the beginning of each error message is: Promotion failed with the following error(s):

Error Message	Diagnosis
Acceptance of bundle " <bur> "stundle-name "from <node-id< td=""> prohibited because a payload from a bundle with the same name is currently being processed by another Universal Controller process.</node-id<></bur>	Accept Bundle command invoked on the target for a bundle with a bundle name for which another Universal Controller process has already acquired a lock.
Cluster node information could not be determined for the promotion target because the host is unknown (hostname).	Invalid hostname.
Cluster node information could not be determined for the promotion target (Connection refused: connect).	Valid hostname, but no service to accept the connection.
Cluster node information could not be determined for the promotion target because the Web Service is unavailable; the target Universal Controller may still be initializing.	Attempt to promote to a target Universal Controller that is still initializing (starting up).
Cluster node information could not be determined for the promotion target because the user is not authorized; please verify the promotion target user and password.	Invalid user name and/or password.
Cluster node information could not be determined for the promotion target because the user is not authorized for Web Service Access; please verify the promotion target user has Web Service Access enabled.	Valid user name and password, but the user is not authorized for Web Service Access.
Cluster node release level for the promotion target could not be determined and one or more items being promoted require a minimum release level of 6300.	Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.

Cluster node release level for the promotion target is 6xxx, which does not meet the required release level of 6xxx.	Attempt to promote a definition, or a definition using a particular feature, that is not recognized by the promotion target.
	This message will be followed by one or more messages detailing the specific definition, or the specific feature used by a definition that is not recognized by the promotion target.
Command Accept Bundle prohibited due to security constraints.	Valid user name and password, but the user is not authorized for the Accept Bundle command, which requires the ops_promotion_admin role.
Command Accept Bundle prohibited due to security constraints. User on target server requires "ops_bundle_admin" role if "Promote Bundle Definition" option is enabled.	Valid user name and password, but the user is not authorized for the Accept Bundle command with the Promote Bundle Definition option enabled, which requires both the ops_promotion_admin role and the ops_bundle_admin role.*
Command Promote (or Promote Bundle) has been routed to the Active server and continues to run in the background.	Promote (or Promote Bundle) command was issued to a Passive server and routed to the Active server, where the Promote (or Promote Bundle) command will run, however, the Promote (or Promote Bundle) command did not complete within approximately 2 minutes.
	The Promote (or Promote Bundle) command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.
Credential " <credential-name>" cannot be promoted because web service credentials are not permitted; Universal Controller property Web Service Credentials Permitted is not enabled.</credential-name>	Attempt to promote to a target Controller where the Web Service Credentials Permitted Universal Controller system property is set to false.
Promoted {EMAIL CONNECTION: Incoming} with name "Gmail" and id 04e5e1074c1f42908d9b3f62f36fff50 is a different type than the original {EMAIL CONNECTION: Outgoing} with name "Gmail" and id 195fc662df8447dc90dec02ea8be0cb4	Attempt to promote an Incoming email connection type and the email connection on the target system is an Outgoing email connection type.
Promoted {EMAIL CONNECTION: Outgoing} with name "Gmail" and id ab36222512cf4ae4afa7e59a8ccbd684 is a different type than the original {EMAIL CONNECTION: Incoming} with name "Gmail" and id a037048f7c4b4e3f9e8691e3f664e5a7	Attempt to promote an Outgoing email connection type and the email connection on the target system is an Incoming email connection type.
Promoted {TASK: Universal} with name "ABC", id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e318 has a different universal template id than the original "ABC" with id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e319.	Attempt to promote a Universal Task with an associated Universal Template that is not equivalent to the Universal Template associated with the target Universal Task.
Promoted {TASK: Universal, TaskUniversalBean} with name "ABC" and id 8ee785079fcc4142873486e921bfe789 is a different type and/or class than the original {TASK: Timer, TaskSleepBean} with name "ABC" and id dfbd23df8ab24b2a9a0891ae2f8ca22f.	Attempt to promote any item of a specific type (or Java class) that matches another item of a different type (or Java class).
Promotion of bundle " <bundle-name>" with id <bundle-uuid> prohibited because the bundle is in use by another Universal Controller process.</bundle-uuid></bundle-name>	Promote Bundle command invoked on the source for a bundle with a bundle id for which another Universal Controller process has already acquired a lock.
Promotion Schedule operation for bundle " <bundle-name>" with id <bundle-uuid> prohibited because the bundle is in use by another Universal Controller process.</bundle-uuid></bundle-name>	Schedule Promotion command requires the bundle id lock, but another Universal Controller process has already acquired that lock.

Promotion target "promotion-target-name" has routed the promotion payload to the Active server and the Accept Bundle command continues to run in the background.	Upon receiving the promotion payload, the promotion target determined it was a Passive server and routed the payload to the Active server, where the Accept Bundle command will run, however, the Accept Bundle command did not complete within approximately 2 minutes.
	The Accept Bundle command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.
Promotion to an earlier release only supported for target releases starting with 6300.	Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.
SAP Task " <job-id-field-name>" requires a minimum promotion target release level of 6450 when unspecified.</job-id-field-name>	Attempt to promote an SAP Task with an unspecified SAP Job ID field to a pre-6.4.5.0 release of the Controller.
Script " <script-name>" cannot be promoted because scripts are not permitted; Universal Controller property "Windows/Linux Scripts Permitted" is not enabled.</script-name>	Attempt to promote a Script Script Type from a source server to a target server, where the target server is configured with the Windows/Linux Scripts Permitted Universal Controller system property set to false.
Unable to promote {APPLICATION: Windows Service} with name " <application-name>" and id 0f84fbb388c04bd09a2c7d5a0ac06c70 because an application cannot be promoted with a name change while generated application control tasks are being excluded.</application-name>	Attempt to promote an Application with a name change while excluding generated Application Control Tasks.
Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is referenced by one or more Universal Tasks.</credential-name></credential-type>	Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Task requires it to remain a Resolvable type.
Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is specified as a default value for one or more Universal Template Fields.</credential-name></credential-type>	Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Template Field default value requires it to remain a Resolvable type.
Unable to promote <credential-type> credential "<credential-name>" since original Web Service credential is referenced by one or more Web Service Tasks.</credential-name></credential-type>	Attempt to promote a Credential that has been converted from a Web Service type and at least one reference on the target system by a Web Service Task requires it to remain a Web Service type.
Unable to promote {CUSTOM DAY} with name " <custom-day-name>" and id 343f68c60cef48279647a45055349c47 because global custom days are not permitted; Universal Controller property "Custom Day Global Permitted" is not enabled.</custom-day-name>	Attempt to promote a global Custom Day when the Custom Day Global Permitted system property is set to false .
Unable to promote {SCRIPT: Web Service Payload} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e since original {SCRIPT: Data} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e is referenced by one or more Universal Tasks.	Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Task (unless all references are included in the promotion payload).
Unable to promote {SCRIPT: Script} with name "Data1.txt" and id c78a9fe3748549808ac5f6248eb4bcc2 since original {SCRIPT: Data} with name "Data1.txt" and id 4d7d06e87aef4461aeabbb21191b4c61 is specified as a default value for one or more Universal Template Fields.	Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Template (via Universal Template Field).
Unable to promote {TASK: Application Control} with name " <application-name> #QUERY#" and id e9632e6024324d619b3122832e84c8b0 because a generated application control task cannot be promoted with a name change while applications are being excluded.</application-name>	Attempt to promote a generated Application Control Task with a name change while excluding Applications.
Universal Template " <template-name>" cannot be promoted because [it is a new template the template has changed] and the promotion was performed without the "Allow Universal Template Changes" option enabled. Universal Template changes must be promoted by a user with either the "ops_universal_template_admin" role or the "ops_admin" role and with the Allow Universal Template Changes option enabled.</template-name>	Attempt to promote a new or changed Universal Template without proper authorization or with proper authorization but without proper option usage.

Universal Template "<template-name>" cannot be promoted because [it is a new template | the template has changed] and the promotion user does not have either the "ops_universal_template_admin" role or the "ops_admin" role required to perform the promotion with the "Allow Universal Template Changes" option enabled.

Attempt to promote a new or changed Universal Template without proper authorization (on Promotion Target) but with proper option usage.

Preparing Bundles for Promotion

- Overview
 - Creating a Bundle for Promotion by Selecting Individual Records
 - Creating a Bundle for Promotion by Date
 - Creating a Bundle for Promotion by Business Services
 - Promoting Bundles by Business Service Membership
 - Bundle Details
- Adding and Removing Records in a Bundle
 - Adding and Removing Records from the Bundle Details
 - Adding a Record to a Bundle from the Record Details
 - Adding Multiple Records to a Bundle from a Records List
- Displaying the Bundles List for a Record
- Reports



Your user ID must have the ops_bundle_admin role to use this feature.

Overview

There are four methods of preparing a Bundle for promotion. Each method involves creating a Bundle and selecting records to be included in the Bundle.

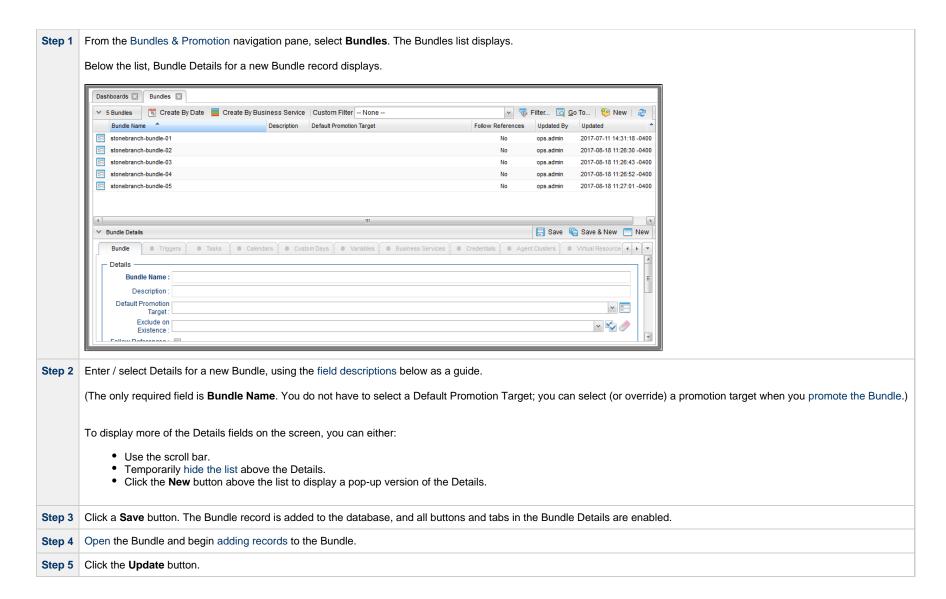
- 1. Select individual records to include in a Bundle.
- 2. Automatically create a Bundle, including all records of specified record types created or updated on or after a specified date, by Creating a Bundle for Promotion by Date.
- 3. Automatically create a Bundle, including all records of specified record types that are members of one or more specified Business Services, by Creating a Bundle for Promotion by Business Services.
- 4. Configure the Promote By Business Service Membership section of a Bundle to dynamically include all records belonging to one or more business services at the time of promotion.

