Xporter Utility

Tidal Solution by Synertech Inc.

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Tidal Enterprise Scheduler Best Practices

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Overview

Synertech Xporter is a web-based enterprise tool designed for seamless job migration. Built as a server-based application, it is functionally similar to Transporter with enhanced features and improved accessibility.

- The browser accessible interface eliminates local installation.
- Users log in with active directory, providing direct integration with the user's existing Tidal access credentials.
- Xporter leverages Tidal's REST API, the supported method for interfacing with Tidal.

User friendly interface

- Users select from pre-configured sources and destinations.
- The available client manager connections are centrally managed by administrators.
- Multiple object types may be selected and transferred in a single export. Correct copy order is handled automatically.
- Flexible object mapping uses shared map files for enhanced consistency.

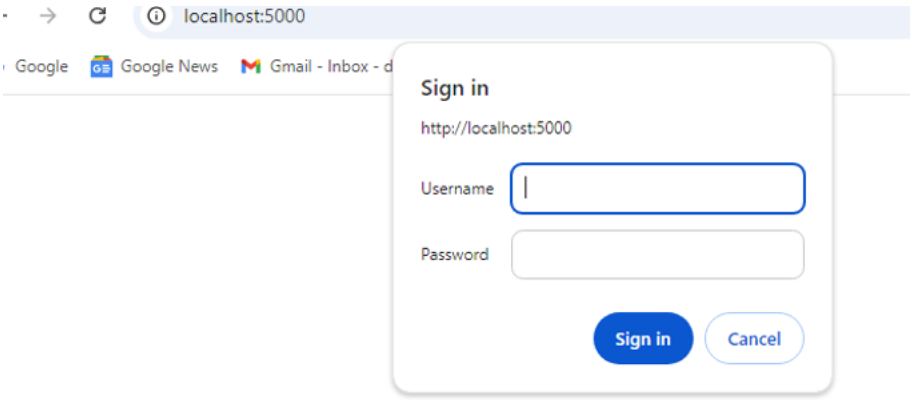
Advanced migration feaures

- Modify job names during export, managed in the mapping interface.
- Easily schedule exports from within the Xporter application.
- Validate an export before running with changes.
- Resolve potential conflicts, such as missing objects, directly from the automatically displayed log.
- Enhanced recovery through rollback capability.

Getting Started

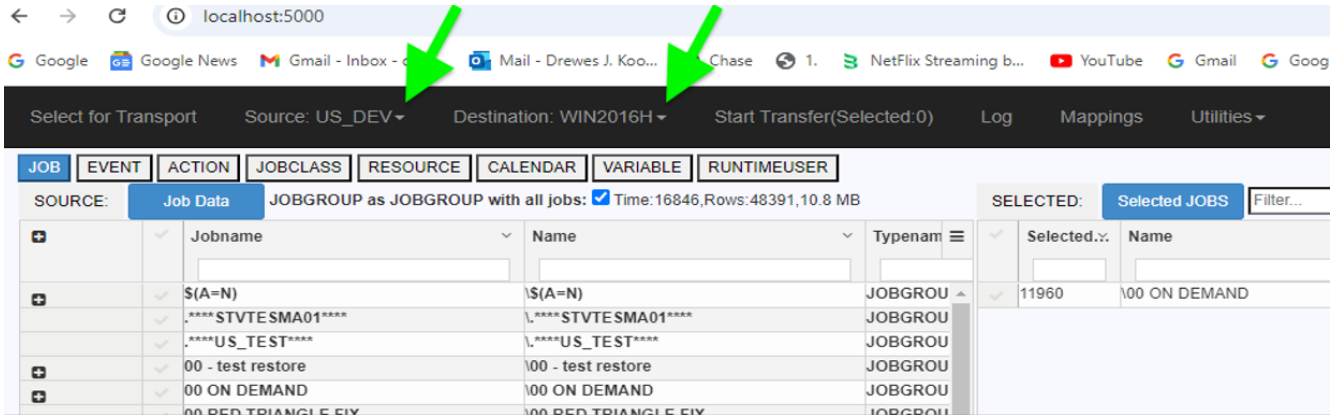
The user connects via web browser.

