ALTAIR

Altair® Monarch® v2020.0
MONARCH SERVER
REPORT MINING EDITION –
ADMINISTRATOR'S GUIDE

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INTRODUCTION

Welcome to Altair Monarch Server Report Mining Edition.

Monarch Server Report Mining Edition is a powerful tool that allows you to extract data from structured documents or reports. Altair has further developed Monarch Server Report Mining Edition with the ability to provide the extracted data in various analytical and presentation formats for delivery over the Web. Monarch Server Report Mining Edition employs innovative technology that allows any PC or laptop connected to the Internet, or to a corporate intranet, to access reports stored in other systems. All of these capabilities make Monarch Server Report Mining Edition truly unique.

The topics in this section provide basic information about:

❑ RMS Product Components
❑ Launching MSAdmin
❑ Navigation Tree
❑ Functional buttons
❑ Page Navigation
❑ Using the Calendar

MONARCH SERVER REPORT MINING EDITION PRODUCT COMPONENTS

The RMSAdmin is a part of the Monarch Server Report Mining Edition system, which consists of these major components:

❑ **SQL database**
Monarch Server Report Mining Edition works with industry-standard SQL databases. It supports Microsoft SQL Server 2008+. A database server can be chosen from a list of supported devices based on your report volume and existing network architecture. This database supplies the underlying mechanisms for managing the internal data structures.

❑ **RMS Administrator** (RMSAdmin)
It is used by the system administrator to define the parameters of the system. RMSAdmin provides capabilities for adding models, enforcing system security, establishing user rights and privileges.

❑ **RMS Client** (RMSClient)
It contains the functionality necessary for viewing and analysis of the data from reports.

LAUNCHING MONARCH SERVER WEB ADMINISTRATOR

Since MSAdmin operates in an Intranet/Internet environment, users should be familiar with the standard techniques used to work in the Internet environment.

NOTES

Only users with administrator privileges have access to the system.

1. Launch Microsoft Internet Explorer or any other browser by clicking its shortcut.

2. Type the MSAdmin address in the **Address** bar, which may look like this: http://servername/MSAdmin.

NOTES

In Monarch Server Report Mining Edition v2020.0 that is upgraded from previous versions (e.g., v13.2), the virtual folders could still be labeled as "DSAdmin" (or "DSClient"). In this case, use "DSAdmin" (or "DSClient") instead of "MSAdmin" (or "MSClient") to open the Admin (or Client) page.

3. Press **Enter**. Your browser will load the Login page.

4. Select a locale in the upper right corner of the page. The list includes locales that were selected during the installation.

5. Type in your name as an administrator, the password and click **Sign In**. If you enter your password correctly, the main page of Report Mining Server Administrator is displayed on your screen.

NOTES

If your password has expired, the system displays the expired password page. You have to change your password. Type in your old password, a new password, confirm the new password and then click **Save**. If the new password you entered does not correspond to the requirements (for example, the length of a new password is less than the value defined by the administrator), the system displays a corresponding message.

If you try to log in to the application again while running it, a message will appear on the Login page, informing you that you have already logged in to the application. To clear the current session and log in to a new one, select the check box below the message, and click **Sign In**. This option is available only for the **Named** license type.

NAVIGATION TREE

After launching MSAdmin, at the left of the main window you see the Navigation Tree. It serves as navigation through the site. All items are expandable. It means that if you click a tree item or click an arrow by its name, the item will be expanded to the next tree level.

When you click a second-level option in the left pane, the right pane of the window displays the corresponding tab(s) with a list of items.

The Navigation Tree of MSAdmin contains links to the following sections of the system:

- **My Home**: This page is displayed by default, when you log on to MSAdmin. The right pane contains links to all sections of the system.

- RMS

    - **Content Recognition Rules**: This link allows you to automatically load models based on the content of the reports uploaded by the user.

- Portlets

    - **Portlets**: This link allows you to manage portlets. For more information, see Portlets Management.

    - **Portlet Groups**: This link allows you to manage portlet groups. For more information, see Portlet Groups.

- Server Library

    - **Folders**: This link allows you to create server library folders that include particular models, projects, and templates. For more information see Folders.

    - **Models**: This link allows you to manage models. For more information, see Models.

    - **Templates**: This link allows you to manage templates. For more information, see Templates.

    - **Bulk Edits**: This link allows you to apply text content bulk editing to Server Library items. For more information, see Bulk Edits.

- Rights and Privileges

    - **Security Provider**: This link allows you to define a security provider. For more information, see Setting Security Provider.

    - **Roles**: This link allows you to manage roles. For more information, see Roles.

    - **User Groups**: This link allows you to manage user groups. For more information, see User Groups.

    - **Users**: This link allows you to manage users. For more information, see Users.

    - **Document State Groups**: This link allows you to manage document state groups. For more information, see Document State Groups.

- System Settings

    - **System Preferences**: This link allows you to set system preferences. For more information, see System Preferences.

    - **Locale Management**: This link allows you to manage locales.

    - **Theme Management**: This link allows you to manage color themes for all MS applications. For more information, see Theme Management.

- News

    - **News Management**: When clicked displays three tabs: All News, Expired News and Global News. For more information, see Working with News.

- System Reports

    - **Configuration**: This link allows you to generate configuration reports. For more information, see Configuration Reports.

    - **Transaction**: This link allows you to generate transaction reports. For more information, see Transaction Reports.

    - **Active Users**: This link allows you to monitor active users in the system. For more information, see Active Users.

FUNCTIONAL BUTTONS

The following functional buttons are present throughout the application in the right pane:

➕ Allows you to add a new item to the list displayed in the right pane.

✏ Allows you to edit items (documents, document types, maintenance tasks and so on) from the list displayed in the right pane. Select the item to be edited, by clicking anywhere on a row, and click ✏ .

> **NOTES**
>
> Instead of clicking this button you may click the name of an item in a list.

✖ Allows you to remove items from the list displayed in the right pane.

To remove an item

1. Click ✖ at the end of the row with the item you want to delete.
2. Click **Delete** to remove the corresponding item.

> **NOTES**
>
> If an item does not contain any data, it will be removed from the list. If there are dependent items, you will not be allowed to delete it (for example, you cannot delete an index field if it is used for defining report types).

PAGE NAVIGATION

In MSAdmin, whenever an item list exceeds the **Count of Items Per Page** setting, items are listed on subsequent pages. You can access these additional pages via page navigation icons.

For example, let's say the specified **Count of Items Per Page** setting is 10. If there are 20 Report Mining Server users and you attempt to view them on the Users page, only the first 10 users will be visible. At the bottom of the users page, the page navigation icons would appear like this:
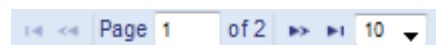
To see the remaining 10 users, you would have to click one of the page navigation icons.

> **NOTES**
>
> The two left icons are dimmed, because there are no preceding pages.
>
> You can also change the number of items to be displayed on one page, by selecting an option (**10**, **20**, **50, 100,** or **500**) from the **Items per Page** drop-down list.

To navigate between pages, type a page number in the **Page** box, at the bottom of the table, or use the page navigation buttons:

❑ To navigate to the next page, click [▶▶] .

❑ To navigate to the last page, click [▶|] .

❑ To navigate to the previous page, click [◀◀] .

❑ To navigate to the first page,click [|◀] .
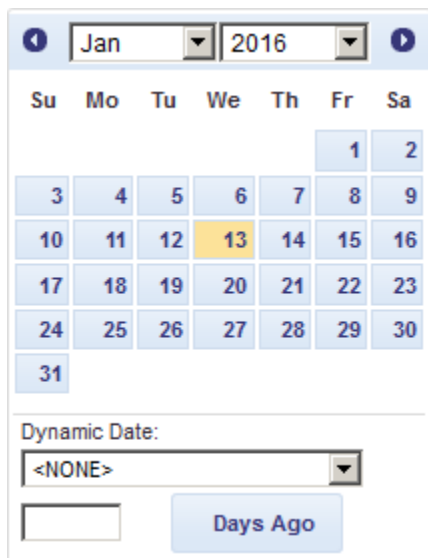
NOTES

If there are no additional pages to view all page navigation icons are disabled. The current page is the only page available.

USING THE CALENDAR

When completing input information requirements of some pages you are required to define the date. To access the **Calendar** window, click the [📅] icon next to a date field, or click the date field itself.

The **Calendar** window appears on your screen:

The left arrow navigates to the previous month, and the right arrow navigates to the next month.

To set a date

1. Select a month on the **Calendar** using arrows and then select the date.

2. Select one of the following predefined relative date values from the **Dynamic Date** list: Yesterday, End of Last Week, Start of This Quarter and so on.

3. Set a date as a number of days ago. Enter the corresponding value in the box and click **Days Ago**.

You can also use the following buttons, placed next to a date field:

- To decrease the date by one day, click ←.

- To enter the current date, click ●.

- To increase the date by one day, click →.

RMS

The topics in this section provide information applicable to the Report Mining Server application and deal with:

- ❑ [Content Recognition Rules](#)
- ❑ [Creating or Editing Content Recognition Rules](#)

CONTENT RECOGNITION RULES

Content recognition rules allow to automatically load models based on the content of the reports uploaded by the user. This relieves the user of some routine operations.

When a report is uploaded, it is searched for key words, and, in case of a match, a corresponding model is loaded.

CREATING OR EDITING CONTENT RECOGNITION RULES

The **Content Recognition Rule** dialog provides a convenient and easy way of creating a new or editing an existing **Content Recognition Rule**.

All the Content Recognition Rules are listed on the **[Content Recognition Rules](#)** page. To display it, click **RMS** on the Navigation Tree, then click **Content Recognition Rules**.

To add a new content recognition rule, click **Add New Content Recognition Rule** icon ➕ above or below the list of content recognition rules.

To delete a content recognition rule, select it, and click the **Delete** icon ✖ . You can also click the ✖ icon next to a rule to delete it.

To edit a content recognition rule, select it, and click the Edit icon ✎ .

The following fields should be filled to create a **Content Recognition Rule**:

- ❑ **Name**: The name of your rule.

- ❑ **Description**: The description of your rule, this field is hidden, to show it click Show advanced options. This field is not mandatory.

- ❑ **Max Pages to Scan**: The maximum number of page that will be searched for a pattern specified in the Criteria field.

- ❑ **Criteria**: Enter the word or phrase that you want the program to recognize. You can use wildcard characters * (to substitute for any zero or more characters) and ? (to substitute for a single character), in case you do, activate the Use wildcard check box under the Criteria field. To make the search case sensitive, activate the Case sensitive check box.

- ❑ **Models**: Lists the models that will be loaded in case of Criteria match. Clicking Add Model opens a model selection dialog.

Clicking **Save** closes the dialog and creates the rule. Clicking **Clear** clears the fields. **Cancel** closes the dialog without saving the changes.

PORTLETS

A portlet contains one or more visual elements used for presentation of data. The Portlets module allows the integration of portlets — Panopticon Workbooks — with Monarch Server Report Mining Edition. Users of RMSClient can view Panopticon Workbooks in the application according to their access rights and privileges.

Portlets are created and managed in MSAdmin. For more information, see Portlets.

For convenience, portlets are organized into portlet groups.

