



**stonebranch**

Universal Controller 7.2.x

General Information

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- 1. General Information ..... 3
  - 1.1 Universal Controller - Overview ..... 4
  - 1.2 Universal Controller - Directory Structure ..... 6
  - 1.3 Setting up Universal Controller ..... 7
  - 1.4 Licensing ..... 9
    - 1.4.1 Agent-Only Licensing ..... 23
  - 1.5 Logging In ..... 31
  - 1.6 User Interface ..... 47
    - 1.6.1 Services ..... 61
    - 1.6.2 Records ..... 70
    - 1.6.3 Record Lists ..... 112
    - 1.6.4 Action Menus ..... 131
    - 1.6.5 Action URLs ..... 172
    - 1.6.6 User Preferences ..... 176
    - 1.6.7 Wildcards and Regular Expressions ..... 188
    - 1.6.8 Access Keys ..... 191

# General Information



## Universal Controller

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[Overview](#)

[Directory Structure](#)

[Setting up Universal Controller](#)

[Licensing](#)

[Logging In](#)



## Help

---

[Troubleshooting](#)

[Tutorials for Universal Controller](#)



## User Interface

[Overview](#)

[Home Dashboard](#)

[Services](#)

[Records](#)

[Record Lists](#)

[Filters](#)

[Action Menus](#)

[Action URLs](#)

[User Preferences](#)

[Wildcards and Regular Expressions](#)

[Access Keys](#)



The information on these pages also is located in the [Universal Controller 7.2.x General Information.pdf](#) and the [Universal Controller 7.2.x Troubleshooting and Tutorials.pdf](#).

# Universal Controller - Overview

- [Introduction](#)
- [Application Container](#)
- [Database](#)
- [Universal Message Service \(OMS\)](#)
- [Command Line Interface \(CLI\)](#)

## Introduction

Universal Controller, a Java web application running in a Tomcat web container, is the enterprise job scheduler and workload automation broker solution of [Universal Automation Center](#). The Controller presents a user interface for creating, monitoring, and configuring Controller information; handles the scheduling logic; processes all messages to and from [Universal Agents](#); and synchronizes much of the [High Availability](#) operation of Universal Automation Center.

Each instance of a Controller in a Universal Automation Center environment is referred to as a [cluster node](#). A High Availability (redundant system) environment contains two or more cluster nodes.

## Application Container

The application container is third-party software that serves as a container for the Controller. Universal Controller uses [Apache Tomcat](#) as the application container.

## Database

The database management component supports SQL queries to a set of tables in the Controller database.

The following [databases](#) are supported:

- Oracle 12c (Release 2), 18c, 19c, and 21c
- MS SQL Server 2012, 2014, 2016, 2017, 2019
- MySQL 5.7.x, 8.0.x

## Universal Message Service (OMS)

[Universal Message Service \(OMS\)](#) is the network communications provider between the Controller and Agent(s).

Note



OMS replaces the Message Hub and Transporter components of pre-5.2.0 releases of the Universal Automation Center.

OMS is installed as a component of [Universal Agent](#) for Windows and UNIX.

## Command Line Interface (CLI)

The Universal Controller [Command Line Interface \(CLI\)](#) is implemented as a set of commands that perform specific actions in a Controller. The CLI commands can execute on any system that has TCP/IP connectivity to OMS. The results of the action are printed to the CLI commands standard output.

The CLI is installed as a component of [Universal Agent](#) for z/OS, Windows, and UNIX.

# Universal Controller - Directory Structure

## Directory Structure

Shown below is the directory structure of Universal Controller.

### UNIX

```
$CATALINA_HOME/  
$CATALINA_HOME/bin  
$CATALINA_HOME/conf  
$CATALINA_HOME/lib  
$CATALINA_HOME/logs  
$CATALINA_HOME/uc_backup/System_Backups  
$CATALINA_HOME/uc_backup/System_Backups/Activity  
$CATALINA_HOME/uc_backup/System_Backups/Audit  
$CATALINA_HOME/uc_backup/System_Backups/History  
$CATALINA_HOME/uc_export  
$CATALINA_HOME/uc_images  
$CATALINA_HOME/uc_logs  
$CATALINA_HOME/webapps  
$CATALINA_HOME/webapps/uc
```

### Windows

```
$CATALINA_HOME\  
$CATALINA_HOME\bin  
$CATALINA_HOME\conf  
$CATALINA_HOME\lib  
$CATALINA_HOME\logs  
$CATALINA_HOME\uc_backup\System_Backups  
$CATALINA_HOME\uc_backup\System_Backups\Activity  
$CATALINA_HOME\uc_backup\System_Backups\Audit  
$CATALINA_HOME\uc_backup\System_Backups\History  
$CATALINA_HOME\uc_export  
$CATALINA_HOME\uc_images  
$CATALINA_HOME\uc_logs  
$CATALINA_HOME\webapps  
$CATALINA_HOME\webapps\uc
```

# Setting up Universal Controller

The following table provides a guideline for setting up Universal Controller. It is a checklist of features and functions, including links to the detailed information and instructions on this website.

<b>Perform Pre-installation Procedure</b>	Perform the <a href="#">pre-installation procedure</a> that is required before installing the Controller.
<b>Download Universal Controller Distribution File</b>	<a href="#">Download</a> the appropriate Universal Controller distribution file from the Stonebranch <a href="#">Customer Portal</a> .
<b>Install Universal Controller</b>	Install the Controller package from the downloaded Controller distribution file. See <a href="#">Universal Controller Installation</a> for help in getting the Controller installed and verified.
<b>Configure Universal Controller</b>	After installation, check the <a href="#">Universal Controller properties</a> . If you will be running the Controller in a <a href="#">High Availability</a> environment, you must <a href="#">configure</a> the Controller for High Availability.
<b>Log in to Universal Controller</b>	Once the Controller is installed and configured, we recommend that you <a href="#">log in</a> and familiarize yourself with the basic features of the <a href="#">user interface</a> . All Controller functions are accessed from the <a href="#">Services</a> . Within the user interface, you will create all your <a href="#">records</a> (for example: users, tasks, and triggers) by entering information into record Details. (See <a href="#">Naming Tips</a> for information on organizing your records.) The records are then displayed in <a href="#">lists</a> of each type, which you can sort and filter and perform a wide variety of other functions.
<b>Configure Password Settings</b>	Before you create <a href="#">users</a> for Universal Controller, configure the settings for all user <a href="#">passwords</a> .
<b>Set up Security</b>	Use the Controller <a href="#">Security</a> feature to create <a href="#">users</a> and <a href="#">user groups</a> and assign them <a href="#">roles</a> and <a href="#">permissions</a> . You can also define <a href="#">credentials</a> that are used by the Controller to log in to remote machines. You can create <a href="#">Business Services</a> that represent your organization and assign Controller records to them, and assign permission only to users and/or user groups that belong to a specific Business Services. A complete <a href="#">audit history</a> of all Controller activity also is available for regulatory compliance.
<b>LDAP and SAML</b>	Specify <a href="#">LDAP Settings</a> , which allow you to enable the LDAP bridge for both UNIX and Windows operating systems, and <a href="#">Single Sign-On Settings</a> , which allow you to pre-authenticate users to a third-party identity provider.
<b>Define Resources</b>	Define the types of <a href="#">resources</a> that you will need in your operational database. If you have installed <a href="#">Universal Agent</a> on any machines, records for each of them are automatically created when they connect to the Controller. You also may need to define one or more resources, such as <a href="#">email</a> , <a href="#">data base</a> , <a href="#">PeopleSoft</a> , and <a href="#">SAP</a> connections, as well as <a href="#">SNMP Managers</a> . You also can create status-based notifications for <a href="#">Agent</a> , <a href="#">Cluster Node</a> , and <a href="#">OM S Server</a> resources. You can set up a throttling scheme for your machines using <a href="#">Virtual Resources</a> and create <a href="#">scripts</a> that you can execute on remote machines.
<b>Create Tasks and Workflows</b>	Once you have your resources in place, you can begin <a href="#">creating tasks</a> . Supported task types are <a href="#">Workflows</a> , <a href="#">Linux/Unix</a> , <a href="#">Windows</a> , <a href="#">z/OS</a> , <a href="#">Universal Command</a> , <a href="#">SAP</a> , <a href="#">PeopleSoft</a> , <a href="#">File Transfer</a> , <a href="#">Manual</a> , <a href="#">Timer</a> , <a href="#">SQL</a> , <a href="#">Stored Procedure</a> , <a href="#">Email</a> , <a href="#">Web Service</a> , <a href="#">Recurring</a> , <a href="#">Task Monitor</a> , <a href="#">Agent File Monitor</a> , <a href="#">Remote File Monitor</a> , <a href="#">FTP File Monitor</a> , <a href="#">System Monitor</a> , <a href="#">Variable Monitor</a> , <a href="#">Email Monitor</a> , <a href="#">Application Control</a> , and <a href="#">Universal</a> .
<b>Create Universal Templates and Universal Tasks</b>	In order to design your own <a href="#">Integrations</a> , you first must create the <a href="#">Universal Templates</a> on which the Universal Tasks are based.
<b>Create Task Triggers</b>	To run your tasks outside of workflows, you can create <a href="#">task triggers</a> , which define events, conditions, or dates/times that the tasks will run. Trigger types include <a href="#">Cron</a> , <a href="#">Time</a> , <a href="#">Temporary</a> , <a href="#">Manual</a> , <a href="#">File Monitor</a> , <a href="#">Task Monitor</a> , <a href="#">Variable Monitor</a> , <a href="#">Email Monitor</a> , <a href="#">Application Monitor</a> , and <a href="#">Composite</a> . You may also need to set up one or more customized <a href="#">calendars</a> that reflect your fiscal year and holiday schedules, and <a href="#">custom days</a> for those calendars.
<b>Manually Run and Control Tasks</b>	You also may need to manually run and control tasks, either from the <a href="#">user interface</a> , the <a href="#">command line</a> , or the <a href="#">API</a> .
<b>Create and Run Reports</b>	The <a href="#">Report Details</a> feature lets you create reports from a variety of Universal Controller database tables. You can use a report to create a <a href="#">Widget</a> .
<b>Monitor Operations</b>	You will monitor your automated operations from the <a href="#">Activity Monitor</a> , which you can customize using <a href="#">Filters</a> .

<p><b>Dashboards</b></p>	<p>The <a href="#">Home Dashboard</a>, a system-defined <a href="#">Dashboard</a> that displays when you log in to the Controller, provides details about the Controller system and status information on <a href="#">active task instances</a>, <a href="#">Agents Overview</a>, <a href="#">Cluster Nodes</a>, and OMS Servers]. You also can create your own <a href="#">Dashboard Details</a> that display information about the Controller, its environment, and the jobs it is running as defined in system-provided and user-defined <a href="#">Widgets</a>.</p>
<p><b>Monitor and Control Applications</b></p>	<p>The Controller lets you to <a href="#">monitor and control</a> all of the <a href="#">applications</a> that you may have running in your entire network.</p>
<p><b>Command Line Interface (CLI) and API</b></p>	<p>In addition allowing you to manually run and control tasks, you also can monitor and control your operations and perform basic administrative functions from the <a href="#">command line</a> or the <a href="#">API</a>.</p>
<p><b>Manage Data and Audit Records</b></p>	<p>Comprehensive utilities are provided that allow you to manage your Controller records. You can view, restore, and purge old <a href="#">versions</a> of Controller records, <a href="#">bundle and promote records</a> from one Controller server to another, and <a href="#">export and import records</a> when performing a Controller upgrade. You also can configure the automatic <a href="#">backup and purge</a> of Controller data.</p>
<p><b>Help and Support</b></p>	<p>This documentation website provides information to help you install, configure, and use the Controller; see <a href="#">Documentation Help</a> for information on documentation layout and usage. Step-by-step <a href="#">tutorials</a> are available for many of the features and functions described here. <a href="#">Troubleshooting</a> provides a description of error messages that you could encounter, as well as potential problems and solutions. <a href="#">Technical Support</a> for critical and non-critical problems is always available.</p>

# Licensing

- [System Details Widget](#)
  - [System Details Widget Categories](#)
  - [Flagged Categories](#)
- [Expiry Date](#)
- [Distributed Agents and z/OS Agents](#)
- [Tasks](#)
- [Number of Monthly Executions](#)
- [High Availability Licensed Cluster Nodes](#)
  - [Number of Nodes within the Licensed Amount \(No Violation\)](#)
  - [Number of Nodes exceeds or will exceed the Licensed Amount \(Violation\)](#)
  - [Unlicensed Node Processing](#)
  - [Unlicensed Node UI](#)
- [Universal Connector for PeopleSoft](#)
  - [PeopleSoft Connections](#)
  - [PeopleSoft Task Instances](#)
- [Universal Connector for SAP](#)
  - [SAP Connections](#)
  - [SAP Task Instances](#)
- [Reports](#)

## System Details Widget

The System Details widget displays Universal Controller system information in the following categories:

- [Cluster Node](#)
- [Release](#)
- [Memory](#)
- [License](#)
- [Database](#)

The License category has been enhanced to display:

- [Universal Agent-defined limits for the number of:](#)
  - [Universal Connector for PeopleSoft \(UPPS\) connections.](#)
  - [Universal Connector for SAP \(USAP\) connections.](#)
- [Universal Agent for SOA protocols](#) that are licensed for use.

### Note



For details on all Universal Agent license information, see [Universal Agent Licensing](#).

**System Details**

▲ **Cluster Node { Active }**

Node Id	qa-cntlr-mysql.stone.branch:8080-qa_cntlr_mysql
Node Mode	Active
Node Uptime	3 Days 21 Hours 28 Minutes 44 Seconds
Node Time	2020-10-09 11:02:58 -0400 (America/New_York)

▲ **Release { 6.9.0.0 build.151 }**

Release	6.9.0.0
Build	build.151
Build Date	10-05-2020_1155

▲ **Memory { 120.15 MB (11.80%) / 1018.00 MB }**

Memory Maximum	1018.00 MB
Memory Used	120.15 MB (11.80%)
Memory Free	897.85 MB (88.20%)

▲ **License { Pre 6.8 License Migrated. }**

Expiry Date	2020-11-18 [Days: 45]
Cluster Nodes	Unlimited
Distributed Agents	3/3
z/OS Agents	2/2
Tasks	Unlimited
Monthly Executions	Unlimited
UPPS	true
USAP	true
Exclude Source Recurring	false
UPPS Connections	Unlimited
USAP Connections	Unlimited

JMS	false
IBM WebSphere MQ	false
SOAP	false
XD SOAP	false
HTTP	false
Customer	Pre 6.8 License Migrated.
<b>Database { MySQL }</b>	
Database Type	MySQL
Database Name	qa_cntlr_mysql
Database URL	jdbc:mysql://qa-db7.stone.branch/
Database Connections	Server (0/6) Client (0/1) Reserved (0/2)

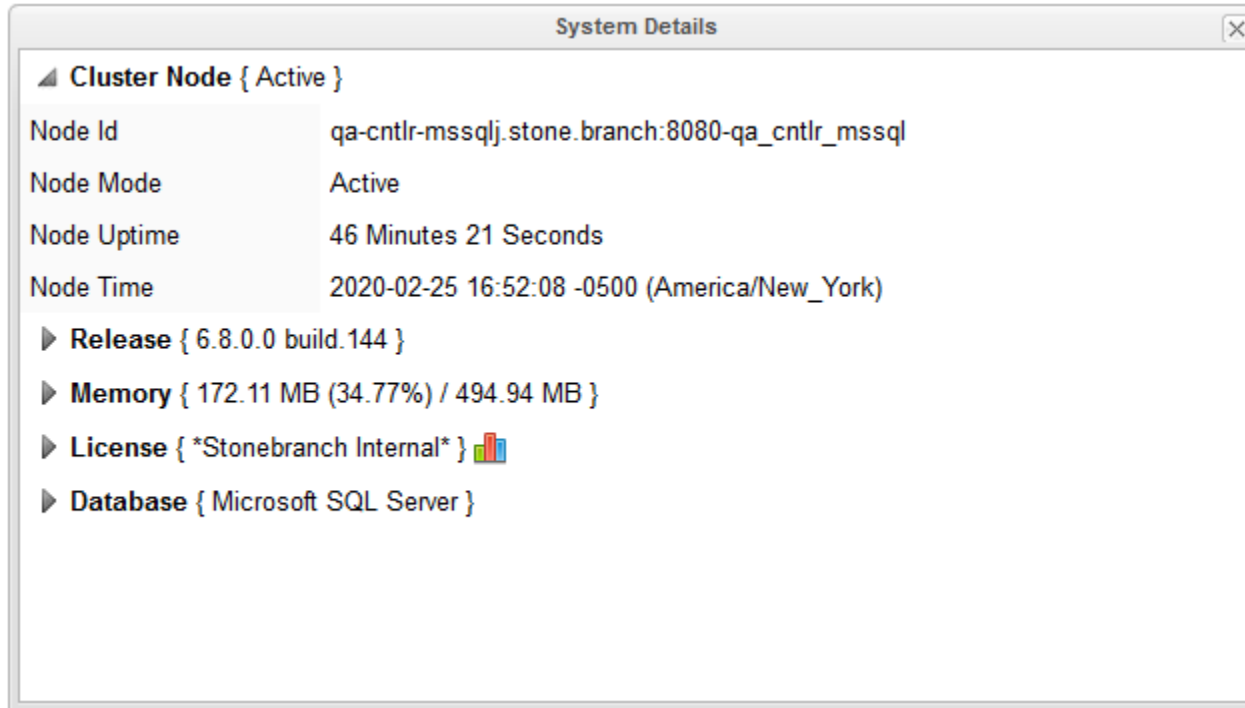
## System Details Widget Categories

This new design has the following categories, along with their respective attributes, defined within the widget.

- **Cluster Node** { *Node Mode* }
  - Node Id
  - Node Mode
  - Node Uptime
  - Node Time
- **Release** { *ReleaseBuild* }
  - Release
  - Build
  - Build Date
- **Memory** { *Memory Used / Memory Maximum* }
  - Memory Maximum
  - Memory Used
  - Memory Free
- **License** { *Customer* }
  - Expiry Date
  - Cluster Nodes
  - Distributed Agents
  - z/OS Agents
  - Tasks
  - Monthly Executions
  - UPPS
  - USAP
  - Exclude Source Recurring
  - UPPS Connections
  - USAP Connections
  - JMS
  - IBM WebSphere MQ

- SOAP
- XD SOAP
- HTTP
- Customer
- **Database** { Database Type }
  - Database Type
  - Database Name
  - Database URL
  - Database Connections

By default, all categories will be collapsed with the exception of the **Cluster Node** category.



While the dashboard remains open, any change to the expanded categories will be preserved between widget/dashboard refreshes.

To change the category expansion default, see the [System Details Expanded Categories](#) Universal Controller system property.

Note

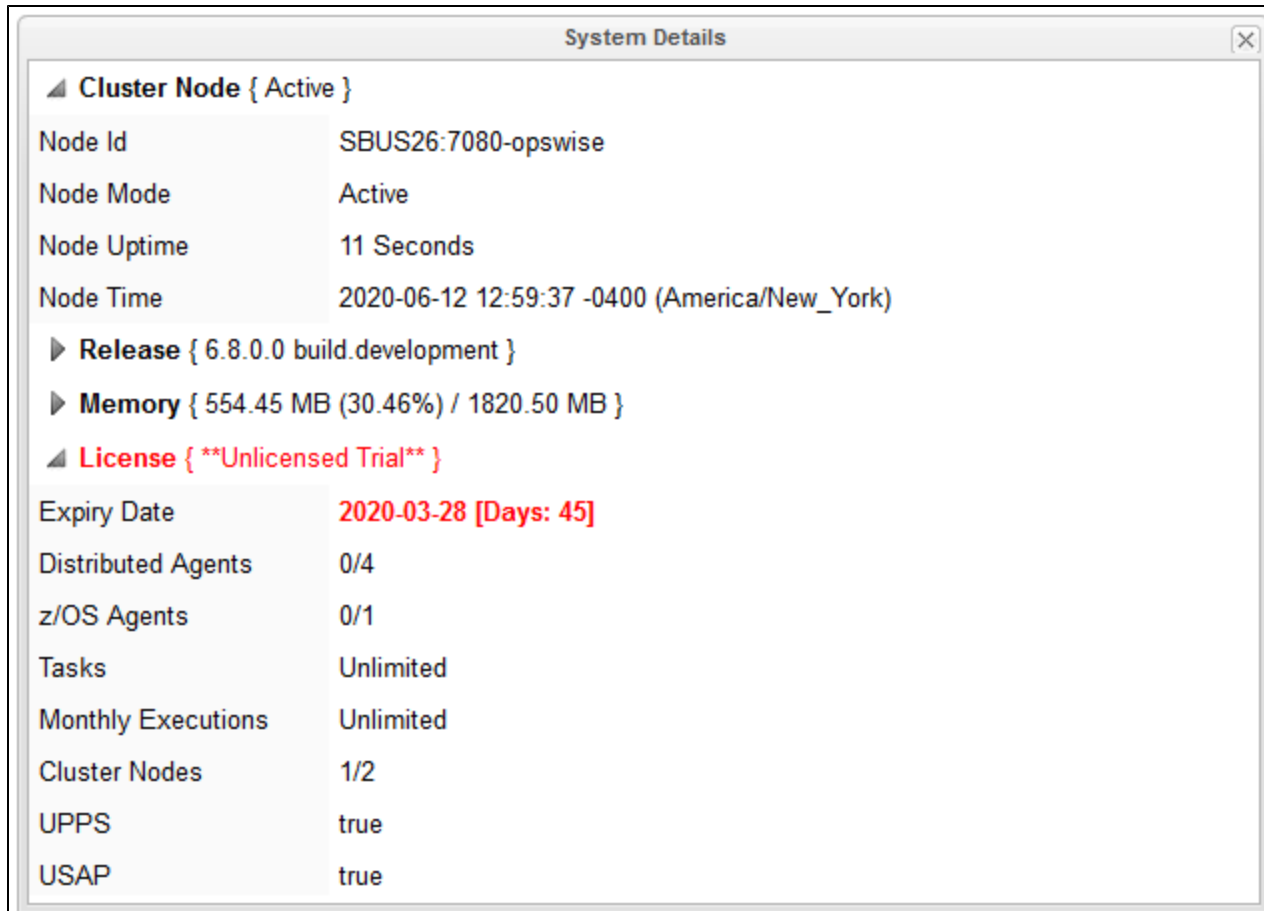


Clicking the License category bar chart icon runs the [UAC - Licensed Monthly Task Instance Executions](#) built-in system report.

## Flagged Categories

If an attribute under a category is flagged, the category will be expanded automatically and appear in **red**. Likewise, the flagged attribute will also appear in **red**.

For example:



The following attributes can be flagged.

Cluster Node	Node Mode	Flagged when this cluster node is Unlicensed.
Memory	Memory Used	Flagged when percentage of memory used is greater than or equal to 90%.
License	<a href="#">Expiry Date</a>	Flagged when current date is past the expiry date.
License	<a href="#">Distributed Agents</a>	Flagged when number of registered distributed agents (Windows/Linux) exceeds licensed distributed agents.
License	<a href="#">z/OS Agents</a>	Flagged when number of registered z/OS agents exceeds licensed z/OS distributed agents.
License	<a href="#">Tasks</a>	Flagged when number of task definitions exceeds licensed number of tasks.

License	<a href="#">Monthly Executions</a>	Flagged when number of monthly task instance executions exceeds licensed number of monthly executions.
License	<a href="#">Cluster Nodes</a>	Flagged when number of registered cluster nodes exceeds licensed number of cluster nodes.

## Expiry Date

The license has an explicit expiry date, regardless of when the license is applied.

In prior releases, the expiry date was always based on the number of days relative from the date the license was applied.

## Distributed Agents and z/OS Agents

Distributed Agents (Windows, Linux/Unix) and z/OS Agents are licensed separately.

A z/OS agent with [secondary Agents](#) requires a license for the primary Agent and one license for each secondary Agent.

In prior releases, agents were licensed under a single Agents component.

For information on how licenses are migrated from a prior release, see [Product Licensing](#) in the Universal Controller 6.8.0.0 Release Notes.

## Tasks

The Controller license can enforce a fixed number of Task definitions or allow an Unlimited number of Task definitions.

## Number of Monthly Executions

The Controller is licensed by the number of monthly executions; specifically, the number of task instances that run to Success or Finished over a period of one month.

The following task types are excluded from the monthly execution count.

- Workflow
- Timer
- Agent File Monitor
- Manual
- Remote File Monitor
- Task Monitor
- System Monitor
- Application Control
- Variable Monitor
- Email Monitor

#### Note



Universal Monitors also are excluded from Monthly Executions.

The Type filter for the following built-in reports were updated.

- UAC - Licensed Monthly Task Instance Executions
- UAC - Completed Task Counts : Grouped by Month
- UAC - Completed Task Counts : Grouped by Month / Stacked by Type

Extension-based Universal Tasks that are Launched by a Universal Monitor as a configured Universal Task Publisher will be excluded from license instance history collection using the Launch Source. These instances will have a Launch Source of Universal Monitor or Universal Monitor Trigger.

Additionally, task instances with Launch Source = Recurring are excluded from monthly execution count if their Exclude Source Recurring licensing attribute is enabled.

The Controller will capture execution statistics on a daily basis, commencing immediately after midnight in the server timezone, and store those statistics in the **License Instance History (ops\_license\_exec\_history)** table.

If you are licensed for an **Unlimited** number of monthly executions, then there is no limit on the number of task instances you can run.

## High Availability Licensed Cluster Nodes

When a Universal Controller has restrictions on the Cluster Nodes within its License, the following behavior may be experienced when a new or existing Cluster Node is started up:

### Number of Nodes within the Licensed Amount (No Violation)

If a new Cluster Node starts up and adding this new Cluster Node will not violate the License:

- The usual process occurs where the Cluster Node is created and starts up as Passive.

If an existing Cluster Node starts up and the License is not in violation with respect to Cluster Nodes:

- The usual process takes place with the Cluster Node starting up as Passive.

### Number of Nodes exceeds or will exceed the Licensed Amount (Violation)

If a new Cluster Node starts up and adding this new Cluster Node will violate the License, or the License is already in violation for Cluster Nodes:

- The new Cluster Node will be added but it will run as a new status of "Unlicensed".

If an existing Cluster Node starts up and there are more Cluster Nodes than the License allows; that is, the License already is in violation for Cluster Nodes:

- A count of running Cluster Nodes is taken:
  - If the number of running Cluster Nodes is less than the licensed amount, the Cluster Node starts up normally as Passive.
  - If the number of running Cluster Nodes exceeds the licensed amount, the Cluster Node starts up as Unlicensed.

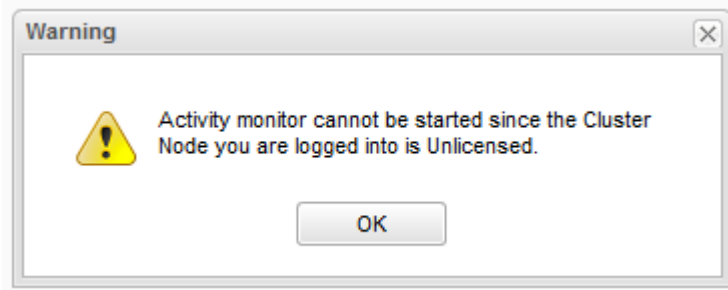
## Unlicensed Node Processing

When a Cluster Node starts up as Unlicensed, it can only transition out of this mode for the following conditions:

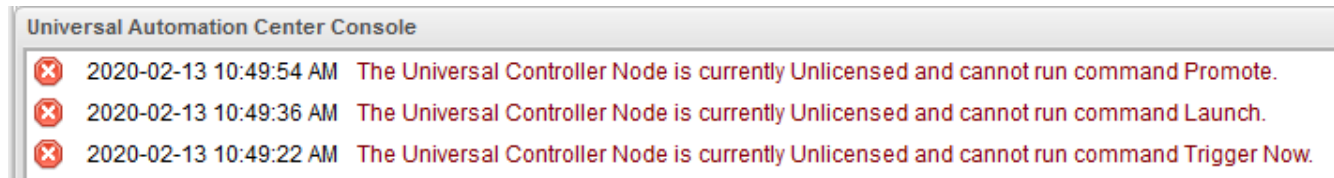
- A new License is applied to the system that no longer makes the amount of Cluster Nodes in violation of the License.
- Deletion of Cluster Node(s) occurs, thereby removing the Cluster Node violation of the License.

A user can connect to an Unlicensed Cluster Node from the User Interface; however, limited interaction is allowed:

- Activity Monitoring is not allowed.



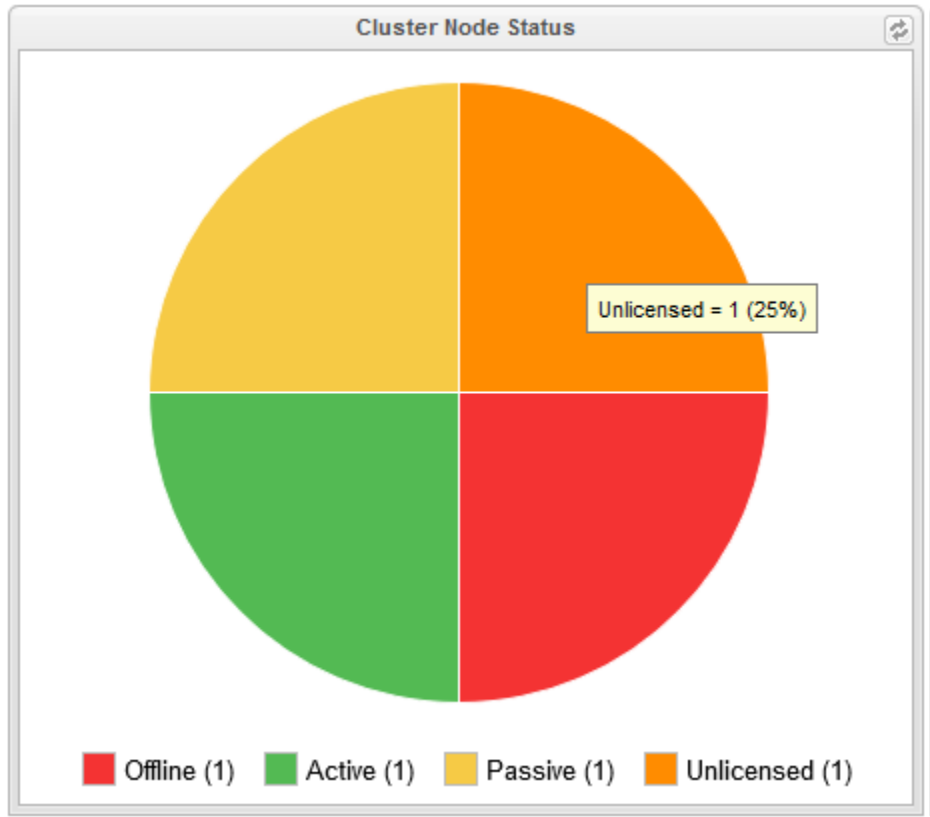
- Commands are not allowed to be executed.



- Create/Update/Delete are NOT allowed of Tasks/Triggers/Calendars/Custom Days/.....
- Cluster Nodes can be deleted (as long as they are marked offline, as usual).
- Properties can be updated, in order to allow a new license to be applied.

## Unlicensed Node UI

The Cluster Node Status widget will show Unlicensed Cluster Nodes as seen below:



Cluster Node List:

4 Cluster Nodes	
Node Id	Mode
WorkLaptop:7080-opswise	Unlicensed
XXX:1-opswise	Passive
YYY:2-opswise	Offline
ZZZ:3-opswise	Active

When connected to an Unlicensed Cluster Node, The License under the System Details will recognize it as:

System Details

▲ **Cluster Node { Unlicensed }**

Node Id	WorkLaptop:7080-opswise
Node Mode	<b>Unlicensed</b>
Node Uptime	1 Hour 14 Minutes 0 Seconds
Node Time	2020-02-13 11:59:27 -0500 (America/New_York)

▶ **Release { 6.8.0.0 build.development }**

▶ **Memory { 204.89 MB (5.63%) / 3641.00 MB }**

## Universal Connector for PeopleSoft

The License will have a new boolean (True/False) attribute for Universal Connector for PeopleSoft (UPPS) to control whether or not UPPS is allowed.

The following will be prohibited if not licensed for UPPS:

1. Creating PeopleSoft Connections.
2. Executing PeopleSoft Task Instances.

### PeopleSoft Connections

Creating a new PeopleSoft Connection will only be allowed if licensed for UPPS.

The following error message will be logged if not licensed for UPPS.

```
PeopleSoft Connection cannot be created because of License restriction.
```

If system notifications are enabled, a license notification email also will be sent with the following message in the email body.

```
Universal Controller node 'localhost:8080-uc'is not licensed forUPPS.
User 'ops.admin'was prohibited from creating PeopleSoft Connection 'PPSC1'.
Please contact Stonebranch customer support.
...
```

#### Note



- PeopleSoft Connections will not be hidden in the UI if not licensed for UPPS.
- Creating PeopleSoft Connections will not be prohibited by Promotion, List Import, or Bulk Import.

## PeopleSoft Task Instances

Creating new PeopleSoft Tasks will not be prohibited if not licensed for UPPS. Likewise, launching a PeopleSoft Task will not be prohibited; however, PeopleSoft Task Instances will transition to a *Start Failure* **Status** with the following **Status Description**:

```
Execution prohibited due to License restriction.
```

If system notifications are enabled, a license notification email also will be sent with the following message in the email body.

```
Universal Controller node 'localhost:8888-uc' is not licensed for UPPS.  
  
Execution of PeopleSoft task instance 'PPST1' was prohibited.  
  
Please contact Stonebranch customer support.  
...
```

### Note



PeopleSoft Tasks/Task Instances will not be hidden in the UI if not licensed for UPPS.

## Universal Connector for SAP

The License will have a new boolean (True/False) attribute for Universal Connector for SAP (USAP) to control whether or not USAP is allowed.

The following will be prohibited if not licensed for USAP:

1. Creating SAP Connections.
2. Executing SAP Task Instances.

## SAP Connections

Creating a new SAP Connection will only be allowed if licensed for USAP.

The following error message will be logged if not licensed for USAP.

```
SAP Connection cannot be created because of License restriction.
```

If system notifications are enabled, a license notification email also will be sent with the following message in the email body.

```
Universal Controller node 'localhost:8080-uc' is not licensed for USAP.  
  
User 'ops.admin' was prohibited from creating SAP Connection 'SAPC1'.  
  
Please contact Stonebranch customer support.  
...
```

### Note



- SAP Connections will not be hidden in the UI if not licensed for USAP.
- Creating SAP Connections will not be prohibited by Promotion, List Import, or Bulk Import.

## SAP Task Instances

Creating new SAP Tasks will not be prohibited if not licensed for USAP. Likewise, launching an SAP Task will not be prohibited; however, SAP Task Instances will transition to a *Start Failure* **Status** with the following **Status Description**:

```
Execution prohibited due to License restriction.
```

If system notifications are enabled, a license notification email also will be sent with the following message in the email body.

```
Universal Controller node 'localhost:8080-uc' is not licensed for USAP.  
  
Execution of SAP task instance 'SAPT1' was prohibited.  
  
Please contact Stonebranch customer support.  
...
```

### Note



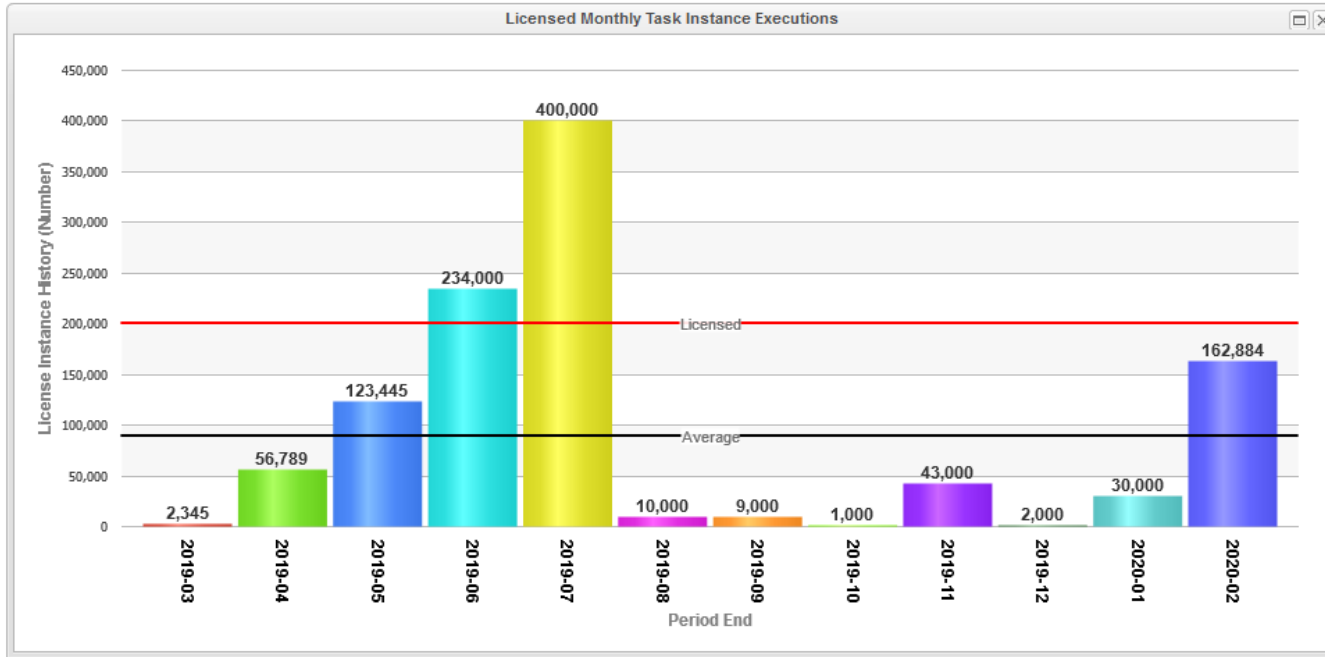
SAP Tasks/Task Instances will not be hidden in the UI if not licensed for USAP.

## Reports

A new [built-in report](#), **UAC - Licensed Monthly Task Instance Executions**, visually display the number of monthly executions.

The report is driven by data in the **License Instance History (ops\_license\_exec\_history)** table, which also is available as a **Table** for selection for custom-built reports.

The report shows the average number of monthly executions, and the licensed number of monthly executions if not **Unlimited**, as shown in the following example.



Furthermore, when viewing the report definition, the **Show Threshold**, **Threshold Color**, **Threshold Value**, and **Threshold Label** will be dynamically populated with values in-line with the applied license.

**Chart Options**

Chart Size : <input type="text" value="Large"/>	Bar Thickness : <input type="text" value="150"/>
Group By : <input type="text" value="Period End"/>	Group Threshold : <input type="text" value="Unlimited"/>
Stack By : <input type="text"/>	Group Order : <input type="text" value="Label"/>
Sum Field : <input type="text" value="Number"/>	Group Date/Time Format : <input type="text" value="yyyy-mm"/>
Show Average : <input checked="" type="checkbox"/>	Average Color : <input type="text" value="#000000"/>
Show Threshold : <input checked="" type="checkbox"/>	Threshold Color : <input type="text" value="#FF0000"/>
Threshold Value : <input type="text" value="500"/>	Threshold Label : <input type="text" value="Licensed"/>



# Agent-Only Licensing

- [Overview](#)
- [User Interface](#)
  - [Automation Center Navigation](#)
  - [Bundles and Promotion](#)
  - [Reporting Navigation](#)
  - [Agents and Connections Navigation](#)
  - [Administration Navigation](#)
- [System Details Widget](#)

## Overview

With the introduction of the Universal Agent 6.9.0.0, Universal Controller became the central location for the management of all licensing.

