

IDRuns Tutorial

Learn IDRuns by doing. Each section is one task, with the screens you will see and the clicks to get there.

New here? Do sections 1 to 4 in order - about fifteen minutes - and you will have found your way around, read the day's runs, created a job and run it. The rest can be read in any order. The [User Guide](#) is the reference for every option; this tutorial is the guided tour.

About the screenshots. They were taken on a fresh test install with the sample jobs that come with it, in the *Coastal* colour scheme and the *Command Center* layout. Your colours, and the navigation if an administrator chose another layout, may differ; the screens and options are the same. The AI suggestions shown in sections 5 and 9 are illustrative - what you get depends on your request and your AI model.

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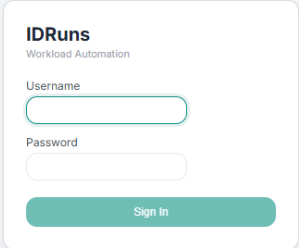
Words you will see

Word	Meaning
Job	One thing to run: a command, a file transfer, an approval, and so on.
Job Group	A folder of jobs and other groups. Settings you put on a group (calendar, agent, time window) are inherited by what is inside it.
Agent	A computer that runs jobs. Master (this server) is the one built into IDRuns.
Calendar	Which days a job is eligible to run (weekdays, month end, and so on).
Production date	The business day the runs belong to. Job Activity shows one production date at a time.

Word	Meaning
Run	One execution of a job on a production date. Definitions are what you design; runs are what happened.
Workgroup	The team that owns a definition and decides who may change it.
Orchestration	A pipeline of steps - jobs, scripts, decisions, loops, approvals - run as one unit.

1. Sign in and find your way around

Open IDRuns in your browser, enter your user name and password, and select **Sign in**.

A screenshot of the IDRuns Workload Automation sign-in interface. The interface is a white card with rounded corners centered on a light gray background. At the top, it says "IDRuns" in bold, with "Workload Automation" in smaller text below it. There are two input fields: "Username" and "Password", both with light blue borders. Below the password field is a teal "Sign In" button.

The first couple of times you sign in, a short welcome appears.

The screenshot shows the IDRuns 'Job Activity' page. A 'Welcome to IDRuns' modal is open, displaying a 'Getting started' section with five shortcuts: 'See what is running today', 'Browse the sample jobs', 'Check the schedule', 'Invite a teammate', and 'Read the full guide'. The modal also includes a 'Got it' button. The background page features a sidebar with navigation options like 'Operations', 'Orchestration Runs', 'Event Activity', 'Alerts', 'Logs', 'Schedules', and 'Master Status'. The main content area shows a 'Job Activity' table with columns for Job No., Name, Run ID, Instance, Rerun Count, Events Triggered, Status, Agent, and Calendar. The table lists 11 records, including various health checks and workflows.

Getting started

Welcome to IDRuns

A few suggestions to get oriented are pinned below the header - dismiss them any time, or work through them at your own pace. They'll stop appearing automatically after your first couple of sign-ins.

See what is running today
Job Activity shows everything waiting, running, completed, or failed today.

Browse the sample jobs
Browse the sample jobs to see what is running today.

Check the schedule
Check the schedule to see when jobs are running.

Invite a teammate
Create an Interactive User for anyone else who needs to sign in.

Read the full guide
Browse every topic at your own pace, any time.

Got it

Production Date: 10/01/2020

Job Activity | 11 Records | Search... | Saved filters: No filters

Job No.	Name	Run ID	Instance	Rerun Count	Events Triggered	Status	Agent	Calendar
014500...	Health Check - API Endpoint	1	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
014500...	Health Check - API Endpoint	192	2	0	0	Completed Normally...	Master (this ser...	Every Day (D...
014500...	Health Check - Database Connection	2	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
01450045	Disk Space Monitor	3	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
014500...	Ping External Partner Service	4	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
01450047	Check License Expiration	5	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
01450001	Nightly ETL Pipeline	6	1			Completed Normally...	Master (this ser...	Every Day (D...
01450013	Nightly Reports	18	1			Completed Normally...	Master (this ser...	Every Day (D...
01450020	File Processing	25	1			Completed Normally...	Master (this ser...	Every Day (D...
01450028	System Maintenance	33	1			Completed Abnormally	Master (this ser...	Every Day (D...
01450036	Customer Onboarding Workflow	41	1			Completed Normally...	Master (this ser...	Every Day (D...

Select **Got it**. A **Getting started** strip stays under the header with five shortcuts: see what is running today, browse the sample jobs, check the schedule, invite a teammate, and read the full guide. Close it with the **x** when you no longer need it.

Getting started

- See what is running today**
Job Activity shows everything waiting, running, completed, or failed today.
- Browse the sample Jobs**
A demo Job tree is preloaded so you have real examples before building your own.
- Check the schedule**
See what is due to run and when, across every Calendar.
- Invite a teammate**
Create an Interactive User for anyone else who needs to sign in.
- Read the full guide**
Browse every topic at your own pace, any time.

Production Date: 10/08/2026 Thursday

Job No.	Name	Run ID	Instance	Rerun Count	Events Triggered	Status	Agent	Calendar
014500...	Health Check - API Endpoint	1	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
014500...	Health Check - API Endpoint	192	2	0	0	Completed Normally...	Master (this ser...	Every Day (D...
014500...	Health Check - Database Connection	2	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
01450045	Disk Space Monitor	3	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
014500...	Ping External Partner Service	4	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
01450047	Check License Expiration	5	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
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01450020	File Processing	25	1			Completed Normally...	Master (this ser...	Every Day (D...
01450028	System Maintenance	33	1			Completed Abnormally	Master (this ser...	Every Day (D...
01450036	Customer Onboarding Workflow	41	1			Completed Normally...	Master (this ser...	Every Day (D...

Find your way around:

- **The rail on the far left** switches between **Operations** (what is happening now), **Definitions** (what to run and when), **Reports**, **Administration** (administrators) and **Help**. The panel beside it lists the screens in that area.
- **The top bar** shows how many jobs are waiting and active, the success rate of today's finished runs, who else is **Online** (select it to read or send messages), the colour-scheme picker, and your user menu.
- **Help > User Guide** is this product's reference, searchable by topic.

2. See what ran today

Open **Operations > Job Activity**. This is the screen most people live in. It lists every run for one production date: choose another day with the date box or the **previous** and **next** buttons.

WORKSPACE Operations

OPERATIONS / Job Activity

4 WAIT 0 ACTIVE 98% SUCCESS

Online Coastal admin ADMIN

Production Date 10/08/2026 Thursday

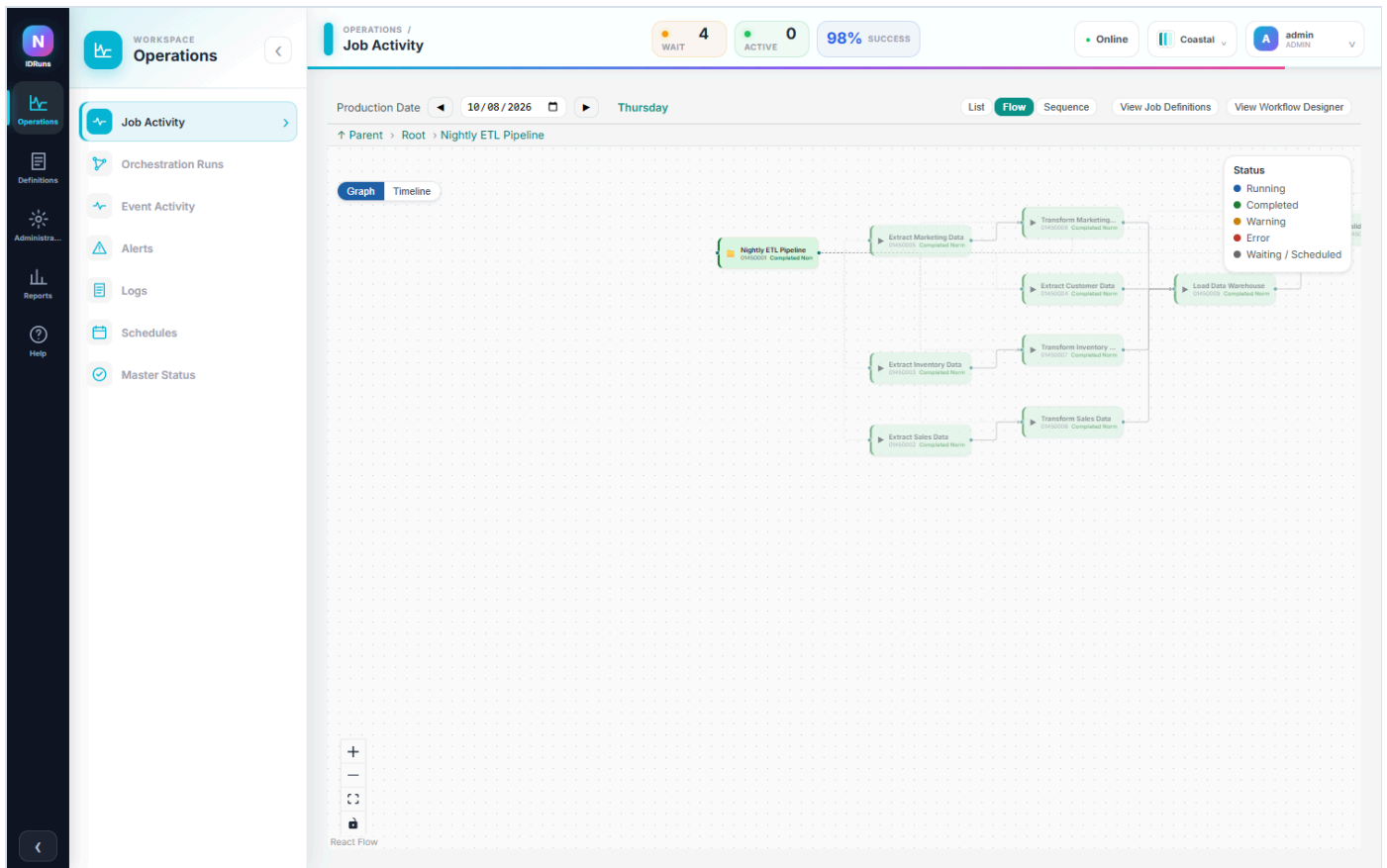
Job Activity 11 Records Search... Saved filters: No filters

Job No.	Name	Run ID	Instance	Rerun Count	Events Triggered	Status	Agent	Calendar
014500...	Health Check - API Endpoint	1	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
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014500...	Health Check - Database Connection	2	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
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014500...	Ping External Partner Service	4	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
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01450001	Nightly ETL Pipeline	6	1			Completed Normally...	Master (this ser...	Every Day (D...
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01450036	Customer Onboarding Workflow	41	1			Completed Normally...	Master (this ser...	Every Day (D...

The **Status** column tells you where each run stands. Green *Completed Normally* is a success; red *Completed Abnormally* is a failure. Folder rows are Job Groups: select the little arrow beside one to see the runs inside it.

Narrow the list. Type in **Search** to match any value, or use a column's filter. Save a combination you use often under **Saved filters**.

Follow a group. Double-click a Job Group to go into it and see just its runs. Switch from **List** to **Flow** to see the same runs as a diagram, with a line from each job to the jobs it waits on.



Act on runs. Tick the checkboxes (Shift-click to tick a range) for actions on several runs at once, or right-click one row for the actions that apply to it.

WORKSPACE

Operations

OPERATIONS / Job Activity

WAIT 4
ACTIVE 0
98% SUCCESS

[Online]
[Coastal]
[admin ADMIN]

Production Date: 10/08/2026 Thursday

List Flow Sequence

Job Activity
11 Records

Saved filters: No filters

Job No.	Name	Run ID	Instance	Rerun Count	Events Triggered	Status	Agent	Calendar	
☐	014500...	Health Check - API Endpoint	1	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	014500...	Health Check - API Endpoint	192	2	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	014500...	Health Check - Database Connection	2	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	01450045	Disk Space Monitor	3	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	014500...	Ping External Partner Service	4	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	01450047	Check License Expiration	5	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☒	01450001	Nightly ETL Pipeline	6	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	01450013	Nightly Reports	18	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	01450020	File Processing	25	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...
☐	01450028	System Maintenance	33	1	0	0	Abnormally...	Master (this ser...	Every Day (D...
☐	01450036	Customer Onboarding Workflow	41	1	0	0	Completed Normally...	Master (this ser...	Every Day (D...

