

FORTRA

JAMS
7.7

Getting Started Guide

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Getting Started Guide Overview

The JAMS Getting Started Guide describes the common steps for setting up Jobs after you install JAMS. The Getting Started Guide walks you through the steps for creating the key areas for running scheduled and unscheduled (ad hoc) Jobs. This includes the following steps:

1. Installing JAMS on a single server.
2. Creating a Credential to access and run a Job.
3. Creating a Folder to store a Job.
4. Creating a Job that runs at a scheduled date and time.
5. Creating a Job that runs when you manually submit it (ad hoc).
6. Submitting the Job.
7. Viewing the Jobs in the Monitor view.

Before starting this process, it is important to note that ad hoc Jobs will appear in the Monitor for only 10 minutes after the Job has executed (run) independent of its status. We encourage you to work uninterrupted to avoid repeating the exercise.

NOTE: Jobs can run on either the JAMS Scheduler or a JAMS Agent. For this Getting Started Guide, the Jobs will run on the JAMS Scheduler. See the Agent articles in JAMS Help for more information on working with Agents.

NOTE: There are often several ways to complete a task using the options on the screen, including buttons at the top of the screen in the Control Bar or using a right-click menu. This Getting Started Guide uses the right-click menu for the procedures.

JAMS Terms

When you get started with JAMS, it is important to understand the following terms:

Client: The Client refers to the JAMS Desktop application or the JAMS Web application that you use to work with Jobs, Folders, and other JAMS items. The Client interacts with the JAMS Scheduler and the JAMS Database.

Credential: A Credential is a user account that has specific permissions assigned to it to control its level of access within JAMS.

Folder: A Folder contains a logical group of Jobs or Variables. Folders can be defined by department, such as Accounting or Sales, or any other meaningful way to your organization. At least one Folder must exist for JAMS to function properly.

Job: A Job is a set of instructions or a process that will run within JAMS. This can include a PowerShell script or a set of steps for interacting with an integrated system.

Job Source: The Job Source is a tab within the Job that lets you add, edit, or delete code that sets the function for the Job.

Monitor: The Monitor is an option in the Shortcuts menu that displays a continuously updated list of Jobs that are known to the JAMS Scheduler. This lets you see the status of each Job that is running or will run in the near future.

Scheduler: The Scheduler is the JAMS component that manages and submits Jobs that run on your organization's servers. The Scheduler is responsible for keeping track of all Jobs and communicating their status to the JAMS Client.

Installing JAMS on a Single Machine

You can install JAMS on a single machine or virtual machine for testing or setup purposes. Additional configurations, such as high availability, can be setup, but they are not covered in this Getting Started Guide. For this process, the JAMS Scheduler and JAMS Client are installed on the same machine.

NOTE: If you have already installed JAMS by following the instructions in the JAMS Installation Guide, you can skip this section.

Before You Begin

- Ensure your machine has an internet connection.
- Verify the machine meets the System Requirements described in the JAMS Installation Guide.
- Download the latest installer from the [JAMS Support Site](#), and you save it to the Windows Server machine.
- Log in with a user account with administrator privileges and the ability to create the JAMS Database in SQL Server. Typically, using an account with dbcreator and securityadmin or sysadmin rights in SQL Server provides the necessary permissions.)
- Ensure you have received a license file.

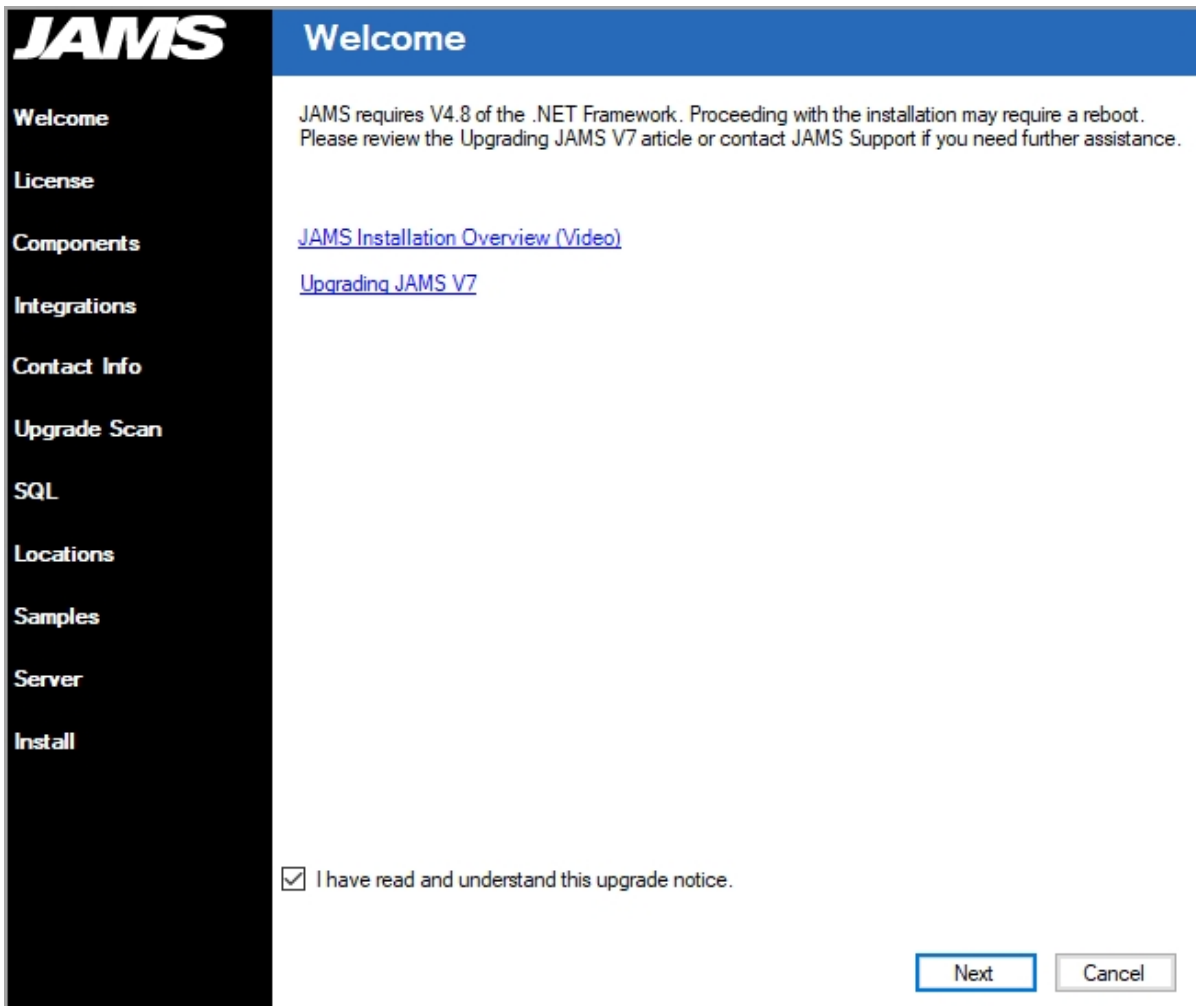
Installing JAMS on a Windows Server

Follow the steps below to install JAMS on a Windows Server machine.

1. Log in to Windows using an account with administrator privileges and the ability to create the JAMS Database in SQL Server.

NOTE: Users must also be able to create a database on the database server. The default database server is the local machine.

2. Right-click the **SetupJAMS** executable and select **Run as Administrator** to start the JAMS installer.
3. On the Welcome page, click **Next**.



4. On the License Agreement page, review the JAMS license agreement.
5. Select the checkbox next to **I accept this license agreement**.

6. Click Next.

JAMS

License Agreement

Welcome ✓

License

Components

Integrations

Contact Info

Upgrade Scan

SQL

Locations

Samples

Server

Install

Please read and accept the JAMS license agreement.

Help/Systems, LLC Software License and Services Agreement

This Software License and Services Agreement (the "Agreement") is between Help/Systems, LLC, a Delaware limited liability company with offices located at 6455 City West Parkway, Eden Prairie, MN 55344 USA ("HelpSystems") and the individual or type of Person intending to download, install or otherwise use the Software (the "Customer" and together with HelpSystems, the "Parties").

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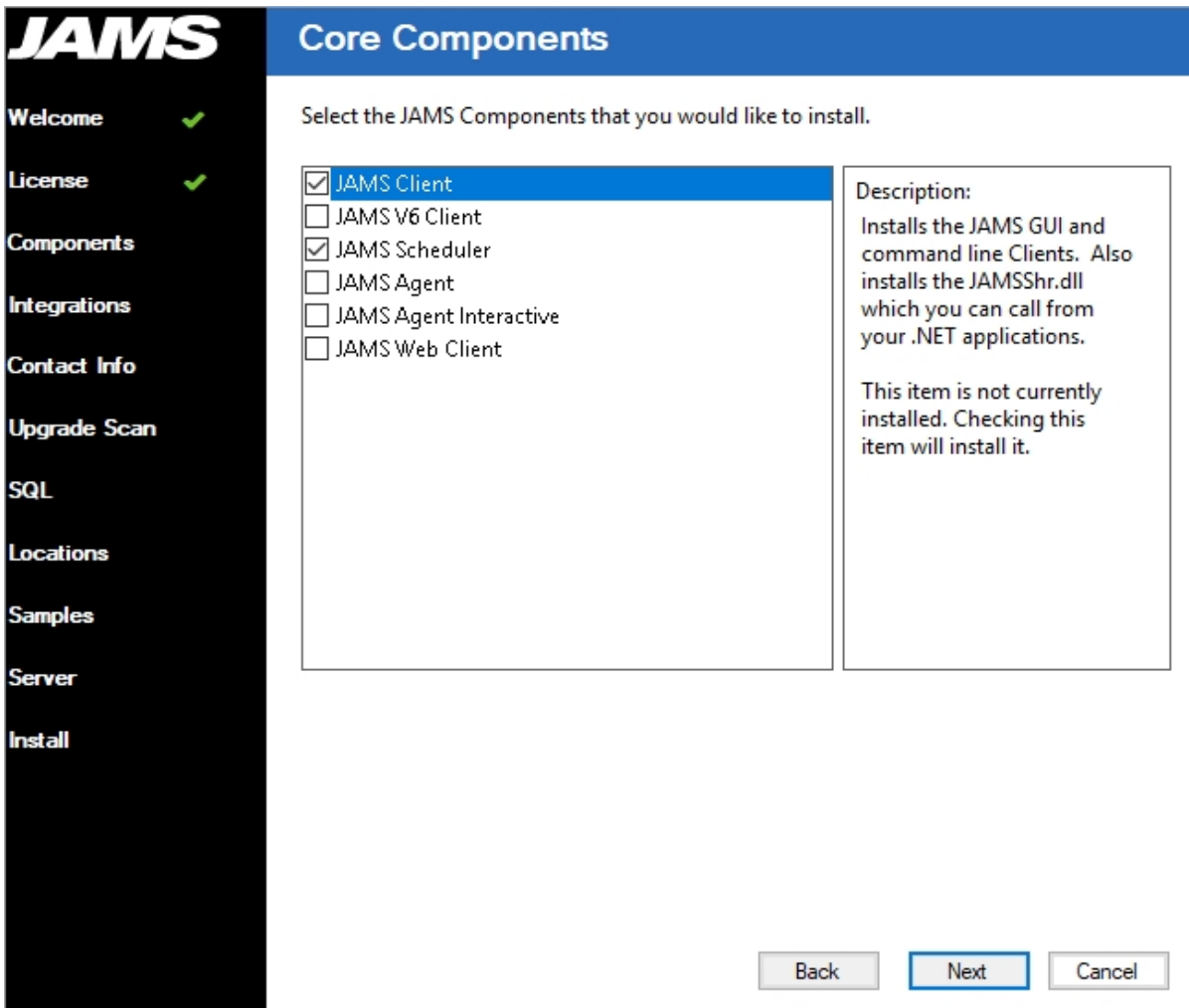
SECTION 1. Definitions.

