ALTAIR

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

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INTRODUCTION

Welcome to Monarch Server (MS), Altair Engineering Inc.'s latest Reporting solution.

Monarch Server is the smart business intelligence software that gives you the power to keep the data and lose the paper. That's because Monarch Server powerful report-mining technology can unlock data buried in reports and documents and turn it into data that you can use now.

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:

- ❑ Monarch Server (MS)
- ❑ MS Product Components
- ❑ MSAdmin Tasks
- ❑ RMS Product Components
- ❑ Launching MSAdmin
- ❑ Navigation Tree
- ❑ Functional buttons
- ❑ Page Navigation
- ❑ Using the Calendar
- ❑ Relational Operators
- ❑ Boolean Operators

ABOUT MONARCH SERVER (MS)

Monarch is a data access tool that lets you view, print, extract and analyze data from existing computer reports. Any report used in your organization can be accessed via Monarch. Whenever a computer produces a report, it creates a report file that contains all the characters and control codes that are sent to the printer to produce the actual printout.

Monarch reads these report files, but instead of producing a hardcopy printout with words and numbers frozen on the page, Monarch creates a softcopy of the report on screen, with live data you can work with.

In most organizations, Monarch Server users access report files across a network or via terminal emulation software. Companies already collect, process, and interpret large amounts of data as a matter of course, which is generated in standard business reports. A hidden treasure-trove of analytical information exists in the various reports that are generated every day, week, month, and year. Managers can use these reports (without fear of altering the actual corporate data) as a starting point for the next level of analysis to help them evaluate and respond to business situations.

Analyzing data buried in reports is called report mining. Monarch Server uses Monarch's powerful report-mining technology to unlock the data buried in report files. Mining provides executive- and mid-level managers with the information and tools to support the decision-making process. In addition, report data can be exported to other software programs, such as spreadsheets and forecasting software, for further analysis.

At the heart of Monarch Server is a [report warehouse](#) subsystem for efficient storing and managing large volumes of corporate reports. Reports produced in any host environment can be brought into Monarch Server. These reports are automatically identified, indexed, compressed, and stored in the warehouse system. Monarch Server uses an industry-standard SQL database to manage storage and provide fast, efficient access to report data.

Monarch Server allows end users to retrieve information from reports, search for data in several reports simultaneously, and manipulate data for further analysis. This online system makes report data available more quickly, economically, and effectively than is possible with traditional hardcopy reports.

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.

MONARCH SERVER PRODUCT COMPONENTS

The MSAdmin is a part of the Monarch Server system, which consists of these major components:

❑ **SQL database**. Monarch Server 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.

❑ **Monarch Server Administrator** (MSAdmin). It is used by the system administrator to define the parameters of the system. MSAdmin identifies where reports are to be found, how they are to be processed into electronic documents, and where the results (that is, documents) will be physically stored. It calls Monarch to set up models for indexing and extracting data from documents. MSAdmin provides capabilities for enforcing system security, establishing user rights and privileges, and handling maintenance issues.

❑ **Monarch Server Client** (MSClient). It contains the functionality necessary for retrieving documents. It allows users to query the report warehouse in a number of ways to find the documents that they are looking for. Once found, these documents are launched into Monarch with the appropriate model file for viewing and analysis. MSClient is also used to process reports into documents. Using the parameters established in MSAdmin, new reports are recognized, indexed, broken into documents, and stored away, creating a warehouse of documents and indexes.

OVERVIEW OF MSADMIN TASKS

Monarch Server provides automatic indexing, instant retrieval of selected pages, and comprehensive security features.

In order to understand how Monarch Server works, you need to understand its terminology. Although the terms are familiar, they have specific meanings in the context of Monarch Server.

In Monarch Server, reports are the electronic versions of the reports generated by your company's reporting systems. They have a consistent, structured layout and generally are stored as one file. For instance, an Employee Insurance Report is a report that might be stored in a single file called EMPINSUR.TXT.

A document is a section of a Monarch Server report that can be logically independent from other sections of the report. The Employee Insurance Report might be sorted by office, with a subtotal for each department. Each section of the report that represents a regional department is logically independent of the others. Breaking the report into smaller logical documents allows users to retrieve only those pages of the report that they want.

A keyword type is defined when you create a Monarch model, specified by a Monarch model file. In other words, when creating a model, one or several keyword types are defined. A keyword type is a field within a model that identifies the document. Document retrievals are based upon these fields of information.

A document type may have several keyword types associated with it. These keyword types are set up by a system administrator and are made available to users automatically. While a keyword type is a general category, a keyword is the specific value of a keyword type. For example, 'Q197-4112' would be a keyword for the keyword type of Purchase Order Number. The keyword type of Social Security Number would contain the keywords '011-39-0778' and '287-33-1111'.

An index field is actually a keyword type but kept in the database. When Monarch begins processing reports (filing), the system matches index fields with corresponding keyword types. All values of keywords for a document are saved in the database and are associated with index fields. Then a user can begin searching for documents, setting appropriate values of index fields.

An index field points to the start of the document, with which the given keyword is to be associated. Monarch Server uses index fields to locate and retrieve documents according to keywords. For example, when you type in the keyword '011-39-0778' for Social Security Number, the index is used to locate documents for the individual with that social security number.

The following scheme represents the main relationships between the parts of the system at the conceptual level.
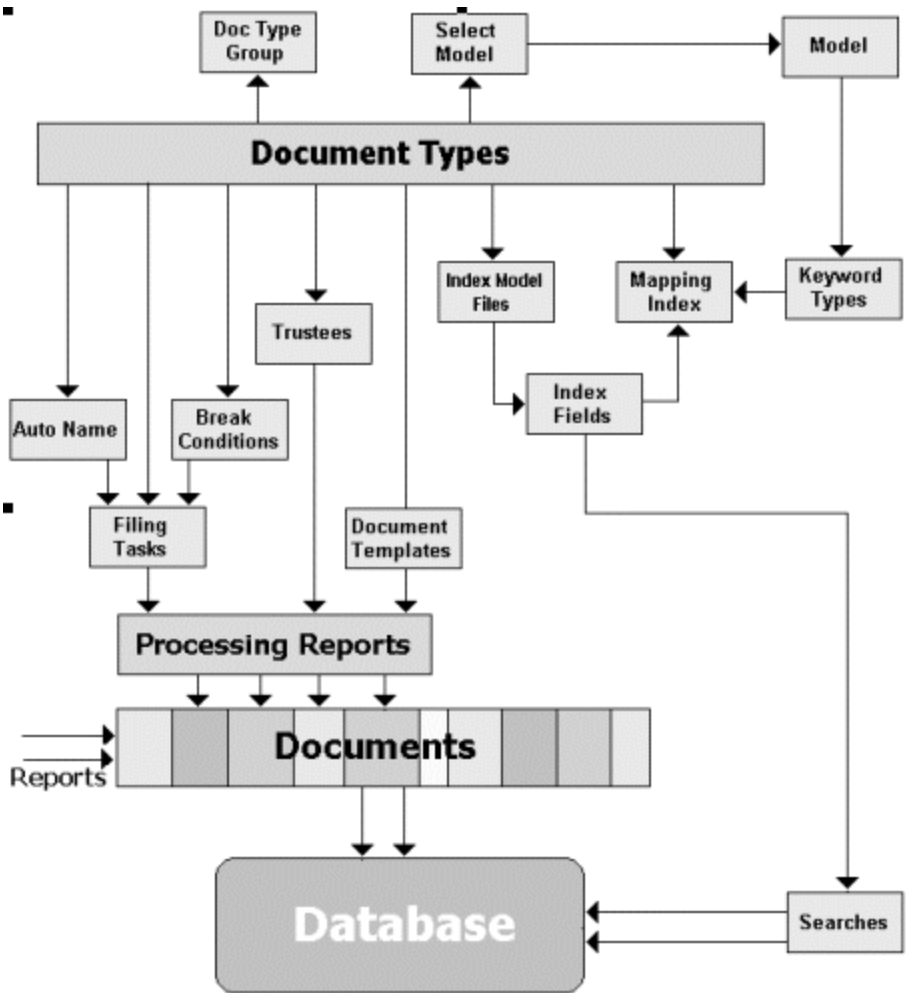
Here the Document Type is a base concept, which defines how the system functions as a whole. You may acquaint yourself with it further by reading the section titled Document Types. Document types compose a Document Type Group, described in the section titled Document Groups.

When you create or edit a document type, the system allows you:

❑ To select a model from the list of available models. Before you can select a model, you need to define it with the help of the Model page, described in the section titled Adding a Model. Each model described by the mod- or xmod-type files defines the keyword types.

❑ To define the auto-name scheme using the AutoName page, which automatically assigns document names based on any combination of indexes and document identifiers. For more information, see Auto-naming documents.

❑ To define filing tasks, which begin to process the reports. For information on how to manage filing tasks see Filing Tasks.

❑ To set trustees (users) for documents in the system defined by their roles and a user group they belong to. For details refer to Rights and Privileges.

❑ To define document templates for documents extracted from the reports. On how to define document templates, see Templates.

❑ To select the index model files with the help of the Model page described in the section titled Adding a Model. These files define the index fields used to search for documents in the database.

❑ To bring index fields in accordance with keyword types with the help of the Document Type page. For more information, see Adding a Document Type.

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.

To initiate MSAdmin

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 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 Monarch 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 <u>launching MSAdmin</u>, 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.

❑ **Content System**

- **Storage**

  ♦ **Storage Volumes**: This link allows you to manage storage volumes. For more information, see Storage Volumes.

  ♦ **Storage Groups**: This link allows you to manage storage groups. For more information, see Storage Groups.

- **Maintenance**

  ♦ **Maintenance Tasks**: This link allows you to manage maintenance tasks. For more information, see Maintenance Tasks.

  ♦ **Log Clearance Tasks**: This link allows you to manage log clearance tasks. For more information, see Log Clearance Tasks.

  ♦ **Maintenance Processes**: This link allows you to manage processes. For more information, see Maintenance Processes.

  ♦ **Full Text Search**: This link allows you to search for reports containing the specified text.

- **Document Management**

  ♦ **Index Fields**: This link allows you to manage indexes. For more information, see Index Fields.

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

  ♦ **Document Types**: This link allows you to manage document types. For more information, see Document Types.

  ♦ **Filing Tasks**: This link allows you to manage filing tasks. For more information, see Filing Tasks.

  ♦ **Filing Processes**: This link allows you to manage filing processes. For more information, see Filing Processes.

- **Document Retrieval**

  ♦ **Search Groups**: This link allows you to manage search groups. For more information, see Search Groups.

  ♦ **Searches**: This link allows you to manage searches. For more information, see Searches.

  ♦ **Search Notifications**: This link allows you to manage search notifications. For more information, see Search Notifications.

  ♦ **System Notifications**: This link allows you to manage system notifications. For more information, see System Notifications.

  ♦ **Filing Notifications**: This link allows you to manage filing notifications. For more information, see Filing Notifications.

  ♦ **Offline Tasks**: This link allows you to manage offline tasks. For more information, see Offline Tasks.

  ♦ **Offline Processes**: This link allows you to manage offline processes. For more information, see Offline Processes.

- **Transfer**

  - **Export**: This link allows you to export document types and document-related items. For more information, see Export.

  - **Import**: This link allows you to import document types and document-related items. For more information, see Import.

❑ **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.

- **Virtual Paths**: This link allows you to manage virtual paths. For more information, see Virtual Paths.

- **Locale Management**: This link allows you to manage locales. For more information, see Managing Locales.

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

- **Preprocess Converters**: This link allows you to convert files of foreign, non-standard formats for processing them by the system. For more information, see Preprocess Converters.

- **Bulk Schedules Edits**: This link allows you to apply bulk editing of schedules. For more information, see Bulk Schedules Edits.

❑ **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.

- **Annotations**: This link allows you to generate annotation reports. For more information, see Annotation Reports.

- **Removed Reports**: This link allows you to view the list of removed reports. For more information, see Removed Reports.
- **Activity Monitor**: This link allows you to monitor the filing and maintenance activities over a period of time. For more information, see Activity Monitor.
- **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 Monarch 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:
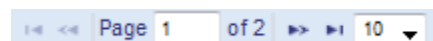
To see the remaining 10 users, you would have to click one of the page navigation icons.

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 ❙◀ .
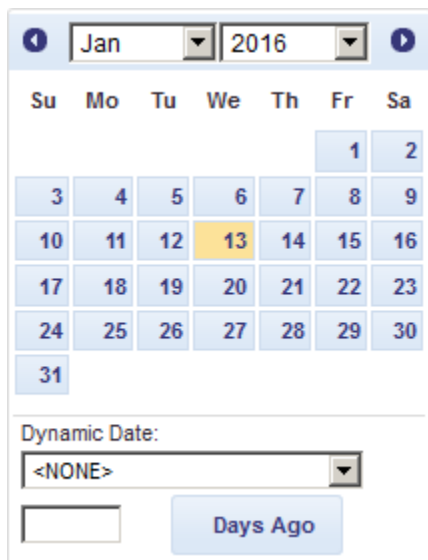
USING THE CALENDAR

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 ➡.

RELATIONAL OPERATORS

Relational operators let you specify the relationship between an index field and an index value in your search criteria.

The relational operators are located in the **Operator** drop-down list, on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button under the **Search Criteria** heading.

The following relational operators are available:

- ❑ Equal to (=)
- ❑ Not equal to (<>)
- ❑ Less than (<)
- ❑ Greater than (>)
- ❑ Less than or equal to (<=)
- ❑ Greater than or equal to (>=)

When using relational operators in conjunction with Boolean operators, make sure that your search criteria make sense. For example, if your search criterion is **Employee Name = John Smith** and you add the search phrase **Employee Name = Jane Doe** to it, you cannot link the two phrases with the **AND** operator, because none of the **Employee Name** index fields would contain both **John Smith** and **Jane Doe** index values. (The **AND** operator specifies that *all* search phrases linked by it must be true.) To use these two search phrases in your search criteria, you would have to link them with the **OR** operator.

Equal to (=) Operator

When configuring a search, the equal to (=) operator is one of the relational operators you can use to specify the relationship between an index field and an index value in your search criteria.

Though the **equal to** (=) operator is the default relational operator used, you can select any of five other relational operators from the **Operator** drop-down list, on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button, under the **Search Criteria** heading.

Use the **equal to** (=) operator to retrieve only those documents that contain, in the specified index field, the index value contained in the search phrase.

Examples:

Customer Name = **Bob's Records** retrieves all documents with an index value of **Bob's Records** in the **Customer Name** index field.

Ship Date = **01/31/2001** retrieves all the documents with an index value of **01/31/2001** in the **Ship Date** index field.

Not Equal to (<>) Operator

When configuring a search, the **not equal to** (<>) operator is one of the relational operators that lets you specify the relationship between an index field and an index value in your search criteria.

The **not equal to** (<>) operator is located in the **Operator** drop-down list, on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button, under the **Search Criteria** heading.

Use the **not equal to** (<>) operator to retrieve only those documents that do not contain, in the specified index field, the same index value as the one in the search phrase.

Examples:

Customer Name <> **Betty's Music Store** retrieves all documents with index values other than **Betty's Music Store** in the **Customer Name** index field.

Ship Date <> **01/31/2001** retrieves all documents with index values other than **01/31/2001** in the **Ship Date** index field.

Less Than (<) Operator

When configuring a search, the **less than** (<) operator is one of the relational operators you can use to specify the relationship between an index field and an index value in your search criteria.

The **less than** (<) operator is located in the **Operator** drop-down list, on the Search page.

NOTES

Use the **less than** (<) operator in a search to retrieve only those documents that contain, in the specified index field, an index value that is less than the one in the search phrase.

Examples:

Ship Date < **06/01/2001** retrieves all documents with an index value of **05/31/2001** or earlier in the **Ship Date** index field.

Invoice Amount < **20000** retrieves all documents with an index value of **19,999.99** or less in the **Invoice Amount** index field.

Greater Than (>) Operator

When configuring a search, the **greater than** (>) operator is one of the relational operators you can use to specify the relationship between an index field and an index value in your search criteria.

The **greater than** (>) operator is located in the **Operator** drop-down list, on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button, under the **Search Criteria** heading.

Use the **greater than** (>) operator to retrieve only those documents that contain, in the specified index field, an index value that is greater than the one in the search phrase.

Examples:

Ship Date > **06/01/2001** retrieves all documents with an index value of **06/02/2001** or later in the **Ship Date** index field.

Invoice Amount > **20000** retrieves all documents with an index value of **20,000.01** or more in the **Invoice Amount** index field.

Less Than or Equal to (<=) Operator

When configuring a search, the **less than or equal to** (<=) operator is one of the relational operators you can use to specify the relationship between an index field and an index value in your search criteria.

The **less than or equal to** (<=) operator is located in the **Operator** drop-down list, on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button, under the **Search Criteria** heading.

Use the **less than or equal to** (<=) operator to retrieve only those documents that contain, in the specified index field, an index value that is less than or equal to the one in the search phrase.

Examples:

Ship Date <= **07/01/2001** retrieves all documents with an index value of **07/01/2001** or earlier in the **Ship Date** index field.

Invoice Amount <= **15000** retrieves all documents with an index value of **15,000** or less in the **Invoice Amount** index field.

Greater Than or Equal to (>=) Operator

When configuring a search, the **greater than or equal to** (>=) operator is one of the relational operators you can use to specify the relationship between an index field and an index value in your search criteria.

The **greater than or equal to** (>=) operator is located in the **Operator** drop-down list, on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button, under the **Search Criteria** heading.

Use the **greater than or equal to** (>=) operator to retrieve only those documents that contain, in the specified index field, an index value that is greater than or equal to the one in the search phrase.

Examples:

Ship Date >= **07/01/2001** retrieves all documents with an index value of **07/01/2001** or later in the **Ship Date** index field.

Invoice Amount >= **15000** retrieves all documents with an index value of **15,000** or more in the **Invoice Amount** index field.

Boolean Operators

Boolean operators enable you to define searches that include more than one search phrase. Searches made up of two or more search phrases can include multiple index fields and index values.

The Boolean operators are located on the Search page.

NOTES

This list is not visible, until you select a document group and document type, and click the **Add condition** button under the **Search Criteria** heading.

Click the drop-down arrow to select a Boolean operator from the list.

NOTES

While the **AND** operator can be used to link search criteria containing different index fields, the **OR** operator can only be used to link search criteria containing the same index field.

The following Boolean operators are available:

❑ **AND Operator**: The AND operator specifies that, in order for a document to be retrieved, all search phrases linked by it must be true. The search phrases linked with the AND operator can contain different index fields.

Examples:

Ship Date > 01/31/2001 AND Ship Date < 03/02/2001 — This retrieves all documents with ship dates from February 1, 2001 through March 1, 2001.

Customer name = Betty's Music Store AND Ship Date = 01/31/2001 — This returns only documents for Betty's Music Store that have a ship date of January 31, 2001.

❑ **OR Operator**: Use the OR operator to configure a search, in which only one of the search phrases linked by it must be true for a document to be retrieved. The OR operator will also retrieve any documents that meet both or all of the search phrases. Note: The OR operator can only be used to link search criteria containing the same index field. For example, the search phrase Employee Name = John Smith OR Department = Accounting would not work because Employee Name and Department are two different index fields. (This search phrase would work if you linked the search criteria with the AND operator, however.)

Examples:

Customer Name = Bluegrass Records OR Customer Name = The Glass Harmonica — This search returns documents for either **Bluegrass Records** or **The Glass Harmonica** (or both, if the document type selected contains documents for both stores).

Invoice Number = 11187 OR Invoice Number = 11189 — This search will return documents for either invoice **11187** or invoice **11189** or both.

CONTENT SYSTEM

The topics in this section provide information about:

❑ Storage Management

❑ Maintenance Management

❑ Document Management

❑ Document Retrieval

❑ Transfer

STORAGE MANAGEMENT

MSAdmin provides a system administrator with tools to define how and where Monarch Server compresses and stores reports. How and where those reports are stored has a direct impact on the overall speed and flexibility of the system.

Reports put into the Monarch Server system are stored in logical storage bins referred to as storage groups. All data in a storage group is stored together, so keep this in mind when establishing these groups. You may want to store all accounting reports in one storage group and all personnel reports in another. All reports having the same retrieval requirements might be stored together. Or, you may want to store all reports in a single storage group. Each organization will have different requirements based on its specific company policies and procedures.

Each storage group may be composed of several storage volumes, each volume having a specific, user-defined size. You may create several copies of each volume, each copy with its own physical location. A single storage group is actually a volume set, and each volume set includes multiple sub-volumes.

Volumes are used as a means of segmenting the increasing number of stored reports in a storage group. Segmenting the number of stored documents into smaller, more manageable pieces facilitates the migration of older data to nearline or offline storage media.

Each volume contains at least one copy. This copy is where the compressed report files that have been processed by Monarch Server are recorded initially. Additional copies may be recorded to other storage locations for data redundancy and long-term archival purposes.

Each storage group contains a set of volumes of the **First Copy** or **Second Copy**. When creating a storage group, the sub-volume size is defined. All the files for the current storage group will be grouped by sub-volumes, each of which will have the fixed maximum size defined by a storage group.

A storage group is also defined by such term as current sub-volume. This is the sub-volume all the new files are created on. If the current sub-volume is completed (or reaches the maximum size), it is closed and a new sub-volume is created. It becomes the current sub-volume. A new sub-volume may be created on any volume with the same type (**First Copy** or **Second Copy**), which is contained in the storage group. The system chooses the first volume, which has enough space for creating another full sub-volume.

For more information about storage groups, see Storage Groups.

For more information about storage volumes, see Storage Volumes.

Storage Volumes

A storage volume is a physical location on a server, to which reports can be archived, and from which documents can be retrieved. You can use storage volumes to segment the continually growing amount of data in a storage group.

Segmenting stored data into smaller, more manageable pieces facilitates the migration of older data to nearline or offline storage media.

NOTES

Volumes are subdivided into sub-volumes.

Each storage volume in the Monarch Server system is either a **First Copy** or a **Second Copy** volume. When you assign a storage volume to a storage group, you must specify the copy number of the volume (either **1** or **2**).

The first volume you add to the Monarch Server system should be designated a **First Copy** volume. This **First Copy** volume is where the compressed report files that are archived in the system are initially written to. **First Copy** volumes usually reside on fast devices. They should provide quick access because they use the most often retrieved documents. **Second Copy** volumes may reside on slower devices (such as magneto-optical) and can be used for data redundancy and long-term archival purposes.

Each document may reside on the volumes of the **First Copy** or **Second Copy**, or on both. When performing document retrievals, the system attempts to extract data from the volumes of the **First Copy** initially. If the data on the **First Copy** was either moved (Maintenance Task — Move) or copied (Maintenance Task — Copy) into **Second Copy** AND was purged (Maintenance Task — Purge), it will attempt retrieval from the volumes of the **Second Copy**.

See About Copies for additional information.

You can move a document from one copy to another using maintenance tasks.

All storage volumes used in the system are listed on the Volumes page. To display this page, click **Content System** on the Navigation Tree, then click **Storage** and select **Storage Volumes**. Use this page to add, edit, or remove a storage volume.

To add data to a storage volume

1. Configure a filing task.
2. Run it via a filing process.

To remove data from a storage volume

1. Configure a maintenance task.
2. Run it via a maintenance process.

 The volume can be closed to prevent further writing and copying operations to this volume, or can be set as Read Only to restrict access to deletion of this volume.

About Copies

A copy is a storage volume that receives data (reports or documents) when it is archived in the system. Each volume in the Monarch Server system is either a **First Copy** or a **Second Copy** volume. When you assign a storage volume to a storage group, you must specify the copy number of the volume (either **1** or **2**).

The first volume you add to the Monarch Server system should be designated a **First Copy** volume. This **First Copy** volume, which should reside on a mass storage device, is where the compressed report files that are archived in the system are initially written to. Subsequent volumes (that is, **Second Copy** volumes) may reside on any kind of storage medium, and can be used for data redundancy and long-term archival purposes. When performing document retrievals, the data on a **First Copy** volume will be accessed before the data on a **Second Copy** volume.

First Copy Volume

If the data is to be accessed frequently, you may choose to continue to retain the **First Copy** volume until data retrieval requirements subside. As reports are filed to this location, they are maintained in sub-volumes according to

the specified sub-volume size. You may specify more than one **First Copy** volume. The first **First Copy** volume in the list will be used until it is full. Then the second **First Copy** volume will be used, etc.

NOTES

Data should not be moved or copied to a **Second Copy** volume until you are sure it is "error-free", as data in a **Second Copy** volume cannot be removed from the system.

Second Copy Volume

A **Second Copy** volume is a storage location where reports are archived for long-term storage. Typically, this is an optical storage device (for example, CD-ROMs, CD-ROM drive, etc.). If you don't specify a **Second Copy** volume, data remains in a **First Copy** volume indefinitely.

In practice, the way it works is this: A report is filed into a **First Copy** volume for temporary storage. If there was an error in a report or the archive process, the data can be deleted from the **First Copy** volume. Once the data has been determined to be correct (and/or once the retrieval demand for it decreases enough), it can be copied or moved to a **Second Copy** volume.

NOTES

Once data has been moved or copied to a **Second Copy** volume, it cannot be deleted from the system.

There are two ways, via maintenance tasks, to permanently archive data in a **Second Copy** volume:

1. **Copy 1 to 2** maintenance task: Copies the data to a **Second Copy** volume, but retains it in a **First Copy** volume.

2. **Move** maintenance task: Moves the data from a **First Copy** volume to a **Second Copy** volume. After that it is possible to delete the **First Copy** volume (**First Copy** volumes can only be deleted if they are empty, that is, if they contain no data). The **Second Copy** volume will be used for all subsequent retrievals.

NOTES

If data that has been moved to a **Second Copy** volume needs to be accessed frequently again, the data could be copied back to mass storage for faster retrievals.

Adding a Storage Volume

When you add a storage volume to the system, you designate a physical location on a server for archiving reports. Every time you add a volume, you must assign the volume to a storage group and specify whether it is a **First Copy** or a **Second Copy** volume.

NOTES

The first volume you add should be designated as a **First Copy** volume.

(See About Copies for more information.)

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Volumes**.

2. Click ➕ on the **Volumes** page. The **Storage Volume** page appears.

> **NOTES**
>
> Field value defaults for some of these fields can be preset in MSAdmin.
> To do this, click **System Settings** on the Navigation Tree, select **System Preferences** and click the **System Defaults** tab. Setting these defaults can save time and errors in definition of storage volumes.

- Enter a unique name of a new storage volume into the Storage Volume Name field.
- Enter the text defining the storage volume into Description field. This step is optional.
- Select the name of a server from Location list. Select the Any Location option, if you will specify a UNC path in the Path field.
- Select the name of a server from a list. You can select the Any Location option, if you specified a UNC path in the Path field.

> **NOTES**
>
> If the required server is not on the list, refer to Locations Management topic to add a new location.

3. **Path**: Enter a path to the volume or use the **Browse** button. This path must be unique. In some cases such as defining a path using UNC paths, it may be required to manually create the path on the server. Typically, Monarch Server will create the storage path if needed.

4. Enter the maximum size of the volume into the **Maximum Volume Size field. Volume size** is measured in megabytes or gigabytes depending on the value you select from the list. **Current Size in bytes**: Displays the current volume size when editing only. This value will not be displayed for a new volume.

> **NOTES**
>
> The **Location**, **Maximum Volume Size**, and **Path** boxes are available only when adding a new volume.

5. Select **Read only** check box if you want to prevent deletion of a volume.

6. Select **Closed** check box to prevent further writing and copying operations to this volume.

> **NOTES**

Storage Volume is Assigned To|Copy #: This list contains a storage group with an associated copy number. This is an information box only. The contents of this box cannot be edited.

7. To save a new storage volume, click **Save**.
   If the operation is completed successfully, the system saves the new storage volume to the database and displays the updated **Volumes** page.