Go Into Group
 Open in Workflow Designer
 Open in Job Definitions
 Insert in Schedule
 Replace In Schedule
 Expand Fully
 Show Dependencies
 Show Log Messages
 Show Details
 Override Time Dependencies (all members)
 Rerun (all members)
 Cancel (all members)
 Hold (all members)
 Release (all members)
 Override Dependencies (all members)
 Edit Time Window... (all members)
 Set Status... (all members)
 Remove from Schedule (all members)
 Terminate
 Edit Definition

Look inside a run. Double-click a run to open **Job Run Details**.

The screenshot shows the Databricks Job Activity interface. At the top, there's a 'Job Activity' header with a 'Production Date' of 10/08/2026. A summary bar shows 4 WAIT, 0 ACTIVE, and 98% SUCCESS. A modal window titled 'Job Run Details — Disk Space Monitor [01450045]' is open, displaying various tabs: Status, Output, History, Dependencies, Audit Log, Variables, and Runbook / Notes. The 'Status' tab is active, showing a 'Completed Normally' status. Below this, 'INSTANCE SETTINGS' are visible, including Agent (Master (this server)), Runtime User (inherit), Command (cmd.exe /c echo Checking disk space...), Working Dir, Timeout (seconds) (no limit), and a Comment field. The background shows a list of jobs with columns for Job No., Name, and a status icon.

- **Status** shows the result, the start and end times, the exit code and, for a run that is waiting, the **Reason** it is waiting.
- **Output** shows what the command printed; **History** shows earlier runs of the same job; **Dependencies** shows what it waited for; **Audit Log** shows who did what.
- **Rerun** starts it again, **Hold** stops it from starting, and **Set Status...** marks it as you decide (for example to release dependents of a failed job you fixed by hand).
- **Instance settings** such as the agent or command apply to this run only, unless you also choose to update the job definition when you save.

Try it. When a group shows *Completed Abnormally*, expand it, open the run that failed and read its **Output** tab - the command's own message usually says why.

3. Create a job

Jobs live under **Definitions > Jobs**.

DEFINITIONS /

Jobs

4

WAIT

0

ACTIVE

98%

SUCCESS

Online

Coastal

admin ADMIN

View in Workflow Designer

Jobs Only

Dependency Lines

Jobs

10 Records

Search...

☐	Job No.	Name	Type	Status	Owner	Agent	Calendar	Events	Enabled	Modified
☐	01450001	📁 ▶ Nightly ETL Pipeline	JOB_GROUP	● Enabled	Schedulers	Master (this server)	Every Day (De...	1	Yes	10/8/2026, 12:15:03 PM
☐	01450013	📁 ▶ Nightly Reports	JOB_GROUP	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450020	📁 ▶ File Processing	JOB_GROUP	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450028	📁 ▶ System Maintenance	JOB_GROUP	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450036	📁 ▶ Customer Onboarding Workflow	JOB_GROUP	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450043	Health Check - API Endpoint	JOB	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450044	Health Check - Database Connection	JOB	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450045	Disk Space Monitor	JOB	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450046	Ping External Partner Service	JOB	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
☐	01450047	Check License Expiration	JOB	● Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM

Select the + above the grid. The menu offers each kind of job - **OS Job** (runs a command), **FTP Job**, **Terminator Job**, **Approval Gate**, **Branch**, **Plugin Job** - plus **Job Group**, and two AI helpers you will meet in section 5.

DEFINITIONS /

Jobs

4

WAIT

0

ACTIVE

98%

SUCCESS

Online

Coastal

admin ADMIN

OS Job

Describe Your Job...

Plan with AI...

Job Group

FTP Job

Terminator Job

Approval Gate

Branch

Plugin Job

Jobs

10 Records

Search...

Name	Type	Status	Owner	Agent	Calendar	Events	Enabled	Modified
Nightly ETL Pipeline	JOB_GROUP	Enabled	Schedulers	Master (this server)	Every Day (De...	1	Yes	10/8/2026, 12:15:03 PM
Nightly Reports	JOB_GROUP	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
File Processing	JOB_GROUP	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
System Maintenance	JOB_GROUP	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
Customer Onboarding Workflow	JOB_GROUP	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
01450043 Health Check - API Endpoint	JOB	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
01450044 Health Check - Database Connection	JOB	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
01450045 Disk Space Monitor	JOB	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
01450046 Ping External Partner Service	JOB	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM
01450047 Check License Expiration	JOB	Enabled	Schedulers	Master (this server)	Every Day (De...	0	Yes	10/8/2026, 12:15:03 PM

Choose **OS Job**. The form has tabs; only the name is required to start.

Program tab - what to run. Give the job a unique **Job Name** and the **Command**. Add **Parameters** if the command takes arguments. The **Owner (Workgroup)** decides who can see and change the job; it is filled in with the workgroup you used last.

Job Definition

Job Name *

Owner (Workgroup) ☐ Inherit

Parent Group

☒ Program ☐ Schedule ☐ Run ☐ Dependencies ☐ Job Events ☐ Group Events ☐ Variables ☐ Options ☐ Run Book ☐ Notes ☐ History

Job Type

Command

Parameters

Right-click in Command, Parameters, Env File, or Working Dir to insert a variable.

ENVIRONMENT

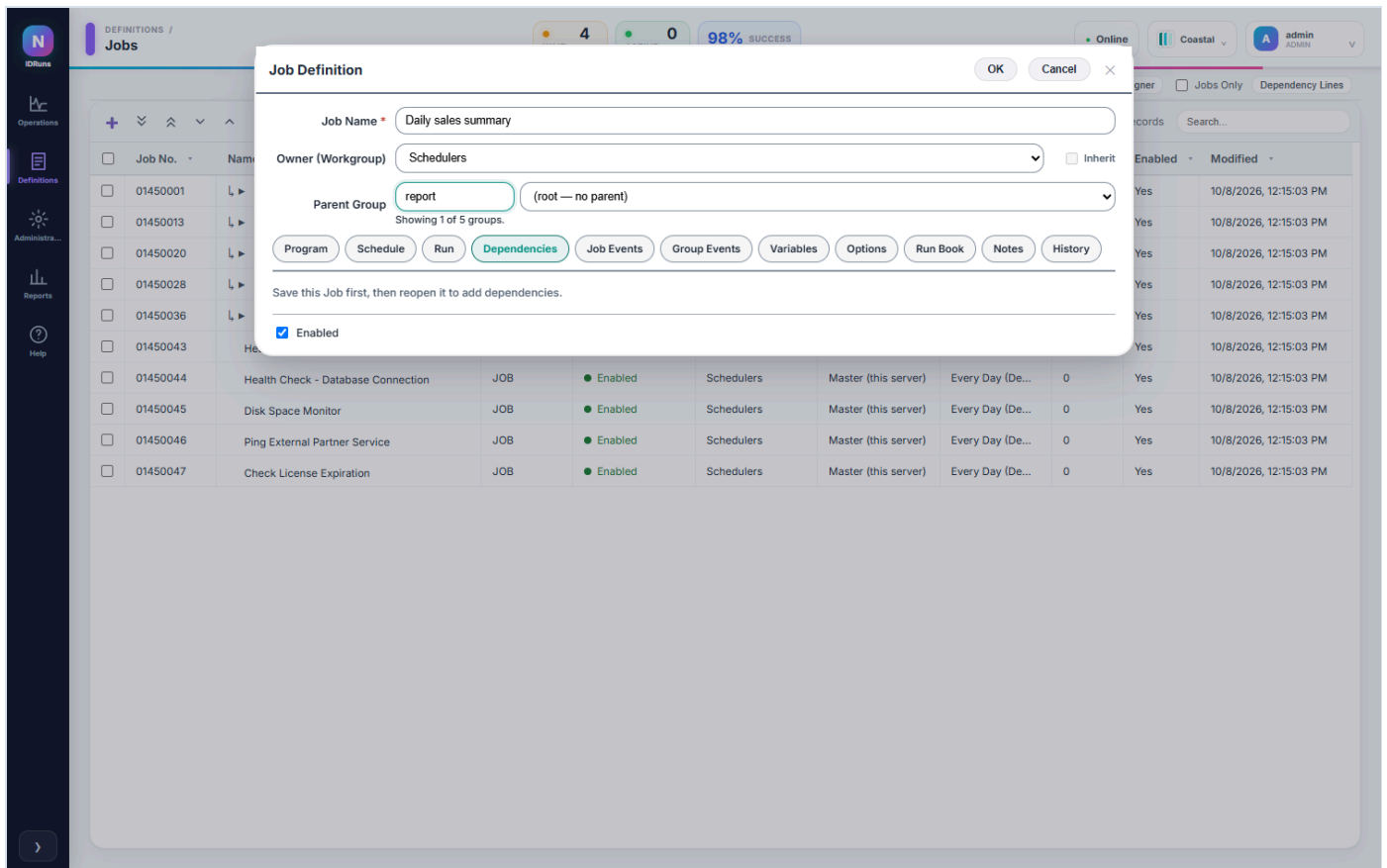
Env File

Working Dir

☐ Run command through PowerShell

☒ Enabled

Choose where it lives. Parent Group places the job inside a group, so it inherits that group's calendar, agent and time window. The list can be long: type in the **Filter groups** box beside it to narrow it by name or job number. Every word you type must match, and the group you already chose always stays in the list.



Schedule tab - when it runs. Pick a **Calendar** for the eligible days and set a **Time Window** and timezone if it must start at a certain time. **Offset**, **SLA** and an **Active Window** (dates the job is in effect) are optional. Tick **Inherit** beside a field to use the parent group's value instead.

Job Definition

Job Name *

Owner (Workgroup) ☐ Inherit

Parent Group (root — no parent)

Calendar ☐ Inherit

Offset ☐ Inherit

SLA

Finish within minutes of starting, and/or by

Raises a warning alert when 80% of the window has elapsed and a critical alert if missed. The time of day is in the timezone of the agent that runs the job. Blank inherits from the parent group.

ACTIVE WINDOW

From To

Optional - blank means no limit. Independent of the Calendar above: bounds when this Job auto-schedules, without touching the Calendar itself (which may be shared by other Jobs/Groups). Doesn't apply to a manual "Insert in Schedule".

TIME WINDOW

☐ Inherit time window from parent Job Group

Timezone

From To

Run tab - how it runs. Choose the **Agent** (or inherit it), the runtime user the command runs as, a working directory, a timeout, what counts as success (by default, exit code 0), and **Priority** and any **Resource Pool** the job needs.

Job Definition

Job Name *

Owner (Workgroup) ☐ Inherit

Parent Group ☐ Inherit

Agent ☒ Agent ☐ Agent List
 ☐ Inherit

The agent (or Agent List - see Administration > Agent Lists) this job's runs are dispatched to (see Administration > Connections).

Runtime User ☐ Inherit

OS user the agent runs the command as - own value if set, else inherited from the nearest ancestor Job Group (see Administration > Runtime Users). Follows Agent's Inherit checkbox - while Agent is inherited, Runtime User is too.

PRIORITY & RESOURCES

Priority

Higher priority jobs are admitted first when several are waiting on the same Resource Pool or master capacity. Default 0.

No resource pools exist yet - an admin creates them under Administration > Resource Pools.

