

 **RELEASE NOTES**

Monarch Server 2021.1.1

Report Warehouse (Formally Content Server), Automator, Report Mining Server

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1. Welcome

Welcome to Altair Monarch Server release 2021.1.1.

This release is generally available from May 23, 2022, following on from the previous 2021.0 released in Jan 2022.

This document provides an overview of the new features and enhancements provided by Monarch Server in the 2021.1.1 release. For information on installation and upgrade procedures, as well as details on supported platforms and software requirements, see the separate installation guides that are provided with this release.

NOTES:

- Due to various technology updates in this release, it is not possible to 'patch' from a previous 2021.x release. Instead, you must uninstall the currently deployed version and reinstall the 2021.1.1 wholly. The Monarch Server database can then be upgraded and relevant settings applied to relevant web.config / config.xml files relevant to the instance. Please ensure these are backed up prior to the uninstall for reference or for regression.
- It is strongly recommended that at minimum, Altair Support / Professional Services is involved with reviewing any upgrade activity prior to the same being carried out. A full backup of the existing deployment must be made and verified before commencing the same to enable regression should it be required. Without a backup, data loss is unavoidable. Altair recommends utilizing our Professional Services to assist you with planning or completing an upgrade activity to minimize downtime, disruption, and risk.

Altair highly recommends upgrading to the latest available release in order to make use of the latest functionality and feature enhancements, improvements in performance and stability, and to be best prepared for the next release.

Monarch Server 2021.1.1 is compatible with Monarch Complete/DPS 2021.1.1 and earlier.

- The full version of Datawatch.SDK, which is used in the build, is 17.1.1.31052.
- The full version of Datawatch.DataPrep.Engine, which is used in the build, is 17.1.1.31052.

2. Software Support

Altair will support the current major version of a product release, and one major version behind the latest product version (N -1).

This means supported versions at the time of this Altair Monarch Server release will be 2021.x and 2020.x.

Support includes:

- Response to questions about using product features
- Operational questions
- Guidance on installing new updates, service updates, and patch fixes (Altair strongly suggests that Altair Knowledge Works Professional Services be involved with your upgrades and patches)
- Investigation into operational failures and/or issues

3. Access to Software Updates

Customers with an active Maintenance Plan are automatically provided access to the latest product releases via the Customer Support Portal (<https://community.altair.com/community>). This includes major software releases and service releases for updates and fixes.

3.1. Release Overview

Altair Monarch Server is a deployment platform for the Monarch based server products within the Knowledge Works product set.

The server-based platform is scalable from a single-server implementation to a multi-server web distributed system, providing failover, scaling and pooling capabilities accordingly.

Altair Monarch Server consists of 3 products:

- Report Warehouse
 - Traditional Enterprise Server / Content Server functionality
 - Filing, storage, retrieval of TXT & PDF based reports
- Automator
 - Traditional Data Pump Engine
 - Project Editor
 - Visual Process Editor
- Report Mining Server (RMS)
 - 'Overlaying' Report Warehouse (Formally Content Server) functionality on top of an existing Content Management System

Altair Monarch Server 2021.1.1 continues the following:

- To simplify providing a centralized, browser-based report warehouse with rich data extraction/manipulation/export capabilities
- To enable the automation of data preparation based on Altair Monarch Workspaces and Models
- To enhance the user experience of existing Content Management Systems by enabling richer interactions with compatible report content, enabling rich data extraction/manipulation/export capabilities

Enhancements in the general user experience are added to process definitions/logic, and improvements are made for data connectivity and exports.

Additionally, a few general enhancements are included in this release relating to upgrades, performance & security.

Finally, a Veracode SCA Scan for vulnerability issues was run to ensure that no significant risks for security breaches were apparent and appropriate remedial work undertaken to address issues accordingly.

4. Release Benefits

This document is divided into the major areas where improvements and additions of new features provide significant benefits to the users of Altair Monarch Server 2021.1.1.

A summary of changes / new features is as follows:

- Installation & Upgrade
- Deprecated functionality
- Altair Monarch Complete SDK / Engine alignment
- Reduced risk for security breaches
- New features / Improvements

4.1. Installation and Upgrade

Deprecation of older and support of newer technologies are reflected in this release of Altair Monarch Server 2021.1.1:

- Deprecation of Internet Explorer support for all browser-based interfaces (MSClient, MSAdmin, RMSCClient) (DST-2826)
- Update of various third-party components (e.g. JQuery) for improved security/support/maintenance & compliance (DST-2588)
- Rebranding of Content Server to Report Warehouse (with no functional changes)

Any queries in this regard can be directed to Altair Knowledge Works Support (<https://community.altair.com/community>).

