



Altair[®] Monarch Server[™] v2023.1 AUTOMATOR – SINGLE SERVER INSTALLATION GUIDE

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MONARCH SERVER SYSTEM – INSTALLATION PROCEDURE

This document describes the installation procedure of the following Monarch Server System product:

Monarch Server Automation Edition

Before installing, make sure that the corresponding product is included with the license you obtained.

SOFTWARE REQUIREMENTS

Server software:

P

- INET framework 4.8
- SQL Server 2016/2017/2019 (if the Automator database is present on the local machine)

OTE	SQL Server Express is only suitable for RMS or Automator functionality. It is not
	viable for use with an instance servicing Report Warehouse functionality.

□ SQL Server Express versions can be downloaded from the following links:

SQL Server 2019 Express Edition (English):

- Basic (239 MB): <u>https://download.microsoft.com/download/7/c/1/7c14e92e-bdcb-4f89-b7cf-93543e7112d1/SQLEXPR_x64_ENU.exe</u>.
- Advanced (700 MB): <u>https://download.microsoft.com/download/7/c/1/7c14e92e-bdcb-4f89-b7cf-93543e7112d1/SQLEXPRADV_x64_ENU.exe</u>.

SQL Server 2017 Express Edition (English):

- Core (275 MB): <u>https://download.microsoft.com/download/E/F/2/EF23C21D-7860-4F05-88CE-39AA114B014B/SQLEXPR_x64_ENU.exe</u>.
- Advanced (710 MB): https://download.microsoft.com/download/E/F/2/EF23C21D-7860-4F05-88CE-39AA114B014B/SQLEXPRADV_x64_ENU.exe.

SQL Server 2016 with SP2 Express Edition (English):

- Core (437 MB): https://download.microsoft.com/download/4/1/A/41AD6EDE-9794-44E3-B3D5-A1AF62CD7A6F/sql16 sp2 dlc/en-us/SQLEXPR x64 ENU.exe.
- Advanced (1445 MB): <u>https://download.microsoft.com/download/4/1/A/41AD6EDE-9794-44E3-B3D5-A1AF62CD7A6F/sql16_sp2_dlc/en-us/SQLEXPRADV_x64_ENU.exe</u>.

Operating systems:

□ Windows Server 2016 (IIS 10.0)

- □ Windows Server 2019 (IIS 10.0)
- □ Windows Server 2022 (IIS 10.0)

NOTE Core versions of the above operating systems are NOT supported.

Additional system software components:

The following components are installed automatically by the installation program if not present on the machine. You may consider installing them at the most convenient time (for example, a scheduled maintenance window) as the installation may require system reboots.

- .NET framework 4.8
- Microsoft Access 2013 Runtime
- Microsoft SQL Command Line Utilities 15 for SQL Server (if the Automator database is not present on the local machine)
- Microsoft ODBC Driver 17 for SQL Server (if the Automator database is not present on the local machine)
- SQL 2017 Local DB

Client software:

- One of the following browsers:
 - Mozilla Firefox
 - Google Chrome
 - Microsoft Edge (Chromium)
 - **NOTE** Each release of Monarch Server is tested with the latest publicly available browser versions available at that time. Due to the frequency of browser version updates, Altair does not include specific browser version numbers in the system requirements. In case of changes in browser functionality affecting UI functionality, Altair will address the same as part of a subsequent patch release.

HARDWARE REQUIREMENTS

Processors:

Recommended: Multi-core or multi-processor Intel Xeon 2 GHz w/ 2 MB cache (or better)

Memory:

Recommended: 16 GB RAM or greater

Network Adapter:

Recommended: Ethernet 100 Mbps or higher (Gigabit recommended)

Hard drive:

Recommended: 100 GB or more (depending on processing requirements, report sizes, number of active concurrent users, mining types). Disk performance has a significant influence on application scalability and viewing response.

NOTE	Additional disk space may be required if leveraging Monarch Classic-based processes. The requirement depends on the number of concurrent processes and the data volumes being processed by each and the subsequent configuration of the SDK Database. Altair Support can assist with identifying the space considerations in such instances.

Monarch Server is a distributed application. Typically, better functionality is obtained by deploying 1+ servers as opposed to increasing the resource of a single server. A single server environment has no provision for failover, has high availability, and has limits with regard to performance optimization.

Monitor

□ **Recommended:** Screen resolution of 1920 × 1080 (or 1366 × 768 for wide screens)

RECOMMENDED SOFTWARE VERSIONS

The following software versions are recommended for Automator.

SOFTWARE	VERSION
Metadata database: MS SQL Server	2019
 Application server: Operating System IIS .NET Framework 	 Windows Server 2019 10.0 4.8
For end users: Browser	Google Chrome

BEFORE YOU BEGIN

Before you begin the installation process, you should plan your Monarch Server System (Automator product) to setup in a manner suited for your tasks.

System Components

The Monarch Server system consists of the following components:

- Configuration Service
- Agent Service

- Services
- Web Application (Admin)
- Repository

The Agent Service launches the following services:

- Datawatch.RemoteServices.AdminServicesHost.exe
- Datawatch.RemoteServices.MaintenanceDispatcherServiceHost.exe
- Datawatch.RemoteServices.NotificationsDispatcherServiceHost.exe
- Datawatch.RemoteServices.DataPumpDispatcherServiceHost
- Datawatch.RemoteServices.DataPumpServicesHost
- Datawatch.RemoteServices.DataPumpStorageServicesHost

Installer Preparation

Depending on a computer's local security policies and configuration, the execution of downloaded files might be blocked. In particular, when downloading a file through a Windows OS to an NTFS partition, the Windows OS considers this file as an attachment by default. As a result, the opening, unpacking, or execution of the file is "blocked," resulting in errors. To avoid the installer file of Monarch Server from being blocked, the following steps are recommended.