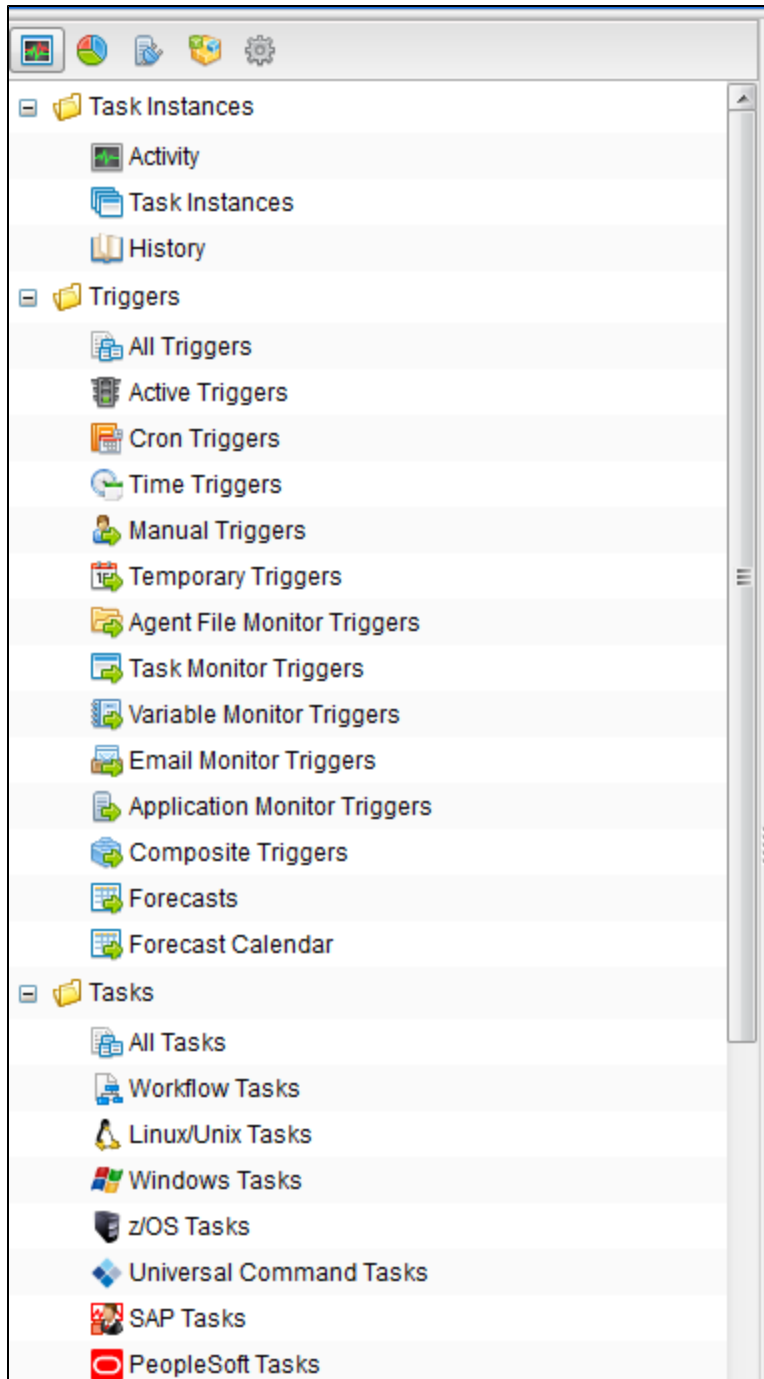
If you do not use Universal Controller as your enterprise job scheduler and workload automation broker solution, the Controller has an [Agent-only license mode](#) that allows you to manage licensing for Universal Agent 7.2.x deployments.

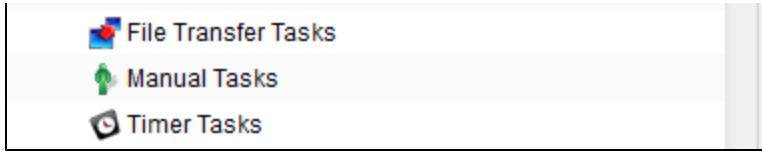
## User Interface

If an Agent-only license is applied to the Controller, logging into the Controller user interface presents restricted navigation.

## Automation Center Navigation

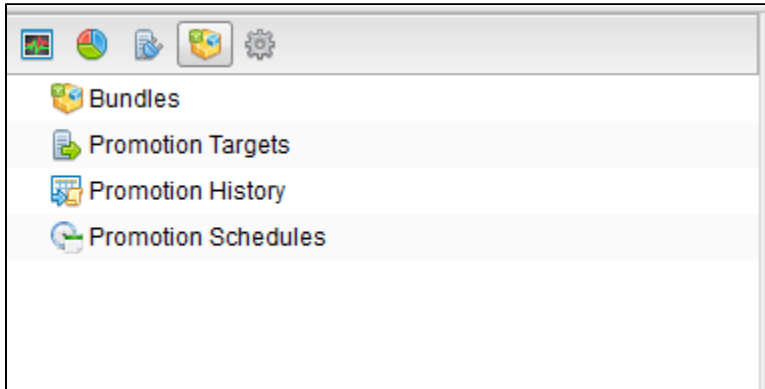
The [Automation Center navigation pane](#), as shown here, which normally is the default navigation pane in the Controller [user interface](#), is not relevant in the context of an Agent-only license, and is hidden from view; the Automation Center icon is not available for selection.





## Bundles and Promotion

The [Bundles & Promotion navigation pane](#), as shown here, is not relevant in the context of an Agent-only license and is hidden from view; the Bundles & Promotion icon is not available for selection.

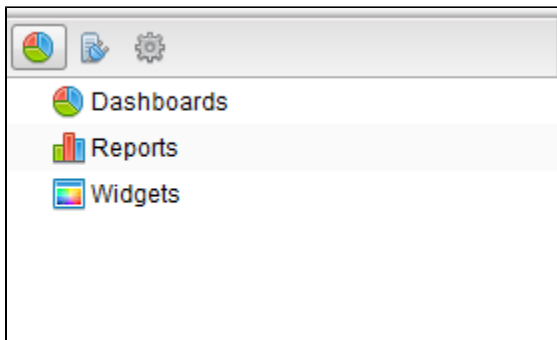


## Reporting Navigation

Under the [Reporting navigation pane](#), the following menu options are available:

- Dashboards
- Reports
- Widgets

The Colors menu option is hidden.



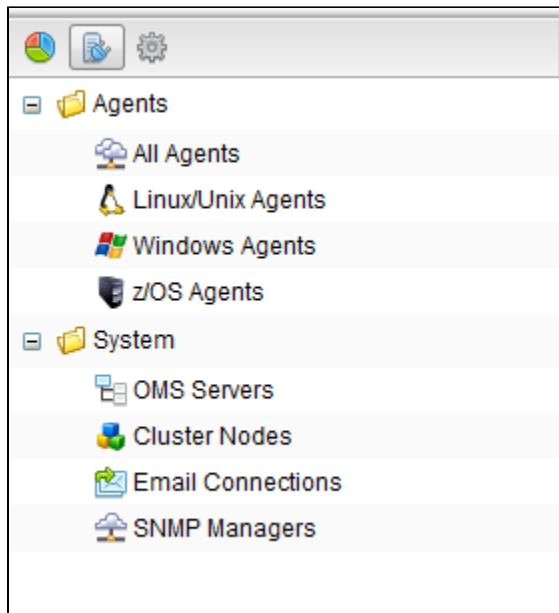
## Restrictions

Reports	<p>You can create reports only on Report tables that are permitted in Agent-Only licensing mode:</p> <ul style="list-style-type: none"> <li>• Agents</li> <li>• Cluster Nodes</li> <li>• Connections             <ul style="list-style-type: none"> <li>• Email Connections</li> <li>• OMS Servers</li> <li>• SNMP Managers</li> </ul> </li> <li>• Security</li> <li>• Widgets</li> </ul>
Widgets	<p>You cannot create Activity Widgets in Agent-Only licensing mode.</p> <p>You cannot create Report Widgets for Reports that are not permitted in Agent-Only licensing mode.</p> <p>Note </p> <p>You can create Report Widgets for all <a href="#">Built-In Reports</a> in Agent-Only licensing mode.</p>

## Agents and Connections Navigation

Under the [Agents & Connections navigation pane](#), the following menu options are available:

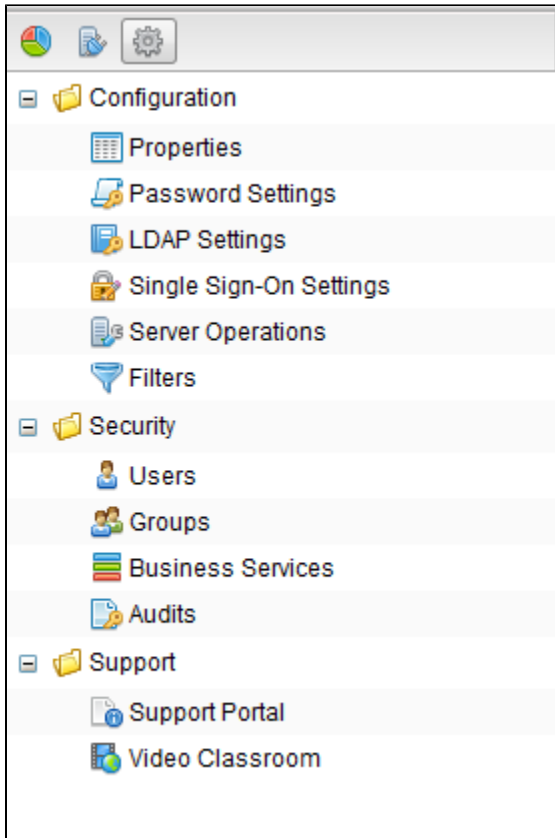
- Agents
  - Linux/Unix Agents
  - Windows Agents
  - z/OS Agents
- System
  - OMS Servers
  - Cluster Nodes
  - Email Connections
  - SMNP Managers




## Administration Navigation

Under the [Administration navigation pane](#), the following menu options are available:

- Configuration
  - Properties
  - Password Settings
  - LDAP Settings
  - Single Sign-On Settings
  - Server Operations
  - Filters
- Security
  - Users
  - Groups
  - Business Services
  - Audits
- Support
  - Support Portal
  - Video Classroom



Note



 In the Agent-only license mode, the Administration navigation pane is the default navigation pane.

## System Details Widget

If the License is for a normal Universal Controller system (that is, not Agent-Only), no changes to the License Information are displayed; no mention of Agent-Only will be presented if the -AGENTONLY attribute is set to False.

▲ License { Junit } 	
Expiry Date	2029-10-13
Distributed Agents	5/5
z/OS Agents	0/1
Cluster Nodes	2/3
Tasks	166/500
Monthly Executions	0/5000
UPPS	true
USAP	true
UPPS Connections	3
USAP Connections	0
JMS	true
IBM WebSphere MQ	true
SOAP	true
XD SOAP	true
HTTP	true
Customer	Junit
Environment	Test

If the License is for Agent Only set-up, the icon to display Licensed Monthly Task Instance Executions will not be displayed, nor will any information about Tasks or Monthly Executions.

 License { Mark } 	
Expiry Date	2021-10-13
Distributed Agents	5/5
z/OS Agents	0/1
Cluster Nodes	2/3
Agent Only	true
UPPS Connections	2
USAP Connections	0
JMS	true
IBM WebSphere MQ	true
SOAP	true
XD SOAP	true
HTTP	true
Customer	Mark
Environment	Test

# Logging In

- [Login Methods](#)
- [Standard Login](#)
  - [Changing Your Password](#)
  - [Password Expiration](#)
- [Single Sign-On Login](#)
- [User Lockout](#)
- [User Restriction](#)
- [License Expiration](#)
- [Login Disclaimer](#)
- [Login Notification](#)
- [Logging Out](#)
  - [Exiting without Logging Out](#)
  - [SAML Single Logout](#)
- [Log File and Audits](#)
  - [Log File Messages](#)
  - [Audit Messages](#)
- [User Sessions](#)
  - [Send an Email to Logged In Users](#)
  - [Expire User Sessions](#)

## Login Methods

Universal Controller provides a [Login Method](#) option at the user account level that allows you to select the following login methods:

- [Standard](#)
- [Single Sign-On](#)
- Both Standard and Single Sign-On

The default login method for a user depends on the user account type.

Account Type	Login Method
Local User Account	<p>Local user accounts, by default, are designated with the <a href="#">Standard</a> login method.</p> <p>Any user account created prior to Universal Controller 6.4.6.0 is, by default, designated with the Standard login method; for example, after an upgrade, or after importing users from an earlier release.</p> <p>Any attempt by a user to use the Standard login for an account that is not designated to use Standard login method will receive the following error:</p> <div data-bbox="474 1256 1959 1370" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <pre>Username and/or password invalid.</pre> </div>
LDAP-Provisioned User Account	<p>Any user provisioned through LDAP synchronization will be designated, by default, with the login method(s) configured in the <a href="#">LDAP Settings</a>.</p> <p>The designation of the login method only applies at user creation time.</p>

Single Sign-On-Provisioned User Account

Any user provisioned through SAML Single Sign-On will be designated, by default, with the [Single Sign-On](#) login method only. The designation of the login method only applies at user creation time.



Note

The local administrator account, ops.admin, is configured to allow only the Standard login method. Modification of the ops.admin account Login Method is not permitted.

For additional details on login method enforcement, see [Single Sign-On Troubleshooting](#).

## Standard Login

The **Universal Automation Center Login** page displays automatically when you bring up the Universal Controller system and browse to its URL.

The Standard login URL is:

`http(s)://<server:port>/uc/login.jsp` (or simply, `http(s)://<server:port>/uc/`).

All Local account and AD/LDAP-authenticated accounts authenticate through this standard login URL.

stonebranch

Username:

Password:


Login

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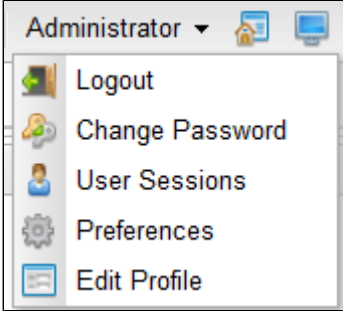
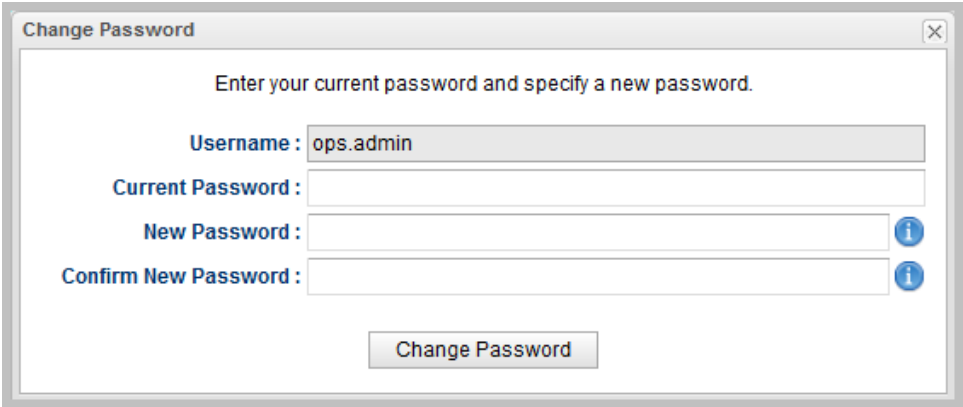
<b>User Name</b>	The default login User name is <b>ops.admin</b> .
<b>Password</b>	For your initial login to the Controller, no password is required; the Controller prompts you to create a password.

## Changing Your Password

Note

 Changing your password is not applicable to users that log in using LDAP authentication.

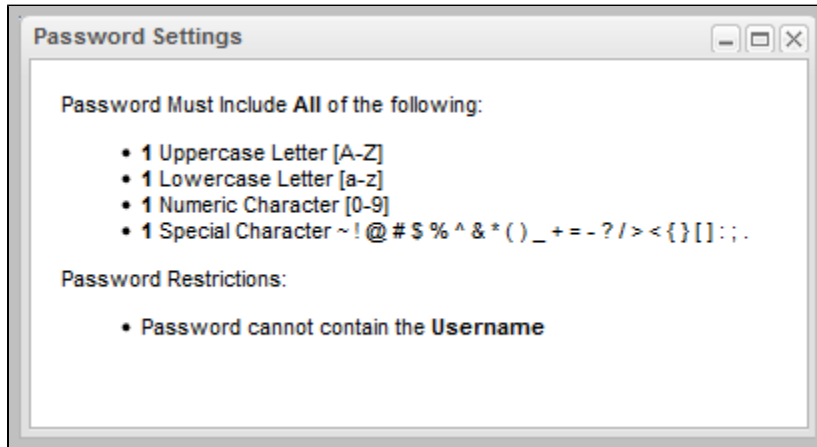
To change your password at any time after you have logged in:

<p><b>Step 1</b></p>	<p>On the <b>User task bar</b>, click the <b>User Actions</b> drop-down list arrow to display a menu of user actions.</p> 
<p><b>Step 2</b></p>	<p>Click <b>Change Password</b>. The <b>Change Password</b> dialog pops up.</p> 
<p><b>Step 3</b></p>	<p>Enter your <b>Current Password</b> and a <b>New Password</b>, and reenter your new password in <b>Confirm New Password</b>.</p>
<p><b>Step 4</b></p>	<p>Click the <b>Change Password</b> button.</p>

Note

If any [Password Settings](#) have been defined for user passwords, the hint for the New Password and Confirm New Password fields, as well as the information icon pop-up for either field, will display those settings.

For example:



## Password Expiration

Note

Password expiration is not applicable to users that log in using LDAP authentication.

If the [Password Expiration Enabled](#) field in [Password Settings](#) has been enabled, and you reach the maximum number of days that a user password can remain unchanged, as specified by the [Password Expiration in Days](#) field in [Password Settings](#), the following dialog displays when you enter your password on the [Standard Login](#) page:

Username:           jdoe


Current Password:   

New Password:       

Confirm New Password:

**The system administrator requires you to change your password. Your password has expired.**

Note

 Below the **Change Password** button, the Change Password dialog will displays any characteristics and restrictions defined in [Password Settings](#).

For example:

**Password Settings** - □ ×

**Password Must Include All of the following:**

- 1 Uppercase Letter [A-Z]
- 1 Lowercase Letter [a-z]
- 1 Numeric Character [0-9]
- 1 Special Character ~ ! @ # \$ % ^ & \* ( ) \_ + = - ? / > < { } [ ] ; : .

**Password Restrictions:**

- Password cannot contain the **Username**

You must enter a new password, one that is different than your currently expired password. (To maintain a high level of security, you should never use a password that you have used before.)

1. In **Current Password**, enter your password that has just expired.
2. In **New Password** and **Confirm New Password**, enter a new, previously unused password.
3. Click **Change Password**.

If you try to enter your currently expired password as your new password, the following error message displays on the Password Expired dialog:

```
Your new password cannot be the same as your current password.
```

## Single Sign-On Login

For information on Single Sign-On Login method and the Single Sign-On Login URL, see [Single Sign-On Login](#) on the [Single Sign-On Settings](#) page.

## User Lockout

If the [Lock Account After Maximum Login Attempts](#) field in [Password Settings](#) has been enabled, and you reach the maximum number of successive login attempts that is allowed, as specified by the [Maximum Failed Login Attempts](#) field in [Password Settings](#), your user account in Universal Controller will be locked.

(Whenever [Lock Account After Maximum Login Attempts](#) is reset from enabled to disabled, the current number of login attempts for all users is reset to 0.)

If you attempt to log in to a locked account, the following message displays:

```
User account <Username> is locked. Please check with your administrator."
```

To unlock a locked account, your Controller system administrator must uncheck the **Locked out** field on the [User Details](#) for that user account.

## User Restriction

You can be restricted from logging in to the Universal Controller user interface either of two ways:

1. The system level default for web browser access, specified by the [System Default Web Browser Access](#) Universal Controller system property, has been set to **No**, and the **Web Browser access** field in the [User Details](#) for your user account is set to **-- System Default --**.
2. The **Web Browser access** field is set to **No**, which overrides the **System Default Web Browser Access** value (**Yes** or **No**).

If either restriction is in place, the following error message will display when you enter your user name at the **User name** prompt:

```
User <Username> not permitted to login through the web browser. Please check with your administrator.
```

To remove the restriction, the system administrator must either:

- Set the System Default Web Browser Access property to **Yes** and set the **Web Browser access** field in the User Details for your user account to **-- System Default --**.
- Set the **Web Browser access** field in the User Details for your user account to **Yes**.

## License Expiration

If you log in to the Controller and your Controller license is about to expire within one week, the following informational message displays in the [Console](#):

```
Universal Controller license for node <node_id> will expire in N days.  
Please contact Stonebranch customer support to avoid service interruption.
```

If you log in to the Controller and your Controller license already has expired, the following error message displays in the [Console](#):

```
Universal Controller license for node <node_id> has expired and the Controller has been suspended.  
Licensed Number of Days: N  
Actual Number of Days: N  
Please contact Stonebranch customer support to restore services.
```

In each case, the Console will remain open until you manually [close](#) it.

Additionally, if you have configured the Controller for [System Notifications](#), system notifications are sent when the Controller license will expire in seven days and if the license already has expired.

### Note



If your license expires, you will not be able to run any tasks.

## Login Disclaimer

The [Login Disclaimer](#) Universal Controller system property lets you define multi-lines of free-form text that will display at the bottom of the [Universal Automation Center Login page](#) when you attempt to login.

### Note



HTML is not permitted and will be escaped accordingly.

For example:

stonebranch

Username:

Password:

Login

This system is the property of (company and name) and for company use.  
Use of this system constitutes consent to monitoring.  
Monitoring may be conducted for the protection against improper or unauthorized use or access.

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## Login Notification

The [Login Notification](#) Universal Controller system property lets you define a message that displays in the [Console](#) when you login to the Controller.

The screenshot displays the Universal Automation Center Console interface. At the top, the system clock shows 2020-03-09 14:25 -0400 and the user is logged in as Administrator. The left sidebar contains a tree view of navigation items: Task Instances (Activity, Task Instances, History), Triggers (All Triggers, Active Triggers, Cron Triggers, Time Triggers, Manual Triggers, Temporary Triggers, Agent File Monitor Triggers, Task Monitor Triggers, Variable Monitor Triggers, Email Monitor Triggers, Application Monitor Triggers, Composite Triggers, Forecasts, Forecast Calendar), Tasks (All Tasks, Workflow Tasks, Linux/Unix Tasks, Windows Tasks, z/OS Tasks, Universal Command Tasks, SAP Tasks, PeopleSoft Tasks, File Transfer Tasks, Manual Tasks, Timer Tasks, SQL Tasks, Stored Procedure Tasks, Email Tasks, Web Service Tasks, Task Monitors, Agent File Monitors, Remote File Monitors, System Monitors, Variable Monitors, Email Monitors, Application Control Tasks), and Universal Tasks.

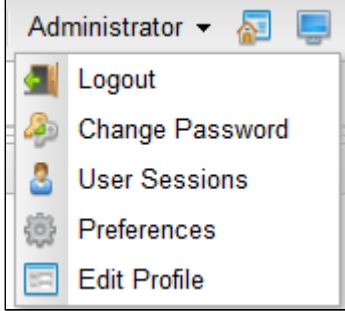
The main dashboard area is titled "Dashboards" and contains several panels:

- Active Task Instances By Status:** A large empty rectangular area.
- System Details:** A panel showing information for a Cluster Node { Active }:
  - Node Id: qa-cntrl-mysql.stone.branch:8080-qa\_cntrl
  - Node Mode: Active
  - Node Uptime: 2 Hours 39 Minutes 43 Seconds
  - Node Time: 2020-03-09 14:24:45 -0400 (America/New\_...)
  - Release: { 6.8.0.0 build.175 }
  - Memory: { 248.92 MB (24.68%) / 1008.50 MB }
  - License: { Pre 6.8 License Migrated. }
  - Database: { MySQL }
- Agent Status:** A pie chart showing a large red section (approximately 75%) and a smaller green section (approximately 25%).
- Cluster Node Status:** A solid green circle.
- OMS Server Status:** A solid green circle.

At the bottom, the "Universal Automation Center Console" window displays a log entry: 2020-03-09 02:23:43 PM Planned outage on 3/1.

## Logging Out

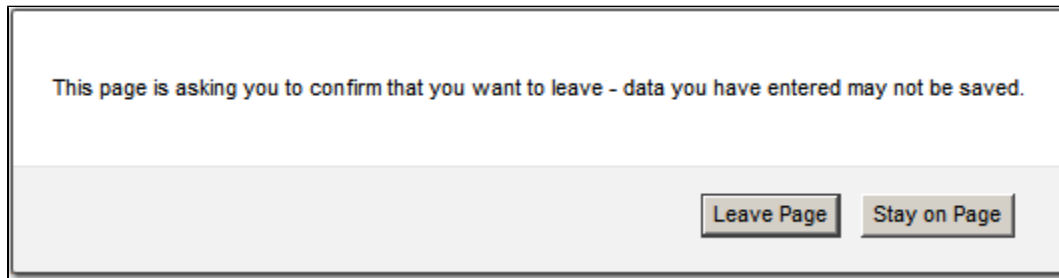
To log out of your Universal Controller session:

<b>Step 1</b>	<p>On the <a href="#">User Task Bar</a>, click the <a href="#">User Actions</a> drop-down list arrow to display a menu of user actions.</p> 
<b>Step 2</b>	<p>Click <b>Logout</b>. You are logged out of this session, and the <a href="#">Universal Automation Center Login page</a> displays.</p>

## Exiting without Logging Out


As a best practice, we recommend that you always end your Universal Controller session by logging out before closing the browser or navigating away from the user interface.

If you attempt to close the browser or navigate away from the user interface before logging out, and the [Confirm Exit](#) Universal Controller system property is set to **true**, the following pop-up dialog displays:



- Click **Leave Page** to navigate away from the Universal Controller user interface.
- Click **Stay on Page** to remain in the Universal Controller user interface.

Note

 This dialog may differ from browser to browser.

## SAML Single Logout

For information on SAML Single Logout, see [Single Logout](#) in [Single Sign-On Settings](#).

## Log File and Audits

All user login and logout activity, whether via the user interface or a Universal Controller [remote interface](#), is [logged](#) and [audited](#) (as a single [audit type](#): User Login).

### Log File Messages

Log file messages for login activity are in the following format:

```
timestamp(internal)login activity<user=user name, ipaddr=IP address>
```

For example:

```
2015-04-16-11:16:26:391 -0400 INFO [http-bio-8080-exec-5] Login OK <user=ops.admin, ipaddr=192.55.44.123>
2015-04-16-11:17:20:208 -0400 INFO [http-bio-8080-exec-10] Login Failed <user=ops.admin, ipaddr=192.55.44.123>
2015-04-16-11:16:57:442 -0400 INFO [http-bio-8080-exec-11] Logout OK <user=ops.admin, ipaddr=192.55.44.123>
```

### Audit Messages

Audit messages for login activity are in the following format:

```
login activity<user=user name, ipaddr=IP address>
```

For example:

```
LOGIN <user=stonebranch-user-01, ipaddr=192.55.44.123>
```

#### Note



The IP Address of the user is not logged or audited for login activity via the [Command Line Interface \(CLI\)](#).

## User Sessions

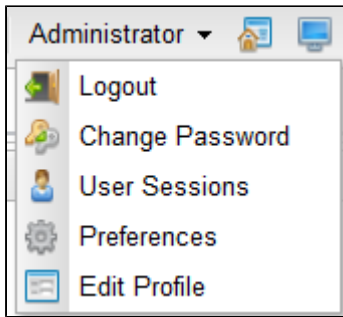
#### Note



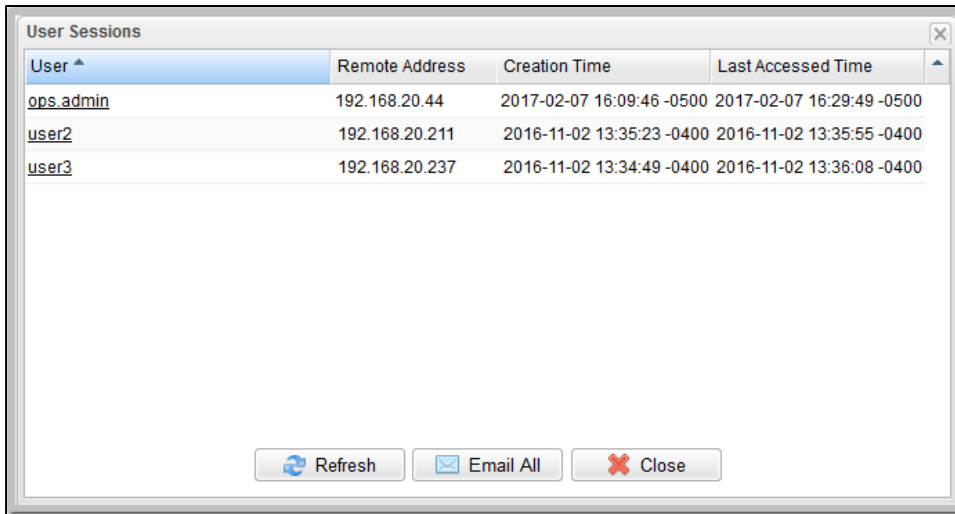
This action requires the [ops\\_admin](#) role or the [ops\\_user\\_admin](#) role.

To display a list of currently authenticated user sessions (logged in users):

**Step 1** On the **User task bar**, click the **User Actions** drop-down list arrow to display a menu of user actions.



**Step 2** Click **User Sessions** to display the User Sessions list of currently authenticated user sessions.



For each logged in the user, the User Sessions list provides the following columns of information:

Column	Description
User	User Id of the user. (You can click a User Id to display the <a href="#">User Details</a> for that user.)
Remote Address	Address of the machine from where the user logged in.
Creation Time	Date and time that the user initially logged in; in other words, when the user session was created.
Last Accessed Time	Last date and time that the client (browser) sent a request associated with this user session..

Note



If you have configured Tomcat for never timing out sessions or for an exceptionally long session timeout - neither of which is recommended - this can result in a large number of lingering sessions if users are not logging out of the web application prior to closing their browser. As a precaution, if the Universal Controller detects more than 1,000 authenticated sessions, only those sessions with a Last Accessed Time of less than 24 hours ago will be displayed.

To view an up-to-date list of the currently logged in users, click the **Refresh button**; to close the list, click the **Close** button.

From the Users Sessions list, you also can:

- [Send an Email](#) to one or more (or all) logged in users.
- [Expire the user session](#) of one or more users.

Note



If the following error appears in the [Console](#) while you are using the User Sessions feature, you may need to manually configure the `opwise.mbean.catalina.manager.name` Universal Controller start-up property:

```
Universal Controller not configured for user session operations.
```

## Send an Email to Logged In Users

From the User Sessions list, you can send an Email to:

- [All users](#) on the list.
- [One or more users](#) on the list.

The Controller will auto-generate the email Subject in the following format:

```
Message from system_identifier Universal Controller Administrator (user_id@cluster_node_id)
```

The Reply-To address for the email will be the email address of the sender.

An administrator must ensure that an [Email Connection](#) exists with the Use for System Notifications option enabled. The Email Address specified in the [Email Connection Details](#) will appear as the From email address.

Note

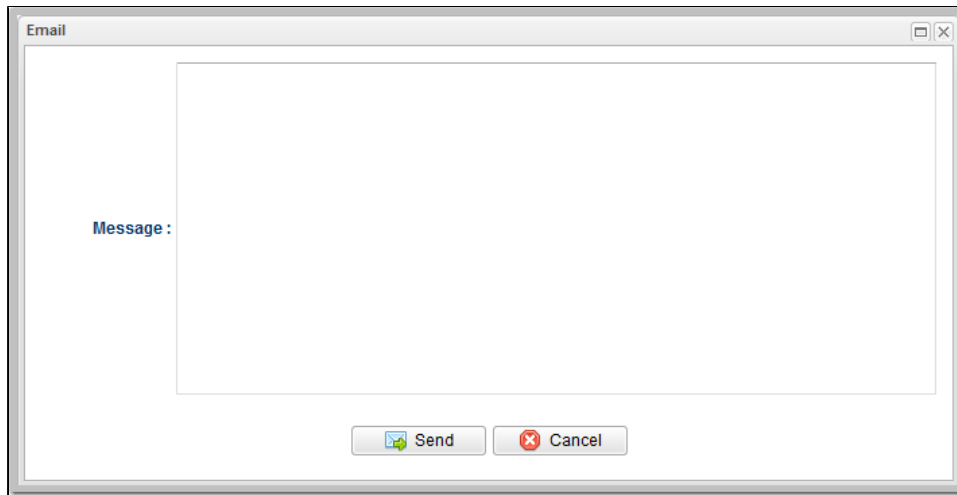


For local user accounts, each user must have assigned a valid email address.

For AD/LDAP synchronized user accounts, each synchronized user must have a valid email address mapped to their user record. (By default, this should be true.)

## Send an Email to All Logged In Users

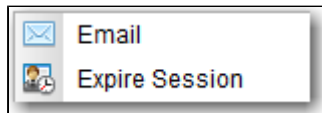
**Step 1** Click the **Email All** button on the [User Sessions](#) list. An Email pop-up dialog displays.

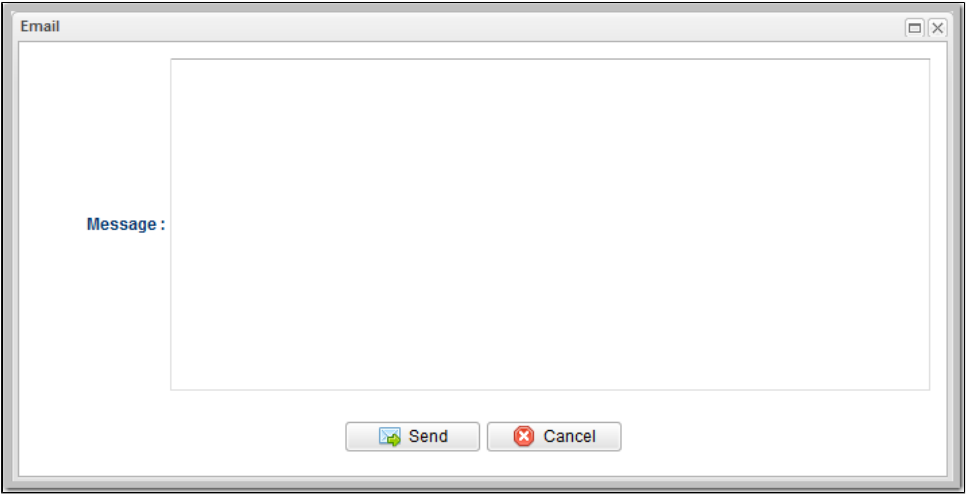


**Step 2** Enter a **Message** and click the **Send** button.

### Send an Email to One or More Logged In Users

**Step 1** Select one or more users on the User Sessions list and right-click any of the selected users. The User Sessions actions menu displays:



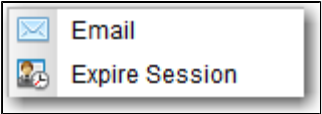
<p><b>Step 2</b></p>	<p>Click <b>Email</b> to display an Email pop-up dialog.</p> 
<p><b>Step 3</b></p>	<p>Enter a <b>Message</b> and click the <b>Send</b> button.</p>

## Expire User Sessions

Note

 This action requires the [ops\\_admin](#) role or the [ops\\_user\\_admin](#) role.

To expire (log out) one or more currently authenticated user sessions (logged in users):

<p><b>Step 1</b></p>	<p>Click <b>User Sessions</b> in the <a href="#">User Actions</a> drop-down list on the <a href="#">User Task Bar</a>. The User Sessions list then displays a list of currently authenticated user sessions.</p>
<p><b>Step 2</b></p>	<p>Select one or more users on the list and right-click any of the selected users. The User Sessions actions menu displays:</p> 
<p><b>Step 3</b></p>	<p>Click <b>Expire Session</b> to expire the user sessions of the selected users. A confirmation pop-up then displays.</p>
<p><b>Step 4</b></p>	<p>Click <b>OK</b> to confirm that you want to expire the selected user sessions.</p>



# User Interface

- [Overview](#)
- [Home Page](#)
  - [User Interface Details](#)
- [Available Services](#)
- [Global Search](#)
  - [Performing a Global Search:](#)
- [Customizing the Banner](#)
  - [Changing the Banner Logo](#)
- [Drop-Down Lists](#)
- [Console](#)
  - [Console Actions](#)
- [Tabs](#)
  - [Pinning Tabs](#)
  - [Tab Picker](#)
  - [Record Details as Tabs](#)
- [Additional Information](#)

## Overview

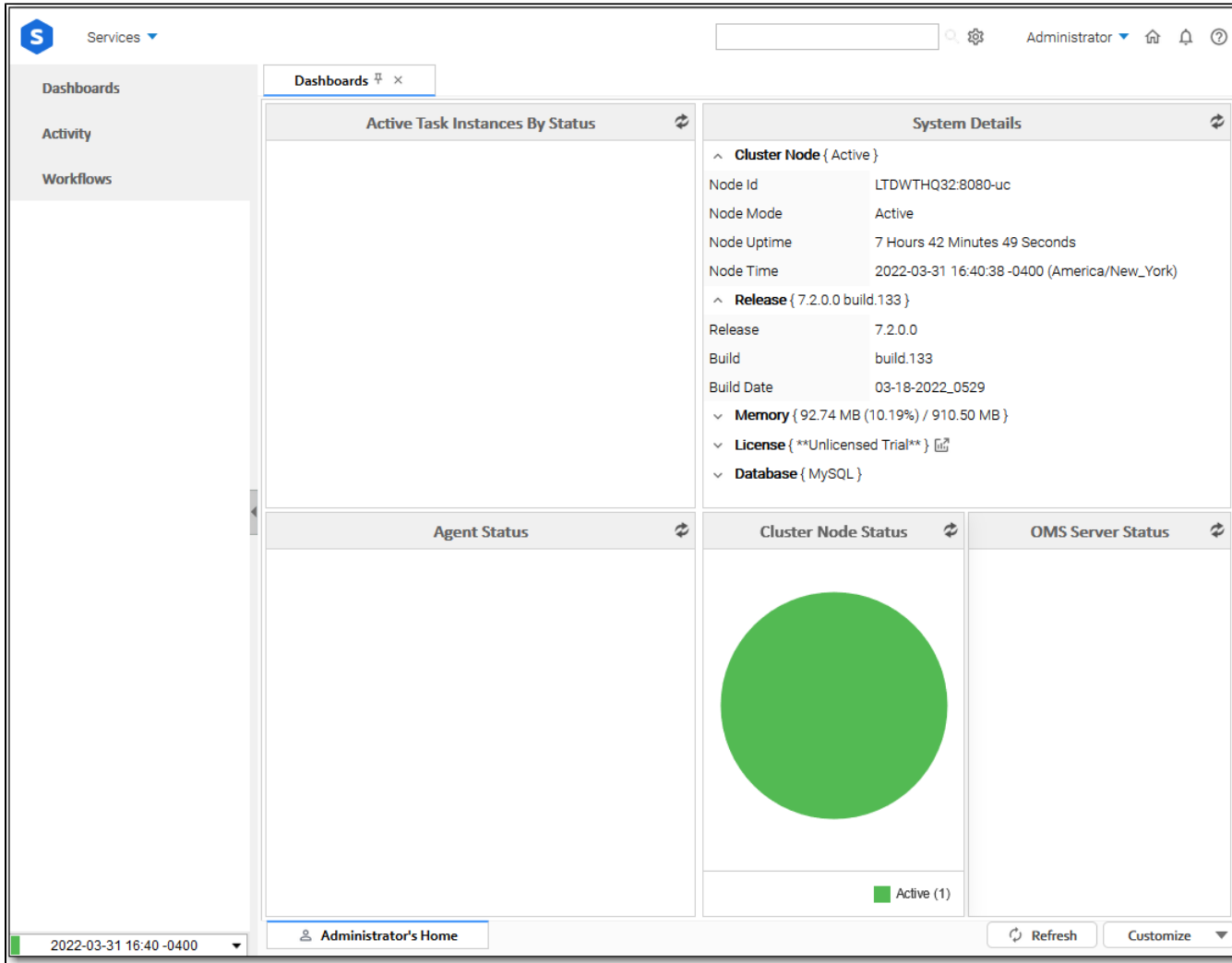
The Universal Controller 7.2.x user interface is comprised of two basic elements:

- [Home page](#)
- [Services](#)

## Home Page




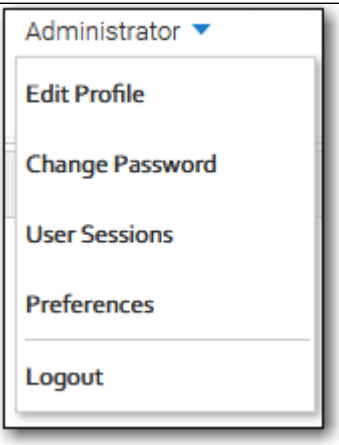

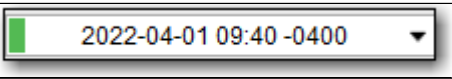
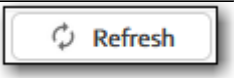
When you log in to the Universal Controller 7.2.x user interface, your Universal Controller home page displays.