☒ I accept this license agreement

Back Next Cancel

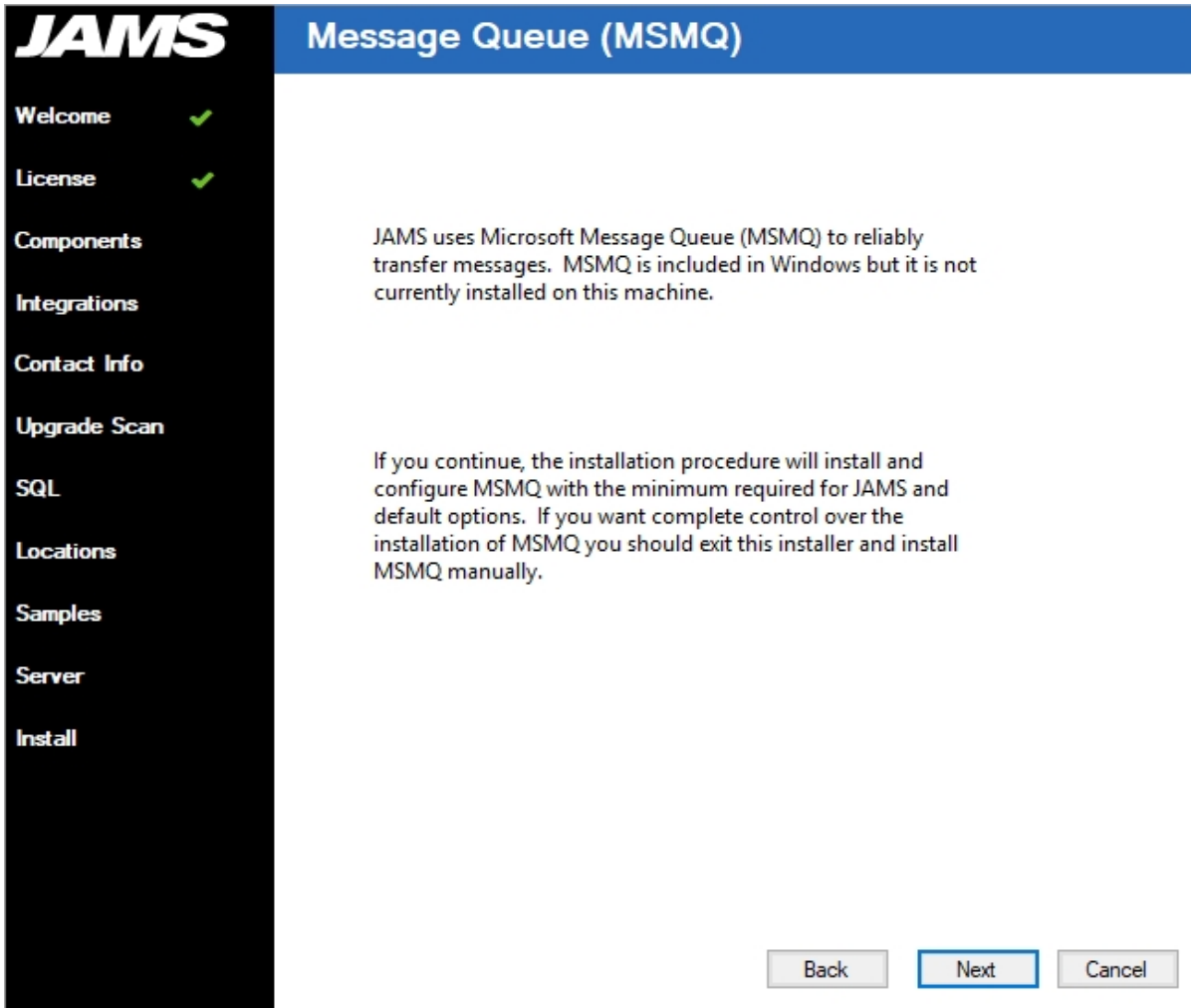
7. On the Core Components page, select the **JAMS Client** and **JAMS Scheduler** options.

8. Click **Next**.



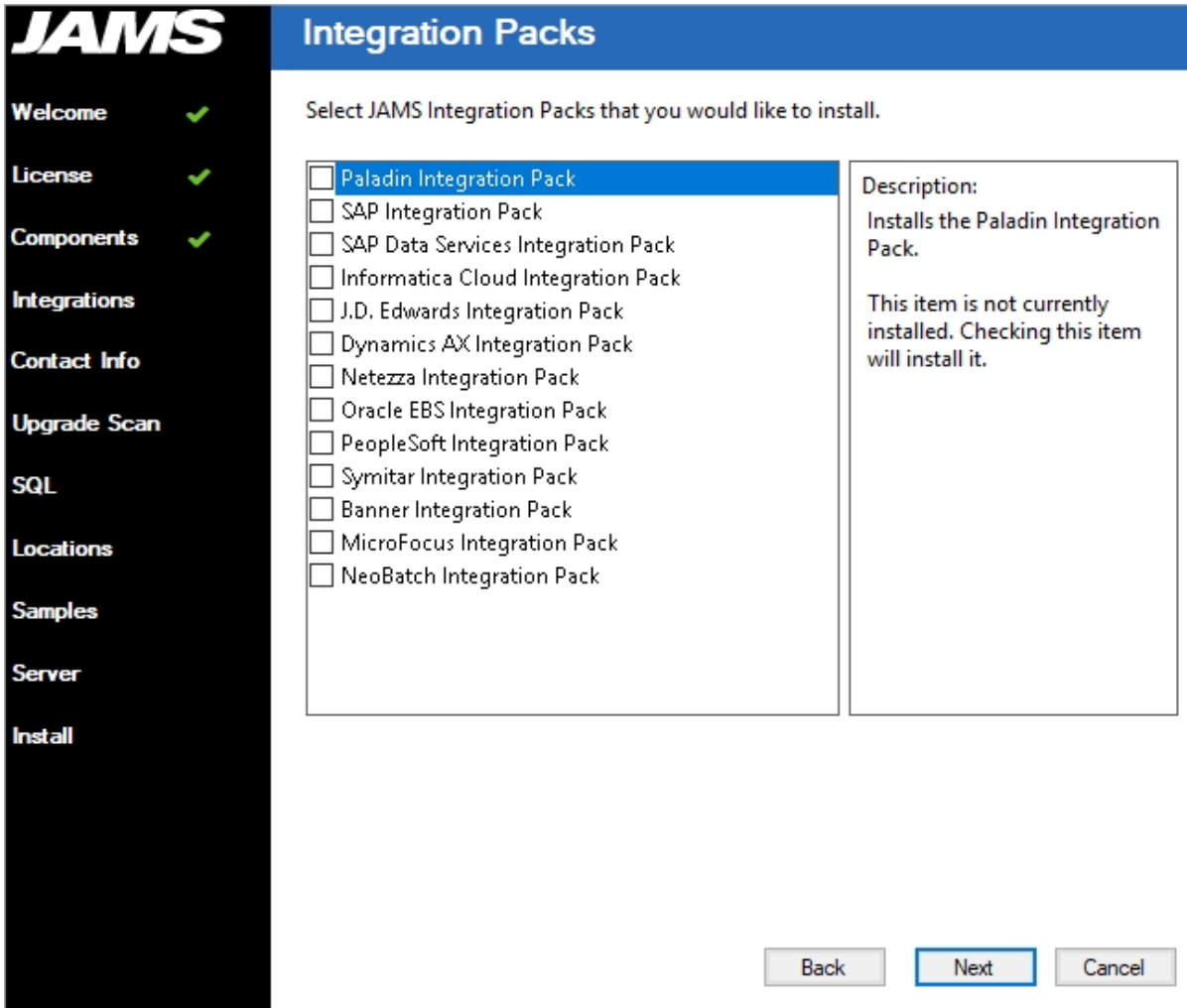
9. On the Message Queue (MSMQ) page, view the message regarding installing MSMQ.