To unblock the installer file after download

- 1. Find the ZIP file of the Monarch Server installer.
- 2. Right-click on the ZIP file, and select Properties in the context menu.
- 3. Navigate to the **Security** section of the **General** tab in the **Properties** window. Find the **Unblock** check box beside the text "This file came from another computer and might be blocked to help protect this computer."
- 4. Select the Unblock check box to activate it.
- 5. Click **OK** to apply the change.

MONARCH SERVER INSTALLATION

Open the directory with the installation files, and check whether it contains the license file named **ds.lic**. If not, copy this file from the original Monarch Server Automation Edition installation media to the directory from which you are going to install Monarch Server Automation Edition.

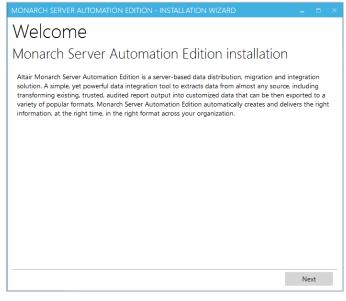
NOTE If the configuration machine name in the license file is not the same as the machine name of the installation, the warning message is displayed: "*Cannot install due to mismatch config machine name with current.*" The installation is aborted.

For Monarch Server Automation Edition v2023.1, you can proceed with the installation without a license. The licensing can be configured after completing the installation.

Installation Procedure

Steps:

1. In the directory with the installation files, double-click **MonarchAutomatorInstaller.exe** to launch the *Monarch Server Automation Edition Installation Wizard*.



Click Next.

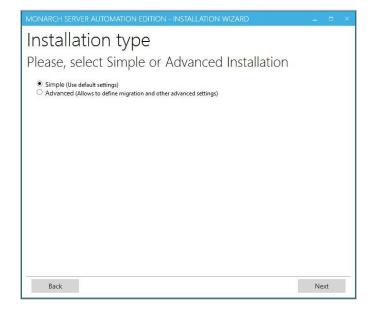
2. The License Agreement dialog box appears.

MONARCH SERVER AUTOMATION EDITION - INSTALLATION WIZARD $_$ \square \times
License Agreement
Please read the following license agreement
Datawatch Corporation Enterprise License Order Agreement Terms and Conditions Datawatch Corporation ("Datawatch") and the party identified on this Enterprise License Order Agreement (the "License") agree as follows:
1. LICENSE GRANT: Pursuant to this Enterprise License Order Agreement Tems and Conditions (the "License Agreement"), Datawatch Corporation ("Datawatch") grants Licensee the following non-exclusive, non-assignable, non-transferable, limited license rights to the software specified on the Datawatch Corporation Order Agreement (the "Order Agreement"), in machine-readable object code form only, any installation routines including license key codes, and the technical specifications, user documentation and training materials associated therewith (the "Documentation") (collectively, the "Software"), subject to Licensee's payment of the license fees as set forth in the Order Agreement and to the terms and conditions set forth herein.
(a) <u>Paid-up License</u> . Licensee may install and Use (as defined below), on a perpetual basis (subject to Section 7 below), one copy of the Software or the number of copies of Software specified in the Order Agreement.
(b) <u>Single Named User License</u> . The Software is licensed to a single named user ("Single Named User") to be used by that individual only on a single physical or virtual computer (the "Computer"). The Single Named User License may be installed on a personal computer or workstation provided that the use of the Software is restricted to the Single Named User. The license for a named individual user can be installed on a network server if the corresponding network server if the license has been purchased. A separate license fee must be paid for each additional Computer on <i>W</i> .
I accept the terms in the license agreement I Breaking Changes were reviewed Read
Back Next

If you agree to the license terms, select I accept the terms in the license agreement, and then click Next.

3. The **Installation type** dialog box appears. Choose between *Simple installation* and *Advanced installation*, and then click **Next**.

NOTE The Installation type dialog box is available only if no previous version is installed.



Simple Installation

1. The Install Location dialog box appears.

Web site directory: Use services location	IONAR	CH SERVER AUTOMATION EDITION - INSTALLATION WIZARD	- 1
Ocation Install services to: C:\Program Files\Datawatch\Datawatch Automator Bro Web site directory: Use services location C:\Inetpub\wwwroot\ Bro Site: Default Web Site Admin Virtual Folder: MSAdmin	nst	all Location	
Install services to: C\Program Files\Datawatch\Datawatch Automator Web site directory: Use services location C\Inetpub\wwwroot\ Bro Site: Default Web Site Admin Virtual Folder: MSAdmin	pec	ify Monarch Server Automation Edition in	stall
C:\Program Files\Datawatch\Datawatch Automator Browners	ocat	ion	
Web site directory: Use services location C:\inetpub\wwwroot\ Bro Site: Default Web Site Admin Virtual Folder: MSAdmin	Install	services to:	
CAInetpub/wwwroot\ Bro Site: Default Web Site Admin Virtual Folder: MSAdmin	C:\Prog	ram Files\Datawatch\Datawatch Automator	Browse
Site: Default Web Site Admin Virtual Folder: MSAdmin	Web si	te directory: 🗌 Use services location	
Default Web Site Admin Virtual Folder: MSAdmin	C:\Inetp	pub\wwwroot\	Browse
Admin Virtual Folder: MSAdmin	Site:		
MSAdmin	Default	Web Site	
	Admin	Virtual Folder:	
Port: Pool:	MSAdn	nin	
80 ASP.NET v4.0	80	ASP.NET v4.0	
	B	ack	Next