Login with domain credentials. The account will be used to connect to the Tidal instances. The account must have adequate permissions in Tidal.



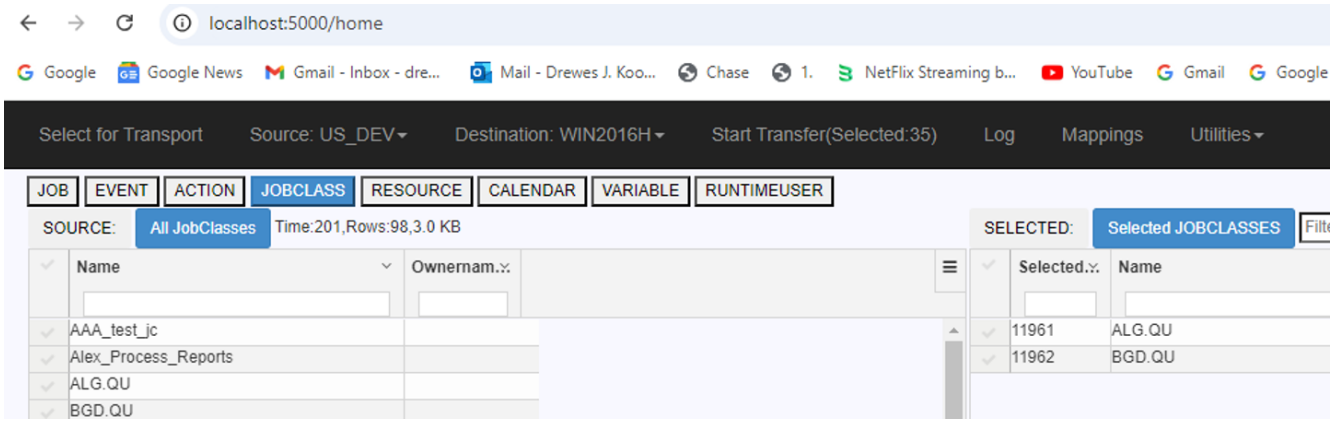
Select Source and Destination

Use the drop down menus in the main menu across the top.