4.2. Deprecated Functionality

The Themes functionality previously available in Monarch Server has been removed. The product will deploy / upgrade to reflect a default Altair branding/styling per the previously available 'MonarchServer' theme. Customers that had customized themes and wish to continue with the same are directed to Altair Knowledge Works Support (<https://community.altair.com/community>) to discuss options.

4.3. Altair Monarch Complete SDK/Engine alignment

Altair Monarch Complete 2021.1.1 was released in May 2022.

To align with the desktop tools, Altair Monarch Server 2021.1.1 makes use of the Altair Monarch Complete 2021.1.1 engines accordingly (also referred to as the Monarch Classic and Data Prep Studio SDKs, DST-2718).

It is important to ensure desktop and server components are of a common version to avoid issues with models/projects/workspaces generated in the desktop product and subsequently used in server product(s). The version of the Engine/SDK is provided as part of the Altair Monarch Server major/minor releases and patch release notes. These should be checked to ensure commonality between the products accordingly. Altair Knowledge Works Support can provide further assistance if required (<https://community.altair.com/community>).

4.4. Reduced Risk for Security Breaches

Regular review of the software eliminates the risk to have vulnerabilities exposed. The code scans performed on Altair Monarch Server permit deployments to more easily comply with the major regulatory requirements and industry standards.

A vulnerability code scan was performed on Altair Monarch Server 2021.1.1 using Veracode Software Composition Analysis (SCA), which is considered one of the most effective ways to eliminate software flaws. Relevant issues in Altair Monarch Server 2021.1.1 that were found and classified as high or medium are fixed (DST-2658).

Third party components are being updated/replaced to facilitate compliance and ongoing maintenance of the codebase.

5. New Features / Changes

An overview of major new features / improvements follows.

5.1. Deprecation of Themes Management

Prior to 2021.1.1, Monarch Server offered the ability to specify a style to each of the Monarch Server feature UI's (MSAdmin, MSCClient & RMSClient). These could be from the list of pre-defined styles, or a customer could create a new or edit existing to match their requirements.

This functionality has been removed with upgrades and new installs deploying with a standard style known as 'MonarchServer' aligning with Altair Corporate Branding requirements.

Customers wishing to retain customizations should refer to Altair Support / their Account Manager to discuss options.

5.2. Rebrand of Content Server to Report Warehouse

Content Server has been rebranded to Report Warehouse throughout the UI and documentation. This is to better signify its input types of TXT or PDF based reports as opposed to a potential assumption of other digital / binary formats

Example of branding changes;