Specify the location settings for Automator installation:

- a. In the Install services to field, specify the folder for Automator installation.
- b. In the **Web Site directory** field, specify the site name where the web applications are to be installed. If you select the Use services location check box, the web application (Admin) will be installed in the Monarch Server Automation Edition directory.
- c. In the **Site** field, specify the site name for the web applications.
- d. Under Admin Virtual Folder, specify the name of the virtual folder for the Administrator web application.
- e. In the Port field, specify the port for the IIS running.

- f. In the **Pool** field, specify the name of the application pool to be used by the web applications.
- g. Click Next.
- 2. The Database Server dialog box appears.

MONARCH SERV	'ER AUTOMATION EDITION - INSTALLATION WIZARD		_ = ×
Databa	ase Server		
Specify d	atabase properties		
Install MS SQ	g SQL Server + installation L Server Express 2019 ; SQL Server Express 2019 is not supported for Content System		
Database serve	that you are installing to:		
(local)		•	Find Servers
Connection usir O Windows aut	nentication credentials of current user uthentication using Login ID and password		
Password:	••••••		
Database name			
DWCHAutomator			
Test Connectio	n		
Optional:	oft SQL Server Management Studio 18		
Back			Next

Specify the database server settings:

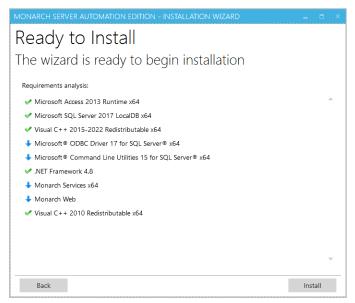
- a. Specify whether to use an existing SQL Server or to install one by selecting any of the following:
 - Use an existing SQL Server + installation: Select this option to use an existing installed SQL Server 2019.

Install MS SQL Server Express 2019: Select this option to install SQL Server Express 2019 on the local machine. In this case, the name of the database server instance will be DWCHAutomator.

- b. In the **Database server that you are installing** to field, specify the database server instance by doing one of the following:
 - Select (local) to install the application to the existing database server instance on your local machine.
 - Type the database server instance name in the field.
 - Click Find Servers to find and select instances of the existing database servers that are accessible from the local machine. The found servers populate the Database server that you are installing to drop-down list from which you can make your selection.
- c. In the **Connection using** field, specify the authentication method by selecting either current user Windows authentication or server authentication. If you select SQL Server authentication, enter the login ID and password (see the image below).

MONARCH SERVI	er automation edition - installation wizard	-		×
Databa	ase Server			
Specify da	atabase properties			
Install MS SQL Important note: MS Connection using Windows auth	g SQL Server + installation Server Express 2019 SQL Server Express 2019 is not supported for Content System g: ientication credentials of current user thentication using Login ID and password			
Login ID:				
Password:	•••••			
Database name:				
DWCHAutomator				
Optional:	oft SQL Server Management Studio 18			
Back		Ne	xt	

- d. In the Database name field, provide a name with which the Automator database will be created.
- e. Click Test Connection to verify the connection to the server you specified.
- f. Click Next.
- 3. The Ready to Install dialog box appears.



The **Requirements analysis** section shows the third-party components with the possibility to view the license terms.

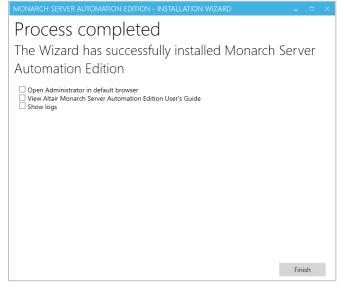
- Components with green tick marks are those that have been already installed on the local machine.
- Components with blue arrows are those that will be installed on the local machine.

To view the license terms for a third-party component, click the **License Terms** button next to the required component.

If you agree to the license terms, select I accept all the terms in all license agreements.

Click Install to begin the installation.

4. After the installation is complete, the **Process completed** dialog box appears.



If necessary, you can select one of the following check boxes:

- Open Administrator in default browser: Select to open the Admin application in the default browser.
- View Monarch Server Automation Edition User's Guide: Select to open the Monarch Server Automation Edition User's Guide.
- Show logs: Select to open the folder containing the installation logs.
- 5. Click Finish.

Advanced Installation

1. The Install Location dialog box appears.

	CH SERVER AUTOMATION EDITION - INSTALLATION WIZARD		
Inst	all Location		
Spec	ify Monarch Server Automation Edition instal	ĺ	
locat	ion		
Install	services to:		
C:\Prog	ram Files\Datawatch\Datawatch Automator	Browse	Ľ
Web si	te directory: 🗌 Use services location		10
C:\Inetr	pub/wwwroot/	Browse	
Site:			
Default	Web Site		
Admin	Virtual Folder:		
MSAdm	ìn		
Port:	Pool:		
80	ASP.NET v4.0		
Ba	ack	Next	Ũ
			-

Specify the location settings for Automator installation:

a. In the Install services to field, specify the folder for Automator installation.

