

Stonebranch SaaS

Universal Controller 7.9.x

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1 Overview

Stonebranch SaaS is the Universal Controller hosted by Stonebranch in the AWS Cloud.

Note

Stonebranch SaaS is officially SOC2 Type 2 certified as of July 15, 2021.

Stonebranch SaaS contains the exact same set of functionalities, features, and Web GUI as an on-premise installation.

This hosted solution is fully managed by Stonebranch, including installation and regular upgrades to newer releases. This relieves SaaS customers of server and platform management and allows them to focus on scheduling automated IT jobs, workloads, and business processes via the Web GUI.

Differences between an on-premise installation and a Stonebranch SaaS deployment are explained in the following table.

2 Stonebranch SaaS Specifications

Specification	Information on Stonebranch SaaS
Responsibility Layer	<p>With Stonebranch SaaS:</p> <ul style="list-style-type: none"> Stonebranch fully manages all back-end resources. SaaS customers have no access to the back-end servers, databases, or other resources. All customer access occurs via the Controller GUI or API. Customers are responsible for their agents, workload, bundle and promotion between environments, and user/group management. This includes ensuring that secure passwords are used. <p>By contrast, customers that perform an on-premise Controller installation are responsible for every aspect of their environment.</p>
Controller Time Zone	<p>The default (best practice) time zone for Stonebranch SaaS is UTC (Coordinated Universal Time). However, customers can decide which time zone that they want Stonebranch SaaS to use.</p> <div style="border: 1px solid orange; padding: 10px; margin-top: 10px;"> <p>Note</p> <p>Triggers can be individually configured to use custom time zones independent of the back-end resources.</p> </div>
Authentication	<p>For Stonebranch SaaS, customers must decide what login method they will use:</p> <ul style="list-style-type: none"> Local users LDAP Single Sign-On <p>A customer requesting Single Sign-On must work with Stonebranch for implementation.:</p> <ul style="list-style-type: none"> Inform Stonebranch which identity provider they will use. Provide Stonebranch with an IdP file.
Networking	<p>Stonebranch SaaS customers can only run workload on agents they connect to the Controller or via API.</p> <p>Based on the customers networking requirements/restrictions, firewall modifications may need to be implemented to allow communication between the agents and the Stonebranch back end.</p> <p>One example of this is modifying an on-site firewall to allow outbound connections to an IP:PORT provided by Stonebranch.</p> <p>There currently are two connectivity options:</p> <ul style="list-style-type: none"> Agents connecting to the Stonebranch SaaS Controller via TLS over the internet. Site-to-site VPN between Stonebranch and customer data center. <p>If site-to-site VPN is requested, customers must work with Stonebranch for implementation by providing the following information:</p> <ul style="list-style-type: none"> Gateway vendor to be used (for example: Cisco, Palo Alto, SonicWALL, Check Point). IP(s) used for their public-facing gateway. Private subnet to be used (for example, 172.16.0.0/16).

3 Shared Responsibility Layer

Owner	Responsibility	Components
Customer	Security "in" the Cloud	<ul style="list-style-type: none">• Users• Credentials• Authentication• Workload<ul style="list-style-type: none">• Tasks• Workflows• API calls• Integrations• Agents Overview
Stonebranch	Security "of" the Cloud	<ul style="list-style-type: none">• Application• Infrastructure<ul style="list-style-type: none">• Servers• Databases• Networking

4 Universal Controller User Documentation

The following tables identify, and link to, the sections of the Universal Controller user documentation that are relevant to Stonebranch SaaS.

4.1 General Information

General Information	Information about understanding and using Universal Controller.
Logging In	Methods of logging in to the Controller; restrictions and notifications; additional login information.
User Interface	Explanation of the Controller user interface.
Problem Resolution - Operations	Resolution for possible problems associated with Controller operations.
Error Messages	Error messages related to problem resolutions for Controller operations.

4.2 Administration

Administration	Information about various administrative procedures for Universal Controller.
LDAP Settings	Procedures for enabling the LDAP bridge, for both UNIX and Windows operating systems, via the user interface
Single Sign-On Settings	Information about enabling Web Browser Single Sign-On (SSO) through Security Assertion Markup Language 2.0 (SAML 2.0).
Password Settings	Information on configuring settings for all user passwords.
Universal Templates	Information on creating and using Universal Templates on which Universal Tasks are based.