PORTLETS

You can add, edit, and delete portlets. To make portlets available to users, you assign the appropriate portlet access rights to users, user groups, or roles.

All available portlets are listed on the Portlets page. To display it, on the Navigation Tree, click **Portlets**, and then select **Portlets**.

Adding a Portlet

To add a portlet

1. On the Navigation Tree, click **Portlets**, and then select **Portlets**.

2. Click ✚ on the Portlets page. The **Portlet** page appears.

3. Enter a unique name of the new portlet in the **Name** field.

4. Enter any text defining the portlet in the **Description** field. This step is optional.

5. Enter the full URL to the portlet item on the Panopticon Workbooks in the **Url** field.

> **NOTES**
>
> This URL is made by combining the base URL of the portlet group to which the portlet is added and the URL of the portlet itself (i.e. the name of the workbook). Therefore, you can also specify only a unique name that identifies the workbook.

6. To save the new portlet and close the page, click **Save**.

7. The system saves the new portlet to the database and displays the updated **Portlets** page.

8. To save the new portlet and open it immediately in the editing mode for assigning portlet access rights, click the **Save/Edit** button. For more information on how to assign portlet access rights, see Steps 4-8 in "Editing a Portlet".

9. To clear all the fields, click **Clear**.

10. To close the **Portlet** page without saving, click **Cancel**. Keep in mind that no changes will be saved.

NOTES

After you have added the portlet, you have to assign access rights for it (see Editing a Portlet, steps 4-8), as well as assign it to a portlet group.

Editing a Portlet

To edit a portlet

1. On the Navigation Tree, click **Portlets**, and select **Portlets**.

2. Click the name of the portlet you want to edit or click anywhere on the row, and then click ✎ .

3. Make the necessary changes on the **Portlet** tab if required. For details about how to change portlet properties, refer to Adding a Portlet.

4. Click the **Rights** tab to assign portlet access rights to users, user groups, or roles.

NOTES

When **Global** check box is selected the portlet is available to all users. The access rights to specific portlet can also be granted on the corresponding **User**, **User Group**, or **Role** page. For more information, see Assigning Access Rights.

5. Click **User Groups** to expand a hidden section. Select user groups that you want to view the portlet.

   a. To add a user group drag it from the left pane to the right pane or click ➕ icon next to its name

   b. To remove a user group drag it from the right pane to the left pane or click ➖ icon next to its name.

   NOTES

   You may also use **Add All** and **Remove All** controls.

6. Click **Roles** to expand a hidden section. Select roles that you want to view the portlet.

   a. To add a role drag it from the left pane to the right pane or click ➕ icon next to its name

   b. To remove a role drag it from the right pane to the left pane or click ➖ icon next to its name.

   NOTES

   You may also use **Add All** and **Remove All** controls.

7. In the **Users** section, select users that you want to view the dashboard.

a. To add a user drag it from the left pane to the right pane or click ![plus icon] icon next to its name

b. To remove a user drag it from the right pane to the left pane or click ![minus icon] icon next to its name.

> **NOTES**
>
> You may also use **Add All** and **Remove All** controls.

8. To save the changes, click **Save**.

> **NOTES**
>
> For the portlet to be visible in MSClient and RMSClient to a user with the portlet access rights, the user must also have the Portlets privilege enabled at the user, user group, or role level.

Deleting a Portlet

To delete a portlet

1. On the Navigation Tree, click **Portlets**, and then select **Portlets**.
2. Click ![x icon] at the end of the row with the portlet you want to delete. A dialog box appears.
3. Click **Delete** to delete the portlet from the list.

PORTLET GROUPS

Users of RMSClient see portlets organized into logical groupings — portlet groups — and arranged according to a particular layout.

Portlet groups are managed in MSAdmin. All available portlet groups are listed on the Portlet Groups page. To display it, on the Navigation Tree, click **Portlets**, and then select **Portlet Groups**.

Use this page to add portlet groups, assign portlets to them, and set their layouts. You can also edit and delete existing portlet groups.

Adding a Portlet Group

To add a portlet group

1. On the Navigation Tree, click **Portlets**, and then select **Portlet Groups**.
2. Click ![plus icon] on the **Portlet Groups** page. The **Portlet Group** page appears.
3. **Name**: Enter a unique name of the new portlet.
4. **Description**: Optionally, enter any text defining the portlet.
5. **Base Url**: Provide the base URL of the portlets belonging to the current group.

If you have already provided the full URLs for the portlets of the group,
you can leave the **Base Url** field empty.

6. **Layout size**: Select a layout in which the portlets will be displayed for the user in the Server client application. Possible layouts range from 1x1 (1 item arranged horizontally x 1 item vertically) to 4x4 (4 items arranged horizontally x 4 items vertically).

7. **Available Portlets**: Contains the list of portlets from which you select those to be assigned to the current portlet group. To assign a portlet to the group, drag it from the left pane to the right pane or click the plus sign next to the portlet name.

8. **Assigned Portlets**: Contains the portlets that you assign to the current group. To remove a portlet from the group, drag it from the right pane to the left pane or click the minus sign next to the portlet name.

The maximum number of portlets that can be assigned to a group is 16,
which is limited by the maximum layout size 4x4.

9. **Add All**: Click to assign all available portlets to the current group.

10. **Remove All**: Click to remove all assigned portlets from the current group.

11. To save the new portlet group, click the **Save** button.
    The system saves the new portlet group to the database and displays the updated **Portlet Groups** page.

12. To reset the values, click the **Clear** button.

13. To close the **Portlet Groups** page without saving, click **Cancel**. Keep in mind that no changes will be saved.

Editing a Portlet Group

To edit a portlet group

1. On the Navigation Tree, click **Portlets**, and select **Portlet Groups**.

2. Click the name of the portlet group you want to edit or clicking anywhere on its row, and then click ✏ .

3. Make the necessary changes. For more information on how to change portlet group properties, see Adding a Portlet Group.

4. Click **Save**.
   The system saves the modified portlet group to the database and displays the updated **Portlet Groups** page.

Deleting a Portlet Group

To delete a portlet group

1. On the Navigation Tree, click **Portlets**, and then select **Portlet Groups**.

2. Click ✖ at the end of the row with the portlet group you want to delete. A dialog box appears.

3. Click **Delete** to delete the portlet group from the list.

SERVER LIBRARY

The topics in this section provide information about:

❑ [Folders](#)

❑ [Models](#)

❑ [Templates](#)

❑ [Bulk Edits](#)

As a Monarch Server Report Mining Edition administrator you can create server library folders that include particular models and templates.

Users that indicate particular server library folder name when they connect to RMS client will be able to use the models and templates assigned to it an its subfolders.

FOLDERS

You can create server library folders that include particular models and templates.

Users that indicate particular server library folder name when they connect to RMS client will be able to use the models and templates assigned to it and its subfolders.

You can use this page to do the following:

❑ [Add a folder](#)

❑ [Edit a folder](#)

❑ [Delete a folder](#)

Adding a Folder

To add a folder

1. On the Navigation Tree, click **Server Library** and select **Folders**.

2. Click ➕ on the **Folders** page. The **Folders** page appears.

3. Enter the name of a folder in the **Name** field.

4. Enter the description of a folder in the **Description** field. This step is optional.

5. In the **Available Models** section select models that you want the user to have access to.

    a. To add a model drag it from the left pane to the right pane or click ➕ icon next to its name.

    b. To remove a model drag it from the right pane to the left pane or click ➖ icon next to its name.

    > **NOTES**
    >
    > You may also use **Add All** and **Remove All** controls.

6.   In the **Available Templates** section select templates that you want the user to have access to.

   a.   To add a template drag it from the left pane to the right pane or click ➕ icon next to its name.

   b.   To remove a template drag it from the right pane to the left pane or click ➖ icon next to its name.

> **NOTES**
>
> You may also use **Add All** and **Remove All** controls.

7.   Click **Save** to save all settings done.

You can build server library folders hierarchy. Inside a folder of the root level, there might be several levels of enclosed or nested folders.

To add a nested folder

1.   Open the required folder of the root level on the on the **Folders** page.

2.   Enter the name of a folder in the **Name** field.

3.   Define the level of the nested folder in the **Hierarchy level** tree.

4.   Enter the description of a folder in the **Description** field. This step is optional.

5.   Perform actions for available projects, models, templates, specified in the previous procedure (Adding a folder).

6.   Click **Save** to save all settings of the nested folder.

When server library folders hierarchy created, on the dialogs for selecting projects, models, or templates, all these models will be displayed as a tree.

Editing a Folder

To edit a folder

1.   On the Navigation Tree, click **Server Library** and select **Folders**.

2.   Click the name of the folder you want to edit or click anywhere on its row, and then click ✏.

3.   Make the necessary changes. For details about how to change group parameters refer to Adding a Folder.

4.   To the changes, click the **Save** button.
     The system saves the modified model to the database and displays the updated **Folders** page, if the operation is completed successfully.

To assign folder to user groups, roles, or users

1.   On the Navigation Tree, click **Server Library** and select **Folders**.

2.   Select the folder you want to edit on the **Folders** page. Click the name of the folder you want to edit or click anywhere on the row, and then click ✏.

3.   Click the **Rights** tab. For more information, see Assigning Folder Access Rights.

Assigning Folder Access Rights

The creator of a folder automatically receives the rights to view and edit it.

You can assign folder access rights to other users. Authorized users can view and edit folders assigned to them in MSAdmin.

1. On the Navigation Tree, click **Server Library** and select **Folders**.

2. Click the name of the folder you want to assign access rights for.

3. On the displayed page, select the **Rights** tab.

4. Select **Global check box** for the folder to be available to all users and click the **Save** button. Otherwise, proceed to the next steps.

5. Click **User Groups** to expand a hidden section. Select the user groups that you want to have access to the folder.

   a. To add a user group, drag it from the left pane to the right pane or click ✚ icon next to its name.

   b. To remove a user group, drag it from the right pane to the left pane or click ➖ icon next to its name.

   NOTES

   You may also use **Add All** and **Remove All** controls.

6. Click **Roles** to expand a hidden section. Select the roles that you want to have access to the folder.

   a. To add a role, drag it from the left pane to the right pane or click ✚ icon next to its name.

   b. To remove a role, drag it from the right pane to the left pane or click ➖ icon next to its name.

   NOTES

   You may also use **Add All** and **Remove All** controls.

7. Click **Users** to expand a hidden section. Select the users that you want to have access to the folder.

   a. To add a user, drag it from the left pane to the right pane or click ✚ icon next to its name.

   b. To remove a user, drag it from the right pane to the left pane or click ➖ icon next to its name.

   NOTES

   You may also use **Add All** and **Remove All** controls.

8. To apply the changes, click the **Save** button.

   NOTES

   If you don't specify any access rights for a folder, then it will be available for all users.

Deleting a Folder

To delete a folder from the list

1. On the Navigation Tree, click **Server Library** and select **Folders**.

2. Click ✖ at the end of the row with the folder you want to delete. A dialog box appears.

3. Click **Delete** to delete the folder from the list.

MODELS

A model file, created within Monarch, is a file with a .dmod or .xmod extension that may contain field, filter, summary and chart definitions as well as other settings. Typically, all Monarch models are created by a system administrator.