8. To clear the recent changes, click **Clear**.

9. To cancel the operation and return to the **Volumes** list without saving data, click **Cancel**. Keep in mind that no changes will be saved.

Assigning Storage Volumes to Storage Groups

After adding a storage volume you can assign it to a storage group. If no storage groups exist, you will need to create one and then add the storage volume to it.

To assign a storage volume to a storage group

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.

2. Click the name of a storage group you want to add a volume to or click anywhere on its row and then click ✏️ .

3. Drag a storage volume from the Available Storage Volumes pane to the Assigned Storage Volumes|Copy# pane.

4. Under the **Assigned Storage Volumes | Copy #**, select either **#1** or **#2** to specify a copy number for the volume.

5. To assign the volume to the group, click **Save**.

Editing a Storage Volume

To edit a storage volume

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Volumes**.

2. On the Volumes page, click the name of the storage volume you want to edit or click anywhere on its row, and then click ✏️ .
   The **Storage Volume** page appears. For details about how to change its items refer to Adding a Storage Volume.

3. Make the necessary changes and click **Save**.
   The system saves the modified storage volume to the database and displays the updated **Volumes** page.

Deleting a Storage Volume

If you no longer need a storage volume, you can delete it. Before you can delete a volume, however, you must remove all data from it. Volumes that contain any data cannot be deleted. In addition, if the volume you want to delete is the only volume assigned to a storage group, you will not be able to delete it because a storage group cannot exist unless a storage volume is assigned to it.

To delete a storage volume

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Volumes**.

2. Click ✖ at the end of the row with the storage volume you want to delete. A dialog box will appear.

3. Click **Delete** to delete the storage volume from the list.

NOTES

You cannot delete a storage volume, if it contains data files.

Storage Groups

A storage group is a logical storage location for reports filed into the Monarch Server system. Each storage group may include several storage volumes.

All the storage groups used in the system are listed on the Storage Groups page. To display this page, click **Content System** on the Navigation Tree, then click **Storage** and select **Storage Groups**.

Use **Storage Groups** page to add, edit, or remove a storage group.

The page displays a storage group name, the maximum sub-volume size and the count of existing sub-volumes for each storage group on the list.

Adding a Storage Group

When adding a storage group, you need to specify the maximum size (in megabytes or gigabytes) for any sub-volumes that are subsequently assigned to it. You also need to assign at least one storage volume to the storage group (a storage group must contain at least one volume). If no storage volumes exist, you need to create one before you can add a storage group to the system.

You also need to specify a copy number for the volume. Before specifying this information, you should determine what device type will be used for archiving documents. The media size must be accounted for when defining the sub-volume size.

You should also take into account when the media is to be recorded, and whether it is to be recorded over multiple sessions (requiring a dedicated device) or all at once (for backup).

To add a storage group

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.

2. Click ➕ on the **Storage Groups** page.

3. **Storage Group Name**: Enter a unique name of a new storage group.

4. **Description**: Enter any text defining the storage group. This step is optional.

5. **Maximum Sub-Volume Size**: Enter the maximum size of any sub-volumes measured in megabytes or gigabytes.

   - The size should be no greater than 80% of the media or device size that will serve as the smallest archive storage for the reports contained in this storage group. For example, if your selected archive media is CD-ROM, which has a storage capacity of 650 Megabytes, you would enter 520 Megabytes in this box.

   - E-mail notifications can be configured to alert administrators when a storage volume is running out of space. The notification will be sent when the available free space of a volume is less than 2 x Storage Group size. See System Notifications for additional instructions.

NOTES

You cannot change the maximum sub-volume size for an existing storage group.

6. **Force sub-volume promotion**: Select this check box to force sub-volume promotion after a specified number of files. When the number of files in the current (active) sub-volume reaches the specified value, this sub-volume

will be forced to close and a new active sub-volume will be created automatically. The number of files can be configured in the Monarch Server properties configuration file. The default value is 10000. It is recommended to select this option to ensure proper performance.

7. **Number of Sub-Volumes**: Displays the number of existing sub-volumes for a storage group. This field is empty for a new storage group.

8. **Available Storage Volumes**: Displays the available storage volumes, created earlier by an administrator. To assign a storage volume to a storage group, drag it from the **Available Storage Volumes** pane to the **Assigned Storage Volumes | Copy#** pane.

9. **Assigned Storage Volumes | Copy#**: Displays the assigned storage volumes with the associated copy number. These storage volumes will be included in the current storage group. Include at least one storage volume of the **First Copy**. You can assign only volumes, whose size is greater or equal to the **Maximum Sub-Volume Size** value. To remove a storage volume from the storage group, drag it to the left pane. To change a copy number for a volume, select either **#1** or **#2**.

10. To save a new storage group, click **Save**.
    If the operation is completed successfully, the system saves the new storage group to the database and displays the updated **Storage Groups** page.

11. To clear the recent changes, click **Clear**.

12. To cancel the operation and return to the **Storage Groups** page without saving data, click **Cancel**. Keep in mind that no changes will be saved.

Assigning Storage Volumes to Storage Groups

After creating a storage volume, you can assign it to a storage group. If there are no storage groups, you need to create one and then add the storage volume to it.

To assign a storage volume to a storage group

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.

2. Click the name of the storage group you want to assign a volume to or click anywhere on its row and then click
    .

3. Drag a storage volume from the Available Storage Volumes pane to the Assigned Storage Volumes|Copy# pane.

4. Under the **Assigned Storage Volumes | Copy #**, select either **#1** or **#2** to specify a copy number for the volume.

5. To assign the volume to the group, click **Save** .

Editing a Storage Group

To edit a storage group

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.

2. On the Storage Groups page, click the name of the storage group you want to edit or click anywhere on its row, and then click .
    The Storage Group page appears. For details about how to change its items, refer to Adding a Storage Group.

3. You can promote a sub-volume for the current storage group. To do this, select the **Sub-Volume Information** tab, and click **Promote**.

   NOTES

   This tab displays information about the storage group's sub-volumes and is available only for existing storage groups. (For details, see Viewing Information On a Sub-Volume.)

4. Make the necessary changes and click **Save**. The system saves the modified storage group to the database and displays the updated Storage Groups page.

Deleting a Storage Group

To delete a storage group

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.

2. Click ✖ at the end of the row with the storage group you want to delete. A dialog box will appear.

3. Click **Delete** to remove the storage group from the list.

Sub-Volumes

A sub-volume, like a storage volume, is a physical location on a server, to which reports can be archived and from which documents can be retrieved. A sub-volume is a subdivision (that is, a subdirectory) of a storage volume.

When you first archive reports into a volume, the reports are automatically stored in the first sub-volume. (Initially, volumes contain only one sub-volume.) If you promote the sub-volume, or if the sub-volume is automatically promoted — for example, when the maximum sub-volume size (specified on the Storage Group page) is reached — the first sub-volume is closed and a second sub-volume is opened. Reports will be archived to this second sub-volume until it is promoted too.

A new sub-volume may be created on any volume of the same type (**First Copy** or **Second Copy**), which is contained in the storage group. The system selects the first volume, which has enough space for creating another full sub-volume.

Volumes can contain an unlimited number of sub-volumes. The only limiting parameter is the volume size (specified on the Storage Volume page when adding a volume). Once the specified maximum volume size is reached, no additional sub-volumes can be opened on that volume.

A storage volume may be closed by an administrator to prevent further writing.

You can view detailed information about the storage group's sub-volumes on the **Sub-Volumes Information** tab.

Promoting a Sub-Volume

A sub-volume is automatically promoted (that is, closed) when it reaches its maximum allowed size. (This maximum size is specified on the Storage Group page, when the storage group is created.) Once a sub-volume is closed, you can no longer archive reports into it. Sub-volumes are numbered sequentially, so each time a sub-volume is promoted, the next sub-volume in the sequence begins. A sub-volume cannot be backed up or removed from the system until it has been promoted.

There may be situations where you would like to force MSAdmin to begin a new sub-volume even though the current one is not completely full. For example, you may want to keep all reports for a particular month on a single sub-volume. Or you may not want to start a new fiscal year on a sub-volume that contains information from the previous year. In such cases, you can manually promote a sub-volume and begin a new one.

To manually promote a sub-volume

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.

2. On the Storage Groups page, click the name of the storage group that contains the sub-volume to be promoted or click anywhere on its row, and then click ✎ .

3. Select the **Sub-Volumes Information** tab at the top of the page. This tab lists all sub-volumes of a storage group and provides information about their status (i.e., active or closed), number of files, etc.

4. Click **Promote**. A dialog box appears, asking you to confirm that you want to promote the sub-volume.

5. Click **OK** to promote the sub-volume (or click **Cancel** to cancel the promotion).

Viewing Information On a Sub-Volume

To view detailed information about the sub-volume(s) of the selected storage group

1. On the Navigation Tree, click **Content System**, then click **Storage** and select **Storage Groups**.
2. Click the name of the storage group that contains the sub-volume or click anywhere on its row, and then click
   ✏ .
3. Select the **Sub-Volumes Information** tab at the top of the page.

   The Volume Information window provides the following information:

   - **State**: Displays the current status of the sub-volume, e.g., whether it is active or closed.

   NOTES

   It is not possible to archive data to closed sub-volumes.

   - **Number of files**: Displays the number of files in a sub-volume.
   - **First Copy volume**: Displays the name(s) of a First Copy volume(s).
   - **Size on first copy**: Displays the size (in bytes) of data stored in a First Copy volume.
   - **Second copy volume**: Displays the name(s) of a Second Copy volume(s).
   - **Size on second copy**: Displays the size (in bytes) of the data stored in a Second Copy volume.
   - **Promote**: Click to promote the sub-volume. A dialog box appears. Click OK to promote the sub-volume. Note: When you promote a sub-volume, you close it. Data cannot be added to closed sub-volumes.
   - **Cancel**: Click to cancel the promotion.

MAINTENANCE MANAGEMENT

The topics in this section provide information about:

- ❑ Maintenance Tasks
- ❑ Log Clearance Tasks
- ❑ Maintenance Processes
- ❑ Full Text Search

Maintenance Tasks

A maintenance task is the operation of copying, moving, and deleting files to maintain document storage. You need to assign maintenance tasks to a maintenance process in order to execute them.

A maintenance task operates on the document files basis (not document object basis).

All maintenance tasks used in the system are listed on the Maintenance Tasks page. To display this page, click **Content System** on the Navigation Tree, then click **Maintenance** and select **Maintenance Tasks**.

Use this page to add, edit, or remove a maintenance task from the list.

The following types of maintenance tasks are available on the Maintenance Task page:

- ❑ **Block**: Blocks certain reports to deny user access. You can also block reports of a document type by clicking on the Report Instances tab.

- ❑ **Change DTA_indices**: Changes indexes for pre-mining models.

- ❑ **Copy 1 to 2**: Copies data from First Copy volumes to Second Copy volumes.

- ❑ **Copy 2 to 1**: Copies data from Second Copy volumes to First Copy volumes.

- ❑ **Delete**: Deletes files from the database and from First Copy volumes. However, the files remain on a Second Copy volume, if any.

- ❑ **Drop DTA table(s)**: Removes pre-mined data from the MS database including tables for the reports matching the task criteria.

- ❑ **Drop Empty Index Values Tables**: Removes tables with empty index values, to speed up the partition creation. This task is recommended if you update a database created in the previous version of the application.

- ❑ **Drop Pre-Mined Data**: Removes pre-mined data from the DTA tables in the MS database for the reports matching the task criteria.

- ❑ **Full Text Search**: Searches for reports containing the specified text.

- ❑ **Move**: Moves data form First Copy volumes to Second Copy volumes. The reverse moving task (from Second Copy to First Copy) is not supported.

- ❑ **Pre-Mined Data**: Pre-extracts table data from reports during a filing process (as part of archiving report data), and puts it into the MS database.

- ❑ **Purge**: Files are removed from First Copy volumes only if they exist on Second Copy volumes. The system does not remove files from the database and they are available for viewing and searching as usual.

- ❑ **Re-index**: Recreates indexes for documents and is used when one of the Monarch models is changed.

- ❑ **Rename**: Renames reports and documents. The name model is set in the Auto-Name and Report Name options of the appropriate Document Type.

- ❑ **Restore from Archive**: Restores archived-only reports back into working storage where users can view and mine them.

After configuring a maintenance task, in order to run it, you need to configure a maintenance process and assign the task to it. Then you may either specify the execution frequency for the maintenance process, or execute it manually. When the maintenance process runs, the assigned maintenance task is executed.

Adding a Maintenance Task

With maintenance tasks you can copy, move, delete, purge and re-index data. To run a maintenance task, you create a maintenance process and assign the task to it (or you can assign the task to an already existing process). When the maintenance process is executed, it will run the task(s) assigned to it.

To add a maintenance task

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the **Maintenance Tasks** page.

3. **Maintenance Task Name**: Enter the name of a new maintenance task.

4. **Description**: Optionally, enter any text defining the maintenance task.

5. **Task Priority**: If there are several tasks in queue, the system will first handle those with higher priority. Select priority from the following options: **Lowest**, **Below Normal**, **Normal**, **Above Normal**, **Highest**.

6. **Task Type**: Specify the type of a task. This list contains the following types:

   - **Block** — Blocks certain reports to deny user access. You can also block reports of a document type by clicking 🔒 on the Report Instances tab.

   - **Change DTA_indices**: Changes indexes for premining models.

   - **Copy 1 to 2**: Copies data from First Copy volumes to Second Copy volumes.

- **Copy 2 to 1**: Copies data from Second Copy volumes to First Copy volumes.

- **Delete**: Deletes files from the database and from First Copy volumes. However, the files remain on a Second Copy volume, if any.

- **Drop DTA table(s)**: Removes pre-mined data from the MS database including tables for the reports matching the task criteria.

- **Drop Empty Index Values Tables**: Removes tables with empty index values, to speed up the partition creation. This task is recommended if you update a database created in the previous version of the application.

- **Drop Pre-Mined Data**: Removes pre-mined data from the DTA tables in the MS database for the reports matching the task criteria.

- **Full Text Search**: Searches for reports containing the specified text.

- **Move**: Moves data form First Copy volumes to Second Copy volumes. The reverse moving task (from Second Copy to First Copy) is not supported.

- **Pre-Mine Data**: Pre-extracts table data from reports during a filing process (as part of archiving report data), and puts it into the MS database.

- **Purge**: Files are removed from First Copy volumes only if they exist on Second Copy volumes. The system does not remove files from the database and they are available for viewing and searching as usual.

- **Re-index**: Recreates indexes for documents and is used when one of the Monarch models is changed.

- **Rename**: Renames reports and documents. The name model is set in the Auto-Name and Report Name options of the appropriate Document Type.

- **Restore from Archive**: Restores archived-only reports back into working storage where users can view and mine them.

- **Search Text**: The following option becomes available if you select the Full Text Search task type. Type here the text you want to find in the report.

7. **Max Result Count (0: unlimited)**: The following option becomes available if you select the **Full Text Search** task type. Limit the number of displayed reports. If you enter **0**, all reports are displayed.

8. **Whole words only** check box: The following option becomes available if you select the **Full Text Search** task type. Select this check box to search for the whole words only.

9. **Case sensitive** check box: The following option becomes available if you select the **Full Text Search** task type. Select this check box to distinguish between upper and lowercase letters while searching.

Criteria section

1. **Based on**: Select one of the following options:

   - **Report/Document Dates**: If you select this option, the current task will process reports/documents with creation dates specified in the Date Range field.

   - **Filing Dates**: If you select this option, the current task will process reports/documents with filing dates specified in the Date Range field.

2. **Date Range**: If you select this option, the current task will process reports with dates specified in the **From ... To** boxes. Click 🗓 to use the Calendar.

3. **Document Age in days**: If you select this option, the current task will process reports with creation dates specified in the **Younger than ... Older than** boxes.

4. **Except**: If you select this option, the current task will process all reports in the **Document Types** pane with the exception of several latest reports number of which is specified in the **latest** box in conformity with the defined **Based on** parameters, namely **Report/Document Dates** or **Filing Dates**.

5. **Count of Reports/Files**: Specifies that the current task will process reports defined by the first/last count of reports you set in the **First** or **Last** boxes. The reports will be sorted by a document date.

   - For all selected document types: applies values from Count of Reports/Files fields to all selected document types.

- For each document type selected: applies values from Count of Reports/Files fields to a selected document type only.

6. **Containing Index Value**: This option becomes available after you select a document group in the section below, and assign document types to the task (provided that index fields of the document type are mapped with the corresponding keyword types). Select this option, if you want to specify an index value as one of the maintenance criteria. When you select it, the **Maintenance Criteria** box to the right becomes available. Click **Maintenance Criteria** to expand a hidden section. Select an index field from the list, select an operator from the list, and type a keyword value. You can lookup available keywords by clicking the **Keyword Lookup** button. Click **Save** and the new maintenance criteria will be displayed in a dimmed box.

Document Types section

Click this header to expand a section with the following items:

1. **Document Groups**: Allows you to select a document group from the list. After selection, the system displays all document types for this group, used by the current task, in the **Document Types** pane.

2. **Document Types**: Displays all document types for the document group, selected from the **Document Groups** list. These are used by the current task.

3. **Filter by**: Enter part of the name of a document type you want to find, and click **Apply**.

4. **Assigned Document Types**: In the **Document Types** pane, select the document types that you wish to assign to the task, and drag them to the **Assigned Document Types** pane.

> **NOTES**
>
> The 🗑 icon allows you to remove assigned document types from the list.

Re-index options

> **NOTES**
>
> These options become available if you select the **Re-index** task type.

1. **Perform re-pagination**: Allows to re-paginate the volume data. Becomes available on **Re-index** task selection.

2. **Remove Deleted Documents**: Allows to remove deleted documents during **Re-index** task.

3. **Remove Deleted Documents Only**: Re-Index is not performed, only deleted documents are removed.

4. **Use Index Defaults**: Allows use of default document indexes, including original file name element indexing. This option is only visible when using the **Re-index** Maintenance Task type.

5. **Indexed Fields**: This button appears on **Change DTA_indices** task selection. It calls the **Choose Indexed Fields** dialog box.

Redaction options

> **NOTES**
>
> These options become available only if a redaction license is enabled in

MS.

1. **Store reports redacted**: Select this option to allow storage reports to be stored with redaction. In this case reports are stored in the redacted format in storage volume.

> **NOTES**
>
> This option becomes available only if you select the **Restore from Archive** task type.

2. **Store mining data redacted**: Select this option to allow pre-mined data to be stored with redaction.

> **NOTES**
>
> This option becomes available only if you select the **Pre-Mine Data** task type.

Delete options

> **NOTES**
>
> These options become available if you select the **Delete** task type.

1. **Delete Working Reports**: Select this option to delete only working reports.
2. **Delete Report Archives**: Select this option to delete report archives.
3. **Delete All**: Select this option to delete all reports.
4. To save a new maintenance task, click **Save**. If the operation is completed successfully, the system saves the a new maintenance task to the database and displays the updated **Maintenance Tasks** page.
5. To clear the recent changes, click **Clear**.
6. To cancel the operation and return to the **Maintenance Tasks** page without saving data, click **Cancel**. Keep in mind that no changes will be saved.

Copying Data from a First Copy Volume to a Second Copy Volume

Once the demand for documents in a **First Copy** volume decreases sufficiently, you may want to copy or move the data to a **Second Copy** volume.

> **NOTES**
>
> Before copying data from a **First Copy** volume to a **Second Copy** volume, make sure that it is error-free, because once it is archived in a **Second Copy** volume, it cannot be deleted from the system.

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The **Maintenance Task** page appears.

3. Configure a maintenance task, making sure to select the **Copy 1 to 2** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the **Maintenance Processes** page.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the **Maintenance Process** page.
   When the process is executed, the maintenance task runs and the data is copied from the **First Copy** volume to the **Second Copy** volume.

Copying Data from a Second Copy Volume to a First Copy Volume

Sometimes you need to copy data from a **Second Copy** volume to a **First Copy** volume. You can configure a maintenance task to perform this operation in MSAdmin.

To copy data from Second Copy to First Copy volume

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Copy 2 to 1** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and the data is copied from the **Second Copy** volume to the **First Copy** volume.

Moving Data from a First Copy Volume to a Second Copy Volume

You can move data from a **First Copy** volume to a **Second Copy** volume. Before doing so, however, make sure that it is error-free, because once it is archived in a **Second Copy** volume, it cannot be deleted from the system.

To move date from a First Copy volume to a Second Copy volume

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Move** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. [Configure a maintenance process](#), making sure to assign the maintenance task you just created to it.

8. [Schedule the process to run](#), or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and the data is moved from the **First Copy** volume to the **Second Copy** volume.

Deleting Data from a First Copy Volume

You can delete data from a **First Copy** volume, if the data it contains already resides on a **Second Copy** volume. (A **First Copy** volume cannot be deleted unless the data it contains also resides on a **Second Copy** volume.) If the data doesn't yet reside on a **Second Copy** volume, you must first [move](#) or [copy](#) it to the **Second Copy** volume.

To delete date from a First Copy volume

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. [Configure a maintenance task](#), making sure to select the **Delete** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. [Configure a maintenance process](#), making sure to assign the maintenance task you just created to it.

8. [Schedule the process to run](#), or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and the data deleted from the **First Copy** volume.

Purging a First Copy Volume

When you purge a **First Copy** volume, the data it contains is removed. Only **First Copy** volumes can be purged (**Second Copy** volumes cannot be purged), and you can only purge a **First Copy** volume if the data it contains also resides on a **Second Copy** volume. (See [Copying Data from a First Copy Volume to a Second Copy Volume](#) for related information.)

NOTES

Purging a **First Copy** volume does not remove its files from the database.
They are available for viewing and searching as usual.

To purge a First Copy volume

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. [Configure a maintenance task](#), making sure to select the **Purge** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. [Configure a maintenance process](#), making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

    When the process is executed, the maintenance task runs and the data purged from the **First Copy** volume.

Re-indexing Archived Documents

Sometimes you need to re-index documents stored in the system (for example, when you change the model or autoname string of a document type). To re-index archived documents, you need to configure and run a re-index maintenance task.

To re-index archived documents

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Re-index** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

    When the process is executed, the maintenance task runs and the documents are re-indexed.

Pre-Mined Data Maintenance Task

The **Pre-Mined Data** maintenance task allows you to pre-extract table data from reports during a filing process (as part of archiving report data), and put it into the MS database, if the document type has a premining model assigned to it.

To pre-mine data

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Pre-Mined Data** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

    When the process is executed, the maintenance task runs and the data is pre-mined.

Dropping Pre-Mined Data

The **Drop Pre-Mined Data** maintenance task allows to remove pre-mined data from the MS database. The archived documents become non pre-mined after running the task.

To drop pre-mined data

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Drop Pre-Mined Data** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and the pre-mined data is removed.

Dropping DTA Tables

The **Drop DTA table(s)** maintenance task allows to remove pre-mined data from the MS database including tables for the reports matching the task criteria.

To drop DTA tables

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Drop DTA table(s)** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and all premined data including tables is removed from the database.

Drop Empty Index Values Tables

The **Drop Empty Index Values Tables** maintenance task allows to remove tables with empty index values, to speed up the partition creation. This task is recommended if you update a database created in the previous version of the application.

To drop tables with empty index values

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ➕ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Drop Empty Index Values Tables** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ➕ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and all tables with empty index values are removed from the database.

Changing DTA Indices

The **Change DTA_indices** maintenance task allows to change indexes for a premining model.

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ✛ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Change DTA_indices** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ✛ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and the indexes for the pre-mining model are changed.

Full Text Search Task

The **Full Text Search** maintenance task allows to search for reports containing the specified text.

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ✛ on the Maintenance Tasks page. The Maintenance Task page appears.

3. Configure a maintenance task, making sure to select the **Full Text Search** option from the **Task Type** drop-down list.

4. Click **Save**.

5. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

6. Click ✛ on the Maintenance Processes page. The Maintenance Process page appears.

7. Configure a maintenance process, making sure to assign the maintenance task you just created to it.

8. Schedule the process to run, or run it manually by clicking **Run Now** on the Maintenance Process page.

   When the process is executed, the maintenance task runs and a link to the reports containing the specified text is displayed in the Full Text Search list.

Assigning Maintenance Tasks to Maintenance Processes

To execute a maintenance task, you need to assign it to a maintenance process. The process runs and executes the task at a certain time, according to the scheduled execution frequency.

> **NOTES**
>
> You can configure a new maintenance process and add the maintenance task to it, or you can add the task to an existing process.

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**. The Maintenance Processes page appears.

2. On the **Maintenance Processes** page, click the name of the maintenance process you want to add a maintenance task to or click anywhere on its row, and then click ✎ .

3. From the **Available Tasks** pane, drag the appropriate task to the **Assigned Tasks** pane.

4. Set the process execution frequency.

5. Click **Save**.

The process will execute the maintenance task according to the scheduled execution frequency.

> **NOTES**
>
> If you prefer, you can execute the process right away by clicking the **Run Now** button.

Running a Maintenance Task

When you finish configuring a maintenance task, you can run it to perform the specified maintenance action.

To run a maintenance task

1. Configure a maintenance process.

   > **NOTES**
   >
   > If the desired maintenance process already exists, skip down to step 2.

2. Assign the maintenance task to it.

3. Run the maintenance process. When the process is executed, the tasks assigned to it will be run as well.

Editing a Maintenance Task

Maintenance Tasks can be edited via the Maintenance Task page.

To edit a maintenance task

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**. The Maintenance Tasks page appears.

2. Click the name of the maintenance task you want to edit or click anywhere on its row, and then click ✎ . The **Maintenance Task** page appears. For details about how to change its items refer to Adding a Maintenance Task.

3. Make the necessary changes and click **Save**. The system saves the modified maintenance task to the database and displays the updated **Maintenance Tasks** page, if the operation is completed successfully.

Deleting a Maintenance Task

You can delete a maintenance task if you no longer need it.

If the maintenance task you want to delete is the only task assigned to a process, that process will be deleted as well, since an empty process (that is, a process that contains no tasks) cannot be saved.

To delete a maintenance task

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Tasks**.

2. Click ✖ at the end of the row with the maintenance task you want to delete.

3. Click **Delete** to delete the maintenance task from the list.

Log Clearance Tasks

A log clearance task deletes records of a specified type from the Logs and Schedule Jobs tables of the Monarch Server database. Use these tasks to delete old (or unnecessary) events from the database. They help to use database space economically.

To display the **Log Clearance Tasks** page, click **Content System** on the Navigation Tree, then click **Maintenance** and select **Log Clearance Tasks**. Use this page to add, edit, or delete log clearance tasks.

The following Event Source types of Logs table of log clearance tasks are available:

❑ **Audit**: Select this option to delete audit events.

❑ **Entity Audit**: Select this option to delete entity audit events.

❑ **Filing**: Select this option to delete filing events.

❑ **Maintenance**: Select this option to delete maintenance events.

❑ **Security**: Select this option to delete security events.

❑ **System**: Select this option to delete system events.

The following job statuses of the Schedule Jobs table of log clearance tasks are available:

❑ **Completed**: Select this option to delete completed job log.

❑ **Failed**: Select this option to delete failed job log.

Adding a Log Clearance Task

To add a log clearance task

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Log Clearance Tasks**.

2. Click ➕ on the **Log Clearance Tasks** page.

3. **Maintenance Task Name**: Enter the name of a new log clearance task.

4. **Description**: Optionally, enter any text defining the clearance task.

5. **Date**: Specify the dates of events to be deleted by the current task in the **From ... To** boxes. Click 🗓 to use the Calendar.

6. **Please, select Tables for clearing:** Specify the table to delete records from.

7. Select the event types or the job log statuses to delete from the specified table.

8. **Select All**: Click this button to select all options.

9. **Select None**: Click this button to clear the selection.

10. To save a new log clearance task, click **Save**.
    If the operation is completed successfully, the system saves the a new task to the database and displays the updated **Log Clearance Tasks** page.