For each method, you can manually add additional records to a Bundle after it has been created.

Any records explicitly added to a Bundle can be removed from the Bundle after it has been created. However, if the Promote By Business Service Membership feature is configured for a Bundle, all records that qualify based on Business Service membership at the time of promotion will be included.

Creating a Bundle for Promotion by Selecting Individual Records

You can select individual records to include in a Bundle promotion.





Note

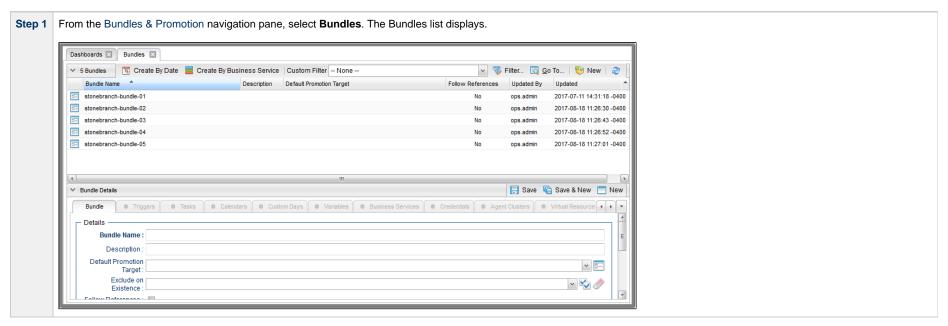
To open an existing record on the list, either:

- 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).

Creating a Bundle for Promotion by Date

This feature allows you to create a bundle for promotion based on a created (or updated) date. You select one or more types of records to be included in the bundle and a date. Any records that have been created or updated since the specified date that match the specified record type(s) will be included in the bundle.

The created bundle will have an Exclude on Existence field value based on the configuration of the Bundle Exclude On Existence Picker Default Universal Controller system property. To modify this and any other field, navigate to the Bundle Details of the created bundle.

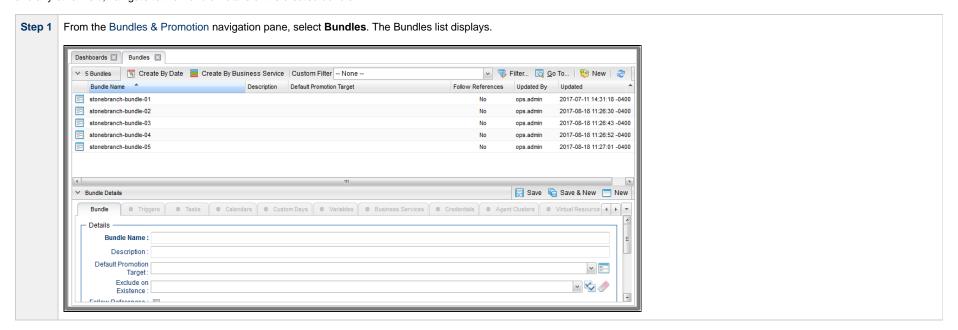


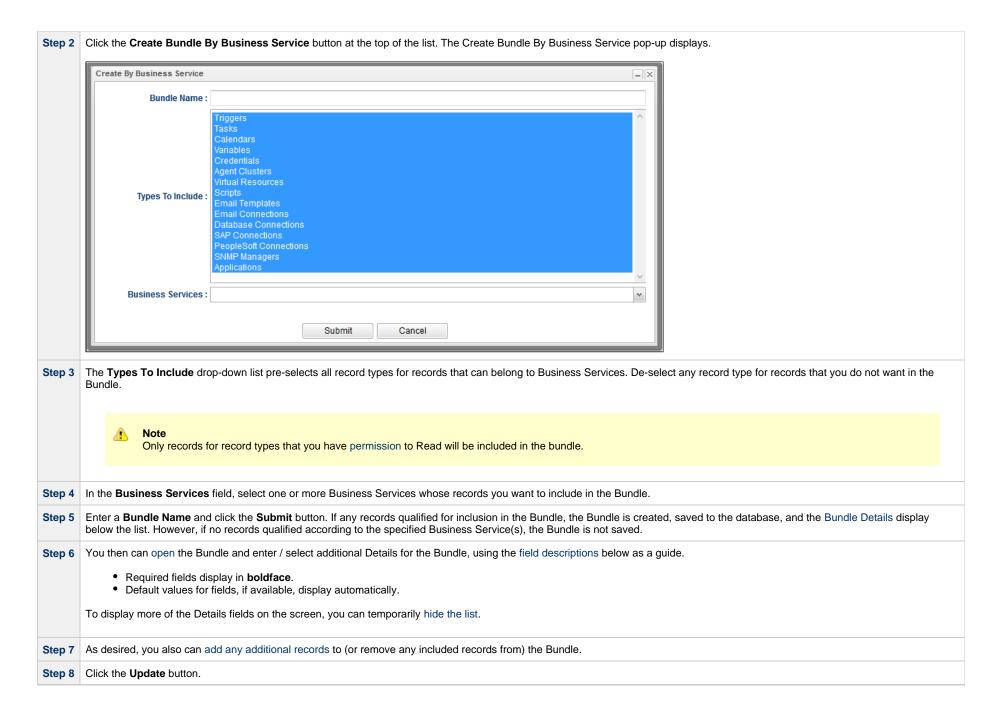
Step 2 Click the Create By Date button at the top of the list. The Create By Date pop-up displays. Create By Date **Bundle Name:** Credentials Types To Include: Scripts Email Templates **Email Connections** Database Connections SAP Connections PeopleSoft Connections SNMP Managers Create Bundle By Date 2018-05-04 00:00:00 -0400 Submit Cancel Step 3 The Types To Include drop-down list pre-selects all record types. De-select any record type for records that you do not want in the Bundle. Only records for record types that you have permission to Read will be included in the bundle. Step 4 The Create Bundle By Date field specifies the current date, by default. You can change the date manually or by clicking the Calendar icon. All records created or updated on or after the date that you specify will be included in the bundle. Step 5 Enter a Bundle Name and click the Submit button. If any records qualified for inclusion in the Bundle, the Bundle is created, saved to the database, and the Bundle Details display below the list. However, if no records qualified according to the specified date, the Bundle is not saved. Step 6 You then can open the Bundle and enter / select additional Details for the Bundle, using the field descriptions below as a guide. Required fields display in boldface. • Default values for fields, if available, display automatically. To display more of the Details fields on the screen, you can temporarily hide the list. Step 7 As desired, you also can add any additional records to (or remove any included records from) the Bundle. Step 8 Click the Update button.

Creating a Bundle for Promotion by Business Services

This feature allows you to create a bundle for promotion based on Business Service membership. You select one or more types of records to be included in the bundle and one or more Business Services of which individual records for those record types must be a member.

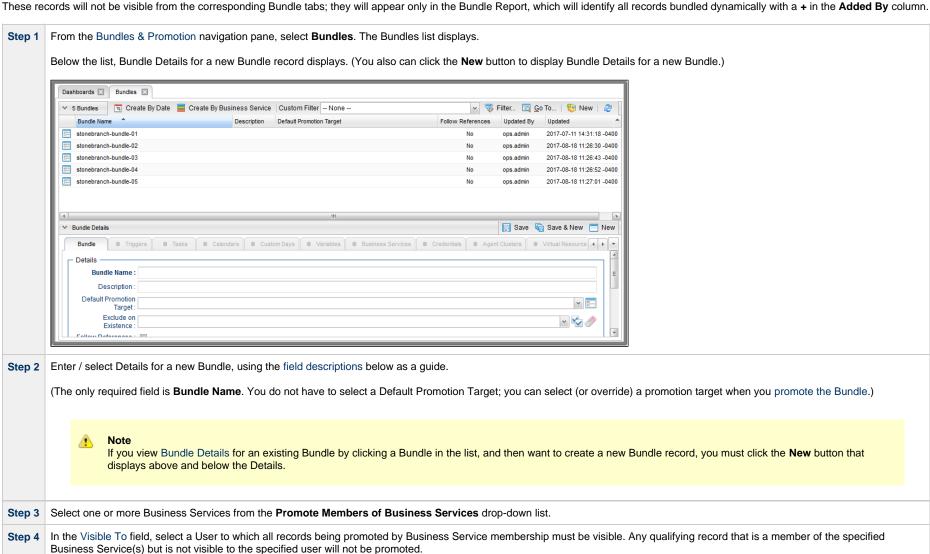
The created bundle will have an Exclude on Existence field value based on the configuration of the Bundle Exclude On Existence Picker Default Universal Controller system property. To modify this and any other field, navigate to the Bundle Details of the created bundle.





Promoting Bundles by Business Service Membership

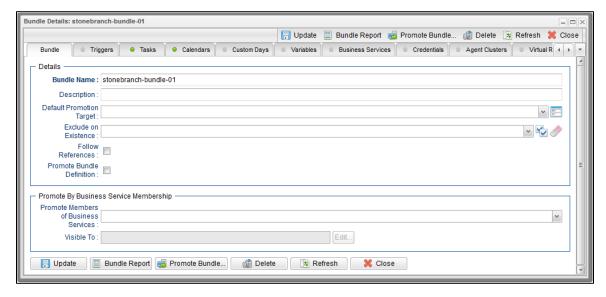
In addition to creating a Bundle for promotion by Business Services, you also can promote a Bundle by Business Service membership. When the Bundle is promoted, any record that is a member of one or more of the specified Business Services will be bundled dynamically - based on the current configuration of the system - during the promotion. These dynamically bundled records will be included in the promotion in addition to any records that you added to the Bundle statically.



Step 5	Click the Save button. If any records qualified for inclusion in the Bundle, the Bundle is created, saved to the database, and the Bundle Details display below the list. However, if no records qualified according to the specified Business Service(s), the Bundle is not saved. When the Bundle is promoted, all records that are members of the specified Business Services at the time of the promotion will be included in the promotion.
Step 6	As desired, you can open the Bundle and add any additional records to the Bundle.
Step 7	Click the Update button.

Bundle Details

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



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

Bundle Details Field Descriptions

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

Field Name	Description
Details	This section contains detailed information about the Bundle.
Bundle Name	Name for this bundle.