10. Click **Next**.



11. On the Integration Packs page, select any required integrations.

12. Click **Next**.

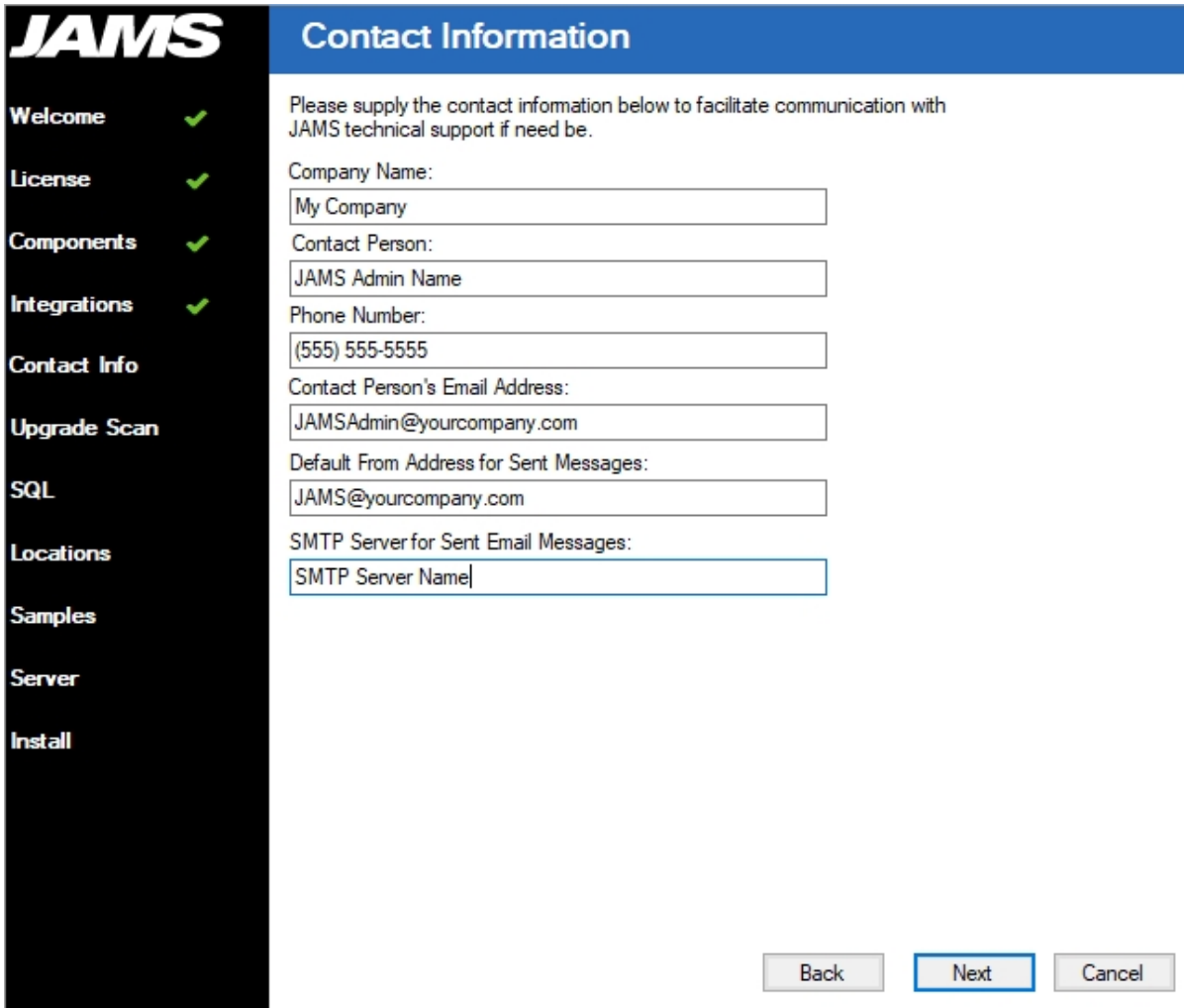


The screenshot shows the JAMS installation wizard's 'Integration Packs' screen. On the left is a dark sidebar with the JAMS logo and a list of steps: Welcome, License, Components, Integrations, Contact Info, Upgrade Scan, SQL, Locations, Samples, Server, and Install. The 'Integrations' step is highlighted. The main area has a blue header 'Integration Packs' and the instruction 'Select JAMS Integration Packs that you would like to install.' Below this is a list of integration packs, each with an unchecked checkbox. The 'Paladin Integration Pack' is selected, and its description is shown in a box on the right: 'Description: Installs the Paladin Integration Pack. This item is not currently installed. Checking this item will install it.' At the bottom right are three buttons: 'Back', 'Next' (which is highlighted with a blue border), and 'Cancel'.

Integration Pack	Description
<input type="checkbox"/> Paladin Integration Pack	Installs the Paladin Integration Pack. This item is not currently installed. Checking this item will install it.
<input type="checkbox"/> SAP Integration Pack	
<input type="checkbox"/> SAP Data Services Integration Pack	
<input type="checkbox"/> Informatica Cloud Integration Pack	
<input type="checkbox"/> J.D. Edwards Integration Pack	
<input type="checkbox"/> Dynamics AX Integration Pack	
<input type="checkbox"/> Netezza Integration Pack	
<input type="checkbox"/> Oracle EBS Integration Pack	
<input type="checkbox"/> PeopleSoft Integration Pack	
<input type="checkbox"/> Symitar Integration Pack	
<input type="checkbox"/> Banner Integration Pack	
<input type="checkbox"/> MicroFocus Integration Pack	
<input type="checkbox"/> NeoBatch Integration Pack	

13. On the Contact Information step, enter the information that will be used when working with Technical Support. Completing this page is optional but entering accurate information can help Technical Support improve its support capabilities. If you are unsure about the information, leave it blank and enter it at a later date.

14. Click **Next**.



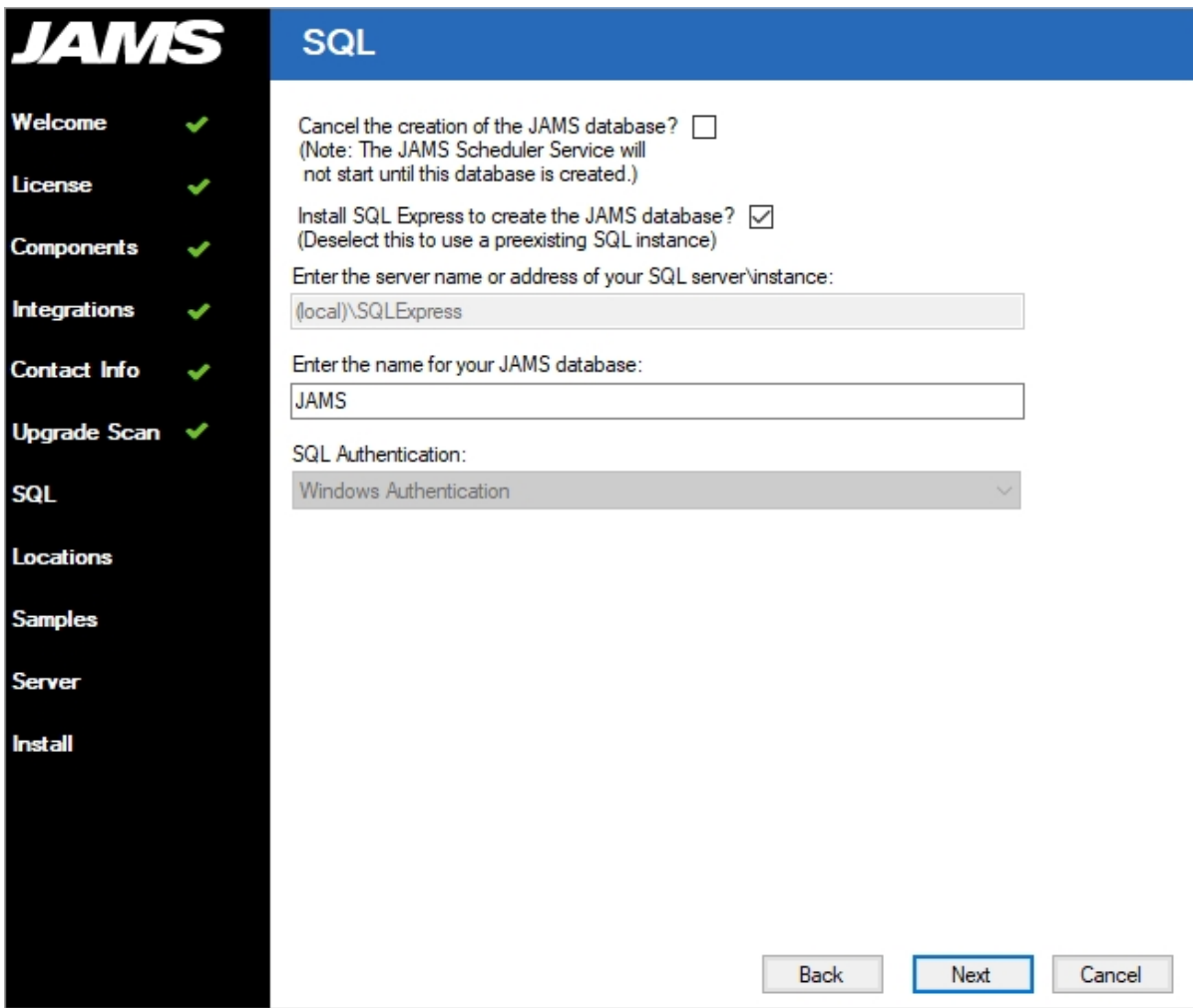
The image shows the JAMS installation wizard's 'Contact Information' screen. On the left is a dark sidebar with the JAMS logo at the top and a list of steps: Welcome, License, Components, Integrations, Contact Info, Upgrade Scan, SQL, Locations, Samples, Server, and Install. The first four steps are marked with green checkmarks. 'Contact Info' is the current step. The main area has a blue header 'Contact Information' and a text prompt: 'Please supply the contact information below to facilitate communication with JAMS technical support if need be.' Below this are several text input fields: 'Company Name' (containing 'My Company'), 'Contact Person' (containing 'JAMS Admin Name'), 'Phone Number' (containing '(555) 555-5555'), 'Contact Person's Email Address' (containing 'JAMSAdmin@yourcompany.com'), 'Default From Address for Sent Messages' (containing 'JAMS@yourcompany.com'), and 'SMTP Server for Sent Email Messages' (containing 'SMTP Server Name'). At the bottom right are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

15. On the SQL page, select the check box to install SQL Express locally to create the JAMS Database.

16. Enter the information to create the JAMS Database as well as the authentication method used to connect to it.

NOTE: Windows Authentication uses the Machine Account to connect to SQL Server after the initial install. The user performing the install needs to also have dbcreator rights for the JAMS Database to be created. The rights can be removed after the install is completed and the database is created.

If you select SQL Server Authentication, JAMS connects to SQL with these credentials. The credentials are saved in the Common.config file located at C:\Program Files\MVPS\JAMS\Scheduler.