11. To clear the recent changes, click **Clear**.

12. To cancel the operation and return to the **Log Clearance Tasks** page without saving data, click **Cancel**. Keep in mind that no changes will be saved.

Editing a Log Clearance Task

To edit a log clearance task

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Log Clearance Tasks**. The Log Clearance Tasks page appears.

2. Click the name of the log clearance task you want to edit or click anywhere on its row, and then click   ✎ .
   The Log Clearance Task page appears. For details about how to change its items refer to Adding a Log Clearance Task.

3. Make the necessary changes and click **Save**. The system saves the modified log clearance task to the database and displays the updated **Log Clearance Tasks** page, if the operation is completed successfully.

Deleting a Log Clearance Task

To delete a log clearance task

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Log Clearance Tasks**.

2. Click ✖ at the end of the row with the log clearance task you want to delete. A dialog box will appear.

3. Click **Delete** to delete the log clearance task from the list.

Running a Log Clearance Task

When you finish configuring a log clearance task, you can run it to perform the specified action, in the same way as you assign a maintenance task.

To run a log clearance task

1. Configure a maintenance process.

   NOTES

   If the desired maintenance process already exists, skip down to step 2.

2. Assign the log clearance task to the maintenance process, in the same way as you assign a maintenance task.

3. Run the maintenance process. When the process is executed, the tasks assigned to it will be run as well.

Maintenance Processes

A maintenance process defines the schedule of executing maintenance tasks and log clearance tasks. All maintenance processes used in the system are listed on the Maintenance Processes page.

To display the Maintenance Processes page, click **Content System** on the Navigation Tree, then click **Maintenance**, and select **Maintenance Processes**.

The list shows:

❑ Process name

❑ Run Now (click 🕐 to run the process immediately)

❑ Suspend status

❑ Last started date and time

❑ Last finished date and time

❑ Next execution date and time of the current process

Use the **Maintenance Processes** page to add, edit, or delete a maintenance process.

You can also:

❑ Suspend all processes, by clicking the Suspend button below the list.

❑ Resume all processes, by clicking the Resume button below the list.

❑ Run a process immediately, by clicking the 🕐 icon next to its name.

❑ Update the status of maintenance processes by clicking the ⟳ icon, below the list.

With maintenance processes, you can schedule the execution of maintenance tasks to copy, move, delete, purge or re-index data. When a maintenance process runs, it executes all maintenance tasks that are assigned to it. With maintenance processes, you can schedule the execution of maintenance tasks to copy, move, delete, purge or re-index data. When a maintenance process runs, it executes all maintenance tasks and log clearance tasks that are assigned to it. Maintenance processes can be run on a scheduled or manual basis.

Adding a Maintenance Process

Maintenance processes are used to schedule and run maintenance tasks. When a maintenance process runs, it executes all maintenance tasks that are assigned to it.

To add a maintenance process

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

2. Click ➕ on the **Maintenance Processes** page. The Maintenance Process page appears.

3. **Name**: Enter the name of a new process.

4. **Number of concurrent tasks**: Enter the number of concurrent tasks. Enter **1**, if you want several tasks to be executed sequentially. Enter the actual number of tasks, if you want them to be executed simultaneously.

5. **Suspended**: Select this option to suspend the current process.

6. **Available Tasks**: Displays all available tasks, from which you can select tasks to assign to the current process. To do this, drag a task from the left pane to the right pane. The tasks are carried out in the order they appear on the list. You can change the order by dragging items up or down.

7. **Filter by**: The filter for the **Available Tasks** list. Type (part of) a task name, and click **Apply** to filter the list.

8. **Assigned Tasks**: The tasks in this pane will be assigned to the current process. To remove a task from this pane, drag it back to the left pane.

9. **Execution Frequency**: These options allow you to set the periodicity of launching the current process. For more information, see Execution Frequency.

10. To save a new process, click **Save**.
    The system saves the new process to the database and displays the updated Maintenance Processes page, if the operation is completed successfully.

11. To allow an administrator to launch the process immediately (subject to internal processing queues) and save the schedule in the database with the **Run Once** scheduling type and the current date as a date to run, click **Run Now**.

12. To clear the recent changes, click **Clear**.

13. To cancel the operation and return to the **Maintenance Processes** page without saving data, click **Cancel**. Keep in mind that no changes will be saved.

Execution Frequency

Execution frequency (or run time) specifies both how often a process will run (for example, once, hourly, daily, etc.) and at what time it will run. You specify execution frequency when configuring a filing or maintenance process.

The options in the Execution Frequency pane allow you to set periodicity of launching the current process. An administrator can set the following options:

❑ **One Time**: Select this option if you want to launch the current process only once.

- At: Set the time when the current process will be launched following the HH:MM format.

- on (mm/dd/yyyy): Set the date when the current process will be launched. Upon clicking the field, the calendar appears.

❑ **Hourly**: Select this option if you want to launch the current process at the specified hour or hours.

- At... minute(s) of Every hour: Set the time when the current process will be launched following the MM format.

❑ **Daily**: Select this option if you want to launch the current process in a specified number of days.

- Every ... day(s): Set the number of days after which the current process will recur.

- At: Set the time when the current process will be launched following the HH:MM format.

❑ **Weekly**: Select this option if you want to launch the current process weekly.

- Recur every: Set the number of weeks after which the current process will recur.

- Select corresponding days of the week.

- At: Set the time when the current process will be launched following the HH:MM format.

❑ **Monthly**: Select this option if you want to launch the current process monthly.

- Select the day when to perform the process.

  ◆ If you select **Day**, set the number of days in the box.

  ◆ If you select **Business Day**, set the business day(s) on which the current process will be launched. Business days are weekdays (i.e., Monday-Friday), unless an exception date is defined. The definition of Exception Dates can be used for holidays. When an exception day is found, the count skips to the next working day.

    The process will be executed immediately after exception date/time is over. Otherwise, the process will only run on the set schedule, with the exception of the Business Day schedule, wherein an "All day" Exception Date will be excluded in the day count.

    Examples:

    To run the process on the 6th business day of the month, enter "6" in the field.

    To run the process on the 1st business day of the month, then again on the 16th to the 20th business day of the month, enter "1, 16-20" in the field.

NOTES

It is possible to schedule the process on a range of working days at a given time, e.g., "5"; "1,2,22,23"; "1-3, 21-23"; "−1"; "−3-−1"; and "−2-3, 5, 10."

A negative number denotes the number of days prior to the month selected, e.g., "business day −1" of October 2019 would be September 30, 2019 (provided it is a working day). Exception Dates must skip count

to the next previous working day.

- ♦ If you select **The…**, select First, Second, Third, Fourth or Last from the first drop-down list and the day of the week from the second drop-down list.

- Select the month on which to perform the action.

- ♦ If you select the **of every n Month** option, set the number of month in the box.

- ♦ If you select the **of selected months** option, select the appropriate check box referring to the desired month.

- In the **At** check box set the time when the current process will be launched following the HH:MM format.

Assigning Maintenance Tasks to Maintenance Processes

To execute a maintenance task, you need to assign it to a maintenance process. The process runs and executes the task at a certain time, according to the scheduled execution frequency.

NOTES

You can configure a new maintenance process and add the maintenance task to it, or you can add the task to an existing process.

To assign a maintenance task to a maintenance process

1. On the Navigation Tree, click **Content System**, then click **Maintenance**, then select **Maintenance Processes**.

2. Click the name of the maintenance process you want to add the maintenance task to or clicking anywhere on its row, and then click ✏ .

3. From the **Available Tasks** pane, drag the necessary task to the **Assigned Tasks** pane.

4. Set the process execution frequency.

5. Click **Save**.

The process will execute the maintenance task according to the scheduled execution frequency.

NOTES

If you prefer, you can execute the process right away by clicking the **Run Now** button.

Running a Maintenance Process

When a maintenance process runs, it executes all maintenance tasks assigned to it. A maintenance process can be run in two ways:

Manually: To run a maintenance process manually

1. Click the 🕐 icon next to its name on the Maintenance Processes page or click the **Run Now** button at the bottom of the Maintenance Process page. You can do this immediately after configuring a new process, or you can manually run a previously configured process:

a. click **Content System**, then click **Maintenance Management** on the Navigation Tree and select **Maintenance Processes**.

b. Click the name of the process you want to run.

c. Click the **Run Now** button at the bottom of the Maintenance Process page.

NOTES

When you click the **Run Now** button, there may be a brief delay before the process actually runs. This is likely due to a time discrepancy between the server's clock and the clock on a local machine. Processes are run according to the time of the server's clock.

Scheduled: To execute a maintenance process via a scheduled runtime

1. Specify the execution frequency for it on the **Maintenance Process** page, then click **Save**.
    The process will be executed according to the scheduled execution frequency.

Editing a Maintenance Process

Maintenance Processes can be edited via the Maintenance Process page.

To edit a maintenance process

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

2. Click the name of the maintenance process you want to edit or click anywhere on the row, and then click ✏ .
    The Maintenance Process page appears. For details about how to change its items refer to Adding a Maintenance Process.

3. Make the necessary changes and click **Save**. The system saves the modified process to the database and displays the updated Maintenance Processes page.

Deleting a Maintenance Process

If you no longer need a maintenance process, you can delete it.

To delete a maintenance process

1. On the Navigation Tree, click **Content System**, then click **Maintenance** and select **Maintenance Processes**.

2. Click ✖ at the end of the row with the maintenance process you want to delete.

3. Click **Delete** to delete the maintenance process from the list.

Full Text Search

All results of the maintenance full text search type tasks in the system are listed on the Full Text Search page.

To display the Full Text Search page, click **Content System** on the Navigation Tree, then click **Maintenance** and select **Full Text Search**.

The list shows:

❑ **Search Text**: The text you entered while configuring a maintenance task.

❑ **Search Date**: The date when the search was fulfilled.

❑ **Task Name**: The name of the maintenance task.

- **Count**: A number of the results found.

- **Whole Words Only**: This field is marked if you selected the Whole Words Only check box while configuring a maintenance task.

- **Case Sensitive**: This field is marked if you selected the Case Sensitive check box while configuring a maintenance task.

You can also:

- Select the users to send notification to, by clicking the [icon] icon.

- Delete the result, by clicking the [icon] icon.

DOCUMENT MANAGEMENT

When reports are archived in Monarch Server, they are compressed and stored in their entirety. Users retrieving information from the report warehouse, however, may choose to retrieve portions of a report. These portions of reports are called documents. For example, a February music invoice report may contain invoices for dozens of different music stores. A user looking for the February invoice for only Betty's Music Store, however, needs to retrieve just that portion of the file. The invoice for Betty's Music Store can be represented as a single document in the stored February invoice report.

To configure stored information so that users can access it in this way, you need to define how you want to break out documents from the input reports. What makes up a document? In some cases, such as with a file of numerous invoices, the answer is easy: each invoice in the file is a separate document. For other reports, however, you may need input from users to determine how to define documents.

You categorize the documents you define as document types and then assign them to previously defined document groups. For each document type (e.g., Music Orders), you specify index fields (e.g., Customer Name) and then map them to the corresponding indexes in the assigned Monarch model file. You then configure a filing task and execute it via a filing process to archive the documents into the system. (A filing task uses the document type information to parse individual reports and index, compress and store them for later retrieval.) Lastly, you grant users access rights to the document types and security keywords, so that they can specify search criteria to retrieve documents.

The archiving process comprises eight steps, all performed within MSAdmin:

- Define a document group
- Define a document type
- Create index fields
- Map index fields to Monarch indexes
- Specify an auto-name string for the documents
- Define a filing task for the document type
- Schedule a filing process to run the filing task
- Assign user rights to view the document type

> **NOTES**
>
> Though the sequence of these tasks represents a logical progression, you do not have to follow their exact order.

About 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.)

There are three types of model files that can be utilized in Monarch Server:

❑ **Report Models**: A report model is a model file that contains field, filter, summary and chart definitions (as well as other settings), and which is automatically opened when associated documents are viewed. The primary purpose of the report model is to generate the Data View in MSClient.

> **NOTES**
>
> Though you can use a report model for your index model, a report model may contain a number of fields that are irrelevant for searching. These unnecessary fields will only slow down the document retrieval process. So, it would be better to create an index model that contains only the fields that will be used for document retrieval.

❑ **Index Models**: An index model is a special form of model file that, ideally, should only contain those fields that are to be used as index fields for a given document type. It defines the fields on which you want to index a document, and is used only during the archive process. Index models typically contain fewer fields than report models, thus speeding up the document retrieval process.

> **NOTES**
>
> When configuring a document type, you may utilize the same model file for your index and report models. It is not necessary to use a different model file for each of them.

❑ **Premining Models**: A premining model defines a premining scheme for the filing process (as part of archiving report data), and putting it into the MS database. The primary purpose of a premining model is to generate the Dynamic View in MSClient.

Removing a Model from a Document Type

When removing a model from a document type — whether it be a report, index or premining model — you need to specify a replacement model. (A document type cannot be saved without an assigned model.)

> **NOTES**
>
> You will also need to run a **Re-index** maintenance task to update the changes to a document type.

To remove a model from a document type

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types** to display the Document Types page.

2. Click the name of the document type you want to remove a model from or clicking anywhere on its row, and then click ✎ .

3. Click the **Index Models** button or the **Premining Models** button to display the **Select Model** page.

4. Select a new model.

5. To add a report model to the document type, drag its name from the **Available Report Models** pane to the **Assigned Report Models** pane.

6. To remove a report model from the document type, drag its name from the **Assigned Report Models** pane to the **Available Report Models** pane.

7. Click **Save** to save the changes.

Index Fields

An index field is a field within a document type that is used as an identifier. Document retrievals are based on these fields of information. For example, an index field for a purchase order could be **Purchase Order Number**, while index fields for employee records might be **Social Security Number** and **Employee Name**.

While an index field is a particular field within a document type, an index value (also called a *keyword value*) is a specific value of an index field. For example, **Q197-4112** could be an index value for a **Purchase Order Number** index field, and **123-45-6789** could be an index value for a **Social Security Number** index field.

Monarch Server uses index fields to locate and retrieve documents according to index values. For example, if a user entered an index value of **123-45-6789** for a **Social Security Number** index field, the index value is used to locate documents for the individual with this social security number.

The first step in creating index fields is to open a report in Monarch and create traps to extract the desired fields of information (for example, invoice numbers, customer names, ship dates, and so on). Then you save the index fields in a model file. (For detailed information on this process, consult the Altair documentation.) When adding a document type to the Monarch Server system, you assign Monarch Server index fields to it and specify which model file you want to associate with it. Then you map the Monarch Server index fields with the ones in the associated model file. Monarch Server users will then be able to use the index fields and values to retrieve documents from the report warehouse.

All indexes used in the system are listed on the Indexes page. To display this page, click **Content System** on the Navigation Tree, then click **Document Management** and select **Index Fields**.

Use this page to add, edit, remove indexes from the list, or import index fields from existing models.

It is possible to save the index fields' values (index values) in encrypted format using the **Encipher** option.

Also the **Enable index selection** option is available for index fields to enable or disable access to the index values in MSClient application.

Identifying Index Fields

The indexing process begins with the creation of an index model within Monarch, via the same field definition process that you would use to extract fields of data from a report (refer to the Altair documentation for detailed instructions on this process). When creating an index model to be used in Monarch Server Web, however, only those fields that are to be used as index fields need to be identified. When you configure a document type within Monarch Server, you will map these Monarch indexes to the document type's index fields.

Monarch Index Definition Considerations

When creating an index model within Monarch, consider doing the following:

❑ **Include only the fields you want to index**: The index model file should contain all the fields that you plan to map to index fields for the given document type in Monarch Server. It is not necessary to include other fields in the model — in fact, it is preferable that you do not include them. All fields contained in the model will be

extracted from the report as part of the archive process, so unused fields would be extracted unnecessarily. Keeping the number of fields to a minimum will speed up the archiving process.

❑ **Index fields should be natural fields**: Calculated fields should not be used as index fields unless they are derived from a natural field (that is, a field extracted from your reports).

❑ **Avoid page header templates**: Index fields cannot be derived from page header templates.

❑ **Use a detail-level template to access the Data View**: During the archive process, all fields in the index model will be used as index fields, regardless of their template level. You don't need or even necessarily want a detail-level template.

However, if you do not create a detail template, you will not be able to go to Data View. You may want to go to the Data View in order to gain access to the field properties for the index fields you have defined.

You can get around this problem in two ways. The first way is to create your lowest-level index field as a detail template, regardless of whether it is truly at the detail level in the report. The second way is to define a detail template temporarily, providing access to the Data View. You can then delete the detail-level model before saving the index model.

❑ **Match data type and check data length**: As part of the document type configuration process in Monarch Server, index fields are mapped to their corresponding Monarch indexes. In order to ensure proper operation, the data type (and field length, when applicable) of the Monarch Server Web index fields and Monarch indexes must coincide. For example, if in Monarch Server you create a string index field, and then you attempt to map it with a Monarch date index, the mapping will fail due to the incompatibility of their data types.

In addition, you should check that the defined length of the Monarch indexes is less than or equal to that of the corresponding index fields in Monarch Server Web. If they are longer, Monarch Server Web will truncate the index field's data when it is stored. This may cause errors during the archive process if, for example, an index field is no longer unique due to truncation.

❑ **Set the Ignore Leading Control Characters setting to zero**: Depending on the source of your report data, your report files may contain one or more extra characters at the beginning of each line. These characters are typically printer control codes that have no meaning to Monarch. Monarch provides a setting that allows you to strip a specific number of characters from your reports when they are viewed so that these characters do not interfere with report data.

If you supply a number greater than 0 for this setting in your Monarch index model, that number of characters will be stripped from the input report as it is compressed and archived in the warehouse. The characters are permanently removed. If the number is set to 0, no leading control characters are removed from your report. However, you may still choose to ignore those characters when viewing, by setting an appropriate value in the Monarch model file that is launched for viewing.

NOTES

In order to ensure that characters are not stripped from your report files inadvertently, it is recommended that the value be set to 0 for all Monarch index models.

To review or change the Ignore Leading Control Characters setting

1. In Monarch, open the desired report (**File**, **Open Report**) and model files (**File**, **Open Model**), then select **Options**, **Input** (ALT,O,I) from the main menu to display the **Input Options** dialog box.

2. Enter the appropriate number of leading control characters to ignore in the **Ignore n Leading Control Characters** field.

NOTES

It is recommended that you set this number to 0 for the index model.

3. Click **OK** to close the **Input Options** dialog box, then save the change to the model by selecting **File**, **Save Model**.

- Turn off the Ignore Form Feed Characters setting: Many report files use a form feed character to indicate the top of a new page. This is especially useful when breaking reports into documents if the Top of Page option is chosen. Monarch provides a setting that allows you to ignore form feed characters that are embedded in the report. Note: For most reports, it is recommended that the setting be unselected in the Monarch index model.

1. In Monarch, open the desired report (File, Open Report) and model files (File, Open Model), then select **Options**, **Input** (ALT,O,I) from the main menu to display the **Input Options** dialog.

2. If the **Ignore Form Feed Characters** check box is selected, clear it.

3. Click **OK** to close the **Input Options** dialog, then save the change to the model by selecting **File**, **Save Model**.

Monarch Server Web Index Field Considerations

A few things to consider before adding index fields in Monarch Server:

❑ Survey your user's requirements: The point of an index is to help users find documents in the report warehouse as quickly as possible, so you should be sure to index the fields that users are likely to use when looking up a particular type of document. In many cases, the selection of index fields is obvious. However, that is not always the case. The best way to ensure that you are meeting your user's requirements is to ask them. Take a copy of a representative document and ask users which fields they would want to use to find that document in a database.

❑ Choose unique identifiers: When selecting index fields, it is best to select the most unique identifiers in the document, such as Customer name, Social Security Number, Invoice Number, etc. You should not, in general, select fields that would return a large number of instances, like State, for example. You should also avoid using fields that may not have consistent input. For example, Bill or William in the First Name field could both refer to the same customer, making it difficult to locate all documents for that individual. The more unique the identifier, the more precise the lookup will be. These identifiers are often found as column heads, titles, or page headers. In Monarch terms, they are typically found at an Append level.

❑ Index only necessary search fields: In general, you should avoid indexing line item data. In Monarch terms, this means you should generally not index items that are at the Detail level. These index entries would significantly increase the size of the index and increase the length of time required for the system to search the index tables. In addition, having a lot of index entries means that the initial processing of the report will take longer.

Adding an Index Field

When configuring a document type, one of the steps is to map Monarch Server index fields with Monarch indexes. Before that, you need to configure index fields..

NOTES

When configuring an index field in Monarch Server, keep in mind that its data type (and, when applicable, its data length) must be compatible with the data type (and length, if applicable) of the Monarch index you plan to map it to. For more information, see Identifying Index Fields.

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Index Fields**.

2. Click ![+] on the **Index Fields** page. The **Index Field** page appears.

3. Enter a unique name of a new index field in the **Name** field. As the name is only reference identification, an index name may be changed without effect to indexed data.

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

5. Select index field data type:

   - String: If you select this option, the String data type is defined. In this case type the number of characters in the Length box to set the maximum length of string fields. It is important to make the field length for string data long enough to accommodate the largest possible value.

   - Date: If you select this option, the Date data type is defined.

   - Number: If you select this option, the Number data type is defined. In this case type the number of digits after the decimal point in the Decimals box to set the maximum number of digits after the decimal point.

6. Select **Enable index selection** to enable selection of index values in **Select Index Value** dialog boxes in the MSClient and MSAdmin applications.

7. Select **Enable cross-references table** to be able to use a cross-reference table when index searching for documents.

8. Select **Apply wildcards index field search values on search to replace embedded space(s)** to add the ability to automatically add wildcard(s) to Document Search index search criteria. For example, the client's accounts will show both "XX XXXXX" or "XXXXXXX". The the index field is stored with the spaces but some users enter the spaces and some do not so the system needs to replace the space with * to make it an automatic wildcard.

9. Select **Enciphered** to enable storing index values as an encrypted data. By default, they will not be displayed in **Select Index Value** dialog boxes.

> **NOTES**
>
> Extended Security option only.

10. Select **Enable dynamic search** to enable the auto-suggest feature for this index field in MSClient.

11. To save the index field, click the **Save button**.
    The system saves the new index to the database and displays the updated **Index Fields** page, if the operation is completed successfully.

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

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

Editing an Index Field

Index Fields can be edited via the **Index Field** page.

To edit an index in the list

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Index Fields**.

2. On the Index Fields page click the name of the index you want to edit or click anywhere on its row, and then click ![edit].
   The **Index Field** page appears. For more information on how to change index options, see Adding an Index Field.

3. To save the changes, click the **Save** button.
   The system saves the modified index to the database and displays the updated **Index Fields** page, if the operation is completed successfully.

Deleting an Index Field

You can delete an <u>index field</u> via the Index Fields page.

To delete an index from the list

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Index Fields**.

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

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

Importing an Index Field

To import an index field

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Index Fields**.

2. Click the **Import Fields** button on the Index Fields page. The **Select Model** box appears.

3. Select a model you want to use for importing, by clicking its name.

4. The **Import From Model** dialog box appears, displaying the following items:

   - **Import**: Select an index, if you want to add it to the index fields.

   - **Name**: Names of index fields from the selected model.

   - **Type**: The type of each index field (for example, string, date or number).

   - **Size**: The length of each string and number index field.

   - **Encipher**: This option allows to keep index values in encrypted format and hide field values in Select Index Value dialog boxes.

   - **Enable index selection**: The option enables selection of index values in Select Index Value dialog boxes.

   - **Save**: Imports and saves indexes to database.

   - **Cancel**: Closes the window.

   - **Select All**: Selects all indexes.

   - **Select None**: Clears all indexes.

5. Select model fields to import as index fields and click **Save**. If an index field name already exists in the database, the row will appear shaded. The system imports and saves indexes in the database and displays the updated **Index Fields** page with them, if the operation is completed successfully.

Mapping Index Fields to Monarch Indexes

When <u>adding a document type</u>, one of the steps you must perform is to map the assigned <u>index fields</u> to the indexes in the Monarch <u>model</u>. Mapping Monarch Server index fields to indexes in the Monarch model enables you to use the index fields (and their associated index values) to retrieve data from a report.

NOTES

Before you can map index fields to Monarch indexes, you need to specify an index model in the **Index Model Name** box on the <u>Document Type page</u>.

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Either click ➕ to create a new document type, or click the name of a document type that you want to do mapping for.

3. Click the **Mapping** header to expand a hidden section with the following items:

   - **Available Index Fields**: Select an index to assign to the current document type from the list.

   - **Monarch Indexes**: Select a corresponding Monarch index (keyword type) for the current document type.

   - **Add To Map**: Click this button to add a selected index field and a corresponding keyword type to the map list. It allows mapping an index field with a corresponding Monarch index (keyword type).

   - **Add To Map Hidden**: The same as Add To Map, except that the hidden index field will not be available to users in Simple and Advanced Searches. This feature can be used to add indexes to document types that are used to define security keywords, but are not visible to users.

   - **Auto Map**: Click this button to automatically map all available indexes to Monarch indexes (keyword types).

   - **Map List**: Displays the list of index fields and corresponding Monarch indexes (keyword types).

   NOTES

   To remove a mapped entry (a pair — an index field with a Monarch index) from the map list, click 🗑 .

4. Map as many index fields to Monarch indexes as you want to, then click **Save**.

Default Index Values

You can have a default index value automatically assigned to each document in a report file. A default index value is a value you specify for an index field that does not occur within a given report. A default index value, therefore, will not change from document to document in a given report file. Typically, you would use a default index value as a document indicator, much in the same way as a "stamp" for a document. A default index value is automatically assigned to each document during the archive process.

   NOTES

   The use of default index values is optional.

For example, let's say you have 10 report files coming in every month, each one containing the sales information of one of 10 different sales regions. The region number does not appear in the report, but you would like that information to be associated with each document. You could create an index field called **Region Number** and assign it to the document type. As reports for each region are processed, the appropriate value for region number would be assigned to each of the report files as a default index value. All documents generated from this report file will have the default index value assigned to them. You can use default index values as search criteria, as if they were ordinary index values. Thus if you searched for information about Region 3, all the documents in the report file could be part of the search results.

To specify a default index value

1. Create a new index field (for which you'll subsequently specify the default value, see step 3 below).

2. [Assign the index field to the appropriate document type](#)

3. [Configure a filing task](#) to archive the document type into the report warehouse. When scheduling the filing task, on the **Filing Task** page, click the **Index Defaults** tab at the top of the page to display the **Edit Index Defaults** page, then fill in the boxes.

4. [Run the filing task](#).

Document Groups

A document type group (or simply a [document group](#)) is a classification of [document types](#) according to some common characteristic or subject. You could, for example, decide to group different kinds of financial reports into a single document group. Each document group, then, contains one or more document types. A document type is defined by its layout or structure. An invoice, for example, is a document type.

Documents are classified in document groups as a means of organizing information hierarchically and thus speeding up the search process. In other words, when users perform a search, they typically select a document group first, and then select a document type or types from that group to search.

In addition, all document types are assigned to [storage groups](#). The storage group you select during configuration is a default storage group. You can assign document types in the same document group to different storage groups. You would take this approach, for example, if you do not want to treat all the document types in the same way.

Adding a Document Group

When [configuring a document type](#), you must assign it to a [document group](#). So before configuring the first document type, you need to configure a document group.

> **NOTES**
>
> Adding a document group is one step in the process of [archiving reports](#).

To add a document group to the list

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Groups**.

2. Click ➕ on the Document Groups page. The Document Group page containing the following items appears:

   - **Document Group Name**: Enter a unique name of a new document group.

   - **Description**: Optionally, enter any text to describe the document group.

   - **Available Document Types**: Contains the list of the document types, from which an administrator selects those to be assigned to the current document group. To add a document type, drag it from the left pane to the right pane.

   - **Assigned Document Types**: Displays the document types selected by an administrator for the current document group. To remove a document type, drag it from the right pane to the left pane.