Creating a model file is one of the first steps you need to perform, as you cannot define a document type or archive documents into the system without specifying a model file. (Refer to the Altair documentation for detailed information on the model creation process.)

All models used in the Report Mining Server system are listed on the Models page. Each model is defined by a Monarch model file.

To display the **Models** page, on the Navigation Tree, click **Server Library** and select **Models**.

You can use this page to do the following:

❑   Add a model

❑   Edit a model

❑   Delete a model

❑   Change state of a model

Adding a Model

To add a model

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. Click ✚ on the **Models** page. The **Model** page appears.

3. Enter the name of a model file in the **Name** field.

4. Enter the description of a model in the **Description** field. This step is optional.

5. To enter the path to a model file in the **Model** field click the **Browse** button and select a model file.

6. Enter any comments if necessary in the **Comment** field.

7. Assign the model to a new or existing folder in the **Assign to Folders** field. To add the model to a new folder, click **Create New Folder.**

8. To save a model, click **Save**.
   The system saves the new model to the database and displays the updated **Models** page, if the operation is completed successfully.

9. To reset the recent changes, click the **Clear** button.

10. To cancel the operation and return to the **Models** page, click the **Cancel** button.

To upload a model

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. Click **Upload Models** on the **Models** page.

3. Click **Add Files** to browse to a model file or drag and drop model file in the **Drop files here** area.

4. To save a model, click **Save**.
   The system saves the new model to the database and displays the updated **Models** page, if the operation is completed successfully.

5. To reset the recent changes, click the **Clear** button.

6. To cancel the operation and return to the **Models** page, click the **Cancel** button.

To replace model file paths

1. Expand the **Replace Paths** section. You will see a list of external models and lookup files. Those files that could not be found are marked with a warning sign.

2. Click the **Browse** button for the file, select the file path, then click **OK**.

3. Select the **Replace** checkbox for the file you want to replace path.

4. Click the **Save** button.

Editing a Model

Models can be edited via the Models page.

To edit a model

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. Select the model you want to edit on the **Models** page:

   Click the name of the model you want to edit or click anywhere on the row, and then click ✎ .

3. Make the necessary changes.

> **NOTES**
>
> You can choose to check the modification applied to the model being edited. To do this, select the **Check dependencies on model fields (may slow down save operation)** checkbox.

For details about how to change model parameters refer to <u>Adding a Model</u> topic.

> **NOTES**
>
> If changes are made to a model that is used by several projects, the new model (with changes) can be re-uploaded. On the **Models** page, click the **Browse** button, and select the new model. Proceed to Step 4. The new model is then used in the projects.

4. To save the changes, click the **Save** button.
   The system saves the modified model to the database and displays the updated Models page, if the operation is completed successfully.

To view and restore model revisions

You can view or restore model revisions any time using the **Revisions** tab.

1. On the Navigation Tree, click **Server Library**, and select **Models**.

2. Click the name of the model file you want to restore a revision for or click anywhere on its row, and then click
   .

3. On the displayed page, select the **Revisions** tab.

4. Choose the revision to be restored, and then click the corresponding Restore icon .

5. A prompt displays. Click **Ok** to proceed.

   The restored revision occupies the latest entry in the list of revisions in the **Revisions** tab.

To delete a model revision

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. Click the name of the model file you want to delete a revision for or click anywhere on its row, and then click .

3. On the displayed page, select the **Revisions** tab.

4. Choose which revision to delete by clicking anywhere on its row, and then click the Delete button found at the end of the row or on the top left-hand side of the Revisions page.

5. A prompt displays. Click **Delete** to proceed with the deletion.

To assign model to user groups, roles, or users

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. Select the model you want to edit on the **Models** page. Click the name of the model you want to edit or click anywhere on the row, and then click .

3. Click the **Rights** tab. For more information, see Assigning Model Access Rights.

Assigning Model Access Rights

The creator of a model automatically receives the rights to view and edit it.

You can assign model access rights to other users. Authorized users can view and edit models, assigned to them, in MSAdmin.

To assign model access rights

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. Click the name of a model you want to assign access rights for.

3. On the displayed page, select the **Rights** tab.

4. Select **Global** check box for a model to be available to all users and click the **Save** button.
   Otherwise proceed to the next steps.

5. Click **User Groups** to expand a hidden section. Select user groups that you want to have access to the model.

   a. To add a user group drag it from the left pane to the right pane or click icon next to its name

   b. To remove a user group drag it from the right pane to the left pane or click icon next to its name.

6. Click **Roles** to expand a hidden section. Select roles that you want to have access to the model.

    a. To add a role drag it from the left pane to the right pane or click ➕icon next to its name

    b. To remove a role drag it from the right pane to the left pane or click ➖icon next to its name.

7. In the **Users** section select users that you want to have access to the model.

    a. To add a user drag it from the left pane to the right pane or click ➕icon next to its name

    b. To remove a user drag it from the right pane to the left pane or click ➖icon next to its name.

8. To apply the changes, click the **Save** button.

Deleting a Model

You can delete a model from the system via the Models page.

To delete a model from the list

1. On the Navigation Tree, click **Server Library** and select **Models**.
2. Click ✖ at the end of the row with the model you want to delete. A dialog box appears.
3. Click **Delete** to delete the model from the list.

If a model has the *Locked* status (🔒), it cannot be deleted. First unlock
the model and then try again.

Changing Model State

On the **Models** page you can change model state to locked or unlocked. When a model is locked, it cannot be edited
or deleted.

To change model state

1. On the Navigation Tree, click **Server Library** and select **Models**.

2. On the Models page, select a model from the list and click the **Lock** icon at the end of the row:

   - 🔒 - means that a model is locked

   - 🔓 - means that a model is unlocked

3. To unlock all models at once click the **Release all locks** icon (🔓) located below the model list.

TEMPLATES

Monarch Server Report Mining Edition users can apply templates to documents when exporting them. All templates
used in the system are listed on the Templates page. To access this page, on the Navigation Tree, click **Server
Library** and select **Templates**. You can use this page to do the following:

- ❑ Add a template
- ❑ Edit a template
- ❑ Delete a template
- ❑ Change state of a template

Each template type is available only under the appropriate license.

Adding a Template

To add a template

1. On the Navigation Tree, click **Server Library** and select **Templates**.

2. On the displayed page, click the **Add** icon ➕ .

3. Enter the name of a new template in the **Name** field.

4. Enter template description if necessary in the **Description** filed.

5. Select template type from the drop-down list in the **Type** field.

6. Click the **Browse** button to locate the template file.

7. Enter any comments if necessary in the **Comment** field.

8. Assign the template to a new or existing folder in the **Assign to Folders** field. To add the template to a new folder, click **Create New Folder.**

9. To save changes, click **Save**.
    The system saves the new template to the database and displays the updated Templates page, if the operation is completed successfully.

10. To reset the recent changes, click the **Clear** button.

11. To cancel the operation and return to the **Templates** page, click the **Cancel** button.

To upload a template

1. On the Navigation Tree, click **Server Library** and select **Templates**.

2. Click Upload Templates on the Templates page.

3. Click **Add Files** to browse to a template file or drag and drop template file in the **Drop files here** area.

4. To save a template, click **Save**.
   The system saves the new template to the database and displays the updated **Templates** page, if the operation is completed successfully.

5. To reset the recent changes, click the **Clear** button.

6. To cancel the operation and return to the **Templates** page, click the **Cancel** button.

Editing a Template

To edit a template

1. On the Navigation Tree, click **Server Library** and select **Templates**.

2. Click the name of the template you want to edit on the **Templates** page or click anywhere on the row, and then click .

3. Make the necessary changes. For details about how to change template parameters refer to <u>Adding a Template</u> topic.

4. Click the **<u>Rights</u>** <u>tab</u> to assign template to user groups, roles or users. They can then apply the templates to exported documents.

5. Click **Save**. The system saves the modified template to the database and displays the updated Templates page, if the operation is completed successfully.

To view and restore template revisions

You can view or restore template revisions any time using the **Revisions** tab.

1. On the Navigation Tree, click **Server Library**, and select **Templates**.

2. Click the name of the template file you want to restore a revision for or click anywhere on its row, and then click .

3. On the displayed page, select the **Revisions** tab.

4. Choose the revision to be restored, and then click the corresponding Restore icon .

5. A prompt displays. Click **Ok** to proceed.

The restored revision occupies the latest entry in the list of revisions in the **Revisions** tab.

1. On the Navigation Tree, click **Server Library** and select **Templates**.

2. Click the name of the template file you want to delete a revision for or click anywhere on its row, and then click ✏.

3. On the displayed page, select the **Revisions** tab.

4. Choose which revision to delete by clicking anywhere on its row, and then click the **Delete** button ✖ found at the end of the row or on the top left-hand side of the Revisions page.

5. A prompt displays. Click **Delete** to proceed with the deletion.

1. On the Navigation Tree, click **Server Library** and select **Templates**.

2. Select the template you want to edit on the **Templates** page. Click the name of the template you want to edit or click anywhere on the row, and then click ✏.

3. Click the **Rights** tab. For more information, see [Assigning Template Access Rights.](#)

Assigning Template Access Rights

The creator of a template automatically receives the rights to view and edit it.

You can assign template access rights to other users. Authorized users can view, edit and use templates assigned to them in MSAdmin.

1. On the Navigation Tree, click **Server Library** and select **Templates**.

2. Click the name of a template you want to assign access rights for.

3. On the displayed page, select the **Rights** tab.

4. Select **Global** check box for a template to be available to all users and click the **Save** button.
    Otherwise proceed to the next steps.

5. Click **User Groups** to expand a hidden section. Select user groups that you want to have access to the template.

    a. To add a user group drag it from the left pane to the right pane or click ➕ icon next to its name

    b. To remove a user group drag it from the right pane to the left pane or click ➖ icon next to its name.

    NOTES

    You may also use **Add All** and **Remove All** controls.

6. Click **Roles** to expand a hidden section. Select roles that you want to have access to the template.

    a. To add a role drag it from the left pane to the right pane or click ➕ icon next to its name

    b. To remove a role drag it from the right pane to the left pane or click ➖ icon next to its name.

    NOTES

    You may also use **Add All** and **Remove All** controls.

7. In the **Users** section you can select users that you want to have access to the template.

   a. To add a user drag it from the left pane to the right pane or click ✚ icon next to its name

   b. To remove a user drag it from the right pane to the left pane or click ▬ icon next to its name.

   NOTES

   You may also use **Add All** and **Remove All** controls.

8. To apply the changes, click the **Save** button.

   NOTES

   If you don't specify any access rights for a template file, then it will be available for all users.

Deleting a Template

You can delete a template from the system via the Templates page.

To delete a template from the list

1. On the Navigation Tree, click **Server Library** and select **Templates**.
2. Click ✖ at the end of the row with the template you want to delete. A dialog box appears.
3. Click **Delete** to delete the template from the list.

   NOTES

   If a template has the *Locked* status (🔒), it cannot be deleted. First unlock the template and then try again.

Changing Template State

On the **Templates** page you can change template state to locked or unlocked. When a template is locked, it cannot be edited or deleted.