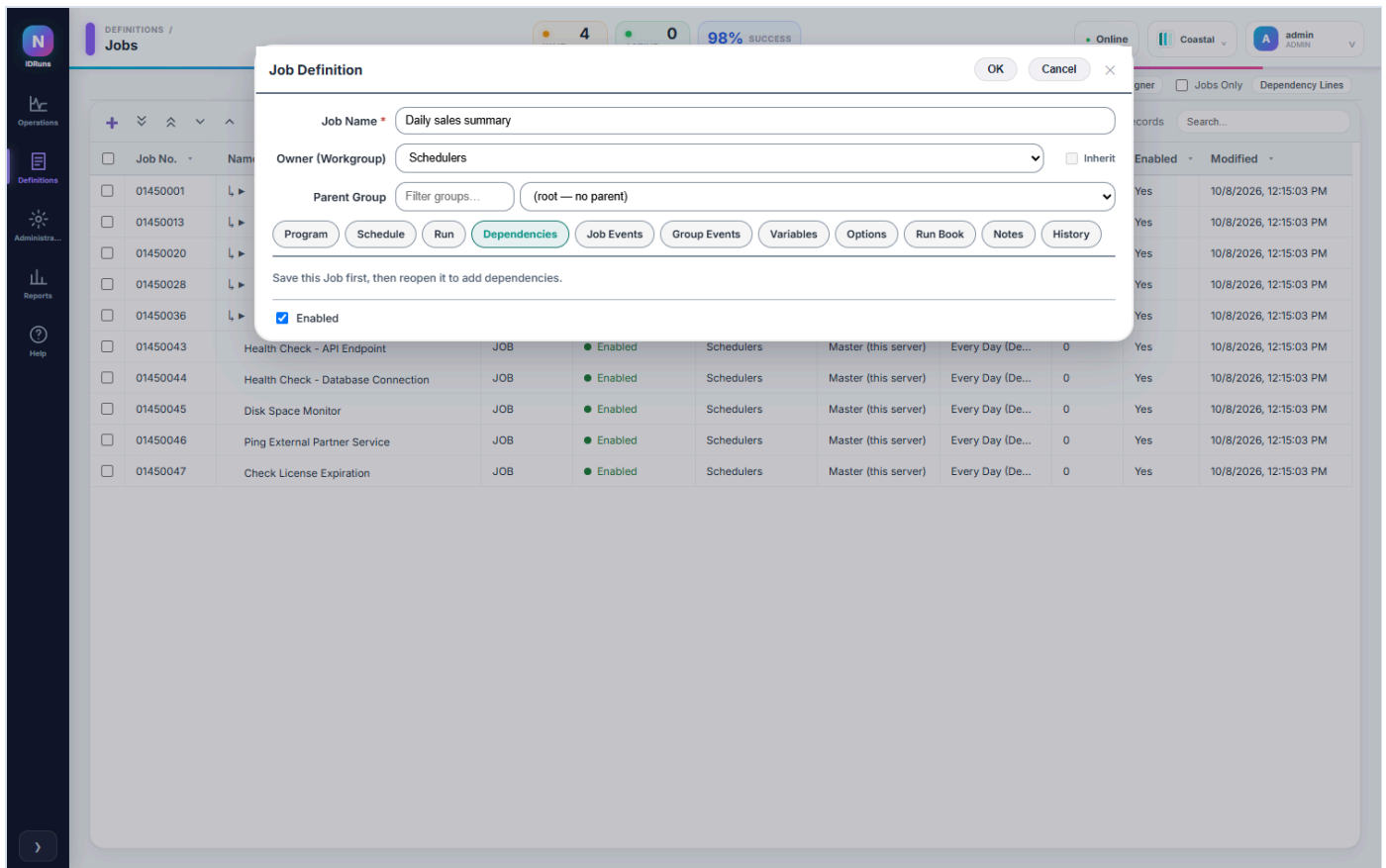
MAXIMUM RUNTIME

Maximum runtime seconds

Blank or 0 = no limit: the job may run as long as it needs, and nothing stops it if it hangs. When a limit is exceeded, a "Job exceeded max runtime" event fires and any actions checked below run.

☐ Email owner

Dependencies tab - what it waits for. Add prerequisites: another job finishing, a file appearing, or a variable having a value.



Select **OK** to save. Keep **Enabled** ticked when the job is ready to be scheduled.

Tip - groups first. To run several jobs on the same days and agent, create a **Job Group**, set the calendar, time window and agent on the group once, then create the jobs inside it and leave their own fields blank.

4. Schedule a job and run it now

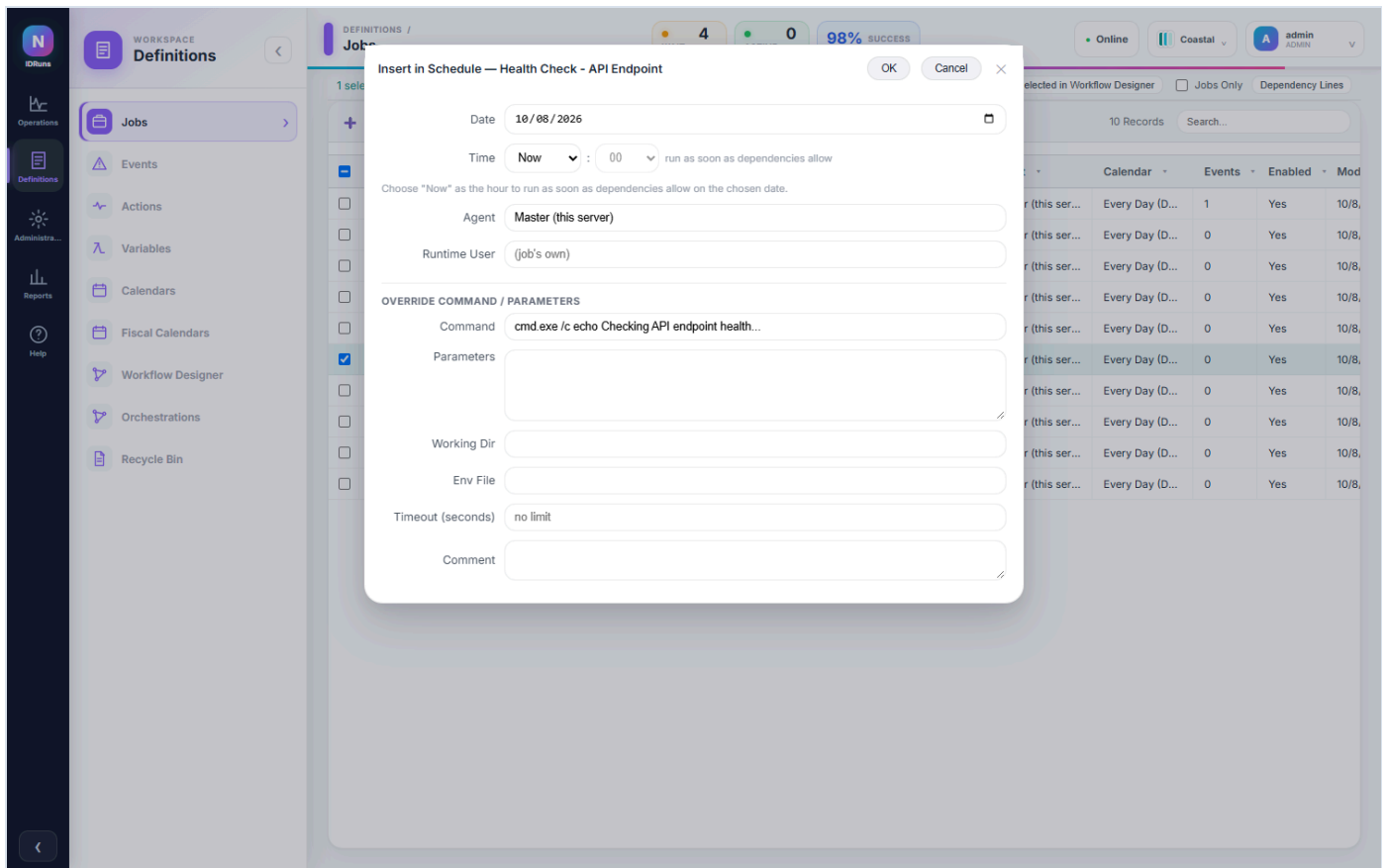
IDRuns compiles each day's runs from your definitions ahead of time. To run something **right now**, or on another day, insert it into the schedule.

Right-click the job in **Definitions > Jobs**. The menu has **Insert in Schedule**, **Show in Schedule**, **Replace in Schedule**, **Edit**, **Copy To...**, **Disable...** and **Delete**.

The screenshot shows the 'Definitions' workspace in Dify. The left sidebar contains navigation links for Operations, Definitions, Events, Actions, Variables, Calendars, Fiscal Calendars, Workflow Designer, Orchestrations, and Recycle Bin. The main panel displays a table of jobs under the 'Jobs' tab. The table has columns for Job No., Name, Type, Status, Owner, Agent, Calendar, Events, Enabled, and Modified. Job 01450043, 'Health Check - API Endpoint', is selected. A context menu is open over this job, showing options: New, Insert in Schedule, Show in Schedule, Replace in Schedule, Create Dependencies..., Edit, Copy To..., Disable..., Delete, and Move/Copy 1 selected item to parent group... The 'Insert in Schedule' option is highlighted. Above the table, there are status indicators: 4 WAIT, 0 ACTIVE, and 98% SUCCESS. The top right shows 'Online' status and the user 'admin'.

Job No.	Name	Type	Status	Owner	Agent	Calendar	Events	Enabled	Mod
01450001	Nightly ETL Pipeline	JOB_GRO...	Enabled	Schedulers	Master (this ser...	Every Day (D...	1	Yes	10/8,
01450013	Nightly Reports	JOB_GRO...	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450020	File Processing	JOB_GRO...	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450028	System Maintenance	JOB_GRO...	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450036	Customer Onboarding Workflow	JOB_GRO...	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450043	Health Check - API Endpoint	JOB	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450044	Health Check - Database Connection	JOB	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450045	Disk Space Monitor	JOB	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450046	Ping External Partner Service	JOB	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,
01450047	Check License Expiration	JOB	Enabled	Schedulers	Master (this ser...	Every Day (D...	0	Yes	10/8,

Choose **Insert in Schedule**. Pick the date, and the time (**Now** means as soon as dependencies allow). You can change the agent, runtime user, command and other settings for just this run; the definition is not changed.



Select **OK**, then open **Operations > Job Activity** and watch the new run go from waiting to running to completed. On a Job Group, **Insert in Schedule (all members)** runs everything inside it.

To take a run out of the schedule again, right-click the job and choose **Remove from Schedule** (it appears on the toolbar once a job is ticked).

Disabling or deleting a **Job Group** asks from which date to take it off the schedule. Pick a date: its runs from that day on are removed and earlier days stay scheduled. A deleted group waits in the **Recycle Bin** (shown as *Still scheduled*) until its future runs are gone; **Restore** asks from which date it goes back on the schedule.

