

Lifecycle Management

Universal Controller 7.6.x

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Table of Contents

1	Bundles	6
2	Bundles	7
3	Promotion.....	6
4	Promotion History.....	7
5	Promotion Schedules	8
6	Bundles and Promotion Overview.....	9
6.1	Overview	9
6.2	Bundle and Promotion Security	10
6.2.1	Bundle Security	10
6.2.2	Promotion Security	10
6.2.3	Bundleless Promotion	11
6.3	Universal Controller Properties	11
6.4	Best Practices	11
6.4.1	Shared Records.....	11
6.4.2	Follow References	12
6.4.3	Modifying Task Names.....	12
6.4.4	Promoting Between Different Controller Versions	12
6.5	Bundling and Promoting Process	13
6.6	Diagnosing Promotion Failures.....	14
7	Preparing Bundles for Promotion	20
7.1	Overview	20
7.1.1	Creating a Bundle for Promotion by Selecting Individual Records.....	20
7.1.2	Creating a Bundle for Promotion by Date.....	21
7.1.3	Creating a Bundle for Promotion by Business Services.....	23
7.1.4	Promoting Bundles by Business Service Membership.....	25
7.1.5	Bundle Details	26
7.2	Adding and Removing Records in a Bundle	29
7.2.1	Adding and Removing Records from the Bundle Details	30
7.2.2	Adding a Record to a Bundle from the Record Details	31

7.2.3	Adding Multiple Records to a Bundle from a Records List	32
7.3	Displaying the Bundles List for a Record.....	33
7.4	Reports	33
7.5	Widgets.....	34
8	Generating a Bundle Report	36
8.1	Introduction	36
8.2	Generating a Report.....	36
9	Creating Promotion Targets.....	39
9.1	Creating a Promotion Target.....	39
9.2	Promotion Target Details	40
9.2.1	Promotion Target Details Field Descriptions	40
10	Specifying Agent Mapping	43
10.1	Specifying Agent Mapping	43
10.1.1	Refresh Agent Error Messages	45
11	Promoting Bundles and Records to a Target.....	47
11.1	Overview	47
11.2	Promoting a Bundle	48
11.3	Scheduling a Bundle Promotion.....	50
11.4	Promoting One or More Individual Records	53
11.5	Promoting Universal Tasks and Universal Templates.....	57
11.6	Diagnosing Promotion Failures.....	57
11.7	Promotion Audit Records	63
12	Promotion History and the Restore Option	65
12.1	Overview	65
12.2	Accessing Promotion History Records	65
12.3	Promotion History Details Field Descriptions	66
13	Promotion Schedules	68
13.1	Overview	68
13.2	Viewing Promotion Schedule Details	68
13.3	Promotion Schedule Details Field Descriptions.....	69

13.4	Modifying and/or Rescheduling a Promotion Schedule.....	71
13.5	Modifying and/or Rescheduling a Successfully Promoted Promotion Schedule....	73
13.6	Cancelling a Promotion Schedule.....	74
14	Records Promoted When Follow References is Selected or Not Selected	76
14.1	Introduction	76

1 Bundles

- [Overview](#)
- [Best Practices](#)
- [Preparing Bundles for Promotion](#)
- [Generating a Bundle Report](#)
- [Bundling and Promotion Process](#)

2 Promotion

- [Creating Promotion Targets](#)
- [Specifying Agent Mapping](#)
- [Promoting Bundles and Records to a Target](#)
- [Promotion Error Messages](#)
- [Promotion Audit Records](#)
- [Diagnosing Promotion Failures](#)

3 Bundles

[Preparing Bundles for Promotion](#)

[Generating a Bundle Report](#)

4 Promotion History

[Promotion History and the Restore Option](#)

5 Promotion Schedules

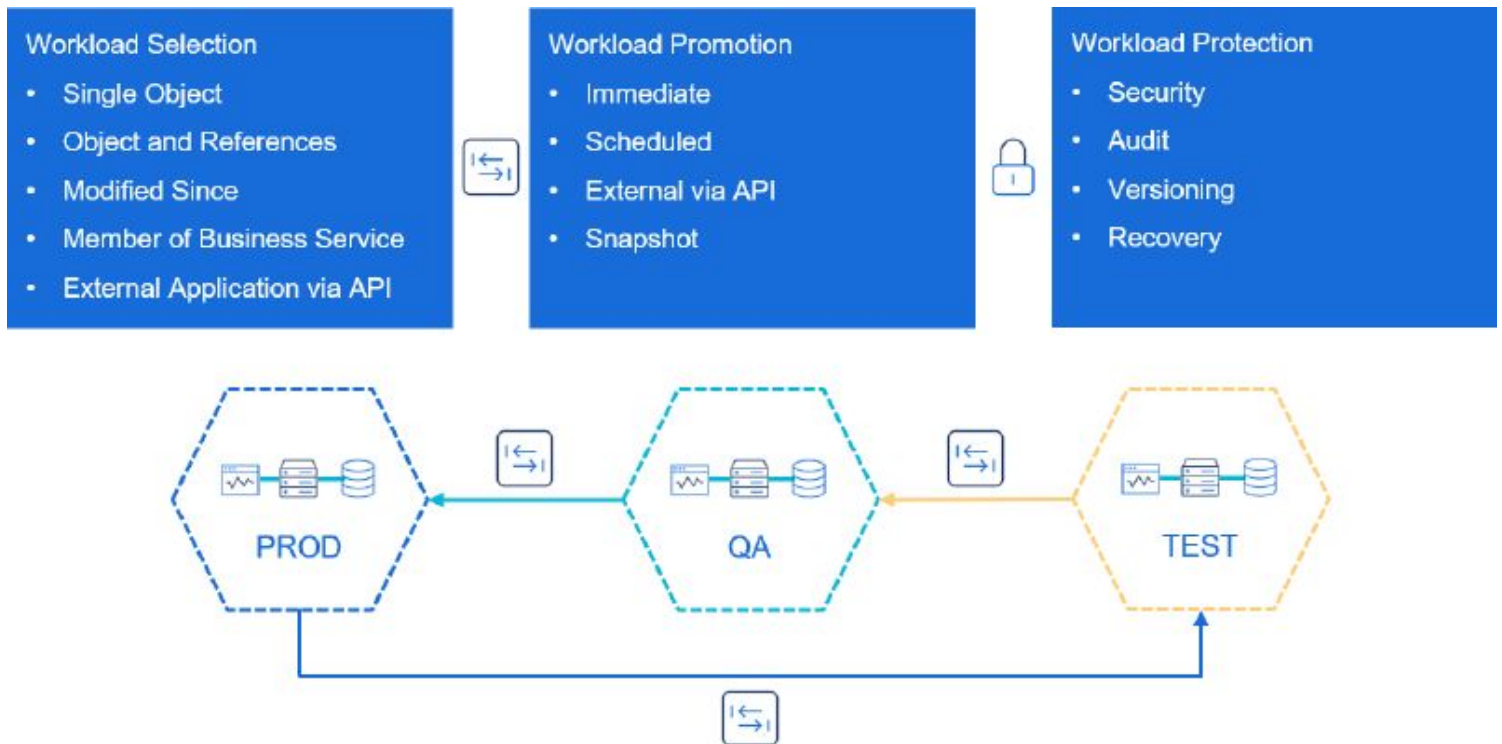
[Promotion Schedules](#)

6 Bundles and Promotion Overview

6.1 Overview

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

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



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

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

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

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

6.2 Bundle and Promotion Security

Use of the Bundle and Promotion feature requires some thought, based on which users require the feature and what functions they need access to.

6.2.1 Bundle Security

The [ops_bundle_admin](#) role, which automatically is encompassed within the [ops_admin](#) role, grants the following functions:

- Create, read, update, and delete [Bundles](#).
- View [Promotion Targets](#), including [agent mappings](#).
- View [Promotion History](#)
- View a record's [list of bundles](#)
- View [Promotion Schedules](#).
- [Add a record to a bundle](#)
- [Create bundles by date](#)
- Generate a [Bundle Report](#)

Users can be granted more granular permissions to [Bundles](#) via their User or Group permissions:

- Read - View bundles based on name and/or membership of business service.
- Update - View, and Modify bundles based on name and/or membership of business service.
- Create - Create, View, and Modify bundles based on name and/or membership of business service.
- Delete - Delete bundles based on name and/or membership of business service.
- The Promote command for a bundle can be granted or denied via the Bundle permission.

Users can select definitions only for Bundles that they can at least view.

6.2.2 Promotion Security

The [ops_promotion_admin](#) role, which automatically is encompassed within the [ops_admin](#) role, grants the following functions:

- Create, read, update, and delete [Promotion Targets](#), including agent mappings.
- View [Bundles](#).
- [Refresh Target Agents](#)
- [Promote records](#)
- [Promote](#) or [schedule the promotion](#) of a bundle.
- Reschedule, cancel, and delete [Promotion Schedules](#)
- [Generate a Bundle report](#)
- Accept bundles being promoted to a target server. (The **Accept Bundle** command is executed on the target server automatically as part of the **Promote** and **Promote Bundle** commands and does not involve user interaction.)

Note

By default, the [ops_promotion_admin](#) role also grants Read permission for any type of definition that can be added to a Bundle, given the expectation that a promotion administrator would review the content of a Bundle before promoting it. To change this default behaviour, see the [Promotion Read Permission Required](#) Universal Controller system property.

Users can be granted more granular permissions to Promotion Targets via their User or Group permissions:

- Read - View promotion targets based on name and/or membership of business service
- Update - View, and Modify promotion targets based on name and/or membership of business service
- Create - Create, View, and Modify promotion targets based on name and/or membership of business service
- Delete - Delete promotion targets based on name and/or membership of business service
- The Refresh Target Agents command for a promotion target can be granted or denied via the bundle permission.

The ability to Promote a Bundle without the [ops_promotion_admin](#) role requires:

- Read permission to the Bundle
- Permission to the Promote command for the Bundle
- Execute permission to the Promotion Target
- [ops_promotion_accept_bundle](#) role assigned to the target user; specifically, the user specified on the Promotion Target or on the Promote Bundle command dialog.

6.2.3 Bundleless Promotion

With the [ops_promotion_admin](#) role, users can promote definitions by clicking **Promote...** in the [Action menu](#).

The [Bundleless Promotion With Execute Permission Permitted](#) Universal Controller system property can be set to true (default = false) to allow promotion of definitions outside of a Bundle without requiring the [ops_promotion_admin](#) role if the users also have Execute permission to at least one Promotion Target.

6.3 Universal Controller Properties

The following [Universal Controller system properties](#) also should be reviewed in accordance with the desired behavior of the Bundles and Promotion feature:

- Promotion Accept Bundle Create/Update Permission Required
- Promotion History Retention Period in Days
- Promotion Read Permission Required
- Promotion Schedule Retention Period In Days
- Promotion Strict Mode

6.4 Best Practices

6.4.1 Shared Records

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

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

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

One best practice for this is to create the definitions on one Universal Controller instance and promote them to the other Universal Controller instances. In some cases, these definitions will need to be different on each Universal Controller instance;

for example, a credentials password will be different between the test and production instances. In these cases, you would need to modify them after the initial promotion, and you will need to take care not to promote the test definition and overwrite the production definition with the wrong password.

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

For example:

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

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

6.4.2 Follow References

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

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

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

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

For additional information on Follow References behavior, see [Records Promoted When Follow References is Selected or Not Selected](#).

6.4.3 Modifying Task Names

When modifying a task name, Universal Controller ensures that the vertex data of any workflow task containing that task is updated, assuming a vertex alias is not being used.

To promote the task name modification to another system, promote both the task and any workflow task that would have been modified by the change. You can use the View Parents operation to determine parent workflow tasks. In the case where you modify a task name and do not promote the parent workflow tasks, the vertex names can become out-of-sync.

6.4.4 Promoting Between Different Controller Versions

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

Note

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

6.4.4.1 Promoting to Same or Later Versions

6.4.4.1.1 Supported

Promotion from a source Controller to a target Controller of the same or later version, release, modification, and maintenance level is supported.

For example:

- 6.9.0.0 to 6.9.0.1
- 6.9.0.1 to 7.0.0.0
- 7.0.0.0 to 7.0.0.0

6.4.4.2 Promoting to Earlier Versions

6.4.4.2.1 Supported

Promotion from a source Controller to a target Controller of an earlier version, release, modification, or maintenance level is supported if the target Controller has not reached an [End of Support Date](#).

For example:

- 6.9.0.1 to 6.9.0.0
- 7.0.0.0 to 6.9.0.1

6.4.4.2.2 Not Supported

Promotion from a source Controller to a target Controller of an earlier version, release, modification, or maintenance level is not supported if the target Controller has reached an [End of Support Date](#).

For example:

- 7.0.0.0 to 6.6.0.1

6.5 Bundling and Promoting Process

The general process for bundling and promoting your data is:

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

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

6.6 Diagnosing Promotion Failures

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

Note

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

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

Error Message	Diagnosis
<i>Acceptance of bundle "<bundle-name>" from <node-id> prohibited because a payload from a bundle with the same name is currently being processed by another Universal Controller process.</i>	Accept Bundle command invoked on the target for a bundle with a bundle name for which another Universal Controller process has already acquired a lock.
<i>Bundle "Member of Business Services" option requires a minimum promotion target release level of 6600.</i>	Attempt to promote a Bundle that is a member of a Business Service to a target that is not 6.6.0.0. or higher.
<i>Cannot update Universal Template <Template Name>: Universal Template cannot be updated; System Template cannot be changed.</i>	Attempt to promote a Universal Task that references a Universal Template (not built-in) and the incoming Universal Template matches a Universal Template on the Promotion Target and it is a built-in Universal Template.
<i>Cluster node information could not be determined for the promotion target because the host is unknown (hostname).</i>	Invalid hostname.
<i>Cluster node information could not be determined for the promotion target (Connection refused: connect).</i>	Valid hostname, but no service to accept the connection.
<i>Cluster node information could not be determined for the promotion target because the Web Service is unavailable; the target Universal Controller may still be initializing.</i>	Attempt to promote to a target Universal Controller that is still initializing (starting up).
<i>Cluster node information could not be determined for the promotion target because the user is not authorized; please verify the promotion target user and password.</i>	Invalid user name and/or password.
<i>Cluster node information could not be determined for the promotion target because the user is not authorized for Web Service Access; please verify the promotion target user has Web Service Access enabled.</i>	Valid user name and password, but the user is not authorized for Web Service Access.
<i>Cluster node release level for the promotion target could not be determined and one or more items being promoted require a minimum release level of 6300.</i>	Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.

Error Message	Diagnosis
<p>Cluster node release level for the promotion target is 6xxx, which does not meet the required release level of 6xxx.</p>	<p>Attempt to promote a definition, or a definition using a particular feature, that is not recognized by the promotion target.</p> <p>This message will be followed by one or more messages, each detailing a specific definition or specific feature used by a definition that is not recognized by the promotion target.</p> <p>For example:</p> <p><i>Cluster node release level for the promotion target is 6403, which does not meet the required release level of 6420. Windows Task "Resolve Name Immediately" option requires a minimum promotion target release level of 6420. Web Service Tasks require a minimum promotion target release level of 6410.</i></p> <p>OR</p> <p><i>Cluster node release level for the promotion target is 6601, which does not meet the required release level of 6700. <task-type> Task "Cluster Broadcast Variable" option requires a minimum promotion target release level of 6700.</i></p>
<p>Command Accept Bundle prohibited due to security constraints.</p>	<p>Valid user name and password, but the user is not authorized for the Accept Bundle command, which requires the ops_promotion_admin role.</p>
<p>Command Accept Bundle prohibited due to security constraints. User on target server requires "ops_bundle_admin" role if "Promote Bundle Definition" option is enabled.</p>	<p>Valid user name and password, but the user is not authorized for the Accept Bundle command with the Promote Bundle Definition option enabled, which requires both the ops_promotion_admin role and the ops_bundle_admin role.*</p>
<p>Command Promote (or Promote Bundle) has been routed to the Active server and continues to run in the background.</p>	<p>Promote (or Promote Bundle) command was issued to a Passive server and routed to the Active server, where the Promote (or Promote Bundle) command will run, however, the Promote (or Promote Bundle) command did not complete within approximately 2 minutes.</p> <p>The Promote (or Promote Bundle) command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.</p>
<p>Command Promote cannot be executed because the follow references not permitted; Universal Controller property "Promotion Follow References Permitted" is not enabled.</p>	<p>Cannot promote a bundle or workflow when the property is false and the follow reference is checked.</p>
<p>Command Promote Bundle cannot be executed because Promote Members of Business Services or Visible To is not empty, and Universal Controller property "Promote By Business Service Membership Permitted" is not enabled.</p>	<p>Attempt to promote a bundle with Promote Members of Business Services or Visible To non-empty when Promote By Business Service Membership property is false.</p>
<p>Command Schedule Promotion cannot be executed because Promote Members of Business Services or Visible To is not empty, and Universal Controller property "Promote By Business Service Membership Permitted" is not enabled.</p>	<p>Attempt to schedule a bundle promotion (using Snapshot) with Promote Members of Business Services or Visible To non-empty when Promote By Business Service Membership property is false.</p>
<p>Credential "<credential-name>" cannot be promoted because web service credentials are not permitted; Universal Controller property Web Service Credentials Permitted is not enabled.</p>	<p>Attempt to promote to a target Controller where the Web Service Credentials Permitted Universal Controller system property is set to false.</p>
<p>Email Notification "List Report Format" option "<format option>" requires a minimum promotion target release level of 7300.</p>	<p>Attempt to promote a Task that has an Email Notification with List Report Format = XML/JSON/CSV/TSV to a target that is not 7.3.0.0. or higher.</p>
<p>Email Task "List Report Format" option "<format option>" requires a minimum promotion target release level of 7300.</p>	<p>Attempt to promote a Email Task with List Report Format = XML/JSON/CSV/TSV to a target that is not 7.3.0.0. or higher.</p>

Error Message	Diagnosis
<i>Field "Default Value", when greater than 4000 characters, requires a minimum promotion target release level of 7200.</i>	Attempt to promote a Universal Template with a Default Value field value greater than 4000 to a target that is not a 7.2.0.0 or later release.
<i>File Transfer Task "Transfer Protocol" option "FTPES" requires a minimum promotion target release level of 7200.</i>	Attempt to promote a File Transfer Task with Transfer Protocol = FTPES to a release earlier than 7.2.0.0.
<i>File Transfer Task "Authenticate Peer" option requires a minimum promotion target release level of 7200.</i>	Attempts to promote a File Transfer Task with "Authenticate Peer" option requires a minimum promotion target release level of 7200.
<i>File Transfer Task "Verify Host Name" option requires a minimum promotion target release level of 7200.</i>	Attempt to promote a File Transfer Task with "Verify Host Name" option requires a minimum promotion target release level of 7200.
<i>Promoted {EMAIL CONNECTION: Incoming} with name "Gmail" and id 04e5e1074c1f42908d9b3f62f36fff50 is a different type than the original {EMAIL CONNECTION: Outgoing} with name "Gmail" and id 195fc662df8447dc90dec02ea8be0cb4</i>	Attempt to promote an Incoming email connection type and the email connection on the target system is an Outgoing email connection type.
<i>Promoted {EMAIL CONNECTION: Outgoing} with name "Gmail" and id ab36222512cf4ae4afa7e59a8ccbd684 is a different type than the original {EMAIL CONNECTION: Incoming} with name "Gmail" and id a037048f7c4b4e3f9e8691e3f664e5a7</i>	Attempt to promote an Outgoing email connection type and the email connection on the target system is an Incoming email connection type.
<i>Promoted {TASK: Universal} with name "ABC", id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e318 has a different universal template id than the original "ABC" with id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e319.</i>	Attempt to promote a Universal Task with an associated Universal Template that is not equivalent to the Universal Template associated with the target Universal Task.
<i>Promoted {TASK: Universal} with name "<Task Name>" and id <Task UUID> references a built-in Universal Template with name "<Template Name>" and id <Template UUID> that is not loaded on the target server. Use the "List/Load Built-in Universal Templates" Server Operation to load built-in Universal Templates.</i>	Attempt to promote a Universal Task that references a built-in Universal Template and the built-in Universal Template does not exist on the Promotion Target.
<i>Promoted {TASK: Universal, TaskUniversalBean} with name "ABC" and id 8ee785079fcc4142873486e921bfe789 is a different type and/or class than the original {TASK: Timer, TaskSleepBean} with name "ABC" and id dfbd23df8ab24b2a9a0891ae2f8ca22f.</i>	Attempt to promote any item of a specific type (or Java class) that matches another item of a different type (or Java class).
<i>Promoted {UNIVERSAL TEMPLATE} with name "<Template Name>" and id <Template UUID> has a different id than the original "<Template Name>" with id <Template UUID>.</i>	Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template matches a Universal Template on the Promotion Target by name only (that is; UUID mismatch).
<i>Promoted {UNIVERSAL TEMPLATE} with name "<Template Name>" and id <Template UUID> is a built-in universal template; however, the original "<Template Name>" with id <Template UUID> is not.</i>	Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template matches a Universal Template on the Promotion Target and it is <u>not</u> a built-in Universal Template.
<i>Promoted {UNIVERSAL TEMPLATE} with name "<Template Name>" and id <Template UUID> matches both "<Template 1 Name>" with id <Template 1 UUID> by name and "<Template 2 Name>" with <Template 2 UUID> by id.</i>	Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template matches a Universal Template on the Promotion Target by both name and id . In other words, Promotion Strict Mode is always used for built-in Universal Templates.
<i>Promotion failed with the following error(s): Cluster node release level for the promotion target is 7200, which does not meet the required release level of 7300. Task "Mutually Exclusive With Self" option requires a minimum promotion target release level of 7300.</i>	Attempt to promote a task with Mutually Exclusive With Self enabled to a target server with a release prior to 7.3.0.0.
<i>Promotion failed with the following error(s): Cluster node release level for the promotion target is 7200, which does not meet the required release of 7300. Universal Template Field 'Extension Status' option requires a minimum promotion target release of 7300.</i>	A Universal Template will be prohibited from being promoted to a release earlier than 7.3.0.0 if any field in the template is defined with Extension Status = true.