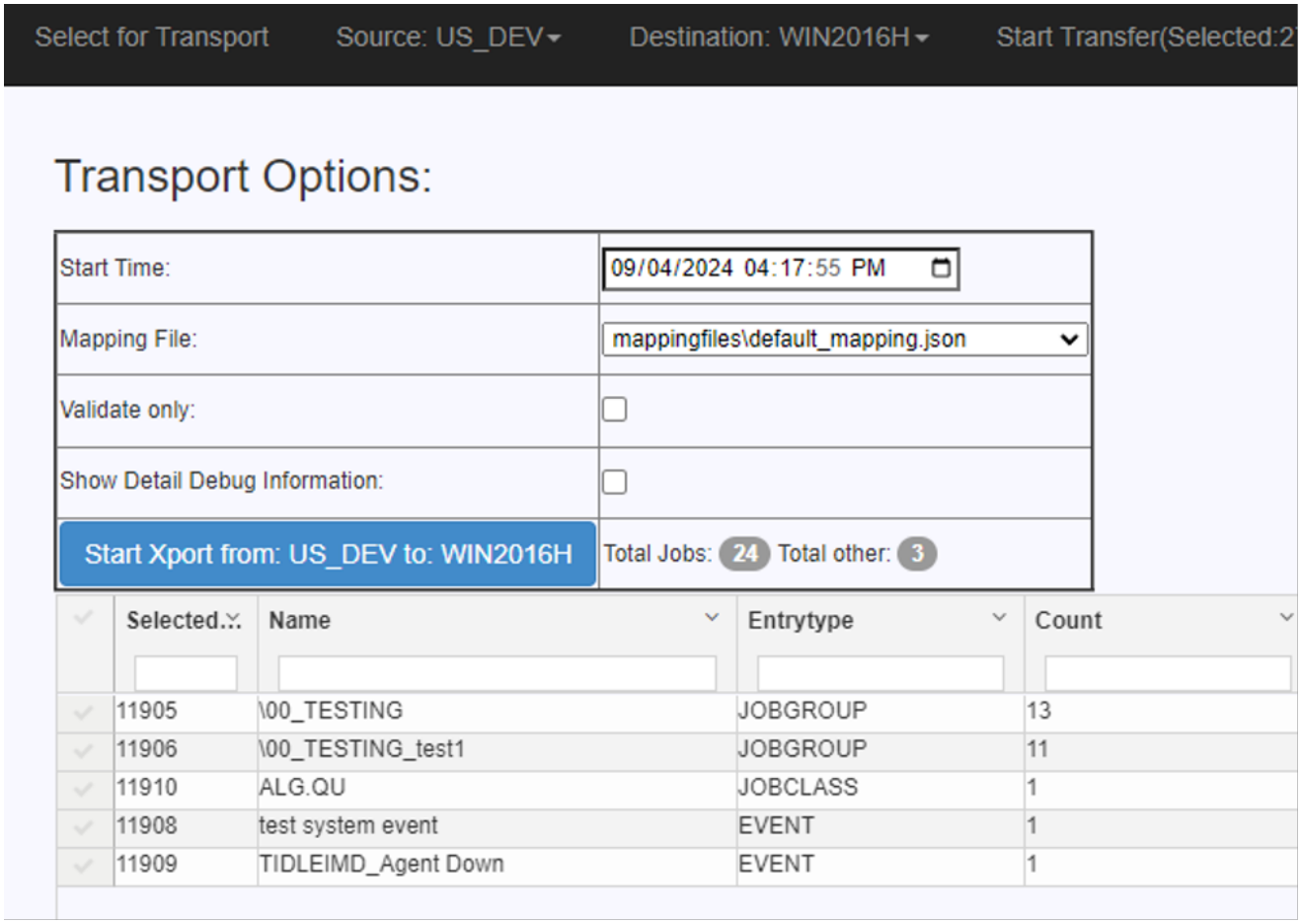
- It is possible to export jobs to a different group within the same Tidal environment. Select the same source and and destination. Map the groups in the mapping file.

Select the Tidal objects to be exported.



- Multiple object types may be transferred in one export. Xporter will update the objects in the correct order.
- Use the horizontal button list to select various object types.
- Select the jobs or other objects in the left SOURCE panel. Selected objects appear in the right SELECTED panel.
- To remove a selected object from the export, click the object in the SELECTED panel.
- Once the desired objects are selected, begin the export using '*Start Transfer*' in the main menu.

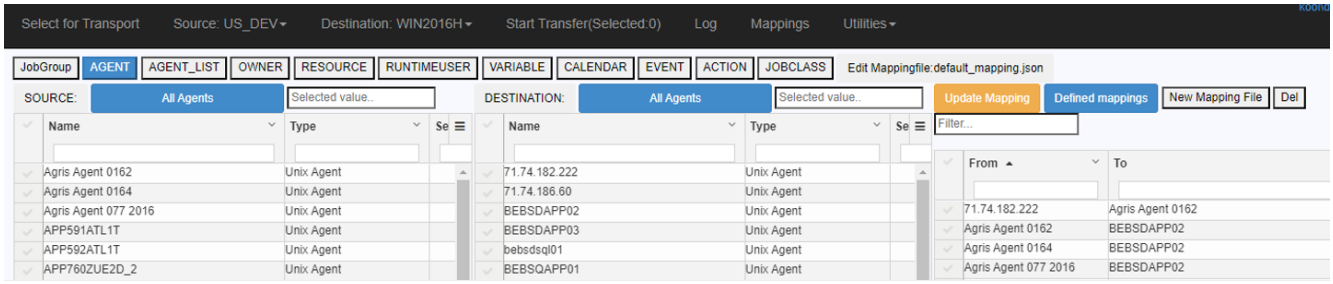
The Options dialog is displayed.



- The export may be scheduled for a future start time.
- Ensure the correct mapping file is selected. Select *Mappings* in the main menu to view, create, or edit a mapping file. The mappings page is covered in more detail in the next section. Return to this page by selecting *Start Transfer* main menu button.
- *Validate only:* will check for errors and report them. No objects will be exported.
- The '*Start Xport*' button shows source and destination environments and number of objects to be exported.
- Select the '*Start Xport*' button to begin export or validation check.