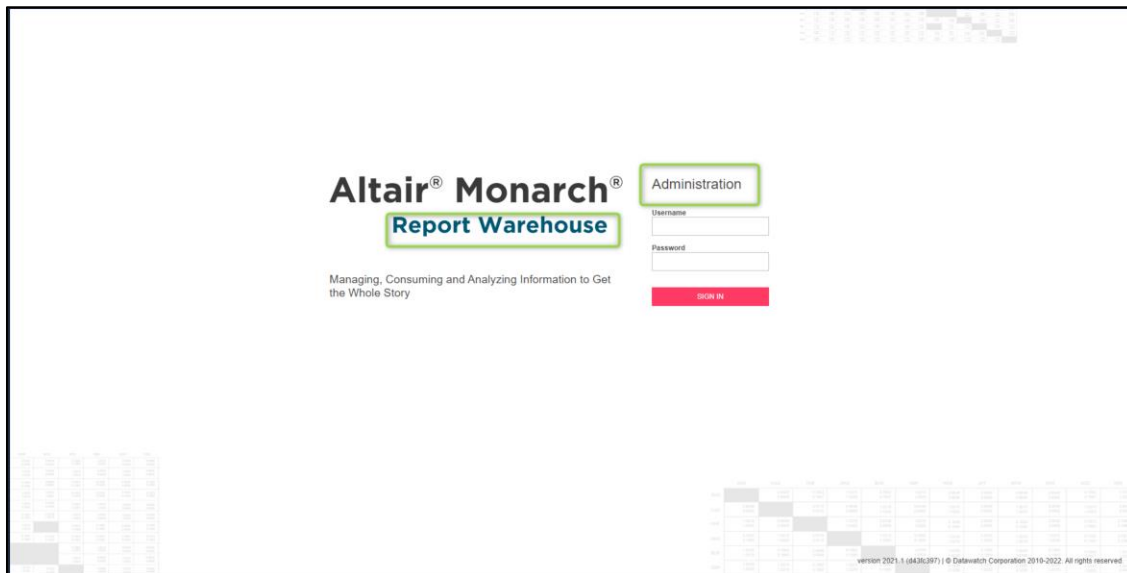


Figure 1 - Report Warehouse Admin Page

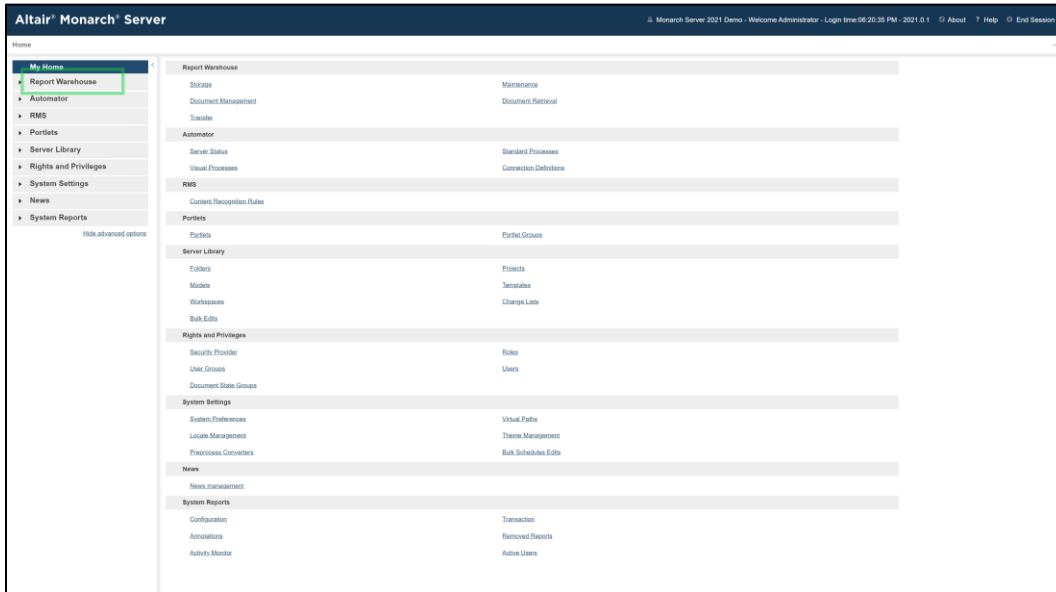


Figure 2 - Monarch Server Admin Tree with Report Warehouse Menu Option

5.3. Improved List Filtering

To assist with list navigation and Administration, filtering options have been added to allow users to find/focus on objects relevant to their current activity. This has been applied to Standard & Visual Processes, Server Library Objects, Users, Schedules and Report Warehouse lists. Example in the UI are as follows.