Error Message	Diagnosis
<p>Promotion failed with the following error(s): Cluster node release level for the promotion target is 7200, which does not meet the required release of 7300.z/OS Task "SYSTEM or SYSAFF Override Parameter" requires a minimum promotion target release level of 7300 when specified.</p>	<p>A Zos Task with non-empty SYSTEM or SYSAFF Override Parameter will be prohibited from being promoted to a release earlier than UC 7.3.0.0.</p>
<p>Promotion of bundle "bundle-name" failed with the following error(s): Bundle "<bundle-name>" cannot be promoted because Promote Members of Business Services or Visible To is not empty, and Universal Controller property "Promote By Business Service Membership Permitted" is not enabled.</p>	<p>Attempt to promote a bundle with Promote Members of Business Services or Visible To non-empty to a target system where Promote By Business Service Membership property is false. (The target system rejects the promotion).</p> <p>Note: This is applicable only if Promote Bundle Definition = true.</p>
<p>Promotion of bundle "<bundle-name>" with id <bundle-uid> prohibited because the bundle is in use by another Universal Controller process.</p>	<p>Promote Bundle command invoked on the source for a bundle with a bundle id for which another Universal Controller process has already acquired a lock.</p>
<p>Promotion Schedule operation for bundle "<bundle-name>" with id <bundle-uid> prohibited because the bundle is in use by another Universal Controller process.</p>	<p>Schedule Promotion command requires the bundle id lock, but another Universal Controller process has already acquired that lock.</p>
<p>Promotion target "promotion-target-name" has routed the promotion payload to the Active server and the Accept Bundle command continues to run in the background.</p>	<p>Upon receiving the promotion payload, the promotion target determined it was a Passive server and routed the payload to the Active server, where the Accept Bundle command will run, however, the Accept Bundle command did not complete within approximately 2 minutes.</p> <p>The Accept Bundle command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.</p>
<p>Promotion to an earlier release only supported for target releases starting with 6300.</p>	<p>Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.</p>
<p>Protocol <protocol name> is not allowed since it is being excluded by Universal Controller property "File Transfer Task Exclude Protocols".</p>	<p>Attempt to promote a File Transfer Task that has a protocol currently being excluded by the target server.</p>
<p>Protocol <protocol name> is not allowed since it is being excluded by Universal Controller property "FTP File Monitor Task Exclude Protocols".</p>	<p>Attempt to promote an FTP File Monitor Task that has a protocol currently being excluded by the target server.</p>
<p>Recurring Task "Override Variables" delimited name/value pairs, when exceeds the combined maximum of 4000 characters, requires a minimum promotion target release of 7100.</p>	<p>Attempt to promote a Recurring Task with Override Variables delimited name/value pairs that exceeds the combined maximum of 4000 characters to a Promotion Target release that is not 7.1.0.0 or higher.</p>
<p>Remote File Monitor "Server Type" option "FTPES" requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Remote File Monitor with Server Type = FTPES to a release earlier than 7.2.0.0.</p>
<p>Remote File Monitor "Authenticate Peer" option requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Remote File Monitor with Authenticate Peer = true to a release earlier than 7.2.0.0.</p>
<p>Remote File Monitor "Verify Host Name" option requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Remote File Monitor with Verify Host Name = true to a release earlier than 7.2.0.0.</p>
<p>SAP Connection "Client" option requires a minimum promotion target release level of 6700.</p>	<p>Attempt to promote an SAP Connection to a release prior to 6.7.0.0 when the Connection Type is Load Balancing and a Client is specified.</p>
<p>SAP Task "<job-id-field-name>" requires a minimum promotion target release level of 6450 when unspecified.</p>	<p>Attempt to promote an SAP Task with an unspecified SAP Job ID field to a pre-6.4.5.0 release of the Controller.</p>

Error Message	Diagnosis
<i>Script "<script-name>" cannot be promoted because scripts are not permitted; Universal Controller property "Windows/Linux Scripts Permitted" is not enabled.</i>	Attempt to promote a Script Script Type from a source server to a target server, where the target server is configured with the Windows/Linux Scripts Permitted Universal Controller system property set to false.
<i><task-type> Task "Exit Codes" requires a minimum promotion target release level of 6700 when unresolved.</i>	Attempt to promote a task with an unresolved Exit Codes field to a release prior to 6.7.0.0.
<i><task-type> Task "Retry Exit Codes" requires a minimum promotion target release level of 6700 when unresolved.</i>	Attempt to promote a task with an unresolved Retry Exit Codes field to a release prior to 6.7.0.0.
<i>Unable to promote {APPLICATION: Windows Service} with name "<application-name>" and id 0f84fbb388c04bd09a2c7d5a0ac06c70 because an application cannot be promoted with a name change while generated application control tasks are being excluded.</i>	Attempt to promote an Application with a name change while excluding generated Application Control Tasks .
<i>Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is referenced by one or more Universal Tasks.</i>	Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Task requires it to remain a Resolvable type.
<i>Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is specified as a default value for one or more Universal Template Fields.</i>	Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Template Field default value requires it to remain a Resolvable type.
<i>Unable to promote <credential-type> credential "<credential-name>" since original Web Service credential is referenced by one or more Web Service Tasks.</i>	Attempt to promote a Credential that has been converted from a Web Service type and at least one reference on the target system by a Web Service Task requires it to remain a Web Service type.
<i>Unable to promote {CUSTOM DAY} with name "<custom-day-name>" and id 343f68c60cef48279647a45055349c47 because global custom days are not permitted; Universal Controller property "Custom Day Global Permitted" is not enabled.</i>	Attempt to promote a global Custom Day when the Custom Day Global Permitted system property is set to false .
<i>Unable to promote {SCRIPT: Web Service Payload} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e since original {SCRIPT: Data} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e is referenced by one or more Universal Tasks.</i>	Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Task (unless all references are included in the promotion payload).
<i>Unable to promote {SCRIPT: Script} with name "Data1.txt" and id c78a9fe3748549808ac5f6248eb4bcc2 since original {SCRIPT: Data} with name "Data1.txt" and id 4d7d06e87aef4461aeabbb21191b4c61 is specified as a default value for one or more Universal Template Fields.</i>	Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Template (via Universal Template Field).
<i>Unable to promote {TASK: Application Control} with name "<application-name> #QUERY#" and id e9632e6024324d619b3122832e84c8b0 because a generated application control task cannot be promoted with a name change while applications are being excluded.</i>	Attempt to promote a generated Application Control Tasks with a name change while excluding Application .
<i>Unable to promote {TASK: Universal} with name "<Task Name>" and id <Task UUID> since the built-in Universal Template with name "<Template Name>" and <Template UUID> has changed; Universal Controller property "Reconcile Built-in Universal Template Changes On Promotion" is not enabled.</i>	Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template differs from the original built-in Universal Template on the Promotion Target.
<i>Universal Monitor "Universal Task Publisher Variables" requires a minimum promotion target release level of 7300 when specified.</i>	Attempt to promote a Universal Monitor Task with non-empty Universal Task Publisher Variables will be prohibited from being promoted to a release earlier than UC 7.3.0.0.
<i>Universal Task "<field label>" option requires a minimum promotion target release level of 7200.</i>	Attempt to promote a Universal Task with a non-blank Large Text Field 3 or Large Text Field 4 to a Universal Controller release prior to 7200.
<i>Universal Task "<field label>", when greater than 4000 characters, requires a minimum promotion target release level of 7200.</i>	Attempt to promote a Universal Task with a Large Text field 1 or Large Text field 2 with value greater than 4000 to a Universal Controller release prior to 7200.

Error Message	Diagnosis
<p><i>Universal Task "Universal Template" with built-in universal template reference requires a minimum promotion target release level of 6800.</i></p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template to a Promotion Target release that is not 6.8.0.0 or higher.</p>
<p><i>Universal Template "<template-name>" cannot be promoted because [it is a new template / the template has changed] and the promotion was performed without the "Allow Universal Template Changes" option enabled. Universal Template changes must be promoted by a user with either the "ops_universal_template_admin" role or the "ops_admin" role and with the Allow Universal Template Changes option enabled.</i></p>	<p>Attempt to promote a new or changed Universal Template without proper authorization or with proper authorization but without proper option usage.</p>
<p><i>Universal Template "<template-name>" cannot be promoted because [it is a new template / the template has changed] and the promotion user does not have either the "ops_universal_template_admin" role or the "ops_admin" role required to perform the promotion with the "Allow Universal Template Changes" option enabled.</i></p>	<p>Attempt to promote a new or changed Universal Template without proper authorization (on Promotion Target) but with proper option usage.</p>
<p><i>Variable "Value", when greater than 4000 characters, requires a minimum promotion target release level of 7100.</i></p>	<p>Attempt to promote a variable greater than 4000 character to a Promotion Target release that is not 7.1.0.0 or higher.</p>

7 Preparing Bundles for Promotion

Your user ID must have the [ops_bundle_admin](#) role, or be granted Bundle permissions, to use this feature.

7.1 Overview

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

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

For each method, you can manually [add additional records](#) to a Bundle after it has been created.

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

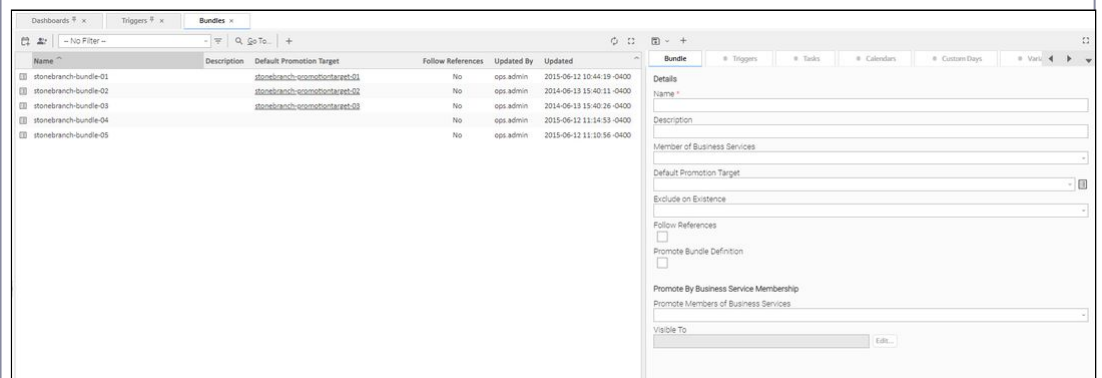
7.1.1 Creating a Bundle for Promotion by Selecting Individual Records




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

Step 1

From the [Bundles & Promotion](#) navigation pane, select **Bundles**. The Bundles list displays.

To the right of the list, Bundle Details for a new Bundle record displays.



Step 2	Enter / select Details for a new Bundle, using the field descriptions below as a guide. (The only required field is Name . You do not have to select a Default Promotion Target; you can select (or override) a promotion target when you promote the Bundle .) To display more of the Details fields on the screen, you can either: <ul style="list-style-type: none"> • Use the scroll bar. • Temporarily hide the list above the Details. • Click the  button above the list to display a pop-up version of the Details.
Step 3	Click a  button. The Bundle record is added to the database, and all buttons and tabs in the Bundle Details are enabled.
Step 4	Open the Bundle and begin adding records to the Bundle.
Step 5	Click the  button.

Note

To [open](#) an existing record on the list, either:

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

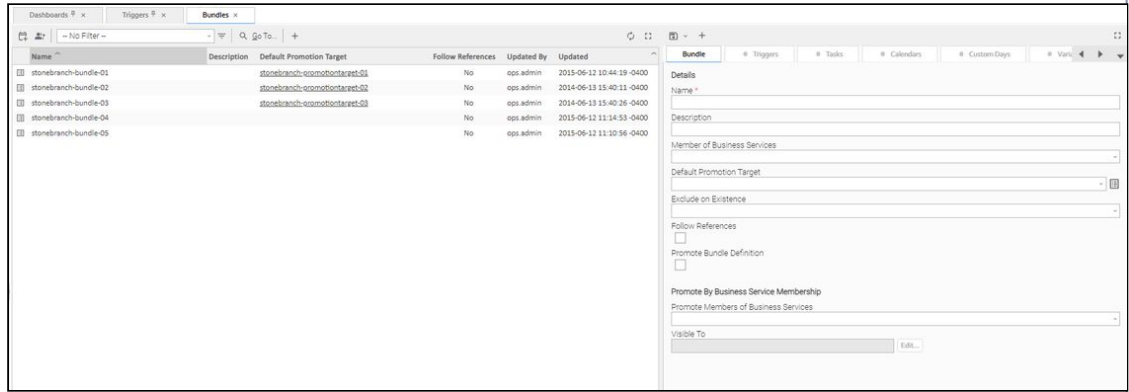
7.1.2 Creating a Bundle for Promotion by Date

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

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

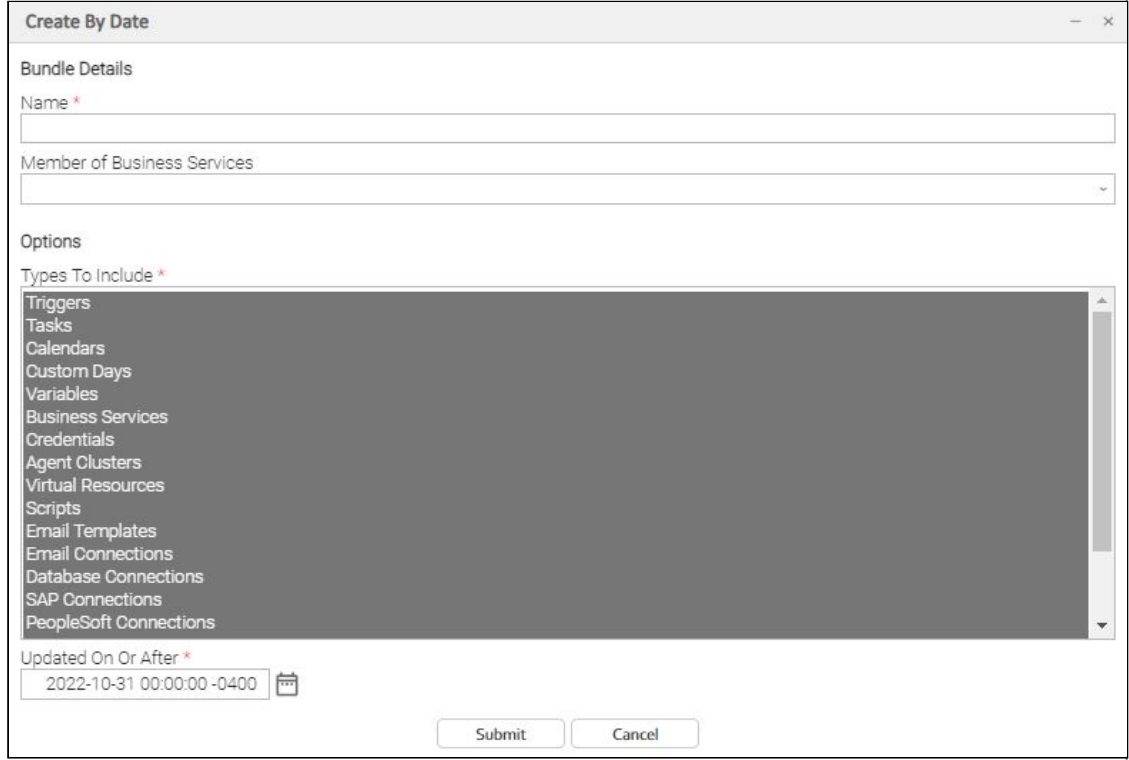
Step 1

From the **Bundles & Promotion** navigation pane, select **Bundles**. The Bundles list displays.



Step 2

Click the **Create By Date** button at the top of the list. The Create By Date pop-up displays.




Step 3

The **Types To Include** drop-down list pre-selects all record types (by highlighting them in blue). Use Ctrl+click to de-select any record type for records that you do not want in the Bundle.

Note
Only records for record types that you have [permission](#) to Read will be included in the bundle.