- b. In the **Web site directory** field, specify the site name where the web applications are to be installed. If you select the **Use services location** check box, the web application (Admin) will be installed in the Monarch Server Automation Edition directory.
- c. In the **Site** field, specify the site name for the web applications.
- d. Under Admin Virtual Folder, specify the name of the virtual folder for the Administrator web application.
- e. In the **Port** field, specify the port for the IIS running.
- f. In the **Pool** field, specify the name of the application pool to be used by the web applications.

Click Next.

2. The Service Credentials dialog box appears.

MONARCH SERVER AUTOMATION EDITION - INSTALLATION WIZARD	- 8	\times
Service Credentials		
Specify a user name and password		
Specify the username and password of the user that has sufficient privileges to access all required resources op including network access. Local System may be selected if ALL required resources (input and output) are local to this machine and SQL So integrated security is not used. The user account must be in the form of DOMAIN/Username.		
Use "Local System Account"		
User Name:		
MONSERV13-5\Administrator	Browse	
Password:		
Back	Next	

Specify the credentials for the Server administrator:

- a. Select the Use "Local System Account" check box if you want to use your local system account.
- b. Otherwise, clear the check box and specify a custom user in the User Name field in the required format.
- c. In the **Password** field, enter the corresponding password for the specified user.
- d. To find and select a particular user in your domain, use Browse.
 Click Next.
- 3. The **Database Server** dialog box appears.

MONARCH SERV	ER AUTOMATION EDITION - INSTALLATION WIZARD		_ = ×
Databa	ase Server		
Specify d	atabase properties		
 Install MS SQ Important note: MS 	g SQL Server + installation L Server Express 2019 SQL Server Express 2019 is not supported for Content System that you are installing to:		
(local)		•	Find Servers
Requires SQL Serve	er Browser Service to be running on SQL Server host computer		
Connection usir	g:		
	nentication credentials of current user		
SQL Server au	thentication using Login ID and password		
Login ID:	sa		
Password:	•••••		
Database name			
DWCHAutomator			
Test Connectio	1		
Optional:	oft SQL Server Management Studio 18		
Back			Next

Specify the database server settings:

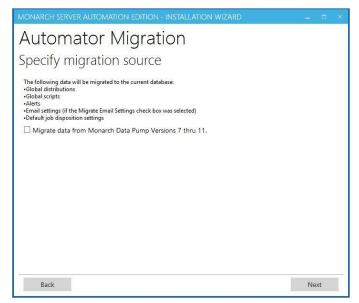
- a. Specify whether to use an existing SQL Server or to install one by selecting any of the following:
 - Use an existing SQL Server + installation: Select this option to use an existing installed SQL Server 2019.
 - **Install MS SQL Server Express 2019**: Select this option to install SQL Server Express 2019 on the local machine. In this case, the name of the database server instance will be *DWCHAutomator*.
- b. In the **Database server that you are installing to** field, specify the database server instance by doing one of the following:
 - Select (local) to install the application to the existing database server instance on your local machine.
 - Type the database server instance name in the field.
 - Click Find Servers to find and select instances of the existing database servers that are accessible from the local machine. The found servers populate the Database server that you are installing to drop-down list from which you can make your selection.
- c. In the **Connection using** field, specify the authentication method by selecting either current user Windows authentication or server authentication. If you select SQL Server authentication, enter the login ID and password (see the image below).

MONARCH SERV	'ER AUTOMATION EDITION - INSTALLATION WIZARD	-		×
Databa	ase Server			
Specify d	atabase properties			
Install MS SQ Important note: MS Connection usir Windows aut	hentication credentials of current user			
SQL Server au Login ID:	sa sa			
Password:	******			
Database name	:			
DWCHAutomator				
Optional:	oft SQL Server Management Studio 18			
Back		Ne	xt	

- d. In the Database name field, provide a name with which the Automator database will be created.
- e. Click Test Connection to verify the connection to the server you specified.

Click Next.

4. A dialog box with Automator migration settings appears.



To skip this step, click Next.

To migrate your existing data and email settings, refer to the following:

Automato	or Migration			
Specify migra	ation source			
•Global distributions •Global scripts •Alerts	igrated to the current database: e Email Settings check box was selected) ngs			
Migrate data from M	onarch Data Pump Versions 7 thru 11.			
Open Process Import				
🗌 Migrate Email Settir	igs:			
Location:	MonServ13-5			
Automator connection	1			
(local)	•	Find Se	ervers	
Connection using: Windows authentic	ser Service to be running on SQL Server host computer ation credentials of current user cation using Login ID and password			
Database name:				
Test Connection				
Back		N	ext	

Select Migrate data from Monarch Data Pump Version 7 thru 11 and specify the following migration settings:

a. Click the **Open Process Import** button to import processes. In the displayed **Open** dialog box, choose the file with the processes imported from the previous Monarch Data Pump versions.

NOTE You can select a number of files for migration. You can also delete unnecessary files.

- b. Select the Migrate Email Settings check box to transfer settings.
- c. In the Location field, enter location name. The specified location will be used for the imported processes.

NOTE By default, the name of the local machine is displayed.

- d. To set the connection to the database of the previous Monarch Data Pump version under Automator Connection, specify the following parameters:
 - Server Name
 - User Name and Password (in case of server authentication)
 - Database name
- e. To verify the Automator connection string, click Test Connection.