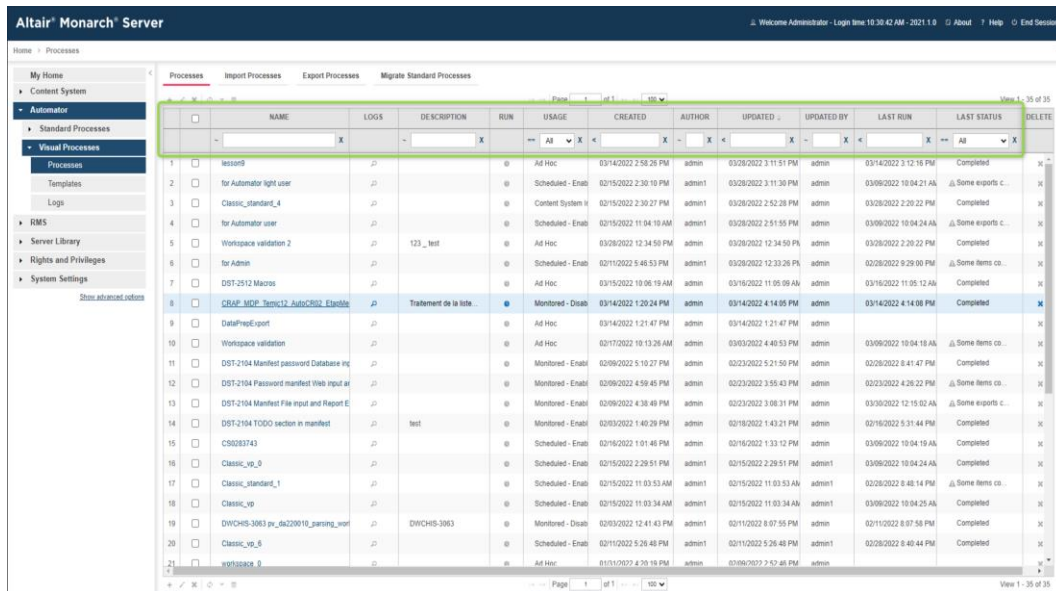


Figure 3 - Visual Process List with new Filtering Options

LOG ID	PROCESS NAME	STARTED	COMPLETED	DURATION	STATE
484	DST-2104 Manifest File input and Report Export	03/28/2022 12:19:09 AM	03/28/2022 12:19:09 AM	00:00:06	Some errors completed with errors
483	DST-2104 Manifest File input and Report Export	03/28/2022 12:15:06 AM	03/28/2022 12:15:12 AM	00:00:06	Some errors completed with errors
482	Workspace validation 2	03/28/2022 2:20:22 PM	03/28/2022 2:20:28 PM	00:00:05	Completed
481	Classic_standard_4	03/28/2022 2:20:22 PM	03/28/2022 2:20:28 PM	00:00:05	Completed
480	Classic_standard_4	03/28/2022 2:19:59 PM	03/28/2022 2:20:05 PM	00:00:05	Completed
459	Classic_standard_4	03/28/2022 2:19:49 PM	03/28/2022 2:19:54 PM	00:00:05	Completed
458	Workspace validation 2	03/28/2022 2:19:22 PM	03/28/2022 2:19:31 PM	00:00:08	Completed
457	DST-2104 Manifest File input and Report Export	03/28/2022 1:00:00 AM	03/28/2022 1:00:06 AM	00:00:05	Some errors completed with errors
456	DST-2104 Manifest File input and Report Export	03/28/2022 12:15:05 AM	03/28/2022 12:15:11 AM	00:00:05	Some errors completed with errors
455	DST-2136 Switch of validation of workspaces	03/28/2022 12:00:53 AM	03/28/2022 12:00:32 AM	00:00:28	Some items completed with errors
454	DST-2104 Manifest File input and Report Export	03/27/2022 12:15:06 AM	03/27/2022 12:15:11 AM	00:00:05	Some errors completed with errors
453	DST-2104 Manifest File input and Report Export	03/28/2022 12:15:07 AM	03/28/2022 12:15:14 AM	00:00:06	Some errors completed with errors
452	DST-2104 Manifest File input and Report Export	03/28/2022 10:31:41 AM	03/25/2022 10:31:48 AM	00:00:07	Some errors completed with errors
451	DST-2104 Manifest File input and Report Export	03/24/2022 12:15:32 AM	03/24/2022 12:15:32 AM	00:00:06	Some errors completed with errors
450	DST-2104 Manifest File input and Report Export	03/23/2022 12:15:06 AM	03/23/2022 12:15:12 AM	00:00:05	Some errors completed with errors
449	DST-2104 Manifest File input and Report Export	03/22/2022 12:15:03 AM	03/22/2022 12:15:10 AM	00:00:06	Some errors completed with errors
448	DST-2104 Manifest File input and Report Export	03/21/2022 1:00:07 AM	03/21/2022 1:00:12 AM	00:00:05	Some errors completed with errors
447	DST-2104 Manifest File input and Report Export	03/21/2022 12:15:01 AM	03/21/2022 12:15:07 AM	00:00:05	Some errors completed with errors
446	DST-2136 Switch of validation of workspaces	03/21/2022 12:00:45 AM	03/21/2022 12:00:45 AM	00:00:34	Some items completed with errors
445	DST-2104 Manifest File input and Report Export	03/20/2022 12:15:05 AM	03/20/2022 12:15:11 AM	00:00:05	Some errors completed with errors
444	DST-2104 Manifest File input and Report Export	03/18/2022 12:15:03 AM	03/18/2022 12:15:10 AM	00:00:06	Some errors completed with errors

Figure 4 - Visual Process Log List with new Filtering Options

5.4. Bulk Edit Improvements

A few improvements have been made in bulk edits.