Step 4

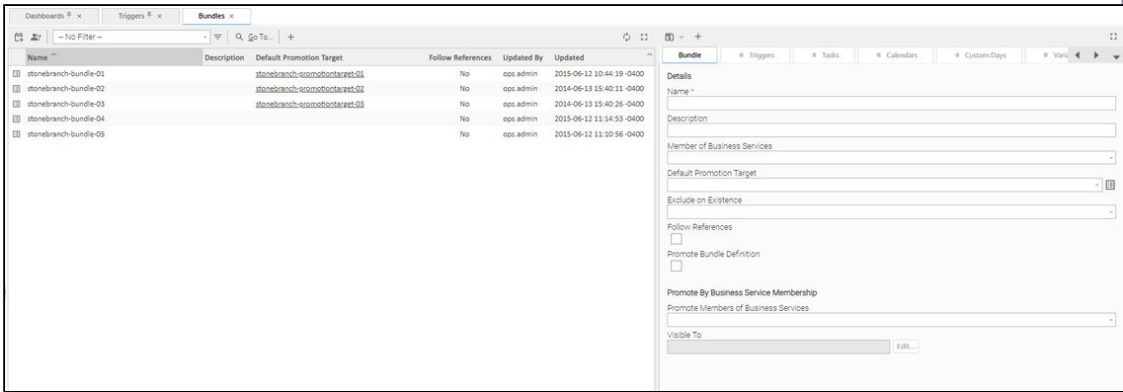
The **Updated On Or After** field specifies the current date, by default. You can change the date manually or by clicking the Calendar icon. All records created or updated on or after the date that you specify will be included in the bundle.


<p>Step 5</p>	<p>Enter a Name and, optionally, select one more Business Services that this Bundle will be a member of. Then click the Submit button. If any records qualified for inclusion in the Bundle, the Bundle is created, saved to the database, and the Bundle Details display below the list. However, if no records qualified according to the specified date, the Bundle is not saved.</p>
<p>Step 6</p>	<p>You then can open the Bundle and enter / select additional Details for the Bundle, using the field descriptions below as a guide.</p> <ul style="list-style-type: none"> • Required fields display an asterisk (*) after the field name. • Default values for fields, if available, display automatically. <p>To display more of the Details fields on the screen, you can temporarily hide the list.</p>
<p>Step 7</p>	<p>As desired, you also can add any additional records to (or remove any included records from) the Bundle.</p>
<p>Step 8</p>	<p>Click the  button.</p>

7.1.3 Creating a Bundle for Promotion by Business Services

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

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

<p>Step 1</p>	<p>From the Bundles & Promotion navigation pane, select Bundles. The Bundles list displays.</p> 
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<p>Step 2</p>	<p>Click the Create Bundle By Business Service button at the top of the list. The Create Bundle By Business Service pop-up displays.</p> <div data-bbox="424 304 1544 1025" style="border: 1px solid black; padding: 5px;"> <p>Create By Business Service - x</p> <p>Bundle Details</p> <p>Name * <input type="text"/></p> <p>Member of Business Services <input type="text"/></p> <p>Options</p> <p>Types To Include *</p> <div style="border: 1px solid gray; padding: 2px;"> <ul style="list-style-type: none"> Triggers Tasks Calendars Variables Credentials Agent Clusters Virtual Resources Scripts Email Templates Email Connections Database Connections SAP Connections PeopleSoft Connections SNMP Managers </div> <p>Business Services To Include * <input type="text"/></p> <p style="text-align: right;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </p> </div>
<p>Step 3</p>	<p>In the Member of Business Services field, specify Business Service memberships for the Bundle being created. Otherwise, if your Bundle permissions are limited to specific Business Services, you may not be able to create the Bundle.</p>
<p>Step 4</p>	<p>The Types To Include drop-down list pre-selects all record types (by highlighting them in blue) for records that can belong to Business Services. Use Ctrl+click to de-select any record type for records that you do not want in the Bundle.</p> <div data-bbox="424 1290 1544 1447" style="border: 2px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>Only records for record types that you have permission to Read will be included in the bundle.</p> </div>
<p>Step 4</p>	<p>In the Business Services To Include field, select one or more Business Services whose records you want to include in the Bundle.</p>
<p>Step 5</p>	<p>Enter a Name and, optionally, select one more Business Services that this Bundle will be a member of. Then click the Submit button. If any records qualified for inclusion in the Bundle, the Bundle is created, saved to the database, and the Bundle Details display below the list. However, if no records qualified according to the specified Business Service(s), the Bundle is not saved.</p>
<p>Step 6</p>	<p>You then can open the Bundle and enter / select additional Details for the Bundle, using the field descriptions below as a guide.</p> <ul style="list-style-type: none"> • Required fields display an asterisk (*) after the field name. • Default values for fields, if available, display automatically. <p>To display more of the Details fields on the screen, you can temporarily hide the list.</p>
<p>Step 7</p>	<p>As desired, you also can add any additional records to (or remove any included records from) the Bundle.</p>
<p>Step 8</p>	<p>Click the  button.</p>

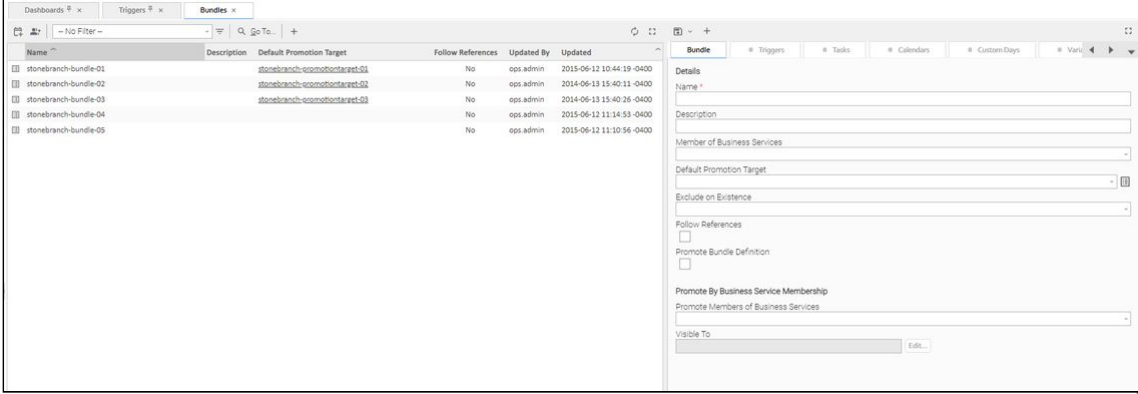
7.1.4 Promoting Bundles by Business Service Membership



Note

You can promote a Bundle by Business Service Membership only if the [Promote By Business Service Membership](#) Universal Controller system property is set to true (the default).

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

These records will not be visible from the corresponding Bundle tabs; they will appear only in the Bundle Report, which will identify all records bundled dynamically with a **+** in the **Added By** column.

<p>Step 1</p>	<p>From the Bundles & Promotion navigation pane, select Bundles. The Bundles list displays.</p> <p>Below the list, Bundle Details for a new Bundle record displays. (You also can click the + button to display Bundle Details for a new Bundle.)</p>  <p>The screenshot shows a table with columns: Name, Description, Default Promotion Target, Follow References, Updated By, and Updated. Below the table is a 'Bundle Details' form with fields for Name, Description, Member of Business Services, Default Promotion Target, Exclude on Existence, Follow References, Promote Bundle Definition, Promote By Business Service Membership, and Visible To.</p>
<p>Step 2</p>	<p>Enter / select Details for a new Bundle, using the field descriptions below as a guide.</p> <p>(The only required field is Name. You do not have to select a Default Promotion Target; you can select (or override) a promotion target when you promote the Bundle.)</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>If you view Bundle Details for an existing Bundle by clicking a Bundle in the list, and then want to create a new Bundle record, you must click the + button that displays above and below the Details.</p> </div>
<p>Step 3</p>	<p>Select one or more Business Services from the Promote Members of Business Services drop-down list.</p>
<p>Step 4</p>	<p>In the Visible To field, select a User to which all records being promoted by Business Service membership must be visible. Any qualifying record that is a member of the specified Business Service(s) but is not visible to the specified user will not be promoted.</p>

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

7.1.5 Bundle Details

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

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

7.1.5.1 Bundle Details Field Descriptions

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

Field Name	Description
------------	-------------

Details	This section contains detailed information about the Bundle.
Name	Name for this bundle.
Description	Description of this record. (Maximum = 255 characters.)
Member of Business Services	<p>User-defined; Allows you to select one or more Business Services that this record belongs to. (You also can Check All or Uncheck All Business Services for this record.)</p> <p>You can select up to 62 Business Services for any record type, and enter a maximum of 2048 characters for each Business Service.</p> <p>If the Business Service Visibility Restricted Universal Controller system property is set to true, depending on your assigned (or inherited) Permissions or Roles, Business Services available for selection may be restricted.</p>
Default Promotion Target	<p>Allows you to browse for and select a Promotion Target, which you defined using the Promotion Targets feature.</p> <p>If you do not specify a default promotion target, you will be prompted for a target when performing a promotion of the bundle.</p>
Exclude on Existence	<p>Record types in the promotion payload that will not be updated if they exist on the target server. You can:</p> <ul style="list-style-type: none"> • Select one or more record types from the drop-down list. • Click Check All above the list to select all record types. • Click Uncheck All above the list to de-select all record types. <p>For new Bundles, the Bundle Exclude On Existence Picker Default Universal Controller system property specifies which record types, if any, will be selected by default.</p>
Follow References	<p>Specification for whether or not to dynamically include items that are referenced by bundled item definitions, including items being promoted as members of Business Services.</p> <p>For example, if you bundle an Email Task and enable the Follow References field, the Email Connection and/or Email Template referenced by the Email Task will be included in the promotion operation. If you bundle a Trigger and enable the Follow References option, the Task(s) and Calendar referenced by the Trigger will be included in the promotion. Tasks within a bundled Workflow are included in the promotion regardless of the Follow Reference option. Custom Days that are defined within a bundled Calendar are included in the promotion regardless of the Follow Reference option as well.</p> <p>(The information included is similar to the information included in an XML export with references.)</p> <div style="border: 1px solid orange; padding: 10px; margin: 10px 0;"> <p>If Promotion Follow References Permitted property is false but follow reference = true for a bundle or promoting a workflow, etc, the checkbox will be visible. The user must set follow reference = false before promoting or enable the system property to true. The same will be applicable for scheduled promotions.</p> </div> <p>See Records Promoted When Follow References is Selected or Not Selected.</p>
Promote Bundle Definition	Enable this option to promote the Bundle Details, along with the Bundle itself, when promoting the Bundle.

<p>Promote By Business Service Membership</p>	<p>This section contains detailed information for promoting the Bundle with records that are members of one or more Business Service and are visible to a specified user.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>This section displays if either:</p> <ul style="list-style-type: none"> • The Promote By Business Service Membership Universal Controller system property is set to true. • Promote Members of Business Services or Visible To field is non-empty. <p>If the Promote By Business Service Membership property is set to false and either the Promote Members of Business Services or Visible To field is non-empty, the section will display. If you update the fields so that they both are empty, the section will disappear.</p> </div>
<p>Promote Members of Business Services</p>	<p>Business Service(s) whose members will be included in the promoted Bundle.</p>
<p>Visible To</p>	<p>User to which all records being promoted by Business Service membership must be visible. Any qualifying record that is a member of the specified Business Service(s) but is not visible to the specified user will not be promoted.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>Records that are visible to a user are records that the user has permission to Read.</p> </div> <p>Default is the last user to update the Promote Members of Business Services field.</p> <p>You can change the specified user by clicking the Edit button next to the Visible To field. An Edit Visible To pop-up dialog displays:</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="background-color: #f0f0f0; padding: 2px;">Edit Visible To - ×</div> <div style="padding: 5px;"> <p>Visible To</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Admin</div> </div> <div style="text-align: right; padding-top: 10px;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </div> </div>

Save & New	Saves a new record in the Controller database and redisplay empty Details so that you can create another new record.
Save & View	Saves a new record in the Controller database and continues to display that record.
New	Displays empty (except for default values) Details for creating a new record.
Update	Saves updates to the record.
Bundle Report	Allows you to generate a report about the current bundle. See Generating a Bundle Report .
Promote Bundle	Allows you to promote this bundle to a target Universal Controller server. See Promoting Bundles and Records to a Target .
Delete	Deletes the current record.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of this record.
Tabs	This section identifies the tabs across the top of the Bundle Details that provide access to additional information about the Bundle.
<record type> tabs	<p>Each tab of the following record types lists the records of that type that belong to this Bundle. An Edit button on each record type list allows you to add records to and remove records from the Bundle (see Adding and Removing Records in a Bundle, below).</p> <ul style="list-style-type: none"> • Triggers • Tasks • Calendars • Custom Days • Variables • Business Services • Credentials • Agent Clusters • Virtual Resources • Scripts • Email Templates • Email Connections • Database Connections • SNMP Managers • SAP Connections • PeopleSoft Connections • Applications • Universal Templates

7.2 Adding and Removing Records in a Bundle

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

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

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

You can add a record to a Bundle from:

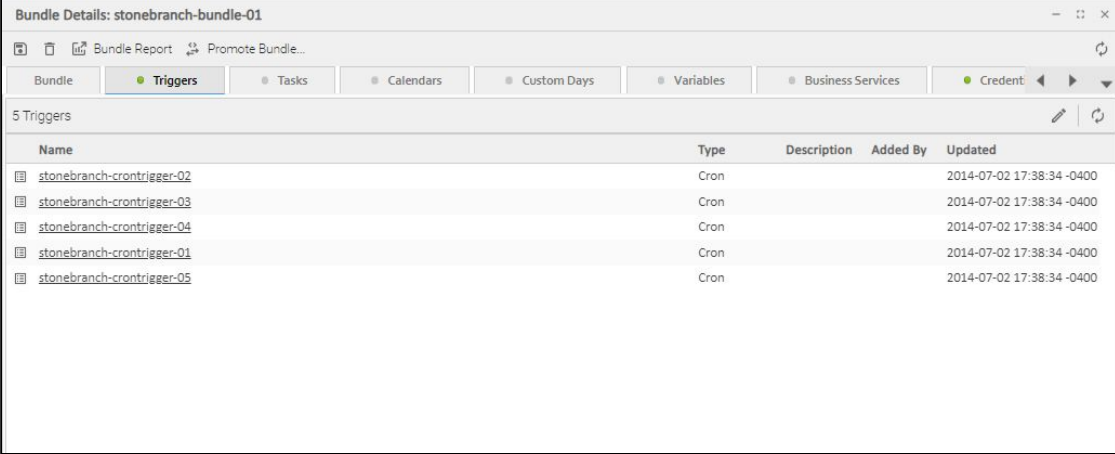
- [Bundle Details](#)
- [Record Details](#)



- [Records List for the record](#)

You can remove a record from a Bundle only from:

- [Bundle Details](#)

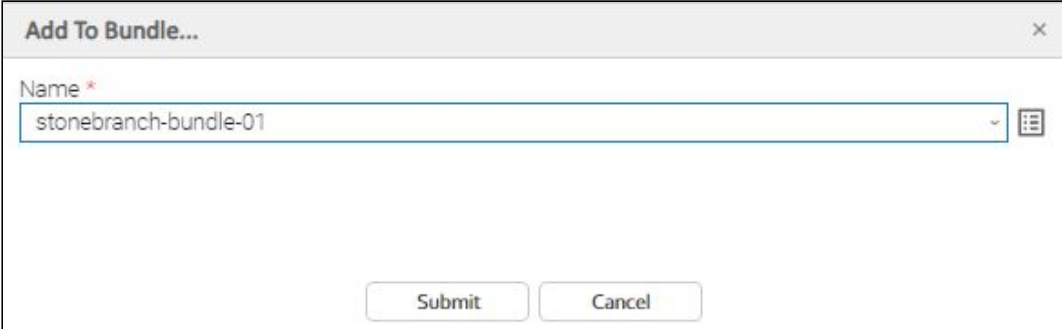
7.2.1 Adding and Removing Records from the Bundle Details

<p>Step 1</p>	<p>Display the Bundle Details of the Bundle to which you want to add records.</p>																														
<p>Step 2</p>	<p>Click a <record type> tab for records that you want to add to the Bundle. A list of all records currently in the Bundle for that type are listed. (If you are adding records to a new Bundle, the list for every record type will be empty.)</p> <p>For example:</p>  <p>The screenshot shows a web interface for 'Bundle Details: stonebranch-bundle-01'. It has a navigation bar with tabs: Bundle, Triggers (selected), Tasks, Calendars, Custom Days, Variables, Business Services, and Credential. Below the tabs, it says '5 Triggers'. A table lists the triggers:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Type</th> <th>Description</th> <th>Added By</th> <th>Updated</th> </tr> </thead> <tbody> <tr> <td>stonebranch-crontrigger-02</td> <td>Cron</td> <td></td> <td></td> <td>2014-07-02 17:38:34 -0400</td> </tr> <tr> <td>stonebranch-crontrigger-03</td> <td>Cron</td> <td></td> <td></td> <td>2014-07-02 17:38:34 -0400</td> </tr> <tr> <td>stonebranch-crontrigger-04</td> <td>Cron</td> <td></td> <td></td> <td>2014-07-02 17:38:34 -0400</td> </tr> <tr> <td>stonebranch-crontrigger-01</td> <td>Cron</td> <td></td> <td></td> <td>2014-07-02 17:38:34 -0400</td> </tr> <tr> <td>stonebranch-crontrigger-05</td> <td>Cron</td> <td></td> <td></td> <td>2014-07-02 17:38:34 -0400</td> </tr> </tbody> </table>	Name	Type	Description	Added By	Updated	stonebranch-crontrigger-02	Cron			2014-07-02 17:38:34 -0400	stonebranch-crontrigger-03	Cron			2014-07-02 17:38:34 -0400	stonebranch-crontrigger-04	Cron			2014-07-02 17:38:34 -0400	stonebranch-crontrigger-01	Cron			2014-07-02 17:38:34 -0400	stonebranch-crontrigger-05	Cron			2014-07-02 17:38:34 -0400
Name	Type	Description	Added By	Updated																											
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stonebranch-crontrigger-04	Cron			2014-07-02 17:38:34 -0400																											
stonebranch-crontrigger-01	Cron			2014-07-02 17:38:34 -0400																											
stonebranch-crontrigger-05	Cron			2014-07-02 17:38:34 -0400																											