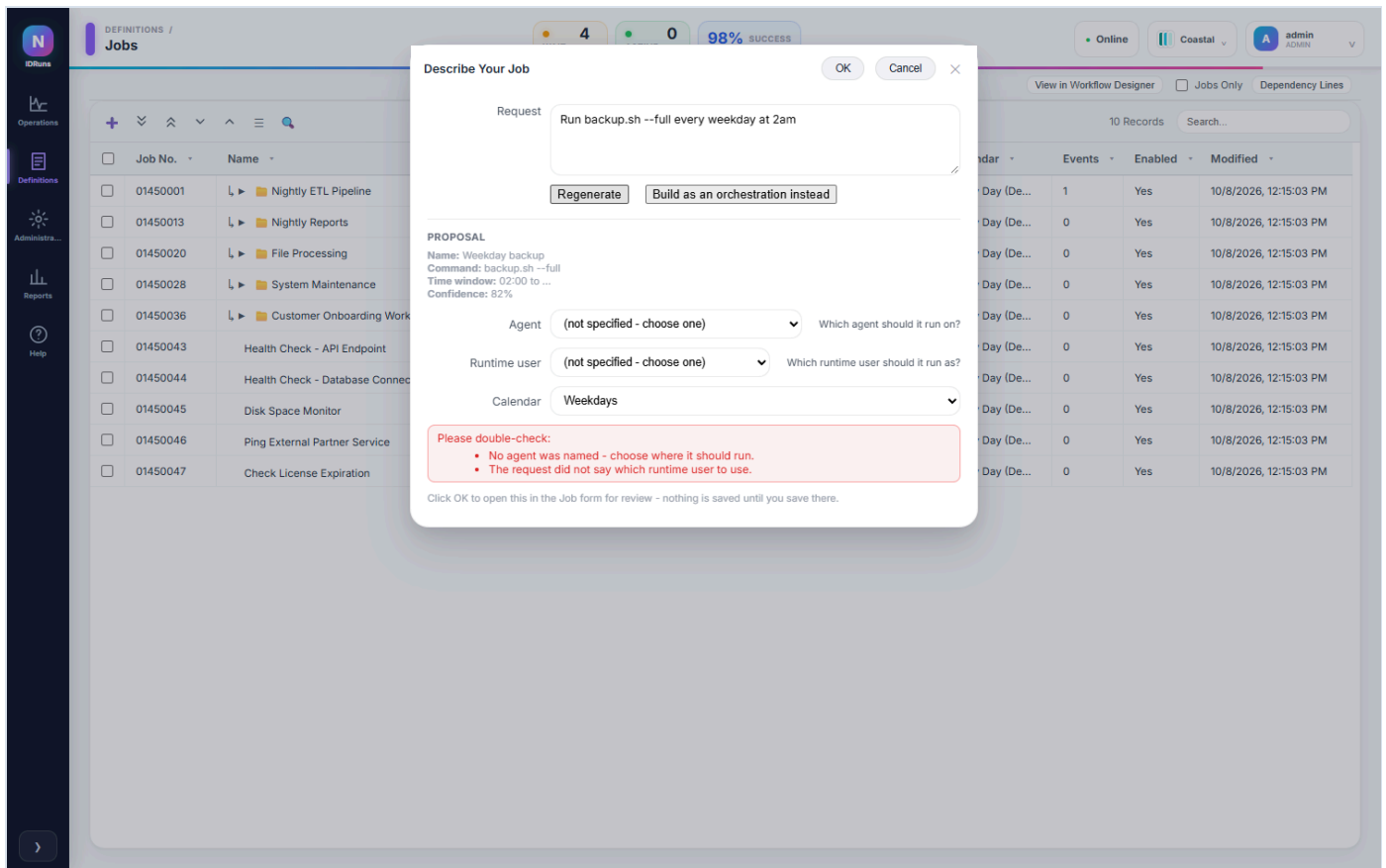
5. Let AI help you build jobs

Two helpers on the + menu turn plain English into definitions. They need an AI key, which an administrator sets once (see [section 11](#)). Nothing is created until you say so.

Describe Your Job - one job from one sentence

Choose **Describe Your Job...**, type what you want, and select **Generate**:

```
Run backup.sh --full every weekday at 2am
```



You see the proposed name, command, time window and a confidence score. The things the AI cannot know from your sentence are **dropdowns**:

- **Agent**, **Runtime user** and **Calendar** are filled in when your request makes them clear. When it does not, they say *(not specified - choose one)* with a question beside them, and you pick from the real agents, runtime users and calendars.
- Anything the AI had to guess is listed under *Please double-check*.

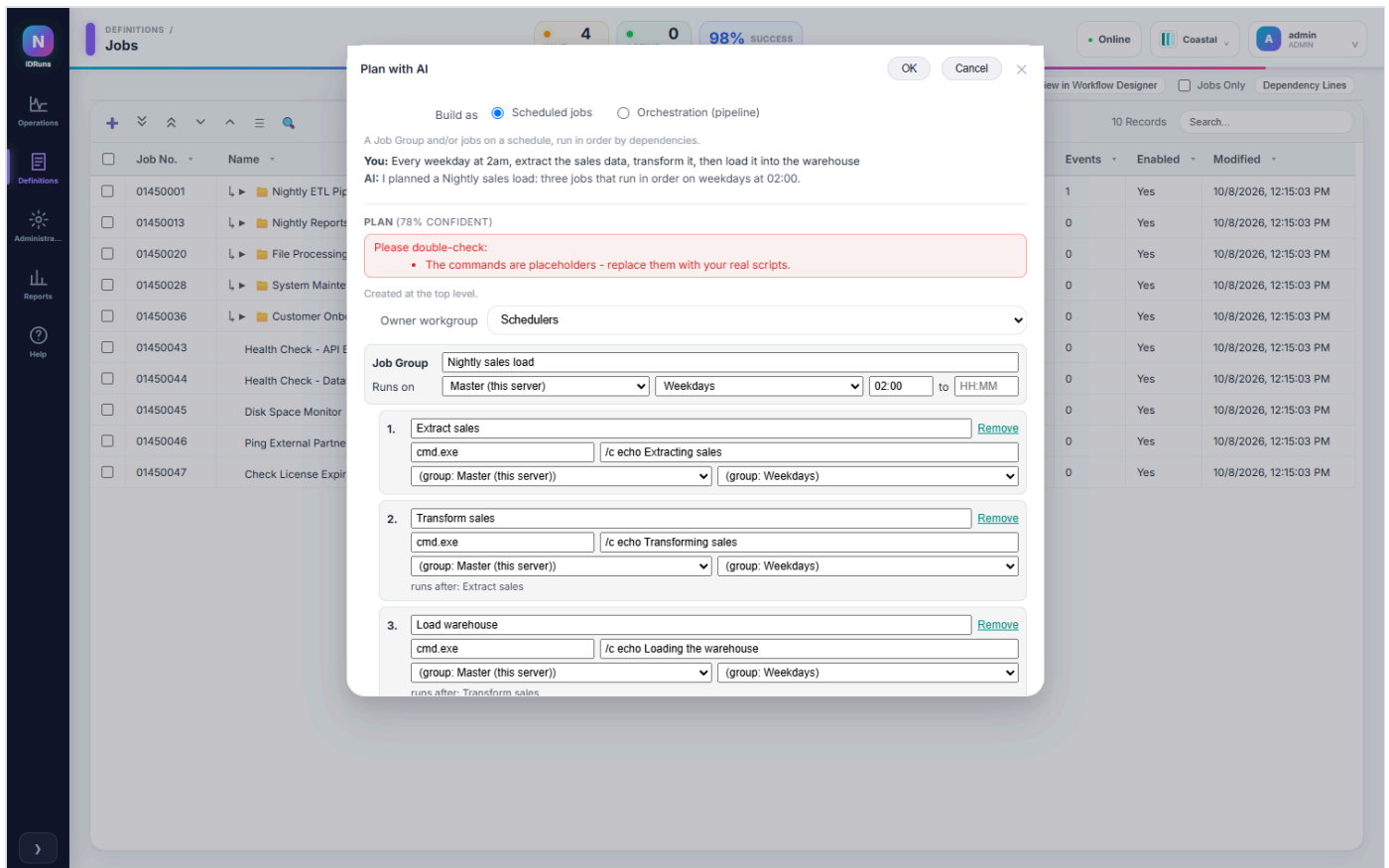
Select **OK** to open the result in the normal Job form for review - you save it there. If your request is really a pipeline (loops, conditions, approvals), select **Build as an orchestration instead** and your text carries over.

Plan with AI - a whole workflow, refined by conversation

Choose **Plan with AI...** and describe what you want to accomplish:

Every weekday at 2am, extract the sales data, transform it, then load it into the warehouse

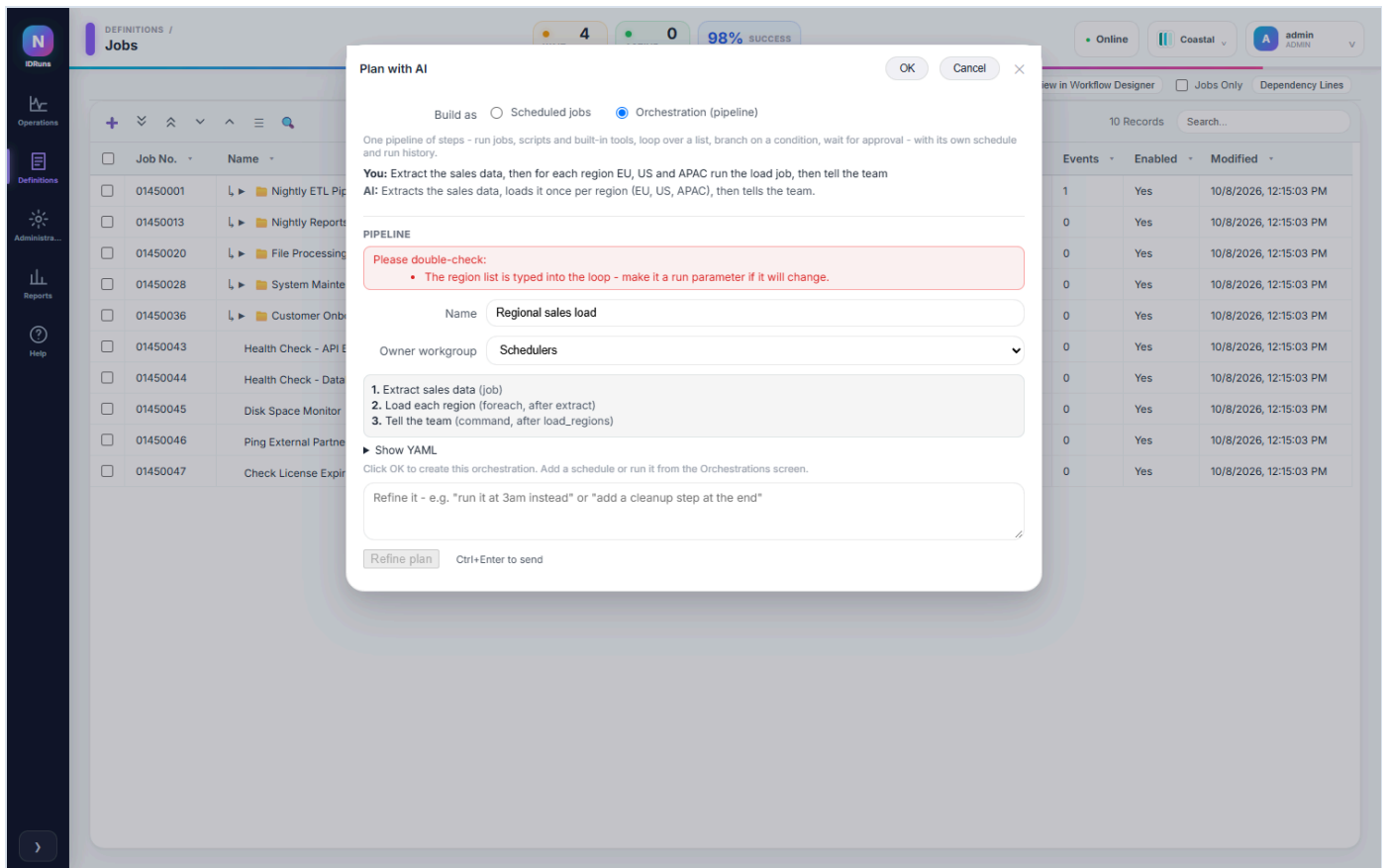
The AI proposes a **plan**: a Job Group holding the jobs, with their agent, calendar, time window and the order they run in.



- **Refine it by talking.** Type a follow-up in the box at the bottom - *"run it at 3am instead", "add a cleanup step at the end", "make the load run on the DB01 agent"* - and select **Refine plan**. You get the whole plan back, with your earlier edits kept.
- **Or edit it directly.** Change names, commands, parameters, agents and calendars in the plan, or **Remove** a job. Dependencies show as *runs after:*
- **Check the commands.** If you did not say what to run, the AI uses placeholders and tells you under *Please double-check*.
- **Choose an owner** workgroup when the plan lands at the top level.

Select **OK** to create the group, the jobs and their dependencies. If something fails part-way, the dialog lists what was created and offers **Undo**, which moves it to the recycle bin so you can fix the plan and try again.

Build as: Orchestration (pipeline). Switch **Build as** to get one orchestration instead of jobs. This is the better fit when the work needs a loop over a list, a decision, a wait for approval or run-time parameters - when your request needs one of these, the plan suggests the switch. You see the steps in order, and can open **Show YAML**; **OK** creates the orchestration.



6. Create a calendar

A calendar says which days a job is eligible to run. Open **Definitions > Calendars**.