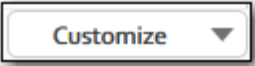

The home page contains the [Home Dashboard](#) and a panel on the left side of the page that lists any [Services](#) that you had selected for easy access.



## User Interface Details

In addition to the Home Dashboard and user-selected links to areas in Services, the Home Page - and all pages accessed via Services - contains the following information (except where noted).

Section	Description
	Link to the Stonebranch website.
	Link to the Universal Controller <a href="#">Services</a> available in the user interface.
	Search field that enables you to search for a Name, Description, and Member of Business Services across multiple record types. The Search icon lets you select which field types to search for.
	User-specific information for the logged in user. <ul style="list-style-type: none"> <li>• Edit Profile  <a href="#">User Details</a> for this user.</li> <li>• Change Password  <a href="#">Change Password</a> dialog for this user.</li> <li>• User Sessions                          List of currently authenticated <a href="#">user sessions</a>.</li> <li>• Preferences                          List of <a href="#">User Preferences</a> for this user.</li> <li>• Logout                          Logs out this user from the user interface.</li> </ul>
	Links to: <ul style="list-style-type: none"> <li>• Home Dashboard</li> <li>• <a href="#">Console</a></li> <li>• Universal Controller 7.2.x user documentation</li> </ul>
	Time and node status (System Details).
	Home page only; Refreshes the information displayed on this page.

	<p>Home page only:</p> <ul style="list-style-type: none"><li>• New Creates a new Dashboard.</li><li>• Edit Edits the Dashboard</li><li>• Delete Delete the Dashboard</li><li>• Set As Default Set the Dashboard as the default Dashboard.</li><li>• Copy Creates a copy of the Dashboard.</li><li>• Visibility Sets the visibility of the Dashboard.</li></ul> <p>Note  You cannot Edit or Delete the Home Dashboard.</p>
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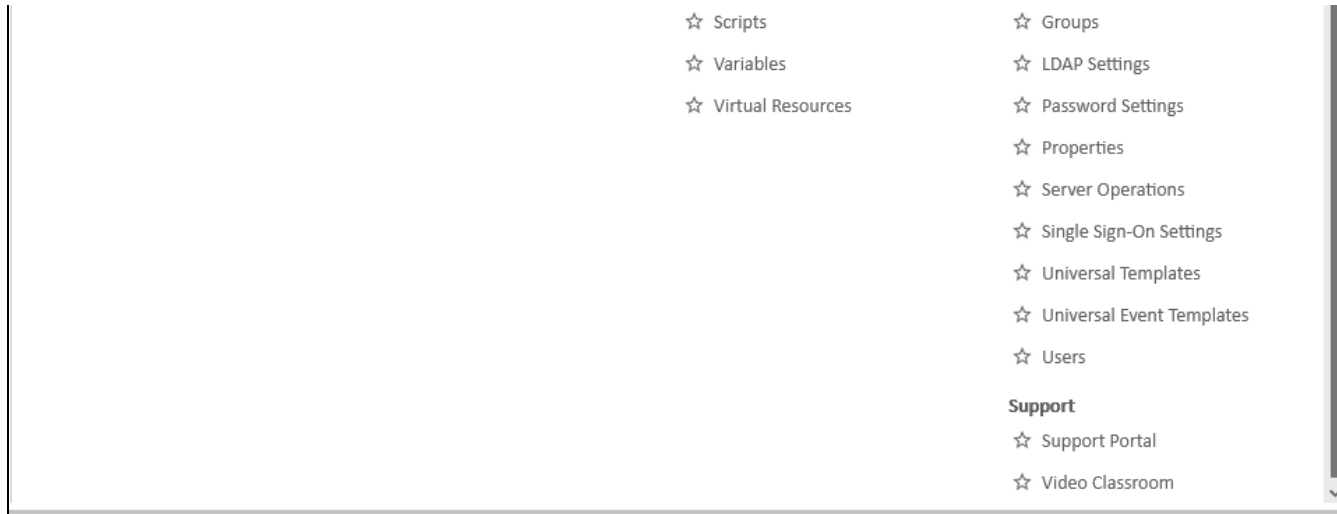
## Available Services

All of the record types are under Available Services

To add a record type to the home page navigation panel, click the star icon ( U ) next to the record type in Available Services

To create a record for a record type while in Available Services, click the new icon ( + ) next to that record type

Available Services			
☆ Dashboards			
☆ Activity			
☆ Workflows			
<b>Instances</b>			
☆ Task Instances			
☆ History			
<b>Tasks</b>			
☆ All Tasks			
☆ Linux/Unix Tasks			
☆ Windows Tasks			
☆ z/OS Tasks			
☆ Universal Command Tasks			
☆ File Transfer Tasks			
☆ Manual Tasks			
☆ Timer Tasks			
☆ SQL Tasks			
☆ Stored Procedure Tasks			
☆ Email Tasks			
☆ Web Service Tasks			
☆ Recurring Tasks			
☆ Application Control Tasks			
	<b>Integrations</b>		
	Integration Hub	↓	
	Import Integration Template	↑	
	☆ PeopleSoft Tasks		
	☆ SAP Tasks		
		<b>Triggers</b>	
		☆ All Triggers	
		☆ Active Triggers	
		☆ Cron Triggers	
		☆ Time Triggers	
		☆ Manual Triggers	
		☆ Temporary Triggers	
		☆ Agent File Monitor Triggers	
		☆ Task Monitor Triggers	
		☆ Variable Monitor Triggers	
		☆ Email Monitor Triggers	
		☆ Universal Monitor Triggers	
		☆ Application Monitor Triggers	
		☆ Composite Triggers	
		<b>Monitors</b>	
		☆ Task Monitors	
		☆ Agent File Monitors	
		☆ Remote File Monitors	
		☆ System Monitors	
		☆ Variable Monitors	
		☆ Email Monitors	
		☆ Universal Monitors	
		<b>Calendars</b>	
		☆ Calendars	
		☆ Custom Days	
		<b>Forecasts</b>	
		☆ Forecasts	
		☆ Forecast Calendar	
		<b>Other</b>	
		☆ Credentials	
		☆ Email Templates	
		<b>Reports</b>	
		☆ Reports	
		☆ Widgets	
		☆ Colors	
		<b>Lifecycle Management</b>	
		☆ Bundles	
		☆ Promotion Targets	
		☆ Promotion History	
		☆ Promotion Schedules	
		<b>Agents</b>	
		☆ All Agents	
		☆ Linux/Unix Agents	
		☆ Linux/Unix Agent Clusters	
		☆ Windows Agents	
		☆ Windows Agent Clusters	
		☆ z/OS Agents	
		<b>Connections</b>	
		☆ Email Connections	
		☆ Database Connections	
		☆ SAP Connections	
		☆ PeopleSoft Connections	
		<b>System</b>	
		☆ Applications	
		☆ Cluster Nodes	
		☆ OMS Servers	
		☆ SNMP Managers	
		<b>Administration</b>	
		☆ Audits	
		☆ Business Services	
		☆ Data Backup / Purge	
		☆ Filters	



## Global Search


Global Search enables you to search the user interface for Name, Description, and/or Member of Business Services for the following record types:

- Agent
- Agent Cluster
- Application
- Bundle
- Bundle Target
- Calendar
- Credentials
- Database Connection
- Email Connection
- Email Template
- OMS Server
- PeopleSoft Connection
- SAP Connection
- Script
- SNMP Manager
- Task
- Trigger
- Variable
- Virtual Resource

You can search for:

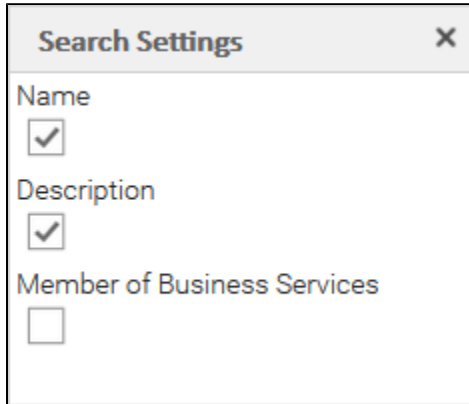
- Exact field:  
Enter a specific record name.
- Partial field:  
Enter partial text and use a question mark ( ? ) to replace any single character.
- Wildcard:  
Use a wildcard ( \* ) to match one or more matching values (for example: **t\***, **Test\***, **\*est\***).

Note

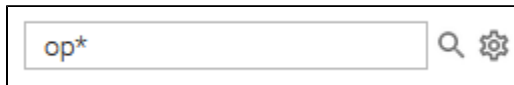
 You can receive search results only for records for which you have read access.

## Performing a Global Search:

1. Click the Settings icon on the [User Task Bar](#) to configure which fields to search. By default, the Name and Description fields are selected.



2. In the Search field, enter the text to search for. (Search text is not case sensitive.)



3. Click the Search icon to perform the search.

A list of any search results then displays.

2 Matches				
Name	Description	Type	Updated By	Updated
<input type="checkbox"/> Opwise - Default Linux/Unix Cluster		Agent Cluster	ellen.ulster	2019-12-06 16:42:21 -0500
<input type="checkbox"/> Opwise - Default Windows Cluster		Agent Cluster	ops.system	2009-06-10 14:08:41 -0400


## Customizing the Banner

You can customize the Universal Automation Center banner that displays across the top of the page by changing the banner logo.

### Changing the Banner Logo

<b>Step 1</b>	<p>Copy the logo file that you want to use in the banner to the <code>uc_images</code> directory directly under your Tomcat home/installation directory: <code>../tomcat/uc_images</code>. Valid logo file extensions are <code>.png</code>, <code>.jpg</code>, and <code>.gif</code>. The logo should be a maximum 298px x 48px. Any logo larger than these dimensions will be scaled automatically; however, it is recommended that keep the logo within these dimensions.</p> <ul style="list-style-type: none"> <li>• If the <code>uc_images</code> directory does not exist, create it.</li> <li>• If you have a <a href="#">High Availability</a> system, you must copy the logo to the <code>uc_images</code> directory for each Universal Controller cluster node in the system.</li> </ul>
<b>Step 2</b>	<p>Login to the Universal Controller (or any Controller cluster node in a High Availability system) and update the <a href="#">Banner Logo</a> Universal Controller system property to the name of the logo file (excluding path) that you copied to the <code>uc_images</code> directory. The logo will be deployed automatically to the Controller. In a High Availability system, where an updated property on one cluster node applies to all cluster nodes (since they share the same database), the logo file will be deployed automatically on initial application request.</p>
<b>Step 3</b>	<p>If you want the logo to link to a web resource, enter the URL for the web resource in the <a href="#">Banner Logo URL</a> Universal Controller system property.</p>

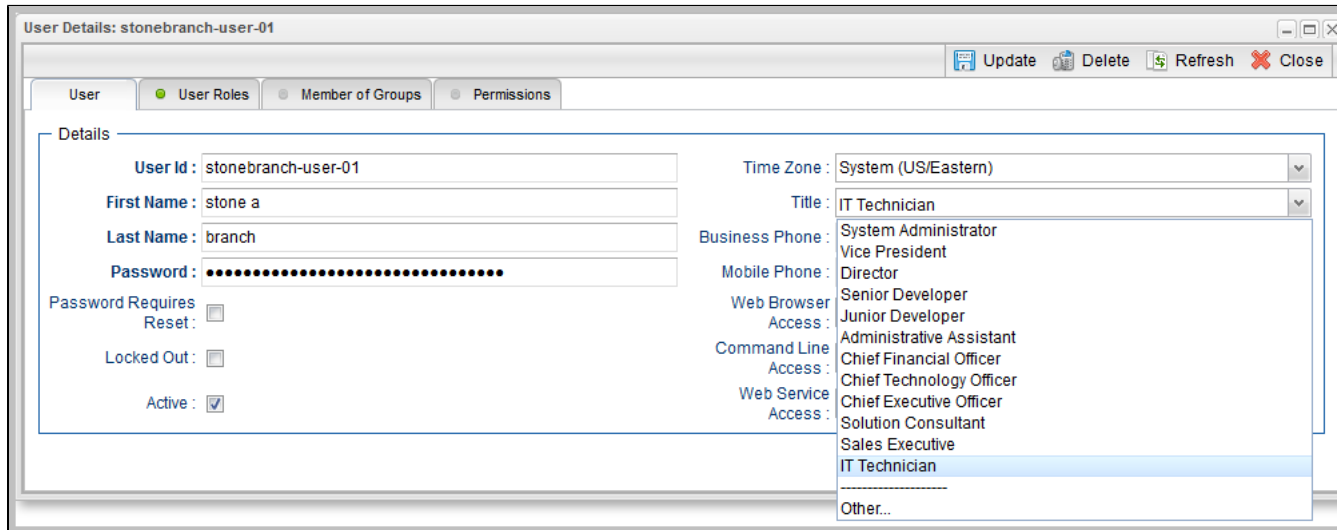
Note

 If you update the currently configured banner logo file in the `uc_images` folder, as long as the banner logo file size has changed, it will be redeployed automatically. If you do not see the updated banner logo from the user interface, try running the [Clear Server Cache](#) server operation and/or clearing your browser cache.

## Drop-Down Lists

Many record Details contain drop-down lists of available values for specific fields.

For example, the record Details for a User contains a drop-down list of titles that can be assigned to the User:



To select a value from a drop-down list, either:

- Click the drop-down list arrow and then click a value.
- Begin entering the name of a value in the drop-down list field. A list of values that match your entry then displays. Click a displayed value.

## Console

The Console contains informational and error messages regarding recent Controller activity.

For example:






The Console opens automatically to display error ( **x** ) messages, and you can set the Console to open automatically to display information ( **i** ) messages (via one of four [user preferences](#) that allow you to control the Console display).

### Note

Error messages related to specific fields are displayed next to the fields themselves in the record Details, not in the Console.

You also can open the Console manually at any time by clicking the [Universal Automation Center Console icon](#) on the [User Task Bar](#).

## Console Actions

Action	Icon	Description
Select and Copy	n/a	Select message text either of three ways: <ul style="list-style-type: none"> <li>• Drag your cursor across any of the text.</li> <li>• Double-click a single entry in the text to select only that entry.</li> <li>• Triple-click anywhere in the message text to select all of the text.</li> </ul> Use <b>Ctrl+C</b> and <b>Ctrl+V</b> to copy and paste the selected text. You also can select and copy text this way from the Print Preview pop-up (see <b>Print</b> in this table).
Print		Click the Print icon at the top of the Console to display a Print Preview pop-up, and then click the <b>Print</b> button.
Trash		Click the Trash icon at the top of the Console to empty the contents of the Console.
Close		Close the Console either by: <ul style="list-style-type: none"> <li>• Clicking the Close icon at the top of the Console.</li> <li>• Double-clicking the Console header.</li> </ul>

## Tabs

Every page in the user interface displays, when selected, under a tab at the top of the page. The tab for the page currently being viewed is white; all other tabs are gray.

When you log in to the Controller, the [Home dashboard](#) displays under a **Dashboards** tab. The Home dashboard - as well as the [Activity Monitor](#) and [Dashboard Details](#) - remain open throughout your session unless you manually close them by clicking the **x** icon in the tab itself. The tabs for those pages otherwise remain at the top of the screen so that you can quickly return to them at any time.

For example:

The screenshot shows the Universal Controller interface. At the top, there are tabs for 'Dashboards', 'Linux/Unix Tasks', and 'Windows Tasks'. Below the tabs, there is a dropdown menu for '5 Linux/Unix Tasks' and a search filter 'stonebranch-filter-01'. A table lists five tasks with columns for Name, Description, Command or Script, Updated By, and Updated. Below the table, there is a 'Linux/Unix Task Details' section with tabs for 'Linux/Unix Task', 'Variables', 'Actions', 'Virtual Resources', 'Mutually Exclusive', 'Instances', 'Triggers', 'Notes', and 'Versions'. The 'Linux/Unix Task' tab is active, showing a 'General' section with fields for Name, Description, Member of Business Services, Resolve Name Immediately, Hold on Start, Virtual Resource Priority, Time Zone Preference, and Hold Resources on Failure. Below the 'General' section is an 'Agent Details' section with fields for Cluster, Agent, Credentials, Agent Variable, and Credentials Variable.

Name	Description	Command or Script	Updated By	Updated
stonebranch-linuxunixtask-01		Command	ops.admin	2020-10-06 14:58:45 -0400
stonebranch-linuxunixtask-02		Command	ops.admin	2020-01-07 10:17:17 -0500
stonebranch-linuxunixtask-03		Command	ops.admin	2020-01-07 10:17:40 -0500
stonebranch-linuxunixtask-04		Command	ops.admin	2020-01-07 10:17:54 -0500
stonebranch-linuxunixtask-05		Command	ops.admin	2020-01-07 10:18:11 -0500

If you select a page in the [Services](#) while viewing Dashboards, Activity Monitor, or Server Operations, a new tab will open for that page. The Dashboards, Activity Monitor, and Server Operations tabs are **pinned** automatically to the top of the page and will remain open if you navigate from them.

If you select a page in the [Services](#) while viewing any other page, the [Tabs Pinned Automatically](#) user preference specifies whether or not that page is pinned.

## Note



When you close the tab for the page currently being viewed, you return to the tab for the previous page that you viewed, not the tab for the page that you last opened.

## Pinning Tabs

You can pin tabs to the top of the page so that the pinned page displays even if you select other pages to display. You also can unpin any pinned tabs at any time (see the [Tabs](#) action menu).

The following tabs are pinned automatically and will not close unless you manually close them either by clicking the **x** icon on the tab or close them via the [Tabs](#) action menu.

- Dashboards
- Activity
- Server Operation

Pinned tabs are identified with a pin icon next to the tab name.

Any tab pinned during the current user session will display as pinned when the tab is opened again in a future user session, until the tab is unpinned.

## Tab Picker

If you open more tabs that can be displayed on your screen, tab picker icons display that let you scroll back and forth among the tabs and select any tab from a drop-down list

<	Scroll left through the tabs.
>	Scroll right through the tabs.
v	Display a drop-down list of all open tabs.

If there are open tabs for Workflow Editors or Workflow Monitors, the drop-down list will identify the name of each Workflow being edited or monitored.

For example:

The screenshot displays the Universal Controller dashboard with several panels and a navigation menu. At the top, there are tabs for 'Dashboards', 'Workflow Tasks', 'Linux/Unix Tasks', 'Windows Tasks', 'z/OS Tasks', 'Universal Command Tasks', 'SAP Tasks', and 'File Transfer Tasks'. The main content area is divided into several sections:

- Active Task Instances By Status:** A large empty panel on the top left.
- Cluster Node { Active }:** A panel on the top right showing details for a node with ID 'qa-cntlr-mysql.stor'. It lists 'Node Mode' as 'Active', 'Node Uptime' as '1 Day 2 Hours 30 M', and 'Node Time' as '2020-04-22 13:48:0'. Below this are expandable sections for 'Release { 7.0.0.0 build.22 }', 'Memory { 279.28 MB (27.41%) / 1019.00 }', 'License { Pre 6.8 License Migrated. }', and 'Database { MySQL }'.
- Agent Status:** A pie chart on the bottom left showing 4 Offline agents (red) and 1 Active agent (green).
- Cluster Node Status:** A green circle on the bottom middle indicating 1 Active node.
- Cluster Node Status:** A green circle on the bottom right indicating 1 Connected node.

On the right side, a navigation menu is visible with the following items: Dashboards, Workflow Tasks, Linux/Unix Tasks, Windows Tasks, z/OS Tasks, Universal Command Tasks, SAP Tasks, File Transfer Tasks, Manual Tasks, Timer Tasks, SQL Tasks, Email Tasks, Web Service Tasks, Task Monitors, Remote File Monitors, System Monitors, Variable Monitors, Email Monitors, and Workflow Editor: stonebranch-workflow-01. At the bottom of the dashboard, there is an 'Administrator's Home' button, a 'Refresh' button, and a 'Customize' dropdown menu.

## Record Details as Tabs

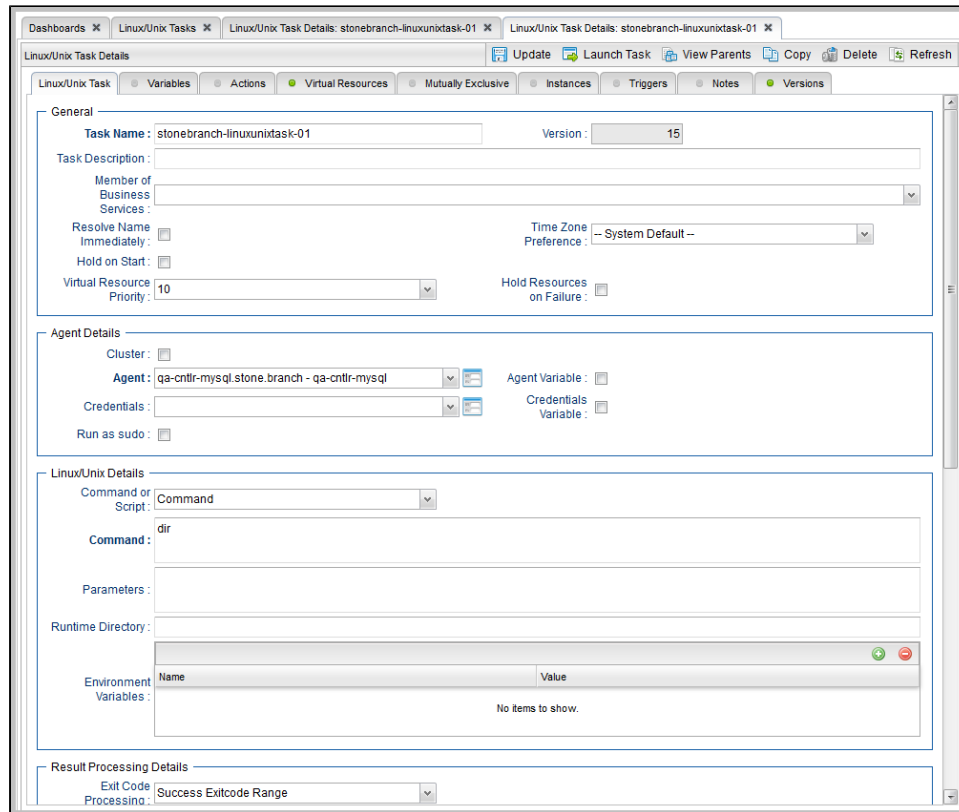
You also can display record Details as tabs at the top of a page

- Step 1** From a [record list](#), either:
- Right-click a record in the list.
  - [Open a record](#) and right-click in the record Details.
- Step 2** In the [Action menu](#), click **Open in Tab**. The record Details display under a tab at the top of the page.
- If you click **Open in Tab** for an open record, the record is closed and displays only under the tab.

**Step 3** If you want to open the same record or another record under another tab, repeat Steps 1 and 2.

You can open any number and combination of tabs from one or more lists in the user interface.

For example:



## Additional Information

The following pages provide additional information for the Universal Controller user interface:

- [Home Dashboard](#)
- [Services](#)
- [Records](#)
- [Record Lists](#)
- [Filters](#)
- [Action Menus](#)
- [User Preferences](#)
- [Wildcards and Regular Expressions](#)
- [Access Keys](#)

# Services

- [Overview](#)
- [Available Services](#)
  - [Adding a Service to the Favorites](#)
- [Recently Visited](#)
- [Available Services](#)
- [Available Services Refresh](#)

## Overview

The Services area of the user interface provides access to all areas of the user interface.

Recently Visited	Available Services			
<ul style="list-style-type: none"> <li>Workflows</li> <li>Properties</li> <li>Dashboards</li> <li>Server Operations</li> </ul>	<ul style="list-style-type: none"> <li>★ Dashboards</li> <li>★ Activity</li> <li>★ Workflows</li> </ul> <p><b>Instances</b></p> <ul style="list-style-type: none"> <li>☆ Task Instances</li> <li>☆ History</li> </ul> <p><b>Tasks</b></p> <ul style="list-style-type: none"> <li>☆ All Tasks</li> <li>☆ Linux/Unix Tasks</li> <li>☆ Windows Tasks</li> <li>☆ z/OS Tasks</li> <li>☆ Universal Command Tasks</li> <li>☆ File Transfer Tasks</li> <li>☆ Manual Tasks</li> <li>☆ Timer Tasks</li> <li>☆ SQL Tasks</li> <li>☆ Stored Procedure Tasks</li> <li>☆ Email Tasks</li> <li>☆ Web Service Tasks</li> <li>☆ Recurring Tasks</li> <li>☆ Application Control Tasks</li> </ul>	<p><b>Integrations</b></p> <ul style="list-style-type: none"> <li>Integration Hub</li> <li>Import Integration Template</li> </ul> <hr/> <ul style="list-style-type: none"> <li>☆ PeopleSoft Tasks</li> <li>☆ SAP Tasks</li> </ul>	<p><b>Triggers</b></p> <ul style="list-style-type: none"> <li>☆ All Triggers</li> <li>☆ Active Triggers</li> <li>☆ Cron Triggers</li> <li>☆ Time Triggers</li> <li>☆ Manual Triggers</li> <li>☆ Temporary Triggers</li> <li>☆ Agent File Monitor Triggers</li> <li>☆ Task Monitor Triggers</li> <li>☆ Variable Monitor Triggers</li> <li>☆ Email Monitor Triggers</li> <li>☆ Universal Monitor Triggers</li> <li>☆ Application Monitor Triggers</li> <li>☆ Composite Triggers</li> </ul> <p><b>Monitors</b></p> <ul style="list-style-type: none"> <li>☆ Task Monitors</li> <li>☆ Agent File Monitors</li> <li>☆ Remote File Monitors</li> <li>☆ System Monitors</li> <li>☆ Variable Monitors</li> <li>☆ Email Monitors</li> <li>☆ Universal Monitors</li> </ul> <p><b>Calendars</b></p> <ul style="list-style-type: none"> <li>☆ Calendars</li> <li>☆ Custom Days</li> </ul> <p><b>Forecasts</b></p> <ul style="list-style-type: none"> <li>☆ Forecasts</li> <li>☆ Forecast Calendar</li> </ul> <p><b>Other</b></p> <ul style="list-style-type: none"> <li>☆ Credentials</li> <li>☆ Email Templates</li> <li>☆ Scripts</li> <li>☆ Variables</li> <li>☆ Virtual Resources</li> </ul>	<p><b>Reports</b></p> <ul style="list-style-type: none"> <li>☆ Reports</li> <li>☆ Widgets</li> <li>☆ Colors</li> </ul> <p><b>Lifecycle Management</b></p> <ul style="list-style-type: none"> <li>☆ Bundles</li> <li>☆ Promotion Targets</li> <li>☆ Promotion History</li> <li>☆ Promotion Schedules</li> </ul> <p><b>Agents</b></p> <ul style="list-style-type: none"> <li>☆ All Agents</li> <li>☆ Linux/Unix Agents</li> <li>☆ Linux/Unix Agent Clusters</li> <li>☆ Windows Agents</li> <li>☆ Windows Agent Clusters</li> <li>☆ z/OS Agents</li> </ul> <p><b>Connections</b></p> <ul style="list-style-type: none"> <li>☆ Email Connections</li> <li>☆ Database Connections</li> <li>☆ SAP Connections</li> <li>☆ PeopleSoft Connections</li> </ul> <p><b>System</b></p> <ul style="list-style-type: none"> <li>☆ Applications</li> <li>☆ Cluster Nodes</li> <li>☆ OMS Servers</li> <li>☆ SNMP Managers</li> </ul> <p><b>Administration</b></p> <ul style="list-style-type: none"> <li>☆ Audits</li> <li>☆ Business Services</li> <li>☆ Data Backup / Purge</li> <li>☆ Filters</li> <li>☆ Groups</li> <li>☆ LDAP Settings</li> <li>☆ Password Settings</li> <li>☆ Properties</li> <li>☆ Server Operations</li> <li>☆ Single Sign-On Settings</li> <li>☆ Universal Templates</li> <li>☆ Universal Event Templates</li> </ul>

- ☆ Users
- Support**
- ☆ Support Portal
- ☆ Video Classroom

## Available Services

The Available Services area displays all services available to the logged in user.

### Adding a Service to the Favorites

To add a Service to the Favorites list on the user interface home page, click the white star next to the name of that Service. The star turns blue to signify that it has been added to the Favorites list.

To remove a service from the Favorites list, click the blue star next to the service in Available Services. The star turns from blue to white to signify that the service has been removed from the Navigator.

#### Note



If the Dashboards and Activity services are available to the logged in user, they will automatically be added to the Favorites list.

## Recently Visited

The Recently Visited list identifies items in Available Services that you have recently visited.

The most recently visited items are at the top of the list.

The [Services Recently Visited Limit](#) user preference specified how many recently visited items will display on the list.

## Available Services

Available Services provides access to all areas of the user interface.


Each navigation pane provides links to specific pages in the user interface, such as a record type or list. When you hover your cursor over a link, it is highlighted in gray. When you click a link, the highlight is removed.

The following tables provide a quick reference and links for each item in the Available Services.

Area	Menu Options	Description and Links
<b>Dashboards</b>		Access to all <a href="#">Dashboards</a> .
<b>Activity</b>		Access to the <a href="#">Activity Monitor</a> , which lists all <a href="#">active task instances</a> ; the data is automatically refreshed. From this list, you can view and edit any task instance. For non-Workflow task instances, you also can view output or rerun the task.
<b>Workflows</b>		Lists all <a href="#">Workflow</a> tasks in the Controller.
<b>Task Instances</b>		Multiple task instance lists.

	Task Instances	Lists the same <a href="#">task instances</a> as the Activity Monitor, but only for task instances for which there has been a status change or a modification to the task instance record within the last 7 days (an <b>Updated on Last 7 Days</b> filter has been pre-selected for this display). Also, unlike the Activity Monitor, the data is not automatically refreshed. Task Instances also allows you to view details about workflow instances – information that is not available from the Activity Monitor.
	History	Lists a <a href="#">history</a> of completed task instances with a status in an "end state" (SUCCESS, FINISHED, FAILED, CANCELLED, START FAILURE, SKIPPED). This allows you to track information about a specific task instance, including multiple runs. For example, Task A may have failed and was then re-run by a user. This task instance will appear twice on the History list, first for the time that it ran and failed and again for the time it was re-run to success.  From the History list, you can display read-only details about any task instance on the list.
<b>Tasks</b>		Lists of tasks for all task types; list of all tasks.
	All Tasks	Lists all existing <a href="#">tasks</a> of all types. From this list, you can view, edit, or launch any task on the list, or create a new task of any type.
	Workflow Tasks	Lists all <a href="#">Workflow tasks</a> . From this list, you can view, edit, or launch any Workflow, or create a new Workflow.
	Linux /Unix Tasks	Lists all <a href="#">Linux/Unix tasks</a> . From this list, you can view, edit, or launch any Linux/Unix task, or create a new Linux/Unix task.
	Windows Tasks	Lists all <a href="#">Windows tasks</a> . From this list, you can view, edit, or launch any Windows task, or create a new Windows task.
	z /OS Tasks	Lists all <a href="#">z/OS tasks</a> . From this list, you can view, edit, or launch any z/OS task, or create a new z/OS task.
	Universal Command Tasks	Lists all <a href="#">Universal Command tasks</a> . From this list, you can view, edit, or launch any Universal Command task, or create a new Universal Command task.
	File Transfer Tasks	Lists all <a href="#">File Transfer tasks</a> . From this list, you can view, edit, or launch any File Transfer task, or create a new File Transfer task.
	Manual Tasks	Lists all <a href="#">Manual tasks</a> . From this list, you can view, edit, or launch any Manual task, or create a new Manual task.
	Timer Tasks	Lists all <a href="#">Timer tasks</a> . From this list, you can view, edit, or launch any Timer task, or create a new Timer task.
	SQL Tasks	Lists all <a href="#">SQL tasks</a> . From this list, you can view, edit, or launch any SQL task, or create a new SQL task.
	Stored Procedure Tasks	Lists all <a href="#">Stored Procedure tasks</a> . From this list, you can view, edit, or launch any Stored Procedure task, or create a new Stored Procedure task.
	Email Tasks	Lists all <a href="#">Email tasks</a> . From this list, you can view, edit, or launch any Email task, or create a new Email task.
	Web Service Tasks	Lists all <a href="#">Web Service tasks</a> . From this list, you can view, edit, or launch any Web Service task, or create a new Web Service task.
	Recurring Tasks	Lists all <a href="#">Recurring tasks</a> . From this list, you can view, edit, or launch any Recurring task, or create a new Recurring task.
	Application Control Tasks	Lists all <a href="#">Application Control tasks</a> . From this list, you can view, edit, or launch any Application Control task, or create a new Application Control task.

<b>Integrations</b>		<p>Lists all <a href="#">Integrations</a>, categorized by Universal Task type. Each Universal Task type is based on an administrator-defined <a href="#">Universal Template</a>.</p> <p>(The area for Universal Tasks displays only if one or more Universal Templates - which the Controller lists as Universal Task types - have been created with one or more defined fields.)</p>
	Integration Hub	Provides access to the Stonebranch Integration Hub.
	Import Integration Template	Provides ability to import Integration Templates to the Controller.
	PeopleSoft Tasks	Lists all <a href="#">PeopleSoft tasks</a> . From this list, you can view, edit, or launch any PeopleSoft task, or create a new PeopleSoft task. Lists all <a href="#">PeopleSoft tasks</a> . From this list, you can view, edit, or launch any PeopleSoft task, or create a new PeopleSoft task.
	SAP Tasks	Lists all <a href="#">SAP tasks</a> . From this list, you can view, edit, or launch any SAP task, or create a new SAP task.
<b>Triggers</b>		List of triggers for each trigger type; list of all trigger triggers; forecast information.
	All Triggers	Lists all existing <a href="#">triggers</a> of all types. From this list, you can view and edit any trigger on the list, or create a new trigger of any type.
	Active Triggers	Lists all <a href="#">active (enabled) triggers</a> . From this list, you can view and edit any trigger on the list, or create a new trigger of any type.
	Cron Triggers	Lists all <a href="#">Cron triggers</a> . From this list, you can view or edit any Cron trigger, or create a new Cron trigger.
	Time Triggers	Lists all <a href="#">Time triggers</a> . From this list, you can view or edit any Time trigger, or create a new Time trigger.
	Manual Triggers	Lists all <a href="#">Manual triggers</a> . From this list, you can view or edit any Manual trigger, or create a new Manual trigger.
	Temporary Triggers	Lists all <a href="#">Temporary triggers</a> . From this list, you can view or edit any Temporary trigger, or create a new Temporary trigger.
	Agent File Monitor Triggers	Lists all <a href="#">Agent File Monitor triggers</a> . From this list, you can view or edit any Agent File Monitor trigger, or create a new Agent File Monitor trigger.
	Task Monitor Triggers	Lists all <a href="#">Task Monitor triggers</a> . From this list, you can view or edit any Task Monitor trigger, or create a new Task Monitor trigger.
	Variable Monitor Triggers	Lists all <a href="#">Variable Monitor triggers</a> . From this list, you can view or edit any Variable Monitor trigger, or create a new Variable Monitor trigger.
	Email Monitor Triggers	Lists all <a href="#">Email Monitor triggers</a> . From this list, you can view or edit any Email Monitor trigger, or create a new Email Monitor trigger.
	Application Monitor Triggers	Lists all <a href="#">Application Monitor triggers</a> . From this list, you can view or edit any Application Monitor trigger, or create a new Application Monitor trigger.

	Composite Triggers	Lists all <a href="#">Composite triggers</a> . From this list, you can view or edit any Composite trigger, or create a new Composite trigger.
	Forecasts	Lists information about every task in the Forecast Calendar, including tasks within a workflow launched by a trigger. See <a href="#">Forecast List</a> .
	Forecast Calendar	For Time, Temporary and Cron triggers: Lists a Forecast Calendar of all scheduled task instances for the next N days. The number (N) of days displayed in the forecast is specified using the <a href="#">Forecast Period in Days</a> Universal Controller system property (see <a href="#">Forecast Calendar</a> ).
<b>Monitors</b>		List of all Monitor task types.
	Task Monitors	Lists all <a href="#">Task Monitor tasks</a> . From this list, you can view, edit, or launch any Task Monitor task, or create a new Task Monitor task.
	Agent File Monitors	Lists all <a href="#">Agent File Monitor tasks</a> . From this list, you can view, edit, or launch any Agent File Monitor task, or create a new Agent File Monitor task.
	Remote File Monitors	Lists all <a href="#">Remote File Monitor tasks</a> . From this list, you can view, edit, or launch any Remote File Monitor task, or create a new Remote File Monitor task.
	System Monitors	Lists all <a href="#">System Monitor tasks</a> . From this list, you can view, edit, or launch any System Monitor task, or create a new System Monitor task.
	Variable Monitors	Lists all <a href="#">Variable Monitor tasks</a> . From this list, you can view, edit, or launch any Variable Monitor task, or create a new Variable Monitor task.
	Email Monitors	Lists all <a href="#">Email Monitor tasks</a> . From this list, you can view, edit, or launch any Email Monitor task, or create a new Email Monitor task.
	Universal Monitors	Lists all <a href="#">Universal Monitor tasks</a> . From this list, you can view, edit, or launch any Universal Monitor task, or create a new Universal Monitor task.
<b>Calendars</b>		List of all Calendars and Custom Days.
	Calendars	Lists all <a href="#">Calendars Overview</a> . From this list, you can view or edit any Calendar, create a new Calendar, and assign <a href="#">Custom Days</a> to any Calendar.
	Custom Days	Lists all global <a href="#">Custom Days</a> . From this list, you can view or edit any Custom Day, create a new Custom Day, and assign any Custom Day to any <a href="#">Calendar</a> .  Note  <b>Custom Days</b> displays in the Automation Center navigation pane only if the <a href="#">Custom Day Global Permitted</a> Universal Controller system property is set to <b>true</b> .
<b>Forecasts</b>		List of all Forecasts and Forecast Calendars.
	Forecasts	Lists all <a href="#">Forecasts</a> .
	Forecast Calendar	Displays a <a href="#">Forecast Calendar</a> for enabled Time, Temporary, and Cron Triggers.
<b>Other</b>		List of task- and trigger-related information.
	Credentials	Lists all <a href="#">Credentials</a> . From this list, you can view or edit any Credential, or create a new Credential.
	Email Templates	Lists all Email Templates, which allow you to construct commonly-used information that can be copied to create <a href="#">Email tasks</a> .