- When a search is carried out using a wildcard (e.g. *) and then a replacement action is attempted, the UI will prompt warning the user that the action will apply to all objects found by the initial wildcard and asking for validation before carrying out the same;

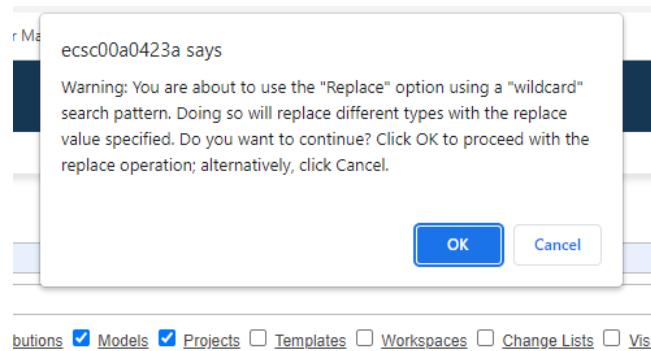


Figure 5 - New wildcard update warning

- Bulk Edit can now allow for changes to be made to Visual Processes Distribution settings;

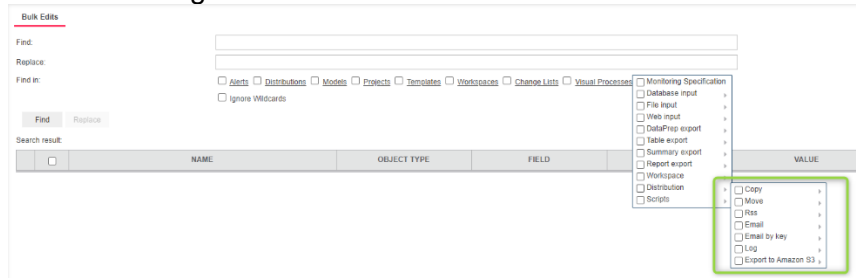


Figure 6 - Visual Process Distribution Bulk Edit options

- Bulk edit now allows for the editing of 'Export behavior for accdb/dbf/mdb' settings.

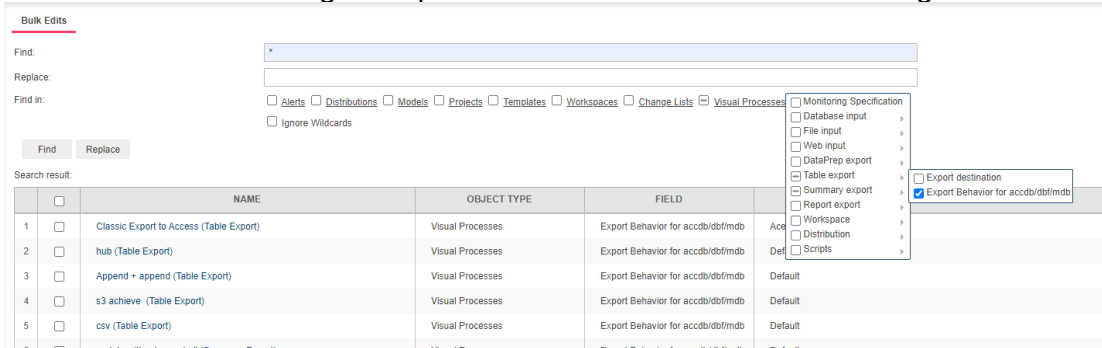


Figure 7 - Visual Process 'Export behaviour for accdb/dbf/mdb' setting

5.5. API Improvement – Method to download original report from Report Warehouse

Prior to this release, Monarch Server Content API provides raw report export ability, however, there wasn't any method for downloading the original report for a specific document. This new feature enables this capability. As an example, when the original report is a PDF file, the export will be the text only version of the original PDF. However, this new method will allow both the original and ingested version to be retrieved. Refer to the Programmers Guides for further information.

5.6. New Status Page Features

Status Page has been improved to provide details of processes in different states, elaborating further on the counts only view from previous releases.