To change template state

1. On the Navigation Tree, click **Server Library** and select **Templates**.
2. On the Templates page, select a template from the list and click the **Lock** icon at the end of the row:

- - means that a template is locked

- - means that a template is unlocked

3. To unlock all templates at once click the **Release all locks** icon ( ) located below the template list.

BULK EDITS

The **Bulk Edits** feature of the Report Mining Server administrator allows you to apply text content bulk editing to models, alerts, distributions, and project objects.

To use bulk editing

1. On the Navigation Tree, click **Server Library**, and select **Bulk Edits**.

2. On the displayed page, enter the text fragment you want to edit in the **Find** text box. You can combine your text fragments with "*" and "?" wildcards in the Find text box to leverage your search query. If you select the Ignore Wildcards check box, the wildcards will not be applied during the search.

3. Enter the text fragment with which you want to replace the original fragment in the **Replace** text box.

4. Define the appropriate Server Library (**Models** and **Templates**) where you want to perform bulk editing by selecting the corresponding check boxes in the Find in line. You can assign bulk editing to the whole definition object or to its particular settings, for example, to Channel links and titles of the alerts log only. On hovering the corresponding check box, the pop-up hierarchy tree of the nested check boxes appear. You can also apply bulk editing to all Server Library by selecting all check boxes.

5. Click **Find** if you want just view the results of your search query. The results are displayed in the Search Results table that contains the detailed definition object information, namely, the object name, its settings and values. In the table, you can mark out all or some required object items for further replacement.

6. Click **Replace** if you want to apply the assigned bulk editing for the specified Server Library. Executed changes are irreversible.

RIGHTS AND PRIVILEGES

Report Mining users should be given privileges to carry out such tasks as defining searches, creating notifications, etc.

Report Mining Server administrator should also provide users with the rights to access objects.

In the following sections you will learn:

❑ How to assign privileges to roles, user groups and users

❑ How to assign access rights

❑ How to set a security provider

❑ How to manage roles

❑ How to manage user groups

❑ How to manage users

ASSIGNING PRIVILEGES

When you grant privileges to roles, user groups or users, you specify which actions the role members, group members or users can perform within Monarch Server Report Mining Edition.

The following privileges can be granted:

❑ Common privileges

• **Administrator**: Allows users to log on to MSAdmin.

• **Portlets**: Allows users to view portlets — Panopticon Workbooks — in Client.

❑ RMS privileges

• **RMS User**: Allows the user to connect to RMS Client.

• **RMS Administrator**: Provides the user with full administration rights to Monarch Server Report Mining Edition.

To grant privileges

1. On the Navigation Tree, click **Rights and Privileges**, and select **Roles**, **User Groups** or **Users** (depending on who you want to assign privileges to.

2. Click the name of a role, user group or user Select a role, user group or user, by clicking anywhere on the row, and then click [pencil icon].

3. In the **Privileges** box, select the necessary check boxes to specify the privileges for the role, user group or user.

4. Click **Save** to save the current privileges settings.

ASSIGNING ACCESS RIGHTS

When you assign access rights to a role, user group or user, you grant them access to a particular part of the MS system.

Keep in mind that access rights in MS are cumulative (for example, access rights of a role are added to those of any user or user group assigned to it).

To assign access rights

1. On the Navigation Tree, click **Rights and Privileges**, and select **Roles**, **User Groups** or **Users**, depending on who you want to assign rights to.

2. Select a role, user group, or a user. Click its name or click anywhere on the row, and then click ✎.

3. Select a tab to specify appropriate rights at the top of the page. The following tabs are available:

   - **Views**: Allows to grant access to RMS views.

   - **Models** tab allows you to assign models to the current user.

   - **Templates**: Allows to grant access to templates templates for the role, user group or user.

   - **Portlets**: Allows to grant access to specific portlets for the role, user group or user.

4. Assign the appropriate rights.

5. To save changes, click **Save**.

6. Repeat steps 3-5 until you have assigned all desired rights to a role, user group or user.

SETTING SECURITY PROVIDER

A security provider provides the system with security information about user groups and users, as well as checks user passwords for validity.

To select the security provider of the system, on the Navigation Tree, click **Rights and Privileges**, and select **Security Provider**.

You can select one of the following options:

❑ **Active Directory**. The system is supported by Active Directory Authentication, which is based on (and integrated with) the security system of Windows NT.

❑ **Default**. The default provider presents an ordinary security model dealing with roles, groups and users, which are kept in the MS database. The default provider does not interact with security systems.

❑ **Strong password provider**. The Strong Password Provider supports the same security model as the default provider, but applies stricter rules to passwords. In particular it supports password history, length limitation and expiration period. If you select this option, you can specify the following settings:

   - **Number of passwords stored in the history**: The valid values are integers in the range 0 - 100. This value specifies the number of last used passwords that the system remembers for each user. The system does not allow assigning a new password, if it is in the password history. Zero value disables this functionality. The default value is 15.

   - **Minimum password length**: The valid values are integers in the range 0 - 128. The value specifies the minimum password length. Zero value disables this functionality. The default value is equal to 7.

   - **Password age in days**: The valid values are integers in the range 0 - 365. The value specifies the number of days after which the password will expire. Zero value disables this functionality. The default value is 30 days.

- **Password must meet complexity requirements**: This check box enables validation of complexity requirements for the password. These requirements include the following rules: within the password string user must use at least three characters out of the four types of characters: digits (0-9), upper case alpha characters (A-Z), lower case alpha characters (a-z), and special characters which are pretty much the rest of the keyboard.

- **Force a new user to change the password at first logon**: If you select this check box, a user must change the password at the first logon, in case an administrator does not set a password for the user.

NOTES

All the settings of the Strong Password Provider are global and have effect for all users.

- **Show SSO**: Select this check box and the **Active Directory** option, to enable the user to sign in to the system by clicking the **SSO** link on the Login page, without having to type the name and password each time.

- **Enable Active Directory Group Lookup**: to allow searching and importing user groups on the Importing a User Group page.

ROLES

Roles are used to set rights and privileges for users and user group. A role can include both user groups and users, but cannot include other roles. A role is kept in the database and has no tie with other security systems. An administrator can define rights via roles (Role Based Security) or assign them to user groups and users individually.

All roles used in the system are listed on the Roles page. To display the Roles page, on the Navigation Tree, click **Rights and Privileges** and select **Roles**.

Use this page to set rights and privileges for roles, as well as to add, edit, or remove roles from the list.

Adding a Role

Roles allow you to quickly assign specific access rights and privileges to a user or user group. Because access rights and privileges in Monarch Server Report Mining Edition are cumulative, when you add a user or user group to a role, the user or user group members are granted the role's access rights and privileges in addition to their own.

To add a role

1. On the Navigation Tree, click **Rights and Privileges**, and select **Roles**.

2. Click ＋ on the **Roles** page. The **Role** page containing the following items appears:

   - **Role Name**: Enter a unique name of a new role.

   - **Description**: Optionally, enter any text defining the role.

   - **Privileges**: By selecting check boxes, an administrator can grant the following privileges:

     - **Administrator**: Allows the user to log on to MSAdmin.

     - **SaaS Administrator**: Allows the user limited administration.

     - **Portlets:** Allows the user to view Panopticon Workbooks in MSClient.

     - **RMS User**: Allows the user to connect to RMS Client.

     - **RMS Administrator**: Allows the user to log on to RMSAdmin.

- **Members**: Click this heading to expand hidden sections.
  - **Available User Groups**: Displays all available user groups from which you can select ones to assign to the current role. To add a user group, drag it from the left pane to the right pane.
  - **Selected User Groups**: The user groups in this pane will be assigned to the current role. To remove a user group, drag it from the right pane to the left pane.
  - **Available Users**: Displays all available users from which you can select ones to assign to the current role. To add a user, drag it from the left pane to the right pane.
  - **Selected Users**: The users in this pane will be assigned to the current role. To remove a user, drag it from the right pane to the left pane.
- **Save**: Click to save a new role and close the page.
- **Clear**: Click to clear all the boxes.
- **Save/Edit**: Click to save a new role and display additional tabs.
- **Cancel**: Click to cancel the operation.
- **Copy Profile**: Opens a dialog box, where you can select a role. All its settings will be copied. You can make the necessary changes.

3. Fill in the boxes of the page and click **Save**. The system saves the new role to the database and displays the updated Roles page, if the operation is completed successfully.

NOTES

After you have created a role, you can assign access rights to it. For details, see Assigning Access Rights.

Editing a Role

To edit a role

1. On the Navigation Tree, click **Rights and Privileges**, and select **Roles**.

2. Click the name of the role you want to edit or click anywhere on the row, and then click ✏. The **Role** page appears.

3. Make the necessary changes. For more information on how to change its items, see Adding a Role.

4. To grant access rights, select an appropriate tab at the top of the page. The following tabs are available in the **Edit** mode:

- **Views** tab allows you to specify what RMS views page will be available for the current role. To do this, select or clear appropriate check boxes, and click **Save**.

- **Settings** tab allows you to modify the notification settings, particularly the number of days when an alert about license expiration will be shown.

NOTES

The **Defined** check box is disabled by default. If the setting is not "Defined," then the global setting under System Preferences applies.

- **Portlets** tab allows you to assign portlet access rights to the current user role.

- **Templates** tab allows you to assign document templates to the current role. To do this, select a document type from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

- **Models** tab allows you to assign models to the current user. To do this, drag appropriate items from the left pane to the right pane, and click **Save**.

5. Make the necessary changes and click **Save**.
   The system saves the modified role to the database and displays the updated **Roles** page, if the operation is completed successfully.

Deleting a Role

To delete a role

1. On the Navigation Tree, click **Rights and Privileges**, and select **Roles**.

2. Click ✖ at the end of the row with the role you want to delete. A dialog box appears.

3. Click **Delete** to delete the role from the list.

USER GROUPS

User groups allow you to quickly assign specific access rights and privileges to users.

A user group can include both user groups and users. A user group is kept in the database and has no tie with other security systems. An administrator can define rights via user groups or assign them to users individually.

Access rights and privileges in Monarch Server Report Mining Edition are cumulative. It means that when you add a user to a user group, the user is granted the group's access rights and privileges.

All user groups used in the system are listed on the User Groups page. To display the User Groups page, on the Navigation Tree, click **Rights and Privileges** and select **User Groups**.

Use this page to set access rights and privileges for user groups, as well as to add, import, edit, or remove user groups from the list.

Adding a User Group

To add a user group

1. On the Navigation Tree, click **Rights and Privileges**, and select **User Groups**.

2. Click ✚ on the **User Groups** page. The **User Group** page containing the following items appears:

   - **User Group Name**: Enter a unique name of a new user group.

   - **Description**: Optionally, enter any text defining the user group.

   - **Alias**: Active Directory group name. This field is filled out automatically if you apply user group importing.

   NOTES

   Alias is only available when the **Enable Active Directory Group Lookup** checkbox in **Active Directory** is selected.

- **Privileges**: By selecting check boxes, an administrator can grant the following privileges:

  - ◆ **Administrator**: Allows the user to log on to MSAdmin.

  - ◆ **SaaS Administrator**: Allows the user limited administration.

  - ◆ **Portlets:** Allows the user to view Panopticon Workbooks in MSClient.

  - ◆ **RMS User**: Allows the user to connect to RMS Client.

  - ◆ **RMS Administrator**: Allows the user to log on to RMSAdmin.

- **Members**: Click this heading to expand the hidden sections.