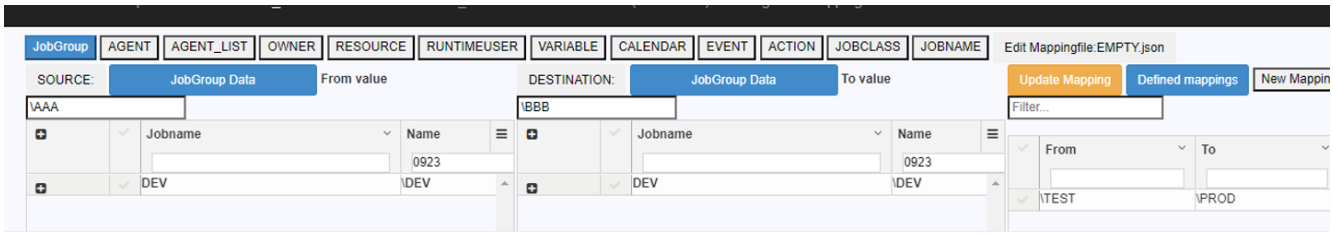
The displayed Mapping file is selected from the Start Transport page.

Source objects are on the left, Destination objects middle, current mapping in the right panel. Mapping issues are shown in red.

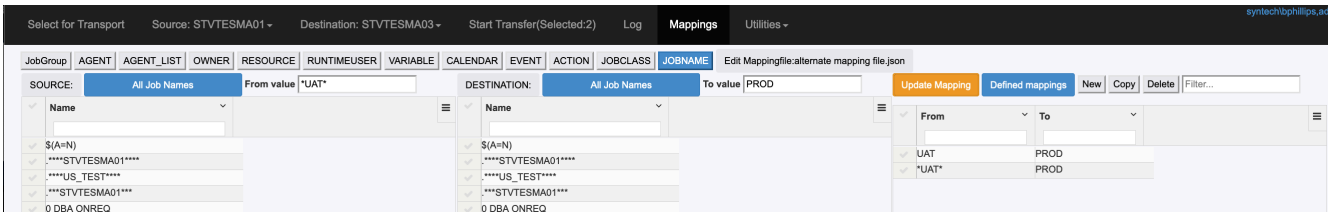


- Changes are automatically saved to the mapping file.
- If temporary or alternative mapping is needed, copy the map, make changes, then select the new map in the *Start Transfer* dialog before beginning the export.