	Scripts	Lists all <a href="#">Scripts</a> , which have been stored in the Controller database for execution by Windows, Linux/Unix, and SAP tasks. From this list, you can create and edit Script records containing a script, and specify which tasks can use the script.
	Variables	List all <a href="#">user-defined Global variables</a> . From this list, you can view or edit any Global variable, or create a new Global variable.
	Virtual Resources	Lists all <a href="#">virtual resources</a> defined in your system, which allow you to set up "throttling" schemes that will manage the number of specific tasks that can run at one time. From this list, you can view, edit, and create a virtual resources, as well as assign tasks to a virtual resource.
<b>Reports</b>		
	Reports	Lists all <a href="#">Report Details</a> . From this list, you can view or edit any Report, or create a new Report.
	Widgets	Lists all <a href="#">Widgets</a> . From this list, you can view or edit any Widget, or create a new Widget.
	Colors	Lists all <a href="#">Colors</a> . From this list, you can view and edit the color assigned by default to any task instance status.
<b>Lifecycle Management</b>		
	Bundles	Lists all <a href="#">Bundles</a> , which are groups of user-selected records that can be promoted from one Controller server to another. Available if the user has the <a href="#">ops_bundle_admin</a> or <a href="#">ops_promotion_admin</a> role, or at least one <a href="#">Bundle</a> Read permission assigned.
	Promotion Targets	Lists all <a href="#">Promotion Targets</a> , which are the cluster nodes to which you can promote a Bundle. Available if the user has the <a href="#">ops_promotion_admin</a> or <a href="#">ops_bundle_admin</a> role, or at least one <a href="#">Promotion Target</a> Read permission assigned.
	Promotion History	Lists a <a href="#">history</a> of all promoted Bundles. Available if the user has the <a href="#">ops_promotion_admin</a> or <a href="#">ops_bundle_admin</a> role.
	Promotion Schedules	Lists all <a href="#">scheduled</a> Bundle promotions. Available if the user has the <a href="#">ops_bundle_admin</a> or <a href="#">ops_promotion_admin</a> role, or at least one <a href="#">Bundle</a> Read permission assigned.
<b>Agents</b>		Lists of Agent and Agent Clusters for each Agent type.
	All Agents	Lists all <a href="#">Agents Overview</a> . From this list, you can view or edit any Agent resource record. You also can suspend/resume any Agent.
	Linux/Unix Agents	Lists all <a href="#">Linux/Unix Agents</a> . From this list, you can view or edit any Linux/Unix Agent resource record, as well as suspend/resume any Linux/Unix Agent.
	Linux/Unix Agent Clusters	Lists all Linux/Unix <a href="#">agent clusters</a> . From this list, you can view or edit any Linux/Unix agent cluster record, as well as suspend/resume any Linux/Unix agent cluster.
	Windows Agents	Lists all <a href="#">Windows Agents</a> . From this list, you can view or edit any Windows Agent resource record, as well as suspend/resume any Windows Agent.
	Windows Agent Clusters	Lists all Windows <a href="#">agent clusters</a> . From this list, you can view or edit any Windows agent cluster record, as well as suspend/resume any Windows agent cluster.
	z/OS Agents	Lists all <a href="#">z/OS Agents</a> . From this list, you can view or edit any z/OS Agent resource record, as well as suspend/resume any z/OS Agent.
<b>Connections</b>		Lists of all Connection types.

	Email Connections	Lists all <a href="#">Email Connections</a> , which provide all of the email server information necessary for the Controller to send emails. From this list, you can view, edit, and create Email Connections, as well as specify the <a href="#">Email tasks</a> that will use the server specified in the Email Connection.
	Database Connections	Lists all <a href="#">Database Connections</a> , which provide all the database server information necessary for the Controller to execute a <a href="#">SQL task</a> or <a href="#">Stored Procedure task</a> . From this list, you can view, edit, and create Database Connections, as well as specify the SQL and Stored Procedure tasks that can use this Database Connection.
	SAP Connections	Lists all <a href="#">SAP Connections</a> that have been defined in your system, which provide the SAP server information necessary for the Controller to execute an <a href="#">SAP task</a> on an SAP system.
	PeopleSoft Connections	Lists all <a href="#">PeopleSoft Connections</a> that have been defined in your system, which provide the PeopleSoft server information necessary for the Controller to execute a <a href="#">PeopleSoft task</a> on a PeopleSoft system.
<b>System</b>		Lists of Universal Controller system-related records.
	Applications	Lists all <a href="#">Applications</a> that have been defined in your system and which can be monitored and controlled.
	Cluster Nodes	Lists all <a href="#">cluster nodes</a> in your system. From this list, you can view Details of any cluster node and create <a href="#">Cluster Node Notifications</a> .
	OMS Servers	Lists all <a href="#">Universal Message Service (OMS) servers</a> . From this list, you can create a new OMS Server record and view Details of any existing OMS Server record. From OMS Server Details, you can edit the record and display the list of Agents using this OMS Server.
	SNMP Managers	Lists all <a href="#">SNMP Managers</a> , to which <a href="#">SNMP notifications</a> are sent.
<b>Administration</b>		
	Audits	Lists all <a href="#">Audits</a> that have been created for user interaction with the Controller.
	Business Services	Lists all <a href="#">Business Services</a> . From this list, you can view or edit any Business Service, or create a new Business Service.
	Data Backup/Purge	Lists all <a href="#">Data Backup/Purge</a> records in your system, which specify the automatic back-up and purge of Controller activity data. From this list, you can view, edit, and create Data Backup / Purge records.
	Filters	Lists all record <a href="#">Filters</a> for which the logged in user has permission. List filters are created using the filtering fields on the record list itself. Note that this feature is used only for record lists, not the Activity Monitor. This feature allows you to update or delete existing filters.
	Groups	Lists all <a href="#">user groups</a> that have been defined in your system.
	LDAP Settings	Allows you to configure Lightweight Directory Access Protocol (LDAP) settings. See <a href="#">LDAP Settings</a> .
	Password Settings	Allows you to configure password specifications. See <a href="#">Password Settings</a> .
	Properties	Lists all <a href="#">Universal Controller system properties</a> .
	Server Operations	Lists all <a href="#">Server Operations</a> , which you can run to help maintain and administer your Controller installation.
	Single Sign-On Settings	Allows you to configure SAML Single Sign-On settings. See <a href="#">Single Sign-On Settings</a> .

	Universal Templates	Lists all <a href="#">Universal Templates</a> , from which <a href="#">Universal Task</a> types are created. Available if the user has the <a href="#">ops_universal_template_view</a> , <a href="#">ops_universal_template_admin</a> , <a href="#">ops_admin</a> , or <a href="#">ops_service</a> role.
	Universal Event Templates	Lists all global <a href="#">Universal Event Templates</a> , For any global Universal Event, the Universal Template administrator must declare the Universal Event here to allow the event to be monitored by an Universal Monitor.
	Users	Lists all <a href="#">users</a> that have been defined in your system.
<b>Support</b>		
	Support Portal	Links to the <a href="#">Support</a> page on the Stonebranch website.
	Video Classroom	Links to the Universal Controller <a href="#">Video Classroom</a> , which provides demos of Controller features.

## Available Services Refresh

You can refresh the Navigation tree for any navigation pane at any time in order to refresh the displayed items in that tree. Refreshing the Navigation tree reloads the tree as if you were logging out and logging in.

If you change the [navigation visibility](#) to one or more areas of a navigation pane for a user group, refreshing the navigation tree for that navigation pane will show those changes for any user in that group.

Additionally, for the Automation Center navigation pane, any new Universal Task types that were created since user login, as well as any modifications made to the System Default Navigation pane by an Administrator, will be displayed on the Automation Center navigation pane when the navigation tree is refreshed.

To refresh a navigation tree, right-click anywhere in the navigation pane and, in the [Action menu](#) that displays, click Refresh Navigation Tree. Any changes to the navigation pane will display.

# Records

- [Introduction](#)
  - [Naming Tips](#)
- [Creating a Record](#)
- [Opening a Record](#)
- [Record Details](#)
- [Record Details Fields](#)
  - [Selecting Field Values](#)
  - [Details Icon](#)
  - [Field Hints](#)
- [Record Details Tabs](#)
  - [Color-Coding of Tabs](#)
  - [Re-Ordering of Tabs](#)
- [Complete Database Details](#)
- [Record Details Metadata](#)
  - [Metadata Field Descriptions](#)
- [Performing Actions on a Record](#)
  - [Updating a Record](#)
  - [Copying a Record](#)
  - [Printing a Record](#)
  - [Deleting a Record](#)
- [Hiding Record Details \(or a List of Records\)](#)
- [Record Versioning](#)
  - [Viewing Old Versions of Records](#)
  - [Restoring Old Versions of Records](#)
  - [Purging Old Versions of Records](#)
  - [Enabling/Disabling Versioning](#)
- [Exporting and Importing Records](#)
  - [Bulk Export/Import](#)
  - [List Export/Import](#)
- [Updating Multiple Records](#)
  - [Updating Manually Selected Records](#)
  - [Updating Records That Match the Current Filter](#)
  - [Update / Update Filtered Dialog Columns](#)
  - [Update / Update Filtered Dialog Variable Fields for Tasks](#)
- [Uploading Records](#)
- [Downloading Records](#)
  - [Download Manually Selected Records from a List](#)
  - [Download Records That Match the Current Filter](#)
  - [Download a Single Record from its Record Details](#)

## Introduction

A record is an entry in the Universal Controller database. Most records are created by the user via the user interface, but others (such as [Agent](#) records) are created by the Controller.

All system-supplied and/or user-supplied information about a record is contained in the record Details.

## Naming Tips

Many functions within Controller are executed against one or more records.

For example, you can assign a user permission to:

- Change only certain tasks.
- Issue commands against a group of task instances.
- Filter a trigger list to display only certain triggers.

Two methods are available to help you organize your records to facilitate the use of these functions.

<b>Method 1</b>	<p>Develop a naming scheme for records.</p> <p>For example, when naming tasks, you could prepend with <b>SF</b> all tasks related to San Francisco operations, or you could prepend with <b>REPT</b> all report-related tasks. With such a naming scheme, you can sort and filter lists by selecting records, for example, that begin with "REPT." You can assign permissions and execute commands against records using the same method.</p>
<b>Method 2</b>	<p>Use <a href="#">Business Services</a>, which simply is a method of grouping records. Whenever you create a record, you can assign it to a Business Service.</p> <p>For example, you could have a Business Service called "SF" and a Business Service called "REPT." Using this method, you could then filter or sort a list based on the Business Service. As another example, you could assign permissions to a user, giving the user update permission to all records in the "REPT" Business Service. Business Services allow you to create groups based on business functions and organize all your Controller records according to user-defined categories.</p>

## Creating a Record

<b>Step 1</b>	Select a record type from the appropriate navigation pane of the <a href="#">Services</a> . The records list for that record type displays.
<b>Step 2</b>	<p>Either:</p> <ul style="list-style-type: none"> <li>• Enter / select information for a new record in the empty <a href="#">Details</a> that displays below the list.</li> <li>• Click the <b>New</b> button that displays above the list to display an empty Details pop-up, and enter / select information for a new record.</li> </ul>
<b>Step 3</b>	Click the <b>Save</b> , <b>Save &amp; New</b> , or <b>Save &amp; View</b> button to save the record.


Note

 You also can create a record by [copying](#) and renaming an existing record.

## Opening a Record

Opening a record refers to the displaying of a record [Details](#).

Note

 Some [actions](#) (such as [delete](#)) can be performed on a record without opening the record.

<b>Step 1</b>	Select a record type from the appropriate navigation pane of the <a href="#">Services</a> . The records list for that record type displays.
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**Step 2**

Either:

- Click a record in the list to display its record Details below the list.
- 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](#)).

## Record Details

When you select a record type from the [Services](#), a list of records for that type displays. Below the list, an empty record Details for a new record of that type displays.

For example:

The screenshot displays the 'Linux/Unix Tasks' section of the Universal Controller. At the top, there is a navigation bar with 'Dashboards' and 'Linux/Unix Tasks'. Below this is a table listing five tasks, all named 'stonebranch-linuxunixtask-01' through '05'. Each task is a 'Command' type, updated by 'ops.admin' at various times in 2019 and 2020. Below the table is a 'Linux/Unix Task Details' section with tabs for 'Variables', 'Actions', 'Virtual Resources', 'Mutually Exclusive', 'Instances', 'Triggers', 'Notes', and 'Versions'. The 'General' tab is active, showing fields for Name, Description, Member of Business Services, Resolve Name Immediately, Hold on Start, Virtual Resource Priority (set to 10), Time Zone Preference (set to -- System Default --), and Hold Resources on Failure. The 'Agent Details' section includes fields for Cluster, Agent, Credentials, Run as sudo, Agent Variable, and Credentials Variable. The 'Linux/Unix Details' section includes fields for Command or Script (set to Command), Command, Parameters, and Runtime Directory.

Name	Description	Command or Script	Updated By	Updated
stonebranch-linuxunixtask-01		Command	ops.admin	2019-08-05 14:37:25 -0400
stonebranch-linuxunixtask-02		Command	ops.admin	2020-01-07 10:17:17 -0500
stonebranch-linuxunixtask-03		Command	ops.admin	2020-01-07 10:17:40 -0500
stonebranch-linuxunixtask-04		Command	ops.admin	2020-01-07 10:17:54 -0500
stonebranch-linuxunixtask-05		Command	ops.admin	2020-01-07 10:18:11 -0500

To see Details of an existing record, [open](#) the record.

For example:

Linux/Unix Task Details: stonebranch-linuxunixtask-01

Linux/Unix Task

 Variables
  Actions
  Virtual Resources
  Mutually Exclusive
  Instances
  Triggers
  Notes
  Versions

**General**

Name:  Version:

Description:

Member of Business Services:

Resolve Name Immediately:  Time Zone Preference:

Hold on Start:

Virtual Resource Priority:  Hold Resources on Failure:

**Agent Details**

Cluster:

Agent:  Agent Variable:

Credentials:  Credentials Variable:

Run as sudo:

**Linux/Unix Details**

Command or Script:

Command:

Parameters:

Runtime Directory:

Environment Variables:

Name	Value
No items to show.	

**Result Processing Details**

Exit Code Processing:

Exit Codes:

Automatic Output Retrieval:

**Retry Options**

Retry Exit Codes:

Maximum Retries:  Retry Indefinitely:

Retry Interval (Seconds):  Suppress Intermediate Failures:

**Wait/Delay Options**

Wait To Start: -- None --  
 Delay On Start: -- None --  
 Workflow Only: -- System Default --

**Time Options**  
 Late Start:       Late Start Type: Time  
 Late Start Time: Hour: 00 Min: 00      Late Start Day Constraint: -- None --  
 Late Finish:   
 Early Finish:   
 User Estimated Duration: Day: Hour: Min: Sec:

**Critical Path Options**  
 CP Duration:      CP Duration Unit: Minutes

**Workflow Execution Options**  
 Execution Restriction: -- None --

## Record Details Fields

The following formatting applies to fields for all record types:

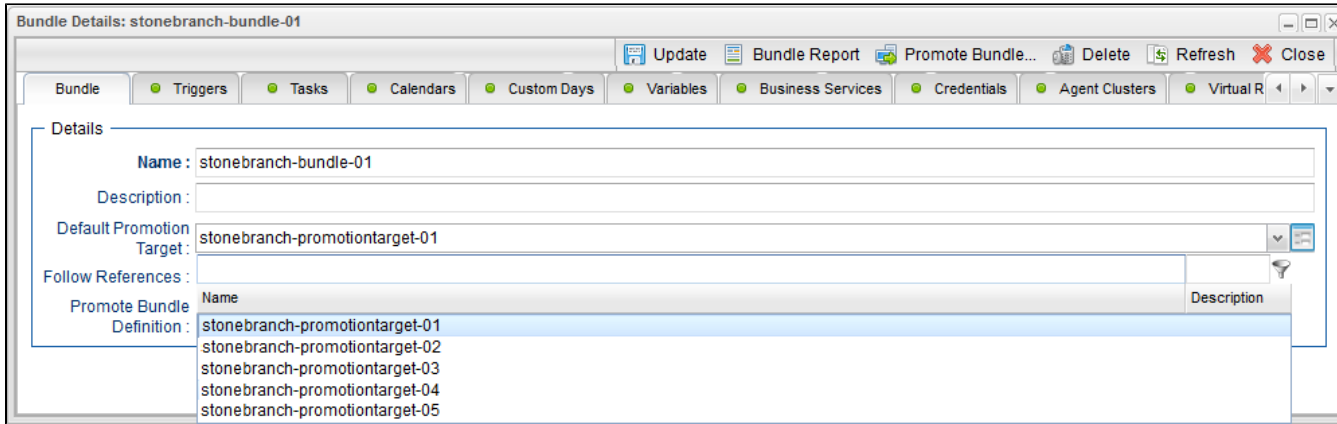
- Fields with names followed by an asterisk ( \* ) are required.
- Gray fields are read-only.
- White fields are editable. They may accept any value or only values selected from a drop-down list.
- Some fields provide a drop-down list of values, which are the only selections available for that field.
- Some fields contain a default value.
- Some fields provide [hints](#) that describe value to be entered/selected for that field.

## Selecting Field Values

Many fields provide a drop-down list of values for that field. These fields have a down arrow next to it, which you must click to display the list of values.

Additionally, drop-down list fields whose available values are records (as identified by a [Details Icon](#)), provide a filter for only listing records that contain the sequence characters that you enter in any of the provided record fields.

In the following example, the drop-down list for **Default Promotion Target** lets you filter the list of Promotion Target records by **Name** or **Description** field:



## Details Icon

A Details icon displays next to a drop-down list field if the values available for that field are records.

- If the drop-down list field contains a value (a record selected from the list), you can click the Details icon to view (and modify) that record.
- If the drop-down list is empty, you can click the Details icon to create a record of that record type.

For example, every Trigger record contains a Calendar field whose value is the name of a Calendar selected from the drop-down list:

Update Enable Trigger Now... Copy Delete Refresh Close

Temporary Trigger Variables Versions

**General**

**Name:**  **Version:**

**Description:**

**Member of Business Services:**

**Calendar:**   **Time Zone:**

**Task(s):**

stonebranch-windowstask-01

**Purge By Retention Duration:**

**Status**

**Forecast:**  **Status:**

**Task Launch Skip Condition:**  **Disabled By:**

**Simulate:**  **Disabled Time:**

**Temporary Details**

**Date:**

**Time:**

If you click the Details icon next to the Calendar field, the Details for that Calendar displays.

The screenshot displays two overlapping windows from the Universal Controller interface. The top window, titled 'Temporary Trigger Details: stonebranch-temporarytrigger-01', has tabs for 'Temporary Trigger', 'Variables', and 'Versions'. The 'Temporary Trigger' tab is active, showing a 'General' section with fields for 'Name' (stonebranch-temporarytrigger-01), 'Version' (1), 'Description', and 'Member of Business Services'. The bottom window, titled 'Calendar Details: System Default', has tabs for 'Calendar', 'Local Custom Days', 'Custom Days', 'Triggers', and 'Versions'. The 'Triggers' tab is active, showing a 'Details' section with fields for 'Name' (System Default), 'Version' (2), 'Description' (Default System Calendar), and 'Member of Business Services'. Below these fields are checkboxes for 'Business Days' (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday), with Monday through Friday checked. At the bottom of the interface is a 'Temporary Details' section with 'Date' (2018, May, 1) and 'Time' (00:00) fields.

## Field Hints

Fields hints describe the value to be entered/selected for that field.

To display a field hint, hover your cursor over the field value.

For example:

The screenshot shows a web-based configuration window titled "Temporary Trigger Details: stonebranch-temporarytrigger-01". At the top, there are navigation buttons: Update, Enable, Trigger Now..., Copy, Delete, Refresh, and Close. Below these are three tabs: "Temporary Trigger" (selected), "Variables", and "Versions".

The "General" section contains the following fields:

- Name:** stonebranch-temporarytrigger-01
- Version:** 1
- Description:** (empty text box)
- Member of Business Services:** (dropdown menu)
- Calendar:** System Default (with a calendar icon and a tooltip that says "The calendar this trigger uses.")
- Time Zone:** Server (US/Eastern)
- Task(s):** (empty list area with a lock icon)
- Purge By Retention Duration:** (checkbox, currently unchecked)

The "Status" section contains the following fields:

- Forecast:** (checkbox, unchecked)
- Skip Count:** 0
- Task Launch Skip Condition:** -- None --
- Simulate:** -- System Default --
- Status:** Disabled
- Disabled By:** (empty text box)

The "Temporary Details" section contains the following fields:

- Date:** 2018 May 1
- Time:** Hour: 00, Min: 00

## Record Details Tabs

The record Details for every record contains one or more tabs, including the default **<record type>** tab that provides detailed information about the record.

For example, Details for all **tasks** (except Workflows) provide eight tabs in addition to the **<record type>** tab. The currently selected tab displays in white. All other tabs display in gray.

Linux/Unix Task Details: stonebranch-linuxunixtask-01

Update Launch Task View Parents Copy Delete Refresh Close

Linux/Unix Task Variables Actions Virtual Resources Mutually Exclusive Instances Triggers Notes Versions

**General**

Name: stonebranch-linuxunixtask-01 Version: 44

Description:

Member of Business Services:

Resolve Name Immediately:  Time Zone Preference: -- System Default --

Hold on Start:

Virtual Resource Priority: 10 Hold Resources on Failure:

**Agent Details**

Cluster:

Agent: qa-cntrl-mysql.stone.branch - qa-cntrl-mysql Agent Variable:

Credentials: Credentials Variable:

Run as sudo:

**Linux/Unix Details**

Command or Script: Command

Command: dir

Parameters:

Runtime Directory:

Environment Variables:

Name	Value
No items to show.	

**Result Processing Details**

Exit Code Processing: Success Exitcode Range

Exit Codes: 0

Automatic Output Retrieval: -- None --

**Retry Options**

Retry Exit Codes:

Maximum Retries: 0 Retry Indefinitely:

Retry Interval (Seconds): 60 Suppress Intermediate Failures:

Wait/Delav Options

Each tab displays a list of records that have been user-defined to be associated with the record. For example, the **Triggers** tab for a task would list any [trigger](#) records that specify this task in its trigger Details.

As appropriate for the type of record listed for a tab, the following also is provided:

- **Details** icon that allows you to view and edit Details for that record.
- **New** button that allows you to create a new record of that type and automatically associate it with the record whose Details are displayed in the **<record type>** tab.

When you click a tab to display a list of records associated with the current record, you can:

- View details about each record on the list.
- Create a new record of that type.

## Color-Coding of Tabs

Tabs are color-coded:

- Current tab displays in white.
- Tabs that contain records display a green icon.
- Tabs that do not contain records display a gray icon.

For example, this Linux/Unix Task Details shows that there are one or more records under the Virtual Resources and Versions tabs:

Linux/Unix Task Details: stonebranch-linuxunixtask-01

Linux/Unix Task

 Variables
  Actions
  Virtual Resources
  Mutually Exclusive
  Instances
  Triggers
  Notes
  Versions

**General**

Name :  Version :

Description :

Member of Business Services :

Resolve Name Immediately :  Time Zone Preference :

Hold on Start :

Virtual Resource Priority :  Hold Resources on Failure :

**Agent Details**

Cluster :

Agent :  Agent Variable :

Credentials :  Credentials Variable :

Run as sudo :

**Linux/Unix Details**

Command or Script :

Command :

Parameters :

Runtime Directory :

Environment Variables :

Name	Value
No items to show.	

**Result Processing Details**

Exit Code Processing :

Exit Codes :

Automatic Output Retrieval :

**Retry Options**

Retry Exit Codes :

Maximum Retries :  Retry Indefinitely :

Retry Interval (Seconds) :  Suppress Intermediate Failures :

**Wait/Delav Options**

The screenshot displays a configuration window with several sections:

- Top Section:** Three dropdown menus: "Wait To Start" (set to "-- None --"), "Delay On Start" (set to "-- None --"), and "Workflow Only" (set to "-- System Default --").
- Time Options Section:**
  - Three checkboxes: "Late Start", "Late Finish", and "Early Finish", all currently unchecked.
  - "User Estimated Duration": A set of four spinners for "Day", "Hour", "Min", and "Sec".
- Critical Path Options Section:**
  - "CP Duration": An empty text input field.
  - "CP Duration Unit": A dropdown menu set to "Minutes".
- Workflow Execution Options Section:**
  - "Execution Restriction": A dropdown menu set to "-- None --".

## Re-Ordering of Tabs

You can change the order of one or more tabs for a record type by clicking the tabs in any record of that type and dragging them left or right to a new position.

The tabs for all records of that record type will display in that order.

To restore the original order of the tabs, right-click any tab and click **Restore Tab Order**.

Any tab re-ordering that you apply is associated with your user own account. The re-ordering is automatically persisted in the Universal Controller database and will apply any time that you log into the user interface.

## Complete Database Details

The information displayed in the Details for any record is only a portion of the complete details for that record contained in the Controller database.

To see the complete details, right-click anywhere in the record Details to display an [Action menu](#) and then click **Details > Show Details**.

The database Details for all records contains the following fields:

- UUID
- Updated By
- Updated
- Created By
- Created

The database Details for some record types (for example, any Task Instance record, as shown below) may show additional fields, such as Status History.

After Date:	
After Time:	
Agent:	d8bff6ee8713499680c9008cd0b31657
Agent:	d8bff6ee8713499680c9008cd0b31657
Agent Acquired:	
Agent Acquired Name:	
Agent Cluster:	42fcf7d1d2bd4d2cb90c9c134aee1d4c
Agent Cluster Acquired:	
Agent Cluster Acquired Name:	
Agent Cluster Name:	Cluster Man
Agent Cluster Unresolved:	
Agent Cluster Variable:	false
Agent Name:	qa-stone.branch - qa-mysql
Agent Unresolved:	
Agent Variable:	false
All Dependencies Cleared:	false
Attempt:	1
Automatic Output File:	
Automatic Output Retrieval:	-- None --
Average Estimated End Time:	2018-07-23 19:49:57 -0400
Before Date:	
Before Time:	
Calendar:	77171434c0a801c9016d5b2b5d17ddee
Calendar Name:	System Default
Can Copy:	false
Can Delete:	true
Can Update:	true
Class:	ops_exec_unix
Command:	ls -la
Command or Script:	Command
CP Duration:	
CP Duration (Resolved):	



<b>CP Duration Unit:</b>	Mnutes
<b>CPU Time:</b>	118
<b>Created:</b>	2018-07-23 19:49:56 -0400
<b>Created By:</b>	ops.admin
<b>Credentials:</b>	
<b>Credentials Name:</b>	
<b>Credentials Unresolved:</b>	
<b>Credentials Variable:</b>	false
<b>Critical:</b>	false
<b>Current Retry Count:</b>	0
<b>Date List:</b>	
<b>Delay Duration:</b>	00:00:00:00
<b>Delay Duration In Seconds:</b>	
<b>Delay On Start:</b>	-- None --
<b>Duration:</b>	0 Seconds
<b>Duration In Seconds:</b>	0
<b>Early Finish:</b>	false
<b>Early Finish Day Constraint:</b>	-- None --
<b>Early Finish Duration:</b>	00:00:00:00
<b>Early Finish Nth Amount:</b>	5
<b>Early Finish Time:</b>	00:00
<b>Early Finish Type:</b>	Time
<b>End Time:</b>	2018-07-23 19:49:57 -0400
<b>Environment Variables:</b>	
<b>Evaluation Time:</b>	
<b>Exclude Backup:</b>	false
<b>Exclusive State:</b>	Initial
<b>Execution Restriction:</b>	-- None --
<b>Execution User:</b>	ops.admin
<b>Exit Code:</b>	0
<b>Exit Code Processing:</b>	Success Exitcode Range
<b>Exit Codes:</b>	0
<b>Finished Early:</b>	false

<b>Finished Late:</b>	false
<b>Forced Finished:</b>	false
<b>Hold on Start:</b>	false
<b>Hold Reason:</b>	
<b>Hold Resources on Failure:</b>	false
<b>Instance Name:</b>	Test_LS
<b>Interact with Desktop:</b>	false
<b>Invoked By:</b>	Manually Launched
<b>IO Other:</b>	0
<b>IO Reads:</b>	0
<b>IO Writes:</b>	0
<b>Is Version:</b>	false
<b>Late Finish:</b>	false
<b>Late Finish Day Constraint:</b>	-- None --
<b>Late Finish Duration:</b>	00:00:00:00
<b>Late Finish Nth Amount:</b>	5
<b>Late Finish Time:</b>	00:00
<b>Late Finish Type:</b>	Time
<b>Late Start:</b>	false
<b>Late Start Day Constraint:</b>	-- None --
<b>Late Start Duration:</b>	00:00:00:00
<b>Late Start Nth Amount:</b>	5
<b>Late Start Time:</b>	00:00
<b>Late Start Type:</b>	Time
<b>Launch Time:</b>	2018-07-23 19:49:56 -0400
<b>Longest Estimated End Time:</b>	2018-07-23 19:49:57 -0400
<b>Maximum Retries:</b>	0
<b>Member of Business Services:</b>	
<b>Member of Business Services:</b>	
<b>Memory Peak:</b>	5564
<b>Memory Used:</b>	5564
<b>Next Retry Time:</b>	
<b>Number of Lines:</b>	100

number of lines:	100
Operational Memo:	
Output File:	
Output Type:	Standard Output
Parameters:	
Predecessors Satisfied Time:	
Process ID:	27320
Progress:	
Projected End Time:	
Queued Time:	2018-07-23 19:49:57 -0400
Reference Id:	5
Resolve Name Immediately:	false
Resources Consumed:	false
Resources State:	Initial
Restriction Period:	-- None --
Retention Time:	
Retry Exit Codes:	
Retry Indefinitely:	false
Retry Interval (Seconds):	60
Run as sudo:	false
Run Called:	true
Run Criteria Run Time:	false
Run Criteria Trigger Time:	false
Runtime Directory:	
Scan Output For:	
Scan Text:	
Script:	
Script Name:	
Security Name:	Test_LS
Shortest Estimated End Time:	2018-07-23 19:49:57 -0400
Start Line:	1
Start Time:	2018-07-23 19:49:57 -0400
Started Late:	false

<b>State Changed Time:</b>	2018-07-23 19:49:58 -0400
<b>Status:</b>	Success
<b>Status Description:</b>	
<b>Status History:</b>	2018-07-23 19:49:56 -0400: Defined 2018-07-23 19:49:57 -0400: Queued 2018-07-23 19:49:57 -0400: Started 2018-07-23 19:49:57 -0400: Running 2018-07-23 19:49:58 -0400: Success
<b>Suppress Intermediate Failures:</b>	false
<b>Tab Names Containing Data:</b>	
<b>Table Name:</b>	ops_exec_unix
<b>Task:</b>	18eea5f2325a400284f4afbbcae03041
<b>Task Description:</b>	
<b>Task Name:</b>	Test_LS
<b>Task Priority:</b>	MEDIUM
<b>Time Wait State:</b>	Initial
<b>Time Zone:</b>	Server
<b>Time Zone Preference:</b>	-- System Default --
<b>Trigger:</b>	
<b>Trigger Name:</b>	
<b>Trigger Time:</b>	
<b>Type:</b>	Linux/Unix
<b>Universal Template:</b>	
<b>Universal Template Name:</b>	
<b>Updated:</b>	2018-07-23 19:49:58 -0400
<b>Updated By:</b>	ops.system
<b>User Defined Field 1:</b>	
<b>User Defined Field 2:</b>	
<b>User Estimated End Time:</b>	
<b>UUID:</b>	1532099993345407322OUI58BZG0GNN6
<b>Virtual Resource Priority:</b>	10
<b>Wait Day Constraint:</b>	-- None --
<b>Wait Duration:</b>	00:00:00:00
<b>Wait Duration In Seconds:</b>	

Wait Time (HH:MM):	00:00
Wait To Start:	-- None --
Wait Until Time:	
Waited for Exclusive:	false
Waited for Resources:	false
Workflow:	
Workflow Definition:	
Workflow Definition Name:	
Workflow Name:	
Workflow Only:	Yes
Workflow Start Time:	

 Print
 Refresh

## Record Details Metadata

The [Action menu](#) for every record [Details](#) contains a Details sub-menu. If you click **Show Metadata** on this sub-menu, a Metadata section displays at the bottom of the Details. (If Metadata is being displayed, the Details sub-menu contains a **Hide Metadata** entry.)

Note



You can choose to display Metadata automatically via the [Show Metadata](#) Universal Controller system property, and you can override the Show Metadata property setting via the [Show Metadata](#) user preference.

The Metadata for all records contains the following fields:

- UUID
- Updated By
- Updated
- Created By
- Created

The Metadata for any Task Instance record, as shown below, also contains a Status History field.

Metadata

UUID : 1489504223156353272R56JICQZUU0R6

Updated By : ops.admin      Created By : ops.admin

Updated : 2017-03-14 16:06:31 -0400      Created : 2017-03-14 16:03:47 -0400

Date	Status
2017-03-14 16:03:47 -0400	Defined
2017-03-14 16:03:47 -0400	Waiting
2017-03-14 16:06:21 -0400	Running
2017-03-14 16:06:31 -0400	Success

Status History : 2017-03-14 16:03:47 -0400

## Metadata Field Descriptions

The following table describes the fields that display in the Metadata section of record Details.

Field Name	Description
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.
Status History	Task instance only; History of all statuses that the task instance has gone through.

## Performing Actions on a Record

You can perform many actions on a record by right-clicking anywhere in the the record Details to display an [Action menu](#) of all actions available for that record.

You also can perform many actions on a record (or multiple records) from a records list; that is, without having to open the record (see [Performing Actions on a Record from a List](#)).

### Note



The actions available for a record when selecting an Action menu from the record Details may not be the same as the actions available when you select an Action menu from a list.

The following actions can be performed for all user-defined records:

- [Updating](#)
- [Copying](#)
- [Printing](#)
- [Deleting](#)

## Updating a Record

<b>Step 1</b>	<a href="#">Open</a> the record that you want to update.
<b>Step 2</b>	Make any desired updates to the record and click the <b>Update</b> button.

Note



If you change the name of a [task](#) that is part of a [Workflow](#), the Controller automatically changes the name of that task within the Workflow itself.

## Copying a Record

<b>Step 1</b>	<a href="#">Open</a> the record that you want to copy.
<b>Step 2</b>	In the <b>&lt;record&gt; Name</b> field, enter a new name for the record.
<b>Step 3</b>	Right-click in the Details and then click <b>Insert</b> on the <a href="#">Action menu</a> . The displayed record becomes a copy of the record you selected and is added to the list.

Note



To copy a [Report](#) or [Filter](#), you must use the **Save As...** button in the record Details, which lets you save the record under a different Title (for Reports) or Name (for Filters) and/or as being visible to different users.

Caution



Do not use **Insert** to copy the following types of records unless you do not want to copy any records associated with them, such as Actions, Notes, and Variables. Using **Insert** does not copy any records associated with these types of records:

- Tasks
- Triggers
- Calendars
- Scripts
- Connections
- SNMP Managers

To copy any of these record types and all of their associated records, use the methods described in:

- [Copying Tasks](#)
- [Copying Triggers](#)
- [Copying Calendars](#)
- [Copying Scripts](#)
- [Copying Email Templates](#)
- [Copying Database Connections](#)
- [Copying Email Connections](#)
- [Copying PeopleSoft Connections](#)
- [Copying SAP Connections](#)
- [Copying SNMP Managers](#)

Also, do not use the **Update** button to copy a record; the **Update** button overwrites the existing record.

## Printing a Record

To print a hard copy of the Details of any record:

<b>Step 1</b>	<p>Either:</p> <ul style="list-style-type: none"> <li>• Right-click the record in the records list and click <b>Details &gt; Print</b> in the <a href="#">Action menu</a>.</li> <li>• <a href="#">Open</a> the record, right-click in the record Details, and click <b>Details &gt; Print</b> in the <a href="#">Action menu</a>.</li> </ul>
<b>Step 2</b>	Select a printer and click <b>OK</b> .

## Deleting a Record

Deleting a record removes it from the Controller database.

<b>Step 1</b>	<p>Either:</p> <ul style="list-style-type: none"> <li>• Right-click a record in the records list and click <b>Delete</b> in the <a href="#">Action menu</a>.</li> <li>• <a href="#">Open</a> the record and either: <ul style="list-style-type: none"> <li>• Click the <b>Delete</b> button.</li> <li>• Right-click anywhere in the record Details and click <b>Delete</b> in the <a href="#">Action menu</a>.</li> </ul> </li> </ul>
<b>Step 2</b>	On the Confirmation pop-up that displays, click <b>Yes</b> .

## Hiding Record Details (or a List of Records)

You can temporarily hide record Details (or the list of records displays above the Details).

If you hide the Details, more records in the list can display. If you hide a list, more Details can display on the page.

- To hide the record Details, click the down arrow ( **v** ) at the top of the Details.
- To hide a list of records, click the down arrow ( **v** ) at the top of the list.

The screenshot displays the 'Linux/Unix Tasks' section of the Universal Controller interface. At the top, there is a navigation bar with 'Dashboards' and 'Linux/Unix Tasks' tabs. Below this is a table listing five tasks, all named 'stonebranch-linuxunixtask-01' through '05'. The table columns are Name, Description, Command or Script, Updated By, and Updated. The 'Updated' column shows dates and times, such as '2019-08-05 14:37:25 -0400'.

Below the table is a 'Linux/Unix Task Details' section. It features a 'Save' button and a 'Save & New' button. The details are organized into several tabs: 'Linux/Unix Task', 'Variables', 'Actions', 'Virtual Resources', 'Mutually Exclusive', 'Instances', 'Triggers', 'Notes', and 'Versions'. The 'Linux/Unix Task' tab is active, showing a form with the following fields:

- General:** Name (text input), Description (text input), Member of Business Services (dropdown), Resolve Name Immediately (checkbox), Hold on Start (checkbox), Virtual Resource Priority (dropdown set to 10), Time Zone Preference (dropdown set to -- System Default --), and Hold Resources on Failure (checkbox).
- Agent Details:** Cluster (checkbox), Agent (dropdown), Agent Variable (checkbox), Credentials (dropdown), Credentials Variable (checkbox), and Run as sudo (checkbox).
- Linux/Unix Details:** Command or Script (dropdown set to Command), Command (text input), Parameters (text input), and Runtime Directory (text input).

To redisplay a hidden Details or list, click the up arrow ( ^ ) that replaced down arrow ( v ) when you hid the Details or list.

## Record Versioning

Universal Controller maintains historical copies of most user-created records in the database. These include tasks and their associated records (virtual resources, variables, actions, notes), calendars and their custom day associations, custom days, variables, credentials, virtual resources, scripts (and associated notes), email templates and connections, database connections, SNMP managers, SAP connections, PeopleSoft connections, agent clusters, applications, Business Services, and triggers (and associated variables).

These historical copies - old versions of the current records - are read-only.

When you update any of these records, the Controller creates an image of the old version and stores it in the record's **Versions** tab. It also updates the **Version** field in the current version of the record. For example, if you have updated a task three times, there will be three versions of that task stored in the Versions tab, and the current version will be identified as Version 4.

Although you can [purge](#) old versions of records, the **Versions** field in the current record always will show how many versions of the record have been created.

## Viewing Old Versions of Records

To view old versions:

---

<b>Step 1</b>	Open the record Details for which you want to view old versions. The <b>Version</b> field indicates how many versions of this record have been made.
---------------	--

Linux/Unix Task Details: stonebranch-linuxunixtask-01

Update Launch Task View Parents Copy Delete Refresh Close

Linux/Unix Task Variables Actions Virtual Resources Mutually Exclusive Instances Triggers Notes Versions

**General**

Name: stonebranch-linuxunixtask-01 Version: 44

Description:

Member of Business Services:

Resolve Name Immediately:  Time Zone Preference: -- System Default --

Hold on Start:

Virtual Resource Priority: 10 Hold Resources on Failure:

**Agent Details**

Cluster:

Agent: qa-ctrlr-mysql.stone.branch - qa-ctrlr-mysql Agent Variable:

Credentials: Credentials Variable:

Run as sudo:

**Linux/Unix Details**

Command or Script: Command

Command: dir

Parameters:

Runtime Directory:

Environment Variables:

Name	Value
No items to show.	

**Result Processing Details**

Exit Code Processing: Success Exitcode Range

Exit Codes: 0

Automatic Output Retrieval: -- None --

**Retry Options**

Retry Exit Codes:

Maximum Retries: 0 Retry Indefinitely:

Retry Interval (Seconds): 60 Suppress Intermediate Failures:

**Wait/Delay Options**

Wait To Start: -- None --

Delay On Start: -- None --

Workflow Only: -- System Default --

**Time Options**

Late Start:

Late Finish:

Early Finish:

User Estimated Duration: Day Hour Min Sec

**Critical Path Options**

CP Duration: CP Duration Unit: Minutes

**Workflow Execution Options**

Execution Restriction: -- None --

**Step 2** Click the **Versions** tab. A list of old versions that currently exist for this record displays.

Name	Version	Description	Created By	Created
stonebranch-linuxunixtask-01	15		ops.admin	2020-10-06 14:58:45 -0400
stonebranch-linuxunixtask-01	14		ops.admin	2020-01-07 10:56:56 -0500

The number of old versions that currently exist for this record is identified above the list.

Click the Refresh icon at any time to get the current list.