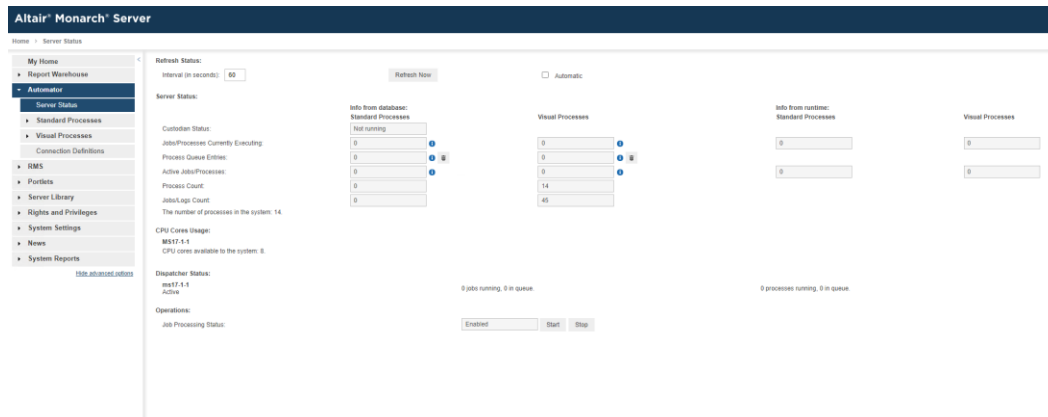


Figure 8 - New Status Page with Info buttons providing details of processes behind the values

Hovering over the blue icon to the right of each of the values will provide a popup window listing those processes corresponding to the state value.

5.7. New Macro Options

Macros have been improved to provide Previous Day (&[dd.-1d]), Previous Month (&[mm.-1m]) & Previous Year (&[yyyy.-1y]) functionalities. These can be selected in the existing Macros picklist as per following screenshot.

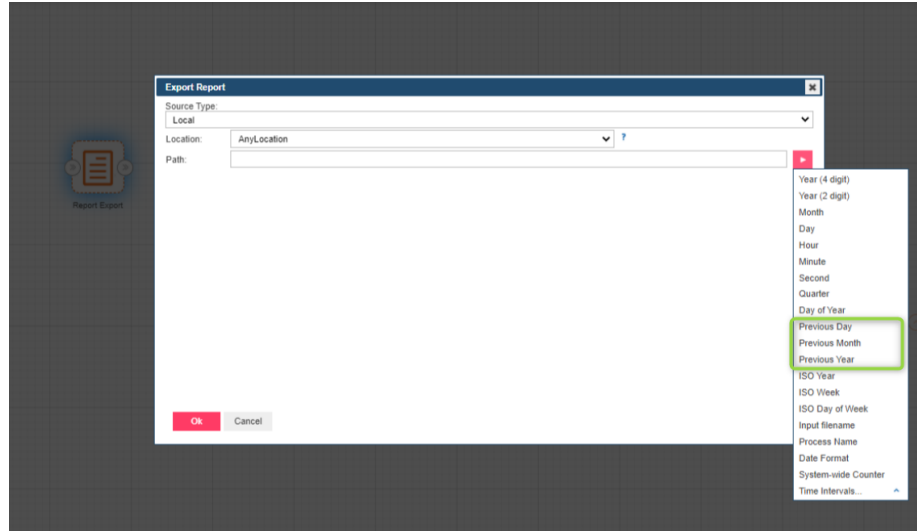


Figure 9 - Macro picklist showing new 'previous' day, month, year options

5.8. New Process Validation Option

When opening a process, it is possible to manually cancel process validation or, the validation will cancel after a period of time in seconds, defined in the System Settings. By default, the settings is 120 seconds. When a process is opened, the display will allow the user to either wait or manually cancel verification as follows.

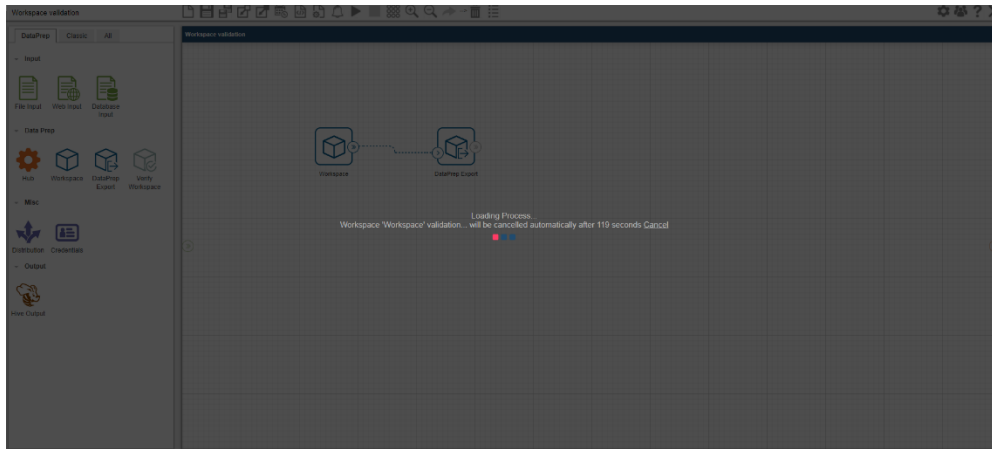


Figure 10 - Example of opening a process showing the option to Cancel verification manually or wait as per timeout defined

The timeout period can be defined in System Settings\System Preferences\General Settings.