Example mapping jobs to a different parent group

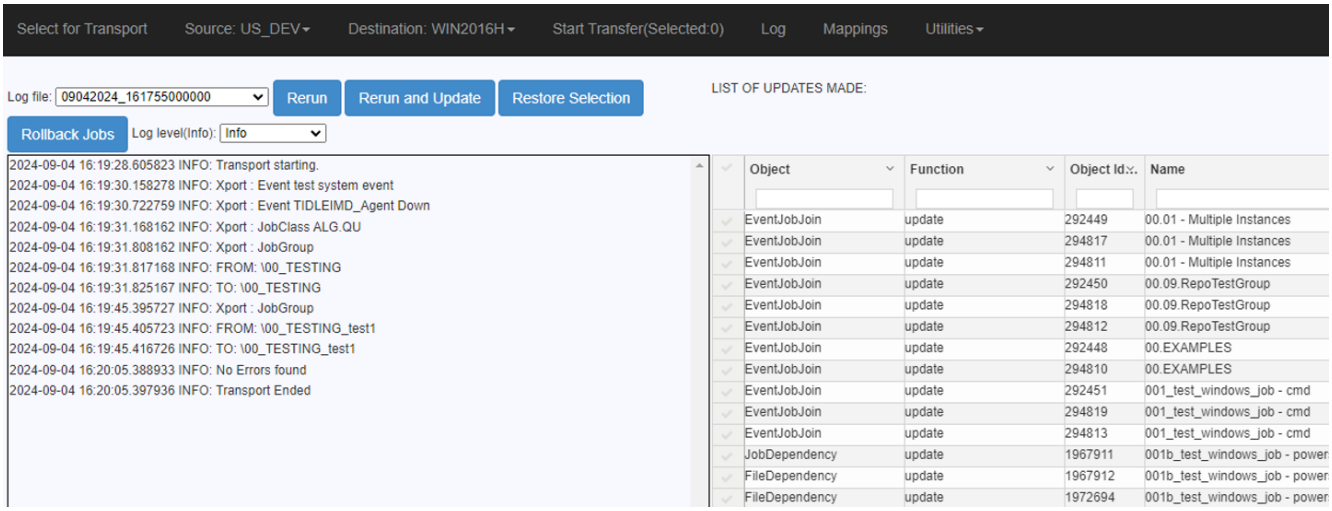


Example: mapping job name changes



- Enter *From* and *To* values. Then select *Update Mapping* to add it to the right mapping panel.
- In the example, the text UAT in the *From* value will be searched as a prefix.
- To replace text within the job name string, use the *asterisk* wildcard, like *UAT*.

The Export Log is displayed



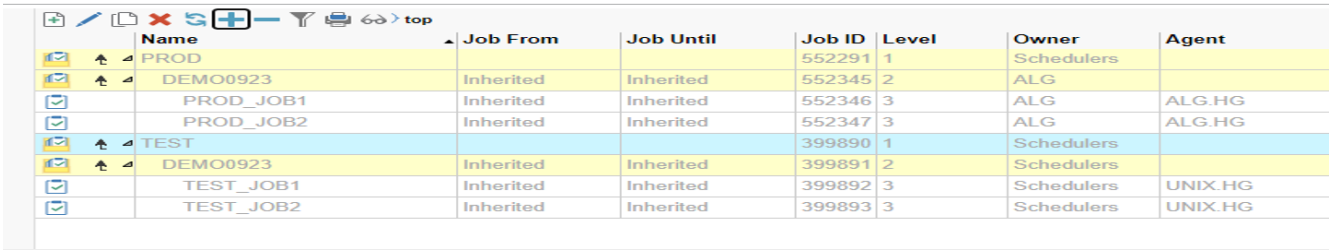
- Objects exported are shown on the left.
- Objects updated or created at the destination are shown right.
- Once the export is complete, the roll back option is available to roll back job changes.

Correcting errors directly from the Log page

- In this example a variable is referenced in a job listed for export. However the variable does not exist at the destination, generating an error. Or is not mapped to an another variable.
- *Delete* will simply remove the job item from the list selected for export.
- *Update Selection* will add the missing variable object to the export list.
- The update happens in the background and is not visible from the log page.
- Rerun to export with the update applied.
- If the *Validate only:* option was originally selected, then *Rerun and Update* will export.

Post export

Tidal Client screen shot of jobs exported from test to production groups within the same Tidal instance. Note job names were updated during export.



Name	Job From	Job Until	Job ID	Level	Owner	Agent
PROD			552291	1	Schedulers	
DEMO0923	Inherited	Inherited	552345	2	ALG	
PROD_JOB1	Inherited	Inherited	552346	3	ALG	ALG.HG
PROD_JOB2	Inherited	Inherited	552347	3	ALG	ALG.HG
TEST			399890	1	Schedulers	
DEMO0923	Inherited	Inherited	399891	2	Schedulers	
TEST_JOB1	Inherited	Inherited	399892	3	Schedulers	UNIX.HG
TEST_JOB2	Inherited	Inherited	399893	3	Schedulers	UNIX.HG

Installation Requirements

Hardware requirements	OS Requirements	Database Requirements	Security
64-bit CPU	Windows 2016 and higher	No database requirements	AD Authentication
Min 8GB memory	Linux (RH, Ubuntu, Centos)		
4 CPU minimum			

During installation, the following are required:

- Embedded database will be used. No DB installation is required.
- Admin rights to install software, create a service, and run the application
- Edit the configuration file for CM connection information.
- Create mapping files, like Transporter mapping files, which can be converted and imported by the application.
- Again, we choose the 'equals' condition to keep the scope of the share as narrow as possible. And add the Shared Owner Policy previously defined.

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