**Step 3** Click the Details icon next to the **Name** of the version, or double-click anywhere in the version row, to displays Details for that version.

Linux/Unix Task Details: stonebranch-linuxunixtask-01

Update Launch Task View Parents Copy Delete Refresh Close

Linux/Unix Task Variables Actions Virtual Resources Mutually Exclusive Instances Triggers Notes Versions

**General**

Name: stonebranch-linuxunixtask-01 Version: 44

Description:

Member of Business Services:

Resolve Name Immediately:  Time Zone Preference: -- System Default --

Hold on Start:

Virtual Resource Priority: 10 Hold Resources on Failure:

**Agent Details**

Cluster:

Agent: qa-ctrlr-mysql.stone.branch - qa-ctrlr-mysql Agent Variable:

Credentials: Credentials Variable:

Run as sudo:

**Linux/Unix Details**

Command or Script: Command

Command: dir

Parameters:

Runtime Directory:

Environment Variables:

Name	Value
No items to show.	

**Result Processing Details**

Exit Code Processing: Success Exitcode Range

Exit Codes: 0

Automatic Output Retrieval: -- None --

**Retry Options**

Retry Exit Codes:

Maximum Retries: 0 Retry Indefinitely:

Retry Interval (Seconds): 60 Suppress Intermediate Failures:

**Wait/Delay Options**

Wait To Start: -- None --

Delay On Start: -- None --

Workflow Only: -- System Default --

**Time Options**

Late Start:

Late Finish:

Early Finish:

User Estimated Duration: Day Hour Min Sec

**Critical Path Options**

CP Duration: CP Duration Unit: Minutes

**Workflow Execution Options**

Execution Restriction: -- None --

	All of the associated records (tabs) contain the data as it existed when this version was the current version. At the top of the Details, the <b>Name</b> field contains the name of the record as it existed for the current version. In the Details, the <b>Current &lt;record type&gt;</b> field contains the current name of this record.
<b>Step 4</b>	Click <b>Close</b> to return to the version list.

## Restoring Old Versions of Records

You can restore an old version of a record to the current version. When you restore an old version, the current version will become the newest old version.

<b>Step 1</b>	Display the Details of the record for which you want to restore an old version.
<b>Step 2</b>	Click the <b>Versions</b> tab.
<b>Step 3</b>	Either right-click a Version record in the Versions list and then click <b>Restore Version</b> , or open a Version record and click the <b>Restore Version</b> button.

## Fields Not Restored

The following fields are not restored when you restore an old version of a record.

Record Type	Fields
Trigger (all types)	<ul style="list-style-type: none"> <li>• Disabled By</li> <li>• Execution User</li> <li>• Forecast</li> <li>• Skip Count</li> </ul>
Agent Cluster	<ul style="list-style-type: none"> <li>• Task Execution Limit</li> <li>• Current Task Count</li> <li>• Suspended</li> <li>• Limit Amount</li> <li>• Last Used</li> </ul>
Application	<ul style="list-style-type: none"> <li>• Status</li> <li>• Status Description</li> <li>• Last Known Status</li> <li>• PID</li> <li>• Queued Time</li> <li>• Start Time</li> <li>• Last Query</li> </ul>
Email Connection	<ul style="list-style-type: none"> <li>• Use for System Notifications</li> </ul>

Task (all types)	<ul style="list-style-type: none"> <li>Statistics (Statistics section in Task Details)</li> </ul>
Workflow Task	<ul style="list-style-type: none"> <li>Calculate Critical Path</li> </ul>
Virtual Resource	<ul style="list-style-type: none"> <li>Resource Used</li> </ul>

## Purging Old Versions of Records

The Controller provides two methods for purging old versions of records.

### Note



When you purge old versions of records, the version number of the current version remains the same.

## Purge Specific Versions

<b>Step 1</b>	Display the Details of the record for which you want to purge versions.
<b>Step 2</b>	Click the <b>Version</b> tab to display a list of old versions of that record.
<b>Step 3</b>	Either: <ul style="list-style-type: none"> <li>Ctrl-click one or more versions to be purged, right-click in the row of any selected version, and click <b>Delete</b>.</li> <li>Display the Details of a version that you want to delete and click the <b>Delete</b> button.</li> </ul>

## Purge All Outdated Versions

<b>Step 1</b>	From the <b>Administration</b> navigation pane, select <b>Configuration &gt; Server Operations</b> . The <a href="#">Server Operations</a> list displays.
<b>Step 2</b>	Run the <a href="#">Purge Versions</a> server operation to purge versions that exceed the maximum number of records allowed, as defined by the <a href="#">System Default Maximum Versions</a> Universal Controller property.

## Enabling/Disabling Versioning

Two properties are available that allow you to control if and when the Controller automatically creates a new version of a record (and all its associated records):

- The [Automatically Create Versions](#) Universal Controller system property (true or false) determines whether modifications to the record itself will cause the Controller to create a new version of the record. The default value is true. If this property is set to false, the Controller does not create versions.
- The [Create Version On Related List Change](#) Universal Controller system property (true or false) determines whether changes, deletions, or additions to a related list will cause the Controller to create a new version of the record. For example, if this property is enabled, the Controller will create a new version of the task and all its associated records when the user adds a variable to the task, deletes a Note, or changes an Email Notification. The default value is true. If this property is set to false, and the [Automatically Create Versions](#) property is set to true, the Controller creates a new version only if the base record is updated.

To change one or both of these properties:

<b>Step 1</b>	From the <b>Administration</b> navigation pane, select <b>Configuration &gt; Properties</b> .
<b>Step 2</b>	Locate the property you want to change.
<b>Step 3</b>	Double-click the <b>Value</b> and select <b>true</b> or <b>false</b> .

## Exporting and Importing Records

There are two different types of exports/imports:

- [Bulk exports/imports](#) let you export/import all records in a Controller database.
- [List exports/imports](#) let you export/import all records selected on a list.

Note



[Critical Path](#) settings for tasks and Workflows are not exported/imported.

Important!



It is strongly recommended that you do NOT use the Import and Export functions for modification of Universal Controller records. API functions are available if you need to programmatically update, copy, insert, or otherwise manipulate Universal Controller records.

### Bulk Export/Import

Universal Controller provides [Server Operations](#) (in Controller 5.2.0 and earlier: maintenance scripts) that allow you to perform a [bulk export](#) and [bulk import](#) of all records in your Controller database.

Normally, you would use bulk export and bulk import to migrate data, in bulk, from an existing Universal Controller deployment to a new Universal Controller deployment. If you are [upgrading from Universal Controller 5.2.0](#), you would also migrate data using bulk export and bulk import.

See:

- [Run an Import](#)
- [Run an Export](#)

### List Export/Import

You also can perform a [list export](#) of records selected on a list, or a [list import](#) of an XML file to any list for a specific record type.

## Updating Multiple Records

You can update multiple records from any of the following lists:

- Agents list for any [Agent type](#) (Credentials field and Member of Business Services field only)
- [All Agents](#) list (Credentials field and Member of Business Services field only)
- Tasks list for any [task type](#)
- [All Tasks](#) list
- Triggers list for any [trigger type](#)

- [All Triggers](#) list
- [Database Connections](#), [Email Connections](#), [PeopleSoft Connections](#), and [SAP Connections](#) lists
- [SNMP Managers](#) list
- [Credentials](#) list (all fields except Type and Key Location (FTP only))
- [Email Templates](#) list
- [Global Variables](#) list
- [Scripts](#) list
- [Users](#) (these fields only: Active, Command Line Access, Department, Locked Out, Manager, Password, Password Requires Reset, Time Zone, Web Browser Access, Web Service Access)
- [Virtual Resources](#) list

There are two [actions](#) available for updating multiple records:

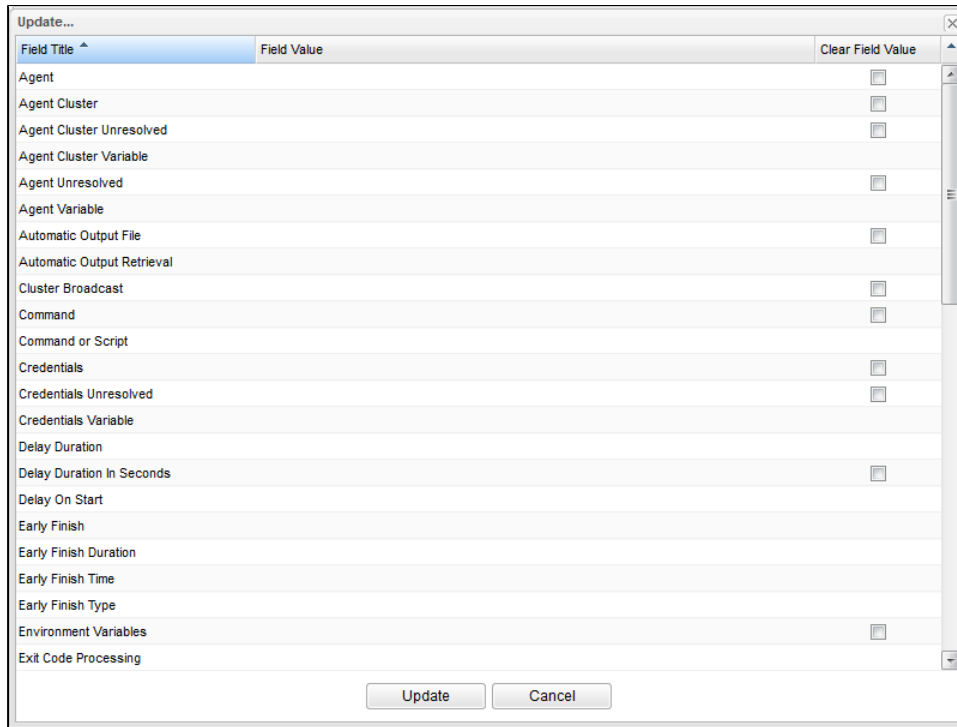
1. [Update](#) - Updates all [manually selected records](#) on the list.
2. [Update Filtered](#) - Updates all records that [match the currently selected filter](#) for the list.

Updates are applied and validated per selected record, since a valid update for one record may not be valid for another. A validation failure for one update does not prevent the update of other records.

## Updating Manually Selected Records

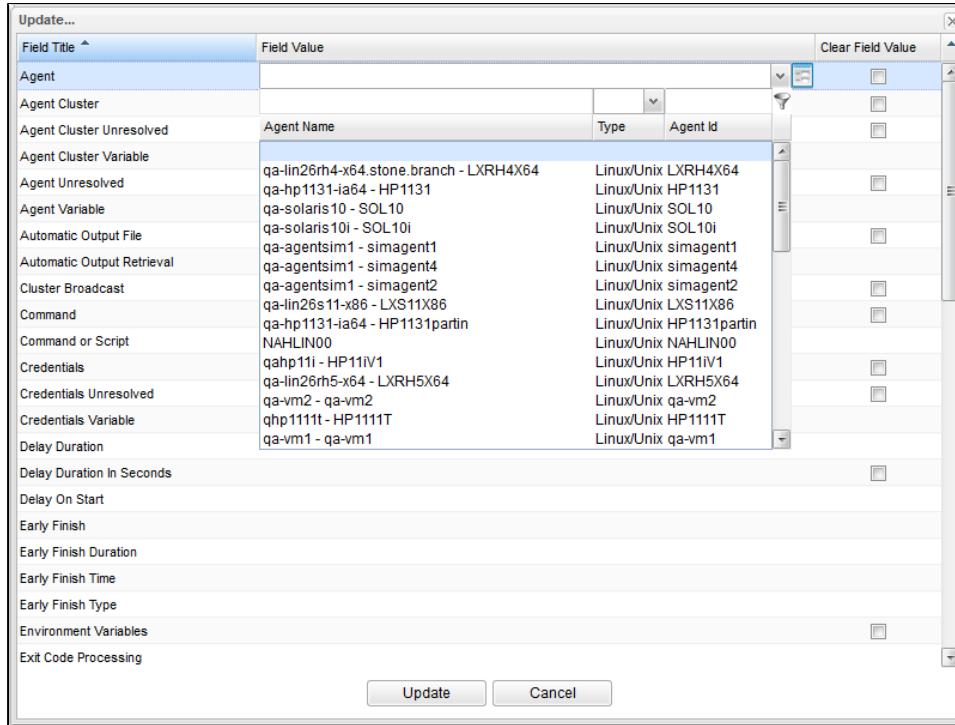
<b>Step 1</b>	Select the list from which you want to update multiple records.
<b>Step 2</b>	Ctrl-click each record on the list that you want to update.
<b>Step 3</b>	Right-click any of the selected records to display an <a href="#">Action menu</a> .

**Step 4** Click **Update...** to display the **Update** dialog, which lists every field that can be updated for that record type (since read-only fields cannot be updated, they are not displayed).  
 For example, the following **Update** dialog displays if you select multiple [Linux/Unix Task](#) records.



**Step 5** For any field, click anywhere in the **Field Value** cell to display an editor where you can enter / select a value.

For example, if you click the **Agent** row, a drop-down list displays that lets you select any currently defined Linux/Unix Agent.



**Step 6** If you want to clear the value of a field for each selected record and not select a new value, click the **Clear Field Value** check box.

**Step 7** Click the **Update** button to update all of the fields with the changed values.

## Updating Records That Match the Current Filter

**Step 1** Select the list from which you want to update multiple records.

**Step 2** Create a [Filter](#) to display only those records that you want to update.

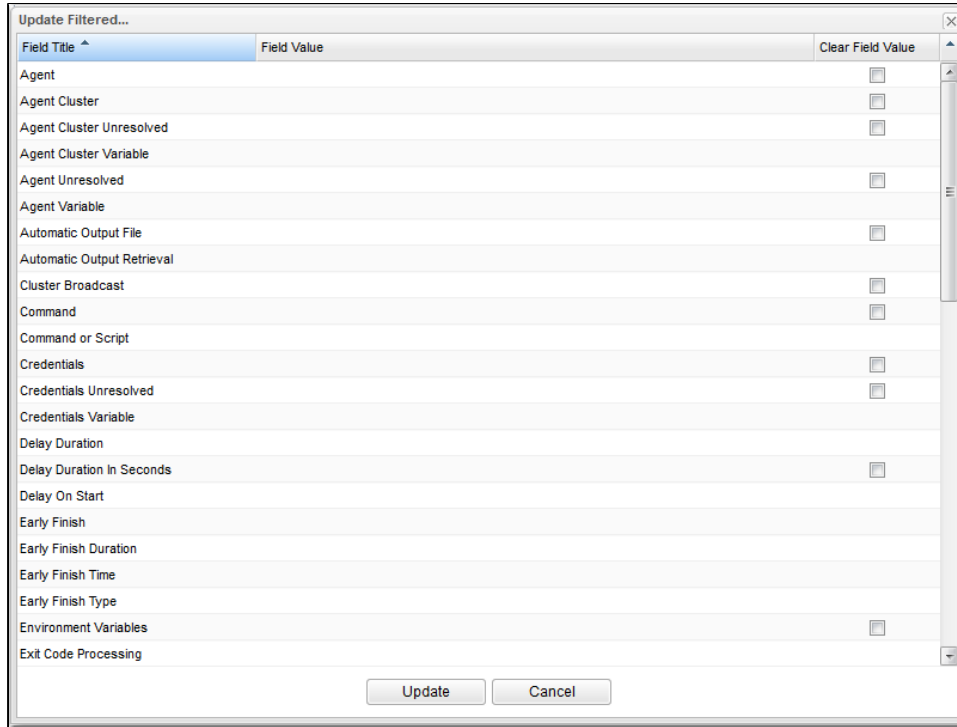
**Step 3** Right-click the list header to display an [Action menu](#).

**Step 4** Click **Update Filtered....** A Confirm pop-up displays.

**Step 5**

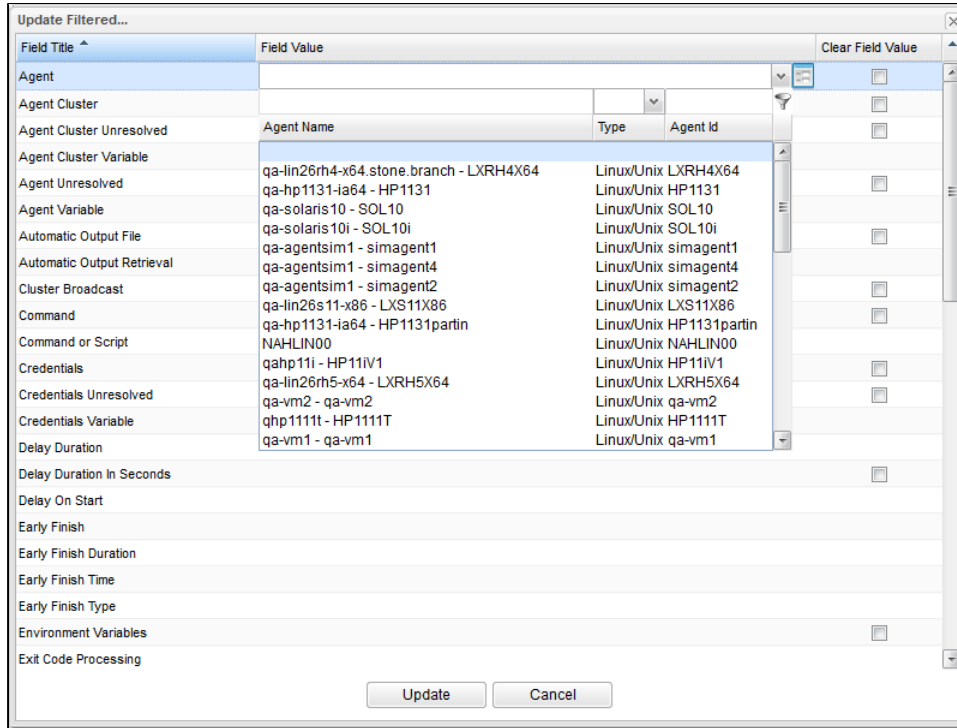
Click **OK** to display the **Update Filtered** dialog, which lists every field that can be updated for that record type (since read-only fields cannot be updated, they are not displayed).

For example, the following **Update Filtered** dialog displays if you select multiple [Linux/Unix Task](#) records.



**Step 6** For any field, click anywhere in the **Field Value** cell to display an editor where you can enter / select a value.

For example, if you click the **Agent** row, a drop-down list displays that lets you select any currently defined Linux/Unix Agent.



**Step 7** If you want to clear the current value of a field for each selected record and not select a new value, click the **Clear Field Value** check box.

**Step 8** Click the **Update** button to update all of the fields with the changed values.

## Update / Update Filtered Dialog Columns

The following columns display on the Update / Update Filtered dialog:

<b>Field Title</b>	Name of the field as displayed in the <a href="#">Record Details</a> .
<b>Field Value</b>	Value that you want to select for this field in all of the selected records.
<b>Clear Field Value</b>	Check box indicating whether or not to clear the value from this field when the record is updated. By default, this column is unselected for all fields.  For fields that cannot be blank (for example, fields that demand a <b>yes</b> or <b>no</b> value), the check box will not be displayed.

Since read-only fields cannot be updated, they are not displayed on the List.

If you are updating multiple records on the [All Tasks](#) list or [All Triggers](#) list, the Update / Update Filtered dialog contains only fields that are common to all types of tasks or triggers.

Note



When updating manually selected Universal Task records on the [All Tasks](#) list, the Update dialog will only contain [mapped fields](#) if all of the records have the same Universal Template UUID (that is, those Universal Tasks were based on the same Universal Template).

## Update / Update Filtered Dialog Variable Fields for Tasks

The [Record Details](#) for many individual [tasks](#) contain one or more Variable fields that allow you enter a variable instead of a record.

For example:

If you select **Agent Variable** in the Details for a single Linux/Unix task, the **Agent** field converts from a reference field (where you browse and select a record) into a text field that allows you to enter the variable.

In the Update / Update Filtered dialog for multiple tasks, the **Agent** field is not converted into a text field if you select **Agent Variable**. Instead, an additional field - **Agent Unresolved** - is provided, into which you enter a variable, variable and text, or Agent name. The **Agent** field is not used.

Field Title ^	Field Value	Clear Field Value
Agent		<input type="checkbox"/>
Agent Cluster		<input type="checkbox"/>
Agent Cluster Unresolved		<input type="checkbox"/>
Agent Cluster Variable		
Agent Unresolved		<input type="checkbox"/>
Agent Variable	Yes	
Automatic Output File		<input type="checkbox"/>
Automatic Output Retrieval		
Cluster Broadcast		<input type="checkbox"/>
Command		<input type="checkbox"/>
Command or Script		
Credentials		<input type="checkbox"/>
Credentials Unresolved		<input type="checkbox"/>
Credentials Variable		
Delay Duration		
Delay Duration In Seconds		<input type="checkbox"/>
Delay On Start		
Early Finish		
Early Finish Duration		
Early Finish Time		
Early Finish Type		
Environment Variables		<input type="checkbox"/>
Exit Code Processing		

## Uploading Records

You can upload records (as contained in a zip and/or JSON file) from your local system to any of the following lists:

- [Agent Clusters](#) list
- [Bundles](#) list
- [Business Services](#) list
- [Calendars](#) list
- [Connections](#) list ([Database Connections](#), [Email Connections](#), [PeopleSoft Connections](#), and [SAP Connections](#))
- [Credentials](#) list
- [Custom Days](#) list

- [Email Templates](#) list
- [OMS Servers](#) list
- [Promotion Targets](#) list
- [Scripts](#) list
- [SNMP Managers](#) list
- [Tasks](#) list (for any [task type](#))
- [All Tasks](#) list
- [Triggers](#) list (for any [trigger type](#))
- [All Triggers](#) list
- [Variables](#) list
- [Virtual Resources](#) list

The Upload operation takes a zip file (containing one or more files) or a JSON file.

- For a zip file, each JSON file in the zip file will be parsed, and non-JSON files will be ignored.
- For a JSON file, the file is parsed to update/create a record.

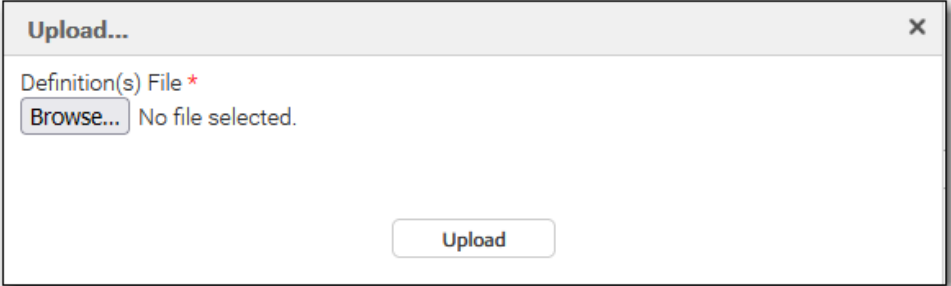
Note

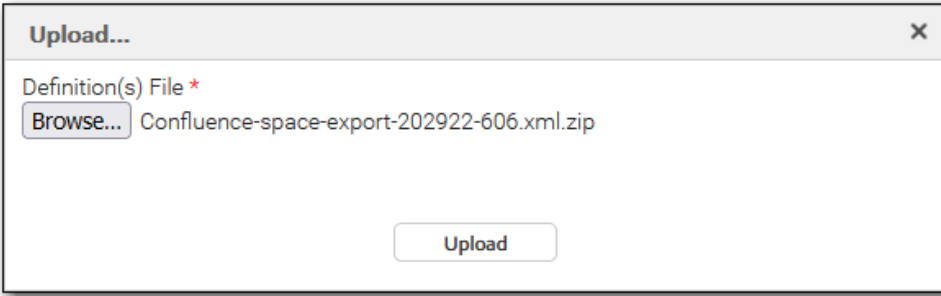


A zip can contain multiple files, where each file could be for a different record type. For example, the zip might contain two files; one file for a task and one file for a trigger. The zip file can be uploaded from any list that supports upload (for example; tasks list, triggers list, and calendars list). When the zip file has been successfully uploaded, both the task record and the trigger record will be uploaded.

A JSON file contains data for one record type only. The `exportTable` property in the JSON file is used to identify the record type. Any file without this attribute will be ignored.

- For a record type that supports download/upload, the JSON response from Read web service API contains the `exportTable` property.
- For a Read response from an older release, you must manually add the `exportTable` property in order to be upload compatible.

<b>Step 1</b>	Right-click any column on any list that supports uploads to display an <a href="#">Action menu</a> .
<b>Step 2</b>	Click <b>Upload...</b> to display the Upload dialog. 

<b>Step 3</b>	Click <b>Browse</b> to Select a file to upload.
	
<b>Step 4</b>	Click <b>Upload</b> to upload the selected file.

## Downloading Records

You can download multiple records from a list (or download a single record from its record details) from any of the following lists:

- [Agent Clusters](#) list
- [Bundles](#) list
- [Business Services](#) list
- [Calendars](#) list
- [Connections](#) list ([Database Connections](#), [Email Connections](#), [PeopleSoft Connections](#), and [SAP Connections](#))
- [Credentials](#) list
- [Custom Days](#) list
- [Email Templates](#) list
- [OMS Servers](#) list
- [Promotion Targets](#) list
- [Scripts](#) list
- [SNMP Managers](#) list
- [Tasks](#) list (for any [task type](#))
- [All Tasks](#) list
- [Triggers](#) list (for any [trigger type](#))
- [All Triggers](#) list
- [Variables](#) list
- [Virtual Resources](#) list

There are two [actions](#) available for downloading records from a list:

- [Download](#)  
Downloads all [manually selected records](#) on the list.
- [Download Filtered](#)  
Downloads all records that [match the currently selected filter](#) for the list.

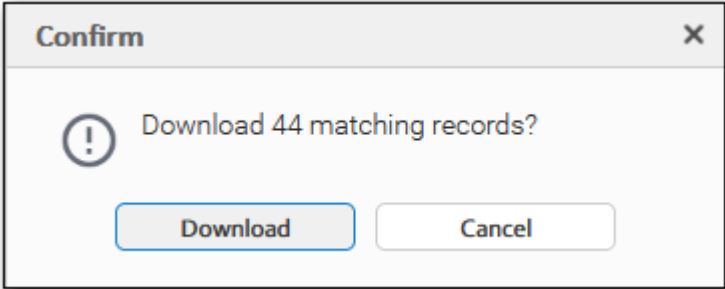
There is one [action](#) available for downloading a single record from its record details:

- [Download](#)  
Downloads the current record.

### Download Manually Selected Records from a List

<b>Step 1</b>	Select the list from which you want to download multiple records.
<b>Step 2</b>	Ctrl-click each record on the list that you want to download.
<b>Step 3</b>	Right-click any of the selected records to display an <a href="#">Action menu</a> .
<b>Step 4</b>	Click <b>Download</b> to download the selected records.

## Download Records That Match the Current Filter

<b>Step 1</b>	Select the list from which you want to download multiple records.
<b>Step 2</b>	Create a <a href="#">Filter</a> to display only those records that you want to download.
<b>Step 3</b>	Right-click the list header to display an <a href="#">Action menu</a> .
<b>Step 4</b>	Click <b>Download Filtered....</b> A Confirm pop-up displays.
	
<b>Step 5</b>	Click <b>Download</b> to download the matching records

## Download a Single Record from its Record Details

<b>Step 1</b>	Select the list from which you want to download a single record.
<b>Step 2</b>	Open the record that you want to download.
<b>Step 3</b>	Right-click anywhere in the record details to displays an <a href="#">Action menu</a> .
<b>Step 4</b>	Click <b>Download</b> to download the record.

Note



You also can download a single record by [manually selecting](#) it from the records list.



# Record Lists

- [Introduction](#)
- [List Task Bar](#)
- [Formatting a List](#)
- [Sorting](#)
  - [Sorting by Type](#)
  - [Configure a Multi-Level Sort](#)
- [Filtering](#)
- [Selecting Columns / Column Locations for a List](#)
- [List Layouts](#)
  - [Layouts Menu](#)
  - [Selecting a Layout for a List](#)
  - [Saving a Layout](#)
  - [Saving a Layout As Your Default Layout](#)
  - [Deleting a Layout](#)
- [Hiding a List \(or Details\)](#)
- [Adding Records from a List](#)
- [Deleting Records from a List](#)
- [Updating Multiple Records from a List](#)
- [Uploading Records to a List](#)
- [Downloading Multiple Records from a List](#)
- [Performing Actions on One or More Records from a List](#)
- [Exporting Records to an Output File](#)
  - [Exporting Records to CSV, PDF, XLS \(Excel\), or XLSX](#)
  - [Exporting Records to XML, XML \(Export References\), or Permissions for Group](#)
- [Importing Records from a File](#)

## Introduction

A record list is either a:

- Listing of records of the same type, such as tasks, calendars, or users.
- Listing of all records of the same type or category, such as all tasks or active triggers.

When you click a record type in the [Services](#), a list of currently defined records for that record type displays.

## List Task Bar

A task bar displays at the top of every list. For example:

User Id (Username) ^	Name	Locked Out	Active	Updated By	Updated
stonebranch-user-01	stonebranch 01	No	✓	ops.admin	2018-07-20 16:40:00 -0400
stonebranch-user-02	stonebranch 02	No	✓	ops.admin	2020-01-17 11:29:56 -0500
stonebranch-user-03	stonebranch 03	No	✓	ops.admin	2018-07-20 16:41:22 -0400
stonebranch-user-04	stonebranch 04	No	✓	ops.admin	2018-07-20 16:41:56 -0400
stonebranch-user-05	stonebranch 05	No	✓	ops.admin	2018-07-20 16:42:19 -0400

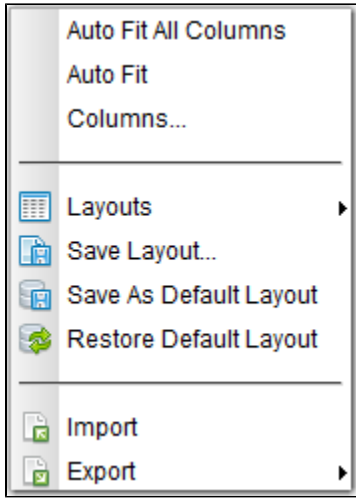
The following table describes the different elements that can appear on a list task bar and the function of each element:

Task Bar Element	Function
	Allows you display or hide the list.
	Allows you to <a href="#">apply an existing filter</a> to the records on the list. The default selection is <b>-- No Filter --</b> (no Filter is applied). Click the down arrow to display a list of existing filters.
	Allows you to <a href="#">create, view, or edit a filter</a> that you can save or apply to the records on the list.
	Allows you to create a quick <a href="#">record name filter</a> that you can apply (but not save) to the records on the list.
	Allows you to create a new record of the record type displayed on the list.
	Allows you to refresh any dynamic data displayed on the list.

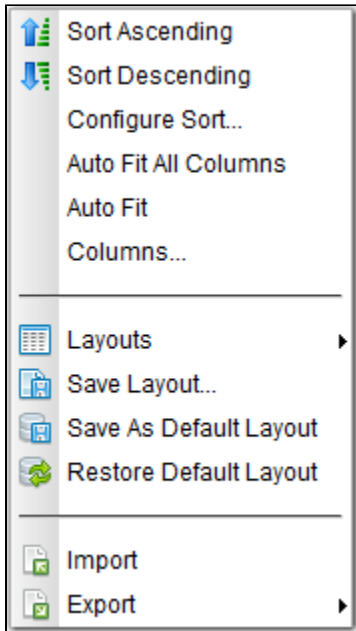
## Formatting a List

For every list in the user interface, an [Action menu](#) of formatting options is available.

To display the menu of formatting options, click the down arrow that appears over the Detail icons column.



For all lists, you can right-click any column header on the list to display an [Action menu](#) of formatting options preceded by sort actions for the selected column.



See [Action Menus](#) for a description of these formatting and sort options.

## Sorting

By default, lists are sorted by **<record type> Name** in ascending, alphanumeric order (0-9, a-z).

You can sort a list in ascending or descending order of the entries in any displayed column.

There are two ways to sort a list:

1. Click a column header; the list is sorted in ascending order of the entries in that column. A small arrow appears to the left of the column name to indicate the direction of sort. An up arrow indicates ascending alphanumeric order; a down arrow indicates descending alphanumeric. Re-click the header to reverse the direction of sort.
2. Right-click a column header to display an **Action menu** and click either:
  - [Sort Ascending](#)
  - [Sort Descending](#)

## Sorting by Type

Type columns, such as Permission Type, Task Type, or Task Instance Status, are sorted by the Type underlying integer values, not alphabetically by the Type display names.

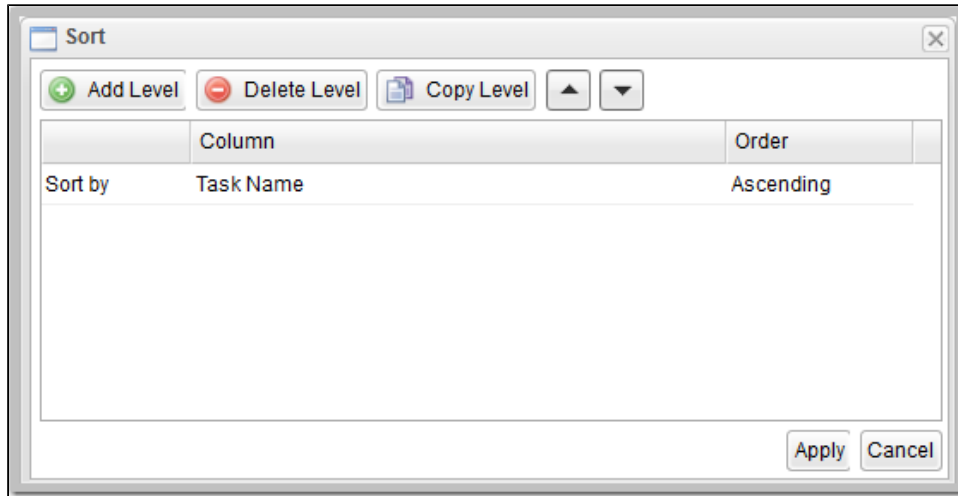
For example, if you sort the list of task instances on the Activity Monitor by **Status**, the list is sorted by the numeric Status Code, not the alphabetic Status Name:

Instance Name	Type	Status	Invoked By	Start Time	End Time	Updated
Delete_Me	Windows	Held	Manually Launched			2016-06-16 16:02:18 -0400
win-exit-code	Windows	Failed	Manually Launched	2016-06-17 11:27:35 -0400	2016-06-17 11:27:35 -0400	2016-06-17 11:27:35 -0400
win-exit-code	Windows	Failed	Manually Launched	2016-06-17 11:29:33 -0400	2016-06-17 11:29:33 -0400	2016-06-17 11:29:33 -0400
QA-sap-task-insert-QAJOB	SAP	Skipped	Workflow: centerpoint-update-install-status		2016-06-17 11:37:10 -0400	2016-06-17 11:37:10 -0400
centerpoint-update-install-ivp-status-v2	Linux/Unix	Finished	Workflow: centerpoint-update-install-status	2016-06-06 07:02:05 -0400	2016-06-06 07:03:35 -0400	2016-06-17 11:23:59 -0400
centerpoint-update-install-ivp-status-v1	Linux/Unix	Finished	Workflow: centerpoint-update-install-status	2016-06-17 11:36:58 -0400	2016-06-17 11:39:18 -0400	2016-06-17 11:39:19 -0400
task-monitor	Task Monitor	Finished	Manually Launched	2016-06-17 11:28:19 -0400	2016-06-17 11:31:27 -0400	2016-06-17 11:31:27 -0400
zos-test-3	z/OS	Finished	Manually Launched		2016-06-17 13:23:12 -0400	2016-06-17 13:23:12 -0400
zos-test-3	z/OS	Finished	Manually Launched	2016-06-17 13:22:38 -0400	2016-06-17 13:23:02 -0400	2016-06-17 13:24:36 -0400
centerpoint-update-install-status	Workflow	Success	Trigger: QA-update	2016-06-06 06:07:01 -0400	2016-06-17 11:23:59 -0400	2016-06-17 11:23:59 -0400
MAN_VL2	z/OS	Success	Manually Launched	2016-06-15 14:26:35 -0400	2016-06-15 14:26:37 -0400	2016-06-15 14:26:58 -0400
D_Date	Windows	Success	Trigger: D_WinDIR_trigger3	2016-06-16 13:25:00 -0400	2016-06-16 13:25:00 -0400	2016-06-16 13:25:00 -0400
D_WinDIR	Windows	Success	Trigger: D_WinDIR_trigger3	2016-06-16 13:25:01 -0400	2016-06-16 13:25:08 -0400	2016-06-16 13:25:08 -0400
B2	Timer	Success	Manually Launched	2016-06-16 16:14:17 -0400	2016-06-16 16:17:17 -0400	2016-06-16 16:17:17 -0400
test-unix	Linux/Unix	Success	Manually Launched	2016-06-16 23:32:09 -0400	2016-06-16 23:32:09 -0400	2016-06-16 23:32:09 -0400
centerpoint-update-install-status	Workflow	Success	Trigger: QA-update	2016-06-17 11:24:47 -0400	2016-06-17 11:44:14 -0400	2016-06-17 11:44:14 -0400
centerpoint-cvs-update-qa	Linux/Unix	Success	Workflow: centerpoint-update-install-status	2016-06-17 11:24:48 -0400	2016-06-17 11:36:58 -0400	2016-06-17 11:36:58 -0400
QA-sap-task-verify-QAJOB	SAP	Success	Workflow: centerpoint-update-install-status	2016-06-17 11:36:58 -0400	2016-06-17 11:37:10 -0400	2016-06-17 11:37:10 -0400
centerpoint-update-install-ivp-status-v2	Linux/Unix	Success	Workflow: centerpoint-update-install-status	2016-06-17 11:39:19 -0400	2016-06-17 11:44:13 -0400	2016-06-17 11:44:13 -0400
zos-test-3	z/OS	Success	Manually Launched	2016-06-17 13:24:21 -0400	2016-06-17 13:24:23 -0400	2016-06-17 13:24:45 -0400
D_Date	Windows	Success	Trigger: D_WinDIR_trigger3	2016-06-17 13:25:01 -0400	2016-06-17 13:25:01 -0400	2016-06-17 13:25:00 -0400
D_WinDIR	Windows	Success	Trigger: D_WinDIR_trigger3	2016-06-17 13:25:01 -0400	2016-06-17 13:25:08 -0400	2016-06-17 13:25:08 -0400
zos-test-3	z/OS	Success	Manually Launched	2016-06-17 13:28:36 -0400	2016-06-17 13:28:38 -0400	2016-06-17 13:29:00 -0400

## Configure a Multi-Level Sort

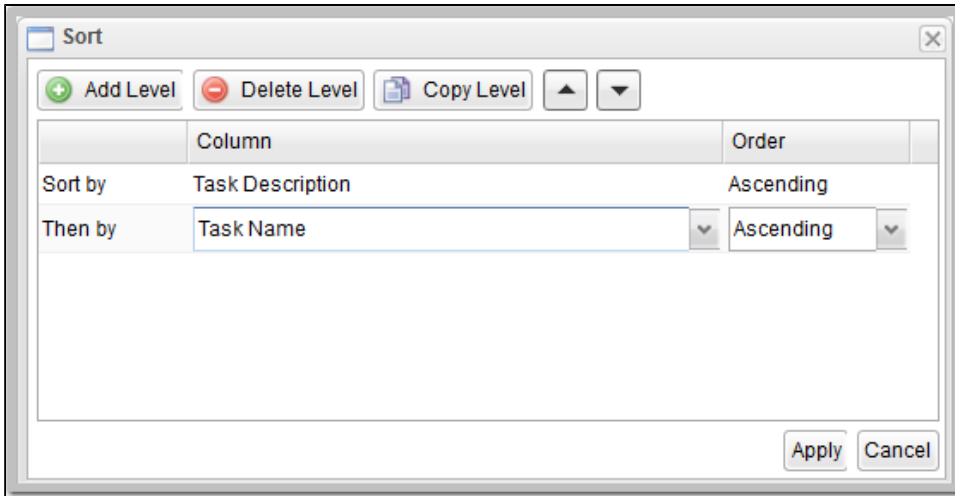
You can use the [Configure Sort](#) action to create a temporary, multi-level sort for any column.