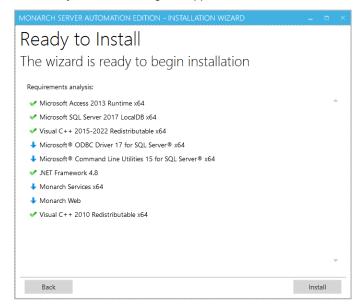
Click Next.

The following data will be migrated to the current database:

- Global distributions
- Global scripts
- Alerts
- Email settings (if the Migrate Email Settings check box was selected)
- Default job disposition settings

To go to the previous step, click Back.

5. The Ready to Install dialog box appears.



The **Requirements analysis** section shows the third-party components with the possibility to view the license terms:

- Components with green tick marks are those that have been already installed on the local machine.
- Components with blue arrows are those that will be installed on the local machine.

To view the license terms for a third-party component, click the **License Terms** button next to the required component.

If you agree to the license terms, select I accept all the terms in all license agreements.

Click Install to begin the installation.

6. After the installation is complete, the **Process completed** dialog box appears.

MONARCH SERVER AUTOMATION EDITION - INSTALLATION WIZARD \square \square \times
Process completed
The Wizard has successfully installed Monarch Server
Automation Edition
Open Administrator in default browser View Altair Monarch Server Automation Edition User's Guide Show logs
Finish

If necessary, you can select one of the following check boxes:

• Open Administrator in default browser: Select to open the Admin application in the default browser.

- View Monarch Server Automation Edition User's Guide: Select to open the Monarch Server Automation Edition User's Guide.
- **Show logs**: Select to open the folder containing the installation logs.
- 7. Click Finish.

Via the Start menu, under All Programs -> Altair Monarch Server -> Monarch Server, you can access the following options:

- Monarch Server Automation Edition Tutorial
- Monarch Server Automation Edition User's Guide
- □ Monarch Server Automation Edition Single Server Installation Guide
- Open Administrator in default browser
- □ Run Agent Service in console mode
- Run Configuration Service in console mode
- Run Configurator
- Uninstall

MONARCH SERVER POST-INSTALLATION ACTIONS

CHANGING THE USER ACCOUNT

NOTE	Monarch Server is a server-based application with many dependencies on folder
	permissions/accessibility, as well as system dependencies on prerequisite
	accessibility. Access would thus be compromised if there are no local administrative
	rights. To install Monarch Server, use either a local system account/NT
	AUTHORITY/SYSTEM that typically has full rights on a local machine or a domain
	account with local system administrative rights.

To change the user account

- 1. Click Start, select Control Panel, and point to Administrative Tools.
- 2. Double-click Services.
- 3. Double-click Monarch Server Agent Service.
- 4. Select the Log On tab, and specify account properties.

ieneral Log On R	ecovery Dependencies	
Log on as:		
O Local System acc	count	
Allow service	to interact with desktop	
This account:	NT AUTHORITY\SYSTEM	Browse
Password:	•••••	
Confirm password	•••••	

5. Click **OK** to save changes and start the service.

To run the Monarch Server Agent Service as a regular user

In the absence of admin privileges, the Monarch Server Agent Service may still be run with privileges of a regular user.

- 6. Grant "Log on as a Service" to the user. To do this, refer to Microsoft's topic on <u>Setting Properties "Log on as a</u> <u>Service."</u>
- 7. Grant "Windows Performance Counters." To do this, refer to the instructions about <u>User Permissions for</u> <u>Windows Performance Counters over RPC</u>.
- 8. Grant user permissions to run net.tcp services. To do this, refer to the topic about Modifying <u>SMSvcHost.exe.config for WCF</u>.
 - **NOTE** Note that the path should be C:\Windows\Microsoft.NET\Framework64\v4.0.30319\SMSvcHost.exe.config.
- 9. Add user to IIS_IUSRS group to allow the Agent service to manage web applications.
- 10. Grant full control to the installation directory (C:\Program Files\Datawatch).

CONFIGURING SSO

To use SSO

1. Open Administrator.

NOTE 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.

- 2. Under the Navigation Tree, click **Show Advanced Options**.
- 3. Click on Rights and Privileges, and then choose Security Provider.
- 4. Under Security Providers, select Active Directory, and then select Show SSO.

Home > Security Provider	-
My Home Report Warehouse 	< Security Provider
Automator RMS	Security Providers:
Portlets	 Strong password provider I show SSO □ Enable Active Directory Group Lookup
Server Library Rights and Privileges	
Security Provider	Save Clear Cancel
Roles User Groups	
Users	
System Settings	
 News 	
 System Reports 	
Hide advanced option	

NOTE	Mapping/aliasing of at least one administrator user is required. If there are no users mapped (MS and AD users are the same), the MS application is inaccessible without direct database modification of the Configuration table to the default state.
	To add an administrator user account, choose Users under Rights and Privileges in the Navigation Tree. In the <i>Users</i> window, click on "+" to add a new user.

In the User window, provide the necessary details. To check if the user account you are creating already exists, click on **Check User**. Do not forget to click **Save**.