N

Idioms

Operations

Definitions

Administration

Reports

Help

DEFINITIONS /

Calendars

4

WAIT

0

ACTIVE

98% SUCCESS

Online

Coastal

admin

+

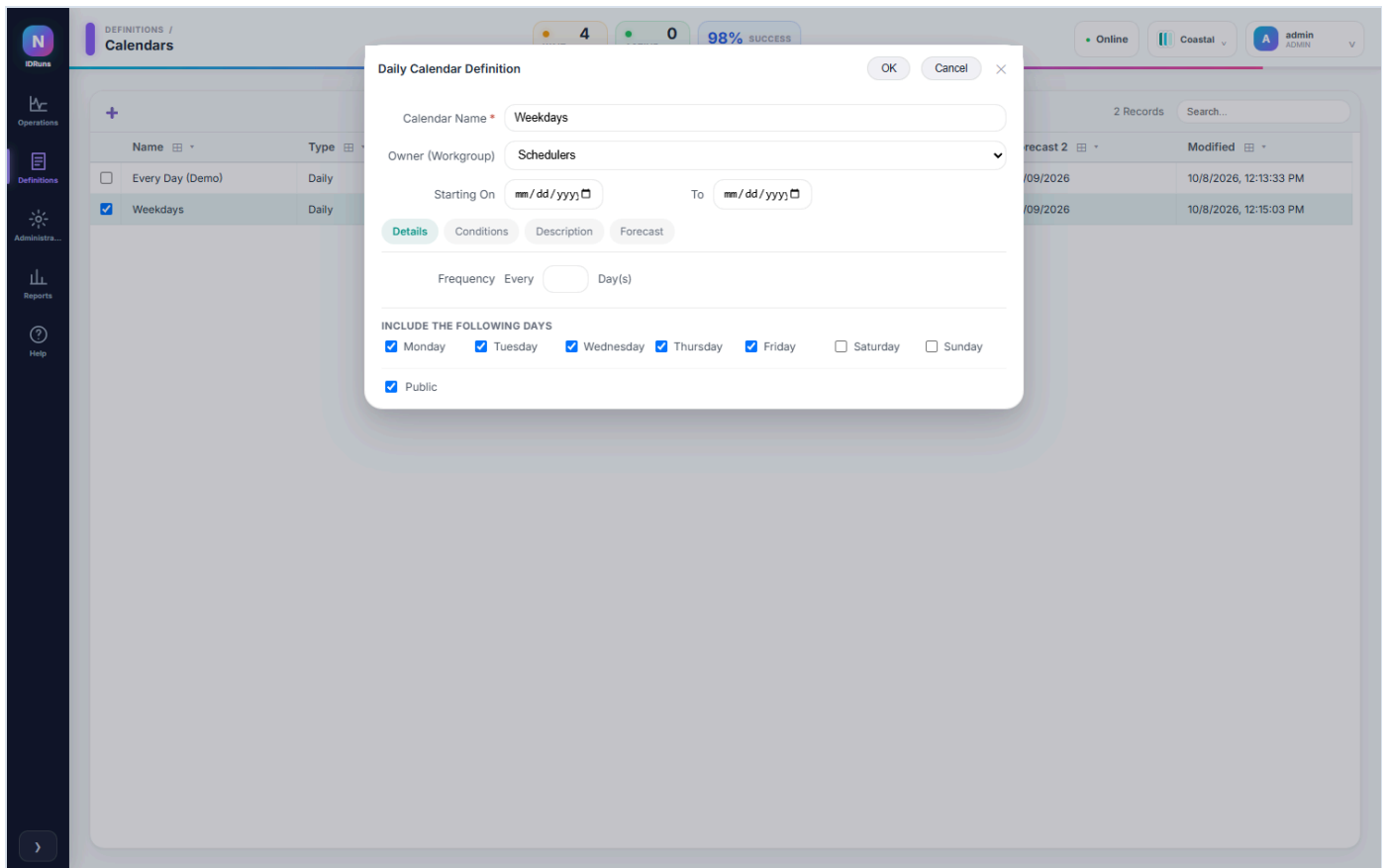
Calendars

2 Records

Search...

	Name	Type	Owner	Public	Forecast 1	Forecast 2	Modified
☐	Every Day (Demo)	Daily	(none)	Yes	10/08/2026	10/09/2026	10/8/2026, 12:13:33 PM
☐	Weekdays	Daily	Schedulers	Yes	10/08/2026	10/09/2026	10/8/2026, 12:15:03 PM

Select + to add one, or double-click an existing calendar. Give it a **Name**, choose the **Owner (Workgroup)**, and set the rule. A daily calendar has the days of the week to **include**; other types cover month ends, specific dates and fiscal periods. **Forecast** shows the next dates the calendar matches, so you can check it before using it. Leave **Public** ticked so other workgroups' jobs can use it.



Then choose the calendar on a job or group's **Schedule** tab (section 3), or on an orchestration schedule (section 9).

7. React to events

An **event** starts follow-up work when something happens - a job fails, a file arrives, a variable changes, the scheduler itself changes state. An event runs **Actions** (send an email, raise an alert, set a variable, add a job to the schedule), and an action is created once and reused.

Open **Definitions > Events**. The tabs are **Job Events**, **File Events**, **Variable Events** and **System Events**.

N

Idioms

Operations

Definitions

Administration

Reports

Help

DEFINITIONS / Events

WAIT4

ACTIVE0

98% SUCCESS

Online

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adminADMIN

Job Events

File Events

Variable Events

System Events

Job Trigger Types

System Event Triggers

Trigger counts: last 60 minutes · Today since midnight (America/New_York) · Refreshes every 30 seconds. Counts reflect retained firing history.

+

Job Events

3 Records

Search...

	Name	Last hour	Today	Owner	Enabled	Public	Trigger	Applied to	Modified
☐	Demo - ETL Failed Alert	0	0	Schedulers	Yes	Yes	Job completed abnormally	Individual jobs	10/8/2026, 12:13:33 PM
☐	Demo - Maintenance Success Log	0	0	Schedulers	Yes	Yes	Job completed normally	Individual jobs	10/8/2026, 12:13:33 PM
☐	Demo - Reprocess On Failure	0	0	Schedulers	Yes	Yes	Job completed abnormally	Individual jobs	10/8/2026, 12:13:33 PM

Open **Definitions > Actions** to create the reusable actions - for example an email to the on-call team.

DEFINITIONS / Actions

4 WAIT 0 ACTIVE 98% SUCCESS

Online Coastal admin ADMIN

All Email SMS Job Alert Log Variable

Actions 5 Records Search...

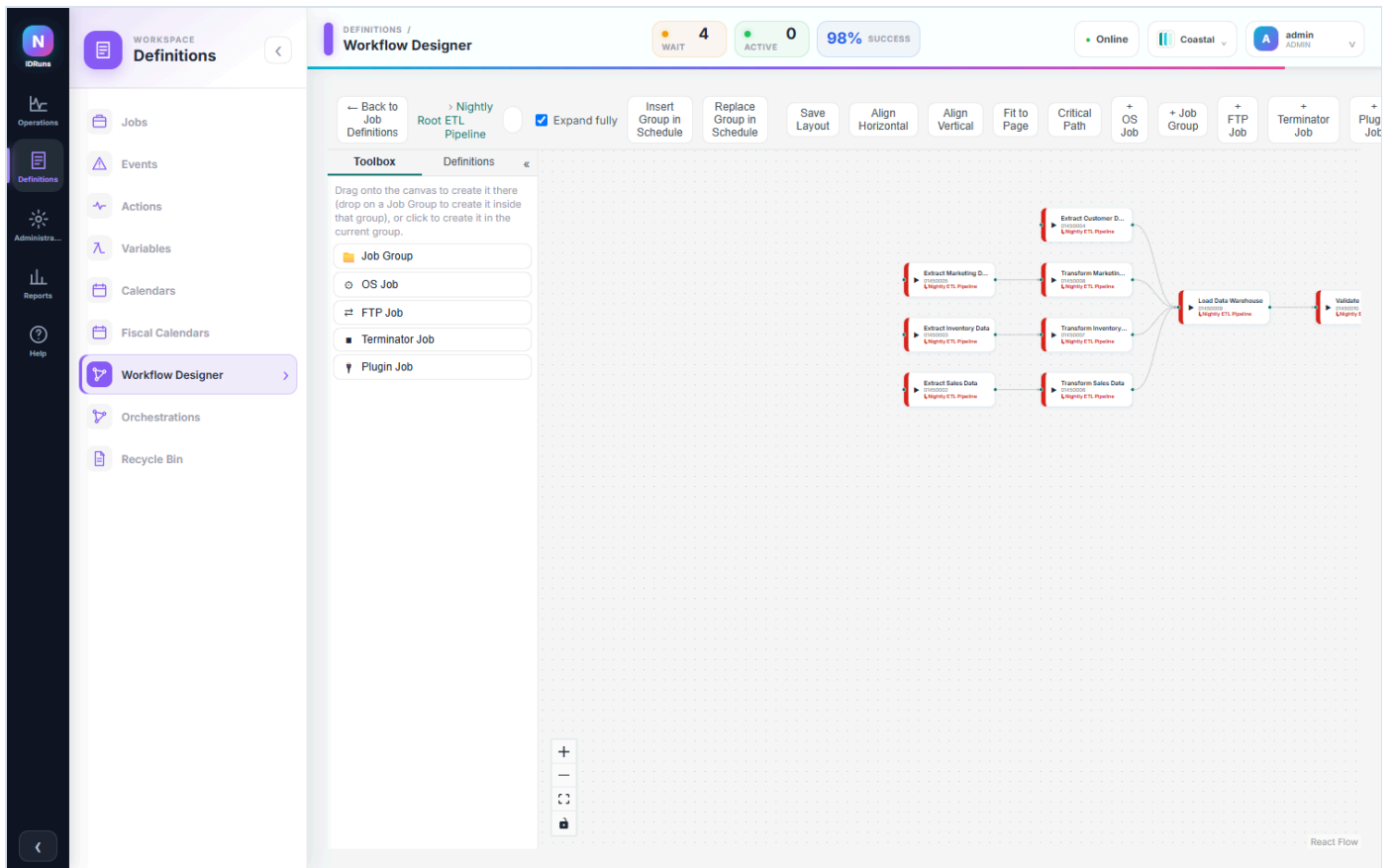
Name	Type	Owner	Public	Summary
☐ Demo - Email On Failure	EMAIL	Schedulers	Yes	To: oncall@example.com — Job failed: <JOB_NAME>
☐ Demo - Increment Failure Counter	VARIABLE	Schedulers	Yes	DEMO_FAILURE_COUNT ADD 1
☐ Demo - Insert Cleanup Job	JOB	Schedulers	Yes	Job: 01450026
☐ Demo - Log Maintenance Complete	LOG	Schedulers	Yes	Nightly maintenance finished successfully.
☐ Demo - Raise Critical Alert	ALERT	Schedulers	Yes	[Critical] ETL pipeline failed - immediate attention required.

A typical set-up:

1. Create an **Action** that emails the on-call team.
2. Create a **Job Event** for *job failed*, add that action, and attach the event to the job or group on its **Job Events** tab.
3. Watch it fire under **Operations > Event Activity**.

8. See how jobs depend on each other

Definitions > Workflow Designer draws a group's jobs and the lines between the jobs that wait on each other. Use **Jump to group...** to choose a group, or open it from the Jobs grid.



- **Align Horizontal, Align Vertical** and **Fit to Page** tidy the view; **Save Layout** keeps your arrangement.
- **Critical Path** outlines the longest chain of dependencies in red.
- Drag a job type from the **Toolbox** onto the canvas to create it there. Open a job to edit it. Drag from one job's right-hand dot to another to make the second wait for the first.

9. Build a pipeline with an orchestration

When the work is more than a calendar and a few dependencies - run these in order, repeat for each region, wait for a person to approve, tell the team if anything fails - use an **orchestration**. An administrator turns the feature on under *Administration > System Settings*.

Open **Definitions > Orchestrations**, choose an orchestration, and you see its steps as a graph (or as YAML with **Show YAML**; both are the same definition). Every save is a new version, and each run records which version it used.