   - **Filter by**: The filters for the Available Document Types list and Assigned Document Types list. Type a document type name (or a part of it), and click Apply to filter the list.

   - **Save**: Saves a new or existing document group.

   - **Clear**: Clears all the boxes.

   - **Cancel**: Cancels the operation.

3. Fill in the boxes of the page and click **Save**. The system saves the new document group to the database.

Editing a Document Group

Document Groups can be edited via the Document Group page.

To edit a Document Group

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Groups**.

2. On the Document Groups page do one of the following:

   • Click the name of the document group you want to change.

   • Select the document group, by clicking anywhere on the row, and then click .

   The Document Group page appears. For details about how to change its items refer to Adding a Document Group.

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

Deleting a Document Group

You can delete a document group via the Document Groups page.

To delete a document group

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Groups**.

2. Do one of the following:

   • Select the document group you want to delete, by clicking anywhere on the row, and then click .

   • Click at the end of the row with the document group you want to delete.

   A dialog box appears.

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

Document Types

A document type is defined by its layout or structure. An invoice is an example of a document type. All instances of a document type display the same types of information using the same format, though the actual data can vary. For example, Mary's invoice may contain 3 line items, while John's invoice — 11. Both invoices, however, contain index fields for an invoice number, invoice date, and customer name, located in the same relative positions.

All document types used in the system are listed on the Document Types page. To display this page, click **Content System** on the Navigation Tree, then click **Document Management** and select **Document Types**.

Use this page to add, edit, duplicate, or remove a document type from the list.

Adding a Document Type

Adding a document type is one step in the process of archiving reports.

To add a document type

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Click ✚ on the **Document Types** page. The **Document Type** page appears.

3. **Document Type Name**: Enter a unique name of a new document type.

4. **Description**: Optionally, enter a description of the new document type.

5. **Character encoding**: Select the character set encoding for the current document type (for example, ASCII). If you select the **Default** value then character encoding specified for the index model will be used.

> **NOTES**
>
> Changing this value after reports have been filed will not change their input encoding. In order to correctly file reports with an incorrect encoding, you need to delete the existing incorrect reports by a maintenance task, and re-file the original reports into Monarch Server.

6. **Exclude this Document Type from searches**: Select this box to make the document type unavailable for client viewing. Typically, this is used in conjunction with a separate pre-mined document type. The hidden document type will only be used as a data-join source in **Dynamic View**. This is a user-search setting and may be changed without effect to stored documents.

7. **Allow searches by document dates**: In some cases, document dates for user searching may be defined by an index field (e.g. **Report Date** or **Run Date**). In this case the document date fields are redundant and may be hidden. Document dates are still stored and are valid for maintenance operations. This is a user-search setting and may be changed without effect to stored documents.

8. **Request filter before initial Table/Summary view**: In case of reports with a large number of data rows, it may be more efficient to request the user to set view options before the data is displayed. The default action is to display the data before allowing the user to set view parameters. This is a user-search setting and may be changed without effect to stored documents.

9. **Assign preceding values to documents not containing append/page values**: When defining a document type to break the report into logical sections (documents), it is expected that each document will contain at least one case of each defined index field. However, there may be cases where an index value occurs only in the beginning of a report or at certain points that are prior to the document breaking point. In this case, a document can be assigned the preceding value, if it does not contain the value.

10. **Document Group**: Select one document group for the document type to be a member of. Changing this value will associate all reports of this document type to the current document groups assignment.

11. **Storage Group**: Select from the list a storage group for the document type. If you change it, filed reports will remain in the previously defined storage group, while new filings will be stored in the newly defined storage group. Changing a storage group assignment does not affect the ability to search for, or retrieve reports in multiple storage groups.

12. **Document State Group**: Select one document state group for the document type. Changing this value will associate all reports of this document type to the current document state group assignment.

13. **Index Model Name**: Specify the name for an index model. Click the **Index Models** button on the right to display the list of existing index models. Specifying an index model is necessary for defining document break conditions.

14. **Premining Model Name**: Specify the name of a premining model. Click the **Premining Models** button on the right to display the list of existing models. Defining a premining model is necessary, if you want to use a premining scheme for the filing process.

15. **Choose Indexed Fields**: This button allows you to select indexes for a premining model. This is an advanced function included for potential performance reasons only. It is recommended that no pre-mine column indexes be selected initially. This button is enabled only when you add a document type. Changing pre-mine indexes after document type definition is accomplished via Maintenance Tasks/Processes.

16. **Available Report Models**: Contains available report models you can select from.

17. **Assigned Report Models**: Contains report models you select from the available ones. To assign a report model to the document type, drag it from the left pane to the right pane. To de-assign a report model from the document type, drag it to the left pane.

18. **Break At ... line #:** Specify document break fields. You may select one of the following options from the list:

- **Top of current page**: If you select this value, the system breaks the report at the top of the page, on which the break value occurs.

- **Break On Line and Line #** (Line # being an offset value): If you select this option, Monarch Server breaks the report on the line where the field break value occurs. The Line # field allows you to specify where you want the document breaks to occur in relation to the break field.
  For example, if your report is a list of sales by state, you might want to break out a new document whenever a new state is encountered. To do so, you would choose the Break On Line option, enter a value of 0 (zero) in the Line # field (a value of zero means that there is no offset), select Value Change from the Break When

list, then select State from the list of fields. Whenever a change in the state is encountered in the report, a new document is broken out and a new state becomes the first line of that document.

NOTES

Negative values are not permitted in the **Line #** field.

19. **Break When:** Select one of the following options from the list:

   - **Always**: Select if you want a new document to begin whenever the break field is encountered, regardless of whether there has been a change in its value. For example, if you specify the Customer break field, and the report contains three invoices for the same customer, then the report will be broken into three documents, even though the customer on each invoice is the same.

   - **Never**: Select if you don't want the report to be broken into separate documents. You might select this option if the report contains a small amount of information that doesn't need to be broken into documents (for example, an invoice report that contains only one invoice).

   - **Value Change**: Select if you want a new document to begin whenever the break field value changes. For example, if you specify the Customer break field, and the report contains one invoice for three different customers, then the report will be broken into three documents, one for each customer.

20. **Page header rows**: Optionally, specify in this field the number of page header lines that will be inserted in **Document Search** views, when the Document Break does not occur at the beginning of a printed page. The field is enabled only when **Break On Line** is selected. This setting does not alter the source report and may be changed without effect to filed reports. The display effect is in **Document Search** views only. Set this value to **0**, if the header is not required.

21. **Mapping**: Click this header to expand a hidden section with the following items:

   - **Available Index Fields**: Select an index to assign to the current document type from the list.

   - **Monarch Indexes**: Select a corresponding Monarch index (keyword type) for the current document type.

   - **Add To Map**: Click this button to add a selected index field and a corresponding keyword type to the map list. It allows mapping an index field with a corresponding Monarch index (keyword type).

   - **Add To Map Hidden**: The same as Add To Map, except that the hidden index field will not be available to users in Simple and Advanced Searches. This feature can be used to add indexes to document types that are used to define security keywords, but are not visible to users.

   - **Auto Map**: Click this button to automatically map all available indexes to Monarch indexes (keyword types).

NOTES

Before mapping indexes you should select the Index Model and add indexes to the **Assigned Indexes** box on the Document Type page.

22. **Map List**: Displays the list of index fields and corresponding Monarch indexes (keyword types). To remove a mapped entry (a pair — an index field with a Monarch index) from the map list, click 🗑 .

23. **Auto Name**: Allows you to set document names based on any combination of indexes and document identifiers. Click the **AutoName** button to open the **Auto-Name** dialog box that automatically creates an auto-name format.

24. **Report Name**: Allows you to set report names based on any combination of indexes and document identifiers. Click the **ReportName** button to open the **Report-Name** dialog box that automatically creates a report-name format (in the same way as Auto Name).

25. **Document Date**: Set the document date to display:

- **Last write time**: Select, to use the Last Modified date of file properties as a Document Date.

- **Index value**: Select, to map a date type Monarch field to Document Date. From the enabled list of the date type index fields available in the defined index model, select the field you want to use the date from.

NOTES

If the selected date type index field doesn't exist in report, **Last write time** is used as a Document Date. If the selected date type index field contains more than one value, the first field value is used as a Document Date.

26. **Save**: Saves a document type.

27. **Clear**: Clears all the boxes.

28. **Cancel**: Cancels the operation.

29. **Duplicate**: Opens the **Copy Document Type** dialog box, where you can select a document type. All boxes will be filled with values of the selected document type. You can make the necessary changes.

30. Fill in the boxes of the page and click **Save**. The system saves the new document type to the database and displays the updated Document Types page, if the operation is completed successfully.

NOTES

You can specify other settings for a document type, including access rights to users, templates, report instances, report security rules, views available in the document search results page, PDF print settings and digital signature for a document type. The corresponding tabs appear on the Document Type page after you save a new document type and open it for editing.

Assigning Document Types to Roles, User Groups and Users

After you configure and save a document type, you can assign it to roles, user groups and users. When you do so, you enable the role members, group members and users to retrieve documents of that type.

When assigning a document type, keep in mind that rights in Monarch Server are cumulative. If, for example, you assign a document type to a role, any user assigned to that role will be able to retrieve documents of that type.

To assign a document type to roles, user groups and users

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**. The **Document Types** page is displayed.

2. Click the name of a document type or click anywhere on its row, and then click .

3. Select the **Rights** tab.

4. **Important**: To make a document type to be available to all users, select **Global** check box 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 document type. To select a user group, drag it from the left pane to the right pane.

6. Click **Roles** to expand a hidden section.
   Select roles that you want to have access to the document type. To select a role, drag it from the left pane to the right pane.

7. In the **Users** section you can select users that you want to have access to the document type.
   To select a user, drag their name from the left pane to the right pane.

> **NOTES**
>
> If you don't want a user to retrieve any documents of a particular document type, drag a role, user group, or user from the right pane to the left pane.

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

9. To clear the changes, click the **Clear** button.

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

Assigning Document Types to Maintenance Tasks

When adding or editing a maintenance task, you need to specify, which document types you want the task to affect.

To assign a document type to a maintenance task

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Maintenance Tasks** to display the **Maintenance Tasks** page.

2. Create a new maintenance task (by clicking ✛), or select an existing maintenance task (by clicking its name, or by clicking anywhere on the row and then clicking ✎).

3. Click the **Document Types** header to expand a hidden section.

4. In the **Document Groups** list, select a document group that contains the desired document type. All document types assigned to the selected document group appear in the **Document Types** pane.

5. In the **Document Types** pane, choose the document types that you want to assign to the task. To add a document type, drag it to the **Assigned Document Types** pane.

6. Click **Save** to save the changes.

Editing a Document Type

To edit a document type

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Click the name of the document type you want to change or click anywhere on the row, and then click ✎ . The **Document Type** page appears. For details about how to change its items see Adding a Document Type. When you open a saved document type for editing, the following additional tabs become available on the Document type page:

   - **Rights** tab is used to assign the document type to appropriate roles, user groups and users.

   - **Templates** tab is used to manage templates for document types.

   - **Report Instances** tab is used to manage report instances for document types.

   - **Report Security** tab is used to manage report security rules for document types.

   - **Available Views** tab is used to manage views that will be available to a user working with a document type.

- **PDF Print Settings** tab is used to manage user's print settings for a document type. If not defined, the default system settings will be applied.

- **Excel Digital Signature** tab is used to add a digital signature to Excel exports. This guarantees that the data provided to a user is not modified.

3. Make the necessary changes and click **Save**. The system saves the modified document type to the database and displays the updated Document Types page, if the operation is completed successfully.

Duplicating a Document Type

When creating a new document type, you can save time by duplicating an existing document type with similar parameters.

To duplicate a document type

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the **Document Types** page click ➕ .

3. Click the **Duplicate** button at the bottom of the page. The **Copy Document Type** dialog box appears.

4. Click the document type that you want to duplicate. All boxes will be filled with values of the selected document type, except for the **Document Type Name** and **Description**.

5. Enter the name and description (optional) of a new document type, make the necessary changes to other boxes and click **Save**. For details about how to fill in the page items refer to Adding a Document Type.

Deleting a Document Type

To delete a document type

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Click ✖ at the end of the row with the document type you want to delete.

3. Click **Delete** to delete the document type from the list.

Identifying Document Break Fields

Document break fields are index fields that are used to logically divide reports into documents. As a result, even though entire reports are stored in the warehouse, users are able to retrieve individual documents from within them when performing a search.

Typically, the creator of the original report has set up the document in a way that can help you identify break fields. Reports are generally organized according to some type of sorting criteria. For instance, you might have an employee listing broken out by department within each regional office. Each department could be treated as a separate document. Document breaks do not have to appear on page boundaries. They may occur anywhere within a report file.

You need to identify the criteria used to organize a report and then determine a suitable break field for the report. Here are some specific tips regarding break fields:

❑ Imagine the report being cut apart with scissors. This is the effect of a break field. If a header appears only once on a page and you break that page into more than one document, only the first document from that page will have the header included. You cannot duplicate header information from the report across multiple documents.

❑ Look for lines that provide numerical subtotals. You should be sure to include in a single document all the previous lines that contribute to that subtotal, along with the subtotal line itself.

❑ Consider how page boundaries affect your document breaks. You do not need to be limited by them, but many reports will issue a top-of-page command before beginning a new sort field.

❑ Break the report into subsections that stand alone and "make sense".

❑ Consider how users will be working with the documents. If users always want to look at an office location in its entirety, then it makes no sense to break out documents by department.

❑ Decide how duplicate consecutive break field values should be handled. If you have a report that contains invoices, for example, you might have 3 or 4 invoices in a row for the same customer. How should that situation be handled? Do your users want to see all invoices for the customer as one single document, or do they want each invoice as a separate document? Either option is available. The user's needs will dictate the appropriate solution.

Once you have identified which field in a report you want to break on, you're ready to break the report into separate documents by specifying a document break field. A document break field creates only virtual breaks in a report. The report is still stored in its entirety, but the document break allows the users to retrieve only portions of the report (documents).

NOTES

Specifying a document break field is part of the document type configuration process.

Auto-naming documents

With Monarch Server's auto name feature you can automatically assign names, based on any combination of index fields and document identifiers, to documents filed into the system. It is important to provide meaningful names for documents (that is, names that identify the kind of data the documents contain).

NOTES

Before assigning an auto-naming scheme, you need to select an index model and add indexes to the map in the **Mapping** section on the Document Type page.

To auto-name a document

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Click ✚ to add a new document type, or open an existing document type by clicking its name.

3. Click the **AutoName** button at the bottom of a page to display the Auto Name window.
   The **Auto-Name String** field will display auto name macros after you select them by clicking corresponding buttons at the bottom of the page.

4. Build the auto-name string by clicking any combination of the following buttons:

   - **Space**: Adds a space, a hyphen, and another space (-) between two values in the auto-name string.

   - **Document Type**: Adds the document type macro ([DOCTYPE]) to the auto-name string.

   - **Document Dates**: Adds the document date macro ([DOCDATE]) to the auto-name string.

   - **Document Time**: Adds the document time macro ([DOCTIME]) to the auto-name string.

   - **Date of Filing**: Adds the filing date macro ([FILINGDATE]) to the auto-name string.

   - **Time of Filing**: Adds the filing time macro ([FILINGTIME]) to the auto-name string.

   - **File Name**: Adds the file name macro ([FNE <element number>/<delimeter>]) to the auto-name string. For example, if you specify the element number as 1 and the delimiter as a period (.), then the first element of the file name before the period will be included in the auto-name string.

- **Index**: Adds an index macro (for example, [INDEX 108.2]) to the auto-name string for the index selected in the Index list.

> **NOTES**
>
> Before you click this button, select an index field from the **Index** drop-down list, then enter the number of repeat indexes to add to the auto-name string in the **Repeat** field. To include all values of this index field, enter **A** in the **Repeat** field. In the index macro, the first number is the ID number that was automatically assigned to the index field when it was created. The number (or letter, for example, **A**) following the colon is the number you entered in the **Repeat** field.

5. Enter any static text that you would like to appear in the auto-name string.

6. Click **Save** to save the auto-name string settings and close the Auto Name window.

7. To save the change to the document type, click the **Save** button on the Document Types page.

> **NOTES**
>
> A dialog may appear, asking whether you want to rename any documents that have already been stored using this new name. Select Yes to rename existing documents, or No to just use this name for new documents as they are added.

Example of using the auto name feature

To auto name documents of a Checking Statement document type in the following format:

        Checking Statement - Thomas T. Edwards, 12/11/97

Perform the following steps in the **Auto Name** window:

1. Click the Document **Type** button. `[DOCTYPE]` appears in the **Auto-Name String** field.

2. Click the **Space** button. A space, hyphen, space (-) appears in the **Auto-Name String** field after `[DOCTYPE]`.

3. Select **Customer Name** from the **Index** drop-down list, enter **1** in the **Repeat** field, then click the **Index** button. `[INDEX 100.1]` appears in the **Auto-Name String** field after the space, hyphen, space (-).

4. Type a comma (**,**) in the **Auto-Name String** field after `[INDEX 100.1]`.

5. Using the spacebar on your keyboard, enter a space in the **Auto-Name String** field after the comma.

6. Click the **Document Date** button. `[DOCDATE]` appears in the **Auto-Name String** field after the space.

The completed string in the **Auto-Name String** field reads: `[DOCTYPE] – [INDEX 100.1], [DOCDATE]`

Managing Document Type Templates

Monarch Server users can apply templates to documents when exporting them. All document templates used in the system are listed on the Templates page.

> **NOTES**

Each template type is available only under the appropriate license.

User can manage document type templates (add, edit, or remove) on the Document Type Templates page.

To display the Templates page

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the **Templates** tab.

Adding a Template to a Document Type

After you assign template to a document type you can assign this document type and template to a Monarch Server user. The user will be able to retrieve documents of this type and apply the specified template to documents when exporting them.

To add a template

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page, do one of the following:

    - Click the name of the document type you want to add a template to.

    - Select the document type, by clicking anywhere on the row, and then click

3. On the displayed page, select the **Templates**.

4. Click the **Add** icon (+). The Template page containing the following items is displayed:

    - **Name**: The name of a new document template is assigned automatically depending on the selected Template file.

    - **Type**: Allows you to select the type of a document template. The type is defined by an application, which will be used for document export.

    - **Model**: This field becomes available, if you select ES Style from the Type list. You can select the model type, which is used for extracting data for ES Style. At the customer site, the report model for XSL presentation is optimized for extraction and cannot be used for analysis.

    - **Template file**: Select Template file, which will be used for document export.

    If you select **ES Style** or **ES Report Style** in the **Type** list, the following options become available:

    - **PDF page type**: Select the print size of PDF page from the list.

    - **Orientation**: Select PDF page orientation (Portrait or Landscape).

    - **PDF page width (inches)**: Specify PDF page width.

    - **PDF page height (inches)**: Specify PDF page height.

    - **Left margin (inches)**: Specify PDF page left margin.

    - **Right margin (inches)**: Specify PDF page right margin.

    - **Top margin (inches)**: Specify PDF page top margin.

    - **Bottom margin (inches)**: Specify PDF page bottom margin.

    - **Server XML/XSL conversion**: Select this checkbox to use server XML/XSL conversion.

    - **Enable formatting**: Select this checkbox to enable formatting for templates from user preferences.

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

NOTES

You can assign document type templates to user groups, roles or users via the **Template Rights** tab that is available only for existing templates. For more details see Editing a Template.

Editing a Template of a Document Type

To edit a document template

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page, do one of the following:

   - Click the name of the document type you want to edit a template for.

   - Select the document type, by clicking anywhere on the row, and then click   .

3. On the displayed page, select the **Templates** tab at the top of the page.

4. Do one of the following:

   - Click the name of the template you want to edit.

   - Select the template, by clicking anywhere on the row, and then click   .

   The Template page appears. For details about how to change its items see Adding a Template.

5. Make the necessary changes.

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

Deleting a Template from a Document Type

To delete a document template

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page, do one of the following:

   - Click the name of the document type you want to delete a template from.

   - Select the document type, by clicking anywhere on the row, and then click

   The Document Type page appears.

3. Select the **Templates** tab at the top of the page.

4. Do one of the following:

   - Select the template you want to delete, by clicking anywhere on the row, and then click   .

   - Click   at the end of the row with the template you want to delete.

   A dialog box appears.

5. Click **Delete** to delete the template from the list.

Report Instances

All reports of the current document type are listed on the Report Instances page.

To display the Report Instances page

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the Report Instances tab.

   The Report Instances page displays the list of reports in the system, including the following information:

   - Premined (check marks indicate premined reports)

   - Blocked (check marks indicate blocked reports)

   - Report file name

   - Report Date

   - Filing Date

   - Working (check marks indicate working reports)

   - Original (check marks indicate original reports)

   Use this page to edit a description of existing report, remove it from the list, or block all reports.

Editing a Report Instance

To edit a report description

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page, do one of the following:

   - Click the name of the document type you want to edit a report for.

   - Select the document type, by clicking anywhere on the row, and then click .

   The Document Type page appears.

3. Select the **Report Instances** tab at the top of the page.

4. Do one of the following:

   - Click the name of the report file you want to edit.

   - Select the report file, by clicking anywhere on the row, and then click .

   The Report Instance page appears.

5. Make the necessary changes (change the date, or select the **Blocked** check box), and click **Save**.

The system saves the modified report description to the database and displays the updated Report Instances page, if the operation is completed successfully.

Deleting a Report Instance

To delete a report

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page, do one of the following:

   - Click the name of the document type you want to delete a report for.

- Select the document type by clicking anywhere on the row, and then click .

The Document Type page appears.

3. Select the **Report Instances** tab at the top of the page.

4. Select the report file by clicking anywhere on the row and then click:

- — To remove only a working report and unique dependent objects such as index values, annotations, discussion threads, etc.

- — To remove a working report, an archived original report, and unique dependent objects such as index values, annotations, discussion threads, etc.

NOTES

The associated filing result records are not removed in any case.

A dialog box appears.

5. Click **Delete** to delete the report from the list.

Blocking Report Instances

You can block all report instances via the **Report Instances** tab, so that reports cannot be searched for or viewed by non-admin users in MSClient.

To block all reports

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page, do one of the following:

- Click the name of the document type you want to block reports for.

- Select the document type by clicking anywhere on the row, and then click .

The Document Type page appears.

3. Select the **Report Instances** tab at the top of the page.

4. Click to block all reports. Check marks will appear in the **Blocked** column of the table.

NOTES

To unblock all reports, click . Users in MSClient will be able to search for and view the reports.

Report Security Rules

MS administrators can apply report security rules to reports when users view them in MSClient. The whole report is divided into two parts: "secure" areas of report which can only be seen by users with explicitly granted access rights (branch level) and "non-secure" areas which can be seen by all users who have access to the document type. Report-level security works in parallel with document-level security (security keywords).

Report Security rules allow sections of reports and report data to be hidden from user's view unless access is allowed. By default, users will not have access to hidden sections of reports unless specifically allowed to access the rule (see Rule Rights).

Rules must be defined before reports are filed. If a rule is defined or redefined after reports are filed, a **Re-index** maintenance task must be performed on all affected reports.

All report security rules used in the system are listed on the Report Security page.

To display the Report Security page

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the **Report Security** tab.

   The **Report Security** tab displays the list of report security rules assigned to a document type. Use this page to add, edit, or remove a rule from the list.

Adding a Report Security Rule

To add a report security rule

To add a report security rule

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Select the name of the document type you want to add a rule to by clicking the name of the document type or click anywhere on the row, and then click ✏ .

3. Select the **Report Security** tab at the top of the page.

4. Click ➕ to display the **Security Rule** page.

5. Modify the settings accordingly.

   Report Security Rule:

   - **Model name**: Shows the current index model.
   - **Depends on field**: Select a model field from the list.

   Starting Rule: This allows you to define the starting point of the rule being added.

   - **Start At**: This refers to the portion of the report on which the security rule is first applied. The following options are available:

     ♦ **Top of Current Page**: The rule is first applied at the beginning of the current page.

        Example:

        A report contains 50 lines of text. The rule begins on the first line of the report, i.e., the top portion of the page.

     ♦ **On Line**: The rule is first applied on the line specified by the user.

        o **Line #**: This field is enabled only when the On Line option is selected in the Start At list.

        o **On field change**: Specify a Monarch field for triggering the rule.

           Example:

           A report contains 50 lines of text with the following fields available: Customer, Account Number, Contact, Quantity, Description, etc.

If you wish to hide the Account Number information specifically, set the **On field change** to "Account Number," and then set **line #** field to 0. The rule is first applied to the field labeled as "Account Number."

If you wish to hide, for example, the third line from the field "Contact," then set the **On field change** to "Contact," and then set **line #** to 3. The rule is first applied to the third line from the "Contact" field.

Note that all fields available in the report are listed in the drop-down menu of **On field change**.

Ending Rule: This allows you to define the end point of the rule being added. The following options are available.

- **End At**: This refers to the portion of the report on which the security rule is last applied. The following options are available:

  - **End of Current Page**: The rule is last applied at the end of the current page.

    Example:

    In the previous example, you applied the rule to the Account Number field.

    If you wish to hide all suceeding information, set the **On field change** to **End of Current Page**. The report will no longer show information following the Account Number field.

  - **On Line**: The rule is last applied on the line specified by the user.

    - **Line #**: Specify a line offset for the On Line options. This field is enabled only when On Line option is selected in the End At list.

    - **On field change**: Specify a Monarch field for triggering the rule.

      Example:

      If you wish to hide all information provided before a certain field, for example, the Contact field, then set the **On field change** to "Contact," and then set **line #** field to 0. The rule is last applied to the field labeled as "Contact."

      If you wish to hide, for example, the third line after the "Contact" field, then set the **On field change** to "Contact," and then set **line #** to 3. The rule is last applied to the third line from the "Contact" field.

**Section Limit**: Describe the section limits.

- **Limit section to**: Specify how to limit the section.
  The options are: **No limit**, **Amount of lines** and **End of Current Page**.

  - **Amount of lines**: Specify the amount of lines for the Amount of lines option.
    This field is enabled only when the Amount of lines option is selected in the Limit section to list.

6. To save the new report security rule, click the **Save button**.
   The system saves the new report security rule to the database and displays the updated **Report Security** page, if the operation is completed successfully.

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

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

Editing a Report Security Rule

To edit a report security rule

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Do one of the following:

   - Click the name of a document type, to which the rule is assigned.

   - Select the document type, by clicking anywhere on the row, and then click .

3. Select the **Report Security** tab at the top of the page.

4. Do one of the following:

    - Click the name of a rule that you want to change.

    - Select the rule, by clicking anywhere on the row, and then click ✏ .

    The Security Rule page appears.

5. Make the necessary changes.

6. To set trustees for the report security rule, click the **Rule Rights** tab.

7. Click the **User Groups** or **Roles** heading to expand hidden sections. To assign a report security rule to a user group, role, or user, drag the appropriate trustees from the left pane to the right pane.

> **NOTES**
>
> The Security Rule page has the **Rule Rights** tab only for existing rules.

8. Click **Save**. The Security Rule page appears.

9. Click **Save**. The system saves the modified rule to the database and displays the updated Report Security page, if the operation is completed successfully.

Deleting a Report Security Rule

To delete a rule

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page do one of the following:

    - Click the name of the document type you want to delete a report for.

    - Select the document type by clicking anywhere on the row, and then click ✏ .

    The Document Type page appears.

3. Select the **Report Security** tab at the top of the page.

4. Do one of the following:

    - Select the rule you want to delete, by clicking anywhere on the row, and then click ✖ .

    - Click ✖ at the end of the row with the rule you want to delete.

    A dialog box appears.

5. Click **Delete** to delete the rule from the list.

Hyperlinks

Values in all character and numeric detail cells in selected Dynamic View columns can have defined hyperlinks to query MES and other systems to display additional information in a new window.

All hyperlinks of the current document type are listed on the Hyperlinks page.