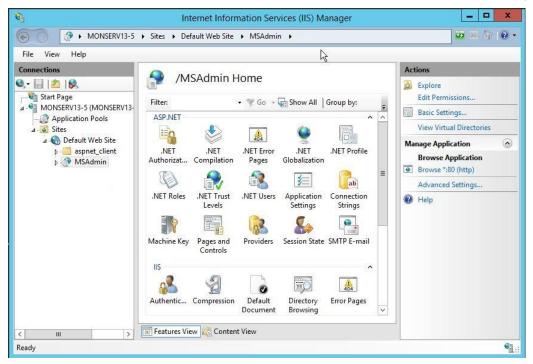
lome → Users										-
My Home Report Warehouse Automator RMS Server Library Rights and Privileges Roles	<	User Username: Full name: Password: Confirm Password: Email Address: User Class:		Persistent						
User Groups Users • System Settings <u>Show advanced options</u>		Privileges: Common privileges Administrator SubAdmin Portlets	Report Wareho Document : Save searo Report seal Develete docu. Download (Concatenat Create anni See trustee See trustee Add attacht Create Anni Create Anni Create Anni See Annota	search h roh Driginal Rey le Original R otation fication list on sav elist on sav ments to An otations for lete Annota	cort Reports e Annotation e Search notations all users	Automator privileges Automator Administrator Automator User Can Edit Soripts Automator Ught User Can Edit Schedules	RMS privileges RMS User RMS Administrator			
		Members of Save Clear	Save/Edit	Cancel	Copy Profile	8				

5. Modify the file web.config of the Administrator application (the path is C: Vinetpub/wwwroot/WSAdmin).

NOTE This step is crucial. To avoid potential application issues, make a backup of the web.config file before making any changes.

a. Disable the following code:

- 6. Make sure that **Windows**, **ASP.NET Impersonation** authentication on IIS for the Administrator application is **disabled**.
 - a. Go to Start > All apps > Windows Administrative Tools > Internet Information Services (IIS) Manager.



- b. Go to **MSAdmin > Authentication**, and disable ASP.NET Impersonation status.
- 7. Restart the Monarch Server Config and Monarch Server Agent Services, IIS.
- 8. On the login page of the Administrator application, click the **SSO** button.
 - **NOTE** If you fail to define at least one administrator user and cannot login to the Administrator page, edit the Configuration table, and set the OptionValue of SecurityProvider to DEFAULT. The steps are as follows:
 - a. Open Microsoft SQL Server Management Studio.
 - b. In the Object Explorer panel, click **Databases**, and choose the database you are using. (You may check the database name using the Monarch Server Configurator. Under Configurator, click the Instances tab. The Database Name is shown in the Global Settings window. Refer to the image below.)

Altair® Monarch® Serve	r		net.tcp://localhost	 Conn
Dashboard Configurator Settings				Suco
Servers Instances Modules Global Setting				
Add new Instance	Global Settings			
Instance	Server name:	(local)	User:	
DefaultInstance	Database name:	DWCHAutomator	Password:	
	 Encrypt Conr 	ection String	✓ Integrated Security	
			Test Connection D	atabase operations
	Instance Priority	1		
	Instance Priority	1		
	Instance License:			2
	Encryption			Browse
	Enabled			
				Browse
		Des servers File a) Determeter	\Datawatch Automator\Config\private_SHA1.kej	
	Symmetric: C	Program Files Datawatch	\Datawatch Automator\Config\private_SHA1.kej	Browse
	Asymmetric: C	\Program Files\Datawatch	\Datawatch Automator\Config\public_DSA_xml.	key Browse
	Use All Server	s		
			Cl	ear Apply

- c. Under **Tables**, right-click on **dbo.configuration**, and then choose *Edit Top 200 Rows*.
- d. Look for the OptionId "SecurityProvider," and then change its OptionValue to DEFAULT (case sensitive).

Connect 🕶 🛃 🛃 🔳 🍸 🛃 🍒		OptionId	OptionType	OptionValue	^
🐻 MONSERV13-5 (SQL Styver 12.0.2000 - N 🔨		PDFSplittingPa	0	5	
😑 🧰 Databases 👘 🗉		ReportSizeLimit	2	10000	
System Databases DWCHAutomator		ReportSizeLimit	2	10000	
DWCHAutomator DWCHMonarchServer	•	SecurityProvider	0	DEFAULT	
🗉 🧾 Database Diagrams		ShowAnnotation	0	1	
🖃 🚞 Tables		SuspendMonit	2	0	
🛞 🛄 System Tables		Version	0	14.0	
FileTables FileTables FileTables		ViewDocument	0	20	
dbo.AnnotationAttachme		ViewReportList	0	20	
🕑 🧾 dbo.Annotations		ViewReportPages	0	5	
dbo.ApiTokenInfos		ViewStructRows	0	20	
dbo.ClientApiInfos dbo.Config		ViewSummaryR	0	20	
dbo.Config dbo.Configuration		ViewTableRows	0	20	
🗉 📰 dbo.ContentRecognitionF		VisibleRowCount	2	25	=
😠 🛄 dbo.ContentRecognitionF		WebStartPage	0	NAV_A_MYHO	
dbo.ContentSystemInput: dbo.CustomQueryHelper dbo.CustomQueryHelper	*	NULL 4 55 of 66	NULL	NULL	~

SETTING USER SESSION TIMEOUT

The server provides two parameters that allow setting up a timeout period, after which user sessions within the application expire and need to be renewed. These parameters are stored in the file **web.config**, the path to which is as follows:

C:\inetpub\wwwroot\MSAdmin

One parameter is located in the authentication mode **Forms**; this parameter checks the time of the last request from the user when half the time defined in the parameter passes (for example, if the specified time is 10 minutes, the check will be performed on expiry of 5 minutes).