Promote Members of Business Services	Business Service(s) whose members will be included in the promoted Bundle.
Promote By Business Service Membership	This section contains detailed information for promoting the Bundle with records that are members of one or more Business Service and are visible to a specified user.
Promote Bundle Definition	Enable this option to promote the Bundle Details, along with the Bundle itself, when promoting the Bundle.
	(The information included is similar to the information included in an XML export with references.) See Records Promoted When Follow References is Selected or Not Selected.
Follow References	Specification for whether or not to dynamically include items that are referenced by bundled item definitions, including items being promoted as members of Business Services. For example, if you bundle an Email Task and enable the Follow References field, the Email Connection and/or Email Template referenced by the Email Task will be included in the promotion operation. If you bundle a Trigger and enable the Follow References option, the Task(s) and Calendar referenced by the Trigger will be included in the promotion. Tasks within a bundled Workflow are included in the promotion regardless of the Follow Reference option. Custom Days that are defined within a bundled Calendar are included in the promotion regardless of the Follow Reference option as well.
Exclude on Existence	Record types in the promotion payload that will not be updated if they exist on the target server. You can: Select one or more record types from the drop-down list. Click the double check mark icon to select all record types. Click the eraser icon to de-select all record types. For new Bundles, the Bundle Exclude On Existence Picker Default Universal Controller system property specifies which record types, if any, will be selected by default.
Default Promotion Target	Allows you to browse for and select a Promotion Target, which you defined using the Promotion Targets feature. If you do not specify a default promotion target, you will be prompted for a target when performing a promotion of the bundle.
Description	Description of this record. (Maximum = 200 characters.)



User to which all records being promoted by Business Service membership must be visible. Any qualifying record that is a member of the specified Business Service(s) but is not visible to the specified user will not be promoted.

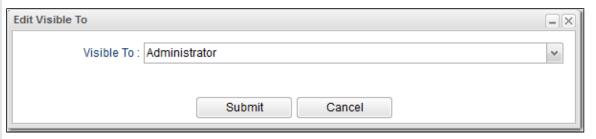


Notre

Records that are visible to a user are records that the user has permission to Read.

Default is the last user to update the Promote Members of Business Services field.

You can change the specified user by clicking the Edit button next to the Visible To field. An Edit Visible To pop-up dialog displays:



Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Bundle Details that let you perform various actions.
Save	Saves a new record in the Controller database.
Save & New	Saves a new record in the Controller database and redisplays empty Details so that you can create another new record.
Save & View	Saves a new record in the Controller database and continues to display that record.
New	Displays empty (except for default values) Details for creating a new record.
Update	Saves updates to the record.

Bundle Report	Allows you to generate a report about the current bundle. See Generating a Bundle Report.
Promote Bundle	Allows you to promote this bundle to a target Universal Controller server. See Promoting Bundles and Records to a Target.
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 record.
Tabs	This section identifies the tabs across the top of the Bundle Details that provide access to additional information about the Bundle.
<record type> tabs</record 	Each tab of the following record types lists the records of that type that belong to this Bundle. An Edit button on each record type list allows you to add records to and remove records from the Bundle (see Adding and Removing Records in a Bundle, below). Triggers Tasks Calendars Custom Days Variables Business Services Credentials Agent Clusters Virtual Resources Scripts Email Templates Email Templates Email Connections Database Connections SNMP Managers SAP Connections PeopleSoft Connections PeopleSoft Connections PeopleSoft Connections PeopleSoft Templates

Adding and Removing Records in a Bundle

If you want to select individual records for a Bundle promotion, you first must create and save a Bundle, which is empty of records until you manually add them.

If you selected a date for a Bundle promotion, the Bundle automatically contains records that were added or updated since the specified date, but you can manually add more records to the Bundle or remove any of the automatically added records from the Bundle.

If you selected Business Services Memberships for a Bundle Promotion, records that are members of the selected Business Services are not included in the Bundle until it is promoted. However, you can manually add additional records to the Bundle.

You can add a record to a Bundle from:

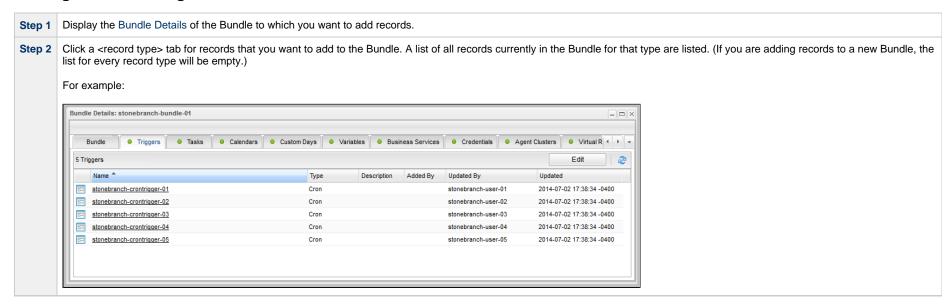
Bundle Details

- Record Details
- · Records List for the record

You can remove a record from a Bundle only from:

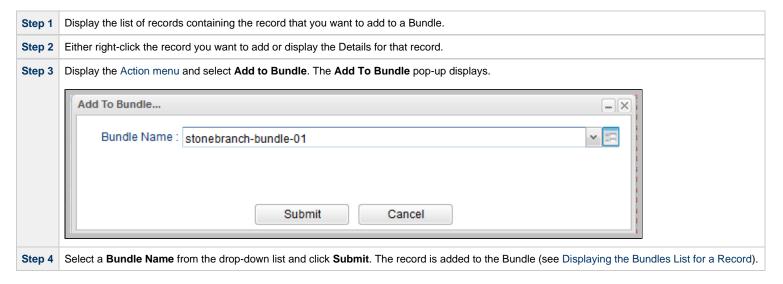
Bundle Details

Adding and Removing Records from the Bundle Details

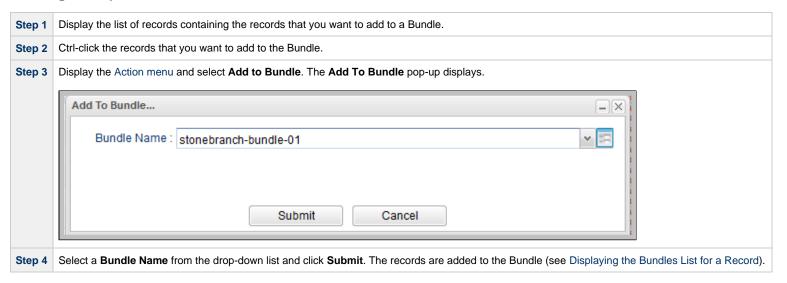


Step 3 Click the Edit button above the list. An Edit Members pop-up displays that allows you to add records to the Bundle. For example: **Edit Members** - - X Collection Triggers List stonebranch-bundle-01 stone Name * Name * stonebranch-applicationmonitortrigger-01 stonebranch-crontrigger-01 stonebranch-applicationmonitortrigger-02 stonebranch-crontrigger-02 stonebranch-applicationmonitortrigger-03 stonebranch-crontrigger-03 stonebranch-applicationmonitortrigger-04 stonebranch-crontrigger-04 stonebranch-applicationmonitortrigger-05 stonebranch-crontrigger-05 stonebranch-filemonitortrigger-01 + stonebranch-filemonitortrigger-02 **>>** stonebranch-filemonitortrigger-03 44 stonebranch-filemonitortrigger-04 stonebranch-filemonitortrigger-05 stonebranch-manualtrigger-01 stonebranch-manualtrigger-02 stonebranch-manualtrigger-03 stonebranch-manualtrigger-04 stonebranch-manualtrigger-05 Save Cancel • The Collection window displays all records of this type that have not been added to the Bundle. • The Tasks List window displays all records of this type that have been added to the Bundle. Step 4 To filter the records listed in the Collection window, enter characters in the text field above the Name column. Only records containing that sequence of characters will display in the list. Step 5 To add a record to the Bundle, move the records from the Collection window to the List window: 1. To move a single record, double-click it or click it once and then click the > arrow. 2. To move multiple records, Ctrl-click them and then click the > arrow. 3. To move all records, click the >> arrow. To remove a record from the Bundle, move the record from the List window to the Collection window: 1. To move a single record, double-click it or click it once and then click the < arrow. 2. To move multiple records, Ctrl-click them and then click the < arrow. 3. To move all records, click the << arrow. Step 6 Click Save. **Step 7** Repeat the above steps in the appropriate tabs for all records you want to add.

Adding a Record to a Bundle from the Record Details

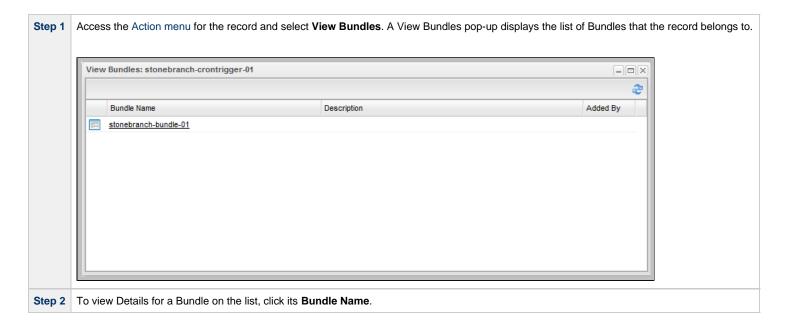


Adding Multiple Records to a Bundle from a Records List



Displaying the Bundles List for a Record

To display a list of Bundles that a record belongs to:



Reports

Universal Controller does not support the bundling and promotion of reports. Any report required by a promoted task must already be available on the target system.



Best Practice

We recommend that if you are sharing reports between systems:

- 1. Create the reports on the source system.
- 2. List Export the reports.
- 3. List Import the reports into the target system.

If an Email Task or an Email Notification action for any task type contains a reference to a specific report by id, the promotion payload will include report meta data to allow for proper validation and potential remapping of the report reference on the target system.

The meta data includes:

- · Report id
- Report title
- Report user name / user id
- · Report group name / group id

If a report by the same id exists on the target system, no UUID mapping is required and the promotion can proceed without issue.

If a report by the same id does not exist on the target system, UUID mapping is required before the promotion can proceed.

Using the report metadata, the Controller will attempt to find a report on the target system with the same title and same visibility.

- If a report is found, the incoming report id will be remapped to the appropriate target system report id.
- If a report is not found, the promotion will fail with the following message: Unable to find mapping on target system for report reference id report-id. {meta-data}.



Note

You can disable all Report-related promotion validation on the target system via the Validate Report References On Promotion Universal Controller system property.

Generating a Bundle Report

- Introduction
- Generating a Report

Introduction

A Bundle Report displays a list of all records included in a Bundle, categorized by record type.