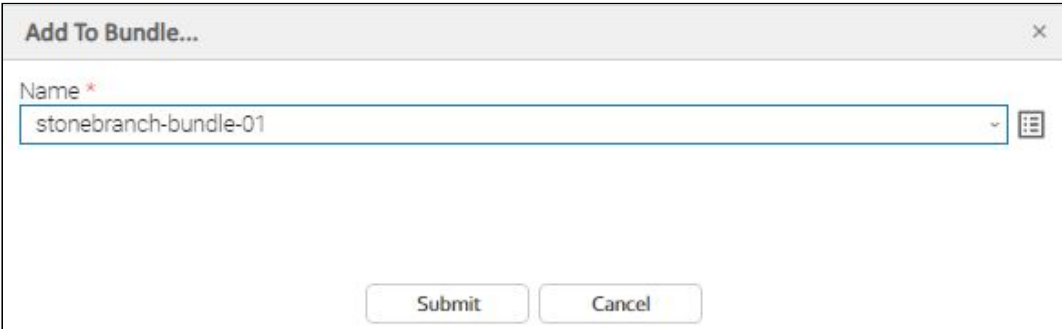
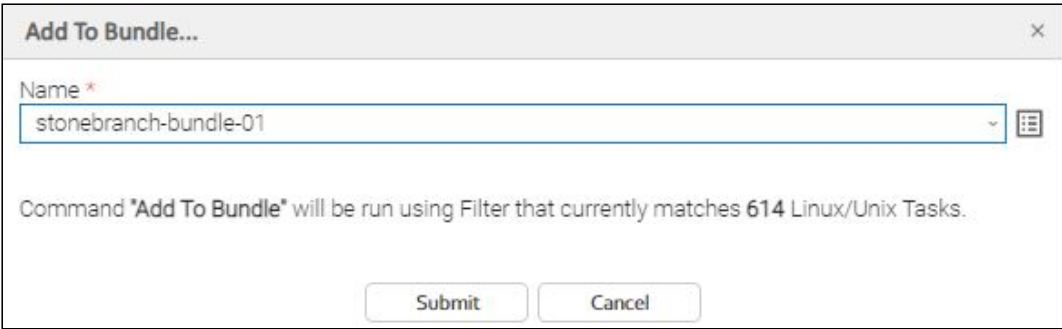
<p>Step 3</p>	<p>Click the  button above the list. An Edit Members pop-up displays that allows you to add records to the Bundle. For example:</p> <div data-bbox="422 331 1544 987" style="border: 1px solid black; padding: 5px;"> <p>Edit Members</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Collection</th> <th style="width: 50%;">Trigger List</th> </tr> </thead> <tbody> <tr> <td>Stonebranch</td> <td>stonebranch-bundle-01</td> </tr> <tr> <td>Name ^</td> <td>Name ^</td> </tr> <tr> <td>stonebranch-applicationmonitortrigger-03</td> <td>stonebranch-crontrigger-01</td> </tr> <tr> <td>stonebranch-applicationmonitortrigger-04</td> <td>stonebranch-crontrigger-02</td> </tr> <tr> <td>stonebranch-applicationmonitortrigger-05</td> <td>stonebranch-crontrigger-03</td> </tr> <tr> <td>stonebranch-compositetrigger-01</td> <td>stonebranch-crontrigger-04</td> </tr> <tr> <td>stonebranch-compositetrigger-02</td> <td>stonebranch-crontrigger-05</td> </tr> <tr> <td>stonebranch-compositetrigger-03</td> <td></td> </tr> <tr> <td>stonebranch-compositetrigger-04</td> <td></td> </tr> <tr> <td>stonebranch-compositetrigger-05</td> <td></td> </tr> <tr> <td>stonebranch-emailmonitortrigger-01</td> <td></td> </tr> <tr> <td>stonebranch-emailmonitortrigger-02</td> <td></td> </tr> <tr> <td>stonebranch-emailmonitortrigger-03</td> <td></td> </tr> <tr> <td>stonebranch-emailmonitortrigger-04</td> <td></td> </tr> <tr> <td>stonebranch-emailmonitortrigger-05</td> <td></td> </tr> </tbody> </table> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </p> </div> <ul style="list-style-type: none"> The Collection window displays all records of this type that have not been added to the Bundle. The Tasks List window displays all records of this type that have been added to the Bundle. 	Collection	Trigger List	Stonebranch	stonebranch-bundle-01	Name ^	Name ^	stonebranch-applicationmonitortrigger-03	stonebranch-crontrigger-01	stonebranch-applicationmonitortrigger-04	stonebranch-crontrigger-02	stonebranch-applicationmonitortrigger-05	stonebranch-crontrigger-03	stonebranch-compositetrigger-01	stonebranch-crontrigger-04	stonebranch-compositetrigger-02	stonebranch-crontrigger-05	stonebranch-compositetrigger-03		stonebranch-compositetrigger-04		stonebranch-compositetrigger-05		stonebranch-emailmonitortrigger-01		stonebranch-emailmonitortrigger-02		stonebranch-emailmonitortrigger-03		stonebranch-emailmonitortrigger-04		stonebranch-emailmonitortrigger-05	
Collection	Trigger List																																
Stonebranch	stonebranch-bundle-01																																
Name ^	Name ^																																
stonebranch-applicationmonitortrigger-03	stonebranch-crontrigger-01																																
stonebranch-applicationmonitortrigger-04	stonebranch-crontrigger-02																																
stonebranch-applicationmonitortrigger-05	stonebranch-crontrigger-03																																
stonebranch-compositetrigger-01	stonebranch-crontrigger-04																																
stonebranch-compositetrigger-02	stonebranch-crontrigger-05																																
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stonebranch-emailmonitortrigger-03																																	
stonebranch-emailmonitortrigger-04																																	
stonebranch-emailmonitortrigger-05																																	
<p>Step 4</p>	<p>To filter the records listed in the Collection window, enter characters in the text field above the Name column. Only records containing that sequence of characters will display in the list.</p>																																
<p>Step 5</p>	<p>To add a record to the Bundle, move the records from the Collection window to the List window:</p> <ol style="list-style-type: none"> 1. To move a single record, double-click it or click it once and then click the > arrow. 2. To move multiple records, Ctrl-click them and then click the > arrow. 3. To move all records, click the > arrow. <p>To remove a record from the Bundle, move the record from the List window to the Collection window:</p> <ol style="list-style-type: none"> 1. To move a single record, double-click it or click it once and then click the < arrow. 2. To move multiple records, Ctrl-click them and then click the < arrow. 3. To move all records, click the < arrow. 																																
<p>Step 6</p>	<p>Click  .</p>																																
<p>Step 7</p>	<p>Repeat the above steps in the appropriate tabs for all records you want to add.</p>																																

7.2.2 Adding a Record to a Bundle from the Record Details

<p>Step 1</p>	<p>Display the list of records containing the record that you want to add to a Bundle.</p>
<p>Step 2</p>	<p>Either right-click the record you want to add or display the Details for that record.</p>


<p>Step 3</p>	<p>Display the Action menu and select Add To Bundle. The Add To Bundle pop-up displays.</p> 
<p>Step 4</p>	<p>Select a Name from the drop-down list and click Submit. The record is added to the Bundle (see Displaying the Bundles List for a Record).</p>

7.2.3 Adding Multiple Records to a Bundle from a Records List

<p>Step 1</p>	<p>Display the list of records containing the records that you want to add to a Bundle.</p>
<p>Step 2</p>	<p>Either:</p> <p>Ctrl-click the records that you want to add to the Bundle, display the Action menu, and select Add To Bundle. The Add To Bundle pop-up displays.</p>  <p>OR</p> <p>On any tasks list, right-click any column header for the list, display the Action menu, and select Run Command On Filtered > Add To Bundle.... The Add To Bundle pop-up displays.</p> 
<p>Step 4</p>	<p>Select a Name from the drop-down list and click Submit. The records are added to the Bundle (see Displaying the Bundles List for a Record).</p>

7.3 Displaying the Bundles List for a Record

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

<p>Step 1</p>	<p>Access the Action menu for the record and select View Bundles. A View Bundles pop-up displays the list of Bundles that the record belongs to.</p> 
<p>Step 2</p>	<p>To view Details for a Bundle on the list, click its Name.</p>

7.4 Reports

Report promotion is introduced in Universal Controller 7.4.0.0. However, if Follow References = false or Promotion Follow Report References = false for a promotion, any report required by a promoted task must already be available on the target system.

If you choose to use List Import/Export for sharing reports between systems:

1. Create the reports on the source system.
2. [List Export](#) the reports.
3. [List Import](#) the reports into the target system.

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

The meta data includes:

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

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

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

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

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

Note

You can disable all Report-related promotion validation on the target system via the [Promotion Validate Report References](#) Universal Controller system property.

7.5 Widgets

[Widget](#) promotion is introduced in Universal Controller 7.4.0.0. However, if `Follow References = false` for a promotion, any widget required by a promoted dashboard must already be available on the target system.

If you choose to use List Import/Export for sharing widgets between systems:

1. Create the widgets on the source system.
2. [List Export](#) the widgets.
3. [List Import](#) the widgets into the target system.

If a [dashboard](#) contains a reference to a specific widget by id, the promotion payload will include widget meta data to allow for proper validation and potential remapping of the widget reference on the target system.

The meta data includes:

- Widget id
- Widget name
- Widget type

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

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

Using the widget metadata, the Controller will attempt to find a widget on the target system with the same name and same type.

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

8 Generating a Bundle Report

8.1 Introduction

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

Note

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

8.2 Generating a Report

To generate the report:

Step 1

From the [Bundles & Promotion](#) navigation pane, select **Bundles**. The Bundles list displays.

The screenshot shows the 'Bundles' page in the Universal Controller interface. The main area contains a table with the following data:

Name	Description	Default Promotion Target	Follow References	Updated By	Updated
stonebranch-bundle-01	stonebranch-cpmotocartest-01	stonebranch-cpmotocartest-01	No	ops.admin	2015-06-12 10:44:19 -0400
stonebranch-bundle-02	stonebranch-cpmotocartest-02	stonebranch-cpmotocartest-02	No	ops.admin	2014-06-13 15:40:11 -0400
stonebranch-bundle-03	stonebranch-cpmotocartest-03	stonebranch-cpmotocartest-03	No	ops.admin	2014-06-13 15:40:26 -0400
stonebranch-bundle-04	stonebranch-cpmotocartest-04	stonebranch-cpmotocartest-04	No	ops.admin	2015-06-12 11:14:53 -0400
stonebranch-bundle-05	stonebranch-cpmotocartest-05	stonebranch-cpmotocartest-05	No	ops.admin	2015-06-12 11:10:56 -0400

The right-hand side of the interface shows a 'Details' panel for a selected bundle, with fields for Name, Description, Member of Business Services, Default Promotion Target, Exclude on Existence, Follow References, Promote Bundle Definition, Promote By Business Service Membership, and Visible To.

Step 2

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

Bundle Details: stonebranch-bundle-01

Bundle Report Promote Bundle...

Bundle Triggers Tasks Calendars Custom Days Variables Business Services Credent

Details

Name *
stonebranch-bundle-01

Description

Member of Business Services

Default Promotion Target
stonebranch-promotiontarget-01

Exclude on Existence

Follow References

Promote Bundle Definition

Promote By Business Service Membership

Promote Members of Business Services
QA Department

Visible To
ops.admin Edit...

A Bundle Report displays for that Bundle.

Dashboards Bundles Bundle Report: stonebranch-bundle-01

stonebranch-bundle-01 Details

Name	stonebranch-bundle-01
Description	
Member of Business Services	
Default Promotion Target	stonebranch-promotiontarget-01
Exclude on Existence	
Follow References	None
Promote Bundle Definition	None
Promote Members of Business Services	QA Department
Visible To	ops.admin

496 Bundled Items

Name	Type	Description	Added By
Triggers (9)			
Tasks (357)			
Applications (3)			
Calendars (3)			
Custom Days (8)			
Business Services (1)			
Credentials (134)			
Scripts (1)			

Print

Note

If the Promotion Bundle Definition and Follow References fields are checked on the Bundle, the Bundle Report includes any Business Services that the Bundle is a member of.

Note

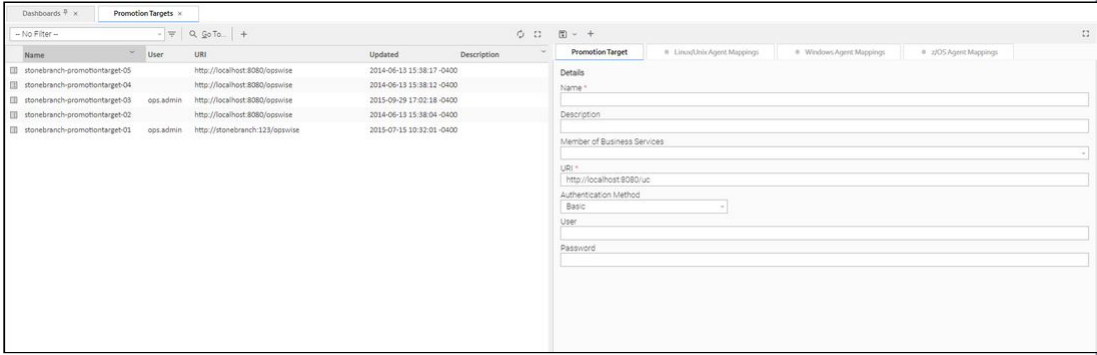


Added By column information:

	<ul style="list-style-type: none"> • Records included in the promotion that were added directly to the Bundle have a user id in the Added By column. • Records included in the promotion dynamically as Tasks within a Workflow, Custom Days within a Calendar, or, when the Follow References field is enabled, the records referenced by the bundled records, have an asterisk (*) in the Added By column. (See Records Promoted When Follow References is Selected or Not Selected.) • Records included in the promotion dynamically when the Bundle is promoted by Business Service membership have a plus sign (+) in the Added By column.
Step 3	If you want to print the report, click the Print button at the bottom of the report.

9 Creating Promotion Targets

9.1 Creating a Promotion Target

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

<p>Step 1</p>	<p>From the Bundles & Promotion navigation pane, select Promotion Targets. The Promotion Targets list displays a list of existing Promotion Targets.</p> <p>To the right of the list, Promotion Target Details for a new Promotion Target record displays.</p>  <p>The screenshot shows a web interface with a table of Promotion Targets. The table has columns for Name, User, URI, Updated, and Description. Below the table is a 'Promotion Target' details form with fields for Name, Description, Member of Business Services, URI, Authentication Method, User, and Password. Some fields have asterisks indicating they are required.</p>
<p>Step 2</p>	<p>Enter / select Details for a new Promotion Target, using the field descriptions below as a guide.</p> <ul style="list-style-type: none"> • Required fields display an asterisk (*) after the field name. • Default values for fields, if available, display automatically. <p>To display more of the Details fields on the screen, you can either:</p> <ul style="list-style-type: none"> • Use the scroll bar. • Temporarily hide the list above the Details. • Click the  button above the list to display a pop-up version of the Details.
<p>Step 3</p>	<p>Click a  button. The Promotion Target record is added to the database, and all buttons and tabs in the Promotion Target Details are enabled.</p>

Note

To [open](#) an existing record on the list, either:

- Click a record in the list to display its record Details below the list. (To clear record Details below the list, click the **New** button that displays above and below the Details.)
- Clicking the [Details icon](#) next to a record name in the list, or right-click a record in the list and then click **Open** in the [Action menu](#) that displays, to display a pop-up version of the record Details.

- Right-click a record in the a list, or open a record and right-click in the record Details, and then click **Open In Tab** in the [Action menu](#) that displays, to display the record Details under a new tab on the record list page (see [Record Details as Tabs](#)).

9.2 Promotion Target Details

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

The screenshot shows a web interface for 'Promotion Target Details: stonebranch-promotiontarget-01'. At the top, there are buttons for 'View Target Server Info' and 'Refresh Target Agents'. Below these are three tabs: 'Promotion Target' (selected), 'Linux/Unix Agent Mappings', 'Windows Agent Mappings', and 'z/OS Agent Mappings'. The 'Details' section contains the following fields:

- Name ***: stonebranch-promotiontarget-01
- Description**: (empty text box)
- Member of Business Services**: (empty dropdown menu)
- URI ***: http://stonebranch:123/opswise
- Authentication Method**: Basic (dropdown menu)
- User**: ops.admin
- Password**: (masked with asterisks)

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

9.2.1 Promotion Target Details Field Descriptions

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

Field Name	Description
Details	This section contains detailed information about the Promotion Target.
Name	Name for this Production Target.
Description	Description of this record. (Maximum = 255 characters.)

Member of Business Services	<p>User-defined; Allows you to select one or more Business Services that this record belongs to. (You also can Check All or Uncheck All Business Services for this record.)</p> <p>You can select up to 62 Business Services for any record type, and enter a maximum of 2048 characters for each Business Service.</p> <p>If the Business Service Visibility Restricted Universal Controller system property is set to true, depending on your assigned (or inherited) Permissions or Roles, Business Services available for selection may be restricted.</p>
URI	<p>Uniform Resource Identifier (URI) used to locate the Promotion Target cluster node.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>By default, the URI of the cluster node that you are logged into displays. You must change this to the URI of a target cluster node, using the default URI format.</p> </div>
User	Login ID on the target cluster node of Universal Controller.
Password	Login password on the target cluster node of Universal Controller.
Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Promotion Target Details that let you perform various actions.
Save	Saves a new record in the Controller database.
Save & New	Saves a new record in the Controller database and redisplayes empty Details so that you can create another new record.
Save & View	Saves a new record in the Controller database and continues to display that record.
New	Displays empty (except for default values) Details for creating a new record.
Update	Saves updates to the record.
Server Info	Displays a Remote Server Information pop-up that contains details about the cluster node identified in this record.
Refresh Target Agents	Accesses the specified Universal Controller server and fetches all Agent records. For details, see Specifying Agent Mapping .
Delete	Deletes the current record.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of this record.

Tabs	This section identifies the tabs across the top of the Promotion Target Details that provide access to additional information about the Bundle.
<Agent-type> Mappings	Lists all Agent mapping instructions between the source and target Controllers. See Specifying Agent Mapping .

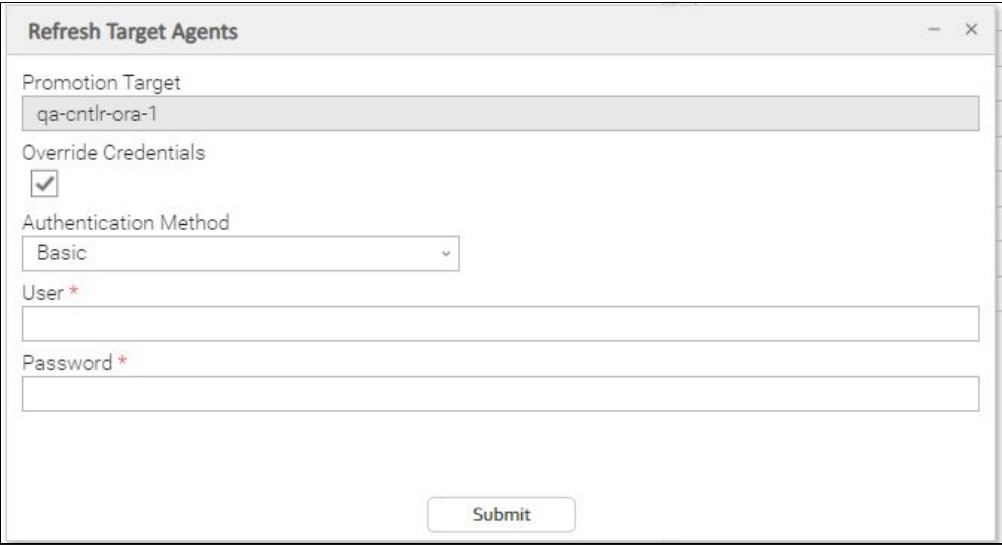
10 Specifying Agent Mapping

10.1 Specifying Agent Mapping

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

The process consists of:

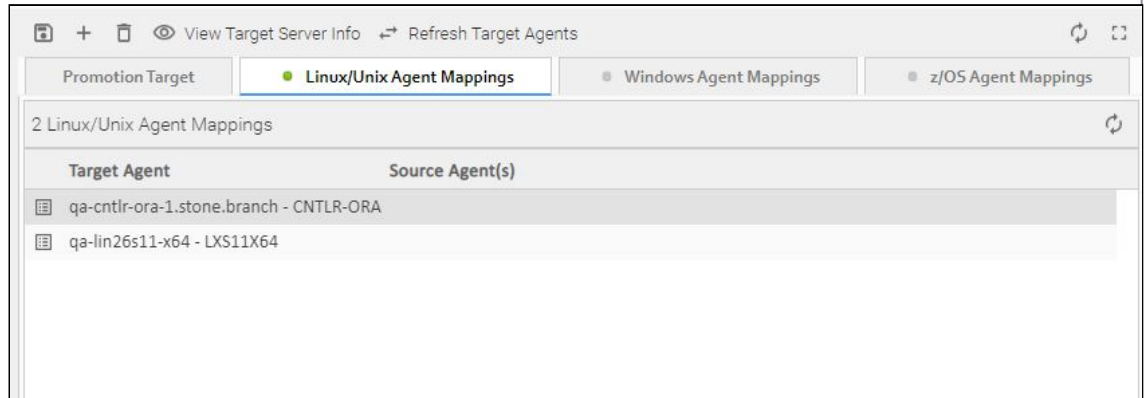
- Instructing the Controller to fetch the list of Agents on the target machine.
- Manually identifying how each Agent should be mapped.