- Step 1 Click a column header to sort the list by the currently defined sort level of that column (default is column name in ascending order).
- Step 2 Right-click the same column header to display an [Action menu](#).
- Step 3 Click **Configure Sort...** to display the Sort dialog.



The **Sort By** row identifies the default **Column** and **Order** by which the list is sorted if you click the column header.

Step 4 Click the **Add Level** or **Copy Level** button to add a **Then by** row to the list.



Step 5 Select a **Column** and **Order** for **Then by**.

Step 6 Add as many sort levels as desired. To remove a level from the dialog (including the default level), select it and then click **Delete Level**. Use the up and down arrow buttons to re-arrange the order of the levels.

Step 7 Click **Apply**. The list is sorted according to the levels that you have defined. Numbers display next to the column headers, identifying the sort order.

For example:

Trigger	Task	Task Type	Workflow	Launch Time	End Time
Simple Workflow Trigger	Timer2	Timer	Simple Workflow	2015-04-08 00:00:12 -0400	2015-04-08 00:00:00
Simple Workflow Trigger	Timer3	Timer	Simple Workflow	2015-04-08 00:00:12 -0400	2015-04-08 00:00:00
Simple Workflow Trigger	Timer4	Timer	Simple Workflow	2015-04-08 00:00:12 -0400	2015-04-08 00:00:00
Simple Workflow Trigger	Timer5	Timer	Simple Workflow	2015-04-08 00:00:43 -0400	2015-04-08 00:00:00
Simple Workflow Trigger	Timer6	Timer	Simple Workflow	2015-04-08 00:00:43 -0400	2015-04-08 00:00:02
Simple Workflow Trigger	Simple Workflow	Workflow	Simple Workflow	2015-04-09 00:00:00 -0400	2015-04-09 00:00:02
Simple Workflow Trigger	Timer1	Timer	Simple Workflow	2015-04-09 00:00:00 -0400	2015-04-09 00:00:00
Simple Workflow Trigger	Timer2	Timer	Simple Workflow	2015-04-09 00:00:12 -0400	2015-04-09 00:00:00
Simple Workflow Trigger	Timer3	Timer	Simple Workflow	2015-04-09 00:00:12 -0400	2015-04-09 00:00:00
Simple Workflow Trigger	Timer4	Timer	Simple Workflow	2015-04-09 00:00:12 -0400	2015-04-09 00:00:00
Simple Workflow Trigger	Timer5	Timer	Simple Workflow	2015-04-09 00:00:43 -0400	2015-04-09 00:00:00
Simple Workflow Trigger	Timer6	Timer	Simple Workflow	2015-04-09 00:00:43 -0400	2015-04-09 00:00:02
Simple Workflow Trigger	Simple Workflow	Workflow	Simple Workflow	2015-04-10 00:00:00 -0400	2015-04-10 00:00:02

Step 8	To remove the temporary sort levels for the column, either: <ul style="list-style-type: none"><li>• Click anywhere in the list header row.</li><li>• Right-click the column header of the column you were sorting and click <b>Clear Sort</b>.</li></ul>
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## Filtering

You can apply a filter to a list so that it temporarily displays only records matching the filter criteria, and you can create and save a filter that can be applied at any time to the list.

You also can create a quick filter that will filter a list by full or partial record name.

For detailed information on creating and applying filters, see [Filters](#).

## Selecting Columns / Column Locations for a List

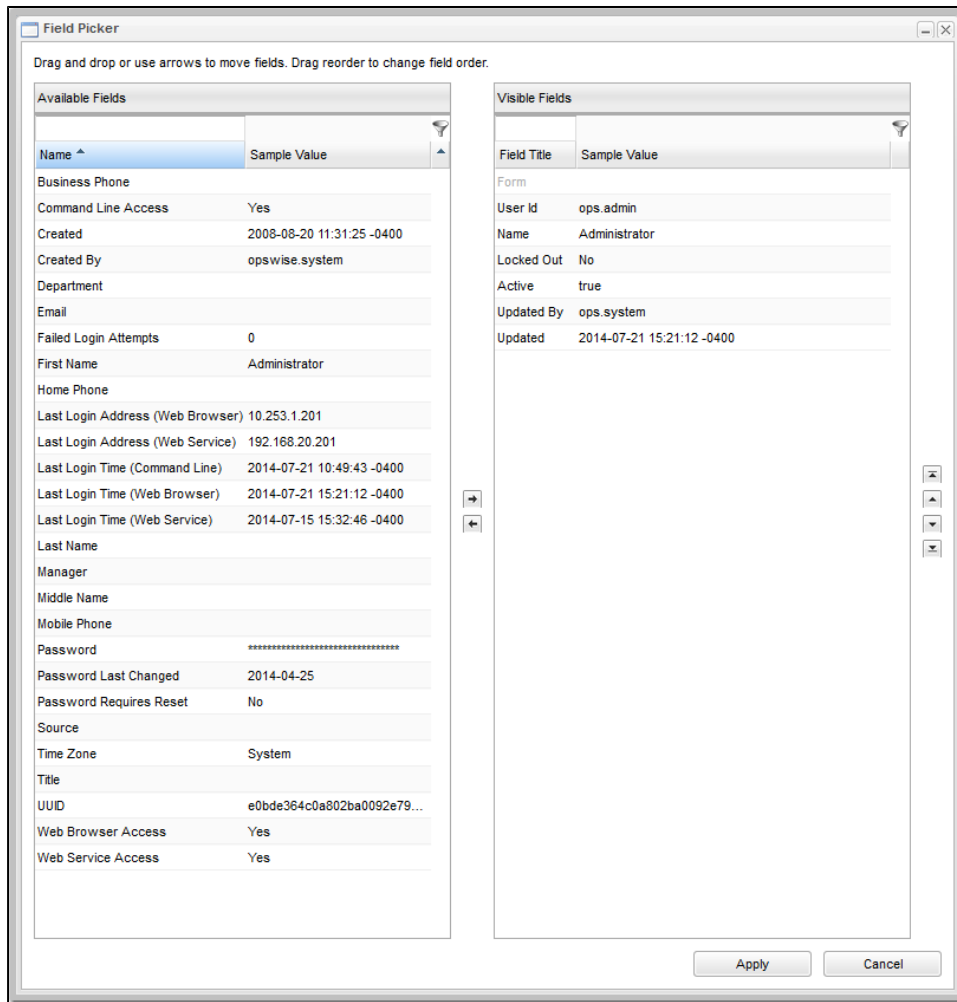
Initially, all lists display default columns of information in default locations. You can change a list to display any available column in any location.

The columns are based on the fields that exist for a record type in the Controller database; all fields that display in the user interface, including [Metadata](#) fields, are available as columns.


To select which columns you want displayed on a list:

Step 1	Display the list.
Step 2	Access the Action menu of <a href="#">list formatting options</a> .

**Step 3** Click **Columns...** to display the Field Picker pop-up dialog. (The following example shows the Field Picker pop-up that displays for the Users list.)



- The **Available Fields** window lists the fields that currently are not displayed on the list but are available for display.
- The **Visible Fields** window lists the fields that currently are displayed on the list (in left-to-right sequence).

<b>Step 4</b>	<p>Drag and drop fields between the Available Fields and Visible Fields windows, as appropriate for whichever fields you want displayed on the list.</p> <p>You can drag and drop a field from the Available Fields window into any location in the Visible Fields window, and you can drag and drop any field in the Visible Fields window to a new location. Fields dragged from the Visible Fields window to the Available Fields are automatically dropped into location based on alphabetical order.</p> <p>Note  You also can:</p> <ul style="list-style-type: none"> <li>• Move any field between the Available Fields and Visible Fields windows by clicking the field and then clicking the &gt; or &lt; arrow.</li> <li>• Relocate any field by dragging and dropping the corresponding column directly on the list.</li> </ul>
<b>Step 5</b>	To filter the fields listed in either window, enter characters in the text field above the Name column. Only fields containing that sequence of characters will display in the list.
<b>Step 6</b>	Click the <b>Apply</b> button on the Field Picker dialog to save your relocation selections.

## List Layouts

Every list displays in its System Default layout when you first log in to the Controller.

You can sort, filter, select, and/or relocate columns in a list, and save that configuration of the list as a new layout.

You can create any number of layouts for a list, and:

- Pin any layout to a list, making it your Default layout whenever you display that list.
- Select any layout as a temporary layout for the list while it currently is being displayed.


To select a layout for a list, access the [Action menu](#), which provides the following selections for saving and selecting list layouts:




<b>Layouts &gt;</b>	Displays a <a href="#">menu of all layouts</a> , including the <a href="#">System Default</a> layout, that you can apply to the list.
<b>Save Layout...</b>	Saves the current configuration of the list as a new layout and displays the layout in the <a href="#">Layouts menu</a> .
<b>Save As Default Layout</b>	For the <a href="#">ops_admin</a> role only; Saves the current configuration of the list as the System Default layout for this list.
<b>Restore the Default Layout</b>	For the <a href="#">ops_admin</a> role only; Restores the System Default layout of this list to the original <a href="#">System Default</a> layout.

## Layouts Menu

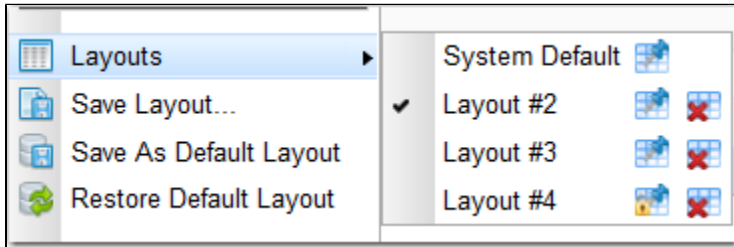
The Layouts menu identifies all currently defined layouts for the list, including the [System Default](#) layout.

The following icons can appear in a Layouts menu:

Icon	Description
	Default Layout Indicates that this layout has been pinned as the Default layout for this list.

	<p>Layout Identifies every layout - including the <a href="#">System Default</a> layout - that is not pinned as your Default layout for this list.</p>
	<p>Delete Layout Lets you delete a layout (except the <a href="#">System Default</a> layout).</p>
	<p>Check Mark Indicates the list layout that currently is selected for the list. This layout will display for the list - including any modifications made since the layout was selected - until you close, and then re-open, the list.</p>

For example:



In this Layouts menu, the [Default Layout icon](#) next to Layout #4 indicates that Layout #4 has been pinned as your Default layout for the list, and the [check mark](#) next to Layout #2 indicates that Layout #2 has been selected as the current layout for the list.

## Selecting a Layout for a List

There are two ways to select a layout for a list:

1. Click the name of the layout in the [Layouts menu](#). The [check mark](#) will display next to that layout, indicating that it is the currently selected layout for the list.
2. Click the [Layout icon](#) next to the layout. The [Default Layout icon](#) and the [check mark](#) will display next to that layout, indicating that it is the currently selected layout for the list and is pinned as the [Default layout](#) for the list.

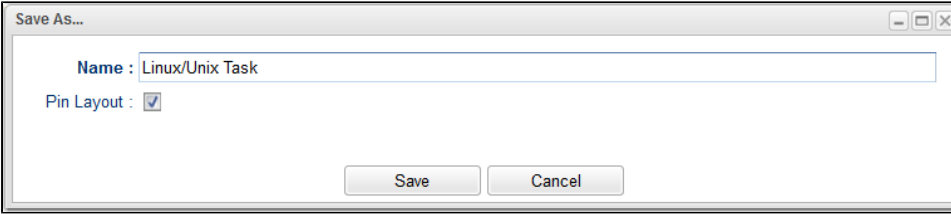
Note



Pinning a layout as your Default layout also selects it as the currently displayed layout, but selecting a layout as the currently displayed layout does not pin it as your Default layout.

## Saving a Layout

You can save any configuration of a list as a list layout.

<p><b>Step 1</b></p>	<p>Select <a href="#">Save Layout...</a> from the Action menu. A Save As... pop-up dialog displays.</p> 
<p><b>Step 2</b></p>	<p>Enter a <b>Name</b> for the layout. (By default, the dialog displays the record type of the list as the <b>Name</b>.)</p>
<p><b>Step 3</b></p>	<p>Select whether or not you want to pin the layout as your Default layout for this list.</p>

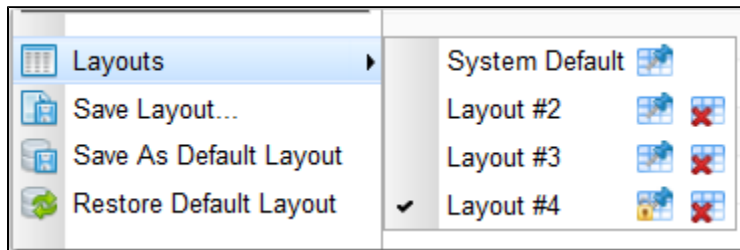
You can display a layout for a list without pinning it as your Default layout by clicking the layout name in the **Layout >** menu. The list will display in the selected layout, but your Default layout will remain the same.

## Saving a Layout As Your Default Layout

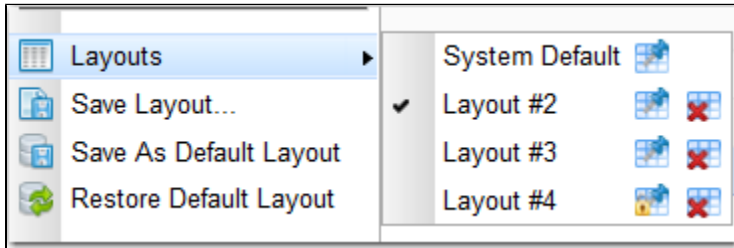
To save a layout as your Default layout for a list, which pins the layout to the list, click the [Layout](#) icon next to that layout in the Layouts menu. The [Default Layout](#) icon then displays next to that layout.

Saving a layout as your Default layout for a list does not make that layout the System Default layout; it only means that for you, as the user that saved the layout, it is pinned as your Default layout for the list whenever you display the list.

In the following example, Layout #4 has been selected as the your Default layout for the list, which automatically selects it as the currently displayed layout.



In the following example, Layout #4 has been pinned as the your Default layout for the list, and Layout #2 subsequently has been selected as the currently displayed layout.



## Deleting a Layout

To delete a list layout, click the [Delete Layout](#) icon that appears next to every layout (except the [System Default](#) layout, which cannot be deleted) in the Layouts menu.

If you delete a layout that is pinned as your Default layout for the list, the System Default layout automatically becomes your Default layout for the list.

## Hiding a List (or Details)

You can temporarily hide a list of records or the record Details that displays below the list.

If you hide a list, more Details can display on the page; if you hide the Details, more records in the list can display.

- To hide a list of records, click the down arrow ( v ) at the top of the list.
- To hide the record Details, click the down arrow ( v ) at the top of the Details.

The screenshot displays the 'Linux/Unix Tasks' section of the Universal Controller. At the top, there is a navigation bar with 'Dashboards' and 'Linux/Unix Tasks'. Below this is a table listing five tasks, all named 'stonebranch-linuxunixtask-01' through '05'. The table columns are Name, Description, Command or Script, Updated By, and Updated. Below the table is a 'Linux/Unix Task Details' section with tabs for Variables, Actions, Virtual Resources, Mutually Exclusive, Instances, Triggers, Notes, and Versions. The 'General' tab is active, showing fields for Name, Description, Member of Business Services, Resolve Name Immediately, Hold on Start, Virtual Resource Priority (set to 10), Time Zone Preference (set to -- System Default --), and Hold Resources on Failure. The 'Agent Details' section includes Cluster, Agent, Credentials, Run as sudo, Agent Variable, and Credentials Variable. The 'Linux/Unix Details' section includes Command or Script (set to Command), Command, Parameters, and Runtime Directory.

Name	Description	Command or Script	Updated By	Updated
stonebranch-linuxunixtask-01		Command	ops.admin	2019-08-05 14:37:25 -0400
stonebranch-linuxunixtask-02		Command	ops.admin	2020-01-07 10:17:17 -0500
stonebranch-linuxunixtask-03		Command	ops.admin	2020-01-07 10:17:40 -0500
stonebranch-linuxunixtask-04		Command	ops.admin	2020-01-07 10:17:54 -0500
stonebranch-linuxunixtask-05		Command	ops.admin	2020-01-07 10:18:11 -0500

To redisplay a hidden list or Details, click the up arrow ( ^ ) that replaced down arrow ( v ) when you hid the list or Details.

## Adding Records from a List

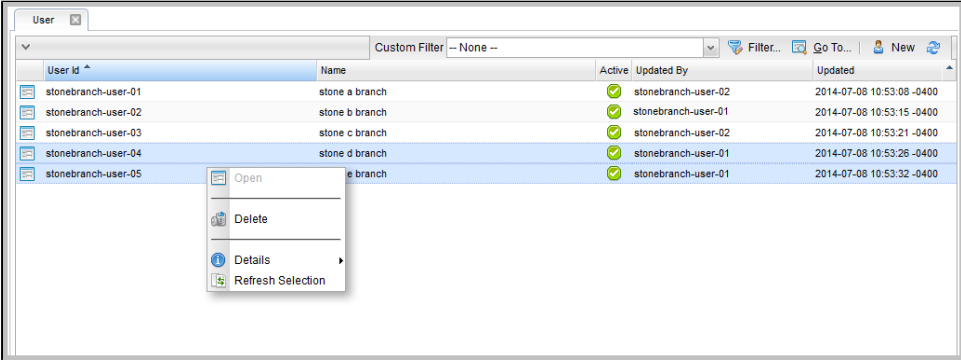
Adding a new record is a simple uniform procedure through the environment: from any list, click the **New** button.

## Deleting Records from a List

To delete one or more records from a list of records:

**Step 1** On the records list, Ctrl+right-click the records that you want to delete. Each selected record is highlighted.

For example:




User Id	Name	Active	Updated By	Updated
stonebranch-user-01	stone a branch	✓	stonebranch-user-02	2014-07-08 10:53:08 -0400
stonebranch-user-02	stone b branch	✓	stonebranch-user-01	2014-07-08 10:53:15 -0400
stonebranch-user-03	stone c branch	✓	stonebranch-user-02	2014-07-08 10:53:21 -0400
stonebranch-user-04	stone d branch	✓	stonebranch-user-01	2014-07-08 10:53:26 -0400
stonebranch-user-05	stone e branch	✓	stonebranch-user-01	2014-07-08 10:53:32 -0400

**Step 2** On the **Action menu** that displayed after you made your first selection, click **Delete**.

**Step 3** On the Confirmation pop-up that displays, click **OK**.

Note

 You also can delete an individual record from its record Details (see [Deleting a Record](#)).

## Updating Multiple Records from a List

You can update multiple records from any of the following lists:

- Agents list for any [Agent type](#) (Credentials field and Member of Business Services field only)
- [All Agents](#) list (Credentials field and Member of Business Services field only)
- Tasks list for any [task type](#)
- [All Tasks](#) list
- Triggers list for any [trigger type](#)
- [All Triggers](#) list
- [Credentials](#) list (all fields except Type and Key Location (FTP only))
- [Email Templates](#) list
- [Global Variables](#) list
- [Scripts](#) list
- [Users](#) (these fields only: Active, Command Line Access, Department, Locked Out, Manager, Password, Password Requires Reset, Time Zone, Web Browser Access, Web Service Access)
- [Virtual Resources](#) list

For detailed information on how to perform a multiple records update, see [Updating Multiple Records](#).

## Uploading Records to a List

You can upload records (as contained in a zip and/or json file) to any of the following lists:

- [Agent Clusters](#) list
- [Bundles](#) list
- [Business Services](#) list
- [Calendars](#) list
- [Connections](#) list ([Database Connections](#), [Email Connections](#), [PeopleSoft Connections](#), and [SAP Connections](#))
- [Credentials](#) list
- [Custom Days](#) list
- [Email Templates](#) list
- [OMS Servers](#) list
- [Promotion Targets](#) list
- [Scripts](#) list
- [SNMP Managers](#) list
- [Tasks](#) list (for any [task type](#))
- [All Tasks](#) list
- [Triggers](#) list (for any [trigger type](#))
- [All Triggers](#) list
- [Variables](#) list
- [Virtual Resources](#) list

For detailed information on how to perform a multiple records upload, see [Uploading Records](#).

## Downloading Multiple Records from a List

You can download multiple records from a list (or download a single record from its record details) from any of the following lists:

- [Agent Clusters](#) list
- [Bundles](#) list
- [Business Services](#) list
- [Calendars](#) list
- [Connections](#) list ([Database Connections](#), [Email Connections](#), [PeopleSoft Connections](#), and [SAP Connections](#))
- [Credentials](#) list
- [Custom Days](#) list
- [Email Templates](#) list
- [OMS Servers](#) list
- [Promotion Targets](#) list
- [Scripts](#) list
- [SNMP Managers](#) list
- [Tasks](#) list (for any [task type](#))
- [All Tasks](#) list
- [Triggers](#) list (for any [trigger type](#))
- [All Triggers](#) list
- [Variables](#) list
- [Virtual Resources](#) list

For detailed information on how to perform a multiple records downloads, see [Download Records](#).

## Performing Actions on One or More Records from a List

You can perform many actions on one or more records on a list without having to open the record(s).

- For a single record, right-click the record on the list to display an [Action menu](#) of all actions available for that record.

- For multiple records, press Ctrl and right-click each record. An [Action menu](#) of all actions available for multiple records of that type displays.

Note



The actions available for a record when selecting an Action menu from a list may not be the same as the actions available when you select an Action menu from its record Details.

## Exporting Records to an Output File

This feature allows you to export record information for records on a list to any of the following file types:

- CSV (comma-separated values in an Excel file)
- Permissions for Group (XML for [User Groups](#) only)
- PDF
- XLS (Excel)
- XLXS
- XML
- XML (Export References)

To export records, you first display the current list of those records.

By default, an export contains all records on the list. If you do not want to export all records on the list, use [filtering](#) to select the records to be exported.

Note



You cannot *select* records on a list manually to indicate which records are to be exported; you must *filter* the list in order to select the records.



It is strongly recommended that you do NOT use the Import and Export functions for modification of Universal Controller records. API functions are available if you need to programmatically update, copy, insert, or otherwise manipulate Universal Controller records.

## Exporting Records to CSV, PDF, XLS (Excel), or XLSX

When you export to CSV, PDF, XLS (Excel), or XLXS, you export only the columns of information displayed on the list. To select which columns are displayed, see [Selecting Columns / Column Locations for a List](#).

To run the export:

<b>Step 1</b>	Display the list of records.
<b>Step 2</b>	Right-click in any column header of the list to display an <a href="#">Action menu</a> .
<b>Step 3</b>	Select <b>Export</b> .
<b>Step 4</b>	Select <b>CSV, PDF, XLS (Excel), or XLXS</b> .
<b>Step 5</b>	When the export is complete, select whether to open or save the file.

## Exporting Records to XML, XML (Export References), or Permissions for Group

When you export to XML, XML (Export References), or Permissions for Group (XML for [User Groups](#) only), you export the entire record.

Note



Exporting records to XML files requires the [ops\\_admin](#) role or the [ops\\_imex](#) role.

To run the export:

<b>Step 1</b>	Display the list of records.																											
<b>Step 2</b>	Right-click in any column header of the list to display an <a href="#">Action menu</a> .																											
<b>Step 3</b>	Select <b>Export</b> .																											
<b>Step 4</b>	<p>Select either:</p> <ul style="list-style-type: none"> <li>• <b>XML</b></li> <li>• <b>XML (Export References)</b></li> <li>• <b>Permissions for Group</b></li> </ul> <p>The following table provides notes on these export types for different record types.</p> <table border="1"> <thead> <tr> <th>Export Type</th> <th>Record Type</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>XML</td> <td>Task</td> <td>Also exported: local variables, Actions, Notes, and Virtual Resource requirements.</td> </tr> <tr> <td>XML</td> <td>Workflow</td> <td>Also exported: all tasks in the workflow. Each task is exported to a separate XML file</td> </tr> <tr> <td>XML (Export References)</td> <td>Task</td> <td>Also exported: all of the XML export data, plus triggers, global variables, calendars, credentials, and any resources referred to. These "reference" records are saved to separate XML file.</td> </tr> <tr> <td>XML</td> <td>Universal Task</td> <td> <ul style="list-style-type: none"> <li>• Export does not include Universal Template XML.</li> <li>• Any unmapped fields (for example: booleanField1, choiceField1) are excluded from the XML.</li> <li>• For any mapped fields, the XML element includes both the Name and Label attributes. For example: <code>&lt;boolean_field1 name="immediate" label="Immediate"&gt;true&lt;/boolean_field1&gt;</code></li> </ul> </td> </tr> <tr> <td>XML (Export References)</td> <td>Universal Task</td> <td> <p>Export includes:</p> <ul style="list-style-type: none"> <li>• Universal Template XML.</li> <li>• Referenced Credentials, Agent Cluster, and Broadcast Cluster.</li> <li>• Referenced Agent only if the <a href="#">Export Agent References</a> Universal Controller system property (opswise.export.agent_references) is set to true.</li> </ul> <p>For any other reference fields that might be inherited from the common Task definition (for example, System Operations), those references also will be followed.</p> </td> </tr> <tr> <td>XML</td> <td>Universal Template</td> <td>Export includes the base Universal Template definition, along with as the Universal Template Field and Universal Template Field Value Maps data, in a single XML per Universal Template.</td> </tr> <tr> <td>XML (Export References)</td> <td>Universal Template</td> <td> <p>Export includes:</p> <ul style="list-style-type: none"> <li>• Referenced Credentials, Agent Cluster, and Broadcast Cluster (under "Defaults" section).</li> <li>• Referenced Agent only if the <a href="#">Export Agent References</a> Universal Controller system property (opswise.export.agent_references) is set to true.</li> </ul> </td> </tr> <tr> <td>XML (Export References)</td> <td>Bundle</td> <td> <p>Export includes:</p> <ul style="list-style-type: none"> <li>• Any Business Services referenced by the Member of Business Services field.</li> <li>• Any Promotion Target referenced by the Default Promotion Target field.</li> </ul> </td> </tr> </tbody> </table>	Export Type	Record Type	Notes	XML	Task	Also exported: local variables, Actions, Notes, and Virtual Resource requirements.	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- Any record added to the Bundle, including those records referenced by any record added to the Bundle.

**Step 5** When the export is complete, an **Exported** message displays above the list, indicating that the export is complete. (The export location is configurable; see the [Export Path](#) Universal Controller system property.)

## Importing Records from a File

You can import record information from any valid XML file to a list using the [Import](#) action that is available for all lists.

- Any Universal Template XML found in the import directory will be processed prior to any other XML.
- Universal Template XML will be processed only if the Universal Template does not exist by **name** or **sys\_id**. You can create a Universal Template via List Import, but you cannot update a Universal Template via List Import; if the Universal Template exists, the Universal Template XML will be ignored.
- Any Universal Task XML must be validated to ensure that it conforms to the currently defined Universal Template it is associated with.

### Note



Importing records from XML files requires either the [ops\\_admin](#) role or the [ops\\_imex](#) role.

Important!



It is strongly recommended that you do NOT use the Import and Export functions for modification of Universal Controller records. API functions are available if you need to programmatically update, copy, insert, or otherwise manipulate Universal Controller records.



# Action Menus

- [Overview](#)
- [Accessing Action Menus](#)
- [Actions](#)

## Overview

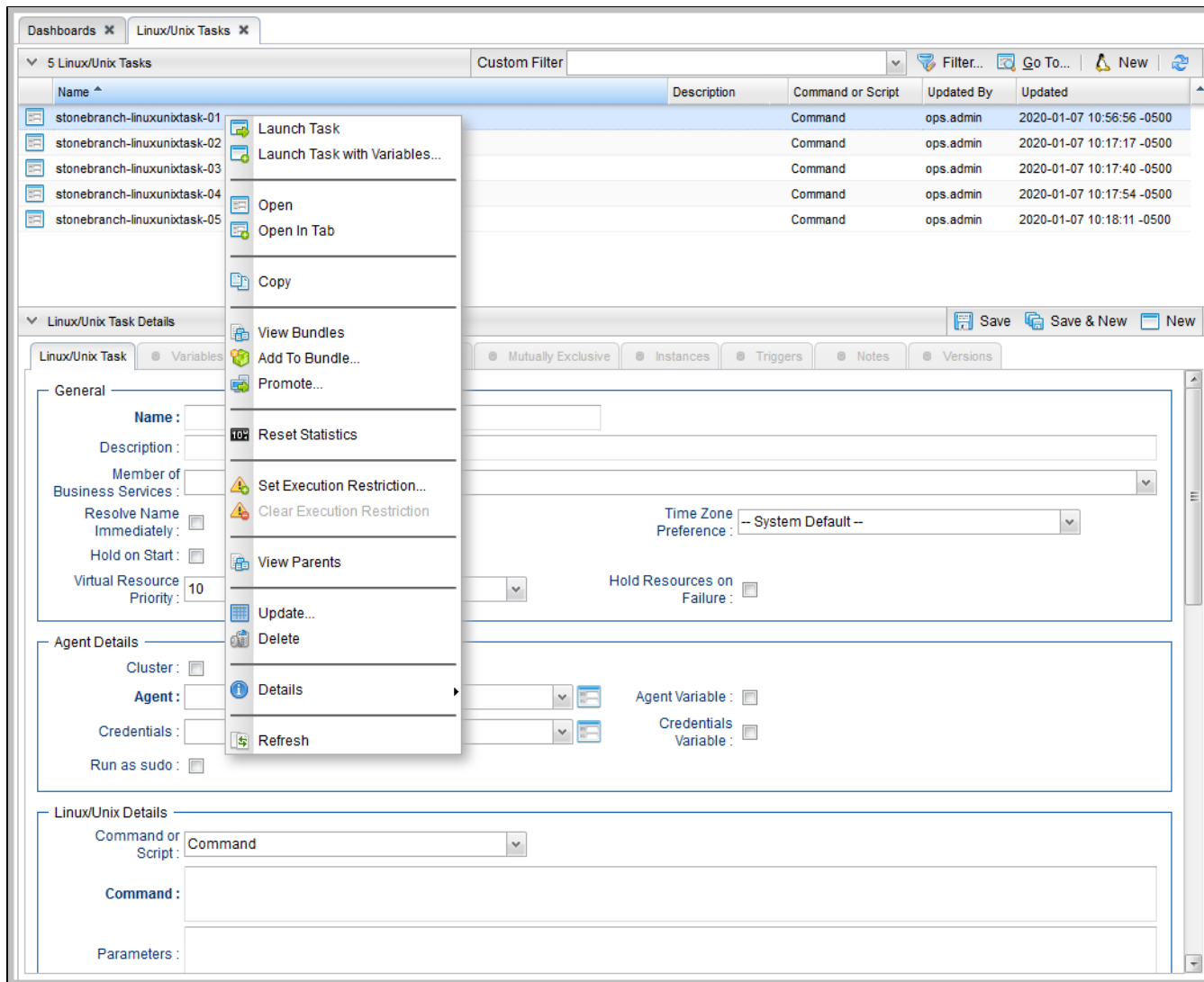
Action menus contain a set of actions and commands that you can apply to a [list](#) of records or one or more individual [records](#). The actions listed on an Action menu are context-sensitive; they appear only as appropriate for the type of list or record (and as allowed by your [User Permissions](#)).

## Accessing Action Menus

To access an Action menu:

<b>For a List</b>	Right-click a column header to display an Action menu containing a set of actions that you can apply to that column or to the entire list.
<b>For a Record</b>	<p>Either:</p> <ul style="list-style-type: none"> <li>• Right-click a record on a list.</li> <li>• Right-click anywhere in the record Details.</li> </ul> <p>The list of actions on an Action menu for a record may differ depending on whether you accessed the menu from the records list or from the record Details.</p>

The following is a sample Action menu for an individual record selected on a list:



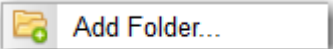
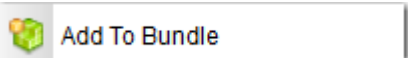

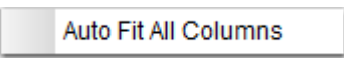

## Actions

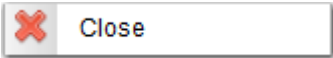
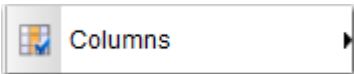







The following table identifies actions that can appear on Action menus throughout the Universal Controller user interface. The Availability column identifies the location(s) from where each action is available.

Most actions are available for multiple, if not all, record types. Some actions are available for specific record types; these actions are categorized alphabetically following the list of actions for multiple record types:

- [Multiple Record Types](#)
- [Agents and Agent Clusters](#)

- Applications
- Bundles and Promotion
- Calendars and Custom Days
- Dashboards
- Data Backup/Purge
- Manual Task Instances
- Reports
- SAP Task Instances
- Task Instances
- Task Monitor Task Instances
- Tasks
- Triggers
- Universal Templates
- Users and Groups
- Virtual Resources
- Workflow Task Instances
- Workflow Tasks
- z/OS Task Instances
- z/OS Tasks

Action	Availability	Description
<b>Multiple Record Types</b>		
	<ul style="list-style-type: none"> <li>• Automation Center Navigation pane</li> </ul>	Adds a new folder to the <a href="#">Automation Center navigation pane</a> via the Navigation Tree Configuration.
	<p>For any type of record that can be added to a Bundle:</p> <ul style="list-style-type: none"> <li>• Record on any list</li> <li>• Record Details</li> </ul>	<p>Adds this record to any existing <a href="#">Bundle</a>.</p> <p>This action is enabled only if a user has the ops_bundle_admin role or at least one Bundle Update permission assignment.</p> <ul style="list-style-type: none"> <li>• For a user with the ops_bundle_admin role, the Add To Bundle dialog allows selection of any pre-existing Bundle.</li> <li>• For a user without the ops_bundle_admin role but at least one Bundle Update permission assignment, the Add To Bundle dialog allows selection of pre-existing Bundles for which the user has Read permission.</li> </ul> <p>Only users with the ops_bundle_admin role or Update permission for the bundle can add definitions to the Bundle.</p>
	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Left-adjusts all columns in the list to their smallest size that still displays the full column name and column details for all records in the list.
	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Adjusts all Auto Fitted columns back to their original size.
	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Clears the temporary sort levels that you created via the <a href="#">Configure Sort</a> action.

	<ul style="list-style-type: none"> <li>Record Details pop-up</li> </ul>	<p>Closes the Details pop-up of any record.</p>
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p>Displays a list of all available columns that can be displayed for this list. Click any column in the list to display / remove it.</p>
	<ul style="list-style-type: none"> <li>Automation Center Navigation pane</li> </ul>	<p>Displays the Navigation Tree Configuration dialog, which allows you to configure the <a href="#">Automation Center navigation pane</a>.</p>
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p>Sorts a list according to temporary, user-defined sort levels for a column on the list (see <a href="#">Configure a Multi-Level Sort</a>).</p>
	<ul style="list-style-type: none"> <li>Record on any list</li> <li>Record Details</li> </ul>	<p>Creates a copy of the selected record, which you are prompted to rename.</p>
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p>Exports records on a list in CSV (comma-separated values in an Excel file) format (see <a href="#">Exporting Records to an Output File</a>).</p>
	<ul style="list-style-type: none"> <li>Record on any list</li> <li>Record Details</li> </ul>	<p>Displays a menu of the following actions:</p> <ul style="list-style-type: none"> <li><a href="#">Show/Hide Metadata</a></li> <li><a href="#">Show Details</a></li> <li><a href="#">Show Variables</a></li> <li><a href="#">Print</a></li> </ul>
	<ul style="list-style-type: none"> <li>Record on any list</li> <li>Record Details</li> </ul>	<p>Deletes the selected record(s).</p>
	<ul style="list-style-type: none"> <li>Records on any of these lists:             <ul style="list-style-type: none"> <li>Agent Cluster</li> </ul> </li> </ul>	<p><a href="#">Downloads</a> the selected record(s) to a zip file on your local file system.</p>

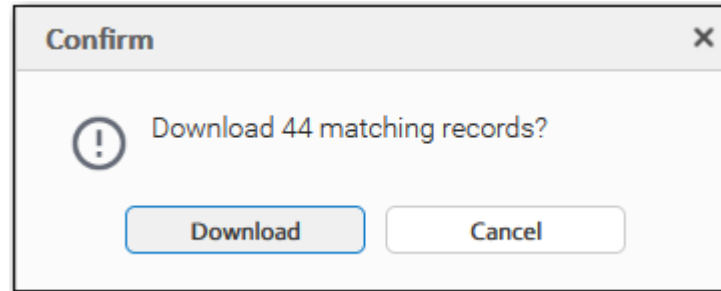
- s  
list
- Bundles list
- Business Services
- Calendars
- Connections lists (Database, Email, PeopleSoft, SAP)
- Credentials list
- Custom Days
- Email Templates list
- OMS Servers list
- Promotion Targets
- Scripts list

- SNMP Managers list
- Task lists
- Triggers lists
- Variables list
- Virtual Resources list
- Record Details of these record types


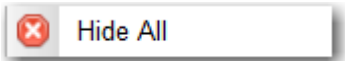
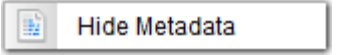
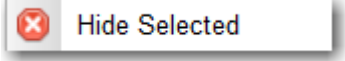



Download Filtered










- Records on any of these lists:
  - Agent Clusters list
  - Bundles list
  - Buses Services
  - Calendars
  - Connections lists (Database)

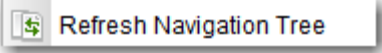

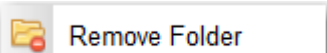
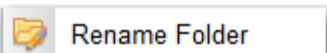
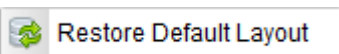

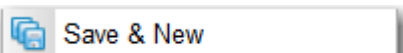
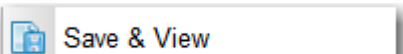

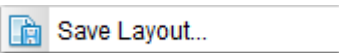
[Downloads](#) all records in the list that match the current filter to a zip file on your local file system.

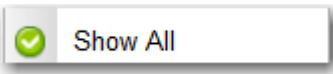
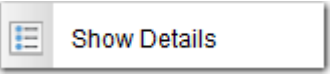
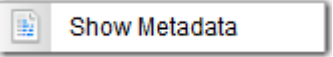
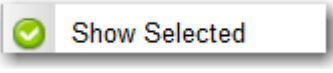
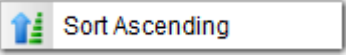
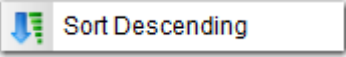





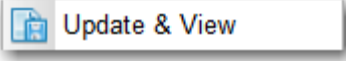
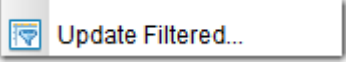
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	ces list	
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	Exports records on a list in either of seven formats (as available for the type of record in the list): <ul style="list-style-type: none"> <li>CSV</li> <li>Permissions For Group</li> <li>PDF</li> <li>XLS (Excel)</li> <li>XLSX</li> <li>XML</li> <li>XML (Export References)</li> </ul>
	<ul style="list-style-type: none"> <li>Automation Center Navigation pane</li> </ul>	Hides all folders and items in the <a href="#">Automation Center navigation pane</a> as selected via the Navigation Tree Configuration.
	<ul style="list-style-type: none"> <li>All record Details</li> </ul>	Hide <a href="#">Metadata</a> for these Details.
	<ul style="list-style-type: none"> <li>Automation Center Navigation pane</li> </ul>	Hides folders and items in the <a href="#">Automation Center navigation pane</a> that have been selected to be hidden via the Navigation Tree Configuration.
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	Imports valid XML files (usually from an <a href="#">Export</a> ) from a user-defined location to a list. Import performs a pre-validation on the XML files; if any files are found to be invalid, a warning displays on the <a href="#">Console</a> and the import operation is aborted. Any invalid XML files should be fixed or removed from that location.
	<ul style="list-style-type: none"> <li>All record Details (except task instances, Agents, cluster nodes)</li> </ul>	Creates a copy of the current record, for which which you have just entered a new Name.
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	Displays a menu of available <a href="#">layouts</a> for this list.
		Displays empty Details for you to begin creating a new record.