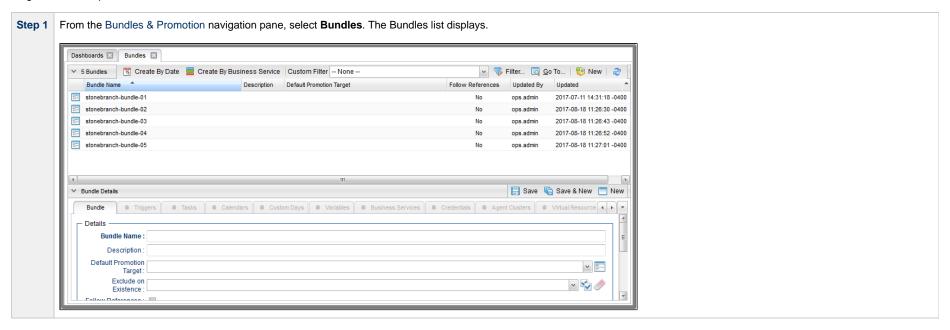


Note

Reports containing over 1,000 records will not be categorized by record type.

Generating a Report

To generate the report:



Step 2 Either right-click the Bundle that you want to create a Bundle Report for and click **Bundle Report** in the Action menu, or display the Details for the Bundle and click the **Bundle Report** button. A Bundle Report displays for that Bundle.





Note

Added By column information:

- Records included in the promotion that were added directly to the Bundle have a user id in the Added By column.
- Records included in the promotion dynamically as Tasks within a Workflow, Custom Days within a Calendar, or, when the Follow References field is enabled, the records referenced by the bundled records, have an asterisk (*) in the Added By column. (See Records Promoted When Follow References is Selected or Not Selected.)
- Records included in the promotion dynamically when the Bundle is promoted by Business Service membership have a plus sign (+) in the Added By column.

Step 3 If you want to print the report, click the **Print** button at the bottom of the report.

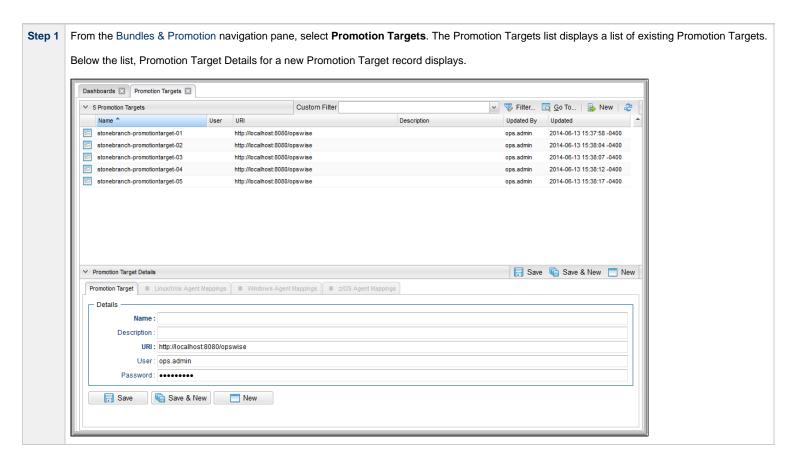
Universal Controller 6.5.x Bundles and Promotion

Creating Promotion Targets

- Creating a Promotion Target
- Promotion Target Details
 - Promotion Target Details Field Descriptions

Creating a Promotion Target

Before you can promote a Bundle (or individual record) to Universal Controller, you must create a Promotion Target record for a cluster node of that Controller. A Promotion Target record contains the Uniform Resource Identifier (URI) of a target cluster node and, optionally, the user name and password required to log on to the cluster node.



Step 2

Enter / select Details for a new Promotion Target, using the field descriptions below as a guide.

Required fields display in boldface.
Default values for fields, if available, display automatically.

To display more of the Details fields on the screen, you can either:

Use the scroll bar.
Temporarily hide the list above the Details.
Click the New button above the list to display a pop-up version of the Details.

Click a Save button. The Promotion Target record is added to the database, and all buttons and tabs in the Promotion Target Details are enabled.



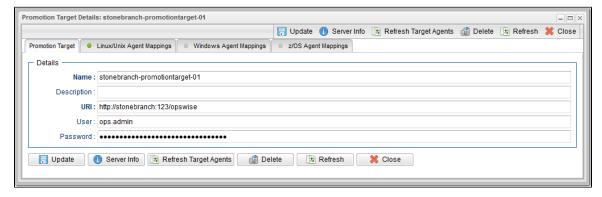
Note

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).

Promotion Target Details

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



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

Promotion Target Details Field Descriptions

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

Field Name	Description
Details	This section contains detailed information about the Promotion Target.
Name	Name for this Production Target.
Description	Description of this record. (Maximum = 200 characters.)
URI	Uniform Resource Identifier (URI) used to locate the Promotion Target cluster node.
	Note By default, the URI of the cluster node that you are logged into displays. You must change this to the URI of a target cluster node, using the default URI format.
User	Login ID on the target cluster node of Universal Controller.
Password	Login password on the target cluster node of Universal Controller.
Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Promotion Target Details that let you perform various actions.
Save	Saves a new record in the Controller database.
Save & New	Saves a new record in the Controller database and redisplays empty Details so that you can create another new record.
Save & View	Saves a new record in the Controller database and continues to display that record.
New	Displays empty (except for default values) Details for creating a new record.

Update	Saves updates to the record.
Server Info	Displays a Remote Server Information pop-up that contains details about the cluster node identified in this record.
Refresh Target Agents	Accesses the specified Universal Controller server and fetches all Agent records. For details, see Specifying Agent Mapping.
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 record.
Tabs	This section identifies the tabs across the top of the Promotion Target Details that provide access to additional information about the Bundle.
<agent-type> Mappings</agent-type>	Lists all Agent mapping instructions between the source and target Controllers. See Specifying Agent Mapping.

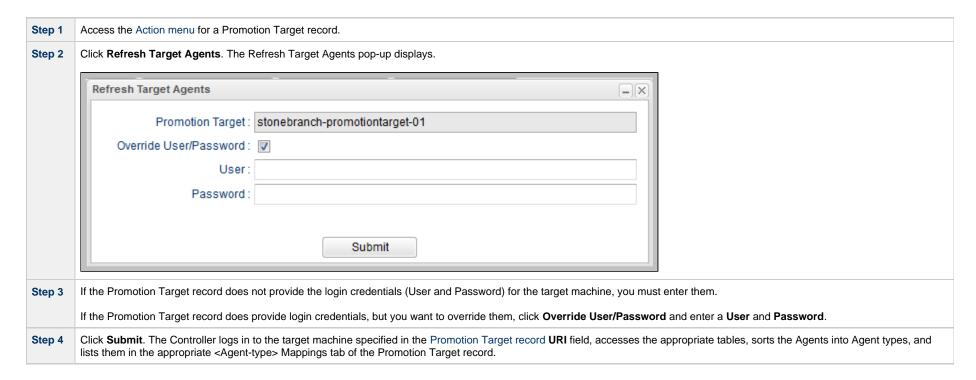
Specifying Agent Mapping

Specifying Agent Mapping

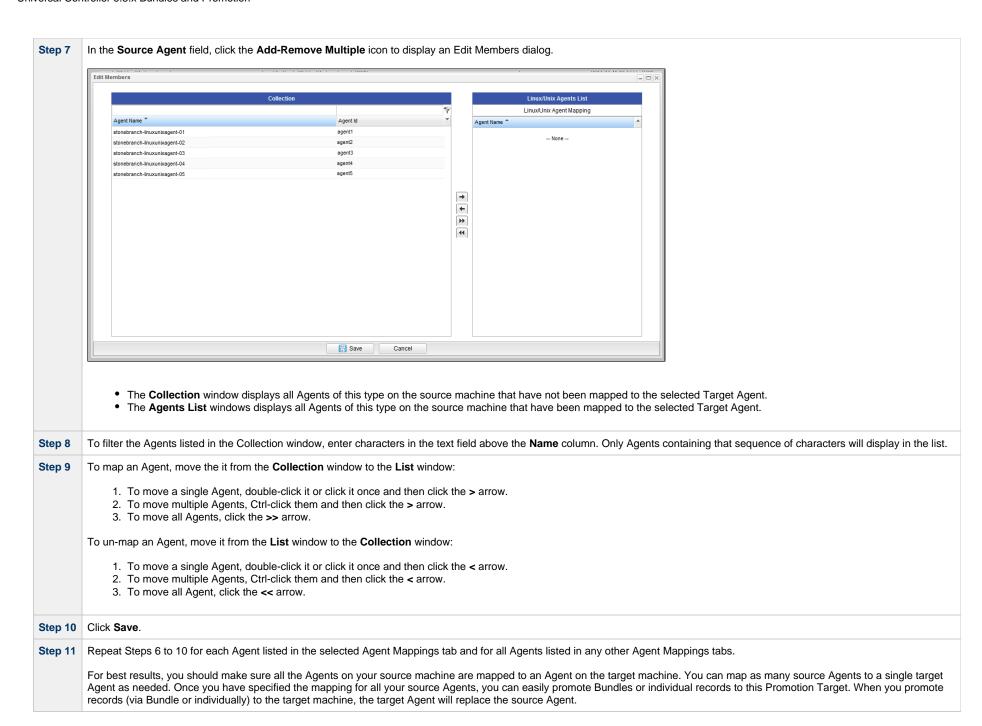
Because your source and target Controller machines may not have the same Agents, you must provide instructions to the Controller on how to map Agents on the source machine to Agents on the target machine.

The process consists of:

- Instructing the Controller to fetch the list of Agents on the target machine.
- Manually identifying how each Agent should be mapped.



Step 5 Open the Promotion Target record for which you have just refreshed Agents and click an Agent Mappings tab for which there are Agents on the target machine. The following example shows a list of Linux/Unix Agents on a target machine: Promotion Target Details: stonebranch-promotiontarget-01 - - X Promotion Target Linux/Unix Agent Mappings Windows Agent Mappings 2/OS Agent Mappings 2 0 Linux/Unix Agent Mappings Target Agent Source Agent stonebranch-linuxunixagent-03 Step 6 Click the Details icon next to a Target Agent name to display Agent Mapping Details for that Target Agent. Linux/Unix Agent Mapping Details - X 🔚 Update 🧃 Delete 🕼 Refresh 💥 Close Linux/Unix Agent Mapping Promotion Target: stonebranch-linuxunix-01 Target Agent: stonebranch-linuxunixagent-01 Type : Linux/Unix No items to show. Source Agent: 👸 Update 🏥 Delete 📑 Refresh 💢 Close



Refresh Agent Error Messages

If your setup is incorrect, you may see the error message described below.

If you tried to refresh target Agents using a non-existent user or invalid password on the Promotion Target:

r Message	Location
GET http://NN.NNN.NN.N:8080/opswise/resources/agents/list returned a response status of 401 Unauthorized	User interface on source machine
2012-03-29-16:27:17:134 ERROR [http-8080-6] com.sun.jersey.api.client.UniformInterfaceException: GET returned a response status of 401 Unauthorized	Universal Controller log on source machine
2012-03-29-16:27:16:138 ERROR [http-8080-1] *** ERROR *** Login using Basic Authentication failed for: [userID]	Universal Controller log on target machine

Promoting Bundles and Records to a Target

- Overview
- Promoting a Bundle
- Scheduling a Bundle Promotion
- Promoting One or More Individual Records
- Promoting Universal Tasks and Universal Templates
- Diagnosing Promotion Failures
- Promotion Audit Records



To use this feature, the user logged into the source Controller must have the ops_promotion_admin role.