The image shows the JAMS SQL configuration window. On the left is a dark sidebar with the JAMS logo and a list of menu items: Welcome, License, Components, Integrations, Contact Info, Upgrade Scan, SQL, Locations, Samples, Server, and Install. The 'SQL' item is highlighted. The main area has a blue header with the word 'SQL'. Below the header, there are several configuration options: a checkbox for 'Cancel the creation of the JAMS database?' (unchecked), a checkbox for 'Install SQL Express to create the JAMS database?' (checked), a text field for 'Enter the server name or address of your SQL server\instance:' containing '(local)\SQLEXPRESS', a text field for 'Enter the name for your JAMS database:' containing 'JAMS', and a dropdown menu for 'SQL Authentication:' set to 'Windows Authentication'. At the bottom right are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

JAMS

SQL

Cancel the creation of the JAMS database? ☐

(Note: The JAMS Scheduler Service will not start until this database is created.)

Install SQL Express to create the JAMS database? ☒

(Deselect this to use a preexisting SQL instance)

Enter the server name or address of your SQL server\instance:

(local)\SQLEXPRESS

Enter the name for your JAMS database:

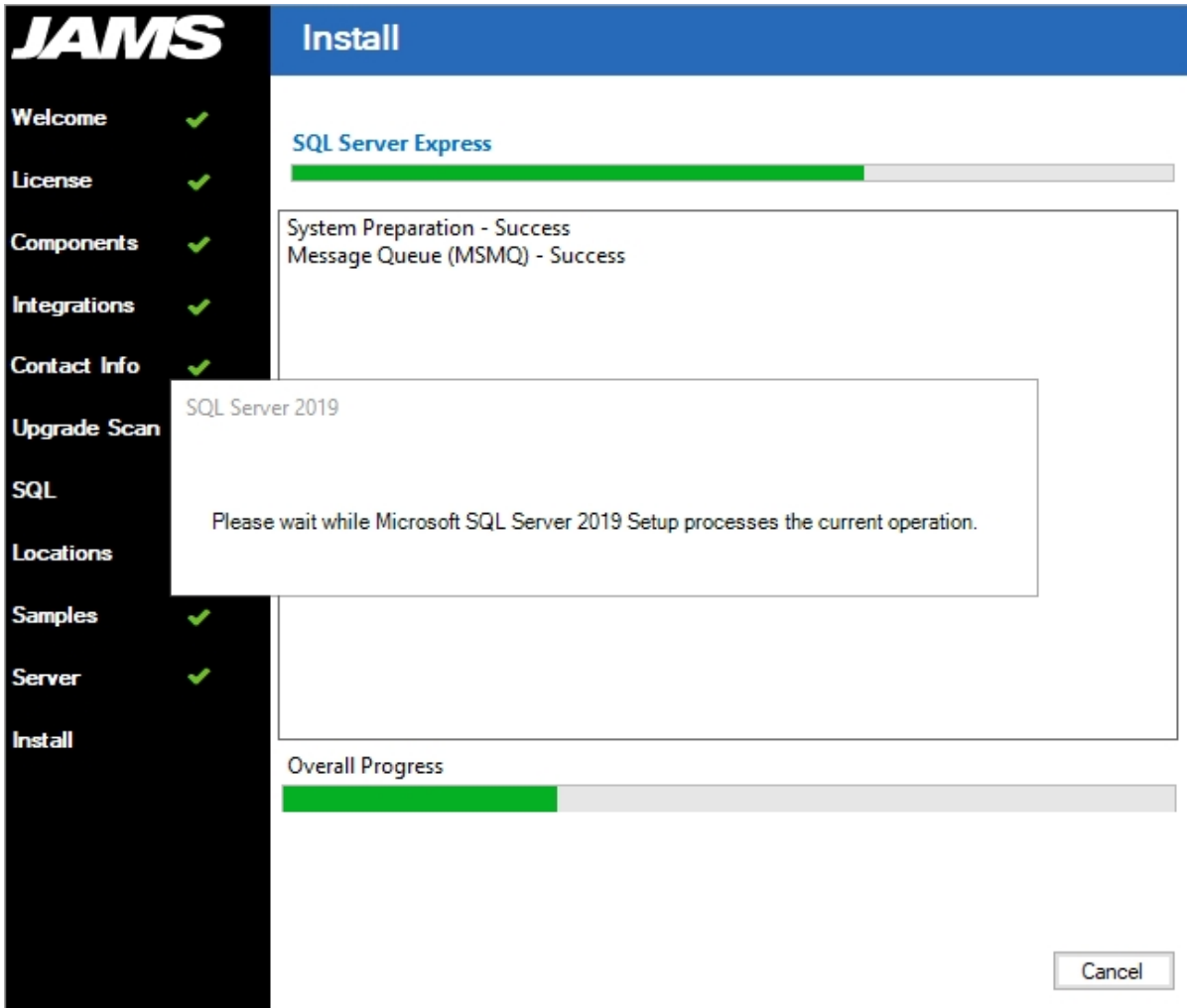
JAMS

SQL Authentication:

Windows Authentication

Back Next Cancel

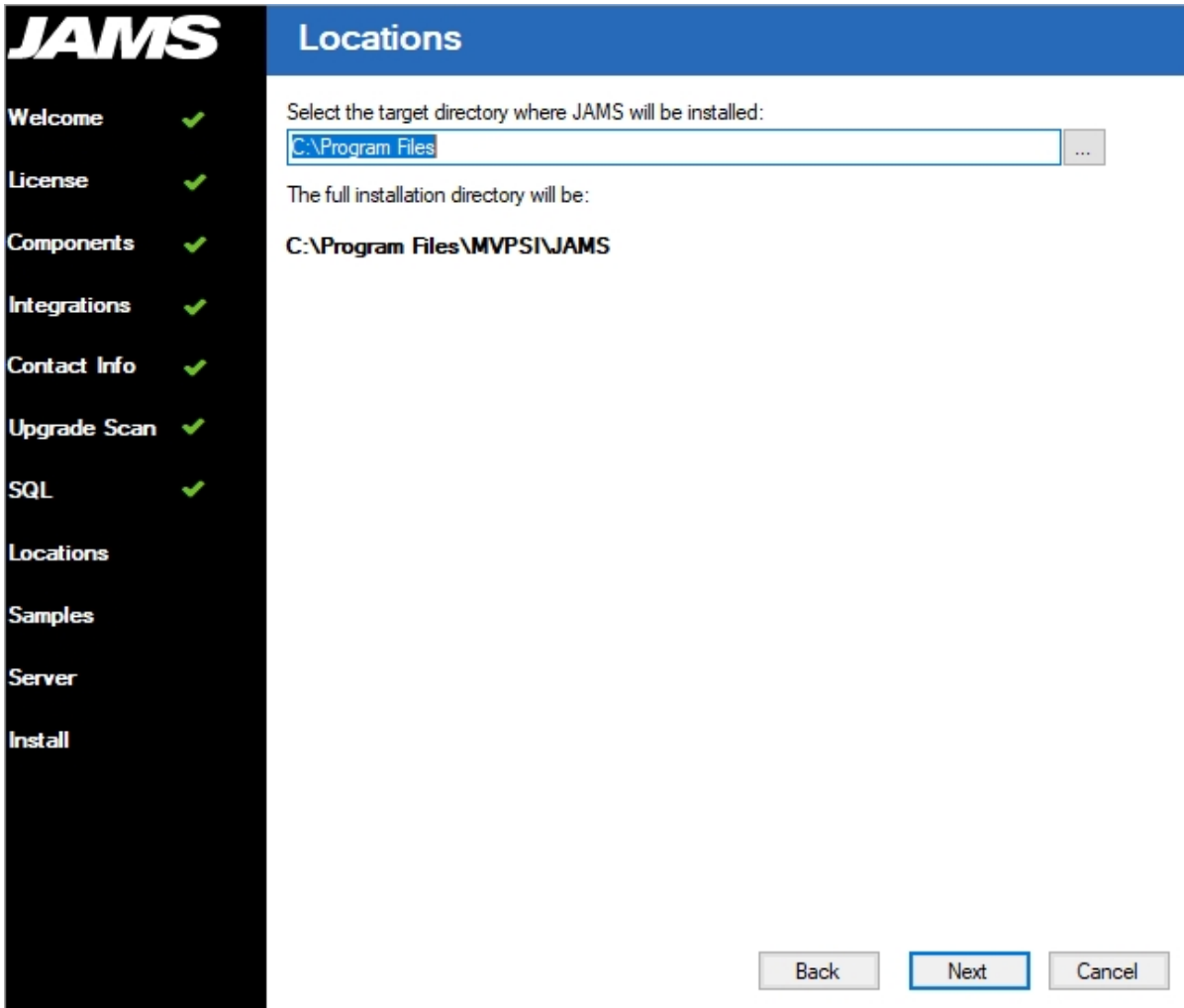
17. Click **Next**.



NOTE: Users should NEVER attempt to manually create the JAMS Database.

18. On the **Locations** page, accept the target directory where JAMS will be installed. The directory can be adjusted, but doing this may require additional customization of some features in JAMS.