> **NOTES**
>
> The **Hyperlink** tab is displayed only if a premining model name is defined for the current document type.

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the **Hyperlink** tab.

    The **Hyperlink** tab displays the list of hyperlinks assigned to a document type. Use this page to <u>add</u>, <u>edit</u>, or <u>remove</u> a hyperlink from the list.

Adding a Hyperlink

To add a hyperlink

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Click the name of the document type you want to add a hyperlink to or click anywhere on the row, and then click ✏ .

3. Select the **Hyperlink** tab at the top of the page.

4. Click ➕ to display the Hyperlink page.

5. Make changes to the following items:

    a. **Model name**: Shows the current index model.

    b. **Field Name**: Select a field name from the list.

    c. **Hyperlink Type**: Select the hyperlink type:

        ◆ **Inner Document**: Select to link to the most recent single Document of the specified Document Type where the Index Value is equal to the cell value from the hyperlink.

        ◆ **External Link**: Select a model field from the list.

    d. **Connected Document Type**: The option becomes available if you select the **Inner Document** hyperlink type. Select a connected document type to search.

    e. **Connected Index Field**: The option becomes available if you select the **Inner Document** hyperlink type. Select a connected index field to use.

    f. **Url Template**: The option becomes available if you select the **External Link** hyperlink type. Define a URL template for the link.

    g. **Test Value**: The option becomes available if you select the **External Link** hyperlink type. Enter a value you want to test. The field is not required.

    h. **Preview**: The option becomes available if you select the **External Link** hyperlink type. Click, to preview the result in a new window.

6. **Save**: Saves the hyperlink. If the operation is finished successfully, the system displays the Document Type page.

7. **Clear**: Clears all the fields.

8. **Cancel**: Cancels the operation.

Editing a Hyperlink

To edit a hyperlink

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Do one of the following:

   - Click the name of a document type, to which the hyperlink is assigned.

   - Select the document type, by clicking anywhere on the row, and then click ✎ .

3. Select the **Hyperlink** tab at the top of the page.

4. Do one of the following:

   - Click the name of a hyperlink that you want to change.

   - Select the hyperlink, by clicking anywhere on the row, and then click ✎ .

   The Hyperlink page appears.

5. Make the necessary changes.

6. Click **Save**. The system saves the modified hyperlink to the database and displays the updated Document Type page, if the operation is completed successfully.

Deleting a Hyperlink

To delete a hyperlink

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. On the Document Types page do one of the following:

   - Click the name of the document type you want to delete a hyperlink for.

   - Select the document type by clicking anywhere on the row, and then click ✎ .

   The Document Type page appears.

3. Select the **Hyperlink** tab at the top of the page.

4. Do one of the following:

   - Select the hyperlink you want to delete, by clicking anywhere on the row, and then click ✖ .

   - Click ✖ at the end of the row with the hyperlink you want to delete.

   A dialog box appears.

5. Click **Delete**, to delete the hyperlink from the list.

Available Views

You can select views that will be available to users in the document (report) search results page.

To display the Available Views page

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the **Available Views** tab.

To define data views that are to be available for the current document type, select appropriate check boxes and click **Save**.

PDF Print Settings

You can define PDF export settings for printing from **Report** and **Table/Summary** views. These settings do not affect PDF printing from ES Style views (see Adding a Template).

To display the PDF Print Settings page

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the PDF Print Settings tab.

4. Define the appropriate settings and click **Save**.

Digital Signature Settings

You can set the requirement to provide a digital signature on Excel workbook exports.

Digital signatures can be applied to Excel exports using XSLX format and Monarch XMOD model format only.

A digital signature guarantees that data has not been manipulated after the spreadsheet was created by the Monarch Server.

To display the Digital Signature Settings page

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Document Types**.

2. Open a document type for editing by clicking its name.

3. Click the Digital Signature Settings tab.

    The Digital Signature Settings page contains the following items:

    -   **Enable Digital Signature on this Document Type**: Select the check box, if you want to enable digital signatures on Excel workbook exports.

    -   **Certificate Name**: A digital signature may be acquired from a Certificate Authority (CA) or generated by Office 2007 Tools. Monarch Server only supports Digital Signatures based on User Stores (no support for file-based digital signatures). Therefore, the certificate name must always include the container reference ('CN=').

    -   **Friendly Name**: Optional and will be included with the certificate for the user's information.

    -   **Require Signature**: Select this check box to force a signature on all exports including those made by users without a user preference of XLSX format.

    -   **Save**: Click to save the settings.

    -   **Copy to All Document Types and Save**: Click to copy the settings to all document types and save.

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

Filing Tasks

A filing task is used to archive reports into a storage volume. After you have configured a filing task, you can run it via a filing process.

All filing tasks used in the system are listed on the Filing Tasks page. To display this page, click **Content System** on the Navigation Tree, then click **Document Management** and select **Filing Tasks**.

Use this page to add, edit, or remove a filing task.

Adding a Filing Task

Adding a filing task is one of the steps of archiving reports into the Monarch Server system. (See Archiving Reports for a list of steps you need to perform before you add a filing task.)

To add a filing task

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Filing Tasks**.

2. Click **+** to display the **Filing Task** page.

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

The **Filing Task** page contains the following items:

General Options

❑ **Filing Task Name**: Enter a unique name of a new filing task.

❑ **Description**: Enter any text defining the filing task. This step is optional.

❑ **Task Priority**: If there are several tasks in queue, the system will first handle those with higher priority. Select priority from the following options: Lowest, Below Normal, Normal, Above Normal, Highest.

Location

Select the location type from the following options: **Physical Location**, **Virtual Location**.

If you select the **Physical Location** type provide the following information:

❑ **Location**: Specify the CORBA name of the server, which you can select from the list.
   Select the Any Location option, if you specified a UNC path in the File Path field.

> **NOTES**
>
> If the required server is not on the list, refer to Locations Management topic to add a new location.

❑ **File Path**: Specify the path to a folder containing files to be processed or click the Browse button to locate it.

❑ **File Name Mask**: Specify an input file mask. You can use wildcard characters * (to substitute for any zero or more characters) and ? (to substitute for a single character).

❑ **Pin filing task to run only on the specified location**: Enable the check box to specify forcefully a particular machine for filing task implementation. The check box is used if you use distributed MS installation with Datawatch.RemoteServices.FilingDispatcherServiceHost module run on different locations. Enabling the check box displays the Location to run drop-down list.

❑ **Location to run**: Select a machine from the list for pinning the filing task. If no machine is selected for pinning the filing task, the Monarch Server system will select the most relevant machine for running the filing task. If the machine with stopped Datawatch.RemoteServices.FilingDispatcherServiceHost module is selected, the filing task will not be implemented.

If you select the **Virtual Location** type provide the following information:

❑ **Virtual Path**: Specify the virtual path to a folder containing files to be processed.

❑ **File Name Mask**: Specify an input file mask. You can use wildcard characters * (to substitute for any zero or more characters) and ? (to substitute for a single character).

Document Groups

❑ **Document Group**: Select a document group from the list to narrow the selection list of document types.

❑ **Document Type**: Click the Select Document Type button to open a dialog box, where you can select the document type that you want to assign to a task.

Converter Type

Converter Type:

Converter:　　　None ▾

Processing Type

❑ **Read and process internal indexes**. This option is selected by default. It is used for reading text and PDF reports where index values will be extracted and reports will be mined by users.

❑ **Process as native document**. This option is used for processing any file or document that does not require index values extraction, and mining from its content. Native documents can be indexed on fixed values (Index defaults), document date, and filename element values. This option requires licensing. To display native documents, appropriate software should be installed on the client's computer (for example, XLS documents will require MS Excel application or viewer).

File processing during filing

❑ **Pre-mine all processed reports for interactive data analysis**: Select this option, if you want table data to be extracted from the reports during the filing process and put into the Monarch Server database. Then the data can be used to build Dynamic View data views. This option requires licensing.

File processing after filing

Select one of the options listed below, which describe actions for processing files after filing. Files may be saved, deleted or moved to other directory.

❑ Leave input files where they are

❑ Delete input files

❑ Move input files to the location (specify folder)

❑ Move files causing errors to folder (specify folder)

the **Location** list.

Select one of the options listed below, which describe actions for processing input files with zero size before filing. Files may be deleted or moved to other directory.

❑ Delete 0k input files

❑ Move 0k input files to the location (specify folder)

NOTES

When specifying folder, you may use the naming macros to name the

destination folder. To do this, click the **Insert Macro** icon ▶ and select the naming macros from the drop-down list.

File Storage Options

❑ **Use separate PDF storage in addition to plain text storage**: For filing of PDF reports only. When PDF reports are filed, the text is stripped and stored in Monarch Server for fast and efficient mining operations. If this option is selected, the original PDF report is also stored for separate retrieval.

❑ **Store Original Report**: When reports are read and indexed for storage, their format is changed to enable fast and efficient retrieval and mining. Selecting this option will also store the original report, as read, to the storage system.

❑ **Pages / Storage Unit**: In storing reports, there are trade-offs between the compression ratio (disk space requirements) and speed of retrieval. A higher number of Pages / Storage Unit can provide dramatically increased storage compression but at a possible cost of reduced retrieval efficiency and performance.

Other Processing Options

❑ **Automatically start task when a new file appears**: If you select this option, a filing process definition is not required for the filing tasks. New files will be automatically queued and processed.

❑ **Task priority**: If there are several tasks in queue, the system will first handle those with higher priority. Priority is set by numeric values in inverse relation, meaning the higher the priority — the smaller the number, top priority being "1". By default, if this field is left blank, the system will consider it a top-priority task. (when Auto selected).

❑ **Log performance statistics**: Select this option to gather the following indexing performance statistics: keywords quantity, documents and pages quantities, time for each indexing stage, total time for task and task status. This information is collected in [Instance_Name][Filing_Task_Name][Date][Time].log files.

❑ **Block Reports**: Select the check box to block reports, so that reports cannot be searched for or viewed by non-admin users in MSClient.

NOTES

You can also block reports via the **Report Instances** tab.

Redaction settings are available only if a redaction license is enabled in MS.

❑ **Store reports redacted**: Select this option to allow storage reports to be stored with redaction. In this case reports are stored in the redacted format in storage volume.

❑ **Store mining data redacted**: Select this option to allow pre-mined data to be stored with redaction.

❑ **Save**: Saves a new or existing filing task.

❑ **Clear**: Clears all the boxes.

❑ **Cancel**: Cancels the operation.

NOTES

Identical reports may only be filed once. Reports with the same attributes (file name, file date, and file size) as a previous report will not be filed for the same Document Type.

Assigning Filing Tasks to Filing Processes

To execute a filing task, you need to assign it to a filing process. The filing process runs and executes the filing task at a certain time, according to the scheduled execution frequency.

NOTES

You can configure a new filing process and add the filing task to it, or you can add the task to an already existing process.

To assign a filing task to a filing process

1. On the Navigation List, click Content System, then click **Filing Processes**. The Filing Processes page appears.

2. Do one of the following:

   • Click the name of the filing process you want to add a filing task to.

   • Select the filing process by clicking anywhere on the row, and then click ✏.

   The Filing Process page displays.

3. Drag the task you want to assign to the process, from the **Available Tasks** pane to the **Assigned Tasks** pane.

4. Check the process execution frequency and make any adjustments to it, if necessary.

5. Click **Save**.

The process will execute the filing task according to the scheduled execution frequency.

NOTES

If you prefer, you can execute the process immediately by clicking the **Run Now** button.

Editing a Filing Task

1. On the Navigation Tree, click **Content System**, then click **Document Management**and select **Filing Tasks**.

2. Do one of the following:

   - Click the name of the filing task you want to edit.

   - Select the filing task, by clicking anywhere on the row, and then click ✏ .

   The Filing Task page appears. For details about how to change its items refer to Adding a Filing Task.

3. Make the necessary changes.

   The following tabs become available when you edit an existing filing task:

   - **Pre Processing** tab: Allows you to define the list of applications with appropriate parameters, which will be launched before carrying out the current task. For details, see Extra Processing page.

   - **Index Defaults** tab: Allows you to edit index default values for a filing task. For details, see Edit Index Defaults.

   - **Post Processing** tab: Allows you to define the list of applications with appropriate parameters, which will be launched after carrying out the current task. For details, see Extra Processing page.

   - **Filing Results** tab: Allows you to display the filing results, which are generated for the task where these results are available. For details, see Filing Results page.

4. Click **Save**. The system saves the modified filing task to the database and displays the updated Filing Task page, if the operation is completed successfully.

Deleting a Filing Task

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Filing Tasks**.

2. Do one of the following:

   - Select the filing task you want to delete, by clicking anywhere on the row, and then click ✖ .

   - Click ✖ at the end of the row with the filing task you want to delete.

   A dialog box appears.

3. Click **Delete** to delete the filing task from the list.

Extra Processing Page

The Extra Processing page allows you to define and edit pre-processing and post-processing actions for filing tasks. These actions will be launched before or after carrying out a filing task.

1. Click Content System, then click Document Management and select Filing Tasks.

2. Click the name of a task you want to specify pre-processing or post-processing actions for.

3. Select the **Pre Processing** or **Post Processing** tab at the top of the Filing Task page.

The Extra Processing page contains:

❑ **Extra Processing** pane: Displays the path to the specified executable file, the specified Ignore Fail setting (that is, Yes or No), and the specified command line parameters.

❑ The **Add** button: Click to add an extra processing action to the list. The Add Extra Process dialog box appears,
containing the following items:

- **Executable File**: Enter the path to an executable file to be used for pre- or post-processing.

- **Command Line Parameters**: Enter a command statement and any necessary parameters of a process,
which you want to launch before or after carrying out the current task.

- **Ignore Fail**: Specify the desired Ignore Fail setting by either selecting this check box (to specify a Yes
setting) or leaving it unselected (to specify a No setting). The Ignore Fail setting species whether or not the
filing task should still be run if a pre- or post-processing action fails. Select Yes to have the filing task run if
the pre- or post-processing action fails, or No to prevent the filing task from running if it fails.

❑ The **Save** button: Saves the new extra process.

❑ The **Clear** button: Clears all boxes.

❑ The **Cancel** button: Cancels the operation.

Edit Index Defaults Page

You can specify index defaults for a document type. Whenever documents of that type are archived in the system via
a filing task, the default index values are applied to them. Monarch Server users can then retrieve these documents
by using the default index values in their search criteria.

To access the Edit Index Defaults page

1. Click Content System, then click Document Management and select Filing Tasks.

2. Click the name of a task you want to edit index defaults for.

3. Select the **Index Defaults** tab at the top of the page.

The Edit Index Defaults page contains:

❑ **Default Values** pane: Displays the paired index fields and values you have specified.

❑ The **Index** list: Select the index field, for which you want to specify a default value.

- ❑ The **Value** field: Enter a default value for the selected index field.

    You can build default values from file-name elements:

    a. Click the **Select** button. The **Index Value** dialog box appears.

    b. Type any optional text in **the Index-Value String** field.

    c. Specify the element number and delimiter.

    d. Click **Apply**. The file name macro ([FNE <element number>/<delimeter>]) will be added to the string. For example, if you specify the element number as **1** and the delimiter as a period (**.**), then the first element of the file name before the period will be included in the index-value string.

    e. Click **Save**.

- ❑ The **Add** button: Click to add the paired index field and value to the Default Values field.
- ❑ The **Save** button: Saves any changes you have made to the settings.
- ❑ The **Clear** button: Clears all boxes.
- ❑ The **Cancel** button: Closes the window without saving any changes to the settings.

Filing Results Page

The system collects the following data about all filing task executions:

- ❑ Files and documents created by a particular filing task execution
- ❑ Filing task start time and date
- ❑ Filing task finish time and date

You can view the list of all filing task executions on the Filing Results page.

To access the Filing Results page

1. Click Content System, then click Document Management and select Filing Tasks.
2. Click the name of the task you want to view filing results for.
3. Select the **Filing Results** tab at the top of the page.

The Filing Results page shows the number of summary documents being processed by all filling tasks during the period indicated in the **From** and **To** columns. The number of summary documents is shown in the **Number of Documents** column. To display the **Start Time** and **Finish Time** of each filing task, click a plus sign in the first column.

Using the drop-down list at the top of the table, you can display filing task executions grouped by the following periods: **None** (all executions are shown), **Daily**, **Weekly**, and **Monthly**.

Click ✏ to edit filing task results (change the report date range or block all reports).

An administrator can delete any particular filing task result or a group of filing task results by clicking ✖ . When deleting particular groups of filing task results, all selected filing task results will be deleted. When deleting filing tasks results, all files and documents created by the filing task execution will be deleted (similar to maintenance task deletions).

NOTES

The number of items shown per page is limited by the value of the **Count**

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of items per page item in system preference (settings). For more information refer to System Settings.

Filing Processes

Filing processes are used to schedule and run filing tasks. When a filing process runs, it executes all filing tasks that are assigned to it.

All filing processes used in the system are listed on the Filing Processes page. To display the Filing Processes page, click **Content System** on the Navigation Tree, then click **Document Management** and select **Filing Processes**.

The Filing Processes page lists the existing filing processes.

The list shows

❑ Process name

❑ Run Now (click 🕐 to run the process immediately)

❑ Suspend status

❑ Last started date and time

❑ Last finished date and time

❑ Next execution date and time of the current process

Use the Filing Processes page to add, edit or delete a filing process.

You can also:

❑ Suspend all processes, by clicking the Suspend button below the list.

❑ Resume all processes, by clicking the Resume button below the list.

❑ Run a process immediately, by clicking the 🕐 icon next to its name.

❑ Update the status of filing processes by clicking the 🔄 icon, below the list.

Adding a Filing Process

To add a filing process

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Filing Processes**.

2. Click ➕ to display the **Filing Process** page.

3. **Name**: Enter a unique name of a new process.

4. **Number of concurrent tasks**: Enter the number of the concurrent tasks. Enter **1**, if you want several tasks to be executed sequentially. Enter the actual number of tasks, if you want them to be executed simultaneously.

5. **Suspended**: Select this check box, if you want to suspend the current process.

6. **Available Tasks**: Displays all available tasks, from which you can select the tasks to assign to the current process. To add a task, drag it from the left pane to the right pane.

NOTES

You can search for a particular task by typing (part of) its name in the **Filter by** field and clicking **Apply**.

7. **Assigned Tasks**: The tasks in this pane will be assigned to the current process. The tasks are carried out in the order they appear on the list. To change the order, drag an item up or down. To remove a task, drag it to the left pane.

8. **Execution Frequency**: These options allow you to set periodicity of launching the current process. For more information, see Defining Execution Frequency.

9. To save the new process, click the **Save button**.
    The system saves the new process to the database and displays the updated **Filing Processes** page, if the operation is completed successfully.

10. To allow an administrator to launch the process immediately and save the schedule in the database with the **Run Once** scheduling type and the current date as a date to run, click **Run Now**.

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

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

Editing a Filing Process

To edit a filing process

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Filing Processes**.

2. On the Filing Processes page, do one of the following:

    *   Click the name of the filing process you want to edit.

    *   Select the filing process, by clicking anywhere on the row, and then click ✏.

3. The Filing Process page appears. For details about how to change its items refer to Adding a Filing Process.

4. Make the necessary changes and click **Save**. The system saves the modified process to the database and displays the updated Filing Processes page.

Deleting a Filing Process

To delete a filing process

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Filing Processes**.

2. Do one of the following:

    *   Select the filing process by clicking anywhere on the row, and then click ✖.

    *   Click ✖ at the end of the row with the filing task you want to delete.

    A dialog box will appear.

3. Click **Delete** to delete the filing process from the list.

Assigning Filing Tasks to Filing Processes

To execute a filing task, you need to assign it to a filing process. The filing process runs and executes the filing task at a certain time, according to the scheduled execution frequency.

NOTES

You can configure a new filing process and add the filing task to it, or you can add the task to an already existing process.

To assign a filing task to a filing process

1. On the Navigation Tree, click **Content System**, then click **Document Management** and select **Filing Processes**.

2. Do one of the following:
   - Click the name of the filing process you want to add a filing task to.
   - Select the filing process, by clicking anywhere on the row, and then click .

3. Drag the task you want to assign to the process, from the **Available Tasks** pane to the **Assigned Tasks** pane.

4. Check the process execution frequency and make any adjustments to it, if necessary.

5. Click **Save**.

The process will execute the filing task according to the scheduled execution frequency.

NOTES

If you prefer, you can execute the process immediately by clicking the **Run Now** button.

Running a Filing Process

When a filing process runs, it executes all filing tasks assigned to it. A filing process can be run in two ways:

❑ **Manually** — To run a filing process manually, click the Run Now button on the Filing Process page. You can do this immediately after you've finished configuring a new process. (Note: When you click the Run Now button, there may be a brief delay before the process actually runs. This is due to a time discrepancy between the server's clock and the clock on the local machine. Processes are run according to the time of the server's clock.)

❑ **Scheduled** — To execute a filing process at a scheduled runtime, specify the execution frequency for it on the Filing Process page, then click the Save button. The process will be executed at the specified time.

DOCUMENT RETRIEVAL

The topics in this section provide information about:

❑ Search Groups

❑ Searches

❑ Search Notifications

❑ System Notifications

❑ Filing Notifications

❑ Offline Tasks

❑ Offline Processes

Search Groups

Search groups provide a convenient way of grouping similar or related searches together.

All search groups used in the system are listed on the Search Groups page. To display the Search Groups page, click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **Search Groups**.

Use this page to add, edit or delete a search group.

Adding a Search Group

To add a search group

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Search Groups**.

2. Click ✛ on the **Search Groups** page.

3. **Search Group Name**: Enter a unique name of a new search group.

4. **Description**: Optionally, enter any text defining the search group.

5. **Available Searches**: The searches from this pane may be assigned to the current search group. To add a search, drag it from the left pane to the right pane.

> **NOTES**
>
> You can search for a particular query by typing (part of) its name in the **Filter by** field and clicking **Apply**.

6. **Assigned Searches**: Displays the searches selected by an administrator for the current search group. To remove a search, drag it to the left pane.

7. To save a search group, click the **Save button**.
   The system saves the new search group to the database and displays the updated **Search Groups** page, if the operation is completed successfully.

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

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

> **NOTES**
>
> If you assign a search to the current search group, the system automatically excludes it from the search group, which had contained it before. If you exclude a search from the search group, it will not appear in MSClient.

Editing a Search Group

To edit a search group

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Search Groups**.

2. Click the name of the search group you want to edit or click anywhere on its row, and then click ✎ . The **Search Group** page appears. For details about how to change its items refer to Adding a Search Group.

3. Make the necessary changes and click **Save**.
   The system saves a modified search group to the database and displays the updated **Search Groups** page, if the operation is completed successfully.

Deleting a Search Group

To delete a search group from the list

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Search Groups**.

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

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

Searches

Searches allow Monarch Server users to query the report warehouse and retrieve documents that match the search criteria. You can add pre-configured searches to the system and then assign them to users (see Adding a Search). You can also grant users the Document Search privilege, which allows them to configure their own searches.

All searches used in the system are listed on the Searches page. To display this page, double-click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **Searches**.

Use this page to add, edit or delete a search.

Adding a Search

To add a search to the list

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Searches**.

2. Click ➕ on the **Searches** page.

3. **Search Type**: Select either Document Search or Report Search.

4. **Search Name**: Enter a unique name of a new search.

5. **Search Group**: Select a search group, to which the current search will be assigned.

6. **Document Groups**: Select a document group, where the search is to be made.

7. **Available Document Types**: This pane displays available document types, which depends on the selected document group. To add a document type, drag it from the left pane to the right pane.

8. **Assigned Document Types**: This pane displays the assigned document types.

9. **Document Date**: Using the calendar, define the time interval to be covered by the current search.

10. **Annotation Criteria**: Define whether the search should include annotated reports, non-annotated reports or all reports.

11. **Search Criteria**: To specify additional search criteria, including several conditions that involve multiple keyword types and keyword values, click the **Add condition** button.

12. Select a Boolean operator (**AND** or **OR**). While the **AND** operator can be used to link search criteria of different keyword types, the **OR** operator can only be used to link search criteria of the same keyword type.

13. Select a keyword type. The list contains keyword types that are used in the selected document types.

14. Select a relational operator (equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=).

15. Enter a keyword value. To look up available keyword values, click the **Lookup** button.

16. To add another condition, click the **Add condition** button and repeat steps 2-5. To remove a condition, click the **Remove** button.

17. To save a new or existing search, click the **Save button**.
    The system saves the new search to the database and displays the updated **Searches** page, if the operation is completed successfully.

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

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

Assigning Searches

After you configure a search, you can assign it to roles, user groups and users, so that they can use it.

To assign a search to roles, user groups and users

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Searches**.

2. Select the search you want to assign to roles, user groups, or users:

   - Click the name of the search you want to assign to roles, user groups, or users; or

   - Clicking anywhere on the row, and then click ✏.

3. Click the **Rights** tab at the top of the page. The **Rights** tab is available only for existing objects (in the **Edit** mode).

4. To make a search available to all users, select **Global** check box and click the **Save** button.
   Otherwise proceed to the next steps.

5. Click **User Groups** to expand the section enabling you to select user groups that you want to have access to the search.
   To select a user group, drag it from the left pane to the right pane.

6. Click **Roles** to expand the section enabling you to select roles that you want to have access to the search.
   To select a role, drag it from the left pane to the right pane.

7. In the **Users** section, select users that you want to have access to the search.
   To select a user, drag it from the left pane to the right pane.

8. Click the **Save** button.

Editing a Search

To edit a search

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Searches**.

2. Select the search you want to edit on the **Searches** page:

   - Click the name of the search you want to edit, or

   - Clicking anywhere on the row, and then click ✏.
     The Search page appears. For information on how to change search options, see Adding a Search.

3. To assign the search to roles, user groups and users, select the **Rights** tab at the top of the page.

4. Make the necessary changes and click **Save**. The system saves the modified search in the database and displays the updated Search page, if the operation is completed successfully.

Deleting a Search

You can delete a search from the system at any time. Keep in mind, however, that if you delete the search, users will no longer be able to use it.

> **NOTES**
>
> In some cases it makes more sense to edit the search (deny everyone's access rights to it) rather than to delete it outright. If you delete it, in the

future if you find that you need the same search (or a similar one), you will have to configure and save it all over again. If, instead of deleting it, however, you remove everyone's access to it, you could easily "activate" it in the future should you need to do so.

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Searches**.

2. Select the search you want to delete on the **Searches** page:

    • Click the name of the search you want to delete, or

    • Clicking anywhere on the row, and then click ✖ . A dialog box appears

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

Search Notifications

Search notifications are an automated way of notifying Monarch Server users via e-mail that a scheduled search has been run. Only authorized users of the Monarch Server system may receive search notifications.

A scheduled search runs at a certain time according to its specified execution frequency. Search notifications automatically trigger an e-mail to specified users, notifying them that the search has occurred and providing a link to the resulting document list. Users may subscribe to permitted notifications from MSClient.

Unlike system notifications, search notifications are not predefined.

NOTES

You can only create, edit and delete notifications if you have been granted **Create Notification** rights by your system administrator. If you have not been granted notification rights, however, and another Monarch Server user with notification rights assigns a notification to you, you can still select it (that is, turn it on) and be notified, when a search occurs.

The creator of the notification automatically receives the rights to the notification.

Search notifications are listed on the Search Notifications page, which you can use to add, edit, or remove search notifications.

To display the Search Notifications page, click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **Search Notifications**.

Adding a Search Notification

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Search Notifications**.

2. Click ✚ on the Search Notifications page. The **Search Notification** page appears.

3. **Search Notification Name** box: Enter a unique name for a notification.

4. **Search Groups** drop-down list: Select the search group that contains the search you want to apply a notification to.

5. **Searches** box: Select the search that you want to apply a notification to. (**Note**: Available searches are determined by the search group you specified earlier.)

NOTES

You can search for a particular query by typing (part of) its name in the **Filter by** field and clicking **Apply.**

6. **Execution Frequency**: To set the periodicity of launching the notification, select an appropriate option and fill in additional fields that appear.