<p>Step 1</p>	<p>Access the Action menu for a Promotion Target record.</p>
<p>Step 2</p>	<p>Click Refresh Target Agents. The Refresh Target Agents pop-up displays.</p> 
<p>Step 3</p>	<p>If the Promotion Target record does not provide the login credentials (User and Password, or Personal Access Token) for the target machine, you must enter them.</p> <p>If the Promotion Target record does provide login credentials, but you want to override them, click Override Credentials. Select Basic and enter a User and Password or select Access Token and enter a Personal Access Token.</p>
<p>Step 4</p>	<p>Click Submit. The Controller logs in to the target machine specified in the Promotion Target record URI field, accesses the appropriate tables, sorts the Agents into Agent types, and lists them in the appropriate <Agent-type> Mappings tab of the Promotion Target record.</p>

Step 5

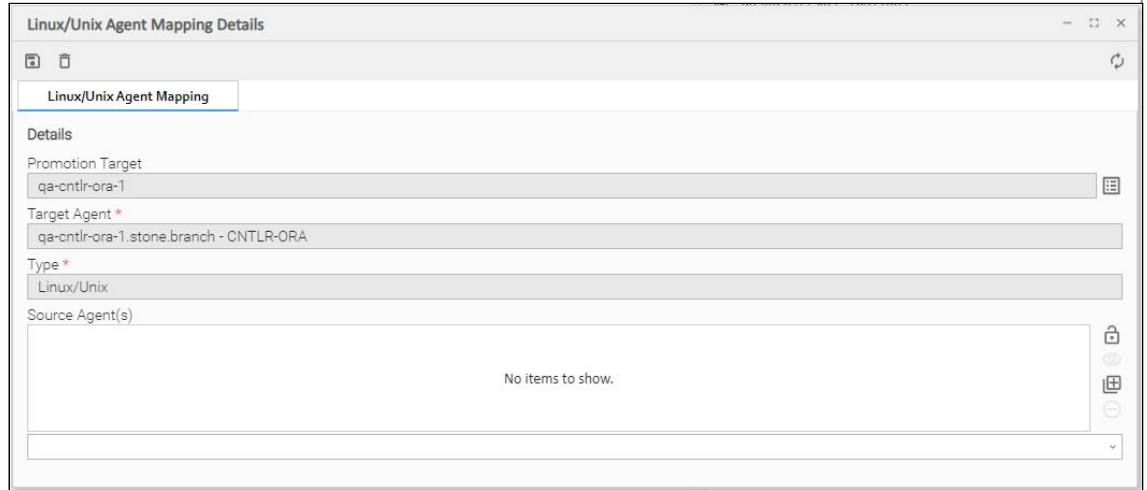
Open the Promotion Target record for which you have just refreshed Agents and click an Agent Mappings tab for which there are Agents on the target machine.

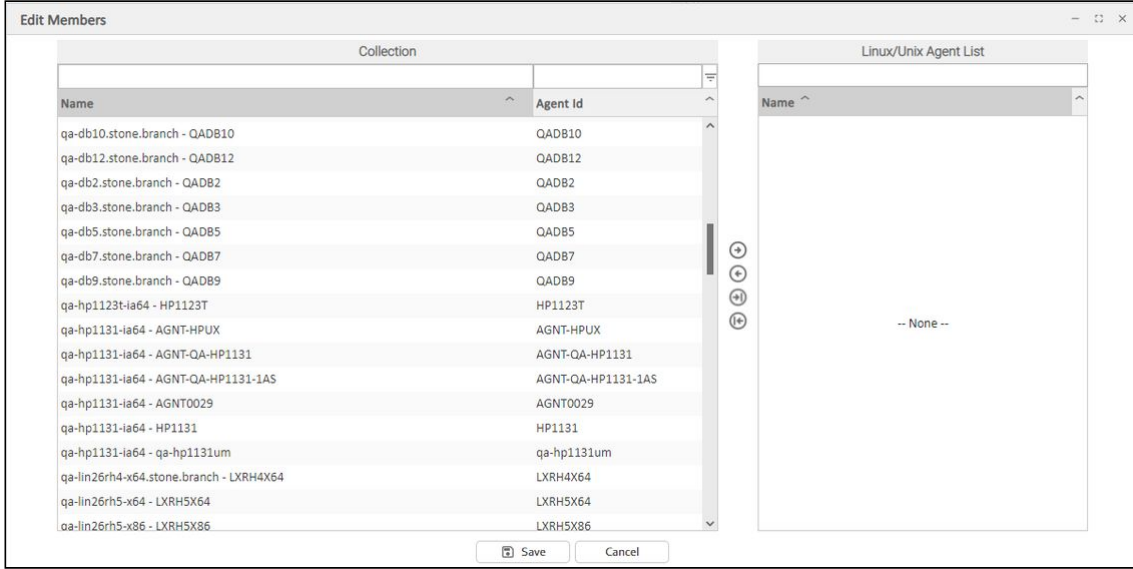
The following example shows a list of Linux/Unix Agents on a target machine:



Step 6

Click the Details icon next to a Target Agent name to display Agent Mapping Details for that Target Agent.



<p>Step 7</p>	<p>In the Source Agent field, click the Add-Remove Multiple icon to display an Edit Members dialog.</p>  <ul style="list-style-type: none"> • The Collection window displays all Agents of this type on the source machine that have not been mapped to the selected Target Agent. • The Agents List windows displays all Agents of this type on the source machine that have been mapped to the selected Target Agent.
<p>Step 8</p>	<p>To filter the Agents listed in the Collection window, enter characters in the text field above the Name column. Only Agents containing that sequence of characters will display in the list.</p>
<p>Step 9</p>	<p>To map an Agent, move the it from the Collection window to the List window:</p> <ol style="list-style-type: none"> 1. To move a single Agent, double-click it or click it once and then click the > arrow. 2. To move multiple Agents, Ctrl-click them and then click the > arrow. 3. To move all Agents, click the > arrow. <p>To un-map an Agent, move it from the List window to the Collection window:</p> <ol style="list-style-type: none"> 1. To move a single Agent, double-click it or click it once and then click the < arrow. 2. To move multiple Agents, Ctrl-click them and then click the < arrow. 3. To move all Agent, click the < arrow.
<p>Step 10</p>	<p>Click Save.</p>
<p>Step 11</p>	<p>Repeat Steps 6 to 10 for each Agent listed in the selected Agent Mappings tab and for all Agents listed in any other Agent Mappings tabs.</p> <p>For best results, you should make sure all the Agents on your source machine are mapped to an Agent on the target machine. You can map as many source Agents to a single target Agent as needed. Once you have specified the mapping for all your source Agents, you can easily promote Bundles or individual records to this Promotion Target. When you promote records (via Bundle or individually) to the target machine, the target Agent will replace the source Agent.</p>

10.1.1 Refresh Agent Error Messages

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

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

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

11 Promoting Bundles and Records to a Target

To use this feature, the user logged into the source Controller must have the [ops_promotion_admin](#) role, or be granted permission to the Promote command and execute permission to one or more promotion targets.

11.1 Overview

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

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

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

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

Note

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

11.2 Promoting a Bundle

Step 1

From the [Lifecycle Management](#) navigation pane, select **Bundles**. The Bundles list displays.

The screenshot shows the Universal Controller interface with the Bundles list displayed. The list has the following columns: Name, Description, Default Promotion Target, and Follow Reference. The details pane on the right shows the configuration for a selected bundle.

Name	Description	Default Promotion Target	Follow Reference
stonebranchbundle-01			No
stonebranchbundle-02			No
stonebranchbundle-03			No
stonebranchbundle-04			No
stonebranchbundle-05			No

The details pane on the right includes the following fields and options:

- Name ***: Text input field
- Description**: Text input field
- Member of Business Services**: Dropdown menu
- Default Promotion Target**: Dropdown menu
- Exclude on Existence**: Checkmark and dropdown menu
- Follow References**: Checkmark
- Promote Bundle Definition**: Checkmark
- Promote By Business Service Membership**: Checkmark
- Promote Members of Business Services**: Dropdown menu
- Visible To**: Text input field with an **Edit...** button

<p>Step 2</p>	<p>Locate the Bundle that you want to promote and either:</p> <ul style="list-style-type: none"> • Right-click the Bundle on the list to display an Action menu and click Promote Bundle... • Open the Bundle record and either click the Promote Bundle... button or access the Action menu and click Promote Bundle... <p>The Promote Bundle pop-up dialog displays.</p> <div data-bbox="427 416 1549 1576" style="border: 1px solid black; padding: 10px;"> <p>Promote Bundle... ✕</p> <p>Promotion Target * <input type="text" value=""/></p> <p>Override Credentials <input checked="" type="checkbox"/></p> <p>Authentication Method <input type="text" value="Basic"/></p> <p>User * <input type="text" value=""/></p> <p>Password * <input type="text" value=""/></p> <p>Allow Universal Template Changes <input type="checkbox"/></p> <p>Schedule <input type="checkbox"/></p> <p style="text-align: center;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </p> </div>
<p>Step 3</p>	<p>If the selected Bundle record specifies a Default Promotion Target, the name of that Target displays in the Promotion Target field.</p> <p>You can change, or select, the Promotion Target by selecting any Target from the drop-down list.</p>
<p>Step 4</p>	<p>The default login User and Password, or Personal Access Token is provided from the selected Promotion Target record. If you want to override the defaults, click Override Credentials. From the Authentication Method dropdown menu, select Basic to override using a username and password or select Access Token to override using a personal access token.</p> <p>If the promotion contains new or modified Universal Templates, click Allow Universal Template Changes; otherwise, the promotion will not succeed. See Diagnosing Promotion Failures for details.</p>
<p>Step 6</p>	<p>If you want to schedule the promotion of the bundle at a later time, click Schedule.</p>

Step 7

Click **Submit**.

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

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

Note

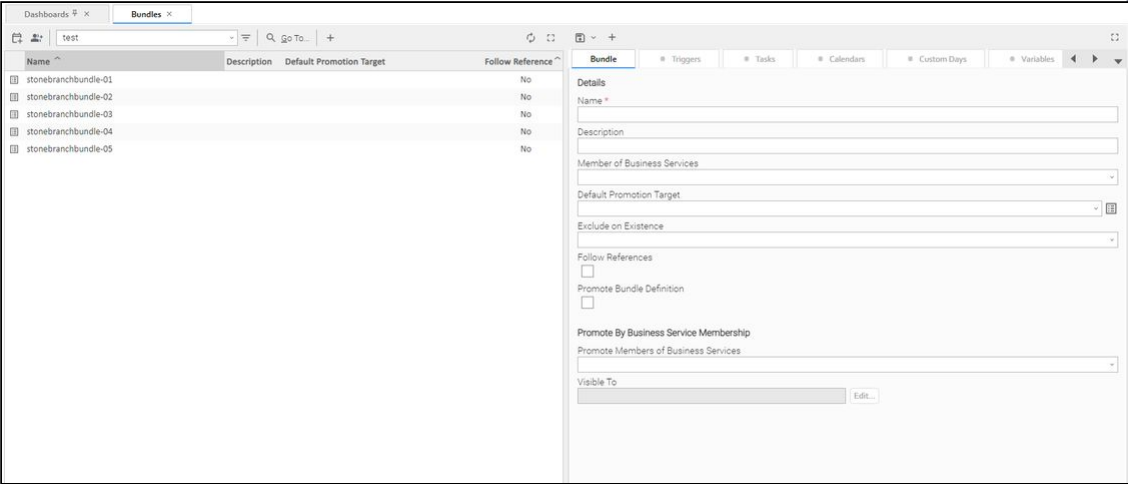
The promotion process creates audit records on the source and target machine. On the target machine, the Controller also creates a Promotion History record. For details, see [Promotion History and the Restore Option](#).

11.3 Scheduling a Bundle Promotion

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

Step 1

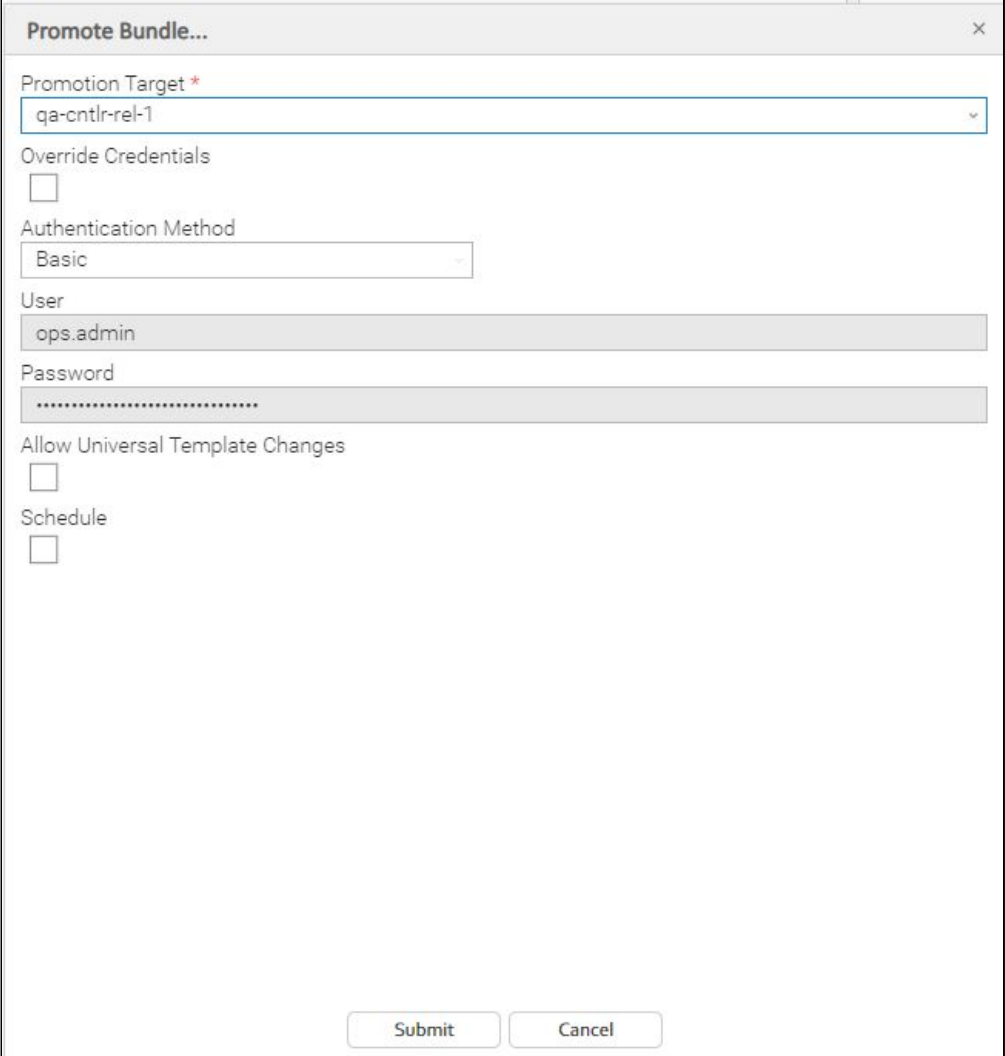
From the [Bundles & Promotion](#) navigation pane, select **Bundles**. The Bundles list displays.



The screenshot shows the 'Bundles' page in the Universal Controller. On the left, there is a table with the following columns: Name, Description, Default Promotion Target, and Follow Reference. The table contains five rows of bundles, all with 'No' in the 'Follow Reference' column.

Name	Description	Default Promotion Target	Follow Reference
stonebranchbundle-01			No
stonebranchbundle-02			No
stonebranchbundle-03			No
stonebranchbundle-04			No
stonebranchbundle-05			No

On the right side of the interface, the 'Details' panel for a selected bundle is visible. It includes fields for Name, Description, Member of Business Services, Default Promotion Target, Exclude on Existence, Follow References, Promote Bundle Definition, Promote By Business Service Membership, and Visible To.

<p>Step 2</p>	<p>Locate the Bundle that you want to promote and either:</p> <ul style="list-style-type: none"> • Right-click the Bundle on the list to display an Action menu and click Promote Bundle... • Open the Bundle record and either click the Promote Bundle... button or access the Action menu and click Promote Bundle... <p>The Promote Bundle pop-up dialog displays.</p> 
<p>Step 3</p>	<p>The default login ID and password, or personal access token is provided from the Promotion Target record, if specified. If you want to override the default, click Override Credentials. From the Authentication Method dropdown menu, select Basic to override using a username and password or select Access Token to override using a personal access token.</p>
<p>Step 4</p>	<p>If the promotion contains new or modified Universal Templates, click Allow Universal Template Changes; otherwise, the promotion will not succeed. See Diagnosing Promotion Failures for details.</p>

<p>Step 5</p>	<p>Click Schedule. Additional fields display on the Promote Bundle pop-up dialog that let you create a promotion schedule.</p> <div data-bbox="416 280 1549 1458" style="border: 1px solid black; padding: 10px;"> <p>Promote Bundle... ✕</p> <p>Promotion Target * <input type="text" value="qa-cntlr-rel-1"/></p> <p>Override Credentials <input type="checkbox"/></p> <p>Authentication Method <input type="text" value="Basic"/></p> <p>User <input type="text" value="ops.admin"/></p> <p>Password <input type="password" value="....."/></p> <p>Allow Universal Template Changes <input type="checkbox"/></p> <p>Schedule <input checked="" type="checkbox"/></p> <p>Date * <input type="text" value="2022"/> <input type="text" value="Aug"/> <input type="text" value="22"/> </p> <p>Time * Hour: <input type="text" value="00"/> Min: <input type="text" value="00"/></p> <p>Create Snapshot <input type="checkbox"/></p> <p>System Notification <input type="text" value="Operation Failure"/></p> <p style="text-align: right;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </p> </div>
<p>Step 6</p>	<p>Select a Date and Time when you want the bundle to be promoted.</p>
<p>Step 7</p>	<p>If you want to schedule the promotion using the current Bundle records, select Create Snapshot. When you submit the schedule, the current Bundle records are collected immediately and promoted at the scheduled time. Any changes to Bundle records between the time that the promotion was scheduled and the time that the promotion was performed are not promoted.</p> <p>If you want to schedule the promotion using the Bundle records collected dynamically at the time of the scheduled promotion, do not select Create Snapshot.</p>

Step 8	<p>If you want to send a System Notification on the success and/or failure of the promotion, select one of the following from the System Notification drop-down list:</p> <ul style="list-style-type: none"> • Operation Failure (default) • Operation Success/Failure • Operation Success <p>If you do not want to send a System Notification, select – None –.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>Promotions without a specified Schedule will run immediately. Real-time notifications will be displayed in the Console, rather than through System Notifications.</p> </div>
Step 9	<p>Click Submit. A record of the promotion schedule is listed in the Promotion Schedules list.</p> <p>After a scheduled promotion has completed, it will remain on the list (where it can be rescheduled to run again) for the number of days specified by the Promotion Schedule Retention Period In Days Universal Controller system property.</p>

11.4 Promoting One or More Individual Records

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

Note

You can only create a [Promotion Schedule](#) for a Bundle of records, not one or more individual records.