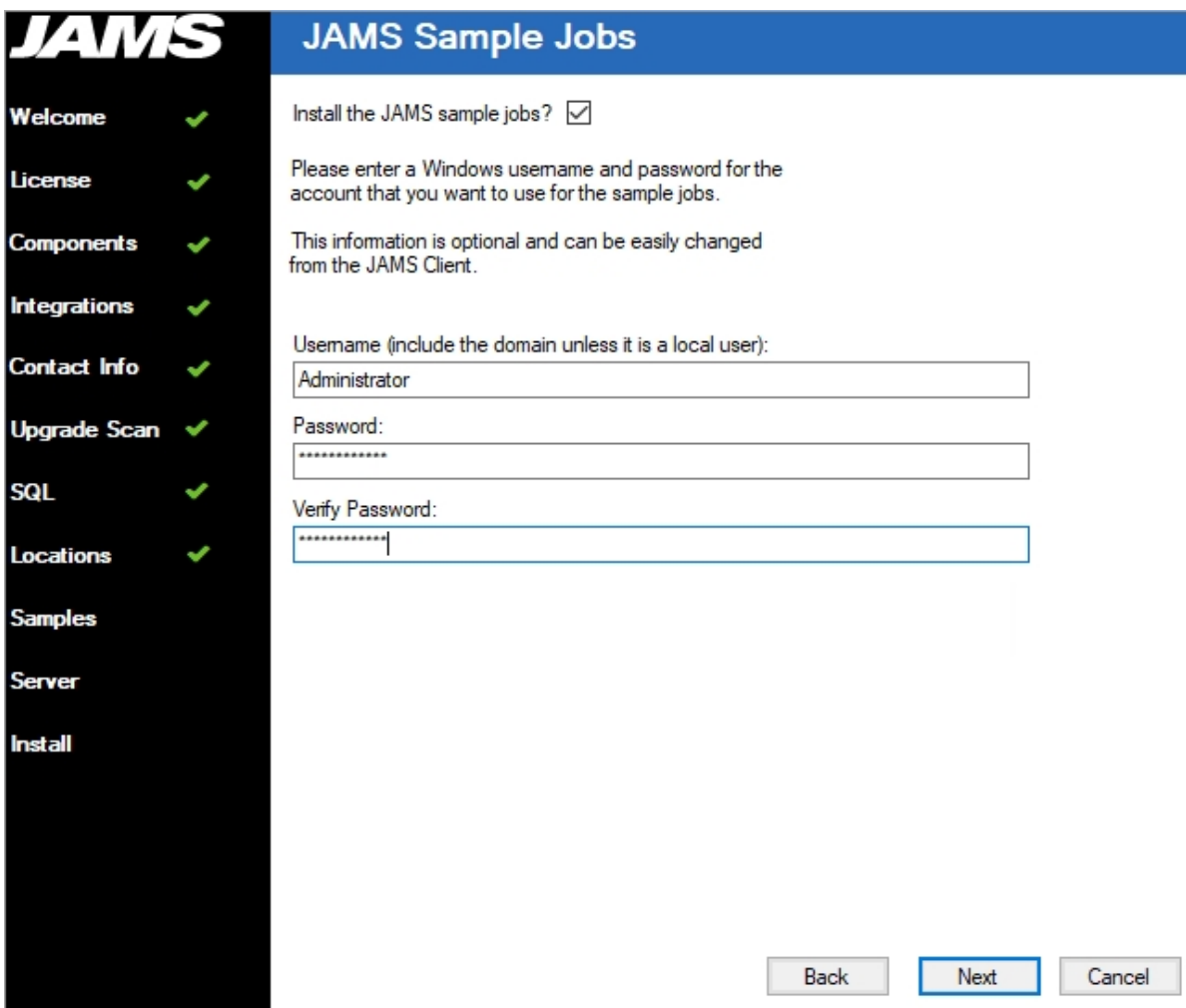
19. Click **Next**.



The screenshot shows the JAMS installation wizard's 'Locations' screen. On the left is a black sidebar with the JAMS logo at the top. Below the logo is a list of installation steps: Welcome, License, Components, Integrations, Contact Info, Upgrade Scan, SQL, Locations, Samples, Server, and Install. Each step has a green checkmark to its right. The 'Locations' step is currently selected. The main area of the window has a blue header with the word 'Locations'. Below the header, it says 'Select the target directory where JAMS will be installed:' followed by a text box containing 'C:\Program Files' and a browse button (...). Below this, it says 'The full installation directory will be:' followed by the text 'C:\Program Files\MVPSI\JAMS'. At the bottom right of the window are three buttons: 'Back', 'Next' (which is highlighted with a blue border), and 'Cancel'.

20. On the JAMS Sample Jobs page, select the checkbox to install sample jobs.
21. Define a JAMS user to run the sample Jobs. This is required because it sets the Execute As property for the Jobs.

22. Click **Next**.



The image shows the 'JAMS Sample Jobs' installation window. On the left is a dark sidebar with the 'JAMS' logo at the top and a list of installation steps: Welcome, License, Components, Integrations, Contact Info, Upgrade Scan, SQL, Locations, Samples, Server, and Install. The first seven steps are marked with green checkmarks. The 'Install' step is currently selected. The main area has a blue header 'JAMS Sample Jobs'. Below it, the text 'Install the JAMS sample jobs?' is followed by a checked checkbox. A message states: 'Please enter a Windows username and password for the account that you want to use for the sample jobs. This information is optional and can be easily changed from the JAMS Client.' There are three input fields: 'Username (include the domain unless it is a local user):' with 'Administrator' entered, 'Password:' with '*****' entered, and 'Verify Password:' with '*****' entered. At the bottom right are three buttons: 'Back', 'Next' (highlighted with a blue border), and 'Cancel'.

Step	Status
Welcome	✓
License	✓
Components	✓
Integrations	✓
Contact Info	✓
Upgrade Scan	✓
SQL	✓
Locations	✓
Samples	
Server	
Install	

JAMS Sample Jobs

Install the JAMS sample jobs? ☒

Please enter a Windows username and password for the account that you want to use for the sample jobs. This information is optional and can be easily changed from the JAMS Client.

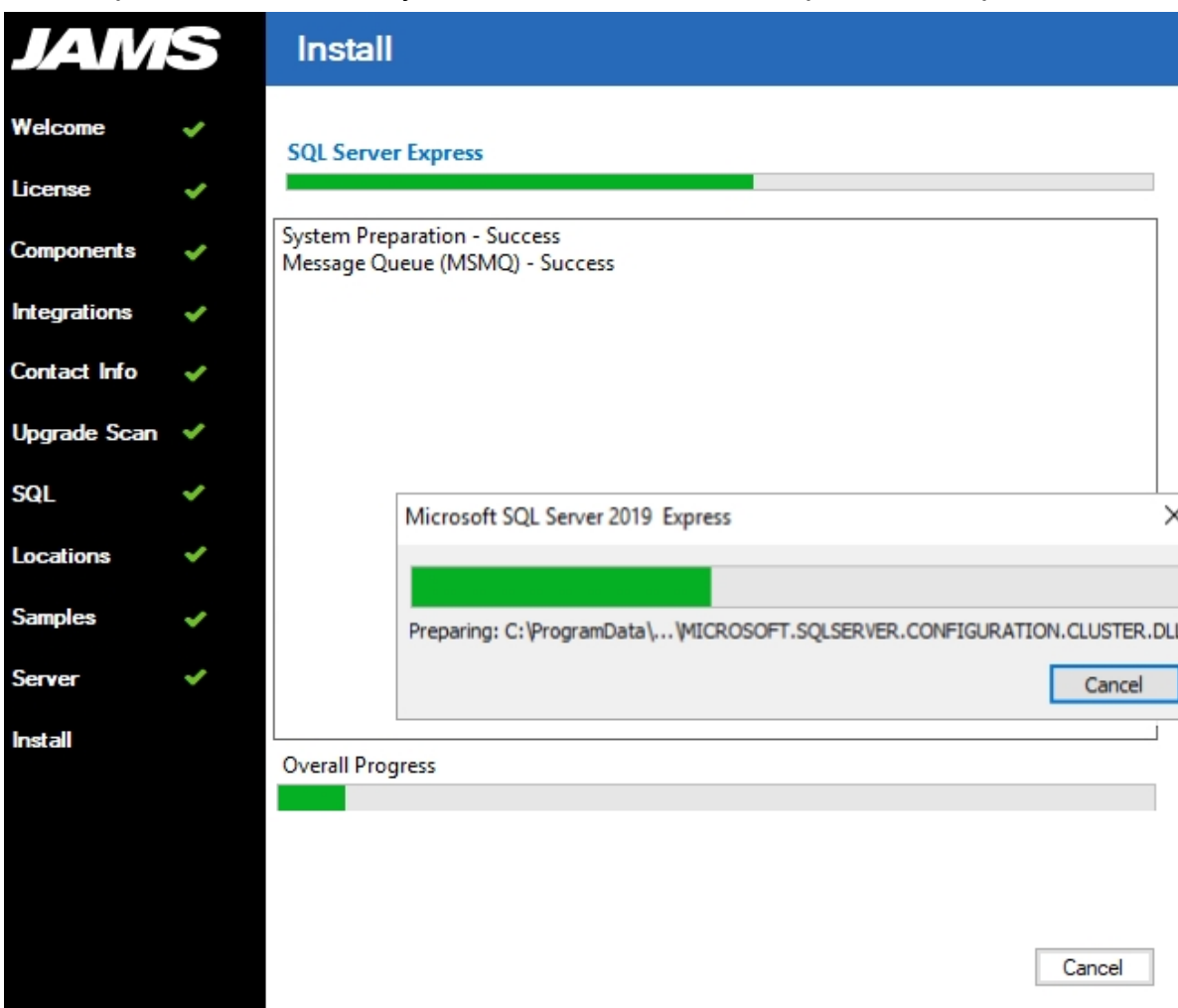
Username (include the domain unless it is a local user):

Password:

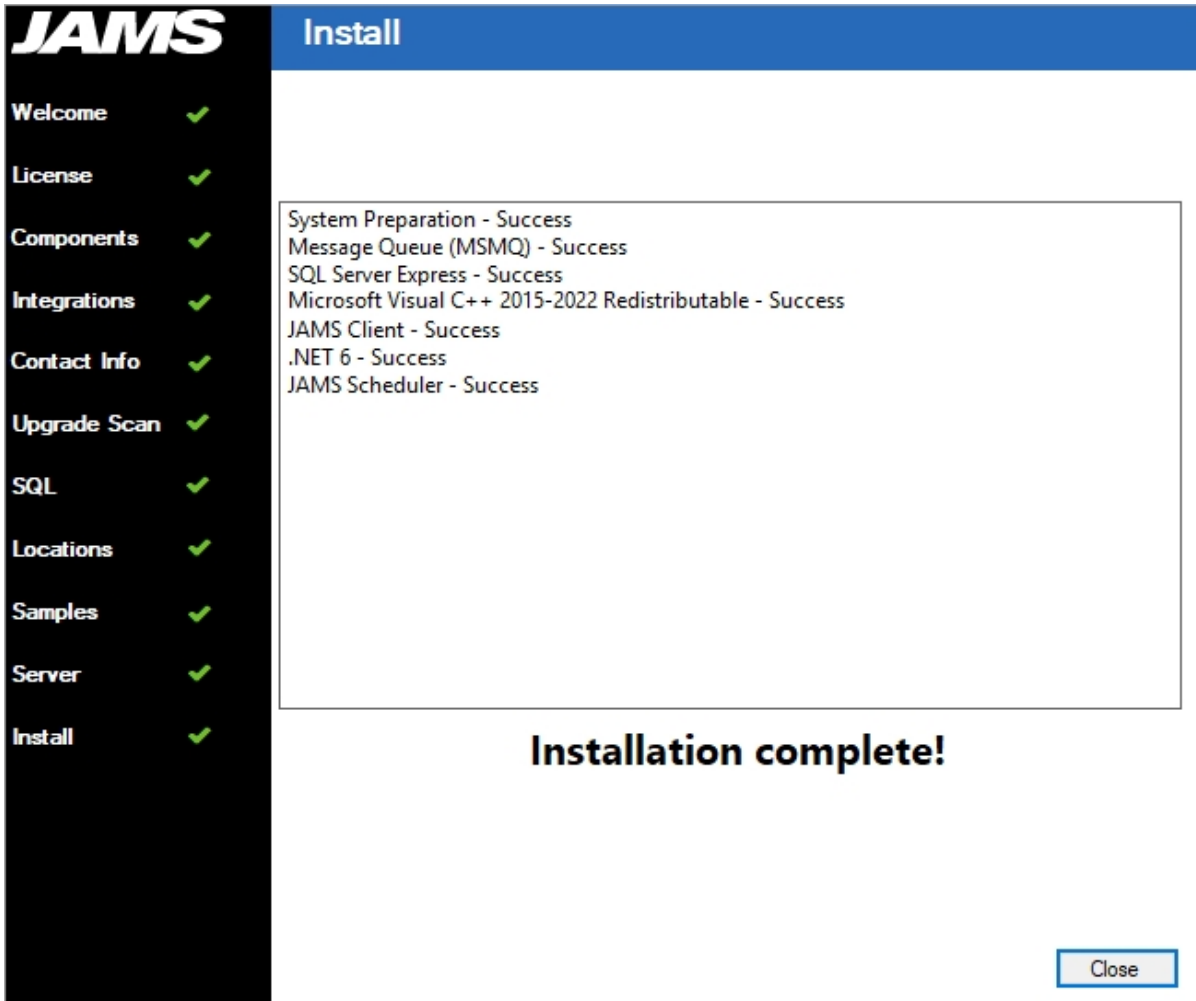
Verify Password:

23. Click **Next**. The installation begins.

24. View the progress of the installation. You may also see a progress bar displaying the SQL Express installation, if you selected to install it in a previous step.



25. On the Install page, click **Close** after the installation is completed.



Applying the JAMS License

JAMS licenses are sent out as XML files. To apply a JAMS license, copy the license key file(s) into the C:\Program Files\MVPSI\JAMS\Scheduler directory. No other actions should be necessary.

If a license is properly placed in the C:\Program Files\MVPSI\JAMS\Scheduler directory and it is not recognized, the license file may be blocked by the File Blocking feature in Windows. To check the status and unblock files:

1. Right-click the license file and select **Properties**.
2. In the Properties dialog, ensure the General tab is selected.

3. Check the lower right corner to see if an **Unblock** button is displayed. If it is displayed, the file is blocked. Otherwise, the file is not blocked.
4. Click **Unblock**.
5. Click **OK** or **Apply** to save the changes.

If the license file is not recognized and is not blocked, restart the JAMS Scheduler Service:

1. Close the JAMS Client.
2. Open Windows Services on the JAMS Server.
3. Restart the JAMS Scheduler Service.
4. Open the JAMS Client. The license should be recognized. If problems persist, contact Technical Support.

For more information about the JAMS license, see [Licenses in JAMS](#).

Opening the JAMS Client

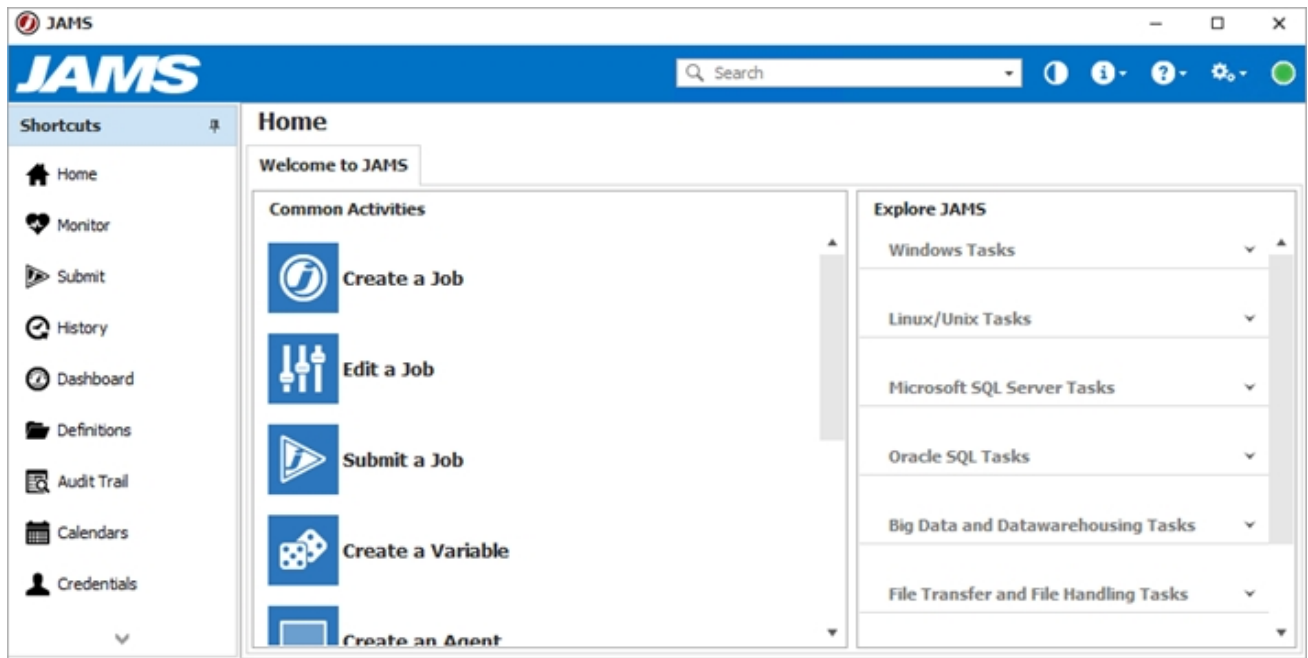
After you have installed JAMS, you can open the application. It is recommended that you run the JAMS Client as an Administrator.

1. Click the Windows Start menu.
2. Right-click **JAMS Client** and select **More | Run as administrator**.

JAMS Client Overview

The JAMS Client is the main tool for working with Jobs. Available as either a Windows or Web application, the JAMS Client enables you to interact with the JAMS Scheduler and JAMS Database.

The JAMS Client has several key areas that you can use.



Shortcuts Menu

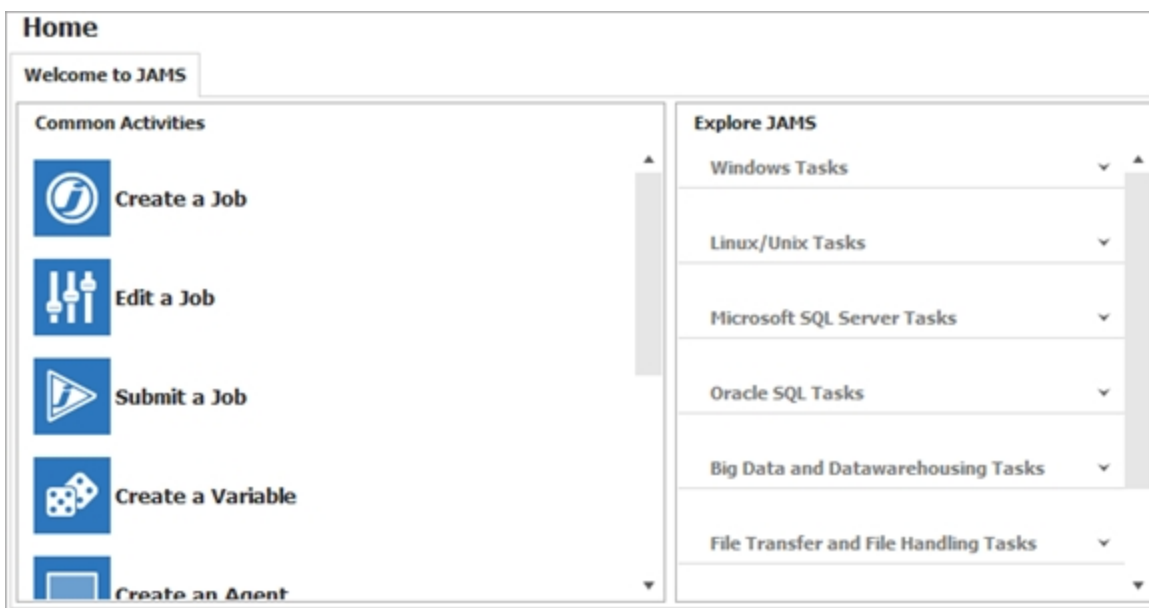
The Shortcuts menu is located on the left side of the screen and provides quick access to the main actions within JAMS. You can drag-and-drop items in the Shortcuts menu to change the order so the most used items are at the top.

For this Getting Started Guide, we will use only the Shortcut options listed below:

Shortcut Menu Option	Description
Credentials	The Credentials Shortcut lets you add, modify, or delete user Credentials. Credentials control the users' level of access within JAMS.
Definitions	The Definitions Shortcut lets you create Job Definitions, Folder Definitions, and Variable Definitions.
Monitor	The Monitor Shortcut lets you see the Jobs that are currently running and the Jobs that have completed. The Monitor keeps a log of all the Jobs that have run in the last 10 minutes along with their final status, such as Success or Failed.

Home Screen






The Home screen area displays links to some of the common tasks within the application, such as creating or editing a Job.



Status Bar

The Status Bar is located in the top right corner of the screen and includes a search bar to let you quickly search for items in your JAMS system. See the table below for more information about each option in the Status Bar.