The Promotion Read Permission Required Universal Controller system property specifies whether or not the ops_promotion_admin role additionally requires Read permission, on the source Universal Controller, for any record type being promoted.

Also, the user ID and password specified for the Promotion Target must be for a valid user on the target Controller with the ops_promotion_admin role.

The Promotion Accept Bundle Create/Update Permission Required Universal Controller system property specifies whether the ops_promotion_admin role additionally requires Create (or Update) permission, on the target Universal Controller, for any record type being promoted.

Overview

Promoting a Bundle means copying all of the records in a Bundle from a source Controller to a target Controller.

You also can promote one or more individual records without bundling them.

For every record in a bundle being promoted, and every record being promoted individually, the following associated data is always included in the promotion.

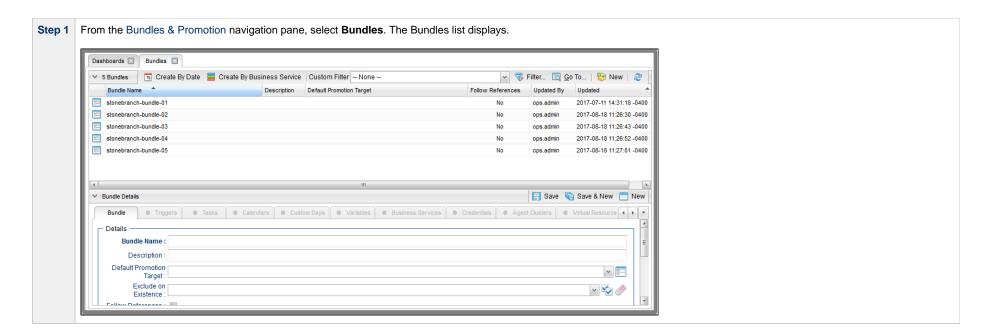
- If you promote a workflow, all of the tasks in the workflow are also promoted.
- If you promote a task (including a workflow), all variables, virtual resource dependencies, actions, notes, etc. are included in the promotion.
- If you promote an application, its associated start, stop, and query tasks are included in the promotion.
- If you promote a calendar, its associated custom days are included in the promotion.



Note

If you promote a trigger whose Forecast field has been checked so that the Controller calculates the date and time when this trigger will be satisfied for the next number of days, the Forecast field will not be checked for that trigger on the target system.

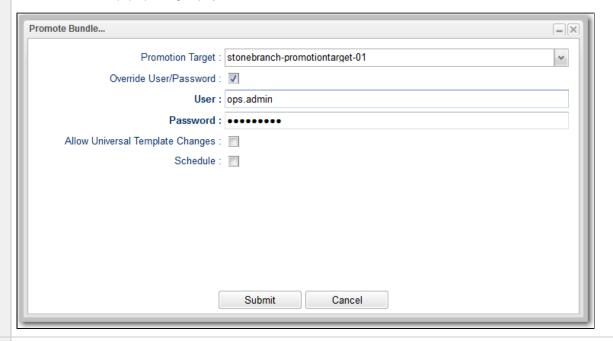
Promoting a Bundle



Step 2 Locate the Bundle that you want to promote and either:

- Right-click the Bundle on the list to display an Action menu and click Promote Bundle....
- Open the Bundle record and either click the Promote Bundle... button or access the Action menu and click Promote Bundle...

The Promote Bundle pop-up dialog displays.



- Step 3 If the selected Bundle record specifies a Default Promotion Target, the name of that Target displays in the Promotion Target field. You can change the Promotion Target by selecting any Target from the drop-down list.
- Step 4 The default login User and Password are provided from the selected Promotion Target record. If you want to override the defaults, click **Override User/Password** and type in the new information.
- Step 5 If the promotion contains new or modified Universal Templates, click Allow Universal Template Changes; otherwise, the promotion will not succeed. See Diagnosing Promotion Failures for details.
- **Step 6** If you want to schedule the promotion of the bundle at a later time, click **Schedule**.



The Controller logs in to the target machine specified in the URI field of the Promotion Target record and copies the bundled records to the target Controller. Based on the specified Agent mapping, the target Agent replaces the source Agent where required.

If you scheduled the promotion to be run at a later time, a record of the promotion is created in the Promotion Schedules list.

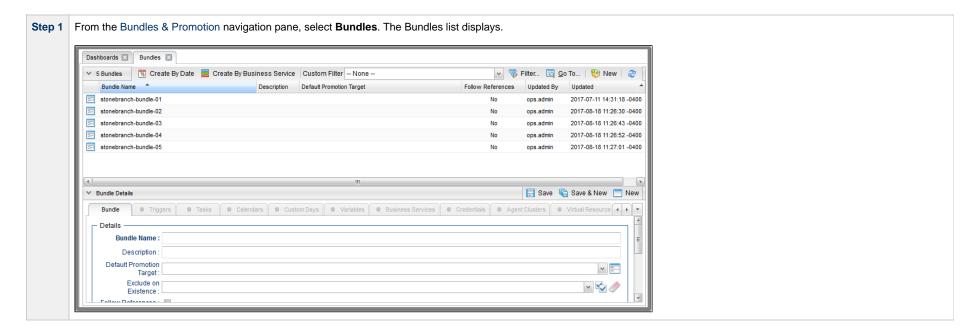


Note

The promotion process creates audit records on the source and target machine. On the target machine, the Controller also creates a Promotion History record. For details, see Promotion History and the Restore Option.

Scheduling a Bundle Promotion

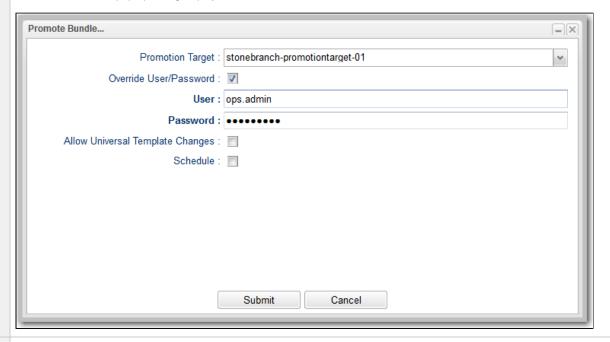
You can create a promotion schedule for a Bundle so that it will automatically be promoted at a specified date and time.



Step 2 Locate the Bundle that you want to promote and either:

- Right-click the Bundle on the list to display an Action menu and click Promote Bundle....
- Open the Bundle record and either click the **Promote Bundle...** button or access the Action menu and click **Promote Bundle...**

The Promote Bundle pop-up dialog displays.



- Step 3 The default login ID and password are provided from the Promotion Target record, if specified. If you want to override the default, click **Override User/Password** and type in the new information.
- Step 4 If the promotion contains new or modified Universal Templates, click **Allow Universal Template Changes**; otherwise, the promotion will not succeed. See Diagnosing Promotion Failures for details.

Step 5 Click Schedule. Additional fields display on the Promote Bundle pop-up dialog that let you create a promotion schedule. Promote Bundle... - X Promotion Target stonebranch-promotiontarget-01 v Override User/Password: User: ops.admin Password: Allow Universal Template Changes : I Schedule: V Date: 2016 Min Time: Create Snapshot: System Notification : Operation Failure Submit Cancel **Step 6** Select a **Date** and **Time** when you want the bundle to be promoted. Step 7 If you want to schedule the promotion using the current Bundle records, select Create Snapshot. When you submit the schedule, the current Bundle records are collected immediately and promoted at the scheduled time. Any changes to Bundle records between the time that the promotion was scheduled and the time that the promotion was performed are not promoted. If you want to schedule the promotion using the Bundle records collected dynamically at the time of the scheduled promotion, do not select Create Snapshot. Step 8 If you want to send a System Notification on the success and/or failure of the promotion, select one of the following from the System Notification drop-down list: Operation Failure (default) Operation Success/Failure Operation Success If you do not want to send a System Notification, select - None --. Promotions without a specified Schedule will run immediately. Real-time notifications will be displayed in the Universal Automation Center Console, rather than through System Notifications.

Step 9 Click Submit. A record of the promotion schedule is listed in the Promotion Schedules list.

After a scheduled promotion has completed, it will remain on the list (where it can be rescheduled to run again) for the number of days specified by the Promotion Schedule Retention Period In Days Universal Controller system property.

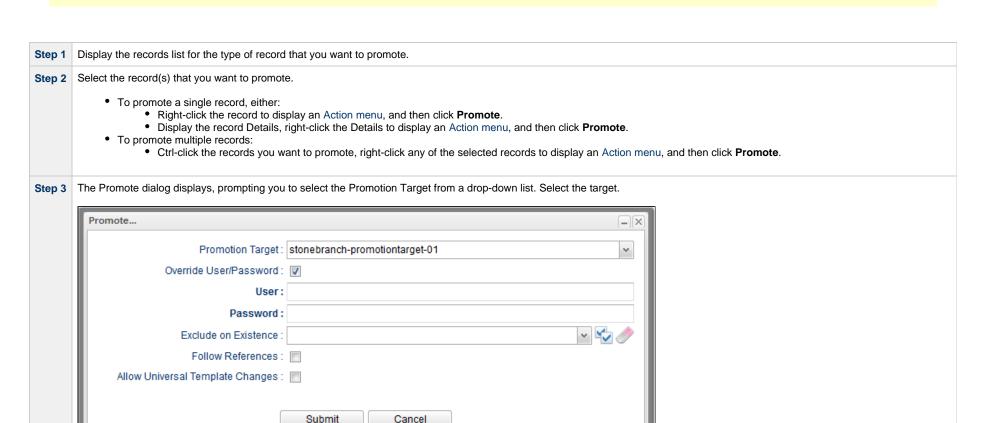
Promoting One or More Individual Records

The Controller also allows you to promote records of the same type to a target machine without going through the process of creating a Bundle.



Note

You can only create a Promotion Schedule for a Bundle of records, not one or more individual records.



Step 4 The default login ID and password will be provided from the Promotion Target record. If you want to override the default, click Override User/Password and type in the new information.

Step 5	Select Exclude on Existence if you want to specify record types in the promotion payload that will not be updated if they exist on the target payload. You can:
	 Select one or more record types from the drop-down list. Click the double check mark icon to select all record types. Click the eraser icon to de-select all record types.
	The Bundle Exclude On Existence Picker Default Universal Controller system property specifies which record types, if any, will be selected by default in the drop-down list.
Step 6	Select Follow References if you want to dynamically include records that are referenced by these records. (See Records Promoted When Follow References is Selected or Not Selected.)
Step 7	If the promotion contains new or modified Universal Templates, click Allow Universal Template Changes ; otherwise, the promotion will not succeed. See Diagnosing Promotion Failures for details.
Step 8	Click Submit . The Controller logs in to the target machine specified in the URI field of the Promotion Target Record and copies the selected records to the target machine.