4.3 Remote Interfaces

Remote Interfaces	Information about implementing Universal Controller work outside the user interface.
RESTful Web Services API	RESTful-based web services API that allows you to perform multiple operations.

4.4 Resources

Resources	Records that both define your Universal Automation Center system and that you set up to help facilitate operations.
Resources Overview	Identifies all Controller Resources.

Agents Overview	Identifies agents, running programs on one or more remote machines.:
Agent Clusters	Groups of agents from which the Controller uses pre-defined parameters to select the most appropriate agent for a task.
Scripts	Information on using scripts stored in the Controller database.
Email Templates	Information on how to construct information that can be copied to create Email tasks.
Email Connections	Provides email server information required for the Controller to send an email.
SAP Connections	Provides SAP server information required for running SAP tasks.
PeopleSoft Connections	Provides PeopleSoft server information required for running PeopleSoft tasks.
SNMP Managers	Information on how to generate SNMP Notifications.

4.5 Security

Security	Information about various aspects of Controller security.
Users and Groups	Procedures for creating users and User groups for the Controller.
Roles and Permissions	Assigning roles for user and group access to administrative functions within the Controller, and assigning permissions that control user and groups access to specific functions for specific types of Controller records.
Credentials	Information on the user ID and password under which an agent runs tasks on the machine where the Agent resides.
Business Services	Information on how to organize data into groups of related information.
Audits	Detailed records of all user interactions with the Controller.

4.6 Tasks and Workflows

Tasks and Workflows	Information about the tasks and workflows that run processes.
Creating Tasks	Information on the different tasks that execute processes on local or remote machines.
Creating Task Actions	Actions that can defined for specific tasks.
Creating Task Virtual Resources	Defining virtual resources for specific tasks.
Copying Tasks	Information on copying tasks.
Setting Mutually Exclusive Tasks	Set a task to be mutually exclusive with one or more other tasks.
Creating Notes	Create a note for any Controller task or script .
Manually Running and Controlling Tasks	Issuing commands against running tasks.
Creating and Maintaining Workflows	Information on how to create and maintain workflows.

Monitoring Task and Workflow Activity	Methods of monitoring tasks and workflows progress.
Integrations	Information on creating Universal Tasks based on Universal Templates

4.7 Variables and Functions

Variables and Functions	Information about various variables and functions.
Variables and Functions Overview	Identifies types of variables and how they are used.
User-Defined Variables	Information on variables defined by the user.
Built-In Variables	Information on variables maintained by the Controller.
Creating a Set Variable Action	Information on setting a variable to a specific value and scope.
Functions	Identifies types of functions and how they are used.

4.8 Triggers and Calendars

Triggers	Information about the different types of triggers and their calendars.
Triggers Overview	Information on creating types of triggers.
Enabling and Disabling Triggers	Instructions on how to enable and disable triggers.
Assigning and Unassigning Trigger Execution Users	Information on assigning execution users to triggers
Copying Triggers	Instructions on how to copy a trigger.
Triggering with Variables	Information on to launch a trigger with variables.
Triggering by Date and Time	Information on to launch a trigger by date and time..
Displaying Trigger Forecast Information	Information on displaying and re-calculating trigger forecasts.
Calendars Overview	Information on setting up and using calendars.
Creating Custom Days	Instruction on how to create custom days for calendars
Creating Calendars	Instruction on how to create calendars.
Copying Calendars	Instruction on how to copy calendars.

4.9 Application Monitoring and Control

Application Monitoring and Control	Information on application resources, tasks, and triggers.
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Overview	Information on application monitoring and processing.
Application Resources	Information on defining application monitoring records.
Application Control Tasks	Information on defining application monitoring tasks.
Application Monitor Triggers	Information on defining application monitoring triggers.

4.10 Reporting

Reports	Information on dashboards, reports, and widgets.
Dashboard Details	Information on the Controller dashboards that displays system information and activity.
Report Details	Information on running various types of built-in and user-defined reports.
Widgets	Information on the widgets that make up the dashboards
Colors	Information on assigning colors to task instance statuses.

4.11 Bundles and Promotion

Bundles and Promotion	Information on creating, scheduling and promoting bundles of Controller records.
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