Step 1	Display the records list for the type of record that you want to promote.
---------------	---

Step 2

Select the record(s) that you want to promote.

To promote a single record, either:

- Right-click the record to display an [Action menu](#), and then click **Promote**.
- Display the record Details, right-click the Details to display an [Action menu](#), and then click **Promote**.

The Promote dialog displays, prompting you to select the Promotion Target from a drop-down list. Select the target.

Promote...

Promotion Target *
stonebranch-promotiontarget-01

Override Credentials

Authentication Method
Basic

User *
ops.admin

Password *

Exclude on Existence

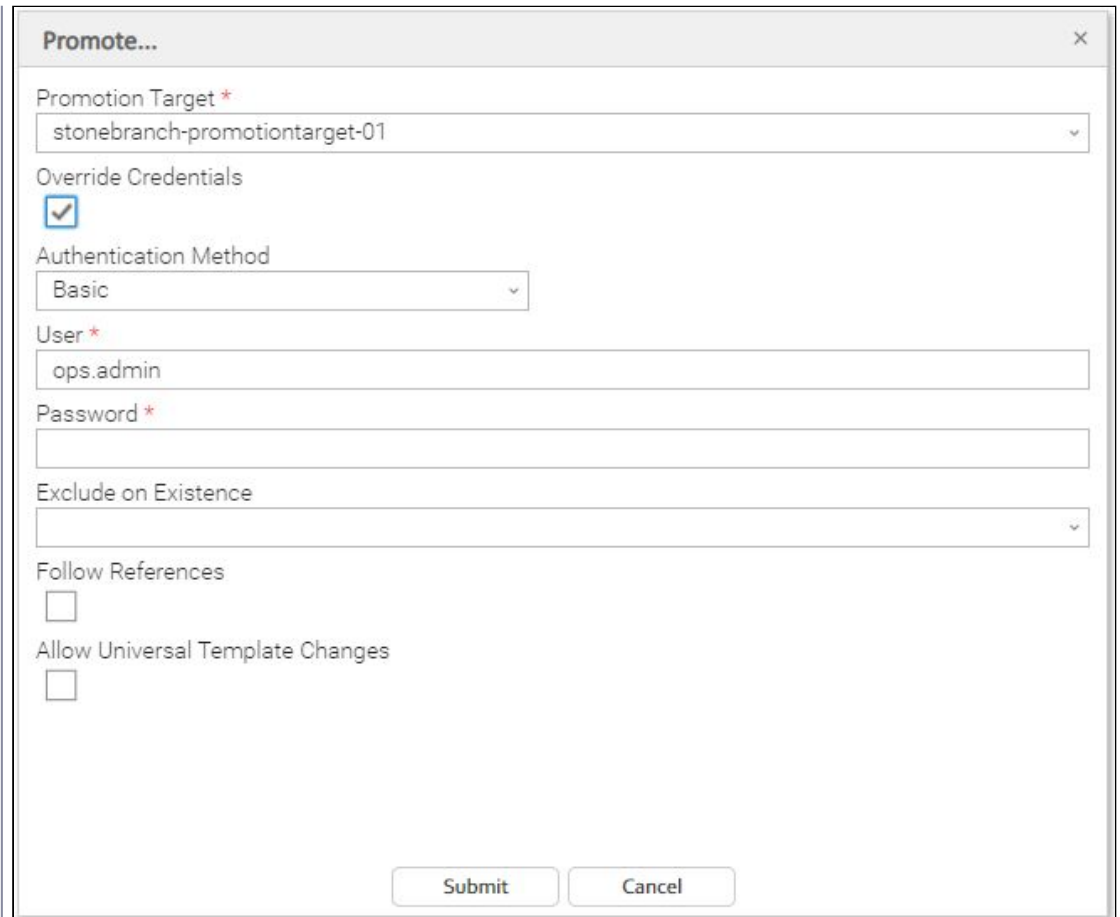
Follow References

Allow Universal Template Changes

Submit Cancel

To promote multiple records, either:

Ctrl-click the records you want to promote, right-click any of the selected records to display an [Action menu](#), and then click **Promote**. The Promote dialog displays, prompting you to select the Promotion Target from a drop-down list. Select the target.



Promote...

Promotion Target *
stonebranch-promotiontarget-01

Override Credentials

Authentication Method
Basic

User *
ops.admin

Password *

Exclude on Existence

Follow References

Allow Universal Template Changes

Submit Cancel

OR

From any tasks list, right-click any column header for the list, display the [Action menu](#), and select [Run Command On Filtered > Promote....](#) The Promote dialog displays, prompting you to select the Promotion Target from a drop-down list. Select the target.

Promote... ✕

Promotion Target *

Override Credentials

Authentication Method

User *

Password *

Exclude on Existence

Follow References

Allow Universal Template Changes

Command **"Promote"** will be run using Filter that currently matches **146** Linux/Unix Tasks.

Step 4	The default login ID and password, or personal access token is provided from the Promotion Target record. If you want to override the default, click Override Credentials . From the Authentication Method dropdown menu, select Basic to override using a username and password or select Access Token to override using a personal access token.
Step 5	<p>Select Exclude on Existence if you want to specify record types in the promotion payload that will not be updated if they exist on the target payload. You can:</p> <ul style="list-style-type: none"> • Select one or more record types from the drop-down list. • Click Check All above the list to select all record types. • Click Uncheck All above the list to de-select all record types. <p>The Bundle Exclude On Existence Picker Default Universal Controller system property specifies which record types, if any, will be selected by default in the drop-down list.</p>
Step 6	Select Follow References if you want to dynamically include records that are referenced by these records. (See Records Promoted When Follow References is Selected or Not Selected .)
Step 7	If the promotion contains new or modified Universal Templates , click Allow Universal Template Changes ; otherwise, the promotion will not succeed. See Diagnosing Promotion Failures for details.
Step 8	Click Submit . The Controller logs in to the target machine specified in the URI field of the Promotion Target Record and copies the selected records to the target machine.

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

11.5 Promoting Universal Tasks and Universal Templates

The following conditions apply for the promotion of [Universal Tasks](#) and [Universal Templates](#):

Subject	Condition
Universal Template	For any Universal Task included in a promotion, its corresponding Universal Template automatically will be included in the promotion.
Universal Template Changes	<p>In order to promote a new Universal Template or a Universal Template change, the promotion must be performed with the Allow Universal Template Changes field enabled on the Promote Bundle... dialog or the Promote... dialog; otherwise, the promotion will fail. See Diagnosing Promotion Failures for details.</p> <p>The Allow Universal Template Changes field is visible on each dialog only if the user has the ops_admin role or the ops_universal_template_admin role, and at least one Universal Template is configured within the source system.</p>
Universal Template Changes	Universal Template changes will be listed under under Non-Restorable Items in the Promotion History Report .
Change Restrictions	All Restrictions on Universal Template Changes apply to any change(s) being applied on a target system with a promotion.
Promotion Failure	Any promotion that includes a Universal Task and/or a Universal Template will fail if the target system is not Universal Controller 6.4.0.0 or later.
Promotion Restore	<p>Any promotion that includes Universal Template changes cannot be restored using the Restore Unchanged or Restore All operations of Promotion History.</p> <ul style="list-style-type: none"> • Promotion History for the promotion will be flagged as not restorable; the Can Restore field in the Promotion History Details for the promotion will not be selected. • Any Universal Template change will be recorded as a Promotion History Item, where the New Version, Previous Version, and Source Version fields are blank.
Follow References	If the Follow References field is enabled for a promotion, the following references are followed for Universal Templates: Agent Cluster (or Broadcast Cluster), Credentials, and Credential Field Type (if a default value has been defined). See Records Promoted When Follow References is Selected or Not Selected .
Follow References	If the Follow References field is enabled for a promotion, the following references are followed for Universal Tasks: Agent Cluster (or Broadcast Cluster), Credentials, and any fields that match a Universal Template Credential Field Type, in addition to the references inherited by all Task Types. See Records Promoted When Follow References is Selected or Not Selected .
Child Audit	For any promoted Universal Template change, a child audit captures the Universal Template Properties, Fields, and Field Choices in the Before, After, and Difference fields.
Child Audit	For any promoted Universal Task, a child audit captures the Before, After, and Difference fields based on the original, incoming, and combination of original and incoming Universal Templates, respectively.

11.6 Diagnosing Promotion Failures

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

Note

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

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

Error Message	Diagnosis
<p>Acceptance of bundle "<bundle-name>" from <node-id> prohibited because a payload from a bundle with the same name is currently being processed by another Universal Controller process.</p>	<p>Accept Bundle command invoked on the target for a bundle with a bundle name for which another Universal Controller process has already acquired a lock.</p>
<p>Bundle "Member of Business Services" option requires a minimum promotion target release level of 6600.</p>	<p>Attempt to promote a Bundle that is a member of a Business Service to a target that is not 6.6.0.0. or higher.</p>
<p>Cannot update Universal Template <Template Name>: Universal Template cannot be updated; System Template cannot be changed.</p>	<p>Attempt to promote a Universal Task that references a Universal Template (not built-in) and the incoming Universal Template matches a Universal Template on the Promotion Target and it is a built-in Universal Template.</p>
<p>Cluster node information could not be determined for the promotion target because the host is unknown (hostname).</p>	<p>Invalid hostname.</p>
<p>Cluster node information could not be determined for the promotion target (Connection refused: connect).</p>	<p>Valid hostname, but no service to accept the connection.</p>
<p>Cluster node information could not be determined for the promotion target because the Web Service is unavailable; the target Universal Controller may still be initializing.</p>	<p>Attempt to promote to a target Universal Controller that is still initializing (starting up).</p>
<p>Cluster node information could not be determined for the promotion target because the user is not authorized; please verify the promotion target user and password.</p>	<p>Invalid user name and/or password.</p>
<p>Cluster node information could not be determined for the promotion target because the user is not authorized for Web Service Access; please verify the promotion target user has Web Service Access enabled.</p>	<p>Valid user name and password, but the user is not authorized for Web Service Access.</p>
<p>Cluster node release level for the promotion target could not be determined and one or more items being promoted require a minimum release level of 6300.</p>	<p>Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.</p>
<p>Cluster node release level for the promotion target is 6xxx, which does not meet the required release level of 6xxx.</p>	<p>Attempt to promote a definition, or a definition using a particular feature, that is not recognized by the promotion target.</p> <p>This message will be followed by one or more messages, each detailing a specific definition or specific feature used by a definition that is not recognized by the promotion target.</p> <p>For example:</p> <p><i>Cluster node release level for the promotion target is 6403, which does not meet the required release level of 6420. Windows Task "Resolve Name Immediately" option requires a minimum promotion target release level of 6420. Web Service Tasks require a minimum promotion target release level of 6410.</i></p> <p>OR</p> <p><i>Cluster node release level for the promotion target is 6601, which does not meet the required release level of 6700. <task-type> Task "Cluster Broadcast Variable" option requires a minimum promotion target release level of 6700.</i></p>

Error Message	Diagnosis
<i>Command Accept Bundle prohibited due to security constraints.</i>	Valid user name and password, but the user is not authorized for the Accept Bundle command, which requires the ops_promotion_admin role.
<i>Command Accept Bundle prohibited due to security constraints. User on target server requires "ops_bundle_admin" role if "Promote Bundle Definition" option is enabled.</i>	Valid user name and password, but the user is not authorized for the Accept Bundle command with the Promote Bundle Definition option enabled, which requires both the ops_promotion_admin role and the ops_bundle_admin role.*
<i>Command Promote (or Promote Bundle) has been routed to the Active server and continues to run in the background.</i>	<p>Promote (or Promote Bundle) command was issued to a Passive server and routed to the Active server, where the Promote (or Promote Bundle) command will run, however, the Promote (or Promote Bundle) command did not complete within approximately 2 minutes.</p> <p>The Promote (or Promote Bundle) command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.</p>
<i>Command Promote Bundle cannot be executed because Promote Members of Business Services or Visible To is not empty, and Universal Controller property "Promote By Business Service Membership Permitted" is not enabled.</i>	Attempt to promote a bundle with Promote Members of Business Services or Visible To non-empty when Promote By Business Service Membership property is false.
<i>Command Schedule Promotion cannot be executed because Promote Members of Business Services or Visible To is not empty, and Universal Controller property "Promote By Business Service Membership Permitted" is not enabled.</i>	Attempt to schedule a bundle promotion (using Snapshot) with Promote Members of Business Services or Visible To non-empty when Promote By Business Service Membership property is false.
<i>Credential "<credential-name>" cannot be promoted because web service credentials are not permitted; Universal Controller property Web Service Credentials Permitted is not enabled.</i>	Attempt to promote to a target Controller where the Web Service Credentials Permitted Universal Controller system property is set to false.
<i>Email Notification "List Report Format" option "<format option>" requires a minimum promotion target release level of 7300.</i>	Attempt to promote a Task that has an Email Notification with List Report Format = XML/JSON/CSV/TSV to a target that is not 7.3.0.0. or higher.
<i>Email Task "List Report Format" option "<format option>" requires a minimum promotion target release level of 7300.</i>	Attempt to promote a Email Task with List Report Format = XML/JSON/CSV/TSV to a target that is not 7.3.0.0. or higher.
<i>Field "Default Value", when greater than 4000 characters, requires a minimum promotion target release level of 7200.</i>	Attempt to promote a Universal Template with a Default Value field value greater than 4000 to a target that is not a 7.2.0.0 or later release.
<i>File Transfer Task "Transfer Protocol" option "FTPES" requires a minimum promotion target release level of 7200.</i>	Attempt to promote a File Transfer Task with Transfer Protocol = FTPES to a release earlier than 7.2.0.0.
<i>File Transfer Task "Authenticate Peer" option requires a minimum promotion target release level of 7200.</i>	Attempts to promote a File Transfer Task with "Authenticate Peer" option requires a minimum promotion target release level of 7200.
<i>File Transfer Task "Verify Host Name" option requires a minimum promotion target release level of 7200.</i>	Attempt to promote a File Transfer Task with "Verify Host Name" option requires a minimum promotion target release level of 7200.
<i>Promoted {EMAIL CONNECTION: Incoming} with name "Gmail" and id 04e5e1074c1f42908d9b3f62f36fff50 is a different type than the original {EMAIL CONNECTION: Outgoing} with name "Gmail" and id 195fc662df8447dc90dec02ea8be0cb4</i>	Attempt to promote an Incoming email connection type and the email connection on the target system is an Outgoing email connection type.
<i>Promoted {EMAIL CONNECTION: Outgoing} with name "Gmail" and id ab36222512cf4ae4afa7e59a8ccbd684 is a different type than the original {EMAIL CONNECTION: Incoming} with name "Gmail" and id a037048f7c4b4e3f9e8691e3f664e5a7</i>	Attempt to promote an Outgoing email connection type and the email connection on the target system is an Incoming email connection type.

Error Message	Diagnosis
<p>Promoted {TASK: Universal} with name "ABC", id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e318 has a different universal template id than the original "ABC" with id 8ee785079fcc4142873486e921bfe789, and universal template id 04cbe858ba7a4bc8bdb26202f359e319.</p>	<p>Attempt to promote a Universal Task with an associated Universal Template that is not equivalent to the Universal Template associated with the target Universal Task.</p>
<p>Promoted {TASK: Universal} with name "<Task Name>" and id <Task UUID> references a built-in Universal Template with name "<Template Name>" and id <Template UUID> that is not loaded on the target server. Use the "List/Load Built-in Universal Templates" Server Operation to load built-in Universal Templates.</p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template and the built-in Universal Template does not exist on the Promotion Target.</p>
<p>Promoted {TASK: Universal, TaskUniversalBean} with name "ABC" and id 8ee785079fcc4142873486e921bfe789 is a different type and/or class than the original {TASK: Timer, TaskSleepBean} with name "ABC" and id dfbd23df8ab24b2a9a0891ae2f8ca22f.</p>	<p>Attempt to promote any item of a specific type (or Java class) that matches another item of a different type (or Java class).</p>
<p>Promoted {UNIVERSAL TEMPLATE} with name "<Template Name>" and id <Template UUID> has a different id than the original "<Template Name>" with id <Template UUID>.</p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template matches a Universal Template on the Promotion Target by name only (that is; UUID mismatch).</p>
<p>Promoted {UNIVERSAL TEMPLATE} with name "<Template Name>" and id <Template UUID> is a built-in universal template; however, the original "<Template Name>" with id <Template UUID> is not.</p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template matches a Universal Template on the Promotion Target and it is <u>not</u> a built-in Universal Template.</p>
<p>Promoted {UNIVERSAL TEMPLATE} with name "<Template Name>" and id <Template UUID> matches both "<Template 1 Name>" with id <Template 1 UUID> by name and "<Template 2 Name>" with <Template 2 UUID> by id.</p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template matches a Universal Template on the Promotion Target by both name and id. In other words, Promotion Strict Mode is always used for built-in Universal Templates.</p>
<p>Promotion failed with the following error(s): Cluster node release level for the promotion target is 7200, which does not meet the required release level of 7300. Task "Mutually Exclusive With Self" option requires a minimum promotion target release level of 7300.</p>	<p>Attempt to promote a task with Mutually Exclusive With Self enabled to a target server with a release prior to 7.3.0.0.</p>
<p>Promotion failed with the following error(s): Cluster node release level for the promotion target is 7200, which does not meet the required release of 7300. Universal Template Field 'Extension Status' option requires a minimum promotion target release of 7300.</p>	<p>A Universal Template will be prohibited from being promoted to a release earlier than 7.3.0.0 if any field in the template is defined with Extension Status = true.</p>
<p>Promotion failed with the following error(s): Cluster node release level for the promotion target is 7200, which does not meet the required release of 7300.z/OS Task "SYSTEM or SYSAFF Override Parameter" requires a minimum promotion target release level of 7300 when specified.</p>	<p>A Zos Task with non-empty SYSTEM or SYSAFF Override Parameter will be prohibited from being promoted to a release earlier than UC 7.3.0.0.</p>
<p>Promotion of bundle "bundle-name" failed with the following error(s): Bundle "<bundle-name>" cannot be promoted because Promote Members of Business Services or Visible To is not empty, and Universal Controller property "Promote By Business Service Membership Permitted" is not enabled.</p>	<p>Attempt to promote a bundle with Promote Members of Business Services or Visible To non-empty to a target system where Promote By Business Service Membership property is false. (The target system rejects the promotion).</p> <p>Note: This is applicable only if Promote Bundle Definition = true.</p>
<p>Promotion of bundle "<bundle-name>" with id <bundle-uuid> prohibited because the bundle is in use by another Universal Controller process.</p>	<p>Promote Bundle command invoked on the source for a bundle with a bundle id for which another Universal Controller process has already acquired a lock.</p>
<p>Promotion Schedule operation for bundle "<bundle-name>" with id <bundle-uuid> prohibited because the bundle is in use by another Universal Controller process.</p>	<p>Schedule Promotion command requires the bundle id lock, but another Universal Controller process has already acquired that lock.</p>