This process creates audit records on the source and target machines. On the target machine, the Controller also creates a Promotion History record.

Promoting Universal Tasks and Universal Templates

The following conditions apply for the promotion of Universal Tasks and Universal Templates:

Subject	Condition
Universal Template	For any Universal Task included in a promotion, its corresponding Universal Template automatically will be included in the promotion.
Universal Template Changes	In order to promote a new Universal Template or a Universal Template change, the promotion must be performed with the Allow Universal Template Changes field enabled on the Promote Bundle dialog or the Promote dialog; otherwise, the promotion will fail. See Diagnosing Promotion Failuress for details.
	The Allow Universal Template Changes field is visible on each dialog only if the user has the ops_admin role role or the ops_universal_template_admin role, and at least one Universal Template is configured within the source system.
Universal Template Changes	Universal Template changes will be listed under under Non-Restorable Items in the Promotion History Report.
Change Restrictions	All Restrictions on Universal Template Changes apply to any change(s) being applied on a target system with a promotion.
Promotion Failure	Any promotion that includes a Universal Task and/or a Universal Template will fail if the target system is not Universal Controller 6.4.0.0 or later.
Promotion Restore	 Any promotion that includes Universal Template changes cannot be restored using the Restore Unchanged or Restore All operations of Promotion History. Promotion History for the promotion will be flagged as not restorable; the Can Restore field in the Promotion History Details for the promotion will not be selected. Any Universal Template change will be recorded as a Promotion History Item, where the New Version, Previous Version, and Source Version fields are blank.
Follow References	If the Follow References field is enabled for a promotion, the following references are followed for Universal Templates: Agent Cluster (or Broadcast Cluster), Credentials, and Credential Field Type (if a default value has been defined). See Records Promoted When Follow References is Selected or Not Selected.
Follow References	If the Follow References field is enabled for a promotion, the following references are followed for Universal Tasks: Agent Cluster (or Broadcast Cluster), Credentials, and any fields that match a Universal Template Credential Field Type, in additional to the references inherited by all Task Types. See Records Promoted When Follow References is Selected or Not Selected.

Child Audit	For any promoted Universal Template change, a child audit captures the Universal Template Properties, Fields, and Field Choices in the Before, After, and Difference fields.
Child Audit	For any promoted Universal Task, a child audit captures the Before, After, and Difference fields based on the original, incoming, and combination of original and incoming Universal Templates, respectively.

Diagnosing Promotion Failures

The following error messages are provided for various promotion failure scenarios.



Note

For a Bundle promotion, the beginning of each error message is: Promotion of bundle "bundle-name" failed with the following error(s):

For a Bundle-less promotion, the beginning of each error message is: Promotion failed with the following error(s):

Error Message	Diagnosis
Acceptance of bundle " <bundle-name>" from <node-id> prohibited because a payload from a bundle with the same name is currently being processed by another Universal Controller process.</node-id></bundle-name>	Accept Bundle command invoked on the target for a bundle with a bundle name for which another Universal Controller process has already acquired a lock.
Cluster node information could not be determined for the promotion target because the host is unknown (hostname).	Invalid hostname.
Cluster node information could not be determined for the promotion target (Connection refused: connect).	Valid hostname, but no service to accept the connection.
Cluster node information could not be determined for the promotion target because the Web Service is unavailable; the target Universal Controller may still be initializing.	Attempt to promote to a target Universal Controller that is still initializing (starting up).
Cluster node information could not be determined for the promotion target because the user is not authorized; please verify the promotion target user and password.	Invalid user name and/or password.
Cluster node information could not be determined for the promotion target because the user is not authorized for Web Service Access; please verify the promotion target user has Web Service Access enabled.	Valid user name and password, but the user is not authorized for Web Service Access.
Cluster node release level for the promotion target could not be determined and one or more items being promoted require a minimum release level of 6300.	Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.
Cluster node release level for the promotion target is 6xxx, which does not meet the required release level of 6xxx.	Attempt to promote a definition, or a definition using a particular feature, that is not recognized by the promotion target.
	This message will be followed by one or more messages detailing the specific definition, or the specific feature used by a definition that is not recognized by the promotion target.
Command Accept Bundle prohibited due to security constraints.	Valid user name and password, but the user is not authorized for the Accept Bundle command, which requires the ops_promotion_admin role.

Command Accept Bundle prohibited due to security constraints. User on target server requires "ops_bundle_admin" role if "Promote Bundle Definition" option is enabled.	Valid user name and password, but the user is not authorized for the Accept Bundle command with the Promote Bundle Definition option enabled, which requires both the ops_promotion_admin role and the ops_bundle_admin role.*
Command Promote (or Promote Bundle) has been routed to the Active server and continues to run in the background.	Promote (or Promote Bundle) command was issued to a Passive server and routed to the Active server, where the Promote (or Promote Bundle) command will run, however, the Promote (or Promote Bundle) command did not complete within approximately 2 minutes.
	The Promote (or Promote Bundle) command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.
Credential " <credential-name>" cannot be promoted because web service credentials are not permitted; Universal Controller property Web Service Credentials Permitted is not enabled.</credential-name>	Attempt to promote to a target Controller where the Web Service Credentials Permitted Universal Controller system property is set to false.
Promoted {EMAIL CONNECTION: Incoming} with name "Gmail" and id 04e5e1074c1f42908d9b3f62f36fff50 is a different type than the original {EMAIL CONNECTION: Outgoing} with name "Gmail" and id 195fc662df8447dc90dec02ea8be0cb4	Attempt to promote an Incoming email connection type and the email connection on the target system is an Outgoing email connection type.
Promoted {EMAIL CONNECTION: Outgoing} with name "Gmail" and id ab36222512cf4ae4afa7e59a8ccbd684 is a different type than the original {EMAIL CONNECTION: Incoming} with name "Gmail" and id a037048f7c4b4e3f9e8691e3f664e5a7	Attempt to promote an Outgoing email connection type and the email connection on the target system is an Incoming email connection type.
Promoted {TASK: Universal} with name "ABC", id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e318 has a different universal template id than the original "ABC" with id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e319.	Attempt to promote a Universal Task with an associated Universal Template that is not equivalent to the Universal Template associated with the target Universal Task.
Promoted {TASK: Universal, TaskUniversalBean} with name "ABC" and id 8ee785079fcc4142873486e921bfe789 is a different type and/or class than the original {TASK: Timer, TaskSleepBean} with name "ABC" and id dfbd23df8ab24b2a9a0891ae2f8ca22f.	Attempt to promote any item of a specific type (or Java class) that matches another item of a different type (or Java class).
Promotion of bundle " <bundle-name>" with id <bundle-uuid> prohibited because the bundle is in use by another Universal Controller process.</bundle-uuid></bundle-name>	Promote Bundle command invoked on the source for a bundle with a bundle id for which another Universal Controller process has already acquired a lock.
Promotion Schedule operation for bundle " <bundle-name>" with id <bundle-uuid> prohibited because the bundle is in use by another Universal Controller process.</bundle-uuid></bundle-name>	Schedule Promotion command requires the bundle id lock, but another Universal Controller process has already acquired that lock.
Promotion target "promotion-target-name" has routed the promotion payload to the Active server and the Accept Bundle command continues to run in the background.	Upon receiving the promotion payload, the promotion target determined it was a Passive server and routed the payload to the Active server, where the Accept Bundle command will run, however, the Accept Bundle command did not complete within approximately 2 minutes.
	The Accept Bundle command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.
Promotion to an earlier release only supported for target releases starting with 6300.	Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.
SAP Task " <job-id-field-name>" requires a minimum promotion target release level of 6450 when unspecified.</job-id-field-name>	Attempt to promote an SAP Task with an unspecified SAP Job ID field to a pre-6.4.5.0 release of the Controller.
Script " <script-name>" cannot be promoted because scripts are not permitted; Universal Controller property "Windows/Linux Scripts Permitted" is not enabled.</script-name>	Attempt to promote a Script Script Type from a source server to a target server, where the target server is configured with the Windows/Linux Scripts Permitted Universal Controller system property set to false.

Unable to promote {APPLICATION: Windows Service} with name " <application-name>" and id 0f84fbb388c04bd09a2c7d5a0ac06c70 because an application cannot be promoted with a name change while generated application control tasks are being excluded.</application-name>	Attempt to promote an Application with a name change while excluding generated Application Control Tasks.
Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is referenced by one or more Universal Tasks.</credential-name></credential-type>	Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Task requires it to remain a Resolvable type.
Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is specified as a default value for one or more Universal Template Fields.</credential-name></credential-type>	Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Template Field default value requires it to remain a Resolvable type.
Unable to promote <credential-type> credential "<credential-name>" since original Web Service credential is referenced by one or more Web Service Tasks.</credential-name></credential-type>	Attempt to promote a Credential that has been converted from a Web Service type and at least one reference on the target system by a Web Service Task requires it to remain a Web Service type.
Unable to promote {CUSTOM DAY} with name " <custom-day-name>" and id 343f68c60cef48279647a45055349c47 because global custom days are not permitted; Universal Controller property "Custom Day Global Permitted" is not enabled.</custom-day-name>	Attempt to promote a global Custom Day when the Custom Day Global Permitted system property is set to false .
Unable to promote {SCRIPT: Web Service Payload} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e since original {SCRIPT: Data} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e is referenced by one or more Universal Tasks.	Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Task (unless all references are included in the promotion payload).
Unable to promote {SCRIPT: Script} with name "Data1.txt" and id c78a9fe3748549808ac5f6248eb4bcc2 since original {SCRIPT: Data} with name "Data1.txt" and id 4d7d06e87aef4461aeabbb21191b4c61 is specified as a default value for one or more Universal Template Fields.	Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Template (via Universal Template Field).
Unable to promote {TASK: Application Control} with name " <application-name> #QUERY#" and id e9632e6024324d619b3122832e84c8b0 because a generated application control task cannot be promoted with a name change while applications are being excluded.</application-name>	Attempt to promote a generated Application Control Task with a name change while excluding Applications.
Universal Template " <template-name>" cannot be promoted because [it is a new template the template has changed] and the promotion was performed without the "Allow Universal Template Changes" option enabled. Universal Template changes must be promoted by a user with either the "ops_universal_template_admin" role or the "ops_admin" role and with the Allow Universal Template Changes option enabled.</template-name>	Attempt to promote a new or changed Universal Template without proper authorization or with proper authorization but without proper option usage.
Universal Template " <template-name>" cannot be promoted because [it is a new template the template has changed] and the promotion user does not have either the "ops_universal_template_admin" role or the "ops_admin" role required to perform the promotion with the "Allow Universal Template Changes" option enabled.</template-name>	Attempt to promote a new or changed Universal Template without proper authorization (on Promotion Target) but with proper option usage.