Icon	Description
	Change the theme/color of the JAMS Client from light to dark. Additional color options can be selected from the Configuration shortcut.
	View the version number for the JAMS Client and the connected JAMS Scheduler.
	View the Help documentation for JAMS.
	Add, edit, or remove connections to JAMS Schedulers.
	View the status of the connected JAMS Scheduler from the colored status indicator. A green indicator means the Client is connected to the Scheduler. A red indicator is displayed if the JAMS Client is not connected to the JAMS Scheduler or if a license file is missing. You can also hover your cursor over this status indicator to view a tooltip with more information.

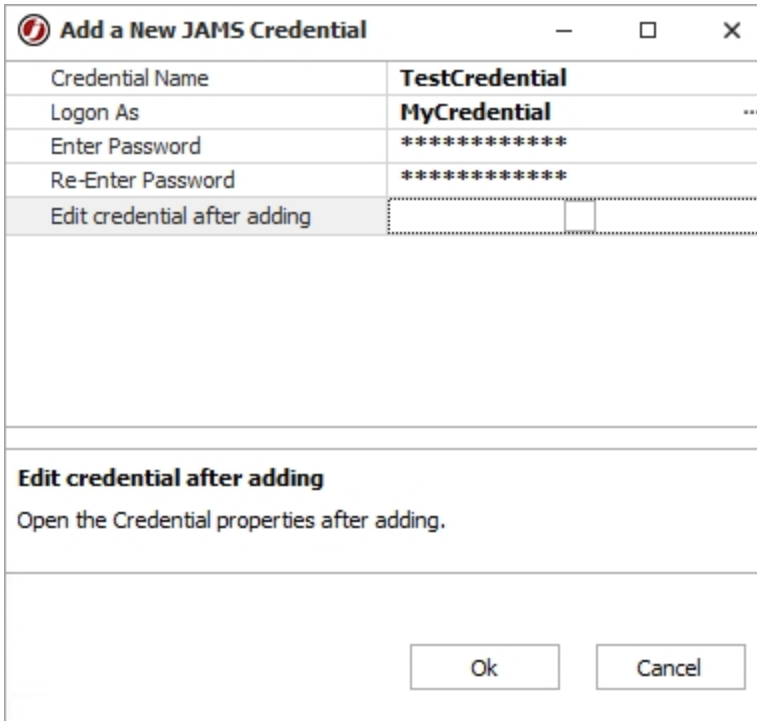
Using Credentials

Before you can create and run a Job, you must create a Credential. This allows you to control who can run Jobs in your system. A Credential has a Display Name, Logon As name, and a password or a key. You can assign a Credential to a Job or a Folder. If you want to control a group of Jobs, you can assign a Credential at the Folder level to control all Jobs within the Folder.

A Credential needs to be set on each Job in JAMS. The **Execute As** property on the Job is used to specify the Credential.

Creating a Credential

1. Click **Credentials** in the Shortcuts menu.
2. Click **+**.
3. In the Credential Name field, enter a Credential name, such as **TestCredential**.
4. In the Logon As field, enter a Logon As name if the name used when logging on is different than the Credential Name.
5. In the Enter Password and Re-Enter password fields, enter a password.
6. In the Edit credential after adding field, clear the checkbox.

7. Click **Ok**.

Add a New JAMS Credential	
Credential Name	TestCredential
Logon As	MyCredential
Enter Password	*****
Re-Enter Password	*****
Edit credential after adding	

Edit credential after adding
Open the Credential properties after adding.

Ok Cancel

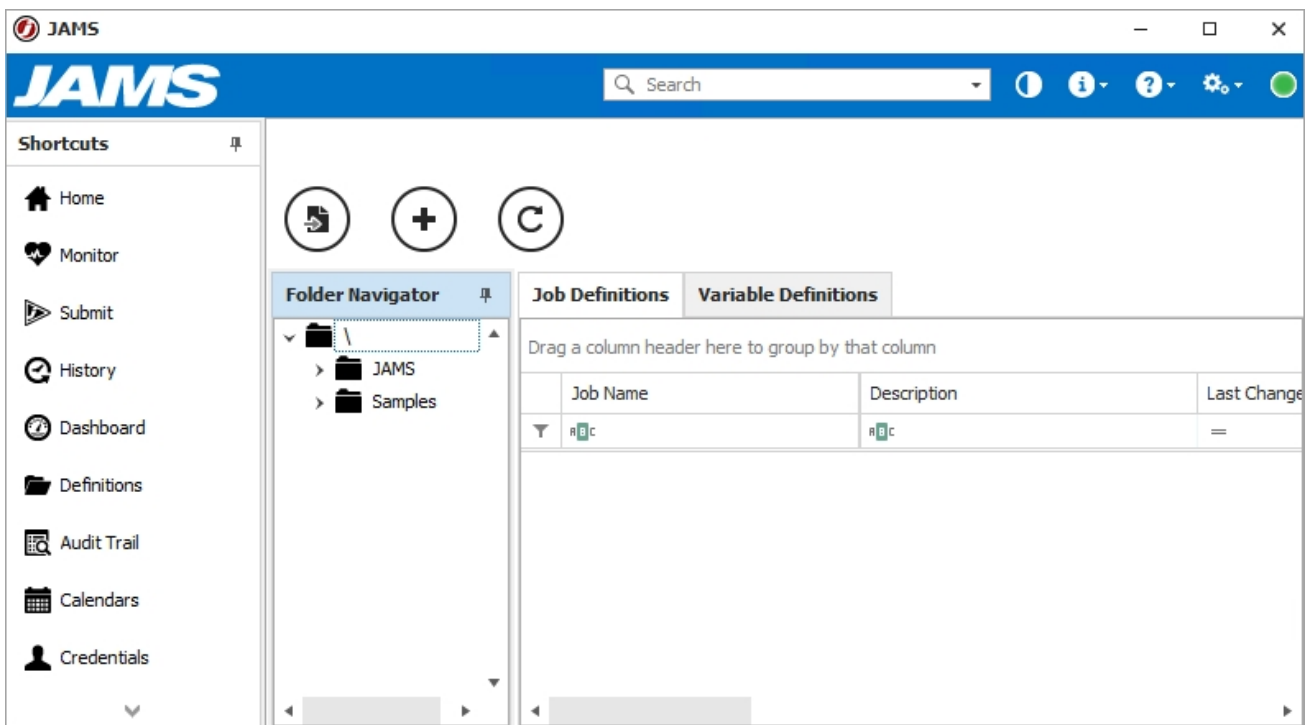
Using Definitions

In JAMS, many items are organized as Definitions. The Definitions Shortcut menu lets you create Job Definitions, Folder Definitions, and Variable Definitions. Folder Definitions store all the Job Definitions in JAMS. You can create any hierarchy or organization using Folders. For example, you may want to create an Accounting Folder to store all Job Definitions related to that team. You can also create subfolders to provide additional levels.

The Folder Navigator is where you can create, edit, or delete Folders. As a best practice, create new Folders to store your Job Definitions and avoid saving Job Definitions in the root Folder.

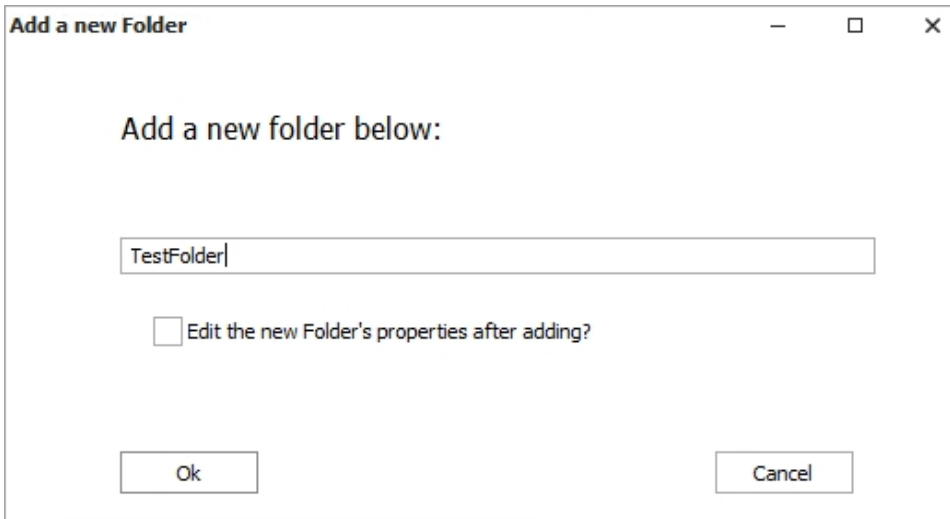
By default, JAMS has a root Folder that is displayed by \ that contains two Folders:

- **Samples Folder:** The Samples Folder has sample Jobs that you can run.
- **JAMS Folder:** The JAMS Folder has template Jobs that are used for common actions, such as watching for a file.



Creating a Folder

1. Click **Definitions** from the Shortcuts menu.
2. Right-click the root Folder (/) and select **Add Folder**.
3. In the Add a new folder dialog, enter a name, such as **TestFolder**.



4. Click **Ok**. The TestFolder is displayed under the root Folder at the same level as the JAMS and Sample Folders.

Creating a Scheduled Job

Before starting this exercise, it is important to note that Jobs will appear in the Monitor for only 10 minutes after the Job has executed (run) independent of its status. We encourage you to work through uninterrupted to avoid repeating the exercise.

1. In the Job Definitions tab, right-click **TestFolder** and select **Add Job**. The Add a New JAMS Job Definition screen is displayed.
2. In the Folder field, ensure **\TestFolder** is displayed.
3. In the Name field, enter a name, such as **TestScheduledJob**.
4. In the Description field, enter a short description, such as **This Job runs on a daily basis**.
5. In the Execution Method field, ensure **Command** is displayed.
6. In the Edit this job definition after adding field, ensure the check box is selected.

7. Click **Ok**. The Source tab for the Job is displayed.

Add a New JAMS Job Definition	
Folder	\TestFolder
Name	TestScheduledJob
Description (optional)	This Job runs daily.
Execution Method	Command
Edit this job definition after adding	<input checked="" type="checkbox"/>
Scheduled Date (optional)	
Calendar (optional)	[Select a Calendar]
Scheduled Time (optional)	12:00 AM
<p>Edit this job definition after adding</p> <p>When checked, the full job definition is opened for edit after the job is added.</p>	
<p>Ok Cancel</p>	

8. In the Source tab, enter **Echo "Hello World!"**.

9. Click the **Schedule** tab.

10. Click **+**

11. Select **Run this job | on a schedule**.

12. In the Enabled field, ensure the checkbox is selected.

13. In the Scheduled Date field, enter **Daily**.

14. In the Scheduled Time field, enter a time one hour from now. For example, if the time is 11:30am, enter 12:30pm. If you are using a virtual machine, use the time on that

machine as your reference.