  - ◆ **Available User Groups**: Displays all available user groups from which you can select ones to assign to the current user group. To select a user group, drag it from the left pane to the right pane.

  - ◆ **Selected User Groups**: The user groups in this pane will be assigned to the current user group. To remove a user group, drag it from the right pane to the left pane.

  - ◆ **Available Users**: Displays all available users from which you can select ones to assign to the current user group. To add a user, drag it from the left pane to the right pane.

  - ◆ **Selected Users**: The users in this pane will be assigned to the current user group. To remove a user, drag it from the right pane to the left pane.

- **Members of**: Click this heading to expand the hidden sections.

  - ◆ **Available User Groups**: Displays all available user groups from which you can select ones to assign the current user group to. To add a user group, drag it from the left pane to the right pane.

  - ◆ **Selected User Groups**: The current user group will be assigned to the user groups in this pane. To remove a user group, drag it from the right pane to the left pane.

  - ◆ **Available User Roles**: Displays all available user roles from which you can select ones to assign to the current user group. To select a user role, drag it from the left pane to the right pane.

  - ◆ **Selected User Roles**: The user roles in this pane will be assigned to the current user group. To remove a user role, drag it from the right pane to the left pane.

- **Save**: Click to save a new user group and close the page.

- **Clear**: Click to clear all the boxes.

- **Save/Edit**: Click to save a new user group and display additional tabs.

- **Cancel**: Click to cancel the operation.

- **Copy Profile**: Opens a dialog box, where you can select a user group. All its settings will be copied. You can make the necessary changes.

3. Fill in the boxes of the page and click **Save**. The system saves the new user group to the database and displays the updated User Groups page, if the operation is completed successfully.

NOTES

After you have created a user group, you can assign access rights to it.
For details refer to Assigning Access Rights.

Importing a User Group

You can import user groups from Active Directory of the user under which Monarch Server Agent Service is running. Use the **Import Groups** button for importing user groups.

The **Import Groups** button is available if Security Provider is selected from Active Directory and the Monarch Server Agent Service runs as user in Active Directory.

When a user from Active Directory logs in Monarch Server Report Mining Edition Admin or Client, the system starts checking all groups in the Active Directory in which the given user has membership. The checking is executed by the **sAMAccountName** parameter. The system checks whether the **sAMAccountName** parameter matches the **Alias** parameter of Monarch Server Report Mining Edition groups. In case of matches, privileges of all Monarch Server groups are granted to the given user during the current session only.

Editing a User Group

To edit a user group

1. On the Navigation Tree, click **Rights and Privileges**, and select **User Groups**.

2. Click the name of the user group you want to edit or click anywhere on the row, and then click . The User Group page appears.

3. Make the necessary changes. For details about how to change its items, refer to Adding a User Group.

4. To grant access rights, select an appropriate tab at the top of the page. The following tabs are available in the **Edit** mode:

    - **Views** tab allows you to specify what RMS views page will be available for the current user group. To do this, select or clear appropriate check boxes, and click **Save**.

    - **Settings** tab allows you to modify the notification settings, particularly the number of days when an alert about license expiration will be shown.

    NOTES

    The **Defined** check box is disabled by default. If the setting is not "Defined," then the global setting under System Preferences applies.

    - **Templates** tab allows you to assign document templates to the current user group. To do this, select a document type from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

    - **Models** tab allows you to assign models to the current user group. To do this, drag appropriate items from the left pane to the right pane, and click **Save**.

    - **Portlets** tab allows you to assign portlet access rights to the current user user group.

5. Make the necessary changes and click **Save**. The system saves the modified user group to the database and displays the updated User Groups page, if the operation is completed successfully.

Deleting a User Group

To delete a user group

1. On the Navigation Tree, click **Rights and Privileges**, and select **User Groups**.

2. Click   at the end of the row with the user group you want to delete. A dialog box appears.

3. Click **Delete** to delete the user group from the list.

USERS

Before customers can log on to Monarch Server, an administrator must add them to the list of users on the Users page, and specify their access rights and privileges.

All users working in the system are listed on the Users page. A user is kept in the Monarch Server database and has no tie with other security systems.

To display the Users page, on the Navigation Tree, click **Rights and Privileges**, and select **Users**.

Use this page to set rights and privileges for users, as well as to add, edit, or remove users from the list.

An administrator can assign rights to users individually.

Adding a User

To add a user

1. On the Navigation Tree, click **Rights and Privileges**, and select **Users**.

2. Click ⊞ on the **Users** page. The **User** page containing the following items appears:

   - **User Name**: Enter a unique name of a new user. This name will be used as a logon name.

   - **Full Name**: This name will be displayed in all user lists and therefore must be unique. It is recommended that **User Name** NOT be the same as **Full Name** for security reasons.

   - **Password**: Type a password.

   - **Confirm Password**: Type the same password once again.

   - **Network Alias**: Select an Active Directory user name.

   > **NOTES**
   >
   > This field is available only if the security provider is set other than **Default**.

   - **E-mail Address**: Enter an e-mail address of the current user.

   - **User Class**: **Persistent** or **Dynamic**. This value is assigned automatically and displayed for reference only.

   - **Locked**: Select this check box, if you want to lock the current user and prevent their access to the system.

   - **Privileges**: By selecting check boxes, an administrator can grant the following privileges:

       ◆ **Administrator**: Allows the user to log on to MSAdmin.

       ◆ **SaaS Administrator**: Allows the user limited administration.

       ◆ **Portlets:** Allows the user to view Panopticon Workbooks in MSClient.

       ◆ **RMS User**: Allows the user to connect to RMS Client.

       ◆ **RMS Administrator**: Allows the user to log on to RMSAdmin.

   - **Members of**: Click this heading to expand the hidden sections.

       ◆ **Available User Groups**: Displays all available user groups from which you can select ones to assign the current user to. To add a user group, drag it from the left pane to the right pane.

       ◆ **Selected User Groups**: The current user will be assigned to the user groups in this pane. To remove a user group, drag it from the right pane to the left pane.

- ◆ **Available Roles**: Displays all available roles from which you can select ones to assign the current user to. To add a role, drag it from the left pane to the right pane.
- ◆ **Selected Roles**: The current user will be assigned to the roles in this pane. To remove a role, drag it from the right pane to the left pane.

NOTES

The default user groups and roles available in the list of available user groups and roles for the new user are those specified in the **New User Defaults** settings in **System Preferences** under **System Settings**. See **Groups and Roles**.

- • **Save**: Click to save a new user and close the page.
- • **Clear**: Click to clear all the boxes.
- • **Save/Edit**: Click to save a new user and display additional tabs.
- • **Cancel**: Click to cancel the operation.
- • **Copy Profile**: Opens a dialog box, where you can select a user. All its settings will be copied. You can make the necessary changes.

3. Fill in the boxes of the page, and click **Save**.
The system saves the new user to the database and displays the updated Users page, if the operation is completed successfully.

NOTES

After you have created a user, you can assign access rights to it. For details refer to Assigning Access Rights.

Changing User Password

As an MSAdmin, you can change an Monarch Server user's password at any time.

To change a user's password

1. On the Navigation Tree, click **Rights and Privileges**, and select **Users**.

2. Click the name of the user you want to change a password for or clicking anywhere on its row, and then click .

3. Type a password in the **Password** and **Confirm Password** boxes, then click **Save**.

NOTES

If you are using a non-default security provider, the password will be changed in the target security system.

Editing a User

To edit a user

1. On the Navigation Tree, click **Rights and Privileges**, and select **Users**.

2. Click the name of the user you want to edit or click anywhere on the row, and then click ✏ . The User page appears.

3. Make the necessary changes. For details about how to change its items refer to Adding a User.

4. To assign a temporary password to a user, type a password in the **Password** and **Confirm Password** boxes, and click **Save**.

5. To grant access rights, select an appropriate tab at the top of the page. The following tabs are available:

   - **Views** tab allows you to specify what RMS views page will be available for the current user. To do this, select or clear appropriate check boxes, and click **Save**.

   - **Settings** tab allows you to modify the notification settings, particularly the number of days when an alert about license expiration will be shown.

   > **NOTES**
   >
   > The **Defined** check box is disabled by default. If the setting is not "Defined," then the global setting under System Preferences applies.

   - **Templates** tab allows you to assign document templates to the current user. To do this, select a document type from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

   - **Models** tab allows you to assign models to the current user. To do this, drag appropriate items from the left pane to the right pane, and click **Save**.

   - **Portlets** tab allows you to assign portlet access rights to the current user.

6. Make the necessary changes, and click **Save**.
   The system saves the modified user to the database and displays the updated Users page, if the operation is completed successfully.

Deleting a User

To delete a user

1. On the Navigation Tree, click **Rights and Privileges**, and select **Users**.

2. Click ✖ at the end of the row with the user you want to delete. A dialog box appears.

3. Click **Delete** to delete the user from the list.

SYSTEM SETTINGS

In this section you will learn how to change:

- ❑ [System preferences](#)
- ❑ [Application settings](#)
- ❑ [Information to be displayed in the "About" dialog box](#)
- ❑ [System default settings](#)
- ❑ [Default settings for a new user](#)
- ❑ [Global user settings](#)
- ❑ [PDF default print settings](#)
- ❑ [Color theme](#)
- ❑ [RMS Settings](#)

SYSTEM PREFERENCES

To access the **System Preferences** page, on the Navigation Tree, click **System Settings**, and select **System Preferences**.

The following tabs are available on the **System Preferences** page:

- ❑ **System Preferences**: Set system preferences.
- ❑ **Application Settings:** Set application default preferences.
- ❑ **About Information**: Specify product and company information, which is displayed in the **About** dialog box.
- ❑ **System Defaults**: Set default parameters to be used when creating new volumes and filing tasks.
- ❑ **New User Defaults**: Set default parameters that will be applied to a new user.
- ❑ **Global User Settings**: Set global parameters that will be applied to every user.
- ❑ **PDF Default Print Settings**: Set default PDF parameters that will be applied to every user.
- ❑ **RMS Settings**: Set RMS settings.

On the **System Preferences** tab you can specify the following settings:

System Preferences

- ❑ **Maximum transaction report size**: Define the maximum number of rows to read from the MS Transaction database.
- ❑ **Dynamic search on lists**: Select this check box to enable the auto-suggest feature in MSClient, when the user types an index value on the **Simple Search** page, or a report name on the Reports List or search criteria in all object lists in MSAdmin application.
- ❑ **Display "data" items in the Administrator navigation tree**: The check box allows an administrator to show/hide "data" items on the Navigation Tree. As the amount of data may total up to hundreds of document groups, types, index fields, filing tasks and so on, it can be useful to hide all these items for easier navigation.

- ❑ **Expand Administrator Tree**: Select this check box, if you want the MSAdmin Navigation Tree to be expanded to second-level navigation options by default.
- ❑ **Hide advanced content:** Select this check box to hide some advanced options in the Navigation Tree and object settings.

NOTES

No matter whether the **Hide advanced content** check box is selected or deselected, you can hide non-mandatory items by clicking the **Hide advanced options** heading inside the given section. To display them, click the **Show advanced options** heading.

- ❑ **Implementation Name**: This optional name will be displayed on the Login page and on the **Welcome** line of the user interface.