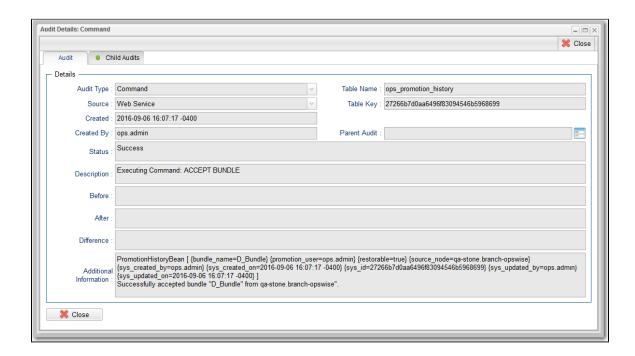
Promotion Audit Records

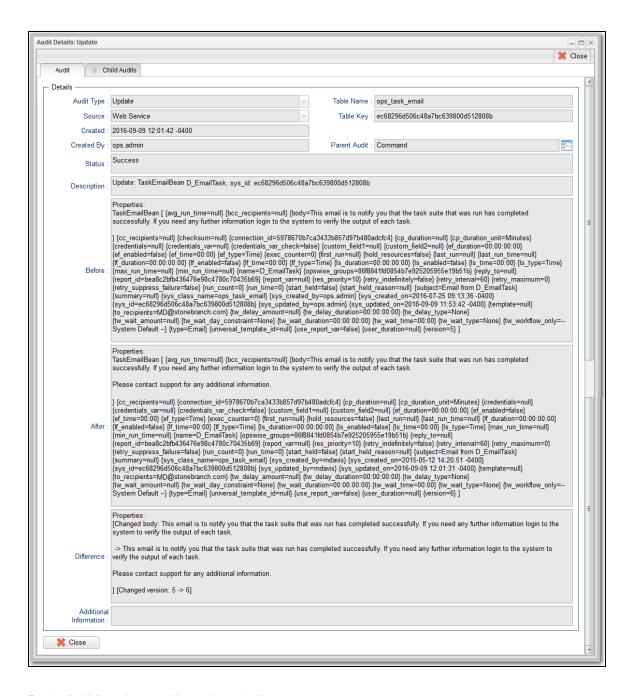
Whenever a Bundle or an individual record is promoted to a target machine, the Controller creates audit records on both the source and target machines.

On the source machine, each time you promote a record or a Bundle, the Controller creates a single audit record for that event. If you promoted a Bundle, the audit description is PROMOTE BUNDLE; if you promoted a single record or multiple records, the audit description is PROMOTE.

On the target machine, the Controller creates an ACCEPT BUNDLE audit record, along with child audit records associated with that promotion (either record[s] or a Bundle). These may include UPDATE commands for records that existed on the target already and CREATE commands for records that did not previously exist.

The following examples show an ACCEPT BUNDLE record on a target machine and a Child Audit record for a task included in the Bundle promotion.





For detailed information on audit record, see Audits.

Universal Controller 6.5.x Bundles and Promotion

Promotion Schedules

- Overview
- Viewing Promotion Schedule Details
- Promotion Schedule Details Field Descriptions
- Modifying and/or Rescheduling a Promotion Schedule
- Modifying and/or Rescheduling a Successfully Promoted Promotion Schedule
- Cancelling a Promotion Schedule

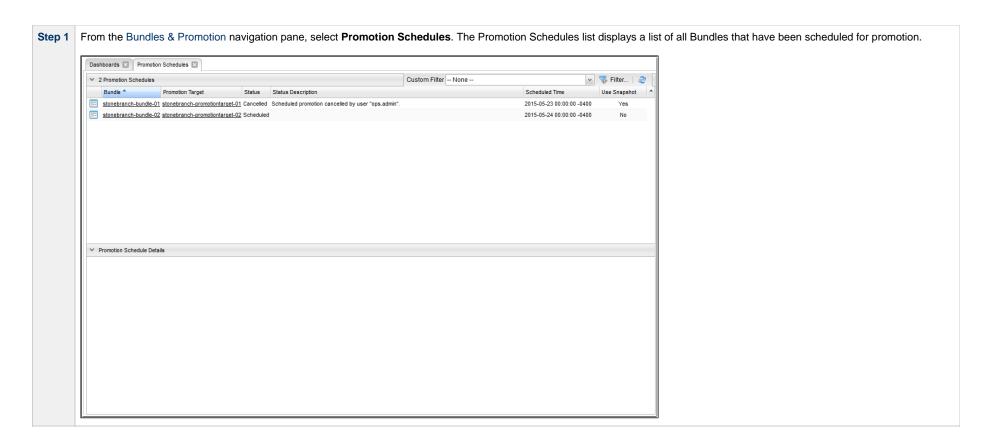
Overview

If you schedule a promotion to be run at a later time on the Promote Bundle... dialog, the Controller creates a record for that promotion.

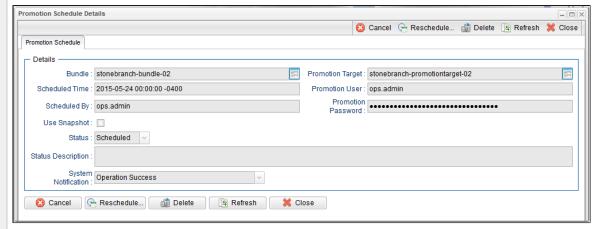
The Promotion Schedules list identifies all scheduled promotions.

It also lists all scheduled promotions that have completed (where they can be rescheduled to run again) for the number of days specified by the Promotion Schedule Retention Period In Days Universal Controller system property.

Viewing Promotion Schedule Details



Step 2 Click the Details icon next to a Promotion Schedule in the list, or click anywhere in the Promotion Schedule row, to display Details for that Promotion Schedule.



Although all of the fields in the Promotion Schedule Details display as read-only, you change the values of all fields (except **Status** and **Status Description**) by clicking the **Reschedule...** button (see Modifying and/or Rescheduling a Promotion Schedule, below).

See the field descriptions, below, for details about all fields in the Promotion Schedule Details.

Promotion Schedule Details Field Descriptions

The following table describes the fields and buttons in the Promotion Schedule Details.

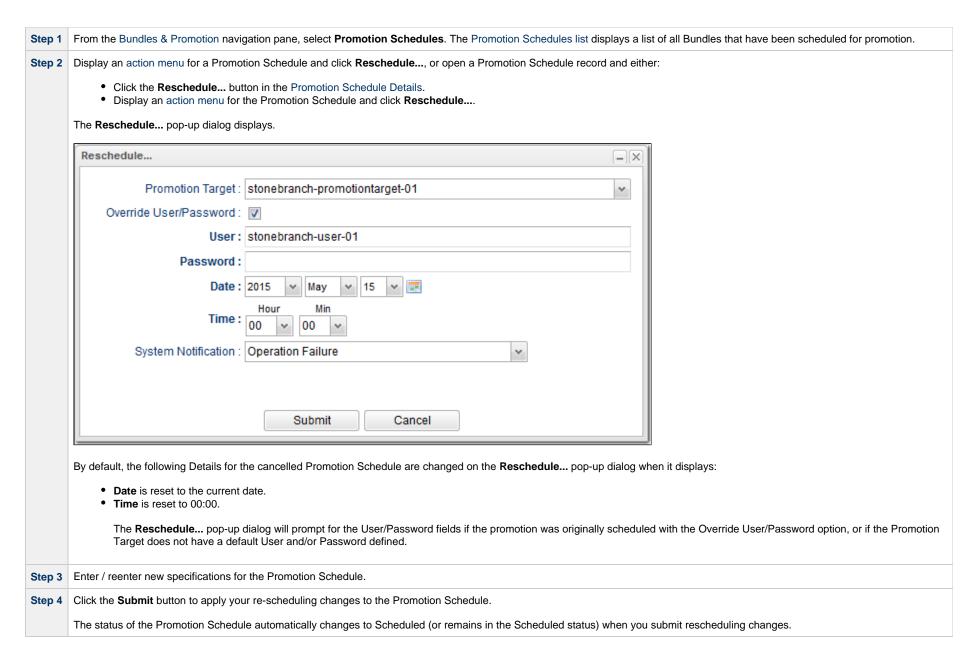
Field Name	Description
Details	This section contains detailed information about the scheduled promotion.
Bundle	Name of the Bundle scheduled for promotion.
	You can click the icon next to the Bundle name to view (and edit) the Details for that Bundle.
Scheduled Time	Date and time the bundle is scheduled for promotion.
Schedule By	User Id of the user that scheduled the promotion of the bundle.
Promotion Target	Cluster Node of a Universal Controller to which the Bundle is scheduled for promotion.
	You can click the icon next to the Promotion Target name to view (and edit) the Details for that Promotion Target.
Promotion User	User Id of the promotion user that the scheduled promotion will use to promote the bundle.
Promotion Password	Password of the promotion user that the scheduled promotion will use to promote the bundle.
Use Snapshot	Indication of whether or not the promotion is scheduled to be performed using a snapshot of the Bundle records taken at the time the promotion was scheduled.

Status	System-defined; Current status of this Promotion Schedule.
	Values:
	 Scheduled Cancelled Running Failure Promoted
Status Description	System-defined; Description of the current Status .
System Notification	Options for when a System Notification will be sent.
	Options:
	 None Operation Failure Operation Success/Failure Operation Success
Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Promotion Schedule Details that let you perform various actions.
Cancel	Changes a scheduled promotion Status from Scheduled to Cancelled.
Reschedule	Allows you to edit the Promotion Schedule Details (see Modifying and/or Rescheduling a Promotion Schedule, below).
Delete	Cancels and deletes the Promotion Schedule; Delete is prohibited while Status is Running.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of these Details.

Modifying and/or Rescheduling a Promotion Schedule

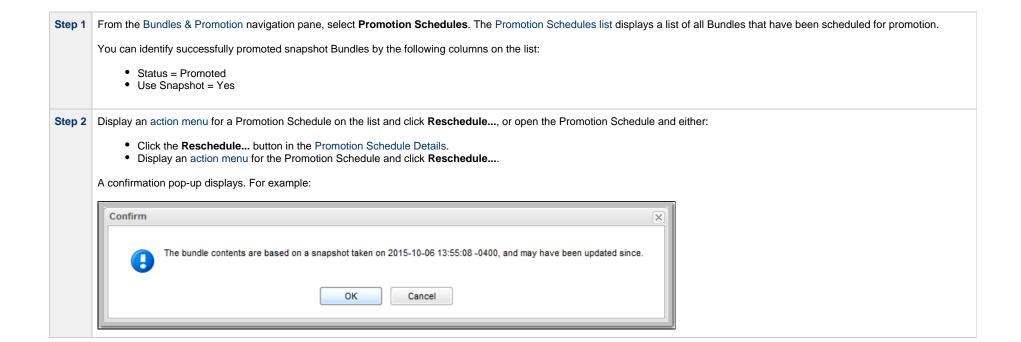
You can modify and/or reschedule a Scheduled, Cancelled, or Failed promotion schedule.