The screenshot displays the Databricks Orchestration interface. At the top, a status bar shows 4 WAIT, 0 ACTIVE, and 98% SUCCESS. The left sidebar contains navigation icons for Operations, Definitions, Administration, Reports, and Help. The main area is divided into a 'Toolbox' on the left and a workflow graph on the right. The 'Toolbox' lists various step types: FLOW (9), Job / Job Group, Script, Data pipe, Condition, For each (loop), Wait, Approval, Run another orchestration, and On-failure handler. Below these are 'COMMANDS' categorized by FILE (12), NETWORK (6), ARTIFACTS (3), SOURCE CONTROL (1), SYSTEM (1), SERVICES & PROCESSES (6), and LISTS (7). The workflow graph on the right shows a sequence of steps: 'Extract sales data' (Job 01430002 - Extract Sale...), 'Transform sales data' (Job 01430008 - Transform S...), 'Load data warehouse' (Job 01430008 - Load Data W...), 'Sign off before publishing' (Approval), and 'Publish reports' (Job 01430009 - Publish Repo...). A red box labeled 'Tell the on-call team' (On failure - PowerOut on M...) is connected to the 'Load data warehouse' step. The top of the graph area includes tabs for 'Validate', 'Save', 'Discard', 'Run...', 'Runs', 'Schedules...', and 'Versions...'. A 'Parameters...' tab is also visible.

The **Toolbox** on the left holds the step types. Drag one onto the graph:

- **Job / Job Group** runs something you already defined.
- **Script** runs an inline command on an agent; the command library next to it has about thirty ready-made steps (copy files, check a port, call a URL, restart a service...).
- **Condition**, **For each (loop)**, **Wait** and **Approval** control the flow.
- **On-failure handler** runs only when the pipeline fails.

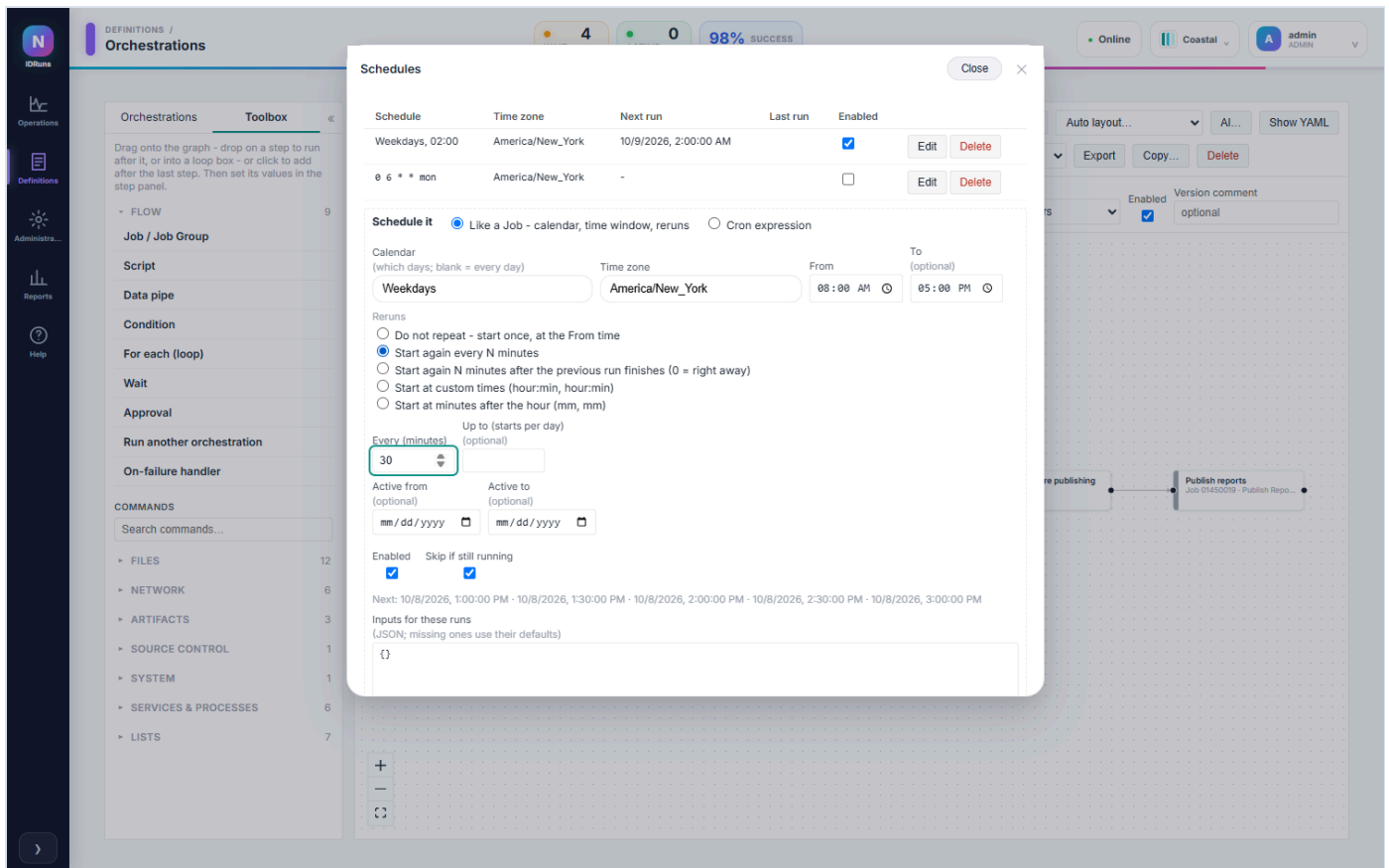
Drag from a step's right-hand dot to another step to say "run after". **Parameters...** adds run-time inputs (such as *region*) that steps read.

Or skip the dragging: **AI...** drafts an orchestration from a description, and so does **Plan with AI** with *Build as: Orchestration* (section 5).

Schedule an orchestration

Select **Schedules...**, then **Add schedule**. Choose **Schedule it** one of two ways.

Like a Job (the same ideas as the job Schedule tab):



- **Calendar** says which days (blank means every day). Choose the **time zone**, a **From** time and an optional **To** time.
- **Reruns** says what happens after the first start of the day:
 - *Do not repeat* - start once, at the From time.
 - *Start again every N minutes* - from From, until To.
 - *Start again N minutes after the previous run finishes* - 0 means right away; the next start waits for the run to end, however it ended, and stops at the To time.
 - *Start at custom times* - for example 08:00, 12:30, 17:00.
 - *Start at minutes after the hour* - for example 0, 30.
- **Up to** caps the starts per day. **Active from / to** limit the dates.
- **Skip if still running** avoids overlap. **Inputs** gives the parameters for these runs.
- The line under the form shows the **next five start times** as you edit, so you can see the schedule is what you meant.

Cron expression is there too, for people who prefer it:

DEFINITIONS / Orchestration

4 0 98% SUCCESS

Online Coastal admin ADMIN

Auto layout... AI... Show YAML

Export Copy... Delete

Enabled Version comment optional

re publishing Publish reports Job 01400010 - Publish Repo...

Orchestration

Toolbox

Drag onto the graph - drop on a step to run after it, or into a loop box - or click to add after the last step. Then set its values in the step panel.

FLOW

Job / Job Group

Script

Data pipe

Condition

For each (loop)

Wait

Approval

Run another orchestration

On-failure handler

COMMANDS

Search commands...

FILES 12

NETWORK 6

ARTIFACTS 3

SOURCE CONTROL 1

SYSTEM 1

SERVICES & PROCESSES 6

LISTS 7

Schedules

Close

Schedule	Time zone	Next run	Last run	Enabled	
Weekdays, 02:00	America/New_York	10/9/2026, 2:00:00 AM		☒	Edit Delete
0 6 * * mon	America/New_York	-		☐	Edit Delete

Schedule it ☐ Like a Job - calendar, time window, reruns ☒ Cron expression

Cron (minute hour day month weekday) Preset Time zone

0 6 * * * Choose... America/New_York

Enabled ☒ Skip if still running ☒

Next: 10/9/2026, 6:00:00 AM - 10/10/2026, 6:00:00 AM - 10/11/2026, 6:00:00 AM - 10/12/2026, 6:00:00 AM - 10/13/2026, 6:00:00 AM

Inputs for these runs (JSON; missing ones use their defaults)

{}

Save schedule Cancel

Tell the on-call team On failure - PowerShell get M...

Both kinds appear together in the list, each with its next run.

The screenshot displays the Azure Data Factory 'Orchestrations' page. A 'Schedules' modal is open, showing the following table:

Schedule	Time zone	Next run	Last run	Enabled	Actions
Weekdays, 02:00	America/New_York	10/9/2026, 2:00:00 AM		☒	Edit Delete
0 6 * * mon	America/New_York	-		☐	Edit Delete

Below the table is an 'Add schedule' button. The background shows a workflow graph with the following steps:

- Extract sales data (Job 01430002 - Extract Sale...)
- Transform sales data (Job 01430008 - Transform S...)
- Load data warehouse (Job 01430008 - Load Data W...)
- Sign off before publishing (Approval)
- Publish reports (Job 01430008 - Publish Repo...)

A 'Tell the on-call team' step is also visible, triggered on failure.

Watch a run

Operations > Orchestration Runs shows each run as a live graph with a table of steps. A step that is waiting for a person shows *AWAITING_APPROVAL*: open it and **Approve** or **Reject** (approvers can also decide from the link in the email they are sent). **Run again...**, **Cancel run** and per-step **Retry** are on the same screen.

OPERATIONS /

Orchestration Runs

WAIT

4

ACTIVE

0

98% SUCCESS

Online

Coastal

admin ADMIN

Runs

All orchestrations

Any status

10/08/2026

Thursday

Nightly sales pipeline #1

RUNNING

12:15:50 PM - admin - 24m 7s

Run #1 · Nightly sales pipeline

RUNNING

v2 · MANUAL by admin · started 10/8/2026, 12:15:50 PM · 24m 7s

Definition

Run again...