PDF Security

- ❑ **Enable secure PDF output**: Select this check box to disable editing and printing of the exported PDF document by client. By default this check box is cleared.
- ❑ **Owner password**: Enables editing and printing of the exported PDF document only after entering the password. If no password is specified only export is allowed for all clients.
- ❑ **User password**: Enables export of the PDF document only after entering the password. If no password is specified export is allowed for all clients.

Session Expiration Alert

- ❑ **Admin timer of session expiration (minutes)**: Specify the time of session expiration alert appearance before the end of session for MSAdmin application.
- ❑ **Client timer of session expiration (minutes)**: Specify the time of session expiration alert appearance before the end of session for Client applications.

Notification Settings

- ❑ **Show alert before license expiration (days)**: Specify when to show an alert about license expiration. The default setting is 30 days, i.e., you will see an alert banner at the bottom part of the page 30 days before your license expires. An alert icon will be visible on the top right portion of the page; it allows you to hide/display the alert banner.

NOTES

- No alert will be displayed when the field is set to "0".
- This notification setting is not applicable to perpetual licenses.
- The alert banner is color coded as follows:
    - ♦ Gray: The license expires in more than a month.
    - ♦ Orange: The license expires in less than a month but more than a week.
    - ♦ Red: The license expires in less than a week.

- ❑ **Save**: Saves system settings.
- ❑ **Clear**: Clears all the boxes.
- ❑ **Cancel**: Cancels the operation.

Application Settings

Use the Application Settings page to set your application default preferences. To access this page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **Application Settings** tab at the top of the page.

You can specify the following settings:

E-mail Settings

- ❑ **Connection Type**: Select either **HTTP** or **HTTPS** from the list.
- ❑ **Notification Sender**: Specify the e-mail address to appear in the **From** field of notification messages.
- ❑ **E-mail Server User**: Specify the user name that is used for connection to the e-mail server.
- ❑ **E-mail Server Password**: Specify the password that is used for connection to the e-mail server.

NOTES

If no credentials are required on customers email system, then **E-mail Server User** and **E-mail Server Password** fields can be disabled by selecting the **Not Required** check box.

- ❑ **E-mail Server Host**: Specify the name of the e-mail server used.
- ❑ **E-mail Server Port**: Specify the port of the e-mail server.
- ❑ **Use SMTPS**: Select this check box if you want to use SMTPS.
- ❑ **Test Email**: Click the button to test email settings.
- ❑ **Send notification to system administrators when module terminated unexpectedly:** Select this check box if you want that admins to receive notification when the module terminates unexpectedly.
- ❑ **Send notification to system administrators before license expiration:** Selecting this check box will notify system administrators with defined email addresses that the instance license expires in N days (as determined by the **Show alert before license expiration** setting in the **System Preferences** tab). The notification will be sent once per day.

NOTES

A notification email will only be sent if the SMTP and email settings are correct (i.e., the email test is OK).

This check box is disabled by default.

Security Settings

- ❑ Permission Control

- **Do not include Global option on Rights tab:** A new "All Users Group" will be created automatically. This new user group will include all existing users.

> **NOTES**
>
> Rights may be lost if the "All Users Group" is deleted.

   o   Only allow Automator Users to assign Rights to other users in their User Groups
- Include Global option on Rights tabs, for assignment of permissions to all users
   o   **Automatically assign Global rights on new objects saved in the Server Library:** Global rights are automatically assigned to new objects only in the Server Library. They will not apply for processes.
- ❑ **Login attempts limit on Administrator**: Specify the maximum number of attempts to log in using the wrong user name or password, on MSAdmin.
- ❑ **Login attempts limit on RMS**: Specify the maximum number of attempts to log in using the wrong user name or password on RMS.
- ❑ **Save**: Saves application settings.
- ❑ **Clear**: Clears all the boxes.
- ❑ **Cancel**: Cancels the operation.

About Information

To access the **About Information** page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **About Information** tab.

The **About Information** tab allows you to specify product and company information, which will be displayed in the **About** dialog box.

The **About Information** page displays the following text fields to be filled:

- ❑ **Company**: Specify the company name.
- ❑ **Phone**: Specify the phone number.
- ❑ **Fax**: Specify the fax number.
- ❑ **Mail**: Specify the e-mail address.
- ❑ **Our Site**: Specify the website.
- ❑ **Technical Support**: Specify the e-mail or website of technical support.
- ❑ **Support Form**: Specify the e-mail address or website, containing the support form to be filled out by the customer.
- ❑ **Save**: Saves system settings.
- ❑ **Clear**: Clears all the boxes.
- ❑ **Cancel**: Cancels the operation.

System Defaults

Use the **System Defaults** page to set your system default preferences. To access this page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **System Defaults** tab at the top of the page.

System defaults allow to specify values that will be used for the following parameters by default:

❑ **Default Locale**: From this list select a default locale for the Web Portal application. This locale will be displayed on the Login page and for all newly created users.

RMS System Defaults

❑ **Default View**: Select the name of the view to show initially.

❑ **Delete Models**: Select to remove source model after user session ends.

❑ **Delete Reports**: Select to remove source report after user session ends.

❑ **Delete Templates**: Select to remove source template after user session ends.

❑ **Server-side XML/XSL transformation**: Select to use server XML/XSL conversion.

❑ **Enable formatting after XML/XSL transformation**: Select to enable formatting for templates after XML/XSL conversion.

❑ **Default Server Library Folder**: type in the name of a [Server Library Folder](#) to make its models appear in the **Selected Models** pane on RMS **My Home page** by default.

❑ **Available Allowed Views**: The text box displays all available allowed data views that can be assigned for a particular user on RMS. You can shift the required data views into **Assigned Allowed Views** by clicking on them or dragging them. Use the **Add All** link to add all available allowed data views to the **Assigned Allowed Views** text box.

❑ **Assigned Allowed Views**: The text box displays assigned allowed data views available for a particular user on RMS client. You can delete separate items in the view list by clicking on them. Use the **Remove All** link to clear the **Assigned Allowed Views** text box.

❑ **Save**: Saves system default settings.

❑ **Clear**: Clears all the boxes.

❑ **Cancel**: Cancels the operation.

❑ **Reset:** Resets all settings to default values.

New User Defaults

The **New User Defaults** settings page define values that will be available for a new user by default. To access this page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **New User Defaults** tab at the top of the page.

The following settings can be customized for a new user:

SETTING	DESCRIPTION
Excel Output	**Use XLSX Excel spreadsheet format.** Select this check box to use the XLSX format for Excel output. **Note**: This format requires Office 2007 installed on the client computer **Request customize dialog**. Select this check box to customize properties before data export.
Report View	**Count pages** The maximum number of documents that can be displayed on the

SETTING	DESCRIPTION
	Report View page at a time.
	Show greenbar
	Select this check box to enable alternate row highlighting when viewing report.
Dynamic View	**Count table rows**
	The maximum number of rows that can be displayed on the Dynamic View page.
Data/Summary View	**Count table rows**
	Specify the maximum number of rows that can be displayed on the Data View page.
	Count summary rows
	Specify the maximum number of rows that can be displayed on the Summary View page.
	Apply the style from the model
	Select this check box to apply the style from the model to the View page.
	Apply data formatting from model
	Select this check box to apply data formatting from the model to the View page.
CSV Output	**Column Separator**
	Specify the delimiter for CSV export from RMSClient and MSClient
	Apply delimiter from model
	Select this check box to apply the delimiter from the model.
	Comma
	Select this button to use a comma as the delimiter for the CSV export.
	Semicolon
	Select this button to use a semicolon as the delimiter for the CSV export.
	Tab
	Select this button to use a tab as the delimiter for the CSV export.
	Pipe
	Select this button to use a pipe as the delimiter for the CSV export.
	Other
	Select this button to specify a preferred delimiter.
Locale Settings	**Date Format**

SETTING	DESCRIPTION
	Specify a date format for your searches.The following options are available: *mm/dd/yyy* or *dd/mm/yyy*.
	Decimal Separator
	Select one of the proposed decimal separators: comma or period.
	Group Separator
	Select one of the proposed group separators: comma, space or period
RMS Home Page Settings	**Count home lists items:** Default count of items on one page in Selected Reports, Selected Models, Selected Templates, and Model to Template Mappings Lists on My Home.
	Display report list: Select to display report list at RMS Home page
	Display model list: Select to display model list at RMS Home page
	Display template list: Select to display template list at RMS Home page
	Display model to template mapping list: Select to display template mapping list at RMS Home page
	Display news list: Select to display news list at RMS Home page
Groups and Roles	**Available User Groups:** Lists available user groups to be assigned to new user.
	Available Roles: Lists available roles to be assigned to new user.
	Once selected, the user groups and roles assigned to a new user are listed in the Selected User Groups and Selected Roles panes, respectively.

❑ **Save**: Saves new user default settings.
❑ **Clear**: Clears all the boxes.
❑ **Cancel**: Cancels the operation.

Global User Settings

Use the Global User Settings page to set your global settings. To access this page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **Global User Settings** tab at the top of the page.

The **Global User Settings** page contains the following settings:

❑ **Maximum allowed report size (Kb)**: Enter the maximum report size in kilobytes.

❑ **Maximum allowed report size for PRF Export (Kb)**: Enter the maximum report size for PRF Export in kilobytes.

❑ **Count of Items Per Page**: Define the number of items per page. The lists of Monarch Server Administrator are split into several pages. Select a value from the list. The default value is set to 10.

❑ **Maximum exported CSV file size (rows)**: Enter the maximum exported CSV file size in kilobytes.

❑ **Maximum exported PDF file size (rows)**: Enter the maximum exported PDF file size in kilobytes.

❑ **Maximum exported PDF pages**: Enter the maximum number of exported PDF pages.

❑ **Data View asynchronous loading limit (rows)**: Number of rows set as a loading limit to be displayed as a result of exporting. The minimum value is 1000, the maximum value is 1000000 (one million), the default value is set to 5000.

  If during report exporting number of Data View rows is less that the limit, all data will be exported immediately. If number of Data View rows exceeds the limit, export will be stopped on reaching the limit and the already exported data will be available for viewing. The rest of data will be exported in an asynchronous way.

  The given feature allows you to speed up data exporting that are loaded within the defined limit.

After you made your changes

❑ To save changes to global user settings, click the **Save** button.

❑ To reset the changes you just made, click the **Clear** button.

❑ To cancel the operation without changes, click the **Cancel** button.

PDF Default Print Settings

Use the PDF Default Print Settings page to set your default settings for printing PDF files. To access this page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **PDF Default Print Settings** tab at the top of the page.

The **PDF Default Print Settings** page contains:

❑ **PDF - Table Font Name**: Select the font name from the list.

❑ **PDF - Report Font Name**: Select the font name from the list.

❑ **PDF - Font Size**: Select any PDF font size from the list.

❑ **PDF - Break Page Every:** Enter the number of rows. Zero value — no page break.

❑ **PDF - Break Page Every:** Enter the number of pages. Zero value — no page break.

❑ **PDF - Lines Spacing:** Select the value from the list.

❑ **PDF - Readahead:** Specify the number of text lines to sample in order to determine paper type and orientation of PDF.

❑ **PDF - Portrait Limit**: Specify the maximum number of characters per line for portrait paper orientation.