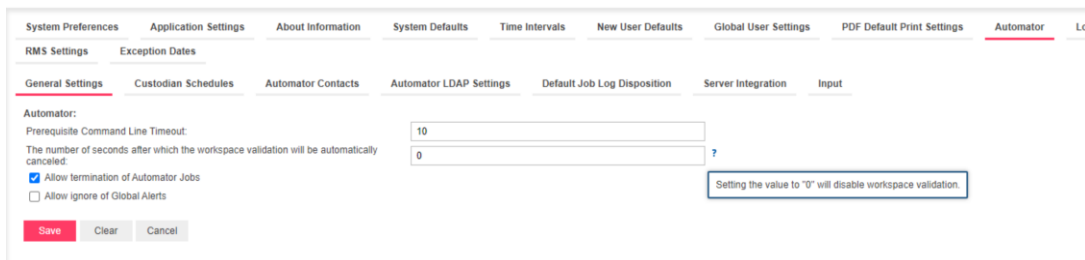


Figure 11 - System Setting Screen for Verification timeout

5.9. Module Stop / Starting via CLI

A new utility has been added to the Configurator folder, enabling the ability to restart modules without restarting the actual Services.

This can be used to help with instance management automation either locally or remotely. The new executable (and its default location) is;

C:\Program Files\Datawatch\Datawatch Server\Configurator\Datawatch.ModulesManagement.Configurator.Terminal.exe

The following commands are available;

Command	Description
--help	Displays the help screen
--?	Displays the help screen
--restartAllModules	This command restarts all modules in specified server. It requires Server name as parameter.
--restartAllModulesInAllServers	This command restarts all modules in all servers
--restartModulesInServers	This command restarts module(s) in server(s). It requires moduleName and serverName as parameters.
--serverName	Parameter to set Server name for restarting modules in that server. Multiple server names can be provided separated by colon. e.g., --serverName=ServerA.domain:ServerB.domain –
--moduleName	Parameter to set Module names to restart. Multiple module names can be provided separated by colon e.g. --moduleName=Datawatch.RemoteServices.ClientServicesHost:Datawatch.RemoteServices.DataPumpServicesHost

This can be used in combination with other tools to facilitate the controlled restart of both modules and instances either as manual or automated / scheduled actions.

5.10. Connection Definitions - Secured

Previously, connection definitions were globally accessible.

From 2021.1.1, these are now classed as securable objects, allowing them to be limited to Users, Groups or Roles defined in the Monarch Server Instance.



Figure 12 - Securing Connection Definitions

6. Full List of Fixes / Improvements

6.1. General Fixes / Improvements

Category	General Ref	Summary
Improvement	DST-2588	Update 3 rd Party Components (e.g. JQuery)
Improvement	DST-2718	Update SDK and Engine to 17.1.1
Improvement	DST-2737	Improve the alert displayed when replacing several values in the Bulk Edit search results found with the help of wildcard (*)
Improvement	DST-2742	Doc: Describe the updated alert for bulk edits operations
Improvement	DST-2774	Doc: Add note about deprecation of the theme management functionality since 2021.1.1 product version
Improvement	DST-2783	Doc: Describe new filters for the lists
Improvement	DST-1952	Additional options to filter lists in UI (e.g., Processes, Schedules, Users, etc.)
Improvement	DST-2826	MS: Deprecate IE11 support (Primarily affecting Report Warehouse Client)

6.2. Automator Fixes / Improvements

Category	Automator Ref	Summary
Improvement	DST-2021	Make the Replace option for Path initially unchecked when uploading Model or Workspace
Improvement	DST-2025	Ability to see names of running processes from Server Status page
Improvement	DST-2136	Switch off, improve or provide a feature to cancel the validation process for large nested workspaces
Improvement	DST-2197	Add an option to disable all schedule processes in Visual Process
Improvement	DST-2253	Exception Date page: UI improvements