7. To save the new notification, click the **Save** button.
The system saves the new notification to the database and displays the updated Notifications page, if the operation is completed successfully.

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

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

NOTES

You can assign a notification to a role, user group or user via the **Rights** tab, which is available only for existing search notifications. For more details see Editing a Search Notification.

At a specified time the search runs, and all users, who turned on the notification, receive an e-mail notification.

Editing a Search Notification

You can edit a search notification that you have added. You cannot edit search notifications added by other Monarch Server users. If these notifications have been assigned to you, however, you can turn them on or off (that is, specify whether you want them applied to you or not).

To edit a search notification

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Search Notifications**.

2. Select the search notification you want to edit on the Search Notifications page:

   • Click the name of the search notification, or

   • Select the search notification, by clicking anywhere on the row, and then click 🖊 .
     The Search Notification page appears. For details about how to change its items refer to Adding a Search Notification.

3. To assign a search to a role, user group or user, click the **Rights** tab at the top of the page.

NOTES

The **Rights** tab is available only for existing objects (in the **Edit** mode).

4. To make a search notification available to all users, select **Global** check box and click the **Save** button. Otherwise proceed to the next steps.

5. Expand hidden sections by clicking the **User Groups**, or **Roles** heading. To specify the roles, groups or users that you want to have rights to the notification, drag their names from the left pane to the right pane (in an appropriate section).

> **NOTES**
>
> Assigning a notification to a role, user group or user does not guarantee that they will be notified when the search is executed. They will only be notified if they have selected the notification on the Notifications page in MSClient.

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

Deleting a Search Notification

You can delete any notifications you have created via the Search Notifications page.

> **NOTES**
>
> You cannot delete notifications created by other Monarch Server users.

To delete a search notification from the list

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Search Notifications**.

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

3. Click **Delete** to delete the search notification from the list.

System Notifications

System notifications are an automated way of notifying Monarch Server users via e-mail that a particular system event has occurred. Only authorized users of the Monarch Server system may receive notifications.

The events that trigger system notification are pre-defined and cannot be edited or deleted. Typically, these types of notifications are sent to system administrators who are monitoring the system. Users may select which of the notifications are sent to them. Notifications may be sent to more than one user.

System notifications are listed on the System Notifications page. They are pre-defined and can not be edited or deleted.

To display the System Notifications page, click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **System Notifications**.

1. Click the name of a system notification.

2. To make a system notification available to all users, select **Global** check box and click the **Save** button. Otherwise proceed to the next steps.

3. Expand hidden sections by clicking the **User Groups**, or **Roles** heading. To specify the roles, groups or users that you want to have rights to the system notification, drag their names from the left pane to the right pane (in an appropriate section).

4. Click **Save**.

NOTES

Assigning rights to a system notification does not mean that the notification will be sent. It only allows users to receive the notification, if they request it. Each user must specifically request each notification they want to receive.

You can also assign rights to receive system notifications in the following way:

1. In MSAdmin, click **Rights and Privileges**, and select either **Roles**, **User Groups**, or **Users**.

2. Click the name of a role, user group or user, to whom you want to assign rights.

3. Select the **System Notifications** tab at the top of the page.

4. Drag appropriate items from the Available System Notifications pane to the Assigned System Notifications pane.

5. Click **Save**.

Users may receive notifications for the following event types:

❑ **FILING - Filing process completion events**: Sends an e-mail to the user whenever any filing process completes.

❑ **FILING - Filing process - Database error events**: Sends an e-mail to the user whenever a database error occurs during a filing process.

❑ **FILING - Filing process - Generic error events**: Sends an e-mail to the user whenever a non-specific error occurs during a filing process.

❑ **FILING - Filing process - Disk off-line error events**: Sends an e-mail to the user whenever a disk offline error occurs during a filing process.

❑ **FILING - Filing process - Not enough space error events**: Sends an e-mail to the user whenever insufficient space error is encountered during a filing process.

❑ **FILING - Filing process - File system error events**: Sends an e-mail to the user whenever a file system error is encountered during a filing process.

❑ **FILING - Filing process - No sub volume error events**: Sends an e-mail to the user whenever no sub-volume error is encountered during a filing process.

❑ **MAINTENANCE - Maintenance process completion events**: Sends an e-mail to the user whenever any maintenance process completes.

❑ **DISK_OFFLINE - Offline disk request events**: Sends an e-mail to the user whenever any offline disk request is issued.

❑ **VOLUME_FULL - Volume full events**: Sends an e-mail to the user whenever a volume becomes full.

❑ **VOLUME_ALMOST_FULL - Volume almost full events**: Sends an e-mail to the user whenever a volume has less than 2 x Storage Group size free.

- ❑ **LAST_VOLUME - Last volume usage events**: Sends an e-mail to the user whenever documents begin to be archived in the last volume in a storage group.

- ❑ **ONLY_ARCHIVE_REPORT - Working report request events**: Sends an e-mail to the user whenever a request is submitted to restore an archived report to a working state.

- ❑ **FILE_OFFLINE - Offline file request events**: Sends an e-mail to the user whenever an offline file request is made.

- ❑ **ERROR - All error events**: Sends an e-mail to the user whenever any process results in an error condition.

- ❑ **WARNING - All warning events**: Sends an e-mail to the user whenever any process receives a warning.

- ❑ **SEARCH - New search creation events**: Sends an e-mail to the user whenever a new search is created.

Filing Notifications

Filing notifications are an automated way of notifying Monarch Server users via e-mail that a filing event has occurred. Only authorized users of the Monarch Server system may receive filing notifications.

Filing notifications are listed on the Filing Notifications page, which you can use to add, edit, or remove notifications.

To display the Filing Notifications page, click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **Filing Notifications**.

NOTES

Users may subscribe to or unsubscribe from filing notifications via the MSClient application.

Adding a Filing Notification

To add a filing notification

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Filing Notifications**.

2. Click ✚ on the Filing Notifications page. The **Filing Notification** page appears.

3. **Filing Notification Name**: Enter a unique name of a new notification.

4. **Filing Description**:Optionally, enter any text defining the filing notification

5. **Document Groups**: Select a document group that contains the document type you want to apply the notification to.

6. **Document Types**: Select the document types to be included in the filing notification definition.

7. **Run immediate**: Select this check box to execute the filing notification immediately upon the filing completion event. Each filing notification will be sent as an individual e-mail.

8. **Execution Frequency**: These options become available if you have not selected the **Run immediate** check box. You can set the frequency of executing filing notifications.

9. To save a new or existing filing notification definition, click the **Save** button.

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

11. **Save**: Saves a new or existing filing notification definition.

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

Editing a Filing Notification

You can edit any filing notification that you have added. You cannot edit filing notifications added by other Monarch Server users. If these filing notifications have been assigned to you, however, you can turn them on or off (that is, specify whether or not you want them applied to you) in MSClient.

To edit a filing notification

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Filing Notifications**.

2. Select the filing notification you want to edit on the **Filing Notifications** page:

   - Click the name of the filing notification you want to edit, or

   - Click anywhere on the row, and then click ✏ .
     The Filing Notification page appears. For details about how to change its items, see Adding a Filing Notification.

3. To assign a filing notification to a role, user group or user, click the **Rights** tab at the top of the page.

4. To make a filing notification available to all users, select **Global** check box and click the **Save** button. Otherwise proceed to the next steps.

5. Expand hidden sections by clicking the **User Groups**, or **Roles** heading. To specify the roles, groups or users that you want to have rights to the notification, drag their names from the left pane to the right pane (in an appropriate section).

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

Deleting a Filing Notification

You can delete any filing notifications you have created via the Filing Notifications page. (You cannot delete notifications created by other Monarch Server users.)

To delete a filing notification

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Filing Notifications**.

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

3. Click **Delete** to delete the filing notification from the list.

Offline Tasks

Offline processing provides the ability to process large datasets in the offline mode on a scheduled basis. If a user requests some operation (view report, table, summary, and so on) for a dataset of a size exceeding the system limit, Altair offers to process such requests in the offline mode. Schedule information for this task includes the start and stop time, which allows executing the task at the specified time only.

All offline tasks used in the system are listed on the Offline Tasks page. To display the page, click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **Offline Tasks**.

The **Offline Tasks** page displays the following information:

❑ **User Name**: Displays the user name for an offline task.

❑ **Task Name**: Displays the name of an offline task.

❑ **View Type**: Displays one of the following view types: Table, Summary, Excel, or PRF.

❑ **Creation Date**: Displays the creation date and time of an offline task.

❑ **State**: Displays the state of the offline task. It can be one of the following: Ready, Processing or Pending.

To delete an offline task from the list

1. Click ✖ at the end of the row with the offline task you want to delete. A dialog box appears.

2. Click **Delete** to delete the offline task from the list.

Offline Processes

Offline processes are used to schedule and run offline tasks. When an offline process runs, it executes all offline tasks that are assigned to it.

All offline processes used in the system are listed on the Offline Processes page. To display the Offline Processes page, click **Content System** on the Navigation Tree, then click **Document Retrieval** and select **Offline Processes**.

The list shows

❑ Process name

❑ Run Now (click 🕐 to run the process immediately)

❑ Suspend status

❑ Last started date and time

❑ Last finished date and time

❑ Next execution date and time of the current process

Use the **Offline Processes** page to add, edit, or remove an offline process from the list.

You can also:

❑ Suspend all processes, by clicking the Suspend button below the list.

❑ Resume all processes, by clicking the Resume button below the list.

❑ Run a process immediately, by clicking the 🕐 icon next to its name.

Adding an Offline Process

To add a process

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Offline Processes**.

2. Click **+** on the Offline Processes page. The Offline Process page appears.

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

This page contains the following items:

❑ **Name**: Enter a unique name of a new process.

> **NOTES**
>
> All tasks with the **Pending** status will be automatically assigned to the current process.

❑ **Processing Length**: Specify the value between 1 and 60 for the field processing length.

❑ **Suspended**: Select this check box to suspend the current process.

❑ **Execution Frequency**: These options allow you to set periodicity of launching the current process. For more information, see Execution Frequency.

❑ **Save**: Saves a new process.

❑ **Run Now**: Allows an administrator to launch the process immediately and saves the schedule in the database with the Run Once scheduling type and the current date as a Date to run.

❑ **Clear**: Clears all the boxes.

❑ **Cancel**: Cancels the operation.

Running an Offline Process

When an offline process runs, it executes all offline tasks assigned to it. A offline process can be run in two ways:

❑ **Manually** — To run an offline process manually, click the Run Now button on the Offline Process page. You can do this immediately after you've finished configuring a new process, or you can manually run a previously configured process by going to the Offline Processes page, selecting the process you want to run, and then clicking the Run Now button.

> **NOTES**
>
> When you click the **Run Now** button, there may be a brief delay before the process actually runs. This is due to a time discrepancy between the server's clock and the clock on the local machine. Processes are run according to the time of the server's clock.

❑ **Scheduled** — To execute an offline process via a scheduled runtime, specify the execution frequency for it on the Offline Process page, then click Save. At the specified time, the process will be executed.

Editing an Offline Process

To edit an offline process

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Offline Processes**.

2. Do one of the following:

   - Click the name of the offline process you want to edit.

   - Select the offline process, by clicking anywhere on the row, and then click ✎ .

   The Offline Process page appears. For details about how to change its items refer to <u>Adding an Offline Process</u>.

3. Make the necessary changes and click **Save**. The system saves the modified offline process to the database and displays the updated Offline Processes page, if the operation is completed successfully.

Deleting an Offline Process

To delete an offline process

1. On the Navigation Tree, click **Content System**, then click **Document Retrieval** and select **Offline Processes**.

2. Do one of the following:

   - Select the offline process you want to delete, by clicking anywhere on the row, and then click ✖ .

   - Click ✖ at the end of the row with the offline process you want to delete.

   A dialog box appears.

3. Click **Delete** to remove the offline process from the list.

TRANSFER

The topics in this section provide information about <u>importing</u> and <u>exporting</u> of document types, document types configurations and objects related to them.

Export

To export document types

1. On the Navigation Tree, click **Content System**, then click **Transfer** and select **Export**.

2. Select the document types you want to export. Multiple selection is available.

3. Under each document type you can specify items for export.

NOTES

The following items are exported by default: Index Model, Document Type Group, Index Fields, PDF Settings, Digital Signatures, and Available Views.

4. Click the **Export** button and save the exported file.

NOTES

The output of the export operation will be an XML file with the following name *Migration_MM_DD_YY_hh_mm_ss PM.xml.*

Import

You can only import a document type by selecting the output (in XML format) of a previous export document type operation.

To import document types

1. On the Navigation Tree, click **Content System**, then click **Transfer** and select **Import**.

2. On the displayed page, click the **Upload** button ans select the .xml file you want to import.

NOTES

You can only import an output of a previous export document type operation. The output is an XML file with the following name *Migration_MM_DD_YY_hh_mm_ss PM.xml.*

File Name:	Migration_8_14_2020_6_33_29 AM.xml	Upload

Please select Document Type(s) to import:

☑ **Classic**

☑ **Storage Group**
☑ [Inherit]

☑ **Report Model (1)**
☑ Lesson11

☑ **Document Type Group (1)**
☑ Classic

☑ **Document State Group (1)**
☑ Document State

☑ Classic New

Name Template:	[NAME]	Name	Date	Time	Space
Storage Group:	Classic				

Import

3. Select document type to import. Multiple selection is available.

4. Under each document type you can specify items for export.

NOTES

The following items are imported by default: Index Model, Document Type Group, Index Fields, PDF Settings, Digital Signatures, and Available Views.

5. Under **Storage Group**, select the target storage group from the list. If you select the *[inherit]* value then the imported document type(s) will be placed to the storage group specified in the **Storage Group** field at the bottom of the page.

6. In the **Name Template** field, specify the name(s) for the imported file(s). For this either type in the name you want to assign to the imported document type(s) or insert the following values: name, date, time or space, by clicking the appropriate buttons.

7. Click the **Import** button to import document type(s).

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.

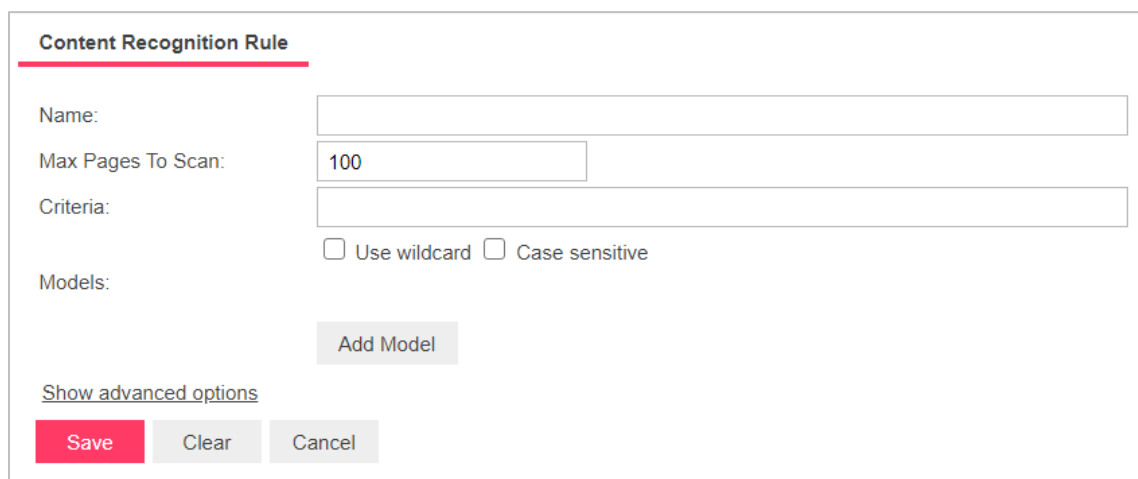## CREATING OR EDITING CONTENT RECOGNITION RULES

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 — Altair Panopticon Designer Workbooks — with Monarch Server. Users of MSClient and RMSClient can view Panopticon Designer 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 Designer 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 ➕ 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 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 ✖ 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 MSClient and 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 ➕ 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.

> **NOTES**
>
> 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.

> **NOTES**
>
> 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](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 project, 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](Add-a-folder)
- ❑ [Edit a folder](Edit-a-folder)
- ❑ [Delete 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.

To assign folder access rights

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 Monarch 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 Adding a Model 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.

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.

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.

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.

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.

> **NOTES**
>
> 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 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

> **NOTES**
>
> Each template type is available only under the appropriate license.

Adding 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.

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

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 Adding a Template topic.

4. Click the **Rights** tab 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.

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.

To delete a template revision

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.

To assign template to user groups, roles, or users

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.

To assign template access rights

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.

NOTES

You cannot delete a template if it is currently assigned to a document type. You must first remove it from the document type in order to delete it from the system.

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 <u>unlock the template</u> 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 Monarch 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

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

The Monarch 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 use security keywords

❑ How to manage roles

❑ How to manage user groups

❑ How to manage users

❑ How to manage document state groups

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.

The following privileges can be granted:

❑ Common privileges

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

- **SubAdmin**: Allows users limited administration.

- **SaaS Administrator**: Allows users limited administration.

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

❑ Content system privileges

- **Document search**: Allows users to configure searches.

- **Save search**: Allows users to save searches that they created.

- **Report search**: Allows users to search and view original reports.

- **Delete document**: Allows users to delete documents from the report warehouse.

- **Download Original Report**: Allows users to download the archive copy of reports.

- **Concatenate Original Reports**: Allows users to download a number of original PDF reports as a single file.

- **Create annotation**: Allows users to create annotations.

- **Create notification**: Allows users to create search notifications and filing notifications.

- **See trustee list on save Annotation**: Allows the user to view the list of trustees in the saved annotation report.

- **See trustee list on save Search**: Allows the user to view the list of trustees in the saved search.

- **Add attachments on Annotations**: Allows the user to add attachments to the annotation report.
- **Create Annotations for all users**: Allows the user to create an annotation report accessible to all users.
- **Edit and delete Annotations**: Allows the user to modify and remove annotations.
- **See Annotations**: Allows the user to view the existing annotations.

❑ 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 by clicking anywhere on the row, and then click ✏ .

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

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

SubAdmin

Only the following components are available to the **SubAdmin** user:

❑ Home

❑ Maintenance Tasks: Delete, Purge, Re-Index, Pre-Mined Data, Block

❑ Maintenance Processes

❑ Index Fields

❑ Document Groups

❑ Document Types (only rights and edit actions are available, and Copy Profile)

❑ All Document Retrieval options are available except Offline Processes.

❑ Portlets

❑ Server Library

❑ All System Reports except Removed Reports are available.

❑ All News are available except Global News

❑ Help

SaaS Administrator

SaaS admin: administrator at the remote customer site without knowledge of paths and physical system structure.

The **SaaSAdmin** user cannot:

❑ Change configured physical attributes in MES.

❑ Create or manage Storage Volumes or Storage Groups.

❑ Define or view post-processing delete/moves/errors.

❑ Establish Physical and Location resources in System Preferences/System Defaults.

❑ Create admins, sub admins, or group admins.

❑ Have visibility to Trustees of type (Full) Admin.

❑ Use the full SQL Syntax (only SELECTs are available.)

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. For example, if you assign document type rights to a user group, all members of that user group will be able to retrieve documents of the specified document type.

NOTES

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:

   • **Report Security**: Allows to grant access to report security rules for the role, user group or user.

   • **Document Types**: Allows to grant access to document types for the role, user group or user.

   • **Unredacted Document Types**: Allows you to select document group and assign its document types for the role, user group or user.

NOTES

The **Unredacted Document Types** tab becomes available only if a redaction license is enabled in MS.

   • **Searches**: Allows to grant access to searches for the role, user group or user.

   • **Views**: Allows to grant access to views for the role, user group or user in the document search results page or 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.

   • **Search Notifications**: Allows to grant access to search notifications for the role, user group or user.

   • **System Notifications**: Allows to grant access to system notifications for the role, user group or user.

   • **Filing Notifications**: Allows to grant access to filing notifications for the role, user group or user.

   • **Group Administrator**: Allows to assign limited administration rights to group administrators.

- **Security Keywords**: Specifies which [security keywords](#) apply to the role, user group or user.
- **Global Security Keywords**: Specifies which [global security keywords](#) apply to the role, user group or user.
- **Document States Security**: Allows to assign rights of [managing document states](#) to 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.

Group Administrator

An administrator can assign limited administration rights to group administrators (users who can perform a limited set of operations in Web Admin). Limited administration rights can be assigned to a user, group, or role. In case of a group or role, all explicit and implicit members of that group or role will have the specified limited rights.

Group administrators can view only those objects, to which they have corresponding rights. For example, when defining a new filing task, they can work only with document types assigned to them.

To display the **Group Administrator** page, when [assigning access rights](#), click the **Group Administrator** tab at the top of the page.

The **Group Administrator** page contains the following items:

❑ **Privileges**: Select check boxes to assign the following privileges to a group administrator:

- **Manage Filing Task**: This privilege enables a group administrator to:
  - ♦ Create a new filing task. When creating a filing task, group administrators can view only those document types, for which they have rights.
  - ♦ Edit existing filing tasks for document types, for which a group administrator has rights.
  - ♦ Delete existing filing tasks for document types, for which a group administrator has rights.

  NOTES

  The group administrator can not add a new location.

- **Manage Searches**: This privilege enables a group administrator to:
  - ♦ Create a new search using document types, for which a group administrator has rights.
  - ♦ Edit existing searches, for which a group administrator has rights. The Search Definition page shall contain only document types, for which a group administrator has rights.
  - ♦ Delete existing searches, for which a group administrator has rights.
  - ♦ Assign rights to any user, group, or role for existing searches, for which a group administrator has rights.

- **Manage Maintenance Process**: This privilege enables a group administrator to:
  - ♦ Create a new maintenance process.
  - ♦ Edit any existing maintenance processes (including schedule type, periodicity, and suspension flag).
  - ♦ Delete any existing maintenance processes.
  - ♦ Include to or remove from a maintenance process any maintenance tasks.

- **Manage News**: This privilege enables a group administrator to:

- ♦ Create global and group specific news.
- ♦ Edit global and group specific news.
- ♦ Delete global and group specific news.
- ♦ Delete expired news.
- ♦ Assign rights to any user, group, or role for existing group specific news.
- **Manage Maintenance Task**: This privilege enables a group administrator to:
  - ♦ Create a new maintenance task. When creating a maintenance task, group administrators can view only those document types, for which they have rights.
  - ♦ Edit existing maintenance tasks for document types, for which a group administrator has rights.
  - ♦ Delete existing filing tasks for document types, for which a group administrator has rights.
- **Manage Notifications**: This privilege enables a group administrator to:
  - ♦ Create a new notification using searches, for which a group administrator has rights.
  - ♦ Edit existing notifications, for which a group administrator has rights. The Notification Definition page shall contain only searches, for which a group administrator has rights.
  - ♦ Delete existing notifications, for which a group administrator has rights.
  - ♦ Assign rights to any user, group, or role for existing notifications, for which a group administrator has rights.
- **Manage Document Groups**: This privilege enables a group administrator to:
  - ♦ Create a new document group.
  - ♦ Edit existing document groups.
  - ♦ Delete existing document groups.
  - ♦ Include or remove from existing document groups any document types, for which a group administrator has rights.
- **Manage Document Types**: This privilege enables a group administrator to:
  - ♦ Create a new index field.
  - ♦ Edit existing index fields.
  - ♦ Delete existing index fields.
  - ♦ Upload a new model.
  - ♦ Edit existing models.
  - ♦ Delete existing models.
  - ♦ Create a new document type.
  - ♦ Edit existing document types the group administrator has rights for.
  - ♦ Delete existing document types the group administrator has rights for.
  - ♦ Assign rights to any user, group, or role for existing document types the group administrator has rights for.
  - ♦ Manage templates of existing document types the group administrator has rights for:
    - ○ Upload a new template.
    - ○ Edit existing templates the group administrator has rights for.
    - ○ Delete existing templates the group administrator has rights for.
    - ○ Assign rights to any user, group, or role for existing templates the group administrator has rights for.
- **Manage Filing Process**: This privilege enables a group administrator to:

- Create a new filing process.

- Edit any existing filing processes (including schedule type, periodicity, and suspension flag).

- Delete any existing filing processes.

- Include or remove from a filing process any filing tasks.

- **Manage Search Groups**: This privilege enables a group administrator to:

  - Create a new search group.

  - Edit existing search groups.

  - Delete existing search groups.

  - Include or remove from existing search groups any searches, for which the group administrator has rights.

❑ **Manage Filters**: After you select this check box, the **Manage Filters** button becomes visible. Click it to expand a hidden section, allowing you to assign roles and groups, which a group administrator can manage. To assign a role or group, drag it from the left pane to the right pane. This privilege enables a group administrator to:

- **Manage filters** of the following trustees:

  - Assigned roles and groups.

  - Any implicit or explicit members of assigned roles and groups.

- **Assign any filters** based on their filters. If they are restricted from seeing a particular keyword, then any filters in the set shall also include that restriction.

❑ **Manage Users**: After you select this check box, the **Manage Users** button becomes visible. Click it to expand a hidden section, allowing you to assign roles and groups, which a group administrator can manage. To assign a role or group, drag it from the left pane to the right pane. This privilege enables a group administrator to manage the assigned roles and groups.

❑ **Save**: Saves the settings.

❑ **Clear**: Clears all the boxes.

❑ **Cancel**: Cancels the operation.

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

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.

ABOUT SECURITY KEYWORDS

Security keywords provide a way of limiting the documents within a document type that a user can retrieve.

> **NOTES**
>
> If you don't want a user to retrieve any documents of a particular document type, you can remove that document type from the user. Secured keywords can be assigned to roles, user groups and users. When you assign a security keyword to a role, user group or user, the specified users can only retrieve documents that meet the criteria of the security keyword. No other documents of the specified document type can be retrieved by them.

For example, you have a **Homes for Sale** document type and you specify **Home Location** = **Lowell** as a security keyword (**Home Location** being an index field, and **Lowell** being an index value) for a particular user. As a result, the user can only retrieve documents of the **Homes for Sale** document type, in which **Lowell** occurs in the **Home Location** index field. Documents with **Home Location** other than **Lowell** (for example, **Leominster** or **Fitchburg**) are not available to the user.

See also .

GLOBAL SECURITY KEYWORDS

Global security keywords are similar to security keywords, except that global security keywords are automatically assigned to a document type if the document type uses the keyword as an index field. This capability is automatically applied to newly created document types that use the index field.

To assign a global security keyword to a role, user group or user

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

2. Click the name of the role, user group or user you want to assign global security keywords to.

3. Select the **Global Security Keywords** tab at the top of the page.

4. Click the **Add condition** button. A row of fields will appear.

| | AND ˅ | File Extension | ˅ | = | ˅ | | | 🔍 | ✖ |

5. Select a Boolean operator (**AND** or **OR**). While the **AND** operator can be used to link conditions for different keyword types, the **OR** operator can only be used to link conditions of the same keyword type.

6. Select a keyword type from the list.

7. Select a relational operator (equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=).)

8. Enter a keyword value. To look up available keyword values, click the **Lookup** button.

9. To add another condition, click the **Add condition** button and repeat steps 5-8. To remove a condition, click the **Remove** button.

10. Click **Save** to save the global security keyword configuration, then click **Save** on the Role (User Group or User) page to assign the global security keyword to the role (user group or user).

To get a list of documents that correspond to the saved global security keywords

1. Click the **Preview** button.

2. In the dialog box that appears, choose the document group and document type from the lists.

    The system will display a list of documents that correspond to the defined global security keywords. The list contains the following information:

    - Document name.
    - Document type.
    - Document data.

ASSIGNING SECURITY KEYWORDS TO ROLES, USER GROUPS OR USERS

When you assign security keywords to a role, user group or user, they can retrieve only those documents that meet the criteria of the security keyword. No other documents of the specified document type can be retrieved by them.