The other parameter is located in the Session State mode **In Proc**; this parameter checks when the last request was sent. Session timeout period is the amount of time from the last request.

In the Monarch Server applications, the parameter used by the system is the one with the smaller value.

SETTING ADMINISTRATOR PASSWORD AND E-MAIL ADDRESS

Before you use the Monarch Server System, you should set the password and e-mail address for the administrator account:

- 1. Open a browser and type the MSAdmin address in the address bar (for example, http://localhost/MSAdmin).
- 2. Log in using the default administrator account (the login name is "admin," and the password is "password").
- 3. On the Navigation Tree, double-click Rights and Privileges, and select Users.
- 4. Click admin.
- 5. Type a password in the Password and Confirm Password boxes, then click Save.
- 6. Click Save on the User page to save the changes.
- 7. On the Navigation Tree, double-click **System Settings**, and select the **Application Settings** tab at the top of the page.
- 8. Enter a valid e-mail address in the Administrator E-mail Address field.
- 9. Click Save.

INSTALLATION MAINTENANCE

This section describes how to add or remove Monarch Server components on a computer and how to repair a damaged installation.

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	-		_

You must shut down Monarch Server services before you attempt to do any of the tasks below.

REPAIRING A DAMAGED INSTALLATION

The Repair function of the Installation Wizard repeats the last installation to replace the missing or damaged files of the Monarch Server System. Use this option if you accidentally deleted some Monarch Server System files or if the Monarch Server System became unworkable due to damaged files.

NOTE The Repair function removes all changes you made in property files or registry settings. Therefore, before beginning a repair, backup all property files and registry keys first.

Warning: Do not try to work with the system registry if you are unfamiliar with it. Incorrect actions can make your system unusable.

To repair a damaged installation

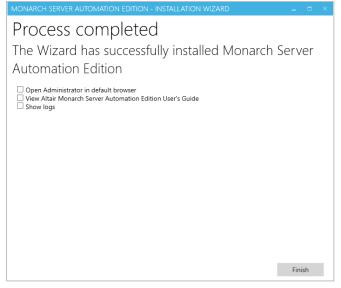
1. Run the **MonarchAutomatorInstaller.exe** file from your installation media, or use the **Add/Remove Programs** feature in the system's **Control Panel**. The Monarch Server Installation Wizard appears with program maintenance options.



2. Click Repair. The following dialog box appears, showing the installation progress.

Please wait			
This may take several minutes			
Acquiring:			
Microsoft® ODBC Driver 11 for SQL Server® x64			
Applying:			
Registering local servers			
	Ca	ncel	

3. When the repair is complete, the corresponding message will appear.



Click Finish to exit the Installation Wizard.

REMOVING ALL SYSTEM COMPONENTS

If necessary, you can remove all Monarch Server components and files installed on the computer.

To remove system components

- 1. Run the **MonarchAutomatorInstaller.exe** file from your installation media, or use the **Add/Remove Programs** feature in the system's **Control Panel**. The Monarch Server Automation Edition Installation Wizard is launched.
- 2. Click Uninstall. When the operation is complete, the corresponding message will appear.
- 3. Click Finish to exit the Installation Wizard.

UPGRADING INSTALLATION

UPGRADING THE EXISTING INSTALLATION

Upgrade from Advanced Installation

If you have the Monarch Server application v13.0 or higher installed on your computer and launch the version latest installer to upgrade it, the following warning message is displayed:

Windows Installer
Another version of this product is already installed. Installation of this version cannot continue. To configure or remove the existing version of this product, use Add/Remove Programs on the Control Panel.
ОК

NOTE Before uninstalling the previous version, ensure that you are able to restore the original environment, either wholly (e.g., full server/resource backups) or at minimum; the backups of the Monarch Server database; and all file-based resources dependent on the Automator functionalities being utilized. During an upgrade, customized settings such as authentication options and timeout settings in the web.config file (MSAdmin) from the previous installation are retained and transferred to the new web.config file. A backup file labeled as web.config.bak is also created; this may be used when the current web.config file becomes unrecoverable or when no other "working copy" exists on the machine.

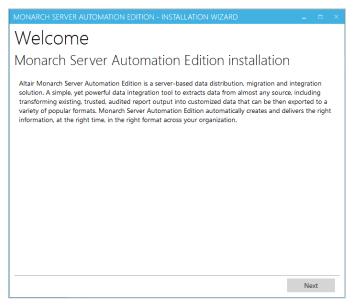
You need to remove the previous version of the application before installing Monarch Server.

NOTE No upgrade path is available for the advanced installation.

Upgrade from Simple Installation

If you have the Monarch Server application v12.2+ installed on your computer and need to upgrade it to the latest version, launch the Monarch Server installer and follow the steps below.

1. In the directory with installation files, double-click **MonarchAutomatorInstaller.exe** to launch the Monarch Server Installation Wizard.



2. Click Next.

The License Agreement dialog box appears.



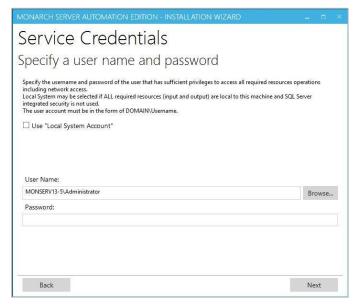
- 3. If you agree to the license terms, select I accept the terms in the license agreement, and then click Next.
- 4. The Upgrade dialog box appears. To upgrade the current application version, specify the Upgrade option.