Category	Automator Ref	Summary
Improvement	DST-2262	Bulk Edit: should be possible to find and replace values for Distribution item (Log, Email, RSS, Email By Key options) for Visual and Standard processes
Improvement	DST-2343	Provide security for the connection definition object.
Improvement	DST-2512	Add new macros for previous day, month, and year
Improvement	DST-2532	Add a Hint/Note for Report Export item to specify available extensions (.txt, .prf, .pdf)
Improvement	DST-2533	Add a setting to send a notification to system admin when monitoring was disabled by an error
Improvement	DST-2719	Improve title for "Disable monitoring" checkbox
Improvement	DST-2724	Add ability to restart services via CMD/CLI
Improvement	DST-2734	Doc: Describe automatically checked "Replace" checkbox in case of the uploading new path in Workspace
Improvement	DST-2735	Doc: Describe ability to replace ACE DAO/ACE OleDb/Default values for "Export behaviour for accdb/dbf/mdb" in Bulk Edit for several Visual processes in Bulk Edit
Improvement	DST-2736	Doc: Describe the ability to replace RSS, Email, Email by Key, Log, Export to Amazon S3 value of Distribution item in VP through Bulk Edit
Improvement	DST-2738	Doc: Describe UI changes on Exception Date page
Improvement	DST-2739	Doc: Update "Disable monitoring" checkbox title in the documentation
Improvement	DST-2741	Doc: Describe ability to manage security rights for Connection Definition
Improvement	DST-2744	Doc: Describe the ability to disable/enable schedules from the list of the processes page
Improvement	DST-2746	Doc: Describe the ability to manage the validation process of the workspace

Category	Automator Ref	Summary
Improvement	DST-2749	Doc: Describe commented lines with "TODO:Specify Password" in the generated manifests
Improvement	DST-2763	Doc: Describe ability to see names of currently execution, active processes and processes in queue entries
Improvement	DST-2771	Doc: Improve Visual Processes section of Admin Guides
Improvement	DST-2772	Doc: Update the list of the available macros
Improvement	DST-2788	Doc: Describe ability to restart hosts/modules with CLI/CMD in the installation guides.

6.3. Report Warehouse (Formally Content Server) Fixes / Improvements

Category	Report Warehouse Ref	Summary
Improvement	DST-2330	Provide a method in the Monarch Server Report Warehouse API for downloading the original report for a document type.
Improvement	DST-2740	Rename/rebrand Monarch Server Content to Monarch Server Report Warehouse
Improvement	DST-2768	Doc: Describe a new API method for Report Warehouse

6.4. Report Mining Server (RMS) Fixes / Improvements

No RMS-specific items in this release.

7. Known Issues

The following known issues are intended to be fixed in a subsequent patch on Altair Monarch Server 2021.1.1.

7.1. RMS

- [DWCHIS-3040] – RMSClient for ICN does not work with ICN 3.0.10+
- [DST-2751] - No error message is displayed when error occurs during uploading report/model/template in RMSClient

7.2. Automator

- [DST-2830] - The AssemblyFilePath fields size in VisualProcessScriptReferences table is not long enough to hold the entire reference path.
- [DST-2748] - When unable to delete SQL Server table, "Overwrite" option silently "Appends".
- [DST-2713] - It's impossible to retrieve list of existing tables when exporting to .xls format
- [DST-2681] - Dropping file to upload and Browse Server options in Server Library > Workspace > Replace Path dialog are not working in Automator v16.1.1
- [DST-2680] - looping issue with Visual Process object
- [DST-2633] - Visual Process manifest fails if the workspace's DOR number in the manifest file does not match the workspace's object DOR number in the visual process.
- [DST-2534] - Monitoring on visual and standard processes can become disabled with no error, with duplicate input file
- [DST-2417] - Cannot save new Custodian Schedule if name is longer than 27 characters
- [DST-2390] - When the Verify workspace object is set to 'Stop without error' and the input monitoring is enabled, if verify fails, the process cannot disable trigger, therefore the process continues to run
- [DST-2296] - In certain process configuration some data prep exports in sequence produce no action and no error. It just starts and finishes
- [DST-2279] - A Visual Process with one PDF input and one Excel or one .csv file fails when the workspace's load plan is configured to use the associated file in the database input.

Monarch Server 2022.0 is targeted to be available in Calendar Q4 2022.

EOF