For example, you have a **Homes for Sale** document type and you specify **Home Location** = **Lowell** as a security keyword (**Home Location** being an index field, and **Lowell** being an index value) for a particular user. As a result, the

user can only retrieve documents of the **Homes for Sale** document type, in which **Lowell** occurs in the **Home Location** index field. Documents with **Home Location** other than **Lowell** (for example, **Leominster** or **Fitchburg**) are not available to the user.

To assign a security keyword to a role, user group or user

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

2. Click the name of the role, user group or user you want to assign security keywords to.

3. Select the **Security Keywords** tab at the top of the page.

4. From the **Document Groups** drop-down list, select the appropriate document group. The document types assigned to the selected document group will appear in the **Document Types** box.

> **NOTES**
>
> You can search for a document type by entering (part of) its name in the **Filter by** box and clicking the **Apply** button.

5. Click the **Add condition** button. A row of fields will appear.

AND ∨	File Extension ∨	= ∨		🔍 ✖

6. Select a Boolean operator (**AND** or **OR**). While the **AND** operator can be used to link conditions for different keyword types, the **OR** operator can only be used to link conditions of the same keyword type.

7. Select a keyword type. The list contains keyword types that are used in the selected document types.

8. Select a relational operator (equal to (=), not equal to (<>), less than (<), greater than (>), less than or equal to (<=), greater than or equal to (>=).)

9. Enter a keyword value. To look up available keyword values, click the **Lookup** button.

10. To add another condition, click the **Add condition** button and repeat steps 6-9. To remove a condition, click the **Remove** button.

11. Click **Save** to save the security keyword configuration, then click **Save** on the Role Role (User Group or User) page to assign the security keyword to the role (user group or user).

To get a list of documents that correspond to the saved security keywords

1. Click the **Preview** button.

2. In the dialog box that appears, choose the document group and document type from the lists.

   The system will display a list of documents that correspond to the defined security keywords. The list contains the following information:

   - Document name.
   - Document type.
   - Document data.

See also: Global Security Keywords.

DOCUMENT STATES SECURITY

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

2. Click the name of the role, user group or user you want to assign rights to change document state to.

3. Select the **Document States Security** tab at the top of the page.

4. From the **Document State Group** drop-down list, select the appropriate document state group. The list of document states assigned to the selected document state group appears.

5. Select the appropriate check boxes for each state:

   - **View**: allows to view the document state

   - **Set to this state**: allows to set to this document state

   - **Edit from this state**: allows to switch from this document state

6. Click **Save**.

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 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.

  - **SubAdmin**: Allows the user limited administration.

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

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

  - **Document Search**: Allows the user to configure searches.

  - **Save Search**: Allows users to save searches that they created to the database.

  - **Report search**: Allows the user to search and view original reports.

  - **Delete document**: Allows the user to delete documents from the report warehouse.

  - **Download Original Report**: Allows the user to download the archive copy of reports.

  - **Concatenate Original Reports**: Allows users to download a number of original PDF reports as a single file.

  - **Create annotation**: Allows the user to annotate documents.

  - **Create notification**: Allows the user to create notifications.

  - **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:

    *   **Group Administrator** tab allows you to grant limited administration rights to group administrators. To do this, select appropriate check boxes, and click **Save**.

    *   **Views** tab allows you to specify what views of the document search results page or 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.

    *   **Security Keywords** tab allows you to assign security keywords to the current role.

    *   **Global Security Keywords** tab allows you to assign global security keywords to the current role.

    *   **Report Security** tab allows you to grant access to report security rules for the current role. To do this, select a document group and a document type, then drag appropriate items from the left pane to the right pane, and click **Save**.

    *   **Document Types** tab allows you to grant access to document types for the current role. To do this, select a document group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

    *   **Unredacted Document Types** tab allows you to select document group and assign its document types for the role. To do this, select a document group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**. Document types from the **Assigned Document Types** pane will be assigned.

        When assigned, on the **Report** view, **Data** view, and **Summary** view data will be displayed in the unredacted format.

        For unassigned document types, data will be displayed in the redacted format.

> **NOTES**
>
> The **Unredacted Document Types** tab becomes available only if a redaction license is enabled in MS.

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

- **Searches** tab allows you to set the accessible searches for the current role. To do this, select a search group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

- **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**.

- **Search Notifications** tab allows you to assign search notifications to the current role. To do this, select a search from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

- **System Notifications** tab allows you to assign system notifications to the current role. To do this, drag appropriate items from the left pane to the right pane, and click **Save**.

- **Filing Notifications** tab allows you to assign filing notifications to the current role. To do this, drag appropriate items from the left pane to the right pane, and click **Save**.

- **Named Paths** tab allows you to assign named paths to the current role. To do this, drag appropriate items from the left pane to the right pane, and click **Save**.

NOTES

You can copy rights of a role, by clicking the **Copy Profile** button, available on the above mentioned tabs (except **Views** and **Report Security** tabs).

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 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.
     - **SubAdmin**: Allows the user limited administration.
     - **SaaS Administrator**: Allows the user limited administration.
     - **Portlets:** Allows the user to view Panopticon Designer Workbooks in MSClient.
     - **Document Search**: Allows the user to configure searches.
     - **Save Search**: Allows users to save searches that they created to the database.
     - **Report search**: Allows the user to search and view original reports.
     - **Delete document**: Allows the user to delete documents from the report warehouse.
     - **Download Original Report**: Allows the user to download the archive copy of reports.
     - **Concatenate Original Reports**: Allows users to download a number of original PDF reports as a single file.
     - **Create annotation**: Allows the user to annotate documents.
     - **Create notification**: Allows the user to create notifications.
     - **See trustee list on save Annotation**: Allows the user to view the list of trustees in the saved annotation report.
     - **See trustee list on save Search**: Allows the user to view the list of trustees in the saved search.
     - **Add attachments on Annotations**: Allows the user to add attachments to the annotation report.
     - **Create Annotations for all users**: Allows the user to create an annotation report accessible to all users.
     - **Edit and delete Annotations**: Allows the user to modify and remove annotations.
     - **See Annotations**: Allows the user to view the existing annotations.
     - **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 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 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 ![edit icon] . 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:

   - **Group Administrator** tab allows you to grant limited administration rights to group administrators. To do this, select appropriate check boxes, and click **Save**.

   - **Views** tab allows you to specify what views of the document search results page or 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.

   - **Security Keywords** tab allows you to assign security keywords to the current user group.

   - **Global Security Keywords** tab allows you to assign global security keywords to the current user group.

   - **Report Security** tab allows you to grant access to report security rules for the current user group. To do this, select a document group and a document type, then drag appropriate items from the left pane to the right pane, and click **Save**.

   - **Document Types** tab allows you to grant access to document types for the current user group. To do this, select a document group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

   - **Unredacted Document Types** tab allows you to select document group and assign its document types for the user group. To do this, select a document group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**. Document types from the **Assigned Document Types** pane will be assigned.

     When assigned, on the **Report** view, **Data** view, and **Summary** view data will be displayed in the unredacted format.

     For unassigned document types, data will be displayed in the redacted format.

NOTES

The **Unredacted Document Types** tab becomes available only if a redaction license is enabled in MS.

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

   - **Searches** tab allows you to set the accessible searches for the current user group. To do this, select a search group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

   - **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**.

- **Search Notifications** tab allows you to assign search notifications to the current user group. To do this, select a search from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

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

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

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

> **NOTES**
>
> You can copy rights of a role, by clicking the **Copy Profile** button, available on the above mentioned tabs (except **Views** and **Report Security** tabs).

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.

     ◆ **SubAdmin**: Allows the user limited administration.

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

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

     ◆ **Document Search**: Allows the user to configure searches.

     ◆ **Save Search**: Allows users to save searches that they created to the database.

     ◆ **Report search**: Allows the user to search and view original reports.

     ◆ **Delete document**: Allows the user to delete documents from the report warehouse.

     ◆ **Download Original Report**: Allows the user to download the archive copy of reports.

     ◆ **Concatenate Original Reports**: Allows users to download a number of original PDF reports as a single file.

     ◆ **Create annotation**: Allows the user to annotate documents.

     ◆ **Create notification**: Allows the user to create notifications.

     ◆ **See trustee list on save Annotation**: Allows the user to view the list of trustees in the saved annotation report.

     ◆ **See trustee list on save Search**: Allows the user to view the list of trustees in the saved search.

     ◆ **Add attachments on Annotations**: Allows the user to add attachments to the annotation report.

     ◆ **Create Annotations for all users**: Allows the user to create an annotation report accessible to all users.

     ◆ **Edit and delete Annotations**: Allows the user to modify and remove annotations.

     ◆ **See Annotations**: Allows the user to view the existing annotations.

     ◆ **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**.

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:

   - **Group Administrator** tab allows you to grant limited administration rights to group administrators. To do this, select appropriate check boxes, and click **Save**.

   - **Views** tab allows you to specify what views of the document search results page or 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.

   - **Security Keywords** tab allows you to assign security keywords to the current user.

   - **Global Security Keywords** tab allows you to assign global security keywords to the current user.

   - **Report Security** tab allows you to grant access to report security rules for the current user. To do this, select a document group and a document type, then drag appropriate items from the left pane to the right pane, and click **Save**.

   - **Document Types** tab allows you to grant access to document types for the current user. To do this, select a document group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

   - **Unredacted Document Types** tab allows you to select document group and assign its document types for the user. To do this, select a document group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**. Document types from the **Assigned Document Types** pane will be assigned.

     When assigned, on the **Report** view, **Data** view, and **Summary** view data will be displayed in the unredacted format.

     For unassigned document types, data will be displayed in the redacted format.

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

- **Searches** tab allows you to set the accessible searches for the current user. To do this, select a search group from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

- **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**.

- **Search Notifications** tab allows you to assign search notifications to the current user. To do this, select a search from the list, then drag appropriate items from the left pane to the right pane, and click **Save**.

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

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

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

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.

DOCUMENT STATE GROUPS

A document state group is a classification of document states. Each document group contains one or more document states. All document state groups used in the system are listed on the Document State Groups page.

To display the Document State Groups page, click **Rights and Privileges** on the Navigation Tree, and select **Document State Groups**.

Use this page to <u>add</u>, <u>edit</u> or <u>remove</u> document state groups.

Adding a Document State Group

To add a document state group

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

2. Click ➕ on the **Document State Groups** page. The Document State Group page appears.

3. Enter a unique name of a new document state group in the **Name** field.

4. Enter any text defining the document state group in the **Description** field. This step is optional.

5. To add document state, click the **Add** button.

6. Enter the document state name in the **Document State** field, and then click the **Save** button. For more information, see <u>Add new document states.</u>

7. Click **Save**.

Editing a Document State Group

To edit a document state group

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

2. Select the name of the document state group you want to edit. Click the name of the document state group or click anywhere on the row, and then click ✏ . The **Document State Group** page appears.

3. Make the necessary changes

   - <u>Edit document state group name and description</u>
   - <u>Add document states</u>
   - <u>Edit document states</u>
   - <u>Delete document states</u>

4. Click **Save**.

Deleting a Document State Group

To delete a document state group

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

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

3. Click **Delete** to delete the document state group from the list.

Document States

Document states are used to indicate the current state of a document. An administrator defines the set of document states for each document state group. Every document state group has a fixed default state.

NOTES

Default state can be edited but cannot be deleted.

All document states of the particular document state group are listed on the Document State Group page. To display this page, on the Navigation Tree, click **Rights and Privileges**, then click **Document State Groups** and select necessary document state group from the list.

Use this page to add, edit or remove document states.

Adding a Document State

To add a document state

1. Click the **Add** button on the **Document State Group** page.

2. Enter the document state name in the **Add Document State** dialog box.

3. Click **Save**.

Editing a Document State

To edit a document state

1. On the **Document State Group** page, click by the name of the document state you want to edit.

2. Enter the document state name in the **Edit Document State** dialog box.

3. Click **Save**.

Deleting a Document State

To delete a document state

1. On the **Document State Group** page, click at the end of the row with the document state you want to delete.

2. Click **Delete** to delete the document state from the list.

3. Click **Save**, to save the changes.

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

❑ Locale settings

❑ Color theme

❑ Server locations settings

❑ RMS Settings

❑ Exception Dates

❑ Bulk Schedules Edits

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**: Manage e-mail, offline results, security and storage settings.

❑ **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.

❑ **Locations Management**: Set your server location preferences.

❑ **Named Path**: Manage named paths.

❑ **RMS Settings**: Set RMS settings.

❑ **Exception Dates**: Set Exception dates.

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.

- **Allow empty date range in documents/reports search**: Select this check box to permit empty date range in documents/reports search results list.

- **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.

- **Display "data" items in the Client navigation tree**: Select this check box, if you want individual items to be displayed on the MSClient Navigation Tree upon double-clicking. For example, if this option is selected, and you click **Saved Views**, the **Saved View** groups will appear on the Navigation Tree, allowing direct navigation to the **Saved View** group you select.

- **Expand Administrator Tree**: Select this check box, if you want the MSAdmin Navigation Tree to be expanded to second-level navigation options by default.

- **Expand Client Tree**: Select this check box, if you want the MSClient Navigation Tree to be expanded to second-level navigation options by default. This action is available to users, only if they have selected **Tree-based** navigation on the **Site Style** tab under **Preferences** in MSClient.

- **Enable text download in Report View**: Enables users to download text copies of a selected report.

- **Enable PDF download in Report View**: Enables users to download PDF copies of a selected report.

- **Wrap text in PDF Export on Dynamic View**: Select this check box, if you want the text to wrap to a new line, when the edge of a page is reached.

- **Allow using Latest Reports on search**: If you select this check box, MSAdmin and MSClient users will be able to include in their searches only those reports that were added to the system during the last filing.

- **Display dynamic users entitlement report**: Select this check box to add Dynamic User Entitlements Report to [Transaction Reports](#).

- **Allow Mail sending on Client**: Select this check box to allow using Mail sending on client app.

- **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.

- **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.
- **Admin Host and Port**: Specify the name of the Monarch Server Admin Host and Port.
- **Client Host and Port**: Specify the name of the Monarch Server Client Host and Port.
- **Administrator E-mail Address**: Specify the ES administrator's e-mail address.
- **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.

❑ **Whitelist of recipient domans (e.g. "domain1.com, domain2.com"):** Specify the approved email domains.

❑ **Use whitelist of recipient domains**: Select this check box if you want to use the whitelist of recipient domains.

❑ **Test Email**: Click the button to test email settings.

❑ **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.

Offline Result Settings

❑ **Offline result expiration in days**: Specify the number of days, on the expiry of which offline results are deleted.

Security Settings

❑ **Allow SubAdmin privilege**: Select this check box, if you want to make the **SubAdmin** privilege available, when adding a user, group or role.

❑ **Allow SaaSAdmin privilege**: Select this check box, if you want to make the **SaaSAdmin** privilege available, when adding a user, group or role.

❑ 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.

  ♦ 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

  ♦ **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 Client**: Specify the maximum number of attempts to log in using the wrong user name or password, on MSClient.

Storage Settings

❑ **Partition size**: Specify the partition size in days. After the expiration of this period a new partition will be created in the database.

❑ **Maximum files count in SubVolume**: Specify the maximum number of files allowed in the subvolume.

❑ **Maximum number of simultaneous full-text searches**: Specify the maximum number of users allowed to simultaneously perform full-text search.

❑ **Number of partitions used in keyword lookup**: Specify the number of partitions to be included in the list of available index values.

❑ **Document AutoName for failed reports**: Define the default auto-naming scheme to be used for naming documents in case of system errors.

❑ **Report AutoName for failed reports**: Define the default auto-naming scheme to be used for naming reports in case of system errors.

❑ **Enable padding in Autoname**: Select this check box, if you want different field values in the names of documents and files to be vertically aligned, by inserting space characters at the beginning of their names.

❑ **Enable cross-filtering by Keywords**: Select this check box, if you want to turn-on cross-filtering by keywords on the search in client.

❑ **Enable cross-filtering by Security Keywords**: Select this check box, if you want to turn-on cross-filtering by security keywords on the search in client.

❑ **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:

System defaults

❑ **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.

Storage defaults

❑ **Volume Path**: Enter the path to the volume or click the **Browse** button to locate it.

❑ **Location**: Select location for storage volume.

❑ **Maximum Volume Size**: Enter the maximum size of the volume measured in megabytes or gigabytes depending on the value you select from the list at the right.

❑ **Maximum Sub-Volume Size**: Enter the maximum size of the sub-volume measured in megabytes or gigabytes depending on the value you select from the list at the right.

Filing Task defaults

❑ **Filing Task Path**: Specify the default path to a folder containing files to be processed.

❑ **Location**: Select the name of a server from the list.

> **NOTES**
>
> If the required server is not on the list, refer to Locations Management topic to add a new location.

File processing after filing

Select one of the options listed below, which describe actions for filing files after processing.

❑ Leave input files where they are

❑ Delete input files

❑ Move input files to the location: Specify the location.

❑ Move files causing errors to folder: Select this check box, if you want to move files causing errors to a special folder and specify the path to the folder.

❑ Automatically start task when a new file appears: Select this check box, if you want the task to start automatically when a new file appears.

❑ Log performance statistics: Select this check box, if you want to collect logging information about filing tasks.

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
Home Page	Default home page (or tab), which is the first page to be displayed when a user logs on to MSClient.
Document Search page	**Document Search** page to be opened, when you click the Document Search tab.
Report Search page	**Report Search** page to be opened, when you click the Report Search tab.
Document Sorting	Default sort order for search results displayed on the **Document List**.
Report Sorting	Default sort order for search results displayed on the **Report List**.
Maximum Search Result Items	The maximum number of documents that can be listed on the **Document List**.
Display all document/report results	Select this check box to display all document/report results on a single page
Allow multiple Document Type selection in Simple	Select this check box to allow selecting multiple document types when performing simple search.

SETTING	DESCRIPTION
Search	
Reuse last search query conditions	Select this check box for the system to remember the dates specified for Simple or Advanced Document/Report Search and to display them when you return to the search page.
Show query info in toolbar	Select this check box to enable the query info toolbar when viewing documents/reports.
Close the popup views toolbar on mouse over	Select this check box for the **Views** toolbar to disappear when the mouse pointer is moved away from it.
Direct view on single result on Reports List	Select this check box to enable direct opening of the report view when clicking its name. This is only valid if the user has the rights only for one type of report view.
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.
Document List Settings	**Count document list items** Specify a numeric value as the default quantity of document list items.
Report List Settings	**Count report list rows**: Specify a numeric value as the default quantity of report list items
Report View	**Count pages** The maximum number of documents that can be displayed on the 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.

SETTING	DESCRIPTION
	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**
	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
Site Style	**Tabs-based**: This site style horizontally divides the MSClient interface. The top portion of the tab-based interface contains tabs, which provide access to the sections of the application. The bottom portion of the tab-based interface displays the page that corresponds to the selected tab.
	Tree-based: This site style vertically divides the MSClient interface into two halves or panes. The left pane contains the Navigation Tree, which

SETTING	DESCRIPTION
	provides links to the various sections of the application, while the right pane displays the page that corresponds to the selected section.
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.
❑ **Maximum allowed attachment size (Kb)**: Enter the maximum allowed attachment size in kilobytes.
❑ **Count of keywords per page**: Defines the number of keywords per page in a **Keyword** dialog box used for searching keywords. Select a value from the list. The default value is set to 10.
❑ **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.

❑ **Report view page count (If empty, user preferences are used)**: Select a value from the list, to define the number of pages in a report view. The default setting is **None**.

❑ **Default date range for documents/reports search (leave empty for empty default date range)**: In this box enter a default date range for document or report search.

❑ **Maximum number of Documents/Reports to be returned by query**: In this box enter the maximum number of documents or reports to be returned by query.

❑ **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.

❑ **Optional columns visibility**: Choose which document properties to display or hide in the documents/reports list.

- Document Type
- Document Date
- State
- Annotated
- Native
- Original
- Premined
- Offline
- Report Size

❑ **Content Home Page Settings**: Choose which pane to display or hide in the MSClient home page.

- News
- Work List
- Favorite Searches
- Offline Tasks

NOTES

When no pane is selected, the MSClient home page will be empty.

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).
- **PDF - Annotation Footer Size**: Specify the margin space size for annotations (in inches).
- **PDF - Annotation Font Size**: Specify font size for annotations printed in a footer.
- **PDF - PDF Split Size For Production**: Specify the number of pages to be concatenated to produce a final result.
- **Save**: Saves the settings.
- **Clear**: Clears all the boxes.
- **Cancel**: Cancels the settings.

Locations Management

To manage your location preferences

1. On the Navigation Tree, click **System Settings** and select **System Preferences**.
2. On the displayed page select the **Locations Management** tab.

To set the default location name for all the object that have location as their parameter

1. Select location name from the **Default Location** list.
2. Click the **Save** button.

To add new location

1. Click the **Add New Location** button ╋and enter the new location name in the **Location** field.
2. Click the **Save** button. The new location will appear on the list.

To edit location

1. Click the name of the location you want to edit or click anywhere on its row, and then click ✎ .
2. Make you changes.
3. To save your changes, click the **Save** button.

To remove location

1. Click ✖ at the end of the row with the location you want to delete.
2. Click **Delete** to confirm.

> **NOTES**
>
> In case of single server installation refer to "Monarch Server Configurator Guide" to change location settings.

Named Paths

Use the **Named Paths** page to add, edit and delete named paths.

To access the Named Paths page

1. On the Navigation Tree, click **System Settings** and select **System Preferences**.
2. At the top of the page select the **Named Paths** tab.

To add a new named path

1. Click the **Add** icon ✎ .
2. Enter a path name in the **Name** field.
3. Select the path group in the **Path Group** field.

    Path Group options:
    - **Common**: The named path is available to all items.
    - **Filing Task**: The named path is available to filing task path.
    - **Model Dependencies**: The named path is available to model dependencies (to replace path).
    - **Preprocess Converter**: The named path is available to preprocess converter item (for filing task).
    - **Storage Volume**: The named path is available to the storage volume.
    - **Virtual Path**. The named path is available to virtual paths.
4. Select location in the Location field.
5. Select **Create folder allowed** to allow user for a folder creation in the file system.
6. Select **Browse from root** to make the whole file system of a selected location is accessible to the user
    or
    Enter the path in the **Path** field. In this case only files and folder within the path selected are accessible to the user.
7. Click the **Save** button.

To edit a named path

1. Click the name of the named path you want to change or click anywhere on the row, and then click ✎ .
2. Make necessary changes. For details, see To add a new named path.

To assign rights to a named path

---

1. Click the **Rights** tab found beside the **Named Paths** tab.

2. If you want the selected named path to be available to all users, select the **Global** checkbox.

3. Under **User Groups**, choose the user groups to which the named path should be assigned by dragging and dropping them from the **Available User Groups** pane to the **Selected User Groups** pane.

4. Under **Roles**, choose the roles to which the named path should be assigned by dragging and dropping them from the **Available Roles** pane to the **Selected Roles** pane.

5. Under **Users**, choose the users to which the named path should be assigned by dragging and dropping them from the **Available Users** pane to the **Selected Users** pane.

6. Click the **Save** button to save all changes.

To delete a named path

1. On the **Named Paths** page select the project location you want to delete.

2. Click ✏ at the end of the row with the named path you want to delete.

3. Click **Delete** to remove the named path from the list.

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.

Exception Dates

Use the **Exception Dates** page to add, edit and delete exception rules for disabling the running of certain processes at specific dates (e.g. holidays like New Year celebrations).

NOTES

At the date with a set exception, user will get a notification with a list of processes that will not be run that day.

To access the Exception Dates page

1. On the Navigation Tree, click **System Settings** and select **System Preferences**.
2. At the top of the page select the **Exception Dates** tab.

To add a new exception date

1. Click the **Add** icon ➕.
2. Enter an Exception Date name in the **Name** field.
3. Enter a Description.
4. Select the **Suspended** checkbox if you want to suspend the current Exception Date.
5. Select the **Postpone Process execution** checkbox if you want to execute the process immediately after the exception date. To let the process run on the set schedule, leave this option unchecked.
6. Choose **Affected Processes** by selecting the respective checkboxes.
7. For each affected process type, you may assign any or all of the available processes to the exception date.
   a. Click on the process type to open the list of available processes.
   b. Drag the preferred process to be assigned from the left panel to the right panel or click the add button ➕ .
   c. To remove an assigned process, drag it from the right panel to the left panel or click the delete button ➖ .

NOTES

You may also select all processes available for all process types by clicking **Select All** or remove all selected processes for all process types

by clicking **Select None**.

If all available processes are assigned by clicking the **Add** button or **Add All** button, then all new processes will be added to the Available Processes list and will not be assigned to the exception date.

If all available processes are assigned by clicking the checkbox or **Select All** button, then all new processes will be assigned to the exception date.

8.   Set up **Exception Frequency** by either selecting a single date or indicating a daily, weekly, or monthly occurrence.

In setting up the Exception Frequency, you can set all-day occurrence or set a specific timeframe.

9.   Click the **Save** button.

To edit an exception date

1.   Click the name of the exception date you want to change or click anywhere on the row, and then click ✎ .

2.   Make necessary changes. For details, see To add a new exception date.

To delete an exception date

1.   Click ✖ at the end of the row with the exception date you want to delete.

2.   Click **Delete** to remove the exception date from the list.

VIRTUAL PATHS

All virtual paths in the system are listed on the Virtual Paths page. To display this page, click **System Settings** on the Navigation Tree, and select **Virtual Paths**.

The list shows:

❑   Virtual Path Name

❑   Virtual Path Location

❑   File Path

Use this page to add, edit, or remove virtual paths from the list.

Adding a Virtual Path

To add a virtual path

1.   On the Navigation Tree, click **System Settings**, and select **Virtual Paths**.

2.   Click ✛ on the **Virtual Paths** page. The **Virtual Path** page appears.

3.   Enter the path name in the **Virtual Path Name** field.

4.   Specify the CORBA name of the server in the **Location** field, which you can select from the list.

5.   Specify the path to a folder containing files to be processed in the **File Path** field or click the **Browse** button to navigate to it.

6. To save the new virtual path, click **Save**.
   The system saves the modified virtual path and displays the updated **Virtual Paths** page, if the operation is completed successfully.

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

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

Editing a Virtual Path

To edit a virtual path

1. On the Navigation Tree, click **System Settings**, and select **Virtual Paths**.

2. Click the name of the virtual path you want to edit or click anywhere on the row, and then click ✏ . The **Virtual Path** page appears.

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

4. To save the changes, click **Save**.
   The system saves the modified virtual path and displays the updated **Virtual Paths** page, if the operation is completed successfully.

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

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

Deleting a Virtual Path

To delete a virtual path

1. On the Navigation Tree, click **System Settings**, and select **Virtual Paths**.

2. Do one of the following:

   - Select the virtual path you want to delete, by clicking anywhere on the row, and then click ✖.

   - Click ✖ at the end of the row with the virtual path you want to delete.

   A dialog box appears.

3. Click **Delete,** to delete the virtual path from the list.

LOCALE MANAGEMENT

A locale is a group of settings that determine the language, time format, date format, currency symbol, and so on. The existing locales are listed on the Locale Management page.

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

Use this page to edit locales.

The Locale Management page contains the following items:

❑ **Locale group**: Select from the list of options.

   - Select **Admin**, if you need to edit labels appearing only in MSAdmin.

   - Select **Client**, if you need to edit labels appearing only in MSClient.

   - Select **Common**, if you need to edit labels appearing both in MSAdmin and MSClient.

- Select **Service**, if you need to edit labels appearing in System Reports.
- Select **Dynamic View**, if you need to edit labels appearing in the Dynamic View in MSClient.

❑ **Locale Language**: Select a language from the list. This list includes languages that were selected during the installation.

❑ **Search**: You can search for a label, by typing its name in this box.

❑ **Constant name**: The list displays names of fields as they appear in code, to facilitate tracking their location.