Run this job on a schedule...

Status

Enabled	<input checked="" type="checkbox"/>
---------	-------------------------------------

Schedule

Scheduled Date	Daily
Scheduled Time	12:30 PM
Time Zone	

Exceptions

Except For Date	
Start Date	
End Date	
Non-Workday Scheduling	Schedule

Override

Calendar	
Execute As	
Agent	
Batch Queue	

Scheduled Time

The time of day when the Job should start.

Finish Cancel

15. Click **Finish**. This Schedule Item is listed under the "run this job... (1 enabled)" section on the Schedule tab.
16. Click the **Properties** tab.
17. In the Execute As field, select the Credential that you created (**TestCredential**).
18. Click **Save and Close**. The TestScheduledJob is now available in the TestFolder.

Creating an Unscheduled (Ad hoc) Job

Before starting this exercise, it is important to note that ad hoc Jobs will appear in the Monitor for only 10 minutes after the Job has executed (run) independent of its Status. We encourage you to work through uninterrupted to avoid repeating the exercise.

1. In the Job Definitions tab, right-click **TestFolder** and select **Add Job**. The Add a New JAMS Job Definition screen is displayed.
2. In the Folder field, ensure **TestFolder** is displayed.
3. In the Name field, enter a name, such as **TestUnscheduledJob**.
4. In the Description field, enter a short description, such as **This Job runs as needed**.
5. In the Execution Method field, ensure **Command** is displayed.
6. In the Edit this job definition after adding field, ensure the check box is selected.

7. Click **Ok**. The Source tab for the Job is displayed.

Add a New JAMS Job Definition	
Folder	\TestFolder
Name	TestUnscheduledJob
Description (optional)	This Job runs as needed.
Execution Method	Command
Edit this job definition after adding	<input checked="" type="checkbox"/>
Scheduled Date (optional)	
Calendar (optional)	[Select a Calendar]
Scheduled Time (optional)	12:00 AM

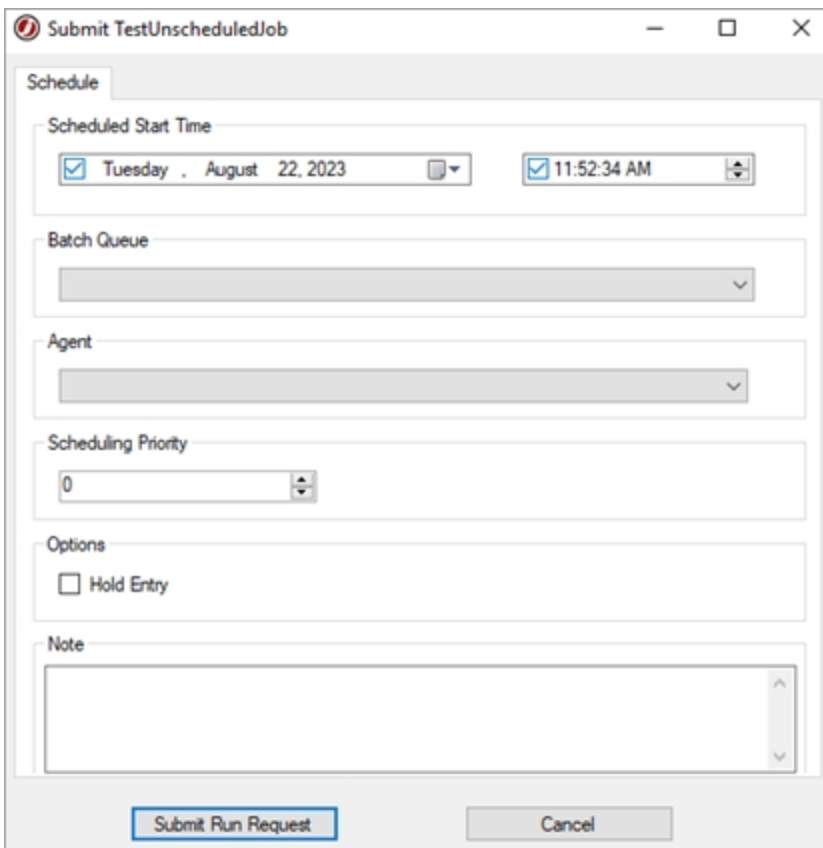
Edit this job definition after adding
When checked, the full job definition is opened for edit after the job is added.

Ok Cancel

8. In the Source tab, enter **Echo "Hello World!"**.
9. Click the **Properties** tab.
10. In the Execute As field, select the Credential that you created (**TestCredential**).
11. Click **Save and Close**. The TestUnscheduledJob is now available in the TestFolder.

Running an Unscheduled (Ad hoc) Job

1. In the Definitions screen, click the **TestFolder**.
2. Right-click the **TestUnscheduledJob** and select **Submit**. The Submit TestUnscheduleJob dialog is displayed.
3. Click **Submit Run Request**.



4. Click **OK** on the Submit Job dialog. The Job is submitted to run and is displayed in the Monitor.
5. Click **Monitor** from the Shortcut menu.

Using the Monitor

The Monitor enables you to view Jobs that are running or that have completed within the last 10 minutes. It also provides access to comprehensive Job management tools.

You may not see your Job in the Monitor view in the following situations:

- If your scheduled Job has completed more 10 minutes prior to beginning this exercise, it will not appear in the Monitor until its next scheduled time.
- If your scheduled Job is not scheduled to run within the next 60 minutes, it will not appear in the Monitor. This specific Job will appear in the Monitor within 60 minutes of its scheduled run time.

Monitor Classic and Monitor Grid

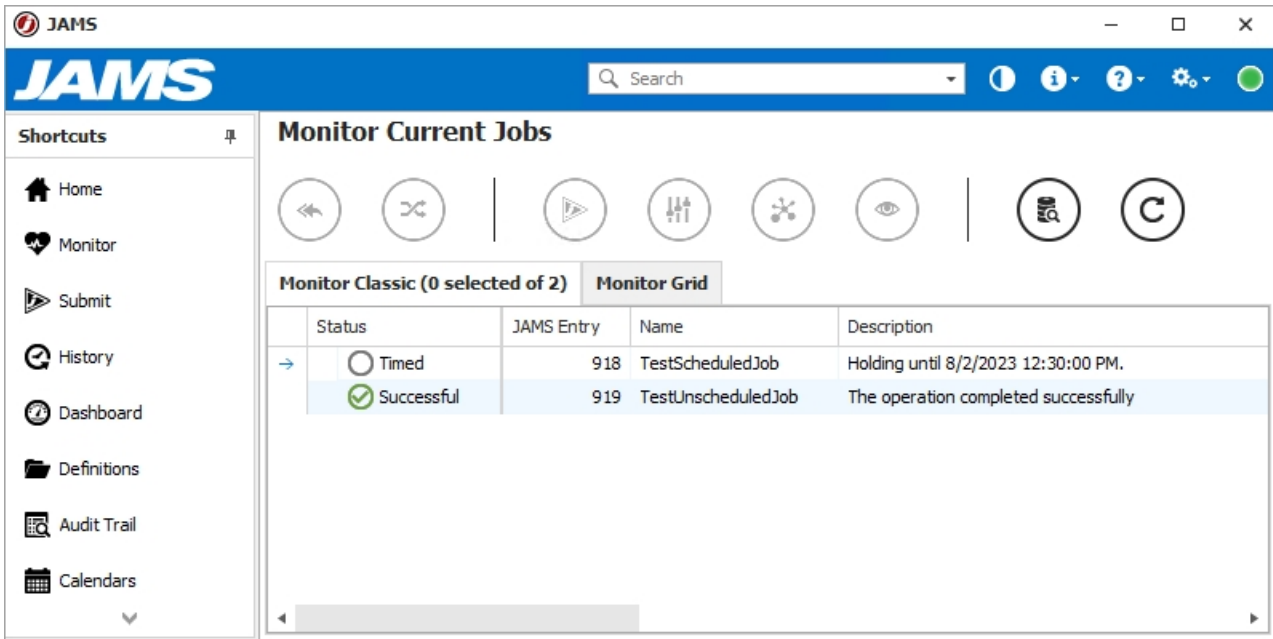
The Monitor has two different display options: Monitor Classic and Monitor Grid. The Monitor Classic is the default view and displays the Jobs in a list format. The Monitor Grid view displays the Jobs in a format similar to a spreadsheet with cells in a grid.

You can drag and drop columns to reorder the columns, if needed.

Viewing the Jobs in the Monitor View






1. Click **Monitor** from the Shortcuts menu.
2. Click the **Monitor Classic** tab.
3. View the **TestUnscheduledJob** in the Monitor view.
4. Verify the Status column displays **Successful**.



5. Verify the **TestScheduledJob** is displayed in the Monitor and the Status column displays **Timed**. It will remain in this state until the time it is specified to run.



Monitor View Icons

Every Job contained in the Monitor view includes an icon showing the current state of each entry as listed in the table below.

Icon	Description
	The Job completed with an Informational or Successful completion status.
	The Job is waiting on a dependency or the Job is held.
	The Job completed with a Warning completion status.
	The Job failed with a Stalled, Error, or Fatal completion status.
	The Job is currently running, or it is a File Watch Job that executes indefinitely to poll for files that are used for triggers or dependencies.

Icon	Description
	The Job completed with an Informational completion status.
	The Job is pending or it is waiting for its designated start time.

Troubleshooting Jobs

There are a number of reasons why your Job may not behave as you expect. Common configuration issues, such as those listed below, could be causing the problems.

- The Job does not have a Credential specified in the Execute As field on the Properties tab.
- The Credential defined on your Job might not have permissions to perform the actions defined on the Job.
- One or more the following could be disabled:
 - Folder
 - Job
 - Schedule
- The time zone of your JAMS Scheduler may not match the time zone you are working in.
- Your license may not allow for additional Job executions.
- Changes to the schedule of your Job might not have been saved.
- Your Job might not be scheduled to run within the next 60 minutes.