 New	<ul style="list-style-type: none"> <li>Any Details</li> </ul>	
 Open	<ul style="list-style-type: none"> <li>Any record on list</li> </ul>	<p>Opens the Details pop-up of a record.</p>
 Open	<ul style="list-style-type: none"> <li>Navigator</li> </ul>	<p>Opens a page right-clicked in the Navigator under the current tab. (If the current tab is for the <a href="#">Activity Monitor</a> or <a href="#">Dashboard Data</a> the page will open in a new tab (see <a href="#">Tabs</a>).</p>
 Open In New Tab	<ul style="list-style-type: none"> <li>Navigator</li> </ul>	<p>Opens a page right-clicked in the Navigator under a new tab.</p>
 Open In Tab	<ul style="list-style-type: none"> <li>Record in list</li> <li>Record Details</li> </ul>	<p>Displays the record Details under a new tab rather than as a pop-up (see <a href="#">Opening a Record</a>).</p>
 PDF	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p>Exports the displayed data (the selected columns) of every record on a list into PDF format (see <a href="#">Exporting Records to an Output</a>).</p>
 Print	<ul style="list-style-type: none"> <li>Record in list</li> <li>Record Details</li> </ul>	<p>Prints the record Details as shown in the user interface.</p>
 Promote	<p>For any type of record that can be promoted:</p> <ul style="list-style-type: none"> <li>Record on any list</li> <li>Record Details</li> </ul>	<p>Copies this <a href="#">record</a> from this source cluster node to a target cluster node.</p> <p>The Promote... action is disabled unless a user has the ops_promotion_admin role or if the <a href="#">Bundleless Promotion With Execute Permission Permitted</a> Universal Controller system property is true and the user has at least one promotion target Execute permission assignment.</p> <ul style="list-style-type: none"> <li>For a user with the ops_promotion_admin role, the Promote... dialog allows selection of any pre-existing promotion target.</li> <li>For a user without the ops_promotion_admin role, the Promote... dialog allows selection of pre-existing promotion targets for which the user has Read permission.</li> </ul> <p>The server will prohibit the user from promoting the definition using the promotion target if neither of the two conditions are met:</p> <ul style="list-style-type: none"> <li>The user has the ops_promotion_admin role.</li> <li>The user has Execute permission for the selected promotion target and the <a href="#">Bundleless Promotion With Execute Permission Permitted</a> Universal Controller system property is true.</li> </ul>
 Refresh	<ul style="list-style-type: none"> <li>Record Details</li> </ul>	<p>Refreshes all dynamic information in the Details.</p>

	<ul style="list-style-type: none"> <li>• Navigator (All navigation panes)</li> </ul>	<p>Reloads the navigation Tree in the navigation pane.</p> <p>In the <a href="#">Automation Center navigation pane</a>, any new Universal Task types that were created since user login, as well as any modifications made to the System Default Navigation pane by an Administrator, will be displayed.</p>
	<ul style="list-style-type: none"> <li>• Records on Lists</li> </ul>	<p>Refreshes all dynamic information in the record Details.</p>
	<ul style="list-style-type: none"> <li>• Automation Center Navigation pane</li> </ul>	<p>Removes an added folder from the <a href="#">Automation Center navigation pane</a> via the Navigation Tree Configuration.</p>
	<ul style="list-style-type: none"> <li>• Automation Center Navigation pane</li> </ul>	<p>Renames an added folder in the <a href="#">Automation Center navigation pane</a> via the Navigation Tree Configuration.</p>
	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	<p>Restores the current layout of the list to its default layout.</p>
	<ul style="list-style-type: none"> <li>• New, unsaved record</li> </ul>	<p>Saves this record and, if the record is displayed in a pop-up dialog, closes the record.</p> <p>(Same action as <b>Save</b> button on Details.)</p>
	<ul style="list-style-type: none"> <li>• New, unsaved record</li> </ul>	<p>Saves this record and displays empty Details for a new record.</p> <p>(Same action as <b>Save &amp; New</b> button on Details.)</p>
	<ul style="list-style-type: none"> <li>• New, unsaved record (pop-up dialog only)</li> </ul>	<p>Saves this record and continues to display the record.</p> <p>(Same action as <b>Save &amp; View</b> button on Details.)</p>
	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	<p>Saves the current layout of the list as the default layout.</p>
	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	<p>Saves the current layout of the list.</p>

	<ul style="list-style-type: none"> <li>Automation Center Navigation pane</li> </ul>	<p>Shows all folders and items in the <a href="#">Automation Center navigation pane</a> as selected via the Navigation Tree Configuration.</p>
	<ul style="list-style-type: none"> <li>Record on any list</li> <li>All record Details.</li> </ul>	<p>Displays all <a href="#">details</a> stored in the database for this record in table format.</p>
	<ul style="list-style-type: none"> <li>All record Details</li> </ul>	<p>Display <a href="#">Metadata</a> for these Details.</p>
	<ul style="list-style-type: none"> <li>Automation Center Navigation pane</li> </ul>	<p>Shows folders and items in the <a href="#">Automation Center navigation pane</a> that have been selected to be shown via the Navigation Tree Configuration.</p>
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p><a href="#">Sorts the list</a> in ascending alphabetical order.</p>
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p><a href="#">Sorts the list</a> in descending alphabetical order.</p>
	<ul style="list-style-type: none"> <li>Lists</li> </ul>	<p>Selects the default layout for the list.</p>
	<ul style="list-style-type: none"> <li>Email, Database, SAP, and PeopleSoft Connections lists</li> </ul>	<p>Performs a connectivity test to the selected <a href="#">connection</a>. (Same action as <b>Test Connection</b> button on Details.)</p>
	<ul style="list-style-type: none"> <li>Record Details</li> </ul>	<p>Updates the Details of any record and, if the Details are displayed in a pop-up dialog, closes the pop-up. (Same action as <b>Update</b> button on Details.)</p>

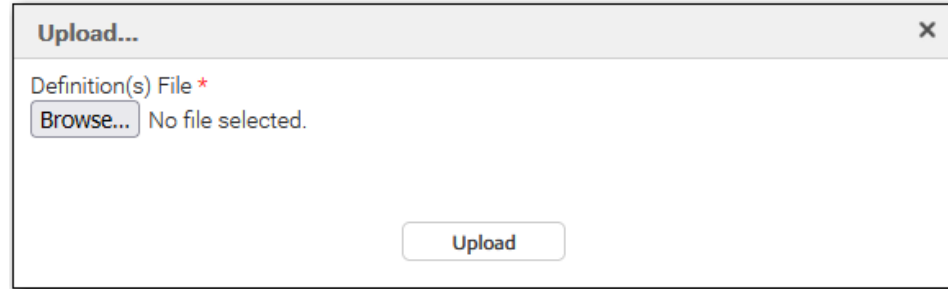
	(except Cluster Nodes)	
	<ul style="list-style-type: none"> <li>Record Details pop-up (except Cluster Nodes)</li> </ul>	<p>Updates the Details of any record and continues to display the record.</p>
	<ul style="list-style-type: none"> <li>Agents lists</li> <li>Connections lists (Database, Email, PeopleSoft, SAP)</li> <li>Credentials list</li> <li>Email Templates list</li> <li>SNMP Managers list</li> <li>Tasks lists</li> <li>Triggers lists</li> <li>Users list</li> <li>Variables list</li> <li>Virtual Resources list</li> </ul>	<p><a href="#">Updates</a> all currently selected records in the list.</p>
	<ul style="list-style-type: none"> <li>Agents lists</li> <li>Connections lists (Database, Email, PeopleSoft, SAP)</li> <li>Credentials list</li> </ul>	<p><a href="#">Updates</a> all records in the list that match the current filter.</p>

- Email Templates list
- SNMP Managers list
- Tasks lists
- Triggers lists
- Users list
- Variables list
- Virtual Resources list

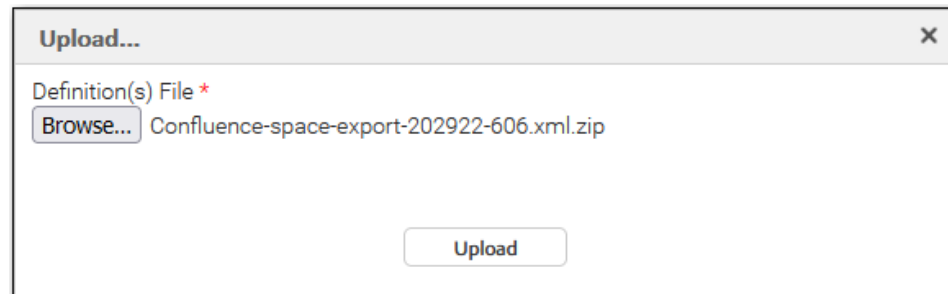
Upload...

- Agent Clusters list
- Bundles list
- Business Services
- Calendars
- Connections lists (Database, Email, PeopleSoft, SAP)
- Credentials list
- Custom Days
- Email Templates list
- OMS Servers list
- Promotion Targets
- Scripts list
- SNMP Managers list
- Tasks lists
- Triggers lists









Uploads all selected files.


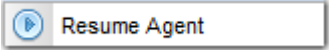
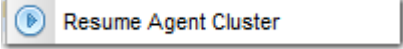


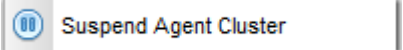


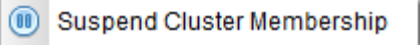



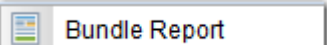
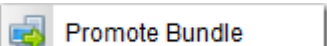
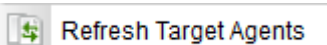
Click Browse to select the file(s) that you want to upload.

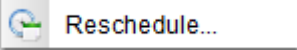
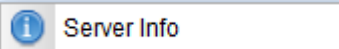
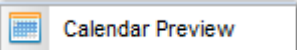
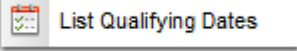
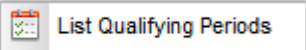


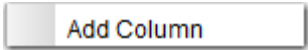

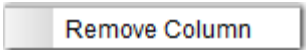
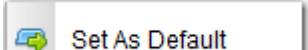



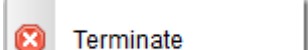
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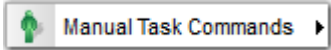


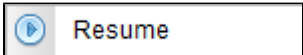
	<ul style="list-style-type: none"> <li>• Variable s list</li> <li>• Virtual Resources list</li> </ul>	
 View	<ul style="list-style-type: none"> <li>• Entries on Edit Members dialogs</li> </ul>	Displays detailed information about that entry.
 View Bundles	<p>For any type of record that can be added to a Bundle:</p> <ul style="list-style-type: none"> <li>• Record on any list</li> <li>• Record Details</li> </ul>	<p>Displays a list of <a href="#">bundles</a> to which this record belongs.</p> <p>This action is enabled only if a user has the ops_bundle_admin or ops_promotion_admin role, or at least one <a href="#">Bundle Read permission</a> assignment.</p> <ul style="list-style-type: none"> <li>• For a user with the ops_bundle_admin or ops_promotion_admin role, the View Bundles list displays every Bundle containing the definition.</li> <li>• For a user with neither the ops_bundle_admin or ops_promotion_admin role, the View Bundles list displays every Bundle, for which the user has Read permission, containing the definition.</li> </ul>
 XLS (Excel)	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Exports the displayed data (the selected columns) of every record on a list into XLS (Excel) format (see <a href="#">Exporting Records to an Output File</a> ).
 XLSX	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Exports the displayed data (the selected columns) of every record on a list into XLSX format (see <a href="#">Exporting Records to an Output File</a> ).
 XML	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Exports all data of every record on a list into XML format (see <a href="#">Exporting Records to an Output File</a> ).
 XML (Export References)	<ul style="list-style-type: none"> <li>• Lists</li> </ul>	Exports all data, plus references, of every record on a list into XML format (see <a href="#">Exporting Records to an Output File</a> ).
<b>Agents and Agent Clusters</b>		
 Reset Agent Task Count	<ul style="list-style-type: none"> <li>• Agents list</li> <li>• Agent Details</li> </ul>	<a href="#">Resets the Current Task Count</a> field for this Agent to 0.
 Reset Agent Cluster Task Count	<ul style="list-style-type: none"> <li>• Agent Clusters list</li> <li>• Agent Cluster Details</li> </ul>	<a href="#">Resets the Current Task Count</a> field for this Agent Cluster to 0.





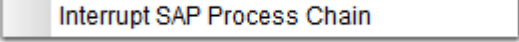
	<ul style="list-style-type: none"> <li>• Agent Cluster on Agent Clusters list</li> <li>• Agent Cluster Details</li> </ul>	<p>If Distribution type for an Agent Cluster is Network Alias; Resolves the Network Alias for this Agent Cluster.</p>
	<ul style="list-style-type: none"> <li>• Agent on Agents list</li> <li>• Agent Details</li> </ul>	<p>Resumes the ability to run tasks for <a href="#">suspended Agent</a>. (Same action as <b>Resume Agent</b> button on Agent Details.)</p>
	<ul style="list-style-type: none"> <li>• Agent Cluster on Agent Clusters list</li> <li>• Agent Cluster Details</li> </ul>	<p>Resumes the ability to run tasks for a <a href="#">suspended cluster of Agents</a>. (Same action as Resume Cluster button on Agent Cluster Details.)</p>
	<ul style="list-style-type: none"> <li>• Agents in Cluster list</li> </ul>	<p><a href="#">Resumes</a> the membership of this Agent in the selected Agent Cluster.</p>
	<ul style="list-style-type: none"> <li>• Agent on Agents list</li> <li>• Agent Details</li> </ul>	<p><a href="#">Suspends</a> the ability to run tasks for this Agent. (Same action as <b>Suspend Agent</b> button on Agent Details.)</p>
	<ul style="list-style-type: none"> <li>• Agent Cluster on Agent Clusters list</li> </ul>	<p><a href="#">Suspends</a> the ability to run tasks for this cluster of Agents. (Same action as <b>Suspend Cluster</b> button on Agent Cluster Details.)</p>

	<ul style="list-style-type: none"> <li>• Agent Cluster Details</li> </ul>	
	<ul style="list-style-type: none"> <li>• Agents in Cluster list</li> </ul>	<p><a href="#">Suspends</a> the membership of this Agent in the selected agent cluster.</p>
<b>Applications</b>		
	<ul style="list-style-type: none"> <li>• Application on Applications list</li> </ul>	<p>Queries the application (if it is running).</p>
	<ul style="list-style-type: none"> <li>• Application on Applications list</li> </ul>	<p>Starts the application.</p>
	<ul style="list-style-type: none"> <li>• Application on Applications list</li> </ul>	<p>Stops the application.</p>
<b>Bundles and Promotion</b>		
	<ul style="list-style-type: none"> <li>• Bundle on Bundles list</li> </ul>	<p>Displays a Bundle Report for this bundle. (Same action as the <b>Bundle Report</b> button in Bundle Details.)</p>
	<ul style="list-style-type: none"> <li>• Bundle on Bundles list</li> </ul>	<p><a href="#">Copies this bundle</a> from this source cluster node to a target cluster node. (Same action as <b>Promote Bundle</b> button on Bundle Details.)</p>
	<ul style="list-style-type: none"> <li>• Promotion Targets list</li> </ul>	<p>Refreshes any Agents on the promotion target server selected in this record.</p>

	<ul style="list-style-type: none"> <li>Promotion Targets Details</li> </ul>	
	<ul style="list-style-type: none"> <li>Promotion Schedule on Promotion Schedule list</li> <li>Promotion Schedule Details</li> </ul>	<p>Reschedules a <a href="#">scheduled promotion</a>.</p> <p>(Same action as <b>Reschedule...</b> button in Promotion Schedule Details.)</p>
	<ul style="list-style-type: none"> <li>Promotion Targets list</li> <li>Promotion Targets Details</li> </ul>	<p>Displays a Remote Server Information pop-up that lists details about the Automation Center cluster node selected as the promotion target in this record.</p>
<b>Calendars and Custom Days</b>		
	<ul style="list-style-type: none"> <li>Calendar on Calendars list</li> <li>Calendar Details</li> </ul>	<p>Provides a month-by-month display of all <a href="#">Custom Days</a> defined for this calendar.</p>
	<ul style="list-style-type: none"> <li>Custom Day Details</li> </ul>	<p>Displays a table of the next 30 dates that match this Custom Day details.</p> <p>(Same action as <b>List Qualifying Dates</b> button.)</p>
	<ul style="list-style-type: none"> <li>Custom Day Details</li> </ul>	<p>Displays a table of the next 30 periods that match this Custom Day details.</p> <p>(Same action as <b>List Qualifying Periods</b> button.)</p>
<b>Dashboards</b>		
		<p>Adds a column to the currently displayed Dashboard.</p>

	<ul style="list-style-type: none"> <li>• Dashboard</li> </ul>	
	<ul style="list-style-type: none"> <li>• Dashboards</li> </ul>	Displays the <b>Column Properties</b> drop-down list, which allows you to add and removed columns on the currently displayed Dashboard, and the <b>Show Widget Picker</b> button, which allows you to add Widgets to the currently displayed Dashboard.
	<ul style="list-style-type: none"> <li>• Dashboard</li> </ul>	Removes the selected column from the currently displayed Dashboard.
	<ul style="list-style-type: none"> <li>• Dashboards</li> </ul>	Selects the currently displayed Dashboard as the Dashboard that will display by default for the current session.
<b>Data Backup/Purge</b>		
	<ul style="list-style-type: none"> <li>• Data Backup/Purge record on Data Backup/Purge list</li> </ul>	Disables this <i>scheduled</i> <a href="#">data backup/purge</a> .  (Same action as <b>Disable</b> button on Details.)
	<ul style="list-style-type: none"> <li>• Data Backup/Purge record on Data Backup/Purge list</li> </ul>	Enables this <i>scheduled</i> <a href="#">data backup/purge</a> .  (Same action as <b>Enable</b> button in Details.)
	<ul style="list-style-type: none"> <li>• Data Backup/Purge list</li> </ul>	Run the selected backup or purge.  (Same action as <b>Run</b> button in Details.)
	<ul style="list-style-type: none"> <li>• Data Backup/Purge record on Data Backup/Purge list</li> </ul>	Terminates this <i>scheduled</i> <a href="#">data backup/purge</a> .  (Same action as <b>Terminate</b> button in Details.)


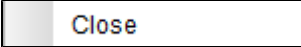
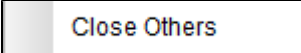
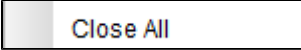




<b>Manual Task Instances</b>		
	<ul style="list-style-type: none"> <li>Manual task instance on Activity Monitor / Task Instance s list</li> <li>Manual task instance Details</li> </ul>	<p>Displays a menu of commands specific to Manual task instances:</p> <ul style="list-style-type: none"> <li><a href="#">Set Completed</a></li> <li><a href="#">Set Started</a></li> </ul>
	<ul style="list-style-type: none"> <li>Manual task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Sets this task instance to <a href="#">Success</a> status.</p>
	<ul style="list-style-type: none"> <li>Manual task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Resets the Started Time of this task instance.</p>
<b>OMS Servers</b>		
	<ul style="list-style-type: none"> <li>OMS Server on OMS Servers list</li> <li>OMS Server Details</li> </ul>	<p>Resumes the connection of a suspended <a href="#">OMS Server</a>.</p> <p>(Same action as <b>Resume</b> button on OMS Server Details.)</p>



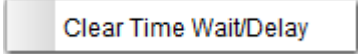



 Suspend	<ul style="list-style-type: none"> <li>• OMS Server on OMS Servers list</li> <li>• OMS Server Details</li> </ul>	<p>Temporarily disconnects the <a href="#">OMS Server</a>.</p> <p>(Same action as <b>Suspend</b> button on OMS Server Details.)</p>
<b>Reports</b>		
 Run	<ul style="list-style-type: none"> <li>• Reports list</li> <li>• Reports Details</li> </ul>	<p>Run the selected report.</p> <p>(Same action as <b>Run</b> button in Details.)</p>
<b>SAP Task Instances</b>		
 SAP Task Commands	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	<p>Displays a menu of commands specific to SAP task instances:</p> <ul style="list-style-type: none"> <li>• <a href="#">Abort SAP Job</a></li> <li>• <a href="#">Interrupt SAP Process Chain</a></li> <li>• <a href="#">Purge SAP Job</a></li> <li>• <a href="#">Restart SAP Process Chain</a></li> <li>• <a href="#">Retrieve SAP Job Definition</a></li> <li>• <a href="#">Retrieve SAP Job Log</a></li> <li>• <a href="#">Retrieve SAP Job Status</a></li> <li>• <a href="#">Retrieve SAP Process Chain - Instance</a></li> <li>• <a href="#">Retrieve SAP Process Chain - Planned</a></li> <li>• <a href="#">Retrieve SAP Process Chain Log</a></li> <li>• <a href="#">Retrieve SAP Process Chain Status</a></li> <li>• <a href="#">Retrieve SAP Spool List</a></li> </ul>
 Abort SAP Job	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	<p>Aborts the SAP job specified in the task instance.</p>
 Interrupt SAP Process Chain	<ul style="list-style-type: none"> <li>• SAP task</li> </ul>	<p>Interrupts the SAP Process Chain.</p>

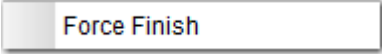
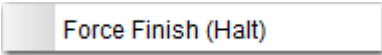




	<p>instance on Activity Monitor / Task Instance s list</p> <ul style="list-style-type: none"> <li>• SAP task instance Details</li> </ul>	
<p>Purge SAP Job</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	<p>Purges the SAP job specified in the task instance.</p>
<p>Restart SAP Process Chain</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	<p>Restarts the SAP Process Chain.</p>
<p>Retrieve SAP Job Definition</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	<p>Retrieves the SAP job definition.</p>



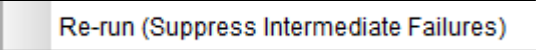

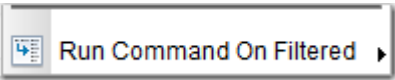
<p>Retrieve SAP Job Log</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instances list</li> <li>• SAP task instance Details</li> </ul>	<p>Retrieves the SAP job log.</p>
<p>Retrieve SAP Job Status</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instances list</li> <li>• SAP task instance Details</li> </ul>	<p>Retrieves the SAP job status.</p>
<p>Retrieve SAP Process Chain - Instance</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instances list</li> <li>• SAP task instance Details</li> </ul>	<p>Retrieves the specific run information for the SAP Process Chain.</p>
<p>Retrieve SAP Process Chain - Planned</p>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instances list</li> </ul>	<p>Retrieves the "blueprint" information for the SAP Process Chain.</p>

	<ul style="list-style-type: none"> <li>• SAP task instance Details</li> </ul>	
<div style="border: 1px solid black; padding: 2px; width: fit-content;">Retrieve SAP Process Chain Log</div>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	Retrieves SAP Process Chain log.
<div style="border: 1px solid black; padding: 2px; width: fit-content;">Retrieve SAP Process Chain Status</div>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	Retrieves SAP Process Chain status.
<div style="border: 1px solid black; padding: 2px; width: fit-content;">Retrieve SAP Spool List</div>	<ul style="list-style-type: none"> <li>• SAP task instance on Activity Monitor / Task Instance s list</li> <li>• SAP task instance Details</li> </ul>	Retrieves SAP spool list.
<b>Tabs</b>		
<div style="border: 1px solid black; padding: 2px; width: fit-content;">Pin</div>	<ul style="list-style-type: none"> <li>• All tabs except</li> </ul>	Pins the tab to the task bar.

	non-replaceable tabs.	
	<ul style="list-style-type: none"> <li>All tabs except non-replaceable tabs.</li> </ul>	Automatically pins the tab to the task bar upon login.
	<ul style="list-style-type: none"> <li>All tabs.</li> </ul>	Close this tab from the task bar.
	<ul style="list-style-type: none"> <li>All tabs.</li> </ul>	Close all other tabs except this tab.
	<ul style="list-style-type: none"> <li>All tabs.</li> </ul>	Close all tabs including this tab.
<b>Task Instances</b>		
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor / Task Instances list</li> </ul>	<p>Cancels this task instance.</p> <p><b>Note</b>   Cancelling a Web Service task instance with Protocol = SOAP is prohibited.</p> <p>Cancelling a PeopleSoft task instance cancels the PeopleSoft process itself, not the PeopleSoft task process. Once the Peoplesoft process has been cancelled, its status will filter through to the PeopleSoft task.</p>
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor / Task Instances list</li> <li>Task Instance Details</li> </ul>	<p>Displays a menu of the following actions:</p> <ul style="list-style-type: none"> <li><a href="#">Clear All Dependencies</a></li> <li><a href="#">Clear Exclusive</a></li> <li><a href="#">Clear Resources</a></li> <li><a href="#">Clear Time Wait/Delay</a></li> </ul>
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor</li> </ul>	Clears all dependencies (predecessors, resources, and exclusive) to allow the task instance to run.

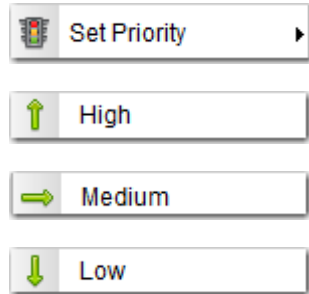
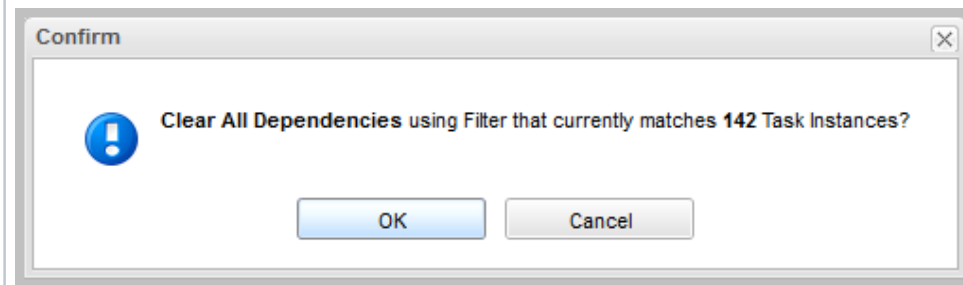
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Clears mutually exclusive dependencies of this task instance.</p>
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Clears resource dependencies of this task instance.</p>
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task Instance s list</li> <li>• Task instance Details</li> </ul>	<p>Clears all Wait To Start and Delay On Start specifications for this task instance.</p>
	<ul style="list-style-type: none"> <li>• Task Instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Deletes the selected task instance if it is in any of the following statuses:</p> <ul style="list-style-type: none"> <li>• In Doubt (110)</li> <li>• Failed to Start (120)</li> <li>• Confirmation Required (125)</li> <li>• Cancelled (130)</li> <li>• Failed (140)</li> <li>• Skipped (180)</li> <li>• Finished (190)</li> <li>• Success (200)</li> </ul> <p>Note:   You cannot delete a task instance in any of these statuses if it was within a workflow task instance that itself has not been delete.</p>
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task</li> </ul>	<p>Displays a menu of the following actions:</p> <ul style="list-style-type: none"> <li>• <a href="#">Force Finish</a></li> <li>• <a href="#">Force Finish (Halt)</a></li> <li>• <a href="#">Force Finish/Cancel</a></li> <li>• <a href="#">Force Finish/Cancel (Halt)</a></li> </ul>

	Instance s list	
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor / Task Instance s list</li> </ul>	Places this task into the <a href="#">Finished</a> status.
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor</li> </ul>	Places this task into the <a href="#">Finished</a> status without aborting monitoring processes.
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor / Task Instance s list</li> </ul>	Cancels this task and places it into the <a href="#">Finished</a> status.
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor</li> </ul>	Cancels this task and places it into the <a href="#">Finished</a> status without aborting monitoring processes.
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor / Task Instance s list</li> </ul>	Places this task instance in the <a href="#">Held</a> status
	<ul style="list-style-type: none"> <li>Task instance on Activity Monitor / Task</li> </ul>	Releases this task instance from <a href="#">Held</a> status.

	<p>Instance s list</p>	
	<ul style="list-style-type: none"> <li>Task instance (except Workflows) on Activity Monitor / Task Instance s list</li> </ul>	<p>Displays a menu of the following actions:</p> <ul style="list-style-type: none"> <li>Re-run</li> <li>Re-run (Suppress Intermediate Failures)</li> </ul> <p>This menu is disabled if the task instance does not qualify for re-run.</p>
	<ul style="list-style-type: none"> <li>Task instance (except Workflows) on Activity Monitor / Task Instance s list</li> </ul>	<p>Re-runs this completed task.</p> <p>For tasks not completed but scheduled for automatic retry, it re-runs the task and counts the re-run as one of the automatic retrie</p>
	<ul style="list-style-type: none"> <li>Task instance (except Workflows) on Activity Monitor / Task Instance s list</li> </ul>	<p>Re-runs a task instance specifying that intermediate failures be suppressed. (See <a href="#">Re-run (Suppress Intermediate Failures) Permitted</a> Universal Controller system property.)</p> <p>If the task instance qualifies for re-run, but it already has Retry Options enabled, the Re-run (Suppress Intermediate Failures) command will display as disabled in the menu.</p>
	<ul style="list-style-type: none"> <li>Task instance in list</li> <li>Task Instance Details</li> </ul>	<p>Retrieves standard out and/or standard error output for the following running or completed task instances: FTP File Monitor, Linux/Unix, SAP, Universal Command, Windows, z/OS.</p>
	<ul style="list-style-type: none"> <li>Activity Monitor</li> <li>Task Instance s List</li> </ul>	<p>Executes a selected command against all task instances that match the current filter.</p> <ul style="list-style-type: none"> <li>Clear             <ul style="list-style-type: none"> <li>Clear All Dependencies</li> <li>Clear Exclusive</li> <li>Clear Resources</li> <li>Clear Time Wait Delay</li> </ul> </li> </ul>

- Force Finish
  - Force Finish
  - Force Finish (Halt)
  - Force Finish/Cancel
  - Force Finish/Cancel (Halt)
- Cancel
- Hold
- Release
- Skip Path
- Skip
- Unskip
- Rerun
- Set Priority (High, Medium, Low)
- Delete

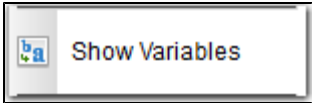

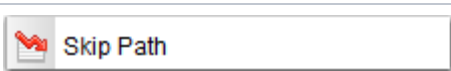

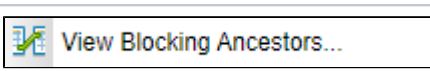
Before the selected command is executed, a confirmation pop-up displays. For example:


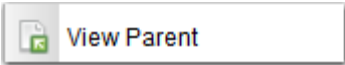
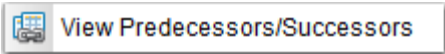


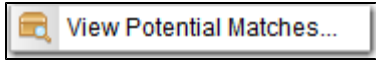
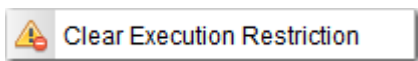
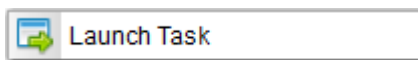
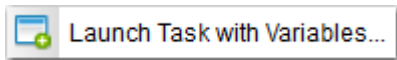

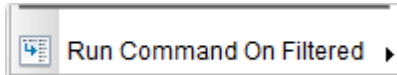
- Linux /Unix, Universal, Windows, and z/OS Task instance on Activity Monitor / Task Instance lists
- Linux /Unix, Universal, Windows, and z/OS Task instance Details

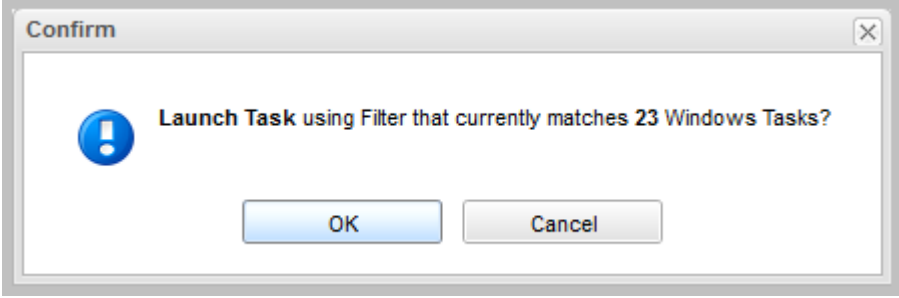

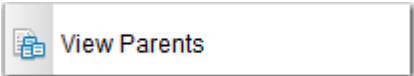
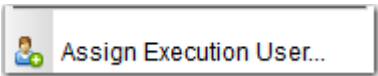


Displays a menu of run [priorities](#) that you can set for this task instance:




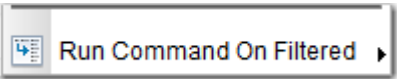

- **High** = Sets the run priority to High so that it will run before task instances in Low and Medium priorities.
- **Medium** = Sets the run priority to Medium so that it will run before task instances in Low priority and after task instances in High priority.
- **Low** = Sets the run priority to Low so that it will run after task instances in High and Medium priorities.

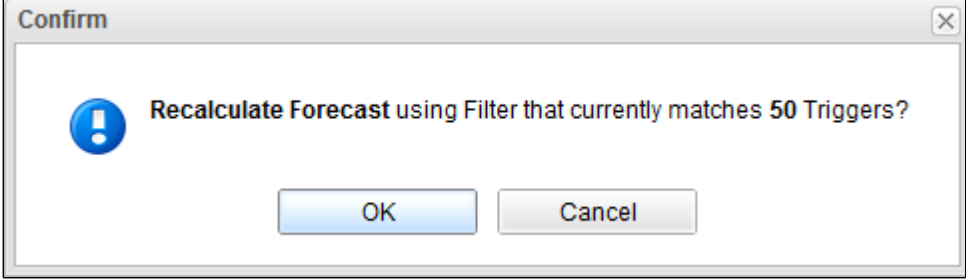




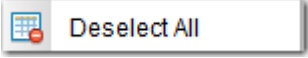
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task Instance s list</li> <li>• Task Instance Details</li> </ul>	<p>Displays all variables currently available to the task instance, including those inherited from a workflow, those passed in from a trigger, or those available globally.</p>
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Places this task in the Skipped status.</p>
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor</li> </ul>	<p>Skips this task instance and all of its dependent task instances.</p>
	<ul style="list-style-type: none"> <li>• Task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Removes the Skip status from this task.</p>
	<ul style="list-style-type: none"> <li>• Task Instance Details</li> <li>• Task Instance on Activity Monitor / Task Instance s list</li> <li>• Task Instance on View Blocking</li> </ul>	<p>Displays a dialog identifying blocking ancestors of a waiting task instance in a Workflow, if any exist. Only task instances that are in a workflow and have not started (that is: Defined, Waiting or Held status) will qualify.</p>





	<p>Ancestor s... pop-up dialog</p>	
	<ul style="list-style-type: none"> <li>• Task Instance Details</li> <li>• Task Instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Displays the Workflow Monitor for the parent Workflow of a selected task instance and highlights that task instance within the Workflow.</p>
	<ul style="list-style-type: none"> <li>• Task Instance Details</li> <li>• Task Instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Displays the Workflow Task Instance Details of the parent Workflow, if applicable, of this task instance.</p>
	<ul style="list-style-type: none"> <li>• Task Instance Details</li> <li>• Task Instance on Activity Monitor / Task Instance s list</li> <li>• Task Instance on View Predecessors /Successors pop-up dialog</li> </ul>	<p>Displays a dialog identifying the predecessors / successors of this task instance in the Workflow, if any exist.</p>
<p><b>Task Monitor Task Instances</b></p>		
		<p>For task instances in Running status; Displays a list of running task instances that have the potential to match the specifications of tasks being monitored by the running Task Monitor task instance.</p>

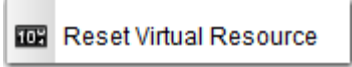
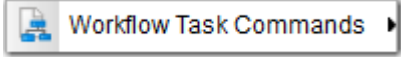

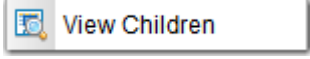

	<ul style="list-style-type: none"> <li>• Task Instance Details</li> <li>• Task instance on Activity Monitor / Task Instance list</li> <li>• Workflow Monitor</li> </ul>	
<b>Tasks</b>		
	<ul style="list-style-type: none"> <li>• Tasks lists</li> <li>• Task Details</li> </ul>	<p>Clears any Execution Restrictions that have been set for this task.</p>
	<ul style="list-style-type: none"> <li>• Task on Tasks list</li> </ul>	<p><a href="#">Launches</a> the task. (Same action as <b>Launch Task</b> button in Task Details.)</p>
	<ul style="list-style-type: none"> <li>• Task Details</li> </ul>	<p><a href="#">Launches this task with one or more variables</a> that you will specify on a Task Variables pop-up dialog.</p>
	<ul style="list-style-type: none"> <li>• Task Details</li> </ul>	<p>Resets the run-time statistics that the Controller has gathered for this task.</p>
	<ul style="list-style-type: none"> <li>• All Tasks list</li> <li>• Tasks list (all task types)</li> </ul>	<p>Executes a selected command against all tasks that match the current filter.</p> <ul style="list-style-type: none"> <li>• <a href="#">Launch Task</a></li> <li>• <a href="#">Add To Bundle</a></li> <li>• <a href="#">Promote</a></li> <li>• <a href="#">Reset Statistics</a></li> <li>• <a href="#">Delete</a></li> </ul>

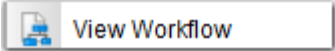
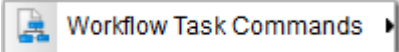
		<p>Before the selected command is executed, a confirmation pop-up displays. For example:</p> 
	<ul style="list-style-type: none"> <li>• Tasks lists</li> <li>• Task Details</li> </ul>	<p>Allows you to sets Execution Restrictions for this task.</p>
	<ul style="list-style-type: none"> <li>• Tasks lists</li> <li>• Task Details</li> </ul>	<p>Displays a list of all parent workflows, if any, of this task. (Same action as <b>View Parents</b> button on Task Details.)</p>
<p><b>Triggers</b></p>		
	<ul style="list-style-type: none"> <li>• Trigger on Triggers list</li> <li>• Trigger Details</li> </ul>	<p>Displays a dialog that lets you select an <a href="#">execution user</a> that overrides the execution user of task instances being launched by the trigger.</p> <p>Users not assigned the <a href="#">ops_admin</a> role must provide the execution user credentials (User ID and Password) in order to assign th execution user to the trigger.</p> <p>Users must have the <b>Assign Execution User</b><a href="#">Trigger permission</a> in order to assign an execution user.</p>
	<ul style="list-style-type: none"> <li>• Trigger record on Triggers list</li> <li>• Trigger Details</li> </ul>	<p>Disables this <a href="#">trigger</a>. (Same action as <b>Disable</b> button on Details.)</p>
	<ul style="list-style-type: none"> <li>• Trigger record on Triggers list</li> </ul>	<p>Enables this <a href="#">trigger</a>. (Same action as <b>Enable</b> button on Details.)</p>




	<ul style="list-style-type: none"> <li>• Trigger Details</li> </ul>	
	<ul style="list-style-type: none"> <li>• Workflow on Workflows list</li> <li>• Workflow Details</li> <li>• Trigger on Workflow Triggers tab list</li> </ul>	<p>Allows for the <a href="#">forecasting of a Workflow</a> by specific date/time.</p>
	<ul style="list-style-type: none"> <li>• Trigger Details</li> </ul>	<p>Lets you modify and display a list of <a href="#">qualifying times</a> for this trigger (the next 30 dates and times when this trigger will be satisfied)</p>
	<ul style="list-style-type: none"> <li>• Trigger on Triggers list</li> <li>• Trigger Details</li> </ul>	<p><a href="#">Recalculates the forecast</a> data for this trigger.</p>
	<ul style="list-style-type: none"> <li>• Triggers list</li> </ul>	<p>Executes a selected command against all triggers that match the current filter.</p> <ul style="list-style-type: none"> <li>• <a href="#">Enable</a></li> <li>• <a href="#">Disable</a></li> <li>• <a href="#">Assign Execution User...</a></li> <li>• <a href="#">Unassign Execution User...</a></li> <li>• <a href="#">Set Skip Count...</a></li> <li>• <a href="#">Recalculate Forecast</a></li> <li>• <a href="#">Add To Bundle...</a></li> <li>• <a href="#">Promote...</a></li> </ul> <p>Note</p>  <ul style="list-style-type: none"> <li>• Enable and Disable are not valid for Active and Manual Triggers.</li> <li>• Disable is not valid for Manual Triggers.</li> <li>• Set Skip Count is not valid for Manual and Temporary Triggers.</li> <li>• Recalculate is valid only for the following lists: All Triggers, Active Triggers, Cron, Time, and Temporary.</li> </ul> <p>Before the selected command is executed, a confirmation pop-up displays. For example:</p>

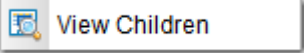
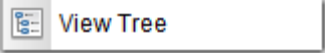
		
	<ul style="list-style-type: none"> <li>• Trigger on Triggers list</li> <li>• Trigger Details</li> </ul>	<p>Lets you perform a Set Skip Count action if you have the Set Skip Count <a href="#">Trigger permission</a>, Update permission, or both.</p>
	<ul style="list-style-type: none"> <li>• Trigger on Triggers list</li> <li>• Trigger Details</li> </ul>	<p>Immediately triggers all the tasks specified in this <a href="#">trigger</a>.</p> <p>(Same action as <b>Trigger Now...</b> button on Trigger Details.)</p> <p>Optionally, you also can select to:</p> <ul style="list-style-type: none"> <li>• Launch the task(s) specified in the trigger with one or more <a href="#">variables</a>.</li> <li>• Launch the task(s) specified in the trigger by a specified <a href="#">date and time</a>.</li> <li>• Launch the task(s) specified in the trigger but place them in <a href="#">Held</a> status; they will not run until they are <a href="#">released</a>.</li> </ul> <p><b>Note</b></p> <p> If a <b>Trigger Now...</b> command is issued for an Enabled trigger that does not have an <a href="#">assigned Execution User</a>, the trigger will launch its task(s) under the context of the user that <a href="#">enabled the trigger</a>.</p> <p>If a <b>Trigger Now...</b> command is issued for a Disabled trigger that does not have an <a href="#">assigned Execution User</a>, the trigger will launch its task(s) under the context of the user that issued the <b>Trigger Now...</b> command.</p> <p>If a <b>Trigger Now...</b> command is issued for an Enabled or Disabled trigger that has an <a href="#">assigned Execution User</a>, the trigger will launch its task(s) under the context of the assigned Execution User.</p>
	<ul style="list-style-type: none"> <li>• Trigger on Triggers list</li> <li>• Trigger Details</li> </ul>	<p>Unassigns an <a href="#">execution user</a> that had been selected to override the execution user of task instances being launched by the trigger.</p> <p>Users must have the <b>Assign Execution User</b><a href="#">Trigger permission</a> in order to unassign an execution user.</p>
<p><b>Universal Templates</b></p>		
	<ul style="list-style-type: none"> <li>• List /Load Built-In</li> </ul>	<p>Deselects all templates on the List/Load Built-In Universal Templates server operation list.</p>

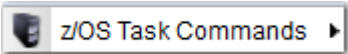



	Universa l Templat es server operation	
 <b>Load</b>	<ul style="list-style-type: none"> <li>List /Load Built-In Universal Templates server operation</li> </ul>	Loads all templates on the List/Load Built-In Universal Templates server operation list to the <a href="#">Universal Templates</a> list.
 <b>Restore Default Icon</b>	<ul style="list-style-type: none"> <li>Universa l Template on Universal Templates list</li> <li>Universa l Template Details</li> </ul>	Restores the default Universal Task icon to all Universal Tasks based on this Universal Template.
 <b>Select All</b>	<ul style="list-style-type: none"> <li>List /Load Built-In Universal Templates server operation</li> </ul>	Selects all templates on the List/Load Built-In Universal Templates server operation list.
<b>Users and Groups</b>		
 <b>Permissions For Group</b>	<ul style="list-style-type: none"> <li>Groups List</li> </ul>	Exports user groups and their permissions (see <a href="#">Exporting Records to an Output File</a> ).
<b>Virtual Resources</b>		
		<a href="#">Resets the Resource Used value</a> of a renewable virtual resource to accurately reflect the actual number of resources currently in use.