MONARCH SERVER AUTOMATION EDITION - INSTALLATION WIZARD	-	Π	×
Upgrade			
Upgrade from previous version			
The previous version of application has been found. Please select type of installation:			
Back	Ne		

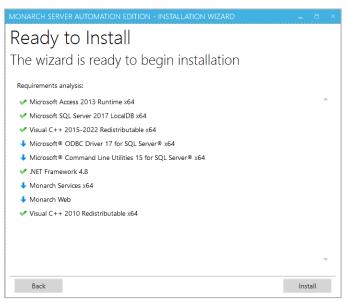
5. Click Next.

NOTE	The existing database remains, and it is upgraded to the new version. The application directory remains.
	With Monarch Server v2023.1, the 32-bit application could no longer be installed on a 64-bit operating system. When attempting to upgrade a Monarch Server 32-bit application, the following notification is displayed:
	Monarch Server 32-bit application is already installed. Upgrading to the newer version is not possible as 32-bit support has been deprecated. Please install the Monarch Server 64-bit application to proceed. Please refer to Altair Support for guidance if desired.
	MONARCH SERVER AUTOMATION EDITION 2022.0 - INSTALLATION WIZARD – C × Upgrade Upgrade from previous version Derevious version of application has been found. Preveious version of application has been found. Preveivous version of application has been found. Preveivous version of application has been found. Preveivous version of application is already installed. Upgrading to the newer version is not possible as 32-bit support has been for proceed. Please refer to Altair Support for guidance if desired.
	Back

The Service Credentials dialog box appears.



- 6. Specify the credentials for the Server administrator:
 - a. Select the Use "Local System Account" check box if you want to use your local system account.
 - b. Otherwise, clear the check box, and specify a custom user in the User Name field in the required format.
 - c. In the **Password** field, enter the corresponding password for the specified user.
 - d. To find and select a particular user in your domain, use Browse.
- 7. Click Next.
- 8. The Ready to Install dialog box appears.



The **Requirements analysis** section shows the third-party components with the possibility to view the license terms:

- Components with green tick marks are those that have been already installed on the local machine.
- Components with blue arrows are those that will be installed on the local machine.

To view the license terms for a third-party component, click the **License Terms** button next to the required component.

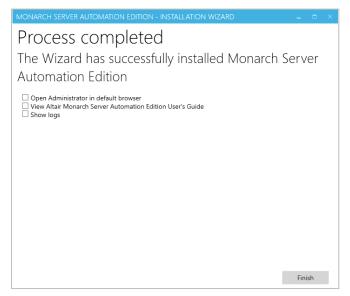
If you agree to the license terms, select I accept all the terms in all license agreements.

Click Install to begin the installation.

9. The previous version of Monarch Server is removed.

Click Finish.

10. After the installation is complete, the **Process completed** dialog box appears.



If necessary, you can select one of the following check boxes:

- Open Administrator in default browser: Select to open the Admin application in the default browser.
- View Monarch Server Automation Edition User's Guide: Select to open the Monarch Server Automation Edition User's Guide.
- Show logs: Select to open the folder containing the installation logs.
- 11. Click Finish.

NEW INSTALLATION

If you need to install the latest version to a new directory using a new database, launch the Monarch Server installer, and follow the steps below.

1. In the directory with installation files, double-click **MonarchAutomaterInstaller.exe** to launch the Monarch Server Installation Wizard.

MONARCH SERVER AUTOMATION EDITION - INSTALLATION WIZARD \square \square \times
Welcome
Monarch Server Automation Edition installation
Altair Monarch Server Automation Edition is a server-based data distribution, migration and integration solution. A simple, yet powerful data integration tool to extracts data from almost any source, including transforming existing, trusted, audited report output into customized data that can be then exported to a variety of popular formats. Monarch Server Automation Edition automatically creates and delivers the right information, at the right time, in the right format across your organization.
Next

Click Next.

2. The License Agreement dialog box appears.



If you agree to the license terms, select I accept the terms in the license agreement, and then click Next.

3. The **Upgrade** dialog box appears. To install the latest application version to a new directory, specify the **New Installation** option.

MONARCH SERVER AUTOMATION EDITION - INSTALLATION WIZARD			
Upgrade			
Upgrade from previous version			
The previous version of application has been found. Please select type of installation: New installation Upgrade			
Back	Ne	xt	

Click Next.

4. The Install Location dialog box appears. Proceed to steps 2 to 8 of the Advanced Installation.

CONFIGURING WEB APPLICATIONS

After installing Monarch Server Automation Edition, you can manually edit some of the parameters in the web.config file.

ADMIN

The default path to the file is as follows: C:\inetpub\wwwroot\MSAdmin\web.config.

The parameters listed below are located in the <appSettings> of the MSAdmin.

The recording format of each of the parameters is as follows:

<add key="parameterName" value="parameterValue" />

PARAMETER NAME	DESCRIPTION	DEFAULT VALUE
loginOutOnBrowserCloseEnabled	Enable immediate session termination when the browser or browser tab is closed.	false

CONTACT US

GET IN TOUCH

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

SALES CONTACT INFORMATION

Portal: <u>Contact Altair</u> US: + 1.800.445.3311 International: + 1.978.441.2200

SUPPORT CONTACT INFORMATION

Customer Portal: https://community.altair.com/community Email: dasupport@altair.com US: +1 800.988.4739 Canada: +1 978.275.8350 Europe, Middle East, Africa: +44 (0) 8081 892481