Cancel run

Inputs: {"region": "EU"}

+

-

↺

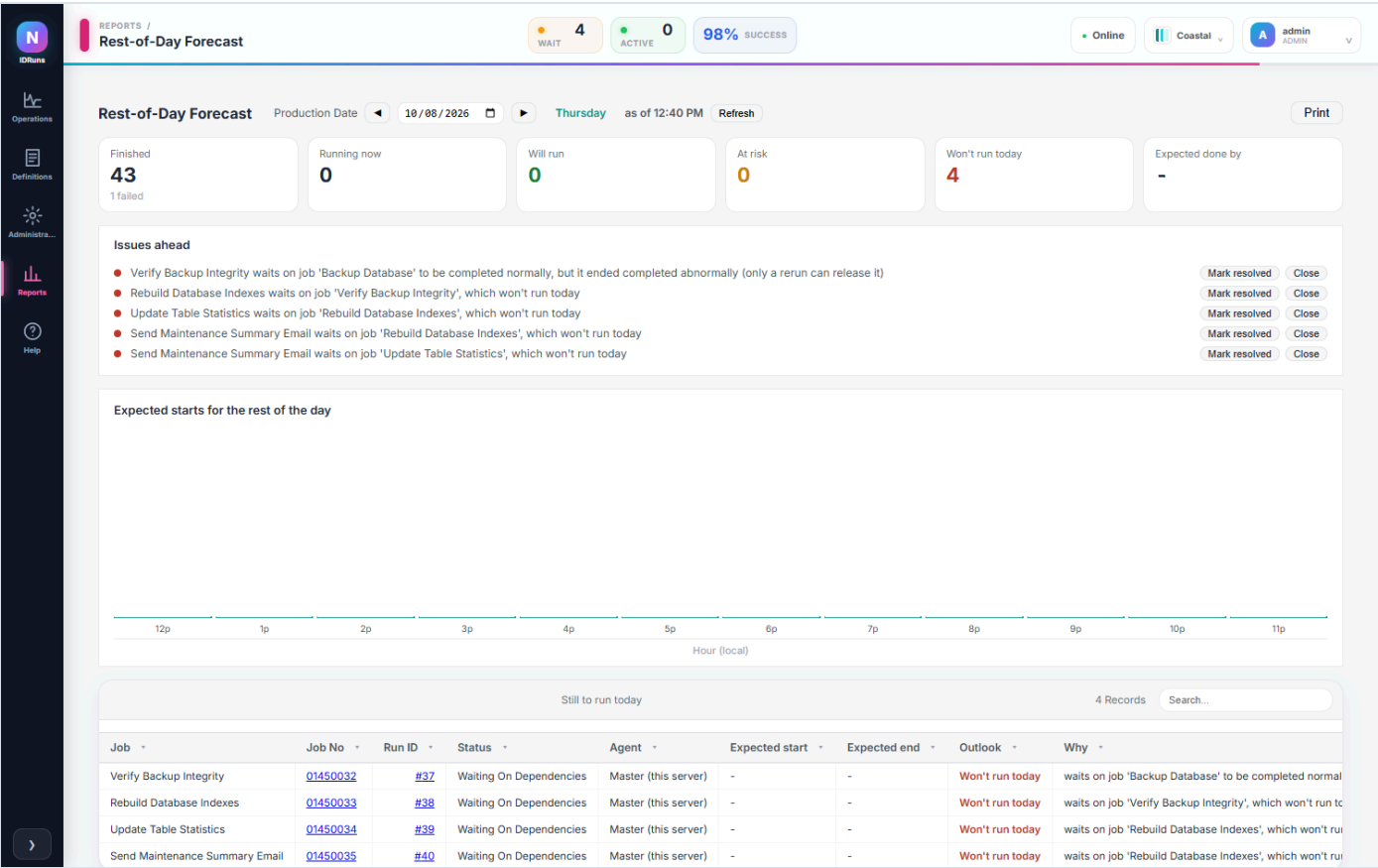
↻

Step	Type	Status	Attempt	Started	Duration	Job runs	Detail
Extract sales data	Job 01450002	SUCCEEDED	1	10/8/2026, 12:15:50 PM	4s	#48	
Transform sales data	Job 01450006	SUCCEEDED	1	10/8/2026, 12:15:54 PM	6s	#49	
Load data warehouse	Job 01450009	SUCCEEDED	1	10/8/2026, 12:16:00 PM	4s	#50	
Sign off before publishing	Approval	AWAITING_APPROVAL	1	10/8/2026, 12:16:04 PM	23m 53s		
Publish reports	Job 01450019	waiting					
⚠ Tell the on-call team	Command	waiting					

10. Find out why something did not run

Work through this list in order; it finds most problems.

- Job Activity** - check you are on the right **production date**, and clear **Search** and filters.
- Open the run** (double-click). Read the **Status** tab: *Completed Abnormally* shows the exit code; a waiting run shows the **Reason** (waiting for a dependency, a time window, resources, a group, a scheduled start...). Read **Output** for what the command printed.
- Rest-of-Day Forecast** (Reports) lists today's *Issues ahead*: jobs that will not run and why - waiting on a failed job, an agent that is offline, a time window that closes first.



4. **Logs** (Operations) - search by job, run or message.

OPERATIONS / Logs 4 WAIT 0 ACTIVE 98% SUCCESS Online Coastal admin ADMIN											
	Date 10/08/2026 Exclude job status change messages Logs 438 Records Search...										
	Log ID	Time	Type	Message	Source	Job Name	Job No.	Run ID	Instance	User Name	Agent
	438	12:39:14 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	193	3		Master (this ser...
	437	12:39:14 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	193	3		Master (this ser...
	436	12:39:14 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	193	3		Master (this ser...
	435	12:39:14 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	193	3		Master (this ser...
	434	12:36:19 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	192	2		Master (this ser...
	433	12:36:19 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	192	2		Master (this ser...
	432	12:36:19 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	192	2		Master (this ser...
	431	12:36:14 PM	Audit	Job Run [01450...	Scheduler	Health Check - ...	01450043	192	2		Master (this ser...
	430	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Send Training M...	01450042	191	1		Master (this ser...
	429	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Schedule Onboa...	01450041	190	1		Master (this ser...
	428	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Send Welcome ...	01450040	189	1		Master (this ser...
	427	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Provision Billing ...	01450039	188	1		Master (this ser...
	426	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Provision Custo...	01450038	187	1		Master (this ser...
	425	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Create Custome...	01450037	186	1		Master (this ser...
	424	12:18:33 PM	Audit	Job Group [014...	Scheduler	Customer Onbo...	01450036				
	423	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Send Training M...	01450042	184	1		Master (this ser...
	422	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Schedule Onboa...	01450041	183	1		Master (this ser...
	421	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Send Welcome ...	01450040	182	1		Master (this ser...
	420	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Provision Billing ...	01450039	181	1		Master (this ser...
	419	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Provision Custo...	01450038	180	1		Master (this ser...
	418	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Create Custome...	01450037	179	1		Master (this ser...
	417	12:18:33 PM	Audit	Job Group [014...	Scheduler	Customer Onbo...	01450036				
	416	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Send Training M...	01450042	177	1		Master (this ser...
	415	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Schedule Onboa...	01450041	176	1		Master (this ser...
	414	12:18:33 PM	Audit	Job Run [01450...	Scheduler	Send Welcome ...	01450040	175	1		Master (this ser...

5. **Master Status** - the scheduler's state, what each agent is running, and recent scheduler activity.

OPERATIONS /

Master Status

4

WAIT

0

ACTIVE

98%

SUCCESS

Online

Coastal

admin

ADMIN

What's Blocking Throughput

RIGHT NOW

Verdict

4 run(s) held by dependencies/time windows, not by capacity

Running / master cap

0 / ∞

Waiting for an agent

0

Finished (last 5 min)

2

The master cap is the only limit this server enforces. Runs past it wait; raise it in Administration > Connections on the master row.

HELD RUNS (4)

Reason	Runs
Waiting on dependencies	4

AGENT LOAD

No agents with work.

An agent's worker slots are declared by the agent itself, not enforced here - a standing Queued figure means that agent, not this server, is the limit.

General Information

Description	Value
Production Date	2026-10-08
Total Jobs	47
Active Jobs	0
Scheduled Jobs	0
Jobs To Go	4
Jobs Cancelled	0
Jobs Carried Forward	0
Reruns	0
Low Poll	10/8/2026, 12:40:01 PM
Start Time	10/8/2026, 12:13:32 PM

Scheduler Engine

Description	Value
Instance	win11
Database	SQLite - C:/Users/drewe/AppData/Local/Temp/claude/d-projects-newwave/8336a040-52b2-476b-b89d-c36f91e560b8/scratchpad/tutorial.db
File Mover Relay	D:\projects\newwave\backend\file-mover-relay - 0.0 GiB of 50 GiB reserved, 287 GiB free on disk
High Availability	Disabled
Scheduling	Running
Dispatch Loop	Healthy - last success: 10/8/2026, 12:40:01 PM
Daily Maintenance Loop	Healthy - last success: 10/8/2026, 12:38:33 PM
HTTP Request Workers	1/40 busy
DB Connection	3 in use, 5 idle (pool 40 + overflow 80)

Recent Activity

Time	Activity
10/8/2026, 12:39:14 PM	Job Run [01450043] status change to COMPLETED_NORMALLY
10/8/2026, 12:39:14 PM	Job Run [01450043] status change to Active
10/8/2026, 12:39:14 PM	Job Run [01450043] status change to LAUNCHED
10/8/2026, 12:39:14 PM	Job Run [01450043] status change to READY (Run Now requested by user)
10/8/2026, 12:36:19 PM	Job Run [01450043] status change to COMPLETED_NORMALLY
10/8/2026, 12:36:19 PM	Job Run [01450043] status change to Active
10/8/2026, 12:36:19 PM	Job Run [01450043] status change to LAUNCHED
10/8/2026, 12:36:14 PM	Job Run [01450043] status change to READY (Run Now requested by user)
10/8/2026, 12:18:33 PM	Job Run [01450042] status change to SCHEDULED

6. **Schedules** (Operations) - totals per production date (scheduled, ad hoc, carried over, failed, succeeded). Double-click a date to open its Job Activity.

OPERATIONS / Schedules

4 WAIT

0 ACTIVE

98% SUCCESS

Online

Coastal

admin ADMIN

Operations

Definitions

Administration

Reports

Help

Double-click a date to open its Job Activity.

Schedules by Date

4 Records Search...

Date	Day	Period	Total Jobs	Scheduled	Ad Hoc	Carried Over	Failed	Succeeded
2026-10-11	Sunday	Future	42	42	0	0	0	0
2026-10-10	Saturday	Future	42	42	0	0	0	0
2026-10-09	Friday	Future	42	42	0	0	0	0
2026-10-08	Thursday	Today	47	42	5	0	1	42

- Alerts** - conditions that need a person, including SLA deadlines at risk or missed. Select an alert and choose **Respond** to acknowledge or close it.

Before you ask for help, note the job number, run ID, time and the exact message.

11. Administration for new administrators

Administrators only. The **Administration** area lists only the screens your role can use.

Agents and connections. **Administration > Connections > Agents** lists the computers that run jobs. **Master (this server)** is always there. Add an agent with **+**; its **Communication** tab shows recent work sent to it and the results. **Plugins** holds named connections to outside systems (SQL Server, REST APIs, SSH/SCP, any database through JDBC...).

N

Idioms

Operations

Definitions

Administration

Reports

Help

ADMINISTRATION /

Connections

4

WAIT

0

ACTIVE

98%

SUCCESS

Online

Coastal

admin

ADMIN

Agents

Plugins

+

≡

🔍

Connections

1 Records

Search...

☐	Name	Hostname	OS	Timezone	Capacity	Active	Status	Master	Stopped	Last Contact	File Mover
☐	Master (this server)	win11	Windows	America/New_York	0	0	● online	★ Master (built-in)		1s ago	

Runtime Users. A runtime user is the account a job runs as. Create one with a name, its login name and a description; passwords are stored per job type and never shown again. **Change password...** replaces one without opening the whole form.

N

Idioms

Operations

Definitions

Administration

Reports

Help

ADMINISTRATION / Runtime Users

WAIT 4

ACTIVE 0

98% SUCCESS

Online

Coastal

admin ADMIN

Runtime Users

1 Records

Search...

Change password...

	Name	Login Name	Description	Passwords	Modified
☐	svc_etl	CORP\svc_etl	Service account for the nightly ETL	—	10/8/2026, 12:15:03 PM

Workgroups. A workgroup owns definitions and decides who may change them. Attach the agents and runtime users its members may use.

N

Idioms

Operations

Definitions

Administration

Reports

Help

ADMINISTRATION / Workgroups

4 WAIT

0 ACTIVE

98% SUCCESS

Online

Coastal

admin ADMIN

+

Workgroups

1 Records

Search...

	Name	Users	Owner	Modified
☐	Schedulers	admin, sam		10/8/2026, 12:13:33 PM

Interactive Users. Create the accounts that sign in, choose each user's **role**, and the workgroups they belong to. Create your own named administrator first - the built-in starter login stops working once real users exist.

N

Idioms

Operations

Definitions

Administrators

Reports

Help

ADMINISTRATION /

Interactive Users

4

WAIT

0

ACTIVE

98%

SUCCESS

Online

Coastal

admin

ADMIN

+

Interactive Users

2 Records

Search...

	Username	Role	Description	Enabled	Password	Modified
☐	admin	ADMIN	Administrator	Yes	Set	10/8/2026, 12:40:13 PM
☐	sam	USER	Scheduler - data team	Yes	Set	10/8/2026, 12:15:11 PM

AI Monitor. Store the AI API key and choose the model. The model list is loaded from Anthropic for your key, so it shows what you can use; choose **Other** to type a model ID. **Test Connection** checks the key and model. The same key powers *Describe Your Job*, *Plan with AI* and the AI diagnosis added to failure alerts, and the AI Monitor reviews job health on a schedule, emailing the **Operators** listed there when a new Critical finding appears. It appears once an administrator turns on *Enable AI* in System Settings.