❑ **PDF - Landscape Limit**: Specify the maximum number of characters per line for landscape paper orientation.

❑ **PDF - Left Margin**: Specify the left margin size for PDF printing (in inches).

❑ **PDF - Right Margin**: Specify the right margin size for PDF printing (in inches).

❑ **PDF - Top Margin**: Specify the top margin size for PDF printing (in inches).

❑ **PDF - Bottom Margin**: Specify the bottom margin size for PDF printing (in inches).

❑ **Save**: Saves the settings.

❑ **Clear**: Clears all the boxes.

❑ **Cancel**: Cancels the settings.

RMS Settings

Use this page to set RMS settings. To access this page, on the Navigation Tree, click **System Settings**, select **System Preferences**, and click the **RMS Settings** tab at the top of the page.

RMS Settings

SETTING	DESCRIPTION
RMS Settings	**End session redirect url**: The URL to redirect users in case of end of session.
Digital Signature Settings	**Certificate**: Certificate for Excel projects. **Certificate friendly name**: Certificate friendly name for Excel exports. **Enable digital signature**: If it is selected and Certificate is not empty, Certificate will be available for Excel exports, else — Certificate will not be available even if Certificate value is defined. **Force digital signature**: Force all exports to XLSX with signature. This entry is used only if Certificate is defined.
Navigation Settings	**Show About link**: Select to show About Dialog in RMS Client. **Show Preferences link**: Select to show Preferences Dialog in RMS Client. **Show Allow Xlsx Format**: Select to show Excel format checkbox in RMS Client. **Show Home**: Select to show the My Home tab in RMS Client. **Show My Models**: Select to show the My Models tab in RMS Client.

RMS Home Page Settings

SETTING	DESCRIPTION
Home Page Text Font	The font for the customer text at the Home page.
Home Page Text Font Size	The font size for the customer text at the Home page.
Home Page Text Color	The color for the customer text at the Home page.
Home Page Graphic URL	Certificate friendly name for Excel exports.
Home Page Text	The customer text at the Home page.

RMS Security Settings

SETTING	DESCRIPTION
Hash algorithm	Hash algorithm that is used for checking checksum in the symmetric mode.. One of the following: SHA1, SHA256, SHA284, SHA512, MD5.
Signing digest algorithm	Hash algorithm that is used for getting digest for verifying signature. One of the following: SHA1, SHA256, SHA284, SHA512, MD5.
Key algorithm	Signature algorithm. Private and public key must be generated with this algorithm. One of the following: DSA, RSA.
Encryption method type	Checksum validation method. One of the following: Assymetryc, Symmetric.
Expiration time (seconds)	Expiration time of checksum in seconds.
Ignore checksum	If selected, checksum generation and passing as a parameter in the initial request is ignored. Otherwise, it is required. Disabling checksum may be useful for testing, demonstration and development purposes — before

	production stage.

HECM Settings

SETTING	DESCRIPTION
File Downloader Url	The URL to the MECM FileDownloader servlet.
File Downloader Block Size (kb)	The maximum number of bytes to read in this retrieval. For example, a block size of 1048576 means: read the first 1 MB of the file. In the event that the file is larger than the block size requested by the client, the servlet will return an HTTP Partial Content response code (206). The client should follow up with another request to retrieve the next chunk of the file.
File Downloader Connection Timeout	The timeout while attempting to connect to the MECM FileDownloader servlet after which the connection is terminated, and an error is produced.

❑ **Save**: Saves the settings.

❑ **Clear**: Clears all the boxes.

❑ **Cancel**: Cancels the settings.

THEME MANAGEMENT

You can specify color themes for Admin and Client applications on the **Theme Management** page.

To change the color theme

1. Click **System Settings** on the Navigation Tree, and select **Theme Management**.

2. Select

   • **Admin theme** from the list, select a theme for Admin application

   • **RMS Client theme** from the list, select a theme for RMS Client application

3. Click **Save**.

NOTES

For the changes to take effect, relogin is required.

NEWS

MSAdmin provides the News Message feature as a way to easily share information with other Monarch Server Report Mining Edition users. You can post news messages on the All News and Global News pages. After posting a message, you specify which Monarch Server Report Mining Edition users you want the message to be visible to. The users you specify will be able to view the message on the News page within Client.

There are three types of news:

❑ **All News**: These are all the news used in the system. They are available to user groups or users having the appropriate rights. For more information refer to All News.

❑ **Expired News**: These are news that have expired. For details, see Expired News.

❑ **Global News**: Include both all news and expired news. They are available to all users. For more information refer to Global News.

ALL NEWS

All news messages can be viewed by Monarch Server Report Mining Edition users or user groups having the appropriate rights.

To access the **All News** page, click **News** on the Navigation Tree, and select **News Management**.

Use the All News page to add, edit or delete a news message.

The All News page contains:

❑ **Search**: Type a message content (or a part of it) in this box and press ENTER. The filter will be applied to the list of news messages, and only messages containing the specified characters will be displayed.

❑ **News date**: Displays the dates when news messages were posted.

❑ **Content**: Displays the news messages content.

❑ **Expiration Date**: Displays the expiration dates of news messages. Expired dates are highlighted in red.

❑ ➕ : Click to add a news message.

❑ ✎ : Click to edit a message.

> **NOTES**
>
> You can also open a message for editing by clicking its name on the list.

❑ ✖ : Click to delete a message.

❑ ✖ : Click to delete all expired messages from the database.

EXPIRED NEWS

The **Expired News** page lists news messages, for which the expiration date has arrived or has passed.

To access the **Expired News** page, click **News** on the Navigation Tree, select **News Management**, and click the **Expired News** tab at the top of the page.

Use this page to add, edit or delete a news message.

The **Expired News** page contains:

❑ **Search**: Type a message content (or a part of it) in this box and press ENTER. The filter will be applied to the list of news messages, and only messages containing the specified characters will be displayed.

❑ **News date**: Displays the dates when news messages were posted.

❑ **Content**: Displays the news messages content.

❑ **Expiration Date**: Displays the expiration dates of news messages. Expired dates are highlighted in red.

❑ ✛ : Click to add a news message.

❑ ✎ : Click to edit a message.

> **NOTES**
>
> You can also open a message for editing by clicking its name on the list.

❑ ✖ : Click to delete a message.

❑ ✖ : Click to delete all expired messages from the database.

GLOBAL NEWS

The **Global News** page lists all global news messages. Global news messages can be viewed by all Monarch Server Report Mining Edition users. To access the **Global News** page, click **News** on the Navigation Tree, select **News Management**, and click the **Global News** tab at the top of the page.

Use this page to add, edit or delete a news message.

The **Global News** page contains:

❑ **Search**: Type a message content (or a part of it) in this box and press ENTER. The filter will be applied to the list of news messages, and only messages containing the specified characters will be displayed.

❑ **News date**: Displays the dates when news messages were posted.

❑ **Content**: Displays the news messages content.

❑ **Expiration Date**: Displays the expiration dates of news messages. Expired dates are highlighted in red.

❑ ✛ : Click to add a news message.

❑ ✎ : Click to edit a message.

> **NOTES**

You can also open a message for editing by clicking its name on the list.

❑   ✖ : Click to delete a message.

❑   ✖ : Click to delete all expired messages from the database.

ADDING A NEWS MESSAGE

To add a news message

1. On the Navigation Tree, click **News**, and select **News Management**. The **All News** tab is displayed by default.

2. Select the **Expired News** tab, if you want to add an expired message.

3. Select the **Global News** tab, if you want to add a global message.

4. Click ✚ to open the News Management page.
   The News Management page contains the following items:

   • **News Date**: The current date is displayed by default. You can click the 🗓 icon and select another date.

   • **Expiration Date**: Click the 🗓 icon to specify the expiration date of the news.

   • **Is Global**: Select this check box, if you want to make the message available to all users.

   > **NOTES**
   >
   > If you leave this check box cleared, you will be able to grant access rights to certain users, user groups or roles. The **Rights** tab will become available after you save the new message and open it for editing.

   • **News Text**: Type the text of your news message.

   • **Save**: Saves a new message.

   • **Clear**: Clears all the boxes.

   • **Cancel**: Cancels the operation.

5. Fill in the boxes of the page, and click **Save**. The system saves the new message to the database and displays the updated News Management page, if the operation is completed successfully.

EDITING A NEWS MESSAGE

To edit a news message

1. On the Navigation Tree, click **News**, and select **News Management**. The **All News** tab is displayed by default.

2. Select the **Expired News** tab, if you want to edit an expired message.

3. Select the **Global News** tab, if you want to edit a global message.

4. Click the name of the message you want to edit or click anywhere on its row, and then click ✎.

5. Make the necessary changes. For details about how to change the items refer to Adding a News Message.

6. To grant access rights, select the **Rights** tab at the top of the page.

NOTES

This tab is available, if you leave the **Is Global** check box cleared while creating a new message.

7. Expand the hidden sections, by clicking the **User Groups**, **Roles**, or **Users** heading. To select the roles, groups or users that you want to have rights to view the news, drag them from the left pane to the right pane.

8. Make the necessary changes and click **Save**. The system saves the modified message to the database.

DELETING A NEWS MESSAGE

To delete a news message

1. On the Navigation Tree, click **News**, and select **News Management**. The **All News** tab is displayed by default.

2. Select the **Expired News** tab, if you want to delete an expired message.
   or
   Select the **Global News** tab, if you want to delete a global message.

3. Click ✖ at the end of the row with the message you want to delete. A dialog box appears.

4. Click **Delete** to delete the message from the list.

SYSTEM REPORTS

Monarch Server Report Mining Edition Administrator provides an easy means of generating system reports. The following types of system reports can be generated:

❑ Configuration reports provide information about the current configuration of various parts of the Monarch Server Report Mining Edition system, such as the existing roles, users, and so on.

❑ Transaction reports provide information about any actions that have occurred in the system, such as security, audit, and so on.

CONFIGURATION REPORTS

Configuration reports provide information about the current configuration of various parts of the Monarch Server Report Mining Edition system, such as the existing roles, users, and so on. You can generate the following types of configuration reports:

❑ Product License: Displays the product licensee, the product expiration date (if any), etc.

❑ Roles: Lists the existing roles and their assigned user groups and users.

❑ User Groups: Lists the existing user groups, their assigned users, and their privileges.

❑ Users: Lists the existing users, their e-mail addresses, and their locked privileges.

To generate configuration reports

1. On the Navigation Tree, click **System Reports**, and select **Configuration**. The Configuration Reports page appears.

2. On the Configuration Reports page, click the link that corresponds to the desired report type.

Product License Report

A Product License report is one of the configuration reports provided by Monarch Server Report Mining Edition. This report includes the following licensing information:

❑ Name of the product

❑ Product vendor

❑ Product copyright information

❑ License expiration date

❑ Customer name

❑ Customer address

❑ Product Components (for example, Report View, Chart, and so on)

❑ Product options (for example, maximum allowed connections, machine names, and so on)

To view and print a Product License configuration report

1. On the Navigation Tree, click **System Reports** and select **Configuration**.

2. Click the **Product License** link. The Product License configuration report is displayed.

3. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

NOTES

For information on how to convert a report to another format, see
Converting a report to another format.