❑ **Original name**: The list displays all labels appearing on the user interface.

❑ **New Name**: The list displays all labels appearing on the user interface after localization.

❑ **Reload** icon ⟳ : Click this icon to reload the grid.

❑ **Edit** icon ✎ : To edit a label, click anywhere on the row and click this icon. The **Edit Record** dialog box appears. Type the new name into a box and click **Submit**.

NOTES

You can open the **Edit Record** dialog box by clicking anywhere on a row.

You can edit labels in one of the following ways:

- One by one:
  - ♦ Click the name of a label.
  - ♦ Type a new name in the **Edit Record** dialog box.
- All at once:
  - ♦ Select the **Import Resources** tab.
  - ♦ After editing, click the **Upload** button to browse for an .xml file containing the list of all localized labels. Labels from the selected file will be uploaded and displayed on the Locale Management page.

NOTES

When necessary, company logos can be changed in Locale Management.

To do so, modify the following constants under the **Common Locale Group**.

- Theme_LoginPageLogoUri: To change the logo in the login page
- Theme_HeaderLogoUri: To change the header logo
- Theme_ShortcutIconUri (to change the shortcut icon)

To download the edited labels, click the **Export Resources** tab.

The Export Resource page contains the following items:

- **Locale Language**: Select a language from the list. This list includes languages that were selected during the installation.
- **Export Resources**: Click this button to open or download an .xml file, containing the list of all labels.
- **Export only overridden resources**: Select this check box, to export only overridden resources.

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
   - **Client theme** from the list, select a theme for Client application
   - **RMS Client theme** from the list, select a theme for RMS Client application
3. Click **Save**.

NOTES

For the changes to take effect, relogon is required.

PREPROCESS CONVERTERS

Third party utilities are used by the system for processing files with foreign, non-standard formats.

These utilities are installed separately by the deployment team.

To add a third-party utility

1. Click **System Settings** on the Navigation Tree, and select **Preprocess Converters**.
2. Click ➕ on the **Preprocess Converters** page.
3. Enter the converter name in the **Name** field.
4. Enter the path to the utility executable file or click the **Browse** button to locate it.
5. Enter command parameters in the **Command Parameters** field.

To delete a third-party preprocess converter

1. Select the converter you want to delete, by clicking anywhere on the row, and then click ✖.
2. Click ✖ **Delete** button to confirm deletion.

NOTES

Utilities can be removed from the system only when they are not being used in any Filing Tasks.

BULK SCHEDULES EDITS

The **Bulk Schedules Edits** feature allows you to apply bulk editing of schedules to Filing Processes, Maintenance Processes, Offline Processes, Filing Notifications, and Search Notifications.

To use bulk schedule editing

1. On the Navigation Tree, click **System Settings**, and then select **Bulk Schedules Edits**.

2. On the displayed page, select the **Find a Schedule** tab.

3. In the **Select Process Type** field, select the process you want to edit from the drop-down list. The available options are:

   - Filing Processes

   - Maintenance Processes

   - Offline Processes

   - Filing Notifications

   - Search Notifications

4. Select the **Include Suspended** check box, if you need the suspended schedules to be displayed.

5. In the **Search Criteria** section, specify the time parameters of the schedule you want to change.

   You can get onscreen all schedules of the selected type by clicking the **All** button. You can also get onscreen the schedules with a certain value by selecting **Schedule** or **Next Execution Time**.

   NOTES

   In the Search and Next Execution Time criteria, you can leave the fields empty to display all corresponding schedules.

   Click **Find**.

   The list of corresponding processes is displayed.

6. Select the Replace a Schedule tab.

7. In the **Execution Frequency** section, specify the time parameters of the schedule you want to change.

8. Specify the processes you want to re-schedule by enabling corresponding check boxes.

9. Click **Replace** to apply your changes.

If you need to suspend or resume any schedule, you can select it in the list and click the **Suspend/Resume selected Schedules** icon.

NEWS

MSAdmin provides the News Message feature as a way to easily share information with other Monarch Server users. You can post news messages on the All News and Global News pages. After posting a message, you specify which Monarch Server 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 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 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 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 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.

❑ Annotation reports provide information about annotations to reports.

❑ Removed Reports provide information about reports that were removed from **Read-Only** volumes.

CONFIGURATION REPORTS

Configuration reports provide information about the current configuration of various parts of the Monarch Server 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.

❑ Storage Groups: Lists the existing storage groups, their assigned volumes, their location, etc.

❑ Document Groups: Lists the existing document groups, their assigned document type(s), their encoding, their index and report models, etc.

❑ Index Fields: Lists the existing index fields, and provides their ID numbers, type and length limit.

❑ 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.

❑ Maintenance Tasks: Lists the existing maintenance tasks, their last start and finish dates, etc.

❑ Filing Tasks: Lists the existing filing tasks, their last start and finish dates, etc.

❑ Security: Lists user's security attributes.

❑ Model Indexes: Reports on problems where mapping of Monarch model fields does not correspond to index fields due to model changes subsequent to document type configuration.

❑ Document Type Security: Lists all existing users, groups and roles the document type is available for.

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. 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.

Storage Groups Report

A Storage Groups report is one of the configuration reports provided by Monarch Server. This report includes all existing storage groups, and provides the following information about them:

- ❑ The maximum sub-volume size specified for the groups
- ❑ The number of sub-volumes assigned to the groups
- ❑ The names of the volumes assigned to the groups
- ❑ The location of the volumes (for example, the name of a server, on which they reside)
- ❑ The paths of the volumes
- ❑ The current size of the volumes

To view and print a Storage Groups configuration report

1. On the Navigation Tree, click **System Reports** and select **Configuration**.
2. Click the **Storage Groups** link. The Storage 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.

NOTES

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

Document Groups Report

A Document Groups report is one of the configuration reports provided by Monarch Server. This report includes all existing document groups, and provides the following information about them:

❑ Document types assigned to each document group

❑ Encoding formats (e.g., ASCII or Windows-1251) of the document types

❑ Autoname strings for each document type

❑ Index and report models for each document type

❑ Storage group, in which the document types are located

❑ Report name

❑ List of assigned indexes

To view and print a Document Groups configuration report

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

2. Click the **Document Groups** link. The Document 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.

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

Index Fields Report

A Index Fields report is one of the configuration reports provided by Monarch Server. This report includes all existing index fields, and provides the following information about them:

❑ Names of index fields

❑ Type of each index field (that is, string, number or date)

❑ Limit (that is, the maximum length) for each string or number index field

To view and print an Index Fields configuration report

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

2. Click the **Index Fields** link. The Index Fields 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. 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. 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.

NOTES

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

Users Report

A Users report is one of the configuration reports provided by Monarch Server. 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

NOTES

Information about full names and e-mail addresses is provided only if it was specified when an administrator added users to the system.

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.

NOTES

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

Maintenance Tasks Report

A Maintenance Tasks report is one of the configuration reports provided by Monarch Server. This report includes all existing maintenance processes and their assigned maintenance tasks, and provides the following information about them:

❑ Names of maintenance processes

❑ Execution frequency of each maintenance process

❑ Maintenance task(s) assigned to each process

❑ Type of each maintenance task (for example, a **Delete** task, a **Move** task, and so on)

❑ Criteria for document selection (for example, a **From...To** date range, the count of documents, the document age in days, and so on) for each maintenance task

❑ Document types assigned to each maintenance task

To view and print a Maintenance Tasks configuration report

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

2. Click the **Maintenance Tasks** link. The Maintenance 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.

Filing Tasks Report

A Filing Task report is one of the configuration reports provided by Monarch Server. This report includes all existing filing processes and their assigned filing tasks, and provides the following information about them:

❑ Names of filing processes

❑ Execution frequency of each filing process

❑ Filing task(s) assigned to each process

❑ File name mask of each filing task

❑ Location (that is, the server) to which reports are filed

❑ Post-processing actions (for example, leave, move, etc.)

❑ Document types assigned to each filing task

❑ Default indexes (if specified) of each filing task

To view and print a Filing Tasks configuration report

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

2. Click the **Filing Tasks** link. The Filing 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.

Security Configuration Report

A Security report is one of the configuration reports provided by Monarch Server. This report includes all existing users and their assigned rights, and provides the following information about them:

❑ User Name and internal ID

❑ Assigned user groups and roles

❑ Assigned security keywords

To view and print a Security configuration report

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

2. Click the **Security** link. The Security 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.

Model Indexes Configuration Report

A Model Indexes report is one of the configuration reports provided by Monarch Server. This report lists all cases when mapping of Monarch Model fields does not correspond to Index Fields due to model changes subsequent to Document Type configuration.

If an exception is encountered, the report will display it in the following format:

```
ID NAME

-------------------------------

101 Document Type Sample

-------------------------------

Passenger field is mapped for Document Type Sample, but is not existing in current mod
el.

-------------------------------
```

To view and print a Security configuration report

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

2. Click the **Model Indexes** link. The Model Indexes 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.

Document Type Security Report

A Document Type Security report is one of the configuration reports provided by Monarch Server. This report includes all existing users, groups and roles of the document type, and provides the following information about them:

❑ Document type name and ID

❑ List of users the document type is available for

- List of groups the document type is available for
- List of roles the document type is available for

To view and print a Document Type Security configuration report

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

2. Click the **Document Type Security** link. The Document Type Security 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.

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:

- Document Actions — Lists the time, date, user, etc., of document actions.
- Report Actions — Lists the time, date, user, etc., of report actions.
- Search Actions — Lists the time, date, user, etc., of search actions.
- Security — Lists the time, user name, and log on/log off information.
- Filing — Lists the time, user name and filing process information.
- Maintenance — Lists the time, user name, and maintenance task information.
- System — Lists system status information (e.g., whether the e-mail system has been started, the sub-volumes have been mounted, etc.).
- Reports Archived — Lists information about each report stored into Monarch Server
- 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.
- Deleted Documents — Lists detailed information about deleted documents.
- Report Variance — Lists information about read-only volume's storage changes (i.e. non-existence or inequality of several zip storages).
- Deleted Filing Results — Lists information deleted filing results.
- Audit Entity Actions — Lists information about audit entity actions.
- Dynamic Users Entitlement — List information about dynamic users entitlement (available if the corresponding check box is selected in System Preferences)
- Dynamic Login Requests — Lists information about dynamic login requests in RMS Client.

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.

Document Actions Report

A Document Actions Report is one of transaction reports provided by Monarch Server. This report provides the following information:

❑ Time when documents were viewed

❑ Name(s) of user(s) who viewed the documents

❑ Document(s) viewed by user(s)

To view and print a Document Actions transaction report

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

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

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

> **NOTES**
>
> If you do not provide a date or time period, all document 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 document actions for all users, select **All Users**.)

5. From the **Document Groups** list, select a document group, to which the desired document type(s) is assigned.

6. From the **Document Types** pane, drag appropriate items to the **Assigned Document Types** pane.

7. If you want to view actions for one document only, click the **Show Documents** button under the panes. The **Documents** list will display all documents of the selected document types. You can select one document to be included in the report.

> **NOTES**
>
> By default the **All Documents** option is set in the **Documents** list.

8. Click **View**. The Document Actions transaction report is displayed.

9. 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.

Report Actions

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

❑   Time when reports were viewed

❑   Name(s) of user(s) who viewed the reports

❑   Reports(s) viewed by user(s)

To view and print a Report Actions transaction report

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

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

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

NOTES

If you do not provide a date or time period, all report 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 report actions for all users, select **All Users**.)

5. From the **Document Groups** list, select a document group, to which the desired document type(s) is assigned.

6. From the **Document Types** pane, drag appropriate items to the **Assigned Document Types** pane.

7. If you want to view actions for one report only, click the **Show Documents** button under the panes. The **Reports** list will display all reports of the selected document types. You can select one report.

NOTES

By default the **All reports** option is set in the **Reports** list.

8. Click **View**. The Report Actions transaction report is displayed.

9. 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.

Search Actions Report

A Search Actions Report is one of transaction reports provided by Monarch Server. This report provides the following information:

❑   Time when the search was performed

❑   Name of a user(s) who performed the search(es)

❑   Search(es) performed by a user(s)

To view and print a Search Actions transaction report

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

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

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

NOTES

If you do not provide a date or time period, all search 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 search actions for all users, select **All Users**.)

5.   From the **Search Groups** list, select a search group. The searches assigned to it appear in the **Search** box.

6.   Select a search in the **Search** box, then click **View**. The Search Actions Transaction Report is displayed.

7.   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.

Security Report

A Security Report is one of transaction reports provided by Monarch Server. 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 [Converting a report to another format](#).

Filing Report

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

❏   Date and time when each filing process and task began and finished running.

❏   Names of filing processes.

❏   Filing task(s) assigned to each process.

❏   Error message for any task or process that failed to run.

To view and print a Filing transaction report

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

2. Click the **Filing** link. The Filing Report page is displayed.

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

4. Click **View**. The Filing 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.

Maintenance Report

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

❑   Date and time when each maintenance process and task began and finished running.

❑   Names of maintenance processes.

❑   Maintenance task(s) assigned to each process.

❑   Error message for any maintenance task or process that failed to run.

To view and print a Maintenance transaction report

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

2. Click the **Maintenance** link. The Maintenance Report page is displayed.

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

4. Click **View**. The Maintenance 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.

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

System Report

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

❑ Date and time when each system action occurred.

❑ List of system actions that have occurred.

To view and print a system transaction report

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

2. Click the **System** link. The System Report 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**
>
> If you do not provide a date or time period, all system actions will be displayed.

4. Click **View**. The System 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](#).

Reports Archived

Reports Archived Report is one of the transaction reports provided by Monarch Server. This report provides the following information:

❑ Date of report filing

❑ Report name

❑ Number of report files processed in the task

❑ Total number of documents contained in the files

❑ Maximum number of lines per document

❑ Total number of pages filed

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

2. Click the **Reports Archived** link. The Reports Archived 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 Reports Archived 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](#).

Added Users Report

Added Users Report is one of transaction reports provided by Monarch Server. 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.

Deleted/Suspended Users Report

A Deleted/Suspended Users Report is one of transaction reports provided by Monarch Server. 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 [icon] 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] icon at the top of the page, then click **OK** in the **Print** dialog box.

Users Not Logged In Report

A Users Not Logged In Report is one of transaction reports provided by Monarch Server. 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 [icon] 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.

Deleted Documents Report

A Deleted Documents Report is one of transaction reports provided by Monarch Server. This report provides the following information:

❑ ID of a deleted document

❑ Detailed information about the document (volume name, storage group name, user name, report name, document date, date and time of deletion, path).

To view and print a Deleted Documents transaction report

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

2. Click the **Deleted Documents** link. The Deleted Documents page is displayed.

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

4. From the **User** list select a user, to view documents deleted by them.

5. From the **Document Groups** list, select a document group, containing deleted documents that you want to view.

6. From the **Assigned Document Types** list, select an appropriate document type.

7. Click **View**. The Deleted Documents Transaction Report is displayed.

8. 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.

Report Variance

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

- ❑ ID of a missing or corrupted file
- ❑ Variance Type
- ❑ Detailed information about the file (report date, filling date, document type, report name, file size in the database and file size the storage).

To view and print the Report Variance transaction report

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

2. Click the **Report Variance** link. The Report Variance page is displayed.

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

NOTES

If you do not provide a date or time period, all report variance actions will
be displayed.

4.   From the **Document Groups** list select a document group.

5.   From the **Document Types** pane drag an appropriate item(s) to the **Assigned Document Types** pane.

6.   Click **View**. The Report Variance Report is displayed.

7.   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 Filing Results Report

A Deleted Filing Results Report is one of transaction reports provided by Monarch Server. This report provides the following information:

❑   Date and time when filing results were deleted

❑   Name of a user who deleted filing results

❑   Name of a filing task

To view and print a Deleted Filing Results transaction report

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

2.   Click the **Deleted Filing Results** link. The Deleted Filing Results 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 Filing Results 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.

Audit Entity Actions Report

Audit Entity Actions Report is one of transaction reports provided by Monarch Server. This report provides the following information:

❑   Date and time when changes were made

❑   Name of the user(s) who made changes

❑   Category of the performed action (Create, Edit, Delete)

❑   Type of the changed entity

To view and print an Audit Entity Actions transaction report

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

2.   Click the **Audit Entity Actions** link. The Audit Entity Actions Report page is displayed.

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

> **NOTES**
>
> If you do not provide a date or time period, all search 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 search actions for all users, select **All Users**.)

5.   From the **Event Category**, select the appropriate action. (To view all actions, select **All event categories**.)

6.   From the **Entity Type**, select the type of the entity, changes to which you want to view. (To view all entities, select **All types**.)

7.   Click **View**. The Audit Entity Actions transaction report is displayed.

8.   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 Users Entitlement Report

Dynamic Users Entitlement is one of transaction reports provided by Monarch Server. This report provides the following information:

❑   Dynamic User ID.

❑   Dynamic User name.

❑   Dynamic User entitlement.

❑ Date and time when a dynamic user logged on.

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

2. Click the **Dynamic Users Entitlement** link. The Dynamic Users Entitlement 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. In the **User** field, select the user from the list.

5. Click **View**. The Dynamic Users Entitlement 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.

ANNOTATION REPORTS

Annotation reports provide information about all annotations to reports.

This report provides the following information:

❑ Time when annotations were created

❑ Annotation level (report, page or selection)

❑ Name(s) of user(s) who created annotations

❑ Text of annotations created by a user(s)

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

2. In the **Annotations: From ... To** fields specify a time period, for which you want to view annotations. Click 🗓 to open the Calendar window, and select the date.

> **NOTES**
>
> If you do not provide a date or date range, all annotations for the specified

user(s) will be included in the report.

3. In the **Document date: From ... To** fields specify a time period for the document dates to be included in the report. Click 📅 to open the Calendar window, and select the date.

4. From the **User** list, select a user whose annotations you want to view (to view annotations of all users, select the **All Users** option).

5. From the **Document Groups** list select a document group, to which the desired document type(s) is assigned.

6. From the **Document Types** pane drag an appropriate item(s) to the **Assigned Document Types** pane.

7. If you want to view annotations for one report only, click the **Show Documents** button under the panes. The **Reports** list will display all reports of the selected document types. You can select one report to be included in the report.

8. Click **View**. The Annotation Report is displayed.

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

Annotations

An annotation is a portion of a document to which a text message has been attached. When a document that contains an annotation is viewed on the Report View page within MSClient, the annotated portion of the document is highlighted in yellow.

When MSClient users add an annotation to a document, they specify the role members, group members and users, to whom they want the annotation to be visible. Any user who subsequently views that document, and to whom the annotation has been assigned, will be able to view the text message.

REMOVED REPORTS

Monarch Server provides possibility to view the following information about reports that were removed from **Read-
Only** volumes:

❑   Availability of a **First Copy** and a **Second Copy** at the moment of deletion

❑   File name

❑   Filing date

❑   Document date

❑   File size

❑   Report name

To view removed reports

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

2.   In the **Document date: From ... To** fields specify a time period for the document dates to be included in the
report. Click [icon] to open the Calendar window, and select the date.

3.   From the **Volumes** list, select a read-only volume, from which reports were removed.

4.   From the **Document Types** pane, select a document type that contained removed reports.

5.   Click **View**.

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

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

ACTIVITY MONITOR

Monarch Server provides the possibility to monitor current filing and maintenance activities, performed in the system.

To access the activity monitor, on the **Navigation Tree**, click **System Reports**, and select **Activity Monitor**.

To display the list of activities occurring in the system

1. From the Job Type list, select Filing Process, Auto start Filing Process, or Maintenance Process.
2. From the **Time Period** list, select one of the following options:
   - **Now** (to show processes occurring at the current moment)
   - **Last Hour** (to show processes that occurred during the last hour)
   - **Last 24 Hours** (to show processes that occurred during the last 24 hours)
   - **Nearest** (to show processes that will occur in the near future)

The list displays the following information:

- ❑ **Name of a process**
- ❑ **Start time**
- ❑ **End time**
- ❑ **Information** (click a plus sign to display additional information about a process)
- ❑ **Status** (Not Started, In Progress or Completed)

> **NOTES**
>
> The list auto-refreshes every 60 seconds. You can refresh it manually by clicking **Refresh**.

ACTIVE USERS

Monarch Server 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."

A notification of your license restriction also appears on top of the main page of the Monarch Server Administrator.
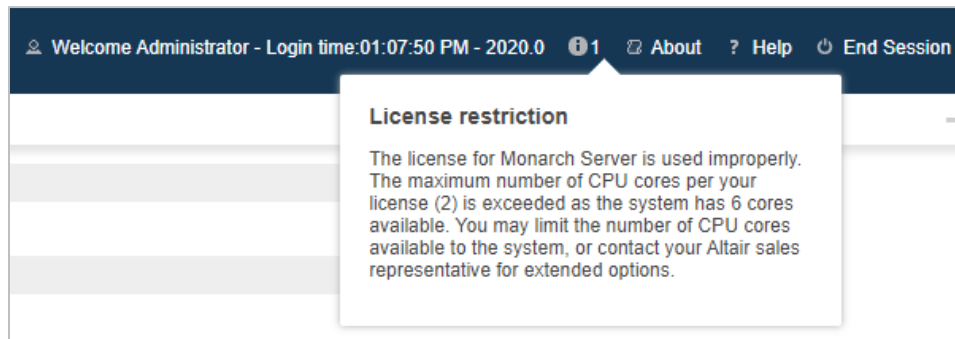
How to Receive Help

❑ 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.

GLOSSARY

Administrator: Any individual performing system administration, database administration, network administration, or warehouse administration duties.

Analytical Data: Data that has been evaluated, summarized or in some way analyzed.

Connection: A set of parameters necessary to connect to a data warehouse.

Copy: In Monarch Server Web, a storage location that will receive data files when documents are added to a storage group. A first copy (Copy 1) must reside on a mass storage device. Subsequent copies (Copies 2 and greater) may reside on any form of media.

Default Keyword: As opposed to a standard keyword, which is a value taken from a report, a default keyword is a single keyword that is automatically associated with every document created during a specific archive process or process job. It is used to mark or identify documents with a value that is not contained within the documents themselves. Use of default keywords is optional.

Document: A section of a report that is logically independent from other sections. Documents are the units that a report is divided into when it is stored in the report warehouse.

Document Break Field: An index field that is used to mark the beginning of a new document within a report. For example, a change in Purchase Order Number would be used to detect the start of a new document. The system administrator identifies the document break fields for a report for use during the archiving process.

Document Search: A database search for all documents that match the specified document type, document date range, and keywords. There criteria are specified in MSAdmin, while the document search itself is performed in Server.

Document Group: A document group is a classification of document types according to some common characteristic or subject. You could, for example, decide to group different kinds of financial reports into a single document group. Each document group contains one or more document types.

Document Template: A pre-designed document that contains formatting and, in many cases, generic text.

Document Type: A generic class of documents that have the same physical layout and function. Document types are assigned names and are classified into document groups by the system administrator.

Execution Frequency: Execution frequency (or run time) specifies both how often a process will run (e.g. once, hourly, daily, etc.) and at what time it will run. When scheduling a filing or maintenance process, you specify the execution frequency on the Filing Process page or the Maintenance Process page.

Filing: The process of indexing, paginating, and archiving incoming reports.

Filing Process: A process that executes all the filing tasks assigned to it.

Filing Task: A task that launches operations of indexing, paginating, and archiving incoming reports.

Global Security Keyword: A keyword associated with a role, user group or user that is logically added (the **AND** operation) to any retrieval requests. The purpose of a security keyword is to restrict user access to only those documents that contain this specific keyword.

Index Field: This is an internal pointer that associates a specific keyword with a specific document. It points to the start of a document, with which the given keyword is to be associated. Monarch Server uses indexes to locate and retrieve documents according to keywords. For example, when you type in the keyword **001-01-0001** for **Social Security Number**, the index is used to locate documents for the individual with that social security number.

Keyword: A specific value of a keyword type. **John Q. Public** is a keyword for the **Employee Name** keyword type.

Keyword type: A keyword type is the term, which is defined when you create a Monarch model (when creating a Monarch model, one or several keyword types are defined). This is a field within a model that identifies the document. For example, a keyword type for purchase orders might be **Purchase Order Number**. A keyword type for an employee report would be **Social Security Number**. A document type may have several keyword types associated with it. These keyword types are set up by a system administrator and are made available to users automatically.

Keyword value: This is the specific value of a keyword type. For example, **Q197-4112** could be a keyword for the **Purchase Order** keyword type.

Log Clearance Task: The process of clearing log-records from the Monarch Server database.

Locale: Defines one of the regional options. A locale affects the way some programs display and sort dates, times, currency and numbers.

Maintenance process: A process that executes all maintenance tasks assigned to it.

Maintenance Task: The process of copying, moving, and deleting files to maintain document storage.

Monarch Index Model File: A special form of Monarch Model File that contains only those fields that are used as keyword types for a given document type. A system administrator creates and controls this model file. It is used only during the archive process.

Monarch Model File: A file with the .dmod or .xmod extension, which contains field, filter, summary and chart definitions as well as other settings used by Monarch. A Monarch Model file is associated with each document type and is automatically opened when documents are viewed. A system administrator creates the default model file. End users can also create their own Monarch Model Files with their personal analysis settings and preferences.

Offline task: Offline processing provides the ability to process large datasets in the offline mode on a scheduled basis. If a user requests some operation (view report, table, summary, and so on) for a dataset, whose size exceeds the system limit, Monarch offers to process such requests in the offline mode. Schedule information for this task includes the start and stop time, which allows executing the task at the specified time only.

Online Mass Storage Device: Any storage device that provides immediate access to data.

Privileges: Permission to perform certain tasks within Monarch Server.

Process: An ordered sequence of tasks, scheduled by an administrator to perform once or periodically. It guarantees that tasks are performed sequentially, in proper order.

Removable Storage Device: Any storage device that requires human intervention to mount and unmount media when reading and writing data. A request for mounting a given storage group (or volume) must be issued before data can be retrieved or stored.

Report: A formal record containing information in a printed or electronic format. Reports have a consistent, structured layout and are generally stored in a single file on a storage volume.

Report Mining: The process of accessing and analyzing report data, usually across numerous reports contained in a report warehouse.

Report Premining: Pre-extracting table data from reports during a filing process (as part of archiving report data), and putting it into the MS database. The data will be used to build data views. No access to original report data is needed.

Report Warehouse: A repository containing reports that have been indexed for retrieval.

Rights: Permission to access any of the Monarch Server components, basic functions, as well as documents and custom queries.

Role: A role defines rights for users and user groups. It cannot include other roles. A role is kept in the Monarch Server 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 individual users.

Search group: A set of logically related searches.

Search: Document retrieval criteria saved in the database under a particular name.

Security Keyword: A keyword associated with a role, user group or user that is logically added (the **AND** operation) to any retrieval requests. The purpose of the security keyword is to restrict user access to only those documents that contain this specific keyword.

Source: A set of parameters determining what data should be retrieved from a data warehouse.

Storage Group: The logical storage bins (referred to as storage groups) in which reports put into the Monarch Server system are stored. All the data in a storage group is stored together. Each storage group may be composed of several storage volumes.

Storage Volume: Volumes are used to segment the continually growing amount of data in a storage group. Each volume can have one or more copies, which may reside in separate storage locations. Several storage volumes comprise a storage group, each volume having a specific, user-defined size.

Task: Appropriate processing of a group of files from one incoming directory, described by task properties. Tasks have a name, description, and can be reused and assigned to multiple processes.

Text Search: A search through the text of documents for a given string of text. Documents must also meet the specified selections for document type, document date range, and index fields.

User: A user is an individual who has been granted product rights and privileges to Monarch Server by a system administrator.

User Group: A classification of users created to manage individual user's rights to the system.

User Name: A name or word defined by an administrator that lets Monarch Server recognize and identify authorized users. A user must supply a user name to log on to Monarch Server. Unique user names can be created for either each user, or for each type of user (for example, data entry clerk).

CONTACT US

GET IN TOUCH

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

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