Error Message	Diagnosis
<p>Promotion target "promotion-target-name" has routed the promotion payload to the Active server and the Accept Bundle command continues to run in the background.</p>	<p>Upon receiving the promotion payload, the promotion target determined it was a Passive server and routed the payload to the Active server, where the Accept Bundle command will run, however, the Accept Bundle command did not complete within approximately 2 minutes.</p> <p>The Accept Bundle command will continue to run in the background and the Audit can be consulted to determine the outcome of the command.</p>
<p>Promotion to an earlier release only supported for target releases starting with 6300.</p>	<p>Attempt to promote to a pre-6.3.0.0 release from a 6.3.0.0 or later release.</p>
<p>Protocol <protocol name> is not allowed since it is being excluded by Universal Controller property "File Transfer Task Exclude Protocols".</p>	<p>Attempt to promote a File Transfer Task that has a protocol currently being excluded by the target server.</p>
<p>Protocol <protocol name> is not allowed since it is being excluded by Universal Controller property "FTP File Monitor Task Exclude Protocols".</p>	<p>Attempt to promote an FTP File Monitor Task that has a protocol currently being excluded by the target server.</p>
<p>Recurring Task "Override Variables" delimited name/value pairs, when exceeds the combined maximum of 4000 characters, requires a minimum promotion target release of 7100.</p>	<p>Attempt to promote a Recurring Task with Override Variables delimited name/value pairs that exceeds the combined maximum of 4000 characters to a Promotion Target release that is not 7.1.0.0 or higher.</p>
<p>Remote File Monitor "Server Type" option "FTPES" requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Remote File Monitor with Server Type = FTPES to a release earlier than 7.2.0.0.</p>
<p>Remote File Monitor "Authenticate Peer" option requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Remote File Monitor with Authenticate Peer = true to a release earlier than 7.2.0.0.</p>
<p>Remote File Monitor "Verify Host Name" option requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Remote File Monitor with Verify Host Name = true to a release earlier than 7.2.0.0.</p>
<p>SAP Connection "Client" option requires a minimum promotion target release level of 6700.</p>	<p>Attempt to promote an SAP Connection to a release prior to 6.7.0.0 when the Connection Type is Load Balancing and a Client is specified.</p>
<p>SAP Task "<job-id-field-name>" requires a minimum promotion target release level of 6450 when unspecified.</p>	<p>Attempt to promote an SAP Task with an unspecified SAP Job ID field to a pre-6.4.5.0 release of the Controller.</p>
<p>Script "<script-name>" cannot be promoted because scripts are not permitted; Universal Controller property "Windows/Linux Scripts Permitted" is not enabled.</p>	<p>Attempt to promote a Script Script Type from a source server to a target server, where the target server is configured with the Windows/Linux Scripts Permitted Universal Controller system property set to false.</p>
<p><task-type> Task "Exit Codes" requires a minimum promotion target release level of 6700 when unresolved.</p>	<p>Attempt to promote a task with an unresolved Exit Codes field to a release prior to 6.7.0.0.</p>
<p><task-type> Task "Retry Exit Codes" requires a minimum promotion target release level of 6700 when unresolved.</p>	<p>Attempt to promote a task with an unresolved Retry Exit Codes field to a release prior to 6.7.0.0.</p>
<p>Unable to promote {APPLICATION: Windows Service} with name "<application-name>" and id 0f84fbb388c04bd09a2c7d5a0ac06c70 because an application cannot be promoted with a name change while generated application control tasks are being excluded.</p>	<p>Attempt to promote an Application with a name change while excluding generated Application Control Tasks.</p>
<p>Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is referenced by one or more Universal Tasks.</p>	<p>Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Task requires it to remain a Resolvable type.</p>
<p>Unable to promote <credential-type> credential "<credential-name>" since original Resolvable credential is specified as a default value for one or more Universal Template Fields.</p>	<p>Attempt to promote a Credential that has been converted from a Resolvable type and at least one reference on the target system by a Universal Template Field default value requires it to remain a Resolvable type.</p>

Error Message	Diagnosis
<p>Unable to promote <credential-type> credential "<credential-name>" since original Web Service credential is referenced by one or more Web Service Tasks.</p>	<p>Attempt to promote a Credential that has been converted from a Web Service type and at least one reference on the target system by a Web Service Task requires it to remain a Web Service type.</p>
<p>Unable to promote {CUSTOM DAY} with name "<custom-day-name>" and id 343f68c60cef48279647a45055349c47 because global custom days are not permitted; Universal Controller property "Custom Day Global Permitted" is not enabled.</p>	<p>Attempt to promote a global Custom Day when the Custom Day Global Permitted system property is set to false.</p>
<p>Unable to promote {SCRIPT: Web Service Payload} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e since original {SCRIPT: Data} with name "Data2.txt" and id 1a9f0bbad53b4ca9a6d6076c5970586e is referenced by one or more Universal Tasks.</p>	<p>Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Task (unless all references are included in the promotion payload).</p>
<p>Unable to promote {SCRIPT: Script} with name "Data1.txt" and id c78a9fe3748549808ac5f6248eb4bcc2 since original {SCRIPT: Data} with name "Data1.txt" and id 4d7d06e87aef4461aeabb21191b4c61 is specified as a default value for one or more Universal Template Fields.</p>	<p>Attempt to promote a non-Data script type and the script on the target system is a Data script type currently referenced by a Universal Template (via Universal Template Field).</p>
<p>Unable to promote {TASK: Application Control} with name "<application-name> #QUERY#" and id e9632e6024324d619b3122832e84c8b0 because a generated application control task cannot be promoted with a name change while applications are being excluded.</p>	<p>Attempt to promote a generated Application Control Tasks with a name change while excluding Application.</p>
<p>Unable to promote {TASK: Universal} with name "<Task Name>" and id <Task UUID> since the built-in Universal Template with name "<Template Name>" and <Template UUID> has changed; Universal Controller property "Reconcile Built-in Universal Template Changes On Promotion" is not enabled.</p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template and the incoming built-in Universal Template differs from the original built-in Universal Template on the Promotion Target.</p>
<p>Universal Monitor "Universal Task Publisher Variables" requires a minimum promotion target release level of 7300 when specified.</p>	<p>Attempt to promote a Universal Monitor Task with non-empty Universal Task Publisher Variables will be prohibited from being promoted to a release earlier than UC 7.3.0.0.</p>
<p>Universal Task "<field label>" option requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Universal Task with a non-blank Large Text Field 3 or Large Text Field 4 to a Universal Controller release prior to 7200.</p>
<p>Universal Task "<field label>", when greater than 4000 characters, requires a minimum promotion target release level of 7200.</p>	<p>Attempt to promote a Universal Task with a Large Text field 1 or Large Text field 2 with value greater than 4000 to a Universal Controller release prior to 7200.</p>
<p>Universal Task "Universal Template" with built-in universal template reference requires a minimum promotion target release level of 6800.</p>	<p>Attempt to promote a Universal Task that references a built-in Universal Template to a Promotion Target release that is not 6.8.0.0 or higher.</p>
<p>Universal Template "<template-name>" cannot be promoted because [it is a new template / the template has changed] and the promotion was performed without the "Allow Universal Template Changes" option enabled. Universal Template changes must be promoted by a user with either the "ops_universal_template_admin" role or the "ops_admin" role and with the Allow Universal Template Changes option enabled.</p>	<p>Attempt to promote a new or changed Universal Template without proper authorization or with proper authorization but without proper option usage.</p>
<p>Universal Template "<template-name>" cannot be promoted because [it is a new template / the template has changed] and the promotion user does not have either the "ops_universal_template_admin" role or the "ops_admin" role required to perform the promotion with the "Allow Universal Template Changes" option enabled.</p>	<p>Attempt to promote a new or changed Universal Template without proper authorization (on Promotion Target) but with proper option usage.</p>
<p>Variable "Value", when greater than 4000 characters, requires a minimum promotion target release level of 7100.</p>	<p>Attempt to promote a variable greater than 4000 character to a Promotion Target release that is not 7.1.0.0 or higher.</p>

11.7 Promotion Audit Records

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

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

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

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

The screenshot shows a window titled "Audit Details: Command" with a "Close" button in the top right. It features two tabs: "Audit" and "Child Audits", with "Child Audits" selected. The "Details" section contains the following fields:

- Audit Type:** Command
- Source:** Web Service
- Created:** 2016-09-06 16:07:17 -0400
- Created By:** ops.admin
- Status:** Success
- Description:** Executing Command: ACCEPT BUNDLE
- Before:** (empty)
- After:** (empty)
- Difference:** (empty)
- Additional Information:** PromotionHistoryBean [{bundle_name=D_Bundle} {promotion_user=ops.admin} {restorable=true} {source_node=qa-stone.branch-opwise} {sys_created_by=ops.admin} {sys_created_on=2016-09-06 16:07:17 -0400} {sys_id=27266b7d0aa6496f83094546b5968699} {sys_updated_by=ops.admin} {sys_updated_on=2016-09-06 16:07:17 -0400}]
Successfully accepted bundle "D_Bundle" from qa-stone.branch-opwise".

Other fields include **Table Name:** ops_promotion_history and **Table Key:** 27266b7d0aa6496f83094546b5968699. A **Parent Audit** field is also present but empty.

Audit Details: Update
Close

Audit
Child Audits

Details

Audit Type : Update	Table Name : ops_task_email
Source : Web Service	Table Key : ec68296d506c48a7bc639800d512808b
Created : 2016-09-09 12:01:42 -0400	
Created By : ops.admin	Parent Audit : Command
Status : Success	
Description : Update: TaskEmailBean D_EmailTask, sys_id: ec68296d506c48a7bc639800d512808b	
<p>Properties: TaskEmailBean [{avg_run_time=null} {bcc_recipients=null} {body=This email is to notify you that the task suite that was run has completed successfully. If you need any further information login to the system to verify the output of each task.</p>	
<pre> } {cc_recipients=null} {checksum=null} {connection_id=5978670b7ca3433b857d97b480adcf4} {cp_duration=null} {cp_duration_unit=Minutes} {credentials=null} {credentials_var=null} {credentials_var_check=false} {custom_field1=null} {custom_field2=null} {ef_duration=00:00:00:00} {ef_enabled=false} {ef_time=00:00} {ef_type=Time} {exec_counter=0} {first_run=null} {hold_resources=false} {last_run=null} {last_run_time=null} {if_duration=00:00:00:00} {if_enabled=false} {if_time=00:00} {if_type=Time} {ls_duration=00:00:00:00} {ls_enabled=false} {ls_time=00:00} {ls_type=Time} Before : {max_run_time=null} {min_run_time=null} {name=D_EmailTask} {opswise_groups=86f8841fd0854b7e925205955e19b51b} {reply_to=null} {report_id=bea8c2bfb436476e98c4780c70435b69} {report_var=null} {res_priority=10} {retry_indefinitely=false} {retry_interval=60} {retry_maximum=0} {retry_suppress_failure=false} {run_count=0} {run_time=0} {start_held=false} {start_held_reason=null} {subject=Email from D_EmailTask} {summary=null} {sys_class_name=ops_task_email} {sys_created_by=ops.admin} {sys_created_on=2016-07-25 09:13:36 -0400} {sys_id=ec68296d506c48a7bc639800d512808b} {sys_updated_by=ops.admin} {sys_updated_on=2016-09-09 11:53:42 -0400} {template=null} {to_recipients=MD@stonebranch.com} {tw_delay_amount=null} {tw_delay_duration=00:00:00:00} {tw_delay_type=None} {tw_wait_amount=null} {tw_wait_day_constraint=None} {tw_wait_duration=00:00:00:00} {tw_wait_time=00:00} {tw_wait_type=None} {tw_workflow_only=-- System Default --} {type=Email} {universal_template_id=null} {use_report_var=false} {user_duration=null} {version=5}] </pre>	
<p>Properties: TaskEmailBean [{avg_run_time=null} {bcc_recipients=null} {body=This email is to notify you that the task suite that was run has completed successfully. If you need any further information login to the system to verify the output of each task.</p>	
<p>Please contact support for any additional information.</p>	
<pre> } {cc_recipients=null} {connection_id=5978670b7ca3433b857d97b480adcf4} {cp_duration=null} {cp_duration_unit=Minutes} {credentials=null} {credentials_var=null} {credentials_var_check=false} {custom_field1=null} {custom_field2=null} {ef_duration=00:00:00:00} {ef_enabled=false} After : {ef_time=00:00} {ef_type=Time} {exec_counter=0} {first_run=null} {hold_resources=false} {last_run=null} {last_run_time=null} {if_duration=00:00:00:00} {if_enabled=false} {if_time=00:00} {if_type=Time} {ls_duration=00:00:00:00} {ls_enabled=false} {ls_time=00:00} {ls_type=Time} {max_run_time=null} {min_run_time=null} {name=D_EmailTask} {opswise_groups=86f8841fd0854b7e925205955e19b51b} {reply_to=null} {report_id=bea8c2bfb436476e98c4780c70435b69} {report_var=null} {res_priority=10} {retry_indefinitely=false} {retry_interval=60} {retry_maximum=0} {retry_suppress_failure=false} {run_count=0} {run_time=0} {start_held=false} {start_held_reason=null} {subject=Email from D_EmailTask} {summary=null} {sys_class_name=ops_task_email} {sys_created_by=mdavis} {sys_created_on=2015-05-12 14:20:51 -0400} {sys_id=ec68296d506c48a7bc639800d512808b} {sys_updated_by=mdavis} {sys_updated_on=2016-09-09 12:01:31 -0400} {template=null} {to_recipients=MD@stonebranch.com} {tw_delay_amount=null} {tw_delay_duration=00:00:00:00} {tw_delay_type=None} {tw_wait_amount=null} {tw_wait_day_constraint=None} {tw_wait_duration=00:00:00:00} {tw_wait_time=00:00} {tw_wait_type=None} {tw_workflow_only=-- System Default --} {type=Email} {universal_template_id=null} {use_report_var=false} {user_duration=null} {version=6}] </pre>	
<p>Properties: [Changed body: This email is to notify you that the task suite that was run has completed successfully. If you need any further information login to the system to verify the output of each task.</p>	
<p>Difference : -> This email is to notify you that the task suite that was run has completed successfully. If you need any further information login to the system to verify the output of each task.</p>	
<p>Please contact support for any additional information.</p>	
<p>] [Changed version: 5 -> 6]</p>	
<p>Additional Information :</p>	

For detailed information on audit record, see [Audits](#).

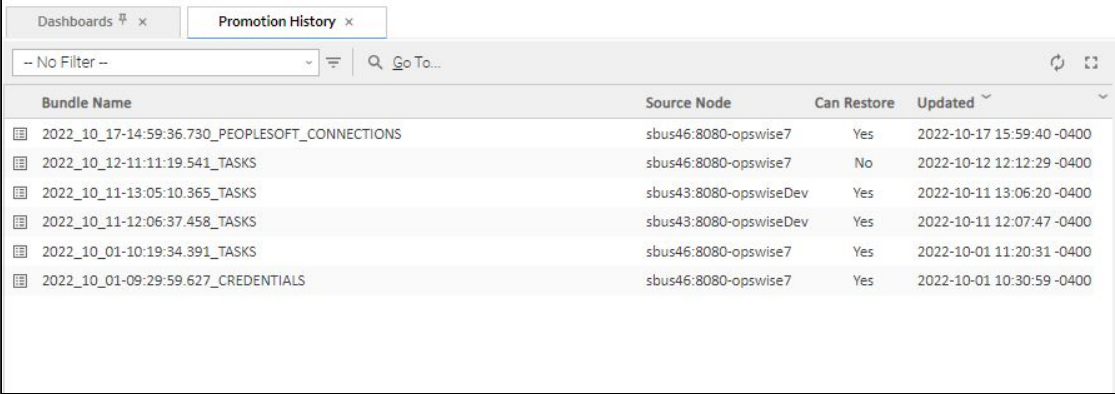
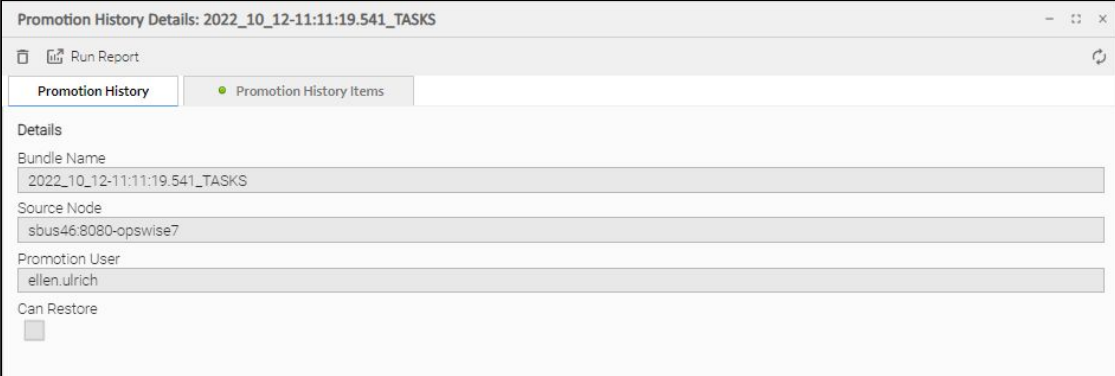
12 Promotion History and the Restore Option

12.1 Overview

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

12.2 Accessing Promotion History Records

To access a Promotion History record on the target Controller:

<p>Step 1</p>	<p>From the Bundles & Promotion navigation pane, select Promotion History. The Promotion History list displays.</p>  <table border="1"> <thead> <tr> <th>Bundle Name</th> <th>Source Node</th> <th>Can Restore</th> <th>Updated</th> </tr> </thead> <tbody> <tr> <td>2022_10_17-14:59:36.730_PEOPLESOFT_CONNECTIONS</td> <td>sbus46:8080-opswise7</td> <td>Yes</td> <td>2022-10-17 15:59:40 -0400</td> </tr> <tr> <td>2022_10_12-11:11:19.541_TASKS</td> <td>sbus46:8080-opswise7</td> <td>No</td> <td>2022-10-12 12:12:29 -0400</td> </tr> <tr> <td>2022_10_11-13:05:10.365_TASKS</td> <td>sbus43:8080-opswiseDev</td> <td>Yes</td> <td>2022-10-11 13:06:20 -0400</td> </tr> <tr> <td>2022_10_11-12:06:37.458_TASKS</td> <td>sbus43:8080-opswiseDev</td> <td>Yes</td> <td>2022-10-11 12:07:47 -0400</td> </tr> <tr> <td>2022_10_01-10:19:34.391_TASKS</td> <td>sbus46:8080-opswise7</td> <td>Yes</td> <td>2022-10-01 11:20:31 -0400</td> </tr> <tr> <td>2022_10_01-09:29:59.627_CREDENTIALS</td> <td>sbus46:8080-opswise7</td> <td>Yes</td> <td>2022-10-01 10:30:59 -0400</td> </tr> </tbody> </table>	Bundle Name	Source Node	Can Restore	Updated	2022_10_17-14:59:36.730_PEOPLESOFT_CONNECTIONS	sbus46:8080-opswise7	Yes	2022-10-17 15:59:40 -0400	2022_10_12-11:11:19.541_TASKS	sbus46:8080-opswise7	No	2022-10-12 12:12:29 -0400	2022_10_11-13:05:10.365_TASKS	sbus43:8080-opswiseDev	Yes	2022-10-11 13:06:20 -0400	2022_10_11-12:06:37.458_TASKS	sbus43:8080-opswiseDev	Yes	2022-10-11 12:07:47 -0400	2022_10_01-10:19:34.391_TASKS	sbus46:8080-opswise7	Yes	2022-10-01 11:20:31 -0400	2022_10_01-09:29:59.627_CREDENTIALS	sbus46:8080-opswise7	Yes	2022-10-01 10:30:59 -0400
Bundle Name	Source Node	Can Restore	Updated																										
2022_10_17-14:59:36.730_PEOPLESOFT_CONNECTIONS	sbus46:8080-opswise7	Yes	2022-10-17 15:59:40 -0400																										
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2022_10_01-09:29:59.627_CREDENTIALS	sbus46:8080-opswise7	Yes	2022-10-01 10:30:59 -0400																										
<p>Step 2</p>	<p>Click anywhere in the row of a Bundle on the list, or click the icon next to the Bundle Name of a Bundle, to display Promotion History Details for that Bundle.</p>  <p>Promotion History Details: 2022_10_12-11:11:19.541_TASKS</p> <p>Run Report</p> <p>Promotion History Promotion History Items</p> <p>Details</p> <p>Bundle Name: 2022_10_12-11:11:19.541_TASKS</p> <p>Source Node: sbus46:8080-opswise7</p> <p>Promotion User: ellen.ulrich</p> <p>Can Restore: <input type="checkbox"/></p>																												
<p>Step 3</p>	<p>To see a list of all records included in the promoted Bundle, click the Promotion History Items tab.</p>																												
<p>Step 4</p>	<p>You can restore records to the state they were in before the promotion. This applies only to records being updated by the promotion, not those being created by a promotion. See the field descriptions below for details.</p>																												

12.3 Promotion History Details Field Descriptions

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

Field Name	Description
Details	This section contains detailed information about the promoted Bundle (or record).
Bundle Name	Name of this record.
Source Node	Machine name or URI of the machine where the source Universal Controller system is running.
Promotion User	User ID of the user who promoted the bundle or record(s).
Can Restore	<p>Specification for whether or not records in the bundle that already existed on the target server can be restored to their state prior to the promotion.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>Any promoted Bundle that includes Universal Template changes cannot be restored. The Promotion History for the promotion will be flagged as not restorable. The Universal Template changes will be listed as Promotion History Items with blank New Version, Previous Version, and Source Version fields.</p> </div>
Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Promotion History Details that let you perform various actions.
Run Report	Generates a one page summary of the contents of the bundle.
Restore Unchanged	For records that already existed on the target server, you can restore them to their state prior to the promotion. The Restore Unchanged button restores only those records that have not been changed since the promotion updated the record. For records that were created on the target machine by the promotion, no changes will occur since no previous version exists. (See Can Restore .)
Restore All	For records that already existed on the target server, you can restore them to their state prior to the promotion. The Restore All button restores all records that were updated by the promotion, including records that were modified since the promotion. For records that were created on the target machine by the promotion, no changes will occur since no previous version exists. (See Can Restore .)
Delete	Deletes the current record.

Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of this record.
Tabs	This section identifies the tabs across the top of the Promotion History Details that provide access to additional information about the promotion.
Promotion History Items	Lists all the records promoted as part of this Bundle. Each record in the list provides the name and type of the record, the latest version number on the target, the previous version number on the target, and the source version number.

13 Promotion Schedules

13.1 Overview

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

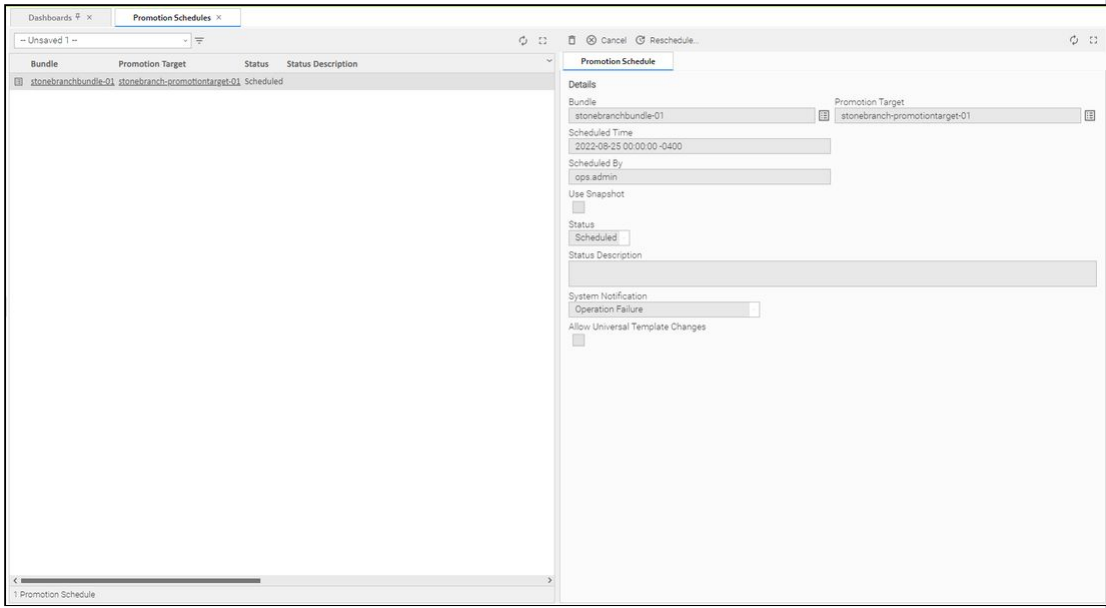
The Promotion Schedules list identifies all scheduled promotions.

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

13.2 Viewing Promotion Schedule Details

Step 1

From the [Bundles & Promotion](#) navigation pane, select **Promotion Schedules**. The Promotion Schedules list displays a list of all Bundles that have been scheduled for promotion.



The screenshot shows the 'Promotion Schedules' interface. At the top, there's a breadcrumb 'Dashboards > Promotion Schedules'. Below it is a search bar containing 'Unsaved 1'. A table lists the promotion schedules with columns: Bundle, Promotion Target, Status, and Status Description. One entry is visible: 'stonebranchbundle-01' for 'stonebranch-promotiontarget-01' with a status of 'Scheduled'. To the right of the table is a 'Promotion Schedule' details pane. It contains fields for Bundle (stonebranchbundle-01), Promotion Target (stonebranchpromotiontarget-01), Scheduled Time (2022-08-25 00:00:00 -0400), and Scheduled By (ops.admin). There are also checkboxes for 'Use Snapshot', 'System Notification', 'Operation Failure', and 'Allow Universal Template Changes'.

Step 2

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

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

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

13.3 Promotion Schedule Details Field Descriptions

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

Field Name	Description
Details	This section contains detailed information about the scheduled promotion.
Bundle	Name of the Bundle scheduled for promotion. You can click the icon next to the Bundle name to view (and edit) the Details for that Bundle.
Scheduled Time	Date and time the bundle is scheduled for promotion.
Scheduled By	User Id of the user that scheduled the promotion of the bundle. <div style="border: 1px solid yellow; padding: 5px;"> <p>Note</p> <p>In case of Promotion Failure, the Scheduled By user will be included in the Promotion Failure system notification as an additional recipient in the CC field (if the User Details for that user specifies an email).</p> </div>

Promotion Target	<p>Cluster Node of a Universal Controller to which the Bundle is scheduled for promotion.</p> <p>You can click the icon next to the Promotion Target name to view (and edit) the Details for that Promotion Target.</p>
Promotion User	User Id of the promotion user that the scheduled promotion will use to promote the bundle.
Promotion Password	Password of the promotion user that the scheduled promotion will use to promote the bundle.
Promotion Personal Access Token	Personal Access Token of the promotion user that the scheduled promotion will use to promote the bundle.
Use Snapshot	Indication of whether or not the promotion is scheduled to be performed using a snapshot of the Bundle records taken at the time the promotion was scheduled.
Status	<p>System-defined; Current status of this Promotion Schedule.</p> <p>Values:</p> <ul style="list-style-type: none"> • Scheduled • Cancelled • Running • Failure • Promoted
Status Description	System-defined; Description of the current Status .
System Notification	<p>Options for when a System Notification will be sent.</p> <p>Options:</p> <ul style="list-style-type: none"> • -- None -- • Operation Failure • Operation Success/Failure • Operation Success
Metadata	This section contains Metadata information about this record.
UUID	Universally Unique Identifier of this record.
Updated By	Name of the user that last updated this record.
Updated	Date and time that this record was last updated.
Created By	Name of the user that created this record.
Created	Date and time that this record was created.
Buttons	This section identifies the buttons displayed above and below the Promotion Schedule Details that let you perform various actions.
Cancel	Changes a scheduled promotion Status from Scheduled to Cancelled.
Reschedule...	Allows you to edit the Promotion Schedule Details (see Modifying and/or Rescheduling a Promotion Schedule , below).
Delete	Cancels and deletes the Promotion Schedule; Delete is prohibited while Status is Running.
Refresh	Refreshes any dynamic data displayed in the Details.
Close	For pop-up view only; closes the pop-up view of these Details.

13.4 Modifying and/or Rescheduling a Promotion Schedule

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

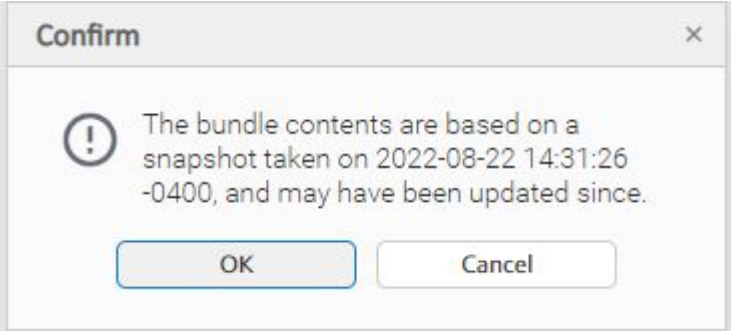
For modifying and/or rescheduling a successfully promoted promotion schedule, see [Modifying and/or Rescheduling a Successfully Promoted Promotion Schedule](#).

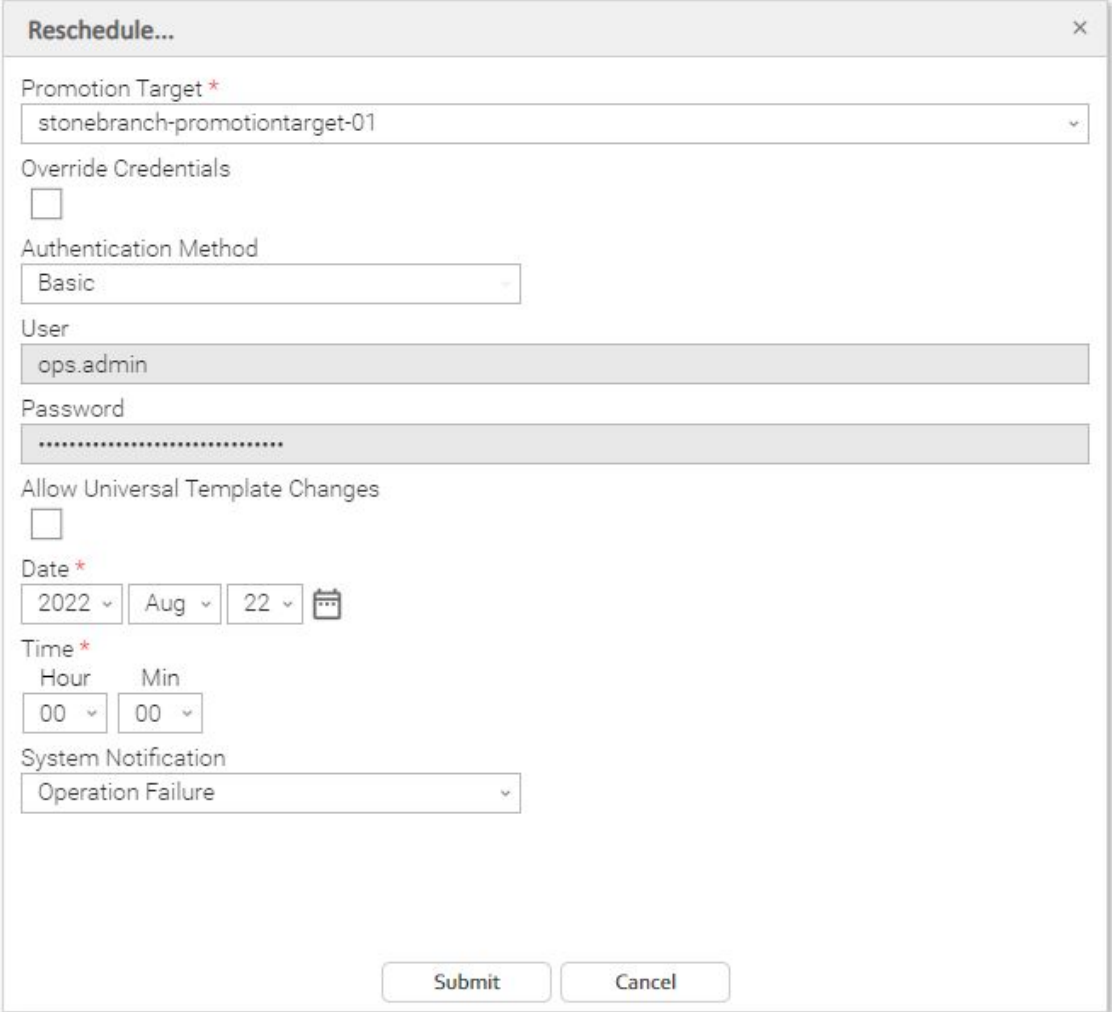
Step 1	From the Bundles & Promotion navigation pane, select Promotion Schedules . The Promotion Schedules list displays a list of all Bundles that have been scheduled for promotion.
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<p>Step 2</p>	<p>Display an action menu for a Promotion Schedule and click Reschedule..., or open a Promotion Schedule record and either:</p> <ul style="list-style-type: none"> • Click the Reschedule... button in the Promotion Schedule Details. • Display an action menu for the Promotion Schedule and click Reschedule... <p>The Reschedule... pop-up dialog displays.</p> <div data-bbox="424 405 1549 1429" data-label="Form"> </div> <p>By default, the following Details for the cancelled Promotion Schedule are changed on the Reschedule... pop-up dialog when it displays:</p> <ul style="list-style-type: none"> • Date is reset to the current date. • Time is reset to 00:00. <p>The Reschedule... pop-up dialog will prompt for the User/Password or Personal Access Token fields if the promotion was originally scheduled with the Override Credentials option, or if the Promotion Target does not have a default User and/or Password defined if Authentication Method is Basic; or does not have a Personal Access Token defined if Authentication Method is Access Token.</p>
<p>Step 3</p>	<p>Enter / reenter new specifications for the Promotion Schedule.</p>
<p>Step 4</p>	<p>Click the Submit button to apply your re-scheduling changes to the Promotion Schedule.</p> <p>The status of the Promotion Schedule automatically changes to Scheduled (or remains in the Scheduled status) when you submit rescheduling changes.</p>

13.5 Modifying and/or Rescheduling a Successfully Promoted Promotion Schedule

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

<p>Step 1</p>	<p>From the Bundles & Promotion navigation pane, select Promotion Schedules. The Promotion Schedules list displays a list of all Bundles that have been scheduled for promotion.</p> <p>You can identify successfully promoted snapshot Bundles by the following columns on the list:</p> <ul style="list-style-type: none"> • Status = Promoted • Use Snapshot = Yes
<p>Step 2</p>	<p>Display an action menu for a Promotion Schedule on the list and click Reschedule..., or open the Promotion Schedule and either:</p> <ul style="list-style-type: none"> • Click the Reschedule... button in the Promotion Schedule Details. • Display an action menu for the Promotion Schedule and click Reschedule... <p>A confirmation pop-up displays. For example:</p> 

<p>Step 3</p>	<p>Click OK to confirm that you want to re-promote the selected snapshot Bundle. The Reschedule... pop-up dialog displays:</p>  <p>By default, the following Details for the Promotion Schedule are changed on the Reschedule... pop-up dialog when it displays:</p> <ul style="list-style-type: none"> • Date is reset to the current date. • Time is reset to 00:00. <p>The Reschedule... pop-up dialog will prompt for the User/Password or Personal Access Token fields if the promotion was originally scheduled with the Override Credentials option, or if the Promotion Target does not have a default User and/or Password defined if Authentication Method is Basic; or does not have a Personal Access Token defined if Authentication Method is Access Token.</p>
<p>Step 4</p>	<p>Enter / reenter new specifications for the Promotion Schedule.</p>
<p>Step 5</p>	<p>Click the Submit button to apply your re-scheduling changes to the Promotion Schedule.</p> <p>The status of the Promotion Schedule automatically changes from Promoted to Scheduled when you submit rescheduling changes.</p>

13.6 Cancelling a Promotion Schedule

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

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

Step 1	From the Bundles & Promotion navigation pane, select Promotion Schedules . The Promotion Schedules list displays a list of all Bundles that have been scheduled for promotion.
Step 2	Display an action menu for a Promotion Schedule on the list and click Cancel , or open the Promotion Schedule and either: <ul style="list-style-type: none">• Click the Cancel button.• Display an action menu for the Promotion Schedule and click Cancel. The Status of the Promotion Schedule in the Promotion Schedule list will change from Scheduled to Cancelled , and a Status Description for that cancelled Promotion Schedule will display.

To reschedule a **Cancelled** Promotion Schedule, see [Modifying and/or Rescheduling a Promotion Schedule](#).

14 Records Promoted When Follow References is Selected or Not Selected

14.1 Introduction

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

The table is in the following format:

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

Note

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

Record Type	With Follow References	Without Follow References
Agent Clusters	none	none
Applications	<ul style="list-style-type: none"> Application Control Tasks (both system-generated and custom Application Control Tasks) Business Services Credentials 	<ul style="list-style-type: none"> Application Control Tasks (system-generated Application Control Tasks)
Business Services	none	none
Calendars Overview	<ul style="list-style-type: none"> Business Services Custom Days 	<ul style="list-style-type: none"> Custom Days
Credentials	<ul style="list-style-type: none"> Business Services 	none
Custom Days	none	none
Dashboards	<ul style="list-style-type: none"> Widgets 	none
Database Connections	<ul style="list-style-type: none"> Business Services Credentials 	none
Email Connections	<ul style="list-style-type: none"> Business Services 	none
Email Templates	<ul style="list-style-type: none"> Business Services Email Connections 	none

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

Record Type	With Follow References	Without Follow References
Virtual Resources	<ul style="list-style-type: none"> • Business Services 	none
Widgets	<ul style="list-style-type: none"> • Composite Status(es) (Activity Widgets only) • Reports (Report Widgets only) 	<ul style="list-style-type: none"> • Composite Status(es) (Activity Widgets only)