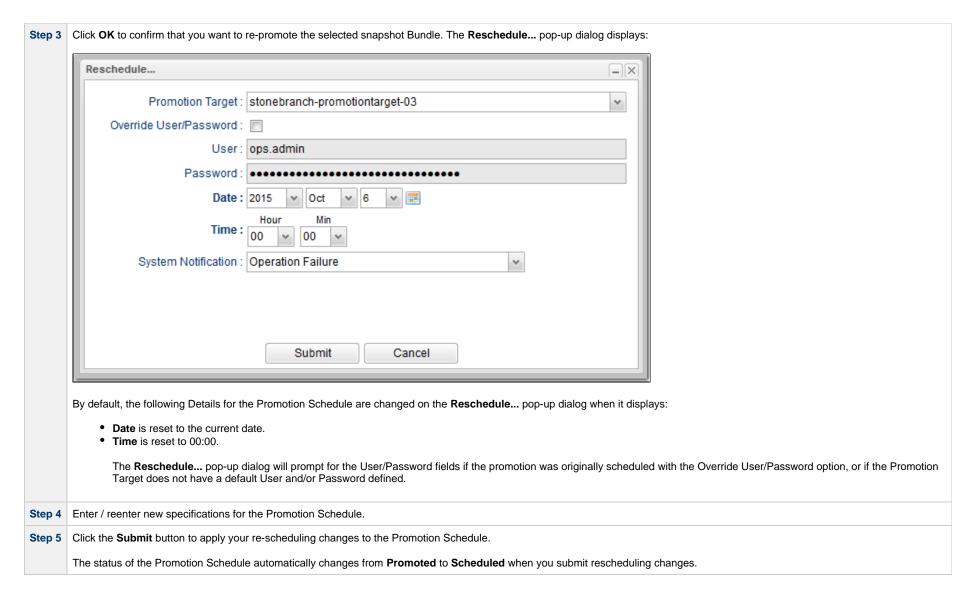
For modifying and/or rescheduling a successfully promoted promotion schedule, see Modifying and/or Rescheduling a Successfully Promoted Promotion Schedule.



Modifying and/or Rescheduling a Successfully Promoted Promotion Schedule

You can modify and/or reschedule a successfully promoted promotion schedule only if the promotion schedule was specified to use a snapshot.





Cancelling a Promotion Schedule

You can cancel a Promotion Schedule without deleting its Promotion Schedule record.

Cancelled Promotion Schedule records will continue to be listed on the Promotion Schedules list.

Step 1	From the Bundles & Promotion navigation pane, select Promotion Schedules . The Promotion Schedules list displays a list of all Bundles that have been scheduled for promotion.
Step 2	Display an action menu for a Promotion Schedule on the list and click Cancel , or open the Promotion Schedule and either:
	 Click the Cancel button. Display an action menu for the Promotion Schedule and click Cancel. The Status of the Promotion Schedule in the Promotion Schedule list will change from Scheduled to Cancelled, and a Status Description for that cancelled Promotion Schedule will
	display.

To reschedule a **Cancelled** Promotion Schedule, see Modifying and/or Rescheduling a Promotion Schedule.

Promotion History and the Restore Option

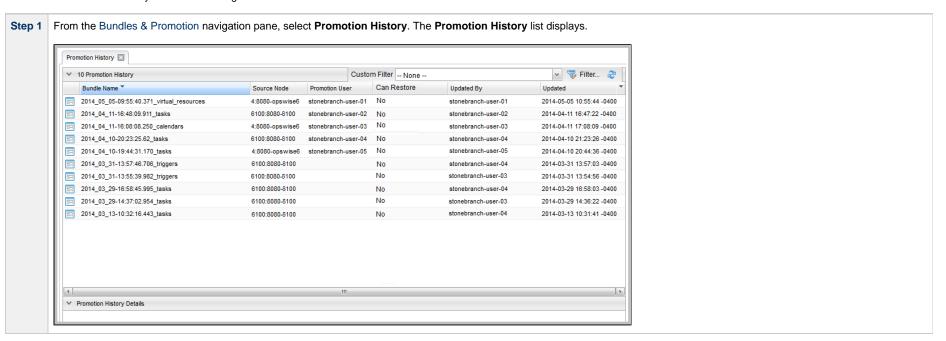
- Overview
- Accessing Promotion History Records
- Promotion History Details Field Descriptions

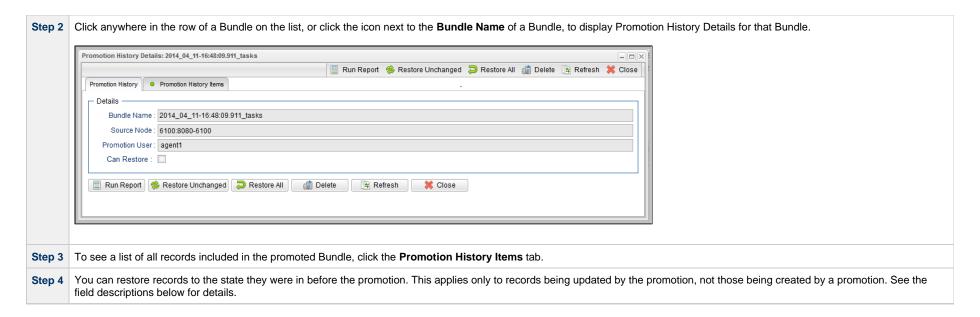
Overview

The Controller creates a Promotion History record each time a Bundle (or record) is promoted to a target Controller.

Accessing Promotion History Records

To access a Promotion History record on the target Controller:





Promotion History Details Field Descriptions

The fields on the Promotion History Details are system-supplied and read-only.

Field Name	Description
Details	This section contains detailed information about the promoted Bundle (or record).
Bundle Name	Name of this record.
Source Node	Machine name or URI of the machine where the source Universal Controller system is running.
Promotion User	User ID of the user who promoted the bundle or record(s).

Can Restore

Specification for whether or not records in the bundle that already existed on the target server can be restored to their state prior to the promotion.



Note

Any promoted Bundle that includes Universal Template changes cannot be restored. The Promotion History for the promotion will be flagged as not restorable. The Universal Template changes will be listed as Promotion History Items with blank New Version, Previous Version, and Source Version fields.

Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Promotion History Details that let you perform various actions.
Run Report	Generates a one page summary of the contents of the bundle.
Restore Unchanged	For records that already existed on the target server, you can restore them to their state prior to the promotion. The Restore Unchanged button restores only those records that have not been changed since the promotion updated the record. For records that were created on the target machine by the promotion, no changes will occur since no previous version exists. (See Can Restore.)
Restore All	For records that already existed on the target server, you can restore them to their state prior to the promotion. The Restore All button restores all records that were updated by the promotion, including records that were modified since the promotion. For records that were created on the target machine by the promotion, no changes will occur since no previous version exists. (See Can Restore.)
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 record.
Tabs	This section identifies the tabs across the top of the Promotion History Details that provide access to additional information about the promotion.

Promotion History Items

Lists all the records promoted as part of this Bundle. Each record in the list provides the name and type of the record, the latest version number on the target, the previous version number on the target, and the source version number.

Records Promoted When Follow References is Selected or Not Selected

Introduction

The following table identifies the Records that automatically will be included in the promotion payload (Bundle or single record) when Follow References is selected and when Follow References is not selected.

The table is in the following format:

Record Type	With Follow References	Without Follow References
	For the record type being promoted, the records that automatically will be included in the promotion payload when Follow References is selected for the promotion.	For the record type being promoted, the records that will automatically be included in the promotion payload when the Follow References is not selected for the promotion.



Note

A Reference refers to the reference (or use) of one record by another record; for example, an Email Task references (or uses) an Email Connection.

Record Type	With Follow References	Without Follow References
Agent Clusters	none	none
Applications	 Application Control Tasks (both system-generated and custom Application Control Tasks) Business Services Credentials 	 Application Control Tasks (system-generated Application Control Tasks)
Business Services	none	none
Calendars	Business Services Custom Days	Custom Days
Credentials	Business Services	none
Custom Days	none	none

Database Connections	Business ServicesCredentials	none
Email Connections	Business Services	none
Email Templates	Business ServicesEmail Connections	none
SAP Connections	Business Services	none
Scripts	Business Services	none
SNMP Managers	Business Services	none

Tasks	 Action: Email Notification - Email Templates Action: SMMP Managers Action: System Operation = Set Virtual Resource Limit - Virtual Resources Action: System Operation = Suspend/Resume Agent Cluster - Agent Clusters or Cluster Broadcast Action: System Operation = Suspend/Resume Agent Cluster Membership - Agent Clusters or Cluster Broadcast Action: System Operation = Set Agent Cluster Execution Limit - Agent Clusters or Cluster Broadcast Action: System Operation = Run Task Instance Command - Tasks Agent Clusters or Cluster Broadcast Applications (Application Control tasks only) Business Services Child Tasks (Workflow tasks only) Credentials (Note: Some task types can contain multiple Credentials.) Database Connections (SQL and Stored Procedure tasks only) Email Connections (Email tasks only) Email Connections (Email tasks only) Email Templates (Email tasks only) Mutually Exclusive Tasks (Direct) Run Criteria - System Calendar (Workflow tasks only, without a Default Calendar and with Run Criteria specifying a Custom Days Choice (Workflow tasks only, without a Default Calendar and with Run Criteria specifying a Custom Day Choice) SAP Connections (for SAP Tasks) Scripts Step Action: System Operation = Set Virtual Resource Limit - Virtual Resources (Workflow tasks only) Step Action: System Operation = Suspend/Resume Agent Cluster Membership - Agent Clusters or Cluster Broadcast (Workflow tasks only) Step Action: System Operation = Suspend/Resume Agent Cluster Membership - Agent Clusters or Cluster Broadcast (Workflow tasks only) Step Action: System Operation = Set Agent Cluster Execution Limit - Agent Clusters (Workflow tasks only) Step Action: System Operation = Task Instance Command - Tasks (Workflow tasks only) Virtual Resources 	Child Tasks (Workflow tasks only)
Triggers	Business ServicesCalendarsTasks	none
Universal Tasks	 Agent Clusters Credentials Any fields that match a Universal Template Credential Field Type (Same as all other task types.) 	none
Universal Templates	 Agent Clusters Credentials Credential Field Type (if a default value has been defined) 	none

Variables	Business Services	none
Virtual Resources	Business Services	none