	<ul style="list-style-type: none"> <li>Virtual Resource Details</li> </ul>	
<b>Workflow Task Instances</b>		
	<ul style="list-style-type: none"> <li>Workflow task instance on Activity Monitor / Task Instance s list</li> <li>Workflow task instance Details</li> </ul>	<p>Displays a menu of the commands specific to Workflow task instances:</p> <ul style="list-style-type: none"> <li><a href="#">Release Recursive</a></li> <li><a href="#">View Children</a></li> <li><a href="#">View Tree</a></li> <li><a href="#">View Workflow</a></li> </ul>
	<ul style="list-style-type: none"> <li>Workflow task instance on Activity Monitor / Task Instance s list</li> </ul>	<p>Releases this Workflow, and all of its task instances on Held Status, from <a href="#">Held</a> status.</p>
	<ul style="list-style-type: none"> <li>Workflow task instance on Activity Monitor / Task Instance s list</li> <li>Workflow task instance Details</li> <li>Workflow Monitor</li> </ul>	<p>Displays all children task instances of this Workflow task instance (and children task instances of any sub-Workflow task instance and, optionally, their Predecessors and Successors within this Workflow.</p>
	<ul style="list-style-type: none"> <li>Workflow task on Workflo</li> </ul>	<p>Displays a tree view of this workflow task instance and its tasks, including children tasks of any sub-Workflow task, and, optional lets you display the Details for any of those tasks.</p>

	<ul style="list-style-type: none"> <li>w tasks list</li> <li>• Workflow task Details</li> <li>• Workflow Editor</li> <li>• Workflow Forecast</li> <li>• Workflow Monitor</li> <li>• Workflow Vertex in Workflow Editor / Workflow Forecast</li> </ul>	
	<ul style="list-style-type: none"> <li>• Workflow task instance on Activity Monitor / Task Instances list</li> <li>• Workflow task instance Details</li> </ul>	<p>Displays the Workflow Monitor for this Workflow task instance.</p> <p>(Same action as <b>View Workflow</b> button on Details.)</p>
<p><b>Workflow Tasks</b></p>		
	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> <li>• Workflow task on Workflow Tasks list</li> <li>• Workflow task Details</li> </ul>	<p>Displays a menu of the commands specific to Workflow tasks:</p> <ul style="list-style-type: none"> <li>• <a href="#">Clone</a></li> <li>• <a href="#">Edit Workflow</a></li> <li>• <a href="#">Forecast</a></li> <li>• <a href="#">Recalculate Forecast</a></li> <li>• <a href="#">View Children</a></li> <li>• <a href="#">View Tree</a></li> </ul>

	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> <li>• Workflow task on Workflow Tasks list</li> <li>• Workflow task Details</li> </ul>	<p>Creates a copy of the Workflow, a copy of each task in the Workflow, and - optionally - copies of its Virtual Resources.</p>
	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> <li>• Workflow task on Workflow Tasks list</li> <li>• Workflow task Details</li> </ul>	<p>Displays the Workflow Editor for this Workflow.</p>
	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> <li>• Workflow task on Workflow Tasks list</li> <li>• Workflow task Details</li> </ul>	<p>Recalculates the forecast data for this workflow.</p>
	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> </ul>	<p>Allows for the forecasting of a Workflow by specific date/time.</p>

	<ul style="list-style-type: none"> <li>• Workflow task on Workflow Tasks list</li> <li>• Workflow task Details</li> <li>• Trigger on Workflow Triggers tab list</li> </ul>	
	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> <li>• Workflow task on Workflow Tasks list</li> <li>• Workflow task Details</li> <li>• Workflow Editor</li> <li>• Workflow Forecast</li> <li>• Workflow Vertex in Workflow Editor / Workflow Forecast</li> </ul>	<p>Displays all children tasks of this Workflow task (and children tasks of any sub-Workflow task) and, optionally, their Predecessors Successors, and Task Run Criteria within this Workflow.</p>
	<ul style="list-style-type: none"> <li>• Workflow task on All Tasks list</li> <li>• Workflow task on Workflow</li> </ul>	<p>Displays a tree view of this workflow and its tasks, including children tasks of any sub-Workflow task, and, optionally, lets you display the Details for any of those tasks.</p>

	<ul style="list-style-type: none"> <li>• w Tasks list</li> <li>• Workflo w task Details</li> <li>• Workflo w Editor</li> <li>• Workflo w Forecast</li> <li>• Workflo w Vertex in Workflo w Editor / Workflo w Forecast</li> </ul>	
<b>z/OS Task Instances</b>		
	<ul style="list-style-type: none"> <li>• z/OS task instance Details</li> </ul>	<p>Displays a menu of the following actions:</p> <ul style="list-style-type: none"> <li>• <a href="#">Confirm JCL Changes</a></li> </ul>
	<ul style="list-style-type: none"> <li>• z/OS task instance Details</li> </ul>	
	<ul style="list-style-type: none"> <li>• Restartable Job Step tab of z/OS Task Instance Details</li> </ul>	<p>Deselects the selected job step(s) from being included in a z/OS job re-run.</p>
	<ul style="list-style-type: none"> <li>• Restartable Job Steps list in z/OS Task Instance Details.</li> <li>• Restartable Job</li> </ul>	<p>Selects the selected job step(s) for inclusion in a z/OS job re-run.</p>

	Steps Details	
 <b>Select for Re-run (Force)</b>	<ul style="list-style-type: none"> <li>• Restartable Job Steps list in z/OS Task Instance Details.</li> <li>• Restartable Job Steps Details</li> </ul>	<p>Selects the selected non-Restartable job step(s) for inclusion in a z/OS job re-run.</p>
 <b>Select to End for Re-run</b>	<ul style="list-style-type: none"> <li>• Restartable Job Steps list in z/OS Task Instance Details</li> </ul>	<p>Selects the selected job step and all following job steps for inclusion in a z/OS job re-run.</p>
<b>z/OS Tasks</b>		
 <b>z/OS Task Commands</b> ▶	<ul style="list-style-type: none"> <li>• All Tasks list</li> <li>• z/OS Tasks list</li> <li>• z/OS Task Details</li> </ul>	<p>Displays a menu of the following actions:</p> <ul style="list-style-type: none"> <li>• <a href="#">Reset Override Statistics</a></li> </ul>
 <b>Reset Override Statistics</b>	<ul style="list-style-type: none"> <li>• All Tasks list</li> <li>• z/OS Tasks list</li> <li>• z/OS Task Details</li> </ul>	<p>Reset the override statistics used for automated JCL override clean-up.</p>

# Action URLs

- [Overview](#)
- [open Action URL](#)
- [open\\_workflow Action URL](#)
- [run\\_report Action URL](#)

## Overview

Action URLs let you automatically perform actions in the user interface.

There are three action URLs:

Name	Action
<a href="#">open</a>	Navigates to a specific <a href="#">record</a> in the user interface.
<a href="#">open_workflow</a>	Navigate to a specific Workflow Monitor/Editor graph in the user interface.
<a href="#">run_report</a>	Runs a <a href="#">Report</a> and displays the report output without navigating to the <a href="#">Report</a> record.

To use an action URL:

1. Verify that the [URL Action Parameter Enabled](#) Universal Controller system property is set to true (the default).
2. Append the action URL to the URL of the Universal Controller Login page or Home page.

If you do not have an authenticated browser session, regardless of the URL that you specify, you will be redirected to the login page to authenticate. Once authenticated, the action URL will proceed.

If you have an authenticated browser session, and you are entering the action URL from an already loaded application page/browser tab, the application page/browser tab will be reloaded, comparable to a browser refresh, and all unsaved changes will be lost, including any open application tabs.

## open Action URL

The **open** action URL lets you automatically navigate to a specific record.

You must append the **open** action URL to the Login page or Home page URL in the following format: `?action=open&type=<record type>&id=<UUID>`

The **open** action URL contains the following parameters:

Name	Value
<code>action</code>	open
<code>type</code>	Type of record to open.
<code>id</code>	<a href="#">UUID</a> of the specific record to open.

Examples:

- Login Page  
<http://localhost:8081/uc/login.jsp?action=open&type=task&id=b93b64075a49419ea19b74faaa864320>
- Home Page  
<http://localhost:8081/uc/?action=open&type=task&id=b93b64075a49419ea19b74faaa864320>

The following table provides:

- List of the record types that you can navigate to with the **open** action URL.
- `type` parameter value for each record type.

Parameter values with a V suffix, such as `credentialV`, let you navigate to any previous record version of that record type by using the UUID of that version.

Record Type	type Parameter Value
Agent	agent
Agent Cluster	agentCluster, agentClusterV
Application	application, applicationV
Audit	audit
Business Service	businessService, businessServiceV
Calendar	calendar, calendarV
Cluster Node	clusterNode
Credential	credential, credentialV
Custom Day	customDay, customDayV
Data Backup/Purge	backup
Database Connection	databaseConnection, databaseConnectionV
Email Connection	emailConnection, emailConnectionV
Email Template	emailTemplate, emailTemplateV
History	history
OMS Server	omsServer
PeopleSoft Connection	peoplesoftConnection, peoplesoftConnectionV
Report	report
SAP Connection	sapConnection, sapConnectionV
Script	script, scriptV
SNMP Manager	snmpManager, snmpManagerV
Task	task, taskV

Task Instance	exec
Trigger	trigger, triggerV
Variable	variable, variableV
Virtual Resource	virtualResource, virtualResourceV
Widget	widget

## open\_workflow Action URL

The **open\_workflow** action URL lets you automatically navigate to a specific Workflow Monitor/Editor graph in the user interface.

You must append the **open\_workflow** action URL to the Login page or Home page URL in the following format: `?action=open_workflow&type=<record type>&id=<UUID>`

The **open\_workflow** action URL contains the following parameters:

Name	Value
action	open_workflow
type	Type of record to open.
id	<a href="#">UUID</a> of the specific record to open.

Examples:

- Login Page  
[http://localhost:8081/uc/login.jsp?action=open\\_workflow&type=task&id=b93b64075a49419ea19b74faaa864320](http://localhost:8081/uc/login.jsp?action=open_workflow&type=task&id=b93b64075a49419ea19b74faaa864320)
- Home Page  
[http://localhost:8081/uc/?action=open\\_workflow&type=task&id=b93b64075a49419ea19b74faaa864320](http://localhost:8081/uc/?action=open_workflow&type=task&id=b93b64075a49419ea19b74faaa864320)

The following table provides:

- List of the record types that you can navigate to with the **open\_workflow** action URL.
- type parameter value for each record type.

Record Type	type Parameter Value
Workflow Task	task
Workflow Task Instance	exec

## run\_report Action URL

The **run\_report** action URL lets you automatically run a [Report](#) and display the report output without navigating to a specific Report record.

You must append the **run\_report** action URL to the Login page or Home page URL in the following format: `?action=run_report&id=<UUID>`

The **run\_report** action URL contains the following parameters:

--

Name	Value
action	run_report
id	<a href="#">UUID</a> of the specific Report record for which you want to run a report.

Examples:

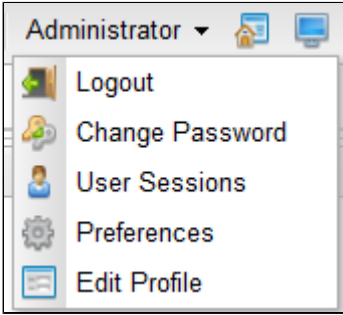
- Login Page  
[http://localhost:8081/uc/login.jsp?action=run\\_report&id=bfe8a7df83b64c90876dfce6cfab0a5a](http://localhost:8081/uc/login.jsp?action=run_report&id=bfe8a7df83b64c90876dfce6cfab0a5a)
- Home Page  
[http://localhost:8081/uc/?action=run\\_report&id=bfe8a7df83b64c90876dfce6cfab0a5a](http://localhost:8081/uc/?action=run_report&id=bfe8a7df83b64c90876dfce6cfab0a5a)

# User Preferences

- [Selecting User Preferences](#)
- [User Preferences Field Descriptions](#)

## Selecting User Preferences

You can select your own preferences for the display of information on the Controller [Activity Monitor](#) and the [Universal Automation Center Console](#).

<p><b>Step 1</b></p>	<p>On the <a href="#">User task bar</a>, click the <a href="#">User Actions</a> drop-down list arrow to display a menu of user actions.</p> 
<p><b>Step 2</b></p>	<p>Click <b>Preferences</b>. The <b>User Preferences</b> dialog pops up.</p>

User Preferences	
Name	Value
Activity Monitor Automatically	No
Activity Refresh Rate	10 seconds
Activity Results Per Page	25 per page
Activity Time Constraint	Last 48 hours
Agent Task Instances Tab Time Constraint	Last 48 hours
Audit Time Constraint	Last 48 hours
Boolean Column Display Format	Yes/No
Console Error Fade Out Delay	7
Console Info Fade Out Delay	3
Console Location	Bottom
Console Open For Info	Yes
Dashboard Force Refresh On Focus	No
Dashboard Force Refresh On Focus Threshold	30 seconds
Go To Operator	contains
History Time Constraint	Last 48 hours
Node Time Display	-- System Default --
Node Time Display Background Color	-- System Default --
Node Time Display Color	-- System Default --
Node Time Display Time Zone	-- System Default --
Pin Tabs Automatically	No
Reference Picker Display Columns	2
Services Recently Visited Limit	10
Show Metadata	-- System Default --
Show Variables Fetch Global Automatically	-- System Default --
Target Task Instances Tab Time Constraint	Last 48 hours
Task Instances Tab Time Constraint	Last 48 hours
Task Instances Time Constraint	Last 48 hours

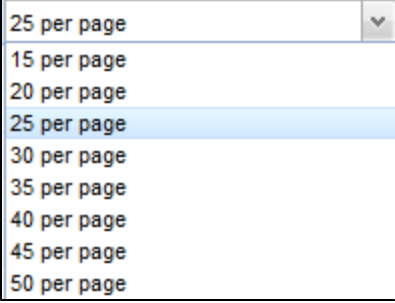
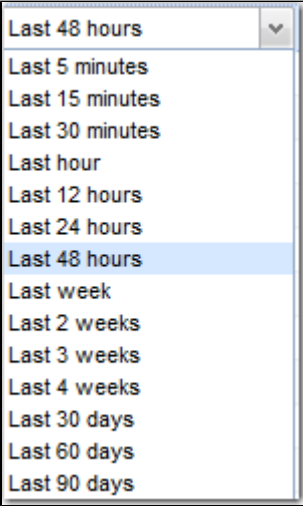
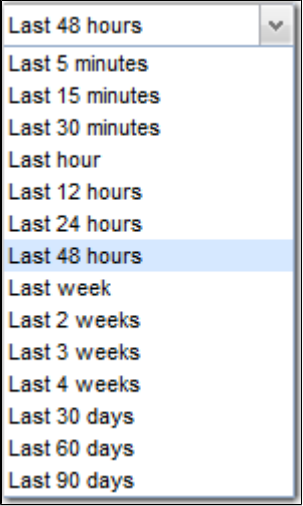
<b>Step 3</b>	Using the <a href="#">field descriptions</a> below as a guide, change any of the User Preferences, as desired.
<b>Step 4</b>	Click the <b>Submit</b> button.

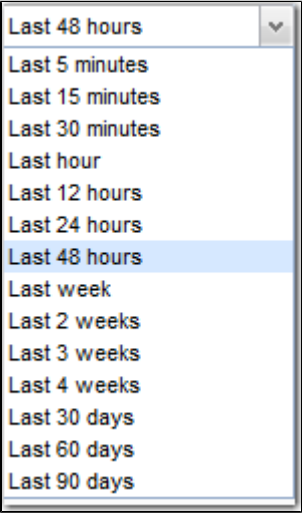
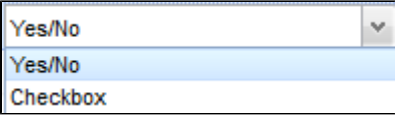
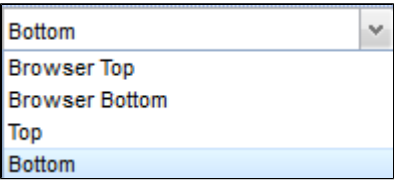
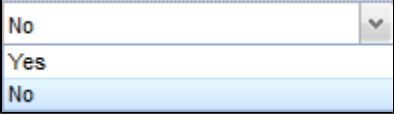


## User Preferences Field Descriptions

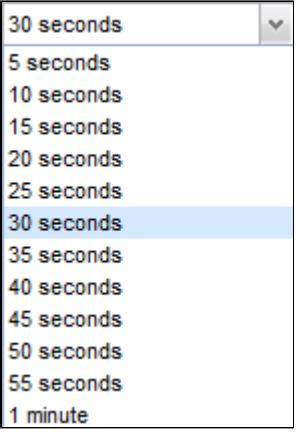
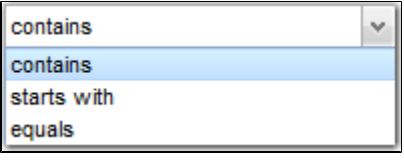
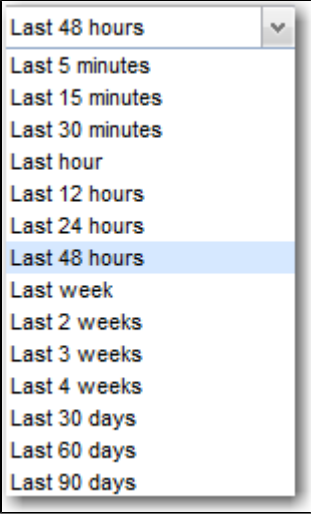

The following table describes the fields that display on the User Preferences pop-up dialog.

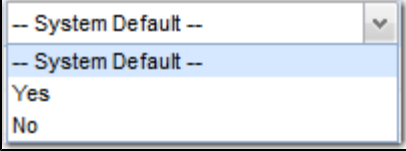
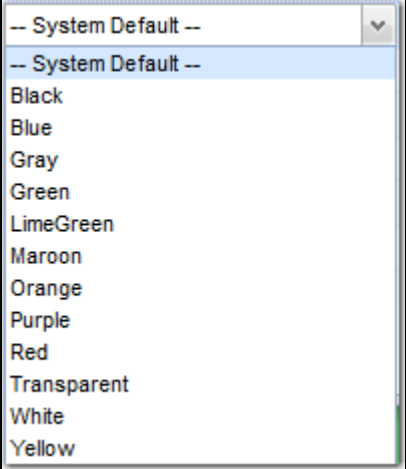
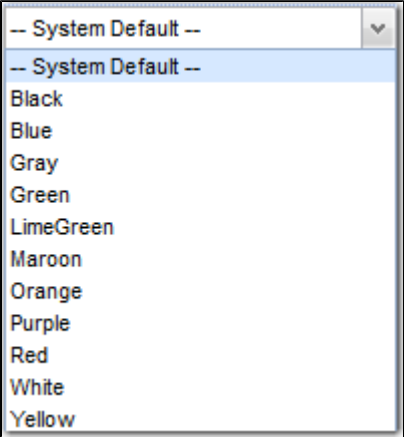
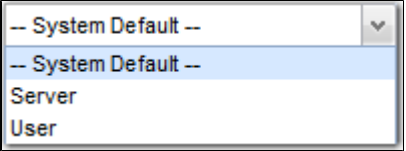
**Default values** are highlighted for every field.

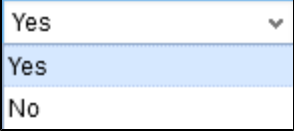
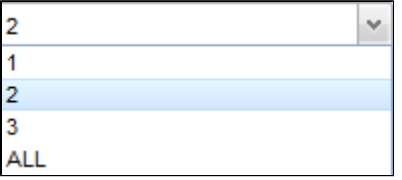
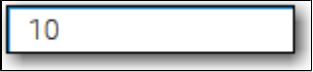
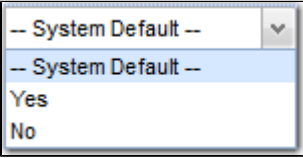
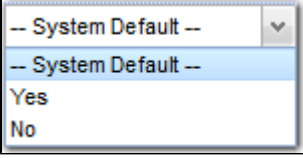
Name	Description	Values
Activity Monitor Automatically	Specifies whether or not the <a href="#">Activity Monitor</a> automatically monitors Controller activity.	
Activity Refresh Rate	Frequency that dynamic data is refreshed on the <a href="#">Activity Monitor</a> .	
Activity Results Per Page	Number of task instances that display on a single page of the <a href="#">Activity Monitor</a>	

		 <ul style="list-style-type: none"> <li>25 per page</li> <li>15 per page</li> <li>20 per page</li> <li>25 per page</li> <li>30 per page</li> <li>35 per page</li> <li>40 per page</li> <li>45 per page</li> <li>50 per page</li> </ul>
<p>Activity Time Constraint</p>	<p>Time frame, starting with the current time, for which activity data is listed on the <a href="#">Activity Monitor</a> and <a href="#">Task Instances list</a>.</p>	 <ul style="list-style-type: none"> <li>Last 48 hours</li> <li>Last 5 minutes</li> <li>Last 15 minutes</li> <li>Last 30 minutes</li> <li>Last hour</li> <li>Last 12 hours</li> <li>Last 24 hours</li> <li>Last 48 hours</li> <li>Last week</li> <li>Last 2 weeks</li> <li>Last 3 weeks</li> <li>Last 4 weeks</li> <li>Last 30 days</li> <li>Last 60 days</li> <li>Last 90 days</li> </ul>
<p>Agent Task Instances Tab Time Constraint</p>	<p>Time frame, starting with the current time, for which instance data is listed on the Task Instances tab of a specific <a href="#">Agent</a>.</p>	 <ul style="list-style-type: none"> <li>Last 48 hours</li> <li>Last 5 minutes</li> <li>Last 15 minutes</li> <li>Last 30 minutes</li> <li>Last hour</li> <li>Last 12 hours</li> <li>Last 24 hours</li> <li>Last 48 hours</li> <li>Last week</li> <li>Last 2 weeks</li> <li>Last 3 weeks</li> <li>Last 4 weeks</li> <li>Last 30 days</li> <li>Last 60 days</li> <li>Last 90 days</li> </ul>

<p>Audit Time Constraint</p>	<p>Time frame, starting with the current time, for which audit data is listed on the <a href="#">Audits</a> list.</p>	
<p>Boolean Column Display Format</p>	<p>Specifies whether Boolean columns on lists will be in Yes/No or enabled/disabled (check box) format.</p>	
<p>Console Error Fade Out Display</p>	<p>Specifies how long the <a href="#">Console</a> will stay open after displaying an error message.</p>	<input data-bbox="1556 824 1948 867" type="text" value="7"/>
<p>Console Info Fade Out Display</p>	<p>Specifies how long the <a href="#">Console</a> will stay open after displaying an informational message.</p>	<input data-bbox="1556 889 1948 932" type="text" value="3"/>
<p>Console Location</p>	<p>Location of the <a href="#">Console</a> that displays when you click the <a href="#">Console icon</a>.</p>	
<p>Console Open For Info</p>	<p>Specifies whether or not the <a href="#">Console</a> will open automatically to display informational messages.</p>	
<p>Dashboard Force Refresh On Focus</p>	<p>Forces a refresh of all Widgets in a Dashboard when the Dashboard is re-focused (that is, the user tabs back to the Dashboard). Whether a Widget qualifies for a refresh depends on the configuration of the <a href="#">Dashboard Force Refresh On Focus Threshold</a> user preference.</p> <p>Warning </p>	

	<p>Depending on user behaviour, enabling this user preference could increase the load on Universal Controller by ultimately increasing the number of and frequency of Widget refreshes.</p>	
<p>Dashboard Force Refresh On Focus Threshold</p>	<p>If the <a href="#">Dashboard Force Refresh On Focus</a> user preference is Yes, when re-focusing an already open Dashboard, each Widget in the Dashboard will be refreshed immediately if the last refresh time of the Widget exceeds this threshold (Default is 30 seconds).</p>	
<p>Go To Operator</p>	<p>Specifies the default operator for the <a href="#">Go To filter</a>:</p> <ul style="list-style-type: none"> <li>• contains</li> <li>• starts with</li> <li>• equals</li> </ul>	
<p>History Time Constraint</p>	<p>Time frame, starting with the current time, for which history data is listed on the <a href="#">History list</a></p>	
<p>Node Time Display</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for whether or not to display the Cluster Node time in the <a href="#">User Task Bar</a>, or to select <b>Yes</b> or <b>No</b>.</p> <p>Note </p>	

	<p>For a change in Cluster Node time visibility to take effect, you must re-login or click your browser refresh button. In either case, all unsaved changes will be lost, including any open application tabs.</p>	
<p>Node Time Display Background Color</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> as the background color of the Cluster Node time in the <a href="#">User Task Bar</a> or select another color.</p>	
<p>Node Time Display Color</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> as the color of the Cluster Node time in the <a href="#">User Task Bar</a> or select another color.</p>	
<p>Node Time Display Time Zone</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for the cluster node time zone in the <a href="#">User Task Bar</a>, or to use the time zone of the <b>Server</b> or <b>User</b>.</p>	
<p>Pin Tabs Automatically</p>	<p>Specifies whether or not to pins tabs automatically.</p>	

	<ul style="list-style-type: none"> <li>• If No (default):             <ul style="list-style-type: none"> <li>• Users must pin their own tabs.</li> <li>• Once a tab is pinned, a tab will not be replaced by a new tab being opened and will remain designated as pinned between a user's sessions.</li> <li>• Pinned tabs are identified with a pin icon displayed in the tab.</li> <li>• Tabs are pinned by DataSource; therefore, once you pin a type of tab (for example, Reports,) any time you open Reports in a tab, it will be designated as pinned.</li> </ul> </li> <li>• If Yes:             <ul style="list-style-type: none"> <li>• All tabs will be pinned automatically, no pin icon will be displayed, and legacy tab behavior will be applied.</li> </ul> </li> </ul>	
<p>Reference Picker Display Columns</p>	<p>Where applicable, if additional information is available for Controller records in drop-down lists, the columns of information displayed for each record:</p> <ul style="list-style-type: none"> <li>• 1 = Record name only.</li> <li>• 2 = Record name and type.</li> <li>• 3 = Record name, type, and ID or Description.</li> <li>• All = (Same as 3.)</li> </ul>	
<p>Services Recently Visited Limit</p>	<p>Maximum number of Services that will display in the Recently Visited column for Available Services in the user interface.</p> <p>If the number of recently visited Services exceeds this number, the earliest of the recently visited Services will be dropped from the column.</p> <p>Default is 10.</p>	
<p>Show Metadata</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for whether or not the <a href="#">Metadata</a> section displays automatically in the the Details of all Controller records, or to override the system default by selecting <b>Yes</b> or <b>No</b>.</p>	
<p>Show Variables Fetch Global Automatically</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for whether or not to fetch and display <a href="#">Global Variables</a> automatically for the <a href="#">Show Variables</a> action, or to override the system default by selecting <b>Yes</b> or <b>No</b>.</p>	
<p>Target Task Instances Tab Time Constraint</p>	<p>Time frame, starting with the current time, for which target task instance data is listed on the Target Task Instances tab of a <a href="#">Recurring Task instance</a>.</p>	

		<div data-bbox="1549 131 1843 768"> <ul style="list-style-type: none"> <li>Last 5 minutes</li> <li>Last 15 minutes</li> <li>Last 30 minutes</li> <li>Last hour</li> <li>Last 12 hours</li> <li>Last 24 hours</li> <li style="background-color: #e1eef6;">Last 48 hours</li> <li>Last week</li> <li>Last 2 weeks</li> <li>Last 3 weeks</li> <li>Last 4 weeks</li> <li>Last 30 days</li> <li>Last 60 days</li> <li>Last 90 days</li> </ul> <div style="border: 1px solid #ccc; padding: 2px;">Last 48 hours ▾</div> </div>
<p>Task Instances Tab Time Constraint</p>	<p>Time frame, starting with the current time, for which instance data is listed on the <a href="#">Instances tab</a> of a specific task.</p>	<div data-bbox="1549 797 1843 1433"> <ul style="list-style-type: none"> <li>Last 5 minutes</li> <li>Last 15 minutes</li> <li>Last 30 minutes</li> <li>Last hour</li> <li>Last 12 hours</li> <li>Last 24 hours</li> <li style="background-color: #e1eef6;">Last 48 hours</li> <li>Last week</li> <li>Last 2 weeks</li> <li>Last 3 weeks</li> <li>Last 4 weeks</li> <li>Last 30 days</li> <li>Last 60 days</li> <li>Last 90 days</li> </ul> <div style="border: 1px solid #ccc; padding: 2px;">Last 48 hours ▾</div> </div>
	<p>Time frame, starting with the current time, for which instance data is listed on the <a href="#">Task Instances list</a>.</p>	

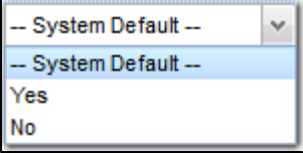

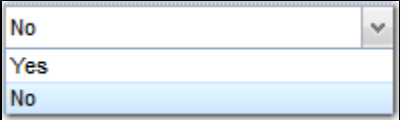
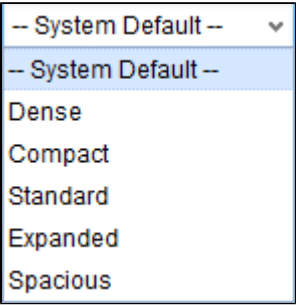
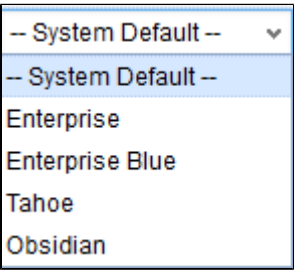
Task Instances Time Constraint

- Last 5 minutes
- Last 15 minutes
- Last 30 minutes
- Last hour
- Last 12 hours
- Last 24 hours
- Last 48 hours
- Last week
- Last 2 weeks
- Last 3 weeks
- Last 4 weeks
- Last 30 days
- Last 60 days
- Last 90 days
- Last 48 hours ▼

Trigger Task Instances Time Tab Constraint

Time frame, starting with the current time, for which task instances display on a trigger Instances tab.

- Last 5 minutes
- Last 15 minutes
- Last 30 minutes
- Last hour
- Last 12 hours
- Last 24 hours
- Last 48 hours
- Last week
- Last 2 weeks
- Last 3 weeks
- Last 4 weeks
- Last 30 days
- Last 60 days
- Last 90 days
- Last 48 hours ▼

<p>Use Dashboard Visibility Icons</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for whether or not to include visibility indicator icons in the <a href="#">Dashboard tabs</a> that display at the bottom of the Dashboards page, or to select <b>Yes</b> or <b>No</b>.</p>	 <p>A dropdown menu with the following options: -- System Default -- (selected), -- System Default --, Yes, and No.</p>
<p>Use Default Dashboard For Home</p>	<p>Specifies whether you want to use the currently selected <a href="#">default Dashboard</a> as the Home dashboard for this user (<b>Yes</b>) or use the system-defined default Dashboard as the Home dashboard (<b>No</b>).</p> <p><b>Warning</b>   We strongly encourage you to maintain the system-defined default Dashboard as your <a href="#">Home dashboard</a>. At login, all <a href="#">Widgets</a> on the Home dashboard will be loaded. By keeping the system-defined default Dashboard, you will maintain a more consistent and optimal login process.</p>	 <p>A dropdown menu with the following options: No (selected), Yes, and No.</p>
<p>User Interface Density</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for the user interface density, or to select another density.</p>	 <p>A dropdown menu with the following options: -- System Default -- (selected), -- System Default --, Dense, Compact, Standard, Expanded, and Spacious.</p>
<p>User Interface Theme</p>	<p>Specifies whether to use the currently defined <a href="#">system default</a> for the user interface theme, or to select another theme.</p>	 <p>A dropdown menu with the following options: -- System Default -- (selected), -- System Default --, Enterprise, Enterprise Blue, Tahoe, and Obsidian.</p>



# Wildcards and Regular Expressions

- [Introduction](#)
- [Wildcards](#)
  - [File Name Examples](#)
- [Regular Expressions](#)
  - [File Name Examples](#)
  - [String Examples](#)

## Introduction

Universal Controller supports the use of wildcards and regular expressions in the user interface and [remote interfaces](#).

For files, wildcards and regular expressions can be used only in:

- Source file specifications, not destination file specifications. (Under some operating systems, it is possible for \* and ? to be valid characters in a file name. If they appear in a destination file, they are treated as file characters, not as wildcards or regular expressions.)
- File name portion of file specifications, not as part of the directory.

## Wildcards

Universal Controller supports two wildcards:

- Asterisk (\*)
- Question mark (?)

You can use wildcards in record searches and when applying some rule or command against records. Fields that support wildcards are identified in their field description.

Wildcard	Meaning
Asterisk (*)	Represents a wildcard of any number of characters.  For example, a search for string "FEE*SF" returns all records whose name begins with "FEE" and ends with "SF", with any number and type of characters between the two strings.
Question mark (?)	Represents a wildcard of one character in a specific position.  For example, a search for string "FEE?SF" returns all records whose name begins with "FEE" and ends with "SF", with any single character between the two strings.
Multiple questions marks	Represent wildcards of multiple characters in a specific position.  For example, a search for string "FEE??SF" returns all records whose name begins and ends with "FEE" and "SF", respectively, with any two characters between the two strings.

## File Name Examples

### File Names

1. test.txt
2. test1.txt
3. test2.txt
4. test3.txt
5. test.bin
6. test1.bin
7. test2.bin
8. test3.bin

## Wildcard Matches

- \*, \*.\* , test\*.\* , and tes?\*. will match all of the files.
- \*.txt will match files 1 - 4.
- \*.bin will match files 5 - 8.
- test?.txt will match files 2 - 4.

## Regular Expressions

Important!



POSIX Extended Regular Expression syntax is used for file name matching and string matching.

Note



You can use regular expressions only on Windows and UNIX operating systems; you cannot use them on z/OS.

## File Name Examples

### File Names

1. test.txt
2. test1.txt
3. test2.txt
4. test3.txt
5. test.bin
6. test1.bin
7. test2.bin
8. test3.bin

## Regular Expression Matches

- .+, tes.+, and te.+[tn]\$ will match all of the files.
- .+txt\$ will match files 1 - 4.
- .+bin\$ will match files 5 - 8.
- te..[123].+bin\$ will match files 6 - 8.

## String Examples

C:\UDM\TEST\OUT\LinuxSystem.[D](20)[1-9][1-9][0-1][0-9][0-3][0-9][.][T][0-2][0-9][0-5][0-9][0-5][0-9].*	Matches C:\UDM\TEST\OUT\LinuxSystem.D20171001.T235159.*
C:\UDM\TEST\OUT\LinuxSystem.[D][1-9][1-9][0-1][0-9][0-3][0-9][.][T][0-2][0-9][0-5][0-9][0-5][0-9].*	Matches C:\UDM\TEST\OUT\LinuxSystem.D171001.T235159.*
C:\UDM\TEST\OUT\LinuxSystem.[D](20)[1-9][1-9][0-1][0-9][0-3][0-9][.][T][0-2][0-9][0-5][0-9][0-5][0-9].*	Fails C:\UDM\TEST\OUT\LinuxSystem.D2017201033.T235159.* month 20 day 33!

C:\UDM\TEST\OUT\LinuxSystem.[D][1-9][1-9][0-1][0-9][0-3][0-9][.][T][0-2][0-9][0-5][0-9][0-5][0-9].\*

Fails C:\UDM\TEST\OUT\LinuxSystem.D171001.T266159.\* hour 26 minutes 61!

# Access Keys

- [Overview](#)
- [Access Key Combination](#)
- [Access Keys](#)

## Overview

In a web browser, access keys allow you to immediately jump to specific sections of a web page using only the keyboard.

To use an access key, press the access key in combination with one or more other keys, as defined by the browser, in order to focus an element on a page.

## Access Key Combination

The following access key combinations, which vary for different browsers / platforms, are implemented in Universal Controller:

Browser	Platforms	Access Key Combination
Mozilla Firefox	Windows, Unix	Alt+Shift + access key
Mozilla Firefox	Mac	Ctrl+Opt + access key
Chrome	Windows, Unix	Alt + access key
Chrome	Mac	Ctrl+Opt + access key

## Access Keys

The following access keys are pre-defined in Universal Controller:

Access Key	Description
G	Focuses the <b>Go To...</b> button on any list so that the <a href="#">Go To Filter</a> dialog can be displayed by pressing <b>Enter</b> .