N

Others

Operations

Definitions

Administration

Reports

Help

ADMINISTRATION / AI Monitor

WAIT4

ACTIVE0

98% SUCCESS

OnlineCoastaladminADMIN

AI Monitor

SaveTest Connection

Periodically reviews application health and the job schedule for issues, raising an Alert (Operations > Alerts) when something needs attention. Also powers the "AI Review" action on individual job runs in Job Activity. Uses the Anthropic API - each check and each review is a billed API call.

Enabled☐

API Key

A key is already stored. Leave blank to keep it, or type a new one to replace it.

API Endpoint (optional)

Model

Larger models review more carefully; smaller ones are faster and cheaper. The same model also powers Plan with AI and Describe Your Job.

Overdue / Stuck / Offline (min)

306010

Check Interval (minutes)

60

OPERATORS

usernameemailAdd

ADVISORY FINDINGS

No findings.

STATUS

Last check: Never

System Settings. Retention for job activity and logs, how far ahead the schedule is compiled, carry-over of unfinished work, confirmation before discarding edits, the application layout everyone sees, and the switches for optional features (Version History, Orchestrations, AI, the Schedule Simulator, Job Iteration, Tidal import and export).

IDRuns

Operations

Definitions

Administration

Reports

Help

ADMINISTRATION /

System Settings

4

WAIT

0

ACTIVE

98%

SUCCESS

Online

Coastal

admin

ADMIN

System Settings

Save

EXAMPLE DATA

Reload Demo Jobs

Creates a 42-job example set (5 Job Groups: a nightly ETL pipeline, its downstream reports, file processing, system maintenance, and a customer onboarding workflow) under Definitions > Jobs, plus a matching set of example Actions and Job/File/Variable Events wired to some of those jobs - for exploring dependencies, the Workflow Designer, tree layout, and event action lists. Owned by a "Schedulers" Workgroup (created if needed) so it shows a real Owner; Agent is left as-is so it's easy to point at a different one. Everything is created disabled - nothing runs until you enable it. Reloading permanently replaces the existing demo definitions (including anything in the Recycle Bin) with a clean, newly generated set; unrelated jobs are not changed.

SCHEDULE

Schedule Compile Horizon (days)

3

How many future days the nightly maintenance sweep materializes Job Runs and Group Runs for from calendar rules. Today is always compiled, so a value of N populates the schedule (Job Activity, Schedules screen) through today + N. Default 3 (Fri reaches Mon). Larger gives more forward visibility at the cost of a bigger nightly compile and more pending rows. Independent of the Calendar Forecast Horizon below, which is display-only.

Currently compiled through

2026-10-11

Compile schedule now

Runs the compile immediately instead of waiting for the next maintenance tick - use it after changing the horizon above (save first). Additive only: raising the horizon fills in the new future days; lowering it does not delete days already compiled.

Job Activity Retention (days)

30

Job Runs and Group Runs older than this are permanently deleted by the nightly maintenance sweep. Default 30 days.

Logs Retention (days)

30

Audit log entries (Operations > Logs) older than this are permanently deleted by the nightly maintenance sweep. Default 30 days.

Service Log Retention (days)

7

Rotated backend service log files under logs/ (service.out.*log / service.err.*log - the Windows service manager renames these on every restart or once the active file passes 10MB, but never deletes the old ones) older than this are permanently deleted by the nightly maintenance sweep. The currently-active service.out.log/service.err.log are never touched regardless of age. Default 7 days. In practice this pair now stays nearly empty - almost everything the app logs (including uvicorn's own startup/error output) is consolidated into traces/background_trace before instead.

ADVANCED OPTIONS

Enable AI

Shows Administration > AI Monitor for configuring the AI API key and monitoring settings. Off by default.

Enable Job Iteration

When enabled, the Job and Job Group forms show an "Iterate over values" section for fanning a definition out into one run per value. Off by default and hidden from every user until turned on here.

Require File Mover path grants

When on, File Mover transfers (File Mover jobs, File Event and orchestration copy/move-to-agent steps) may only use folders granted to the workgroup (Workgroups > File Mover), and a Runtime User needs a grant naming it. Off by default: agents and Runtime Users only need to be attached to the workgroup.

Enable Schedule Simulator

Shows the administrator-only Schedule Simulator and enables its API. Off by default.

Enable Orchestrations

Multi-step workflow pipelines built from existing Jobs (Definitions > Orchestrations, Operations > Orchestration Runs) and their API. Off by default; turning it off stops launching new orchestration steps.

Enable Version History

When enabled, the Job Group form and the Jobs grid's context menu show "Save Version" and "Version History". Off by default and hidden from every user until turned on here.

Enable Import from TIDAL

When enabled, shows the Administration > Import from TIDAL nav item and screen for migrating Jobs, Job Groups, Calendars, Events, Variables, and Actions from a TIDAL/TES install. Off by default.

Enable Import from Task Scheduler

When enabled, shows the Administration > Import from Task Scheduler nav item and screen for recreating a Windows Agent's scheduled tasks as OS Command Jobs. Off by default.

Enable Export to TIDAL

When enabled, shows the Administration > Export to TIDAL nav item and screen for pushing an OS Command Job to a live TIDAL/TES install. Off by default. The underlying TES write call is still unvalidated against a real server - test against a non-production TES first.

Also under Administration: **API Tokens** and **Webhooks** (let scripts and git hosts call IDRuns), **Resource Pools** (limit how many jobs share a resource), **Export / Import** (move definitions between systems), **High Availability**, **License** and **Log Files**.

12. Make it yours

Select the colour-scheme picker in the top bar and choose a scheme; it applies immediately and is remembered for you in this browser. It changes only how the application looks, never your data. An administrator separately chooses the **application layout** (Command Center, Classic or Sidebar) for everyone.

OPERATIONS / Job Activity

WAIT 4 ACTIVE 0 98% SUCCESS

Online Coastal admin ADMIN

Production Date 19/08/2026 Thursday

Job Activity

Job No.	Name	Run ID	Instance	Rerun Count	Events Triggered	Status
☐	014500... Health Check - API Endpoint	1	1	0	0	Completed Normally
☐	014500... Health Check - API Endpoint	192	2	0	0	Completed Normally
☐	014500... Health Check - API Endpoint	193	3	0	0	Completed Normally
☐	014500... Health Check - Database Connection	2	1	0	0	Completed Normally
☐	01450045 Disk Space Monitor	3	1	0	0	Completed Normally
☐	014500... Ping External Partner Service	4	1	0	0	Completed Normally
☐	01450047 Check License Expiration	5	1	0	0	Completed Normally
☒	01450001 Nightly ETL Pipeline	6	1			Completed Normally
☐	01450013 Nightly Reports	18	1			Completed Normally
☐	01450020 File Processing	25	1			Completed Normally
☐	01450028 System Maintenance	33	1			Completed Abnormally
☐	01450036 Customer Onboarding Workflow	41	1			Completed Normally

Color scheme

Classic Steel blue

Coastal Fresh teal

Electric Cobalt & cyan

Sunrise Coral & gold

Lime Pop Green & aqua

Berry Violet & pink

Mondrian Lines Black grid, flat

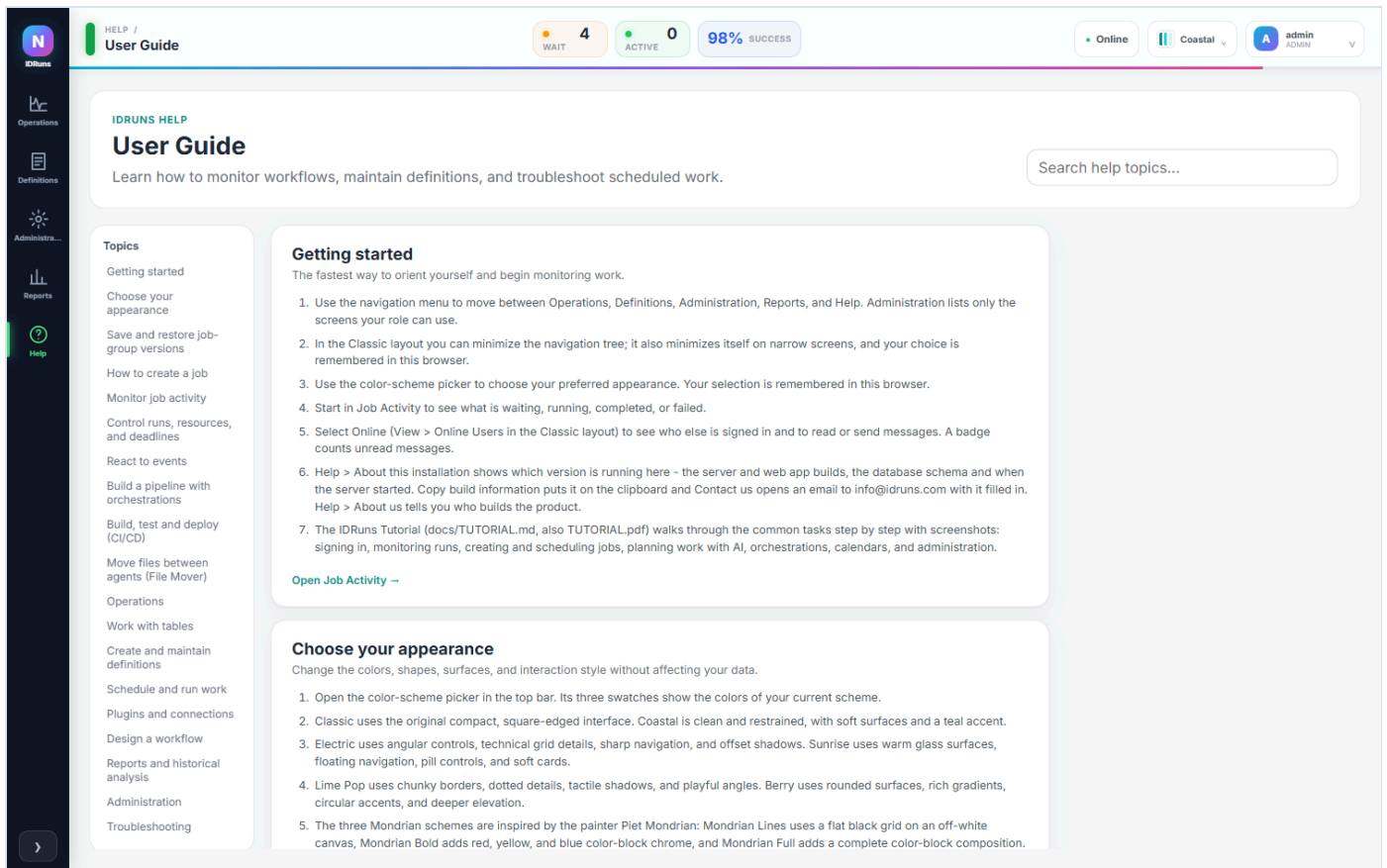
Mondrian Bold Color-black chrome

Mondrian Full Full composition

Flow Sequence

Scheduled Time

Help > User Guide is searchable and covers every option; **About this installation** shows the version running here.



On a phone or narrow window, IDRuns switches to a compact layout.

13. Quick reference: "I want to..."

I want to...	Go to
See what ran or is running today	Operations > Job Activity
Find out why a job is waiting or failed	Open the run in Job Activity, then Reports > Rest-of-Day Forecast
Run a job right now	Definitions > Jobs, right-click the job > Insert in Schedule
Create a job	Definitions > Jobs, + > OS Job
Create jobs from a description	Definitions > Jobs, + > Describe Your Job... or Plan with AI...
Put jobs on the same days and agent	Create a Job Group; set calendar and agent on the group
Choose which days a job runs	Definitions > Calendars, then the job's Schedule tab
Make one job wait for another	The job's Dependencies tab, or drag in the Workflow Designer
Email someone when a job fails	Definitions > Actions and Definitions > Events
Run a multi-step pipeline with approvals or loops	Definitions > Orchestrations
Schedule an orchestration	Orchestrations > Schedules... > Like a Job, or Cron expression

I want to...	Go to
Add an agent or a connection	Administration > Connections
Change who a job runs as	Administration > Runtime Users
Let someone sign in	Administration > Interactive Users
Set up the AI key and model	Administration > AI Monitor
Look things up	Help > User Guide