Roles Report

A Roles report is one of the configuration reports provided by Monarch Server Report Mining Edition. This report includes all existing roles, and provides the following information about them:

❑ Names of roles

❑ Privileges assigned to roles

❑ User groups assigned to roles

❑ Users assigned to roles

To view and print a Roles configuration report

1. On the Navigation Tree, click **System Reports** and select **Configuration**.

2. Click the **Roles** link. The Roles report is displayed.

3. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

NOTES

For information on how to convert a report to another format, see
Converting a report to another format.

User Groups Report

A User Groups report is one of the configuration reports provided by Monarch Server Report Mining Edition. This report includes all existing user groups, and provides the following information about them:

❑ Names of user groups

❑ Privileges assigned to user groups

❑ Users assigned to user groups

To view and print a user groups configuration report

1. On the Navigation Tree, click **System Reports** and select **Configuration**.

2. Click the **User Groups** link. The User Groups report is displayed.

3. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

Users Report

A Users report is one of the configuration reports provided by Monarch Server Report Mining Edition. This report includes all existing users, and provides the following information about them:

❑ User names assigned to users

❑ Full (or actual) names of users

❑ Privileges granted to users

❑ E-mail addresses of users

To view and print a Users configuration report

1. On the Navigation Tree, click **System Reports** and select **Configuration**.

2. Click the **Users** link. The Users report is displayed.

3. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

TRANSACTION REPORTS

Transaction reports provide information about any actions that have occurred in the system, such as security, audit, and so on.

You can generate the following types of transaction reports:

❑ Security — Lists the time, user name, and log on/log off information.

- ❑ [Added Users](#) — Lists information about users add during the date range selected.

- ❑ [Deleted/Suspended Users](#) — Lists information about users who have been deleted or suspended.

- ❑ [Users Not Logged In](#) — Lists information users who have not logged in over a date range.

- ❑ [Dynamic Login Requests](#) — Lists information about dynamic login requests in RMS Client.

To view transaction reports

1. On the **Navigation Tree**, click **System Reports**, and select **Transaction**. The Transaction Reports page appears.
   The Transaction Reports page contains the following items:

   - **Events From To**: Specify the beginning and the end of the time interval, for which you want to remove events.

   - **Clear Log**: Click this button to remove all events that occurred during the time interval defined earlier.

   - **Transaction Reports**: Contains links to transaction reports of different types.

2. To generate a report, on the Transaction Reports page, click the link that corresponds to the desired report type.

Security Report

A Security Report is one of transaction reports provided by Monarch Server Report Mining Edition. This report provides the following information:

- ❑ Date and time the user(s) log on to and log off from the system

- ❑ Name(s) of the user(s) who logged on to and log off from the system

- ❑ Date and time the user(s) log on to the system with incorrect password

- ❑ Name(s) of the user(s) who logged on to the system with incorrect password

To view and print a Security transaction report

1. On the Navigation Tree, click **System Reports** and select **Transaction**.

2. Click the **Security** link. The Security Transaction Report page is displayed.

3. In the **From ... To** fields specify a time period, for which you want to view the security actions. Click 📅 to open the Calendar window, and select the date.

> **NOTES**
>
> If you do not provide a date or time period, all actions for the specified user(s) will be displayed.

4. From the **User** list, select a user, whose actions you want to include in the report. (To view security information for all users, select **All Users**.)

5. Click **View**. The Security transaction report is displayed.

6. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

> **NOTES**
>
> For information on how to convert a report to another format, see

Added Users Report

Added Users Report is one of transaction reports provided by Monarch Server Report Mining Edition. This report provides the following information:

❑   Internal User ID.

❑   User name.

❑   Date when a user was added.

To view and print an Added Users transaction report

1.   On the Navigation Tree, click **System Reports** and select **Transaction**.

2.   Click the **Added Users** link. The **Added Users** page is displayed.

3.   In the **From ... To** fields specify a time period, for which you want to view system actions. Click 🗓 to open the Calendar window, and select the date.

> **NOTES**
>
> The maximum number of days is 90.

4.   Click **View**. The Added Users Transaction Report is displayed.

5.   To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

> **NOTES**
>
> For information on how to convert a report to another format, see
> [Converting a report to another format](#).

Deleted/Suspended Users Report

A Deleted/Suspended Users Report is one of transaction reports provided by Monarch Server Report Mining Edition. This report provides the following information:

❑   User ID.

❑   User name.

❑   Date when a user was locked or suspended.

To view and print a Deleted/Suspended Users transaction report

1.   On the Navigation Tree, click **System Reports** and select **Transaction**.

2. Click the **Deleted/Suspended Users** link. The Deleted/Suspended Users page is displayed.

3. In the **From ... To** fields specify a time period, for which you want to view system actions. Click 📅 to open the Calendar window, and select the date.

4. Click **View**. The Deleted/Suspended Users Transaction Report is displayed.

5. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

> **NOTES**
>
> For information on how to convert a report to another format, see
> Converting a report to another format.

Users Not Logged In Report

A Users Not Logged In Report is one of transaction reports provided by Monarch Server Report Mining Edition. This report provides the following information:

❑   Internal User ID.

❑   User name.

❑   Last logon date.

To view and print a Users Not Logged In transaction report

1. On the Navigation Tree, click **System Reports** and select **Transaction**.

2. Click the **Users Not Logged In** link. The Users Not Logged In page is displayed.

3. In the **From ... To** fields specify a time period, for which you want to view logon actions. Click 📅 to open the Calendar window, and select the date.

4. Click **View**. The Users Not Logged In Transaction Report is displayed.

5. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

> **NOTES**
>
> For information on how to convert a report to another format, see
> Converting a report to another format.

Dynamic Login Requests Report

A Dynamic Login Requests Report is one of transaction reports provided by Monarch Server Report Mining Edition. This report provides the following information on the RMS Client login:

❑   Report Paths.

❑   Model Paths.

❑   Template Paths.

❑ Templates to Models.

❑ Allowed Views.

❑ Default View.

❑ Admin Mode.

❑ Definition Group.

❑ Dynamic Filter.

❑ Locale.

❑ Export To.

To view and print a Dynamic Login Requests transaction report

1. On the Navigation Tree, click **System Reports** and select **Transaction**.

2. Click the **Dynamic Login Requests** link. The Dynamic Login Requests page is displayed.

3. In the **From ... To** fields specify a time period, for which you want to view logon actions. Click 🗓 to open the Calendar window, and select the date.

4. In the **User** drop-down list select the reported user.

5. Click **View**. The Dynamic Login Requests transaction report is displayed.

6. To print the report, click the 🖨 icon at the top of the page, then click **OK** in the **Print** dialog box.

NOTES

For information on how to convert a report to another format, see
Converting a report to another format.

CONVERTING A REPORT TO ANOTHER FORMAT

To convert a report to another format

❑ Select required format from the **Export to the selected format** list at the top of the page and click **Export**. Formats available:

- Acrobat (PDF) file

- CSV (comma delimited)

- Excel

- Rich Text Format

- TIFF file

- Web Archive

ACTIVE USERS

Monarch Server Report Mining Edition provides the possibility to monitor active users in the system.

To access the Active Users Report, on the **Navigation Tree**, click **System Reports**, and select **Active Users**. The list displays the following information:

❑ User name

❑ Privileges

❑ Creation time

❑ Module name

❑ Terminate

Click the icon in the **Terminate** column to close the current session for the selected active user. The **Terminate User Session** dialog box will pop up with the the following question: *Terminate selected User Session?*

Click **Delete** to confirm your choice or **Cancel** to remain the session.

TECHNICAL SUPPORT

Software Support Policy

For details about the latest product versions, product development, software releases, and maintenance and support policy, visit http://www.datawatch.com/software-support-policy/.

Before Contacting Technical Support

You have access to a variety of resources that can help you address any questions or concerns about Monarch Server. Before you contact Technical Support, do the following:

❑ Refer to the Monarch Server documentation. You may find the answer to your question in the help file.

❑ Check your configuration and resources. In some cases, a simple restart can solve the problem.

❑ Check your license, especially when you exceed the number of CPU cores allowed by your license, in which case the following message appears in the login page:

"The license for Monarch Server is used improperly. Please contact your Altair sales representative for extended options."
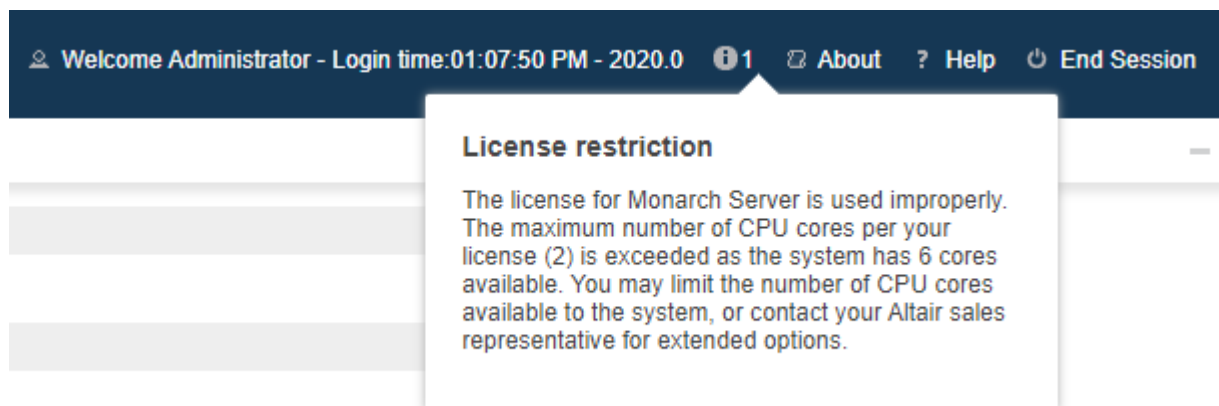
How to Receive Help

❑ Access the Altair Support portal.

• Click **REGISTER NOW** to sign up and gain access to the Altair Support portal.

• Click **LOGIN HERE** if you already have access.

❑ Email Altair Support at support@datawatch.com.

❑ Call Altair Support.

US and Canada

Phone: +1-800-988-4739

Phone: +1-978-275-8350

Hours: Monday - Friday, 8:30am - 6:00pm Eastern (EST/EDT)

Europe, Middle East, Africa

Phone: +44 (0) 8081 892481

Hours: Monday - Friday, 8:30am - 6:00pm London (GMT/BST)

NOTES

Provide as much information as possible, including the following:

- Product name and version number
- Registration number
- Operating system and version number
- Exact error messages (where applicable)
- A description of the problem, including the steps necessary to reproduce it, and how you attempted to solve it
- Your contact information

What to Expect

We'll answer your call in the order we receive it. Here's what you can expect:

❑ If all support specialists are engaged with other customers, you will have the option to continue holding or to leave a message.

❑ The specifics of your call are logged into our call tracking system and queued for the appropriate technical support specialist.

❑ We will return your call as soon as a support specialist becomes available.

Faxed requests are collected periodically throughout the day and then assigned to available support specialists.

CONTACT US

GET IN TOUCH

We'd love to hear from you. Here's how you can reach us.

SALES CONTACT INFORMATION

US: + 1.800.445.3311
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Sales Email

US: sales@datawatch.com
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SUPPORT CONTACT INFORMATION

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